



2025 Bylaws and Rules

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2025 Bylaws & Rules Book – Canada

Bylaws

- [Article 1 – Objects](#)
- [Article 2 – Membership Qualifications and Obligations](#)
- [Article 3 – Membership Fees](#)
- [Article 4 – Board of Directors](#)
- [Article 5 – Officers](#)
- [Article 6 – Membership Meetings](#)
- [Article 7 – Offenses and Punishments](#)
- [Article 8 – Appeals](#)
- [Article 9 – Resignations](#)
- [Article 10 – Exceptions](#)
- [Article 11 – Amendments](#)
- [Article 12 – Applicable Law](#)

Chapter A: Publicity

- [A 101.1 General Publicity Rule](#)
- [A 101.2 Permissions and Prohibitions](#)
- [A 101.3 Violation of Publicity Rules](#)

Chapter B: All Publications

Article 101- General

- [B 101.1 File Copies, Subscription Promotion Offers](#)
- [B 101.2 International Editions](#)
- [B 101.3 Advertising Omitted](#)
- [B 101.4 Congregation-Wide Subscriptions of a Religious Publication](#)

Article 102 – Audits

- [B 102.1 Member Obligations](#)
- [B 102.2 Continuous Assurance Program](#)
- [B 102.3 Audit Report Contents and Differences](#)
- [B 102.4 Request Change of Auditors](#)
- [B 102.5 Time of Making Audits](#)
- [B 102.6 Initial Audit](#)
- [B 102.7 Audit Report Submitted to Publisher](#)
- [B 102.8 Costs](#)
- [B 102.9 Variations from Publisher's Statement](#)
- [B 102.10 Prices Incorrectly Reported](#)
- [B 102.11 Publication of Basic Annual Price](#)
- [B 102.12 Recalling Audit Report](#)
- [B 102.13 Reaudit Requests](#)
- [B 102.14 Reaudit Costs](#)
- [B 102.15 Variation Report](#)

Article 103 – Publisher's Statements and Quarterly Data Reports

- [B 103.1 Publisher's Statements and Quarterly Data Reports](#)
- [B 103.2 Time Limit for Filing Publisher's Statements or Quarterly Data Reports](#)
- [B 103.3 Publisher's Data Submissions – Conform to Audit](#)
- [B 103.4 Purpose and Content of General Explanatory Paragraph](#)
- [B 103.5 Snapshot Reports](#)
- [B 103.6 Amended Publisher's Data Submissions](#)
- [B 103.7 Publisher Circulation Accounting Methodology](#)

Article 104 – Miscellaneous

- [B 104.1 Subscriptions](#)

2025 Bylaws & Rules Book – Canada

- [B 104.2 International Subscriptions](#)
- [B 104.3 Dealer Accounts](#)
- [B 104.4 Checking Copies](#)
- [B 104.5 Net Cash Received for Subscriptions](#)
- [B 104.6 Lost, Missing, Damaged, and Unsold](#)
- [B 104.7 Bonuses, Allowances, and Limitations of Returns](#)
- [B 104.8 Employment of AAM Auditors](#)
- [B 104.9 Field Served](#)
- [B 104.10 Reports Furnished to Publisher Members](#)
- [B 104.11 Notifications on Violations](#)

[Chapter C: Newspapers](#)

- Article 101 – Paid Circulation
 - [C 101.1 Paid Circulation Defined](#)
 - [C 101.2 Prices](#)
 - [C 101.3 Combination Sales](#)
- Article 102 – Circulation Reporting
 - [C 102.1 Circulation Averages](#)
 - [C 102.3 Separate Editions and Affiliated Publications](#)
 - [C 102.4 Days Omitted from Averages](#)
 - [C 102.5 Distribution Area Maps](#)
 - [C 102.6 Weekly Newspaper Group Audit Plan](#)
- Article 103 – Qualified Circulation
 - [C 103.1 Qualified Circulation](#)
 - [C 103.2 Other Qualified](#)
 - [C 103.3 Business/Traveler Copies](#)
- Article 104 – Time of Making Audits
 - [C 104.1 Timing of Audit](#)
 - [C 104.2 Initial Audit](#)
 - [C 104.3 Reinstatement Audit](#)
- Article 105 – Other Qualification Standards
 - [C 105.1 Subscriptions Involving Digital Editions](#)
 - [C 105.2 Vacation Paks](#)
 - [C 105.3 Single-Issue Sales of Back Copies](#)
 - [C 105.4 Subscription Offers Based on Acceptance Unless Declined](#)
 - [C 105.5 Transfers and/or Purchase of Subscription Lists](#)
- Article 106 – Other Reports
 - [C 106.1 Brand View and Data Filing](#)
- Article 107 – Analysis by Reporting Areas and Delivery Methods
 - [C 107.1 List of Towns Receiving 100 or More Copies](#)

[Chapter D: Business Publications](#)

- Article 101
 - [D 101.1 Paid Circulation Defined](#)
 - [D 101.2 Prices](#)
- Article 102
 - [D 102.1 Multicopy Sales](#)
 - [D 102.2 Membership Benefit](#)
 - [D 102.3 Gift Subscriptions](#)
 - [D 102.4 Nondeductible Trade Show Subscriptions](#)
 - [D 102.5 Partnership Sales](#)

2025 Bylaws & Rules Book – Canada

Article 103

[D 103.1 Initial Audit](#)

Article 104

[D 104.1 Publisher's Statements](#)

[D 104.2 Timing of Audit](#)

Article 105

[D 105.1 Geographic Analysis](#)

[D 105.2 Business Analysis](#)

[D 105.3 Source Analysis](#)

[D 105.4 Mailing Address Analysis](#)

[D 105.5 Definition of Recipient Qualification](#)

Article 106

[D 106.1 Renewals](#)

Article 107

[D 107.1 Deferred Subscriptions](#)

[D 107.2 Back Copies](#)

Article 108

[D 108.1 Premium Defined](#)

[D 108.2 Premiums with Subscriptions/Single-Copy Sales](#)

[D 108.3 Premiums with Combination Sales](#)

[D 108.4 Subscriptions/Single-Copy Sales in Combination](#)

[D 108.5 Subscriptions Purchased with Award Points](#)

[D 108.6 Credit Subscriptions](#)

Article 109

[D 109.1 Extensions Because of Price Reduction](#)

[D 109.2 Extensions Because of Reduction in Frequency](#)

[D 109.3 Transfers](#)

Article 110

[D 110.1 Optional Subscription Sale Analysis](#)

[D 110.2 Separate Editions](#)

[D 110.3 Digital Editions](#)

[D 110.4 Multi-Title Digital Programs](#)

Article 111

[D 111.1 Additions and Removals](#)

Article 112

[D 112.1 Nonpaid Direct Request Circulation](#)

[D 112.2 Nonpaid Circulation Other Than Direct Request](#)

[D 112.3 Nonpaid Multicopy Same Addressee Circulation](#)

[D 112.4 General Explanation for Nonqualified Circulation](#)

[D 112.5 Regularly Scheduled Special Edition Circulation](#)

Article 113

[D 113.1 Unit Analyses](#)

Article 114

[D 114.1 Special Issues](#)

[Chapter E: Farm Publications](#)

Article 101

[E 101.1 Paid Circulation Defined](#)

2025 Bylaws & Rules Book – Canada

[E 101.2 Prices](#)

Article 102

[E 102.1 Multicopy Sales](#)

[E 102.2 Paid Multicopy Sales Defined](#)

[E 102.3 Gift Subscriptions](#)

[E 102.4 Membership Benefit](#)

Article 103

[E 103.1 Initial Audit](#)

Article 104

[E 104.1 Publisher's Statements](#)

Article 105

[E 105.1 Geographic Analysis](#)

[E 105.4 Distribution by Demographics](#)

[E 105.5 Source Analysis](#)

Article 106

[E 106.1 Renewals](#)

Article 107

[E 107.1 Deferred Subscriptions](#)

[E 107.2 Back Copies](#)

Article 108

[E 108.1 Premium Defined](#)

[E 108.2 Premiums with Subscriptions/Single-Copy Sales](#)

[E 108.3 Premiums with Combination Sales](#)

[E 108.4 Subscriptions/Single-Copy Sales in Combination](#)

[E 108.5 Credit Subscriptions](#)

Article 109

[E 109.1 Extensions Because of Price Reduction](#)

[E 109.2 Extensions Because of Reduction in Frequency](#)

[E 109.3 Transfers Due to Purchase of Subscription List, Cessation of Issuance or Merger](#)

Article 110

[E 110.1 Optional Subscription Sale Analysis](#)

[E 110.2 Separate Editions](#)

[E 110.3 Digital Editions](#)

[E 110.4 Multi-Title Digital Programs](#)

Article 111

[E 111.1 Nonpaid Direct Request Circulation](#)

[E 111.2 Nonpaid Circulation Other Than Direct Request](#)

[E 111.3 Multiple Subscriptions](#)

[E 111.4 Additions and Removals](#)

[E 111.5 Nonpaid Multicopy Same Addressee Circulation](#)

Article 112

[E 112.1 Special Issues](#)

[Chapter F: Consumer Magazines](#)

Article 101

[F 101.1 Paid Circulation Defined](#)

[F 101.2 Prices](#)

[F 101.3 Average Price](#)

Article 102

[F 102.1 Sponsored Sales](#)

2025 Bylaws & Rules Book – Canada

- [F 102.2 Gift Subscriptions](#)
- [F 102.3 Membership Sold Subscriptions](#)
- [F 102.4 Partnership Sales](#)
- Article 103
 - [F 103.1 Initial Audit](#)
- Article 104
 - [F 104.1 Timing of Audit](#)
 - [F 104.2 Publisher's Statements](#)
- Article 105
 - [F 105.1 Geographic Analysis](#)
 - [F 105.2 Distribution by Counties](#)
 - [F 105.3 Distribution by Demographics](#)
- Article 106
 - [F 106.1 Renewals](#)
- Article 107
 - [F 107.1 Deferred Subscriptions](#)
 - [F 107.2 Back Copies](#)
 - [F 107.3 Collection Stimulants](#)
- Article 108
 - [F 108.1 Premium Defined](#)
 - [F 108.2 Premiums with Subscriptions/Single-Copy Sales](#)
 - [F 108.3 Premiums with Combination Sales](#)
 - [F 108.4 Subscription/Single-Copy Sales in Combination](#)
 - [F 108.5 Subscriptions Purchased with Award Points](#)
 - [F 108.6 Credit Subscriptions](#)
- Article 109
 - [F 109.1 Extensions Because of Price Reductions](#)
 - [F 109.2 Extensions Because of Reduction in Frequency](#)
 - [F 109.3 Transfers Due to Purchase of Subscription List, Cessation of Issuance or Merger](#)
- Article 110
 - [F 110.1 Separate Editions](#)
- Article 111
 - [F 111.1 Advertising Rate Base or Circulation Guarantee](#)
- Article 112
 - [F 112.1 Special Issues](#)
- Article 113
 - [F 113.1 Analyzed Nonpaid Bulk Defined](#)
- Article 114
 - [F 114.1 Verified Circulation](#)
- Article 115
 - [F 115.1 Consolidated Media Report](#)
- Article 116
 - [F 116.1 Network Audit Program](#)
- Article 117
 - [F 117.1 Digital Issue Defined](#)
 - [F 117.2 Digital Issue Subscriptions and Single-Issue Sales](#)
 - [F 117.3 Multi-Title Digital Programs](#)

[Policies and Practices](#)

AAM Policy Regarding the Copyrighting of Reports

2025 Bylaws & Rules Book – Canada

Publicity Policy for Member Publications

Administrative Appeal to Board of Directors

AAM Policy Regarding Magazines Sold with Event Admission Tickets

Established AAM Practice of Auditing Copies of Newspapers Sold Through Racks or Honor Boxes

Policy Relating to Carrier Delivery – Office Collect Subscriptions and Pay-in-Office

Subscriptions on Independent Carrier Routes Reported in Newspaper Quarterly Data Reports and Audit Reports

Business and Farm Publication Loyalty Point Programs

2025 Bylaws & Rules Book – Canada

BYLAWS

Article 1 - Objects

The purpose of the Alliance for Audited Media (AAM) is to issue standardized media data and to verify those data by independent audit; and to disseminate the data via our own database and through other organizations for the benefit of advertisers, advertising agencies and others in the media industry. AAM audits report both the quantity and quality of the data allowing us to report facts without opinion.

Article 2 - Membership Qualifications and Obligations

2.1 Classes and Obligations of Membership

(a) There shall be eight classes of membership as follows:

- Advertisers.
- Advertising Agencies.
- Associates.
- Alternate Delivery Publishers.
- B2B Media Publishers.
- Farm Media Publishers.
- Magazine Media Publishers.
- News Media Publishers.

(b) Members shall abide by all published bylaws, rules, policies and practices of AAM. Associate members do not have voting rights.

2.2 Eligibility for Membership

(a) Advertisers: Any individual or entity that advertises shall be eligible for membership.

(b) Advertising Agencies: Any individual or entity that conducts an advertising agency or media buying service shall be eligible for membership.

(c) Associates: A parent company of an AAM publisher member, digital publisher, or any individual or entity that utilizes or reports information or other AAM data or utilizes services from AAM or its subsidiaries may apply for associate membership.

(d) Publisher Classes: Any individual or entity that publishes a publication eligible for membership in one of the publisher classes under subparagraphs (1) through (5) of this subsection shall be eligible for membership. Except in the case of publications admitted to associate membership by the board of directors, a publication otherwise eligible to membership shall not be admitted to membership except as a publisher member, and a publication ineligible for a membership as a publisher shall not be eligible to membership in any other class. All reference to a publisher member or membership for a publication in these bylaws shall mean the legal entity holding membership. Except as otherwise provided in these bylaws, a separate membership shall be taken out by a publisher member for each publication.

(1) B2B Media Publishers - Any individual or entity that publishes B2B media shall be eligible for membership.

(2) Farm Media Publishers — Any individual or entity that publishes farm media shall be eligible for membership.

(3) Magazine Media Publishers — Any individual or entity that publishes magazine media shall be eligible for membership.

(4) News Media Publishers — Any individual or entity that publishes newspaper media shall be eligible for membership.

2025 Bylaws & Rules Book – Canada

(5) Alternate Delivery Publishers – Any individual, out-of-home publisher, or entity not otherwise eligible for membership under classes 1 through 4 that distributes publications or other products on behalf of publishers or other third parties shall be eligible for membership as an alternative delivery publisher.

(e) Transfer of membership: Membership shall be nontransferable.

(f) Revision of membership eligibility requirements:

(1) Membership eligibility requirements may be determined only by the board of directors.

(2) Prior to any revision of the membership eligibility requirements of a publisher division, the board of directors shall submit the proposed revision in writing (print and/or digital) to the members of the division affected for an advisory vote.

(3) If an advisory vote does not favor the proposed revision, the proposed revision will be scheduled for discussion at the next annual meeting.

2.3 Forced Combinations

A newspaper, selling national advertising or subscriptions in forced combination with another newspaper or newspapers in the same city of publication or city zone, shall not be admitted to or continued in membership in AAM unless a membership is taken out and maintained for each of said newspapers regardless of frequency of publication.

2.4 Periodicals Selling Advertising as a Unit

When all advertising in two or more periodicals owned by the same person or entity is sold as a unit, such periodicals may be admitted under one membership. When all advertising in two or more periodicals owned by different persons or entities is sold as a unit, separate memberships will be required. In the case of separate memberships, each of said members shall be jointly and severally liable to discharge the combined obligations incident to the membership of each of them in AAM. In both cases a combined publisher's statement and a combined audit report shall be issued and the dues shall be computed upon the combined distribution.

2.5 Member Representative, Vote Representation

(a) Any individual or entity admitted to membership in AAM shall, at the time of admission, designate in writing and file with AAM on forms to be furnished by AAM the name of a member representative, who shall, at the time of appointment and so long as being the member representative, is employed by, and actively engaged in the operation of the member. The member representative shall be authorized and empowered to act in all dealings with AAM as well as to vote at all annual or special meetings of AAM on matters presented to the AAM membership as a whole or division specific. A member may change the member representative at any time by notifying AAM, and designating another person to act as member representative.

(b) Nothing contained in this bylaw shall limit the right of a member to execute a proxy to any person other than the member representative to vote on any AAM ballot, but in the absence of such proxy such member representative, or an officer of the member company/publication, shall be deemed to have full voting rights.

(c) AAM shall make available to its members upon request for review at AAM or an agreed upon location, only the name, title, company, and Canada Post mailing addresses of the individuals designated as member representatives.

2.6 Application for Membership - All

Application for membership shall be made on forms provided by AAM and all applicants shall therein agree to abide by the published bylaws, rules, policies and practices of AAM and all amendments and additions that may in due form be made thereto.

2025 Bylaws & Rules Book – Canada

2.7 Application for Publisher Membership

(a) Each applicant for publisher membership shall, with the application, deposit with AAM a sum of money equivalent to the estimated cost of the initial audit. The estimated cost shall be determined by the managing director. The release of an initial audit shall constitute qualification and acceptance of membership of the applicant. A publication applicant, upon acknowledgment by AAM of the receipt of both the application and the initial audit deposit, may publicize the fact of application only. If, within one year from date of application an initial audit has not been completed and released, the managing director may cancel the application, and communicate the cancellation to AAM's membership.

(b) The cost of preliminary examinations shall be included in the cost of the initial audit.

(c) If books and records are inadequate at time of the preliminary examination, the applicant shall agree to immediately install and maintain records adequate in accordance with AAM's requirements. If the applicant refuses to make such agreement or the agreement has not been carried out at the time of the next attempt at audit, the application shall be rejected and deposit made with the application shall be forfeited.

2.8 Publisher Duty to Install and Maintain Records

(Also see Rule C 105.19 Hawker (Street) Sales.)

It shall be the duty of each publisher member to install, maintain and make available to AAM auditors at all times, true and correct records, capable of being audited in accordance with the established auditing practices of AAM.

Publisher members may sell copies in quantities through agents, distributors and wholesalers, independent contractors or other third parties, however, the publisher shall remain responsible for the accuracy, completeness and accessibility of the records maintained by such organizations as though the records were maintained by the publisher.

Circulation data reported by publishers in AAM reports that cannot be substantiated because of the absence or unavailability of adequate records shall be subject to deduction in the audit report.

2.9 Transfer Between Divisions

(a) Any member publication seeking transfer to another publisher division shall submit a written request for transfer to the managing director.

The request shall include special reasons for the transfer, such as (but not limited to): change of format; change of nature or type of publication; change in editorial or advertising policy.

2.10 Notice of Changes

Where a change occurs in a publication for which a publisher holds a membership, such as (but without limitation to the following): change of name; change of format; change of the nature or type of publication, and similar changes which result from merger with another publication, acquisition of one or more other publications, being acquired by one or more other publications; or otherwise, the managing director shall be notified thereof in writing by the publisher member. If, after investigation, the managing director determines that the changes are not substantial, it shall be so reported, and AAM reports of the publication shall continue without interruption or change in the membership. If the managing director determines that the change or changes are substantial, he/she shall so report to the publisher of the publication involved. Thereupon the procedure for application for membership in Bylaws 2.6 and 2.7 shall be followed. No AAM reports shall be released; no claim of membership shall be made by the publication, until the release of the initial audit.

2025 Bylaws & Rules Book – Canada

2.11 Member Data Submission and Certification

Publisher members shall file with AAM for prompt release by AAM true statements of circulation and other relevant metrics in accordance with the AAM bylaws and rules for semi-annual or such other periods as may be determined by AAM.

These submissions must be approved by and certified by the senior circulation executive and/or other authorized individual as follows, "We certify that to the best of our knowledge all data set forth in this submission are true and report data in accordance with Alliance for Audited Media bylaws and rules." The data submitted shall be audited by AAM in accordance with its rules.

When conditions warrant, the board may waive such requirements and the audit shall contain the following disclosure: "Name of Newspaper was not required to submit quarterly data by special permission of the board of directors."

2.12 Access to Records

For the purpose of accomplishing the objects of AAM, AAM and its subsidiaries shall have the right of access to all books and records of members deemed necessary by AAM. This right of access may be exercised at any time not only for the purpose of making an audit but also for the purpose of verifying a detail or details of any data submitted to AAM, whether that data has been released or not; or for the purpose of investigating the accuracy of an audit report already released; or for obtaining information which, in the opinion of the managing director, may be pertinent to a future AAM report.

Publisher members shall also be responsible for maintaining AAM's right of access to records required for the purposes listed above that are maintained by other organizations used by the member to sell and distribute their publications.

All such information so obtained, together with transcripts of any such books and records, work sheets, memoranda, communications to AAM and its subsidiaries, and other information in the possession of AAM and its subsidiaries pertaining to an AAM report, shall be confidential and used solely for the above purposes, and shall not be available or used for any other purpose except by authority of the board of directors.

2.13 Suspension of Report Service

(a) When it has been determined by the auditors of AAM that the necessary records/data to complete an audit in accordance with established practice are not available or are incomplete, release of data may be temporarily suspended.

(b) When it is determined that the release of data or "AAM Audited" status of a publisher member should be temporarily suspended, the publisher shall be required to accept an agreement substantially as follows:

Owing to the condition of the circulation records or data of making an audit (or circulation data submission) for the months ended impossible, we, the undersigned, agree to install and maintain records/data according to AAM requirement.

We further agree to continue the payment of our membership fees during the period of suspension of service. It is our understanding that AAM will make an audit (provided proper records/data have been maintained for a period of at least months).

It is understood that, because an audit cannot be made at this time (or records/data are not available to permit the submission of data), AAM release of data or "AAM Audited" status will be suspended until the reinstatement audit or the necessary remediation has been made or released. (Signed).....Publisher

Should publisher refuse to sign this agreement, the publisher shall be subject to such penalty as may be determined by the board of directors.

(c) When service for a publisher is suspended under the provisions of paragraph (b) of this section, an audit shall be attempted at the earliest date practicable under the terms of the agreement made by the publisher. If, at that time, an audit is again impossible, the board shall be advised of AAM management's intended action including possible termination of membership.

2025 Bylaws & Rules Book – Canada

2.15 Waiver of Damages and Indemnification

(a) Purpose and Scope. To maintain the economic well-being of AAM for the benefit of the membership as a whole, the following provisions shall constitute a condition of membership, shall bind each member (and successor) and shall be for the direct protection of AAM (including its directors, officers, employees and agents).

(b) Limited Damage Waiver. Each member waives any right to assert claims for money damages against AAM or its subsidiaries for any action, negligence or breach relating to its performance or nonperformance of its activities or services, except that this waiver shall not apply to damages that are determined by final adjudication to have arisen from intentional misconduct on the part of AAM or its subsidiaries in verifying and disseminating erroneous circulation data or other data. In no event, without limiting the foregoing waiver, shall AAM or its subsidiaries be liable for damages which are punitive or multiplied. This provision shall be without prejudice to members seeking damages against other individual members or third parties, but members are expected to act with diligence to assert any grievances promptly so as to avoid incurring any substantial losses.

(c) Member Suits. Members may assert claims or actions for nonmonetary relief against AAM or its subsidiaries, but each member shall exercise the rights and remedies provided in the bylaws and rules. A member shall not make or bring any claim, suit, or proceeding against AAM or its subsidiaries until after the member has exhausted all rights and remedies provided under the bylaws and rules. Any member who brings an action against AAM or its subsidiaries or whose actions cause action to be taken against AAM or its subsidiaries shall fully reimburse AAM and its subsidiaries for all costs and expenses (including reasonable attorneys' fees) that AAM or its subsidiaries incurs, unless the member's action is successful in establishing a right to the relief sought.

(d) Indemnification. A member shall fully reimburse and indemnify AAM and its subsidiaries for all costs and expenses AAM and its subsidiaries incurs, including, without limitation, reasonable attorneys' fees and all sums paid by way of settlement, judgment, or other disposition, if AAM or its subsidiaries are named as a defendant, are required to respond to discovery, or are otherwise required to participate in litigation, disputes, investigations, regulatory actions, regulatory compliance, or any other proceedings relating to such member or relating to any publications or any media reported on behalf of a member in any AAM report.

(e) Enforcement. Any costs and expenses (including reasonable attorneys' fees) incurred by AAM or its subsidiaries to successfully enforce these provisions against any member shall be reimbursed by the member of AAM.

(f) Existing legal rights. The provisions of this bylaw shall supplement whatever rights and protections, including common law rights to contribution or indemnification, that AAM and its subsidiaries may otherwise have by separate agreement or operation of law, but in no event shall AAM and its subsidiaries be entitled to more than a full recovery in any claim for reimbursement for a loss, cost or expense.

Article 3 – Membership Fees

3.1 Membership Fees Obligation

Members of each class shall pay as part of their membership fees: dues, audit and service fees, computed on an annual basis hereinafter specified in this article.

3.2 Membership Fees by Classification

(a) Membership fees, inclusive of dues, audit and service fees, for each class of members shall be set by the board of directors, subject to the following provisions:

(1) Advertisers

Separate annual membership fees may be set for national and regional advertiser members.

2025 Bylaws & Rules Book – Canada

(2) Advertising Agencies

Separate annual membership fees may be set for advertising agency members.

(3) Publishers and Alternate Delivery Organizations

Annual membership fees for publishers and alternate delivery organizations shall be payable quarterly, semi-annually or annually.

(4) Newspapers Audited Every Other Year

For newspapers that qualified for every other year audits based on average daily circulation size, the yearly membership fees of newspapers audited every other year shall be one-half of the yearly membership fees for newspapers audited every year.

(5) Weekly Newspaper Group Audit Plan

The yearly membership fees for urban weekly newspaper members of a group audit plan shall be one-half of the yearly membership fees for weekly newspapers audited every year. Yearly membership fees of nonurban newspaper members of a group audit plan shall be one-quarter of the yearly membership fees for weekly newspapers audited every year.

(6) Associate Members

The annual membership fees of associate members may be set at different amounts, depending upon the nature of the activities of such members.

(b) A schedule of membership fees shall be on file at the offices of AAM.

3.3 Data Access and Audit Fees

(a) **Standard Data Access.** Members shall receive access to AAM data and services, as follows:

(1) **Advertiser, advertising agency and associate members** shall receive full access to AAM's Media Intelligence Center as part of membership fees.

(2) **Publisher members** shall receive full access to AAM's Media Intelligence Center as part of membership fees, and report service provided for in B 104.10 of the rules.

(3) Newspaper Supplements.

Publications qualifying for associate membership as newspaper supplements shall receive quarterly newspaper supplement statements which shall report only a summary of the average total circulation and the average unpaid distribution of member newspapers of AAM with which the supplement is distributed and as reported in the distributing newspapers' quarterly data reports. The records of newspaper supplement associate members shall be subject to audit at any time and to the extent determined necessary by AAM's management or the board of directors. In addition, newspaper supplements shall receive full access to AAM's Media Intelligence Center as part of membership fees.

(4) **Consolidated newspaper groups** for which consolidated newspaper statements are issued under C 106.2, shall receive the same service as that of publisher members under B 104.10.

(b) **Additional Report Services.** In addition to the annual membership fees paid, each member of AAM may purchase custom reports at rates that may be established by AAM from time to time.

(c) **Audits.** As part of annual membership fees, each publisher member shall pay the cost of the audit and such other costs as may be required by the rules and standards of AAM. The rate used to establish this fee shall be set by the board of directors, or in the case of a digital publisher and out-of-home media publisher, outlined in the letter of agreement (LOA) signed by each member.

2025 Bylaws & Rules Book – Canada

3.4 International Publications

Publications outside the United States and Canada shall pay the extra cost involved over the amount of the standard membership fees applicable to auditing service, prorated among the publications in the respective localities.

3.5 Publications Indebted to AAM

No AAM report shall be released or audit made of a publication delinquent in membership fees or otherwise indebted to AAM.

3.6 Adjustment of Membership Fees

When, in the judgment of the board of directors, the regular membership fees from the members for any fiscal period are in excess of, or less than, the amount necessary for the operation of AAM, the board of directors may, for the succeeding fiscal period, revise the membership fees to meet more nearly the actual cost of the operation of AAM, taking into account the excess or deficiency, as the case may be, of membership fees previously paid.

3.7 Ownership of Copyright and Indemnification

(a) The members agree that title to all data which the members supply to AAM is assigned to and becomes the property of AAM. AAM shall obtain and retain ownership of its copyright and its copyrighted materials in whatever form disseminated, or from whatever source the copyrighted data was originally acquired.

(b) Any member furnishing data to AAM, as is periodically required under the terms of being a member, or, to AAM's Media Intelligence Center, or any member being furnished, supplied or sold, with or without compensation, any data from AAM's Media Intelligence Center, is subject to the following provisions:

- (1) AAM obtains legal title to all data supplied by members by an automatic assignment of title to the data from each member to AAM. AAM shall retain legal title to all data furnished to members.
- (2) Members are granted the nonexclusive legal right to use any data or other publication protected or owned by AAM only in accordance with the terms set forth specifically in the publicity rules and only in accordance with all other bylaws, rules and policies. AAM shall retain the exclusive copyright to such data. Any report furnished to a member or members that is published by AAM incorporating data from any source shall bear at least the first sentence of the following inscription:

Copyright, Year (of publication) Alliance for Audited Media. All rights reserved. No part of this report, whether in written form or transmitted electronically, may be reproduced, used or transmitted in any form or by any means, without express written permission of the publisher, Alliance for Audited Media, 48 W. Seegers Road, Arlington Heights, Illinois 60005-3913.

- (3) Members either supplying or receiving data agree to indemnify AAM against all loss, liability, damage and expense arising out of any claim of inaccuracy or error in such information, including but not limited to a claim by any other member reported in any form or by any other user of data from AAM's Media Intelligence Center.

Article 4 - Board of Directors

4.1 Responsibility, Vacancies

The control and management of AAM shall be vested in a board of directors consisting of 35 voting members who shall be individuals employed by and actively engaged in the operations of a member. These directors shall serve without salary and shall be elected for a term of three years and until the election and qualification of their successors. Any vacancy occurring relating to the 35 board members elected by

2025 Bylaws & Rules Book – Canada

AAM's members may be filled by a majority vote of the directors present at any regular or special meeting of the board of directors. The director so elected or chosen to fill the vacancy shall serve until AAM's next annual meeting and for an initial three-year term thereafter.

4.2 Board of Director Representation

(a) Directors Elected by AAM's Members

For carrying out the objects of AAM, the 35 directors elected by AAM's voting members will be divided into the following divisions:

Advertiser and Advertising Agency Division; News Media Division; Magazine Media Division; Farm Media Division; B2B Media Division; and Alternative Delivery Publisher Division.

The 35 members of the board of directors elected by AAM's members shall consist of representatives from each division as follows:

Advertiser and Advertising Agency Divisions: 18 members with at least one representative of the 18 based in Canada representing Canadian Advertiser and Advertising Agency members.

Publisher Divisions: 17 members

- News Media Division — six members (five U.S.-based and one Canada-based).
- Magazine Media Division — four U.S.-based members.
- B2B Media and Farm Media Division jointly — five U.S.-based members.
- Magazine Media Division, Farm Media Division, and B2B Media Division, jointly — at least one member identified as the Canadian Periodical Publisher Director (who shall be a Canadian member of one of these three divisions).
- Alternative Delivery Publisher Division – one U.S.-based alternative delivery publisher.

(b) Advisory Directors Elected by AAM's Board of Directors

AAM's board of directors may elect up to three non-voting advisory board members. Advisory board members shall be individuals who the AAM board of directors believes can provide valuable insights and perspectives regarding AAM's business operations, goals and purposes.

4.3 Nomination and Election

(a) Nominations Generally. At or prior to the annual meeting, the voting members shall nominate and elect candidates to succeed the directors whose terms have expired as described in Bylaw 4.2.

(1) All nominations shall be made by the members of the respective divisions in writing (hard copy or email bearing the member company name) addressed to the secretary at AAM headquarters and received not later than 60 days prior to the annual meeting, stipulating the name of the nominee, the directorship for which the nomination is made, and bearing the names of the nominator and a seconder, both eligible to vote.

The secretary shall notify all members eligible to vote in each division's annual election as required by Bylaw 6.1 of the name of each nominee so nominated, along with biographical data of each nominee.

(2) All of the members of each respective membership division eligible to vote, shall be eligible to nominate and vote on the election of all of the directors to be elected to represent their respective division, except:

(b) Exceptions.

(1) Canadian Advertiser, Advertising Agency, and News Media Directors. Only the Canadian members of the advertiser, advertising agency and news media divisions, respectively, who shall constitute separate nominating groups within each of their respective divisions, shall be eligible to nominate and vote on the nomination of the Canadian directors representing their respective divisions. Canadian advertiser, advertising agency and news media members shall not be eligible to nominate or vote on the

2025 Bylaws & Rules Book – Canada

nomination of the other directors representing their respective divisions.

(2) Canadian Periodical Publisher Director. Only the Canadian members of the magazine media division, farm media division and B2B media division, who shall collectively constitute a separate nominating group, shall be eligible to nominate and vote on the nomination of the Canadian director to represent those divisions jointly who shall be referred to as the Canadian periodical publisher director. The Canadian members of the magazine media division, farm media division and B2B media division shall not be eligible to nominate or vote on the nomination of any other directors.

(c) Election Standard. The candidate or candidates nominated as hereinabove provided receiving the highest number of votes from the members eligible to vote, shall be declared the elected representative of each respective division or separate nominating group.

4.4 Powers

The board of directors shall have the power to make, publish and enforce such rules and standards as they may deem necessary for the proper conduct of the business of AAM. Such rules and standards shall be in full force and effect until repealed, modified, altered or amended by the board of directors. Any such rule or standard may also be repealed, modified, altered or amended by a majority of the members present in person or by proxy, by written ballot, at any regular meeting of the members of AAM or at any special meeting called for that purpose, provided that the proposed repeal, modification, alteration or amendment is set forth in the notice of the meeting, sent to all members as required by Bylaws 6.1 and 6.7.

4.5 Meetings, Quorum, Attendance

Regular and special meetings of the board shall be held upon the call of the chairman of the board or of any five members of the board of directors. Ten days' notice of the time and place shall be given in writing by the secretary to all directors of the holding of any board meeting. A majority of all members of the board shall constitute a quorum. A majority of all members of designated committees of the board shall constitute a quorum of said committee.

The act of the majority of the directors present at a meeting at which a quorum is present shall be the act of the board of directors or a committee, unless the act of a greater number is required by the Illinois General Not For Profit Corporation Act of 1986 or these bylaws.

Any director who shall cease to be employed by and actively engaged in the operations of a member company, shall no longer be eligible to serve as a director. Such director shall have the option to continue to serve for up to a maximum of six months or until the expiration of their elected term, whichever comes first, while seeking to be employed and actively engaged in the operations of a member company within the constituency originally elected to represent. If the director is unable to reengage in the operations of a member company within the allotted time period, such director shall resign from the board or in the absence of a resignation, shall be removed by board action.

The board of directors may also vote to remove a director. The board's considerations will include regular occurrences of absenteeism from either in-person and/or telephonically held board meetings, whether such director has provided the board with regular contributions for the betterment of AAM, and the level of engagement in representing the membership constituency such director was elected to serve. The director may petition the board for an exception to the application of this bylaw, and only if such petition for an exception is approved by the board would such director be eligible to continue to serve.

Directors' meetings, either regular or special, may be held within or without the state of Illinois.

4.6 Committees

The board of directors shall create such committees as may be necessary for carrying on the work and accomplishing the objects of AAM, the members of such committees and chairman thereof to be appointed by the chairman of the board subject to the approval of the board of directors. The members of any special investigation committee, as referred to in Bylaw 4.7, shall be appointed and the chairman thereof designated by the chairman of the board.

2025 Bylaws & Rules Book – Canada

4.7 Special Investigation

(a) When and as a special investigation of the circulation covered by a any AAM report is requested by a member or when the managing director is of the opinion that a special investigation of the circulation covered by any AAM report is advisable or necessary, then and in either of such events it shall be the duty of the managing director to advise the chairman of the board that such request has been made or that such special investigation is advisable or necessary. The chairman of the board shall forthwith appoint a committee to be designated as a special investigation committee consisting of three members. The chairman of the committee shall be a member of the board of directors and the other two may be selected from either the board of directors or from the membership outside the board of directors. It shall be the duty of such committee to consult with and advise the managing director as to whether or not in any particular case a special investigation shall be made and to fix and determine the terms and conditions under which it shall be made.

(b) Each publication which requests an investigation shall make an advance deposit against the cost of the special investigation, in the amount determined by the special investigation committee.

(c) The direct and indirect costs of the special investigation shall be allocated as follows:

(1) If the deductions made are less than 2 percent of the publication(s) on which the investigation is being requested, the publication(s) that requested the investigation shall bear the entire cost.

(2) If the deductions made are more than 2 percent but less than 5 percent on this publication(s) on which the investigation is being requested, the publication(s) that requested the investigation shall bear 50 percent of the audit cost of the other publication(s) plus the entire cost of their own audit.

(3) If the deductions made are 5 percent or more on the publication(s) on which the investigation is being requested and 5 percent or more on the publication(s) that made the request, each publication will be charged for the audit hours required on the investigation of their respective publication(s).

(4) If the deductions made are 5 percent or more on the publication(s) on which the investigation is being requested and less than 2 percent on the publication(s) that made the request, the publication(s) on which the investigation was first requested shall bear the entire cost.

(5) If the deductions made are 5 percent or more on the publication(s) on which the investigation is being requested and between 2 percent and 5 percent on the publication(s) that made the request, the publication(s) on which the investigation was first requested shall bear 50 percent of the audit cost of the other publication(s) plus the entire cost of their own audit.

(d) No publicity shall be given to a special investigation either by the publication(s) being investigated or AAM until the special investigation is completed and the results issued either in the form of an audit report and/or other standard report at which time the provisions of Chapter A, Publicity Rules shall apply.

(e) Upon completion of the special investigation, the managing director shall make a report thereon to the board of directors.

4.8 Indemnification

(a) AAM shall indemnify any person who was or is a party, or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative (other than an action by or in the right of AAM) by reason of the fact that such person is or was a director, officer, employee or agent of AAM, or who is or was serving at the request of AAM as a director, officer, employee or agent of another audit bureau, partnership, joint venture, trust or other enterprise, against expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred by such person in connection with such action, suit or proceeding, if such person acted in good faith and in a manner reasonably believed to be in, or not opposed to, the best interests of AAM, and, with respect to any criminal action or proceeding, such person had no reasonable cause to believe the subject conduct was unlawful. The

2025 Bylaws & Rules Book – Canada

termination of any action, suit or proceeding by judgment, order, settlement, conviction, or upon a plea of nolo contendere or its equivalent, shall not, of itself, create a presumption that a person did not act in good faith and in a manner which reasonably believed to be in or not opposed to the best interests of AAM, and with respect to any criminal action or proceeding, had reasonable cause to believe that the subject conduct was unlawful.

(b) AAM shall indemnify any person who was or is a party, or is threatened to be made a party to any threatened, pending or completed action or suit by or in the right of AAM to procure a judgment in its favor by reason of the fact that such person is or was a director, officer, employee or agent of AAM, or is or was serving at the request of AAM as a director, officer, employee or agent of another audit bureau, partnership, joint venture, trust or other enterprise, against expenses (including attorneys' fees) actually and reasonably incurred by such person in connection with the defense or settlement of such action or suit, if such person acted in good faith and in a manner reasonably believed to be in, or not opposed to, the best interests of AAM, and except that no indemnification shall be made with respect to any claim, issue or matter as to which such person has been adjudged to have been liable for negligence or misconduct in the performance of duty to AAM, unless, and only to the extent that the court in which such action or suit was brought shall determine upon application that, despite the adjudication of liability, but in view of all the circumstances of the case, such person is fairly and reasonably entitled to indemnity for such expenses as the court shall deem proper.

(c) To the extent that a present or former director, officer, employee or agent of AAM has been successful, on the merits or otherwise, in the defense of any action, suit or proceeding referred to in Bylaw 4.8(a) and (b), or in defense of any claim, issue or matter therein, such person shall be indemnified against expenses (including attorneys' fees) actually and reasonably incurred in connection therewith if that person acted in good faith and in a manner he or she reasonably believed to be in, or not opposed to, the best interest of AAM.

(d) Any indemnification under Bylaw 4.8(a) and (b) (unless ordered by a court) shall be made by AAM only as authorized in the specific case, upon a determination that indemnification of the director, officer, employee or agent is proper in the circumstances because such person has met the applicable standard of conduct set forth in Bylaw 4.8(a) and (b). Such determination shall be made: a) by the board of directors by a majority vote of a quorum consisting of directors who were not parties to such action, suit or proceeding, or; b) if such a quorum is not obtainable, or, even if obtainable, if a quorum of disinterested directors so directs, by independent legal counsel in a written opinion.

(e) Expenses (including attorney's fees) incurred in defending a civil or criminal action, suit or proceeding may be paid by AAM in advance of the final disposition of such action, suit or proceeding, as authorized by the board of directors in the specific case, upon receipt of an undertaking by or on behalf of the director, officer, employee or agent to repay such amount, unless it shall ultimately be determined that such person is entitled to be indemnified by AAM as authorized by this Bylaw 4.8. Such expenses (including attorney's fees) incurred by former directors and officers or other employees and agents may be so paid on such terms and conditions, if any, that the board of directors deems appropriate.

(f) The indemnification and advancement of expenses provided by or granted under the other sections of this Bylaw 4.8 shall not be deemed exclusive of any other rights to which those seeking indemnification or advancement of expenses may be entitled under any bylaw, agreement, vote of disinterested directors, or otherwise, both as to action in such person's official capacity and as to action in another capacity while holding such office and shall continue as to a person who ceased to be a director, officer, employee or agent, and shall inure to the benefit of the heirs, executors and administrators of such a person.

(g) AAM shall have the power to purchase and maintain insurance on behalf of any person who is or was a director, officer, employee or agent of AAM, or who is or was serving at the request of AAM as a director, officer, employee or agent of another audit bureau, partnership, joint venture, trust or other enterprise, against any liability asserted against such person and incurred in any such capacity, or arising out of such person's status as such, whether or not AAM would have the power to indemnify against such liability under the provisions of this Bylaw 4.8.

(h) If AAM has paid indemnity or has advanced expenses to a director, officer, employee or agent, AAM shall report the indemnification or advance in writing to the board of directors with or before the notice of the next board of directors' meeting.

2025 Bylaws & Rules Book – Canada

Article 5 - Officers

5.1 Board Officers

(a) The officers of AAM shall consist of a chairman of the board, four vice chairmen (who may at the option of the board be designated first, second, third and fourth vice chairman respectively), a secretary and a treasurer. One of the vice chairmen shall be a representative of a publisher media division. Two vice chairmen shall be representatives of either the advertiser or advertising agency divisions. One of the vice chairmen shall be representative of the Canadian membership. These officers shall be elected by the board of directors and shall hold office for a period of one year and until the election and qualification of their successors.

(b) The chairman of the board of directors must be employed by or actively engaged in the operation of an advertiser or advertising agency member. The chairman shall not serve for more than two consecutive terms.

(c) The board of directors shall elect a CEO who shall serve as chief executive and managing director of AAM; and also, at the discretion of the board of directors, a president and one or more vice presidents whose function shall be determined by the board of directors. The CEO, president and vice presidents shall not be members of the board of directors. The CEO shall be responsible to the board of directors. The election of the CEO, president and the vice presidents, if any, shall be for a term of not more than 3 years or such shorter term as may be fixed for a nonprofit corporation by the laws of the state of Illinois from time to time in effect.

5.2 Chairman of the Board

(a) The chairman of the board shall be the presiding officer at all meetings of AAM and of the board of directors. The chairman shall appoint the members and chairmen of such committees, as may be created by the board of directors for carrying on the work and accomplishing the objects of AAM, subject to the approval of the board of directors, and shall also be an ex officio member without vote, of all committees. The chairman of the board shall also have the responsibility for calling regular and special meetings of the board of directors.

(b) In the absence or incapacity of the chairman of the board, the vice chairmen, in their successive order, shall perform the chairman's duties, and shall also perform such other special duties as may from time to time be delegated to them by the board of directors.

5.3 Secretary

The secretary shall keep a record of all meetings of AAM and of the board of directors and of any of the committees having authority of the board of directors. On behalf of the secretary and under his/her supervision the managing director, or such individual on his/her staff as may be designated by him/her, shall perform the duties as assistant secretary to complete the work of AAM.

5.4 Treasurer

The treasurer shall supervise the accounts of AAM, receive all monies, pay bills when properly approved and preserve vouchers for all payments. The treasurer shall present an annual report of AAM and such other reports as may be required from time to time by the board of directors. On behalf of the treasurer and under his/her supervision the managing director, or such individual on his/her staff as may be designated by him/her, shall perform the duties as assistant treasurer to complete the work of AAM.

5.5 CEO and Managing Director

(a) The CEO and managing director, hereinafter referred to in this section and in the rules as the "managing director," shall, subject only to the general supervision of the board of directors, be charged with the responsibility for directing all operations of AAM required for carrying on the work and accomplishing the objects of AAM as authorized by the board of directors.

2025 Bylaws & Rules Book – Canada

(b) It shall be the duty and responsibility of the managing director to interpret and enforce the rules and standards fixed from time to time by the board of directors for the members of AAM, to investigate charges or accusations against members under Article 7 of the bylaws, and to conduct the special investigations and make reports and recommendations thereon as provided in Bylaw 6.7. He/she shall make all necessary contracts on behalf of AAM subject to the approval of the board of directors.

(c) He/she shall have the authority to employ, discharge, and fix the compensation of such employees as may be reasonably required for carrying on the general operations of AAM. He/she may appoint and employ such assistants under such designations as he/she may deem advisable and fix their compensation. He/she shall attend all regular and special meetings of the board of directors, and make a report annually to the board of directors, or more frequently if required by them, setting forth the progress and results of the operations under his/her charge, together with suggestions tending to improve the work of AAM.

(d) On behalf of the secretary and under his/her supervision the managing director shall keep and maintain at the registered office of AAM a record giving the names and addresses of the members entitled to vote.

(e) The managing director shall also perform such other duties as the board of directors may require and he/she shall be responsible to the board of directors for all matters that may be necessary for the proper operation of AAM.

5.6 Bonding Officers or Employees

Such officers or employees as may be designated by the board of directors may be bonded for such sums as may be determined by the board of directors, the premiums on such bonds to be paid by AAM.

5.7 Removal from Office

Any officer may be removed from office by affirmative vote of at least two-thirds of the members of the board of directors whenever in their judgment the best interests of the corporation will be served thereby. The removal of an officer shall be without prejudice to the contract rights, if any, of the officer so removed.

Article 6 - Membership Meetings

6.1 Time and Date of Annual Meeting

An annual meeting of the members of AAM shall be held at a time and date as determined by the board of directors. Notice in writing (print or electronic) shall be given by the secretary to all members not less than 10 days nor more than 40 days prior to the date of such meeting.

6.2 Votes, Proxies

(a) Each member (excluding Associate Members) shall be entitled to one vote on each matter submitted for a vote at a meeting or through informal action as permitted by Section 6.8; provided, however, votes to elect directors shall be conducted by Divisions as provided in Section 4.3. There shall be no cumulative voting. Associate Members do not have voting rights.

(b) Each member entitled to vote at a meeting of members or to vote by informal action pursuant to Section 6.8 may authorize another person or persons to act for him or her by proxy executed in writing by the member or by that member's duly authorized attorney-in-fact, but no such proxy shall be voted or acted on after 11 months from the date of its execution.

(c) Members entitled to vote may participate in and act at any meeting through the use of a conference telephone or interactive technology,

2025 Bylaws & Rules Book – Canada

including but not limited to electronic transmission, Internet usage, or remote communication, by means of which all persons participating in the meeting can communicate with each other, and such participation in a meeting shall constitute presence in person at the meeting of the person or persons so participating.

6.3 Quorum

At any meeting of AAM members holding one-tenth of the full votes entitled to be cast, represented in person or by proxy, shall constitute a quorum for the transaction of business, and a majority vote shall decide all questions, unless otherwise provided by the bylaws.

6.4 Resolutions

All resolutions must be submitted in writing to the chairman before being put to vote.

6.5 Reports

Annually the chairman of the board shall report upon the activities of AAM and the treasurer shall submit a financial report. These reports can be presented in person, in writing, via webconference, or posted on AAM's website.

6.6 Special Meetings

Special meetings of AAM may be called by the chairman of the board or by the board of directors. A special meeting may also be called by members having one-twentieth of the full votes entitled to be cast at such meeting. Special meetings shall be held at a place to be designated by the board of directors. Notice of the date and purpose of such meeting shall be sent (print or electronic) by the secretary to all members at least 10 days prior to the date of such meeting.

6.7 Procedures

Except as expressly provided herein, the procedure at all meetings of AAM, divisional meetings and committee meetings, shall be governed by "Robert's Rules of Order."

6.8 Informal Action By Members Entitled to Vote

Any action which may be taken at a meeting of the members entitled to vote, may be taken by ballot without a meeting in writing by mail, e-mail, or any other electronic means pursuant to which the members entitled to vote thereon are given the opportunity to vote for or against the proposed action, and the action receives approval by a majority of the members casting votes, or such larger number as may be required by the Illinois General Not For Profit Corporation Act of 1986, the articles of incorporation, or the bylaws, provided that the number of members casting votes would constitute a quorum if such action had been taken at a meeting. Voting must remain open for not less than 5 days from the date the ballot is delivered; provided, however, in the case of a removal of one or more directors, a merger, consolidation, dissolution or sale, lease or exchange of assets, the voting must remain open for not less than 20 days from the date the ballot is delivered. Such informal action by members shall become effective only if, at least 5 days prior to the effective date of such informal action, a notice in writing of the proposed action is delivered to all of the members entitled to vote with respect to the subject matter thereof.

2025 Bylaws & Rules Book – Canada

Article 7 - Offenses and Punishment

7.1 Vote Required for Probation, Sanctions, Censure, or Expulsion

The penalties of probation, sanction, censure, or expulsion may be imposed by the affirmative vote of a majority of all members of the board of directors.

7.2 Offenses

Should any member be found by the board of directors to have committed any of the following offenses, the board must consider whether to invoke any of the provisions of this bylaw with regard to the imposition of probation, sanctions, censure, or expulsion:

- (a) failing to submit data as required by the rules;
- (b) filing false or fraudulent data with AAM;
- (c) refusing to allow an auditor of AAM full access at any time to all records as provided by the bylaws;
- (d) failing to pay membership fees or other indebtedness as required by the bylaws;
- (e) violating any bylaw or rule of AAM;
- (f) violating any agreement made with AAM or its subsidiaries;
- (g) dishonest, fraudulent or dishonorable conduct in dealings with AAM or its subsidiaries;
- (h) any act deemed by the board of directors to be detrimental to the interests or welfare of AAM or its subsidiaries; such member may be censured, placed on probation or expelled by the board of directors;
- (i) the release of two consecutive audits wherein the auditor adjusted the circulation data claims by 5 percent or more.

7.3 Charges by a Member

- (a) Any member may file with the board of directors charges against any other member. Charges so filed shall be in writing; they shall specify the offense with reasonable detail and shall be signed by the person or persons making the charge or charges. A copy of such charge or charges shall be served by the managing director upon the accused member, either personally or by leaving the same at the member's business address as registered with AAM, during business hours or by mailing it to said members at said registered business address.
- (b) Said member shall have 10 days from the date of such service to answer the same or such further time as the board in its discretion may deem proper. The answer shall be in writing, signed by the accused member, and filed with the managing director. A copy of said letter shall be sent to the member making the charges.
- (c) Upon the answers being filed, or if the accused shall refuse or neglect to make answer as hereinbefore required, the board shall, at a regular or special meeting subsequent to the close of the 10-day period in which the answer is due, proceed to consider the charge or charges. Reasonable notice of such meeting shall be sent to the accused member; who shall be entitled to be personally present thereat and shall be permitted to examine and cross-examine all the witnesses produced before the board and also to present such testimony defense or explanation as the member may deem proper. After hearing all the witnesses and the member accused, if the member desires to be heard, the board shall determine whether or not the accused member has committed the offense or offenses charged. If it determines that the accused has committed the offense or offenses charged, the board may censure, place on probation or expel such member.

2025 Bylaws & Rules Book – Canada

7.4 Charges by the Managing Director

If at any time the managing director shall have reason to suspect that any member has committed an offense, as defined in Bylaw 7.2, and no action has been taken by any member in accordance with Bylaw 7.3, the managing director shall investigate whether or not there is just ground for such suspicion. If there is just ground for such suspicion, the managing director is authorized to file with the board a written accusation against the suspected member stating specifically the acts or omissions charged. A copy of said accusation shall be served upon such member, who shall be required to answer and a hearing shall be held as provided in Bylaw 7.3.

7.5 Probation

When any member shall have been found by the board of directors to have committed an offense as defined in Bylaw 7.2, and placed on probation, the term of probation shall be fixed by the board of directors. All reports released after the date such member is placed on probation and during the term of probation shall contain in a prominent place thereon a statement that said member is on probation. The statement and the form in which it is made is to be determined by management and shall set forth the designated sections of the bylaws or rules against which offense has been committed and the term for which probation has been fixed. During any period of probation, any use of the AAM insigne must be accompanied by a statement that the publisher is on probation.

7.6 Sanctions

When any member shall have been found by the board of directors to have committed an offense, as defined by Bylaw 7.2, the board of directors may impose any one or more of the following sanctions:

- (a) A notice of application of sanctions may be issued to the membership, indicating the sanctions imposed by the board of directors.
- (b) Circulation data may be excluded from the AAM Snapshot report for a period of one year.
- (c) The publication may be required to undergo six-month audits for a period of two years following the imposition of sanctions.
- (d) The first audit to be released following the imposition of sanctions may be accompanied by a resumption of report services notice, and, if applicable, such notice may make reference to the status of previously released AAM reports.
- (e) A cash fine may be levied against the member.
- (f) The member may be required to submit a plan for corrective action to be reviewed by AAM staff and approved by the board of directors.

7.7 Censure

When any member shall have been found by the board of directors to have committed an offense, as defined by Bylaw 7.2, and is censured the following will occur:

- (a) A notice of suspension of report services will be issued to the membership, indicating that the member is censured.
- (b) Circulation data for a censured member will be excluded from the AAM Snapshot report for a period of one year immediately following the vote to censure.
- (c) All censured publications must undergo six-month audits for a period of two years following the vote to censure.
- (d) The first audit to be released following the vote to censure will be accompanied by a resumption of report services notice, and, if applicable, such notice may make reference to the status of previously released AAM reports.
- (e) A cash fine may be levied against the member.
- (f) The member will be required to submit a plan for corrective action to be reviewed by AAM staff and approved by the board of directors.

2025 Bylaws & Rules Book – Canada

7.8 Expulsion

When any member shall have been found by the board of directors to have committed an offense, as defined in Bylaw 7.2, and expelled, a favorable vote of a majority of all members of the board of directors shall be required to readmit an expelled member. An expelled member shall not be readmitted to membership until all indebtedness to AAM existing at the time of the expulsion is paid; a readmission fee, to be fixed by the board of directors in each case, shall be required.

7.9 Appeal of Board Decisions

Any member who has been censured, placed on probation or expelled by the board of directors may appeal the board's decision at the next meeting thereof. The decision of the board of directors shall remain in full force and effect until the appeal process with the board has been completed.

Article 8 - Appeals

8.1 Appeal to Board of Directors

Any member shall have the right to appeal to the board of directors any decision of the managing director interpreting or enforcing the rules and standards fixed from time to time by the board of directors for the members of AAM and the bylaws or from any action by the management affecting such member.

8.2 Procedure

An appeal from a decision by the managing director or from any action by the management must be filed in writing at the headquarters office of AAM not less than 10 days before the meeting of the board of directors at which the appeal is to be considered and the facts in support of the appeal must be embodied in the communication submitted by the member.

Article 9 - Resignations

9.1 Publisher

A publisher member may tender resignation from AAM by giving notice of such intention to AAM. Such resignation shall be accepted, provided all indebtedness to AAM is paid in full for membership fees up to receipt of resignation notice; and an audit of all released publisher's statements or quarterly data reports subsequent to the last released audit report is completed.

If a publisher does not comply with the resignation requirements of this section, the board shall be advised of staff's intended action including termination of membership.

Any quarterly filing or statement not covered by the last audit of a resigning member shall be removed from the AAM Media Intelligence Center upon processing of the resignation of membership.

2025 Bylaws & Rules Book – Canada

9.2 Advertiser, Advertising Agency and Associate Membership

A member, other than a publication member, may resign by giving AAM notice of such intention and the resignation shall be accepted. Memberships of this class may also be terminated by AAM management for nonpayment of membership fees and services.

9.3 Release of Right to Assets

Termination of membership, for any cause whatsoever, shall operate as a release of all right or title to or interest in the property and assets of AAM.

9.4 Reinstatement of Membership

A member whose membership is terminated for any reason, or by client-initiated resignation, may be reinstated upon satisfying such conditions that resulted in the action taken.

Article 10 - Exceptions

10.1 To Bylaws and Rules

The board of directors or its designated committee may grant a member an exception to the rules, standards or bylaws of AAM. Such exceptions may be granted when in the opinion of the board it would be equitable considering the circumstances of the requesting member and other members who are similarly situated or when, in the opinion of the board, the circumstances peculiar to the requesting member are such that enforcing the rule, standard or bylaw will not accomplish the intended purpose or will work a substantial hardship on the requesting member.

10.2 Procedure

A request for an exception to the rules, standards or bylaws of AAM must be filed in writing by the requesting member at the headquarters of AAM not less than 14 business days before the meeting of the board of directors at which the request is to be considered, and shall include facts and circumstances supporting the request. The request must be signed by the publisher or an individual in executive management (e.g., president, CEO, etc.) other than the circulation executive.

10.3 Vote Required

An affirmative vote of two-thirds of all the directors then present at the board meeting or a unanimous vote by its designated committee at which it is presented shall be required to grant any requested exception to the bylaws, rules or standards of the corporation.

Article 11 - Amendments

11.1 Bylaws in Force

These bylaws shall be and remain in full force and effect unless repealed or amended by the board of directors.

2025 Bylaws & Rules Book – Canada

11.2 Change in Bylaws and Rules

Any amendment to the bylaws and Chapters A and B of the rules shall require the approval of the board of directors by an affirmative vote of a majority of all of the directors then present.

Any changes to Chapters C through F of the rules or report formats may be adopted by the board of directors by an affirmative vote of a majority of all of the directors then present or by the designated committee of the board by the unanimous vote of the members of the committee then present.

Any board member may request that an item considered by a designated committee of the board also be reviewed by the full board of directors.

From time-to-time technical corrections or other edits to bylaws or rules may become necessary as to correct a printing error, amplify, clarify, or otherwise bring rules in conformance with current industry terms and vernacular. In these cases, AAM staff is authorized to amend AAM rules provided that the spirit or intent of the rule is not altered and the AAM board of directors is given 30 days' notice of such changes.

Article 12 - Applicable Law

12.1 Choice of Law

The laws of the state of Illinois shall govern the validity, interpretation, construction and effect of any and all bylaws and rules of AAM. Any litigation between AAM and its members shall be governed by the laws of the state of Illinois.

12.2 Choice of Forum

Any and all claims or suits involving AAM shall be adjudicated in the Circuit Court of Cook County, Illinois, or the United States District Court for the Northern District of Illinois. Each member consents to and submits to the jurisdiction of these courts for this purpose.

12.3 Severability

If any term or provision of these bylaws is held to be void or unenforceable, such term or provision, at the option of AAM, shall be deemed omitted and these bylaws with such terms or provision omitted shall remain in full force and effect.

12.4 Compliance with Law

All members shall have exclusive responsibility to abide by all national, federal, state, provincial and any other governing law. No AAM bylaw, rule, policy, or practice shall be construed as requiring a member to take any action that conflicts with any governing law. AAM shall have no obligation to issue statements of circulation data or other data that do not comply with both the governing laws and AAM's bylaws, rules, policies and practices.

2025 Bylaws & Rules Book – Canada

CHAPTER A: PUBLICITY

(Also see AAM Policy Regarding the Copyrighting of Reports and AAM's Publicity Policy)

A 101.1 General Publicity Rule

No member shall publish or cause to be published, or advertise or cause to be advertised, excerpts from the audit reports of AAM; or publish or cause to be published, or advertise or cause to be advertised, excerpts from AAM standard reports, if the excerpts mention in any way, directly or by implication, the name or authority of AAM, except as is permitted under the rules which follow.

A 101.2 Permissions and Prohibitions

(a) AAM authority may be claimed or implied only for data or statements exactly as they appear in AAM reports and only if these data or statements are identified as to the standard AAM report from which they are taken and the period covered; and only if the data or statements are presented in such a manner as to give the reader the same sense or interpretation as though the report or reports quoted from were before him.

(b) Magazines analyzing nonpaid circulation must clearly differentiate between the paid and nonpaid components but will report a total of these components on AAM reports. Comparisons of AAM data must also clearly identify the components being reported.

(c) In any advertisement or publicity where AAM authority or membership is stated or implied, any figures, data or statements that do not appear in standard AAM reports must be clearly identified as being presented by the author of the advertisement or publicity and AAM authority must neither be claimed nor implied for them.

(d) In any situation where a publisher elects to make an announcement regarding the results of an AAM audit report in advance of the actual publication and release of the audit by AAM, the publisher member must identify any/all adjustments to circulation that are to be reported in the audit as having been calculated based on AAM auditors' findings.

(e) Any AAM data used in making comparisons must be from comparable types of reports, comparable circulation classifications, and for identical periods. Data from current publisher's statements may be compared with audited circulation for the preceding corresponding period. In any comparison between publications, data must be compiled from like reports and circulation classifications, sourced as required by A 101.2(a) and (c) of the rules.

(1) Business publication members may use AAM data to make comparisons for different publisher's statement periods under the following conditions:

(a) The data must be sourced to the most recently released publisher's statement for all publications involved in the comparison.

(b) The publisher's statement for the member making the analysis must be current.

(c) All documents must clearly identify the time periods covered by the publisher's statements being referenced in the comparison.

(d) All other aspects of Rule A 101.2 are applicable.

(2) When comparisons between newspapers are made, comparable data elements must be used. Circulation reported by day-of-week can only be compared across same identical days (Monday to Monday, Tuesday to Tuesday, five-day average to five-day average, etc.).

2025 Bylaws & Rules Book – Canada

(f) When a newspaper compares its circulation to that of other newspapers, the comparison must clearly identify the individually paid and other paid circulation components, or must only make comparisons of the total individually paid circulation and other paid circulation.

If a comparison is made of total distribution only, it should identify that the figures include paid and other circulation. Total distribution may not be compared to paid circulation only. Newspapers that opt to analyze other circulation may not compare their total distribution to only the paid circulation of a newspaper that elects not to provide the optional analysis.

(g) When a Canadian newspaper compares its circulation to that of other newspapers, the comparison must clearly identify the paid and other circulation components. If a comparison is made of total circulation only, it should identify that the figures include both paid circulation and other circulation. Total circulation may not be compared to paid circulation alone.

(h) If data from out-of-date standard AAM reports are shown, comparable data from the latest similar reports must be shown.

(i) Members of AAM shall not reproduce in any way any communications issued by or from AAM or excerpts thereof unless direct permission has been given by the management or board of directors.

(j) Publisher members under suspension of service may publish claim of membership only if in connection with each such claim the words "under suspension of service" are added.

(k) The membership insignia, designed for members and authorized by the board of directors, may be used by any member in good standing on letterheads, advertising matter or any other place where the phrase, "Member of the Alliance for Audited Media" is legitimate.

(l) AAM members are permitted to reproduce AAM reports for their own publication. However, no modification of the AAM report is allowed; the reproduction must be completely faithful to the original both in terms of the information presented and the report format (including the color of the report). No AAM member shall distribute information concerning other AAM members in a form substantially similar to the appearance of a standard AAM report. With the exception of the parameters set forth above, no member shall distribute information in a form imitative of the appearance of a standard AAM report.

(m) Except with prior written approval of AAM, members or applicants may not refer to AAM bylaws & rules or procedures with respect to reports which are not prepared by AAM.

(n) After a publisher has submitted circulation data, and its receipt has been acknowledged by AAM, the publisher may publicize the figures from the statement provided the figures, wherever used prior to the release by AAM of the figures in the Snapshot report or in the statement are accompanied by the following qualification: "As filed with the Alliance for Audited Media, subject to audit."

(o) A publisher applicant, upon acknowledgement by AAM of receipt of both application and initial audit deposit, may publicize the fact of application only for a period of one year from the date the application was received. In the case of newly launched publications, where application has been received prior to the publishing of its initial issue, the fact of application may be publicized for a period of one year following the cover date of the first issue.

(p) The conditions and provisions contained in all references to publishers and all other conditions and provisions in these publicity rules shall be applicable to associate publisher members.

(q) While nothing contained in this article should be construed as prior restraint as it pertains to news stories claiming AAM authority for information excerpted from its reports, this provision does not exempt the member from compliance with all other provisions of this article.

(r) Participants in AAM's Reader Profile and Subscriber Profile services may publicize results of their studies prior to the release of the final audit document provided final researcher tabulations and/or reader information has been submitted to AAM for verification, and provided all such publicity notes that the findings are subject to final audit results.

2025 Bylaws & Rules Book – Canada

A 101.3 Violation of Publicity Rules

(a) In the case of a breach of observance of any of the publicity rules, the managing director may call upon the offending member to abandon the act or practice which is a breach. In addition, a bulletin may be issued, said bulletin to be so worded that members may have proper knowledge of the offense (the details of the offense shall not be given if the injury supposed to have been done would be aggravated thereby). The provisions of this paragraph shall not be mandatory upon the managing director. Distribution of bulletins announcing publicity violations shall be limited to members only for internal use and shall not be supplied to members for redistribution.

(b) If, in the opinion of the managing director, the seriousness of the breach of observance of any of the publicity rules of this Chapter A so warrants, the managing director may immediately prefer charges against the offending member or such charges may be filed by any member who feels injured thereby as provided in Article 7 of the bylaws.

2025 Bylaws & Rules Book – Canada

CHAPTER B: ALL PUBLICATIONS

Article 101 - General

B 101.1 File Copies, Subscription Promotion Offers

Publishers shall maintain on file for the use of the auditors copies of all subscription offers, either as advertised in their own or other publications, or sent out in the form of circulars, or presented on radio and television, or any other electronic medium; copies of the scripts and visual presentations should be available; also copies of all contracts made with solicitors, canvassers, subscription agencies, or any other parties through whom subscriptions are obtained for their own publications.

B 101.2 International Editions

Copies of international editions served may be included in the circulation data, provided the international editions carry all advertising scheduled for and appearing in the United States and/or Canadian editions, but the average number of copies sent by mail or sold through dealers to international countries shall be stated and explained in the paragraph of the AAM reports devoted to general explanations.

Copies of international editions of consumer magazines, business publications and farm publications served that do not contain all advertising copy appearing in the United States and/or Canadian editions (except by special arrangement) shall not be included in the circulation figures, but may be shown and explained in the paragraph of AAM reports devoted to general explanations.

Copies of international editions of newspapers served that do not contain all advertising copy appearing in the United States and/or Canadian editions may be included in the circulation figures with reporting governed by the branded edition provisions of Rule C 102.3 Separate Editions.

B 101.3 Advertising Omitted

If some copies of a publication credited as circulation differ from the rest of the copies in that some national advertising appearing in the publication has been omitted from a certain edition or a certain portion of the copies distributed, it shall be noted in paragraph 1 and explained in the paragraph devoted to general explanations. The provisions of this rule shall not be interpreted as applying to occasional, emergency or authorized omissions of advertisements or to the omission of advertising it is unlawful to print in certain states and provinces.

B 101.4 Congregation-Wide Subscriptions of a Religious Publication

A religious publication shall be judged to be one primarily concerned with religion in purpose and/or content. It must be recognized by fellow religionists as a religious publication. It must be recognized as religious by some official or standard published list.

Congregation-wide subscriptions are those subscriptions of a religious publication obtained under a plan whereby members of a religious congregation receive the publication, the subscriptions are paid with church funds, special or regular collections, assessments or contributions.

These subscriptions shall be set forth in paragraph 1 as "Subscriptions: Congregation-wide." Subscriptions so reported shall qualify as paid subscriptions, provided they conform to AAM rules defining paid circulation in all other respects.

A complete explanation of such subscriptions and the plan or plans under which the subscriptions are paid shall be shown in the paragraph devoted to general explanations in publisher's statements and audit reports.

2025 Bylaws & Rules Book – Canada

Article 102 - Audits

B 102.1 Member Obligations

An AAM audit is designed to provide a high degree of assurance that an AAM member-publication's circulation, as well as all other information contained in its AAM audit report, is fairly stated in all respects material to average paid and analyzed nonpaid circulation.

AAM publisher members are responsible for all information disclosed in their circulation data submissions and audit reports, and are obligated to comply with Bylaws 2.8 Publisher Duty to Install and Maintain Records and Bylaw 2.15 Access to Records. These bylaws state that the publisher is also responsible for the accuracy, completeness and accessibility of records maintained by agents, their subagents, distributors and other third-party suppliers.

Publishers must cooperate fully and in a timely fashion with AAM auditors in providing accurate records and information in connection with inquiries that arise during the audit process.

All AAM report services will be suspended when the AAM auditor cannot present final audit findings within six months of the audit period, if the delay is caused by the failure of the publisher (or its agent, their subagents, distributor or other third-party supplier) to respond in a timely fashion to requests for records. Report services will be resumed once the necessary documentation has been provided.

B 102.2 Continuous Assurance Program

Publishers may on an optional basis participate in the Continuous Assurance Program (CAP). To qualify for participation, publishers must:

- (a) Maintain AAM Digital Publisher Audit status
- (b) Maintain current data submission status
- (c) Maintain current audit status

Adhere to all other applicable bylaws and rules.

B 102.3 Audit Report Contents and Differences

(a) If, in the judgment of the managing director, there are any significant differences between the total paid circulation as shown in the audit report and that shown in publisher's statements, the differences shall be explained in the audit report.

(b) The quarterly averages for the period audited shall be shown in the audit report, together with the quarterly averages for the three immediately preceding years. (The provision requiring quarterly averages for the three immediately preceding years does not apply to business publications and consumer magazines.)

(c) Advertising statistics and information shall not be included in audit reports.

Nothing in this paragraph shall be interpreted as conflicting with the rule requiring that variations in the advertising content be explained, or any other rule requiring specific explanation.

B 102.4 Request Change of Auditors

In case a publisher objects to the auditor assigned by AAM to audit the publication, the publisher shall state fully the objections. If such objections are deemed by AAM to be sufficient another auditor shall be substituted.

2025 Bylaws & Rules Book – Canada

B 102.5 Time of Making Audits

See also C 104.1 for newspapers.

- (a) Publisher's circulation claims shall be subject to audit once a year, except in such cases as otherwise specified under the rules.
- (b) Publisher's circulation claims for those participating in the Continuous Assurance Program (CAP), shall be subject to audit once every 24 months.
- (c) In situations where a newspaper changes audit period or other circumstances result in an audit covering a period longer than 12 months, the audit report shall show the averages for the last 12 months of the period and separate averages for the additional period. This section is not applicable to CAP participants, daily newspapers with average weekday paid circulation of 50,000 copies per issue or less audited every 24 months, community newspapers, weekly newspapers audited every 24 months, and weekly newspapers under the group audit plan.
- (d) Canadian daily newspapers with an average weekday paid circulation between 50,001 and 75,000 copies per issue may be audited every two years subject to the requirements of Rule C 104.1 in Canada.

B 102.6 Initial Audit

See also C 104.2 for newspapers;

D 103.1 for business publications;

E 103.1 for farm publications; and

F 103.1 for magazines.

For the purpose of initial audit there shall be filed with AAM:

- (1) Copy of the current issue of the publication.
- (2) AAM's circulation record analysis blank filled out and signed.
- (3) Certification that the basic subscription price has been printed regularly in the applicant's publication during the period to be audited. See B 102.11.
- (4) Complete list of all prices, besides the basic subscription price, offered during the period to be audited. In case no record is available to indicate a public announcement of such established prices, the price reported in the initial audit report as the basic price shall be the highest price at which subscriptions were found to have been taken for the class of business designated.

B 102.7 Audit Report Submitted to Publisher

A proof copy of the audit report shall be submitted to the publisher at least 10 days prior to its publication and distribution to members, unless the publisher elects not to receive proofs. The publisher shall make no use of any part of such report until it has been released by AAM to its members.

B 102.8 Costs

The entire cost to AAM of any audit, together with the cost of any necessary investigation or any other additional expense or cost incurred by AAM at the request of or pertaining to the obligations of a publisher member shall be charged to the publication or publications involved. The cost of a special investigation made under the provisions of 4.7 of the bylaws shall be paid by the publisher members involved as determined by the Special Investigation Committee created under the provision of said bylaw. In case of costs other than the audit and necessary investigation, the publisher shall be notified that a separate charge will be made for the additional work, prior to AAM taking action in that regard.

2025 Bylaws & Rules Book – Canada

B 102.9 Variations from Publisher's Statement

When an audit shows variations from the data contained in the publisher's statements for the period audited, AAM shall:

- (a) Make available to publisher all data (specific facts and not simply the general nature and type of facts) upon which the adjustments were made.
- (b) Instruct auditors to take the initiative in informing the publisher as to the specific facts that have led to the deduction.
- (c) If the publisher believes that the data so furnished is inadequate to justify the proposed deductions, an appeal may be made to the managing director and in the event of dissatisfaction with the managing director's decision, the publisher may appeal to the board of directors.
- (d) If an audit report shows discrepancies of more than 3 percent between the auditor's findings and the publisher's statements for the period audited, the subsequent two publisher's statements released after the audit shall repeat from the last preceding audit report the paragraph that sets forth the facts concerning said discrepancies.
- (e) When an audit has shown adjustments in publisher's statements exceeding 5 percent, the facts and circumstances shall be reported to the board of directors for such action as the board may determine.
- (f) When two consecutive audits have shown adjustments exceeding 5 percent, the audit report will contain a prominent notice on its front page reporting this condition, as will the subsequent two publisher's statements released after the audit.

B 102.10 Prices Incorrectly Reported

Any discrepancy between prices reported in a publisher's statement and prices published in the publication during the period for which the publisher's statement was made shall be noted in the audit report.

B 102.11 Publication of Basic Annual Price

The auditor shall satisfy him/herself that the basic annual subscription price (publisher's suggested annual subscription price), or in the absence of a basic annual subscription price, the basic price for the next longer term for which a basic price has been established, has been published in the publication regularly during the period being audited or audit shall not be made. Where no basic annual subscription price has been established by a publication a pro rata of the basic price for the next longer term shall be used by AAM in determining the validity of all subscription offers.

B 102.12 Recalling Audit Report

If an audit report, subsequent to its release by AAM, is found to be incorrect in any material degree, or if the managing director has reason to believe that such audit report is incorrect in any material degree, the managing director, in either event, may recall such audit report. In the event that an audit report is recalled a bulletin to that effect shall be sent to the members and to directories using such audit report.

B 102.13 Reaudit Requests

If a publisher member questions the accuracy of the publication's audit report or that of any other publication in the same class, the publisher shall have the right to a reaudit, provided request for such reaudit is made within 10 days of receipt of proof copy of the audit report or within 15 days of issuance in the case of another publication and provided, further, such publisher member furnishes satisfactory evidence that such request is warranted. Such reaudit shall be made by another auditor selected by AAM.

2025 Bylaws & Rules Book – Canada

B 102.14 Reaudit Costs

(a) Publishers requesting a reaudit shall deposit with AAM at the time such request is made an amount equivalent to the estimated cost of the reaudit as determined by the managing director.

(b) In the event the reaudit shows a total average circulation within 3 percent of that shown by the original audit, the petitioner shall pay the cost of the reaudit; otherwise the sum deposited shall be returned to the petitioner.

(c) In the event such re-examination proves that the publication has misstated its circulation to AAM, either through false or incorrect statements or by employing a method of keeping its records tending to mislead the auditor, or both, the expense of reaudit shall be borne by the publication reaudited.

B 102.15 Variation Report

AAM may issue a periodic report showing the variations in circulation, if there is a 3 percent negative variance, as reported in audit reports released during a calendar quarter and the publisher's statements for the period audited. The contents of the report may include but not be limited to: the audit period; total average circulation as reported in publisher's statements; total average circulation in audit report; difference in number of copies; percentage difference; rate base; difference in number of copies between rate base and audit report; percentage difference between rate base and audit report; and other data subject to approval of the board of directors.

Article 103 - Publisher's Statements and Quarterly Data Reports

B 103.1 Publisher's Statements and Quarterly Data Reports

(a) Publisher members shall not in any manner make public their publisher's statements or quarterly data reports previous to release by AAM except as provided for in A 101.2(m).

(b) When a current released publisher's statement or quarterly data report is shown by audit, or, otherwise, to have been incorrect in any material degree, the managing director may recall such publisher's statement or quarterly data report. In the event that a publisher's statement or quarterly data report is recalled, a bulletin to the effect shall be sent to the members and to directories using such statements.

(c) Publisher members who desire to comply with the request of an advertiser or advertising agency member may furnish interim statements of circulation. These statements shall be released to members in the same manner as regular publisher's statements.

B 103.2 Time Limit for Filing Publisher's Statements or Quarterly Data Reports

Publisher's statements and quarterly data reports shall be submitted to AAM after the close of the period covered as follows:

Daily newspapers	15 days
Weekly newspapers and newspapers under 30,000 paid circulation (opting to utilize the format dedicated to this class of member)	20 days
Farm publications	One month
Magazines	One month
Business publications	One month

(a) For newspapers, if the quarterly data is not filed within the period indicated above and no valid reason is given for noncompliance, the procedure shall be as follows:

2025 Bylaws & Rules Book – Canada

(1) Fifteen business days following the deadline, a notice that the member's issue data is past due will appear on the filter page within AAM's Media Intelligence Center.

(2) Newspapers that are noncompliant for two quarters, and no valid reason for not submitting the data has been provided, shall be brought to the attention of the board of directors. In addition, the membership may be terminated.

(b) For farm and business publications, if the data is not filed within the period indicated above and no valid reason is given for noncompliance, the procedure shall be as follows:

(1) In conjunction with the release of the Snapshot report, a bulletin shall be issued to all members, informing them that the data is due but not received.

(3) If the data has not been filed by the tenth day of the fourth month following the close of the period, the matter shall be brought to the attention of the board of directors. In addition, a bulletin may be issued by AAM informing membership that the data is due but not received and that the previous released data is out-of-date.

(c) For magazines, if the required data is not received within the period indicated above and no valid reason is given for noncompliance, the procedure shall be as follows:

(1) In conjunction with the release of the Snapshot report, a bulletin shall be issued to all members, informing them that the data is due but not received.

(2) In conjunction with the release of the supplement to the Snapshot report, a subsequent bulletin shall be issued to all members, informing them that the data has still not been received and that the previous released data is out of date.

(3) If the required data or valid reason for not submitting it has not been received prior to the end of the third month following the close of the period, a membership notice shall appear on the electronic posted statements noting no data has been received. If the outstanding data has not been received by the seventh month following the close of the period, the membership may be terminated.

B 103.3 Publisher's Data Submissions - Conform to Audit

(a) If at the time a publisher's data submission is ready for release the auditor's findings for the period covered by the statement are available, the auditor's findings shall be placed at the publisher's disposal and the publisher's data submission shall be made to agree with those findings before being released.

In addition, the adjustments proposed by the auditor and made by the publisher shall be reported in the explanatory paragraph of the data submission.

(b) If the publisher declines to sign such statement, either because the publisher questions the accuracy of the findings of the auditor, or for any other reason, AAM shall issue a special statement for that period, in agreement with the findings of the auditor. This statement shall be in all respects in the same form as the regular data submission except instead of the words "Subject to audit by the Alliance for Audited Media" shall be substituted the words "This statement has been verified by the Alliance for Audited Media."

(c) The publisher may appeal to the board of directors in protest against the issuance of the special statement and such appeal, if filed within one month from the close of the period involved, shall serve to arrest issuance of the special statement and of the audit report until the board shall have made its decision. In case of such appeal a bulletin shall be issued saying: "Release of publisher's statement for the period ended (date) and of audit report for the period ended (date) has been automatically postponed by appeal of the publisher to the board of directors."

(d) A publisher's data submission for a period subsequent to a period for which an audit has already been made must take into consideration, and be in agreement with, facts which have been established by the auditor as to conditions during the subsequent publisher's data

2025 Bylaws & Rules Book – Canada

submission period. If the managing director has reason to believe that such publisher's data submission is not in agreement with the facts thus established, the statement shall not be released until it has been corrected. In the case of a publisher's refusal to submit a corrected statement, all the facts shall be submitted to the board of directors for review.

(e) When, as a result of the making of an audit or a special investigation, AAM shall be unable to complete an audit report of a publication and to release the same for publication and distribution to members within four months after close of the period to be covered by such audit report, the publisher's data submission of such publication for the period following that to be covered by the audit report shall be released only after being reviewed and authorized by the managing director.

B 103.4 Purpose and Content of General Explanatory Paragraph

(a) The paragraph in AAM reports reserved for general explanations is designed for the sole purpose of amplifying or explaining the data given in the specific paragraph on a given subject when such specific paragraph is too limited in space to allow adequate covering of the subject.

Nothing shall be allowed in the general explanatory paragraph in way of data, facts or statements pertaining to advertising nor any competitive, comparative or advertising propaganda. AAM shall have the right to edit and censor without recourse.

(b) No analysis or breakdown of unpaid distribution shall be allowed in the paragraph reserved for general explanations except for publisher's data submissions and audit reports issued for members analyzing nonpaid circulation, more fully described in Chapters D, E, F and/or reporting "Other Distribution, Back Copies" as described in Rule F 107.2. In addition, unpaid circulation for newspaper members may be reported in the general explanatory paragraph. No reference shall be made in said paragraph to anything happening after the period covered by the publisher's statement.

(c) Nothing in this paragraph shall be interpreted as conflicting with the rule requiring that variations in the advertising content be explained, or any other rule requiring specific explanation.

(d) In cases where a publisher does not answer the questions contained on the statement form requiring specific and actual data, the publisher shall not be permitted to give approximate or partial data in answer to such questions in the paragraph of AAM reports devoted to general explanations.

B 103.5 Snapshot Reports

(a) Except for newspapers, AAM may issue reports summarizing selected data from publisher's statements filed with AAM. The contents of the reports may include but not be limited to paid circulation averages, occupied household data, ratio of circulation to occupied households and other data subject to the approval of the board of directors.

(b) Except for newspapers, average circulation figures filed in semi-annual publisher's statements shall be reported in Snapshot reports.

B 103.6 Amended Publisher's Data Submissions

Until the deadline (see Rule B 103.2) for filing the next publisher's data submission, a publisher may request that AAM issue an amended statement, if revisions are necessary, and there are no findings related to an audit.

B 103.7 Publisher Circulation Accounting Methodology

Circulation accounting methodology used by publishers in the calculation of circulation claims must be consistent through the reporting period unless approved in advance by AAM. As examples: the methodology employed to determine subscriptions cancelled for nonpayment (average or actual) must be consistent over the entire audit period; the methodology employed for applying returns for day-of-week reporting (weighted or actual) must be consistent over the entire audit period.

2025 Bylaws & Rules Book – Canada

Article 104 - Miscellaneous

B 104.1 Subscriptions

Subscriptions more than three months in arrears shall not be included in paid circulation but shall be included in nonpaid distribution.

B 104.2 International Subscriptions

Subscriptions from countries outside of U.S. and Canada and the West Indies may be included in paid circulation provided they are not more than six months in arrears and provided that in all other respects they meet AAM's definition of a paid circulation subscriber.

B 104.3 Dealer Accounts

That portion of a retail dealer, agent or distributor account that is over three months in arrears does not meet AAM's definition of paid circulation and is ineligible for inclusion in paid circulation. The publisher must include this circulation in nonpaid distribution along with a brief description in the explanatory paragraph of AAM publisher's statements and audit reports.

B 104.4 Checking Copies

One copy sent to an advertiser for checking purposes and all copies sent to advertising agencies for checking purposes shall be considered as checking copies to advertisers and advertising agencies. (See Bylaw 2.12.)

B 104.5 Net Cash Received for Subscriptions

Information showing the net total cash which is received for subscriptions shall not be shown in AAM reports.

B 104.6 Lost, Missing, Damaged, and Unsold

Lost, missing, damaged or other unsold copies shall be classed as returns and deducted as returns.

B 104.7 Bonuses, Allowances, and Limitations of Returns

When a publisher provides bonuses, allowances, salaries, rebates or price differentials to or through agents, distributors, wholesalers, independent contractors or other third parties, or when a publisher limits the number of returns it will accept, the publisher must maintain and provide AAM auditors with auditable records so that the auditors can determine whether or not the circulation was generated in compliance with the rules defining paid circulation. Auditable records include, but are not limited to, periodic surveys (quarterly or more frequently) of nonreturn or limited-return accounts, and documentation that credits were not intended to reimburse carriers for copies that were either not sold or that did not meet the AAM definition of paid circulation.

B 104.8 Employment of AAM Auditors

See also C 108 for newspapers.

If, within 12 months after the release of its audit, a publisher member employs or contracts to employ one of AAM's auditors, or any other employee of AAM who directly participated in or reviewed that member's audit, AAM shall conduct a reaudit or review of the audit, for the same period as covered by the prior audit. The publisher hiring or contracting to hire such person shall pay for such reaudit or review.

2025 Bylaws & Rules Book – Canada

B 104.9 Field Served

The "Field Served" statement in AAM reports shall be a description of the field and shall exclude statements of a promotional nature. It shall be subject to edit by the managing director.

B 104.10 Reports Furnished to Publisher Members

A publisher member shall receive without charge a digital copy of their own reports.

B 104.11 Notifications on Violations

All notifications issued and distributed to members by AAM, involving the breach or violation by a member of the rules, standards and bylaws, are for information and internal use only of members.

2025 Bylaws & Rules Book – Canada

CHAPTER C: NEWSPAPERS

Article 101 - Paid Circulation

C 101.1 Paid Circulation Defined

Paid circulation is hereby defined to be subscriptions and single-copy sales of newspapers which have been individually paid for by the purchasers, not for resale, at not less than one cent per copy or per subscription, net of all other considerations, wherein the primary objective of the transaction was the purchase of the newspaper. Subscription enhancements such as access to newspaper archives and/or other benefits originating from the same editorial home and consistent with the newspaper's primary business objectives shall not be considered when determining qualification status.

For purposes of defining paid circulation, the phrase 'net of all considerations' means that the purchaser has paid a qualifying price for the single copy or subscription in addition to the value of any other product or service bundled with the subscription or single-copy offer. For example, an offer of a subscription that includes an inducement of free movie tickets valued at \$6.00 would require the consumer to pay \$6.00 plus a qualifying amount for the subscription in order for the sale to qualify as paid circulation.

(a) Subscriptions may be served for no longer than four consecutive months, immediately following the expiration date and such arrears may be included in paid circulation.

(b) Only the copies specifically included in the contractual agreement will qualify for inclusion in paid circulation.

(c) A gift subscription shall be considered one, which is given as a normal expression of friendship and which does not promote the business or professional interests of the donor. To qualify, gift subscriptions must be sold at qualifying prices and a single donor may not be responsible for more than 50 subscriptions.

(d) Subscriptions acquired through the redemption of accrued award credits or loyalty points associated with bona fide programs (e.g., frequent flyer miles, credit card member points) may qualify as paid circulation if the publisher presents satisfactory evidence that the cash value of the redeemed product or service is equivalent to one cent, the program clearly defines how points may be earned, the purchaser is provided with alternate purchase options and is required to take an overt action to redeem the points.

(e) In all other scenarios wherein the recipient does not pay for the subscription or single copy, or the purchase of the subscription or single copy is not the primary objective of the transaction, the copies shall be reported as Qualified Circulation except as specifically outlined in other AAM rules.

C 101.2 Prices

Basic price is defined as the price at which the print and/or digital edition of the publication may be purchased by anyone at any time. For AAM reporting purposes, publisher members must establish a single-copy basic and an annual basic price for each frequency of delivery available to consumers. These basic prices must be regularly published within the publication (at least quarterly) and the publisher must be able to demonstrate current and ongoing sales at these prices.

C 101.3 Combination Sales

When two or more different publications (newspapers, magazines, business publications, farm publications) are offered for an amount less than the total of the basic prices of all the publications, these sales are defined as "forced" combinations and are subject to the following conditions.

2025 Bylaws & Rules Book – Canada

(a) Single-Copy Sales

When each of the publications offered in the combination sale intends to qualify the distribution as paid circulation it must be made known clearly to the purchaser that each of the publications can be purchased individually at the same price as if purchased as part of the group.

The combination package must be priced so that both of the following guidelines are observed:

(1) Newspapers sold in combination may be included in paid circulation provided that the minimum qualifying price of each publication is collected.

(2) When a combination package is offered on a single-copy basis, three purchase options ("stacks" of publications) must be made available at all retail locations, including vending machines: the combination package itself plus each publication included in the combination package separately. A qualifying purchase price for the combination would be at least the selling price of the highest priced publication plus one cent for the second publication.

Example: The basic price for Publication A is \$1.00 and for Publication B is \$1.00, and the combination price must be at least \$1.01.

(b) Subscriptions

(1) An affirmative act on the part of the subscriber is required and an option must exist to pay an incremental amount for the additional subscription or to take a reduction in the amount paid if the additional subscription offer is declined.

When an option to opt-in/opt-out does not exist, any promotional materials cannot imply or suggest that the add on publication is "free," "at no additional cost," or use of similar language.

(2) In situations where a digital edition of a newspaper is offered in combination with another newspaper's print and/or digital edition at no incremental charge, the copies of that digital edition may be reported as qualified under the following conditions:

(a) The copies reported meet the qualification criteria as defined in Rule 105.1(b) Subscriptions Involving Digital Editions.

(3) Multiple Subscriptions to One Newspaper

Any offer of two or more subscriptions to the same newspaper must include an option to receive only one subscription for less than the multiple subscription price. For example, an offer of two subscriptions for 10 cents must also make one subscription available for nine cents or less.

The rule is not applicable to situations where digital edition issues are provided to print subscribers and only the print edition subscription is to be reported as paid circulation. (See also C 105.1 Subscriptions Involving Digital Editions)

(c) Newspapers Distributed Together

A newspaper with less than seven-day frequency can distribute copies of another newspaper on no more than two days per week when the host paper does not publish by establishing a basic price for this service, provided copies are paid for in accord with C 101.1 and subscribers are given the opportunity to opt-out. If a digital edition is to be utilized as the publication distributed on nonpublishing days of the host newspaper, subscribing households must register and activate the digital edition service.

Article 102 - Circulation Reporting

C 102.1 Circulation Averages

All AAM reports include a calculation of average circulation for the Saturday (or Sunday) or weekend issue, a weekday average chosen at the publisher's discretion and optional "Power Day." Newspaper may also report circulation average by day of week on an optional basis. These averages will be presented in the following manner, and as applicable:

- Paid for by individual recipients (individual subscriptions and single copy)
- Paid business/traveler circulation (group subscriptions plus guest refund based and purchased by hotel copies)

2025 Bylaws & Rules Book – Canada

- Qualified circulation

In those instances where a newspaper is required to report separate data for either digital or affiliated publications (see Rules C 102.3 Separate Editions and Affiliated Publications and C 105.1 Subscriptions Involving Digital Editions, an executive summary of the circulation will be reported as applicable:

- Average for member newspaper
 - Print
 - Digital
- Average for affiliated publications

As applicable, averages will be presented in subsidiary paragraph(s) for each category — print, digital and affiliated publications — in the following manner:

- Paid for by individual recipients (individual subscriptions and single copy)
- Paid business/traveler circulation (group subscriptions plus guest refund based and purchased by hotel copies)
- Qualified circulation

C 102.3 Separate Editions and Affiliated Publications

(a) The circulation of a separate edition of a member newspaper or affiliated publication may be included in the total average paid and qualified circulation of the member in AAM reports and databases, subject to the following conditions:

(1) The member newspaper must identify the same city or cities of publication in the front-page logotype or running date line of all editions.

(2) Print affiliated publications are any other print publications containing editorial and/or advertising content, excluding newsletters, which are published at least weekly.

If an affiliated publication is published less than weekly, the circulation may be shown on AAM reports, but not included in any circulation averages associated with the member newspaper.

Newspapers reporting on the Community Newspaper Audit format may not report affiliated publication circulation separately.

(3) All digital editions and affiliated publications will be reported separately in appropriate paragraphs of AAM reports and databases:

- Digital editions must be consistent in character and content and editorially homogenous with the member newspaper. The advertising content of digital editions may differ from the print newspaper.
 - Replica editions must contain the ROP advertising schedule for the primary print edition for the day and may include undated editorial content.
 - Nonreplica editions must contain a clear and concise reference, such as an “edition of,” “produced by,” etc. to the host print newspaper. The explanatory paragraph of AAM reports and databases will carry a description of any qualified digital edition service.
- Affiliated publication digital editions must be consistent in character and content and editorially homogenous with the member newspaper. The advertising content of affiliated publication digital editions may differ from the print newspaper.
- The explanatory paragraph of AAM reports and databases will carry a description of any qualified affiliated publication digital edition service.

Digital edition circulation eligible for paid or qualified reporting is limited to restricted access digital editions and do not included public access websites.

(b) Newspapers that sell regional advertising separately may report the average distribution for each regional portion in the explanatory paragraph of AAM reports.

2025 Bylaws & Rules Book – Canada

(c) Any edition issued in addition to the regular editions as the result of unanticipated activity and which is published more than an hour before or an hour after the normal press schedule shall be considered an “extra.” The last regular press schedule of the day in a previous week corresponding to the day on which the extra is run shall be considered the normal press schedule.

- (1) To qualify as paid circulation an extra of a daily newspaper must be sold at qualifying prices and comply with paragraph (a) of this rule.
- (2) The sales of extra editions shall be included in the circulation of the day for which they are dated. Extra editions of weekday newspapers issued under Sunday date lines shall be included in the circulation for the following Monday.
- (3) A complete explanation shall then be included stating the occasion for the extra editions, the number of sales made for each extra edition, the average for the period affected, whether all advertising was carried, and if not, the extent to which it was.

C 102.4 Days Omitted from Averages

(a) Newspapers may omit certain days from the calculation of their average net paid print and digital circulation when net paid circulation on those days differs from the previous corresponding day by at least 5 percent.

Example: A newspaper wants to eliminate Thursday, August 11. The net paid circulation for that day was 100,000. The net paid circulation the previous corresponding day (Thursday, August 4) was 107,000. Because the difference between the two days' circulation exceeds 5 percent ($7,000/107,000 = 6.54\%$), August 11 is eligible for omission from AAM's circulation averages.

A newspaper reporting paid affiliated publication circulation may elect to omit certain days of only the member newspaper or any paid affiliated publication separately using the above criteria (circulation of an affiliated publication compared to the corresponding day of the same affiliated publication, etc.)

A newspaper reporting qualified affiliated publication circulation may elect to omit certain days of only qualified affiliated publication circulation at their discretion. The omitting of qualified affiliated publication circulation shall have no impact on the ability to omit days from their calculation of net paid circulation.

(b) Requirements

- (1) A maximum of 10 omitted days is allowed within a 12-month period. The omission of any day(s) for an affiliated publication, whether paid or qualified, will each be considered as one of the maximum of 10 days allowed.

(c) AAM Reports

When there are days that are omitted from the average reported, the circulation and the reasons for omission will be reported separately for each day in the explanatory paragraph.

C 102.5 Distribution Area Maps

All newspaper members may, at the option of the publisher, include a map showing the current designated distribution area in their Brand View.

C 102.6 Weekly Newspaper Group Audit Plan

In order to qualify for the group audit plan, the weekly newspapers involved must meet the following criteria:

(a) Each newspaper in the group shall qualify for AAM membership in accord with the bylaws defining membership.

(b) Advertising shall be sold in combination for all newspapers.

(c) The initial audit of a weekly, semiweekly or triweekly newspaper shall cover a period of at least three months ending with any calendar quarter. Audits thereafter shall be scheduled at least once every two years for urban weekly newspapers and at least once every four years for

2025 Bylaws & Rules Book – Canada

nonurban weeklies. The managing director shall determine after consultation with the publishers in the group the period to be covered by each regular audit.

(d) Group quarterly data reports showing circulation data for individual newspapers as well as total circulation for all newspapers in the group shall be issued for the semi-annual periods.

Article 103 – Qualified Circulation

C 103.1 Qualified Circulation

(a) Home Delivery – Address Specific

Copies delivered to households may be reported as: Qualified Home Delivery – Address Specific under the following conditions:

1. Households targeted for delivery are notified on the first day of delivery.
2. Notification includes anticipated dates of delivery.
3. Notification must include options for household members to contact the publisher to opt-out of delivery.

Publishers must maintain route lists of all address specific programs and, if required by the auditor, provide copies to AAM at least two weeks prior to the commencement of a program. Failure to provide requested audit documents will result in the exclusion of the copies from qualified circulation claims.

(b) Home Delivery – Market Coverage

Copies delivered to households may be reported as: Qualified Home Delivery – Market Coverage under the following conditions:

1. Distribution area is defined by maps or other means.
2. The quantity of households within defined delivery area must be defined and available for the auditor's review.
3. Carrier/distributor delivery manifests/proof of payment reconcile to copies reported.

(c) Public Place Access Distribution

In addition to employee (print or digital) and education program (print or digital) copies, distribution to the following venues may be included in qualified circulation, provided the publisher maintains specific records regarding the location's address and volume of copies distributed for each issue.

- Hospitals and nursing homes
- Restaurants
- Doctor/dentist offices
- Other public place locations (e.g., barber shops, salons, retail locations, honor boxes, etc.)
- Airlines

- (1) Multiple copies distributed to public places, which are not controlled by the publisher nor supported by detailed publisher records, for redistribution to consumers shall be analyzed as public access distribution. Examples of such distribution might include, but are not limited to: common entryways of apartment complexes, street racks, and retail establishments where distributors control the venue and volume of copies distributed.
- (2) AAM reports shall show copies distributed to designated areas but make no inference as to their final disposition.

No other single-copy distribution, advertising checking copies, service copies, etc. are eligible to be reported as qualified circulation.

2025 Bylaws & Rules Book – Canada

C 103.2 Other Qualified

A newspaper may include in average qualified circulation copies served (or made readily available for pick up in the normal work environment by) to employees, retired employees, correspondents and agents under the following parameters:

(a) To be classified as an employee, individuals must be, or have been, on the regular payroll during the reporting period of either the newspaper or a wholly-owned subsidiary of the newspaper that is actively engaged in the production or distribution of the newspaper. Employees of subsidiary organizations, such as radio and television stations, job printing plants and so forth, that are not actively engaged in the production or distribution of the newspaper, are not eligible.

(b) To be classified as a correspondent, individuals must contribute at least one article per month that is printed in the newspaper.

(c) To be classified as an agent, individuals must be currently involved in delivering the newspaper to subscribers.

An individual classified as an employee, correspondent or agent for more than one newspaper may be included in the average qualified circulation of only one newspaper.

(d) Print and/or digital copies served to schools in conjunction with structured classroom settings may be reported as Other Qualified circulation. Only those copies that have supporting documentation confirming usage (i.e., affidavits from schools, verification of delivery and receipt, etc.) available for auditor review may be reported as qualified distribution.

(e) Distribution of print and/or digital copies outside of structured classroom settings may also qualify as qualified circulation provided the following conditions are met:

- (1) The copies are served in conjunction with a formal program designed to encourage literacy and continuing education of the participating student by assisting the student family to improve their life and job skills.
- (2) The program in question establishes minimum participation standards for the student family, and the student family achieves those minimum standards.
- (3) Auditable records demonstrating the student's enrollment in school, the program in question, and completion of minimum participation standards are maintained.
- (4) Only one copy per participating student family household may be claimed.
- (5) Schools and classrooms offering home-delivered copies must also participate in NIE programs requiring usage of the newspaper.

(f) Copies provided to registered college student in a campus setting in lieu of a classroom setting may be classified as Other Qualified circulation under the following conditions:

- (1) Only copies provided to registered students will be eligible under this policy.
- (2) All copies made available to registered college students must be placed in limited access areas only registered student are permitted, such as dormitories or residence halls, cafeterias restricted for use by registered students, etc. or by 'smart vending machines' operated by student identification. Copies are to be available for individual pickup and should not be delivered to individual rooms/mailboxes.
- (3) Only copies picked up by registered students may be claimed as qualified circulation.
- (4) The publisher must maintain daily records to show the number of copies placed at each individual pickup location, the copies picked up, and the number of copies remaining at the end of the day. Such records are subject to field auditor verification.

C 103.3 Business/Traveler Copies

(a) Business Copies

All copies or subscriptions purchased in quantities of two or more by corporations, institutions or individuals for employees, subsidiary companies or branches may be included in paid circulation as an element of Paid Business/Traveler Circulation, Group Subscriptions provided either:

2025 Bylaws & Rules Book – Canada

- (1) The newspaper has records indicating names or titles of the employees, or
- (2) Subscriber records are available for AAM verification indicating the names or titles of those receiving the newspaper.

(b) Traveler (Hotel) Copies

All copies purchased by hotel guests as described in this rule and/or purchased by hotels for distribution to guest rooms may be included in paid circulation as an element of Paid Business/Traveler Circulation, Hotel Distribution. Copies allocated to this category shall be further classified as follows:

“Guest refund” – copies distributed to guest rooms wherein the guest is notified upon check-in that a specified amount is included in the price of the room for the newspaper and that amount will be refunded should the guest elect not to receive the newspaper.

“Room/lobby copies” – copies intended for distribution to guests.

Article 104 - Time of Making Audits

C 104.1 Timing of Audit

(a) All audits for newspapers in the same city shall be for periods ending at the same date.

The regular audit of a newspaper with average circulation less than 75,000 copies per issue utilizing the 24-month period ending with a calendar quarter may continue to do so. All other audits will be on a continuous audit program wherein annual audit statements will be issued.

C 104.2 Initial Audit

See also B 102.6.

(a) The initial audit of a newspaper applicant for membership in a city where there is already a newspaper member or members shall cover a period of at least six months ending with the same date as the audit of the present member or members, except as provided in paragraph (c) of this section.

(b) The initial audit of a weekly, semiweekly or triweekly county newspaper applying for membership on the plan of being audited every other year shall cover a period of at least three months ending with any calendar quarter, except, in a city where there is already a newspaper member on the plan of being audited every other year, the initial audit period of three months shall end with the same date as the audit of the member.

(c) In the case of a newly established newspaper the initial audit may be made of all issues distributed within a regular period ending any calendar quarter provided there has been regular issuance for not less than three months and provided further said newspaper is not published in a city in which there already is a member or members. If there is a newspaper member in the city, the initial audit may be made for all issues distributed within the audit period already established provided there has been regular issuance for not less than three months. If there has not been regular issuance for at least three months, the initial audit of the applicant shall be deferred until the following regular audit period.

C 104.3 Reinstatement Audit

Reinstatement audits of newspapers under suspension of service shall coincide with the audit period of the other newspapers in the same city.

2025 Bylaws & Rules Book – Canada

Article 105 - Other Qualification Standards

C 105.1 Subscriptions Involving Digital Editions

The following rule language represents additional qualification standards unique to the utilization of digital editions (platforms). Unless otherwise indicated, these rules are intended to augment, not replace, other core qualification rules governing paid and qualified circulation for newspapers.

(a) Paid Circulation:

(1) Print Plus Digital Publishing Plan – This rule is intended to govern situations where a subscriber receives delivery of a print edition and has the ability to access a digital edition for the same publishing day. In all such cases, provided all other qualification rules and policies are followed, one digital circulation unit may be claimed as paid each day the consumer accesses the digital edition platform.

(2) Print and Digital Publishing Plan – This rule is intended to govern situations where individual subscriptions of a print edition are not available every publishing day and where a digital edition is included as part of the subscription package for those days where printed editions are not available. In all such cases, one print or digital circulation unit may be claimed as paid for the specified frequency of delivery as defined in the subscription offer provided all other qualification rules and policies are followed. Similar to the preceding section, on days the print edition is published and made available via a subscription model, one digital circulation unit may be claimed as paid each day the consumer accesses the digital edition platform.

- The subscriber must demonstrate ability to access digital platform (i.e., provide email address during subscription ordering process, etc.)

(b) Qualified Circulation

(1) Subscriptions – Digital subscriptions served to individuals qualify if the recipient registers and activates or downloads the edition. One circulation unit may be claimed as qualified each day the consumer accesses the edition.

C 105.2 Vacation Paks

Copies held by the publisher or independent carrier for distribution to a subscriber during the period the subscriber is on vacation may be included in paid circulation subject to the following provisions:

(a) The subscriber specifically orders in advance the copies.

(b) The term of the vacation pak plan is limited to four calendar weeks.

(c) Digital editions are not eligible to be used in vacation pak programs.

C 105.3 Single-Issue Sales of Back Copies

A newspaper of any frequency is considered a back copy once the subsequent corresponding day's newspaper is made available for sale. Single-issue sales of back copies of daily newspapers shall not be recognized as paid circulation in AAM reports and should therefore be included in unpaid distribution.

C 105.4 Subscription Offer Based on Acceptance Unless Declined

2025 Bylaws & Rules Book – Canada

Publishers may modify existing subscriber contracts to add additional days of service without an incremental charge under one of the following circumstances:

(a) Frequency Conversion (“forced”) – Publishers may eliminate an existing frequency and convert all of these subscribers to a new delivery schedule that is universally available to the public. The additional service in such a forced conversion can qualify as paid circulation provided the discontinued frequency is not reinstated with six months and no inference is made that the change is temporary.

Examples of forced frequency conversions include the addition of Saturday delivery to Sunday-only customers; weekend subscribers to receive Monday copies during football season; Monday through Friday subscribers to receive Saturday and Sunday copies; the addition of Thanksgiving Day copies to Sunday-only subscribers; etc.

Digital editions may be included as part of frequency conversions provided registration and activation has been made.

(b) Frequency Upgrades (“opt-out”) – Publishers may upgrade an existing subscriber to a greater frequency, with the option to opt-out, even while the original frequency remains available in the marketplace. For example, publishers may add Saturday delivery to some current Sunday-only subscribers while continuing to sell Sunday-only subscriptions.

To qualify for inclusion in paid circulation, copies served under this provision of the rule must adhere to the following criteria:

(1) The initial notification must advise of the specific delivery change that is to occur; the term of added delivery (12 week minimum); instructions on how to decline the incremental delivery. This notification must be presented in a clear and conspicuous manner.

(2) The addition of a single day or other irregular (nonrecurring) delivery day (such as the addition of Thanksgiving to Sunday-only subscribers) is not permitted within this provision of the rule. Should a subscribing household opt-out of the incremental service, all added copies served that were incremental to the original subscription frequency are to be excluded from paid circulation claims.

Digital editions may not be included as part of a frequency conversion unless the offer is an opt-in upgrade. In this instance, the converted subscriber must register and activate the digital subscription.

C 105.5 Transfers and/or Purchase of Subscription Lists

When two or more newspapers consolidate subscriber files, copies of the surviving newspaper may be included in AAM reports as paid circulation under the following conditions and with the following qualifications:

(a) The newspapers involved in the transaction must be homogenous.

(b) A consolidation of subscriber files of daily newspapers or other publications with a predominantly local appeal will be recognized under this rule only when the merged publications have been published in the same general area (100-mile radius).

(c) The number of issues to be credited as paid circulation on an unexpired subscription shall, at the option of the publisher, be ascertained by one of the following methods. The decision shall be subject to approval by the managing director.

(1) By dividing the sum of money still due the subscriber at the basic annual subscription price of the discontinued newspaper by the price per copy of the surviving newspaper, said per-copy price to be a pro rata of the basic annual subscription price of the surviving publication.

(2) By counting the number of copies of the discontinued newspaper still due the subscriber and crediting the same number of copies of the substituted newspaper as paid, providing the basic annual subscription price of the discontinued newspaper is at least 50 percent of the basic annual subscription price of the substituted publication or provided that the pro rate single-copy price (basic

2025 Bylaws & Rules Book – Canada

annual subscription price divided by number of copies published annually) of the discontinued newspaper is at least 50 percent of the pro rata single-copy price of the continued publication.

(d) Not more than six months may elapse between the cessation of service to the subscriber of the newspaper subscribed for and the beginning of service by the newspaper substituted therefore.

(e) When a merger of newspapers is affected, the first semi-annual data reports thereafter shall contain an explanation of the activity.

(f) If the transfer of the subscriber file is due to the suspension or cessation of a newspaper and if the option is given to the subscriber of receiving in cash what is due on the old subscription, but the subscriber chooses to be served instead with copies of the surviving newspaper, the subscription shall be counted the same as if the subscriber had subscribed for the purchasing newspaper in the first place, subject to provisions of paragraph (c) of this rule.

(g) If the transfer of the subscriber file is due from one ongoing newspaper to another, the subscriber must be given the opportunity to remain with the newspaper subscribed to, or a cash refund of what is due on the old subscription. Subscribers choosing to be served with copies of the surviving newspaper shall be counted the same as if the subscriber had subscribed to the purchasing newspaper in the first place, subject to provisions of paragraph (c) of this rule.

(h) In all cases where reported circulation for the merged newspapers includes digital editions served to subscribers, the subscribing household must reaffirm by executing a new registration and activation.

Article 106 - Other Reports

C 106.1 Brand View and Data Filing

(a) All newspapers may post editorial and/or audience overviews, audience and circulation statistics to the newspaper's designated Brand View page and are required to submit circulation data for the member newspaper and all affiliated publications, if applicable, on a semiannual basis for the 6-month periods ended March and September. Newspapers are also required to submit an analysis of the newspaper's total circulation, inclusive of affiliated publications, if applicable.

(b) Data must be submitted via AAM's online filing application by the 15th of the month subsequent to the end of the reporting period for all daily newspapers and the 20th of the month for all weekly and community newspapers (i.e., data for the six months ended December 31, 2019, must be submitted no later than January 15, 2020)

Newspapers granted exceptions to submitting semiannual data in accord with Bylaw 2.11 Member Data Submission and Certification are not required to submit data.

Failure to comply with the data submission requirements may result in a disclosure on the primary filter page of the Media Intelligence Center that identifies the publication as not being current.

(c) Semiannual circulation data may be updated through the filing deadline for the subsequent reporting period. When data is updated, the data report will be annotated as "revised." In addition, when the revised figures show a material difference when compared to the original data submission a bulletin communicating the variance may be posted to the publication's reports library. Filing data revisions of magnitude may need to be verified by AAM auditors at the member's expense.

(d) The applicable audit statement shall contain a reconciliation of all data, including digital metrics and other publications, etc. claimed.

2025 Bylaws & Rules Book – Canada

Article 107 - Analysis by Reporting Areas and Delivery Methods

C 107.1 List of Towns Receiving 100 or More Copies

(a) All publishers of newspapers shall furnish a complete analysis of distribution either by towns receiving 100 or more copies per day, arranged alphabetically by town or an analysis of circulation by Canadian postal codes receiving 100 or more copies in alphanumeric order, to be included in audit reports.

Those newspapers opting to report by towns may also include an analysis by postal code. Those newspapers electing to report by postal code only shall also include total distribution statistics by counties. Newspapers electing to report by postal code only must do so by providing an analysis by three-digit postal codes.

(1) The list shall include a breakdown of the total distribution for one Monday to Friday day and Saturday and/or Sunday issue published. The date or dates selected for the listing in the audit reports shall show circulation that is representative, subject to approval of AAM.

(2) The audit reports of newspapers published in the same city shall use the same date or dates for the listing. If the newspapers cannot agree on the date(s) to be used, AAM shall select the date(s).

In order for any newspaper to report by postal code only, all newspapers in the same city must agree to report likewise. If agreement cannot be reached, the default reporting format shall be by towns, with the option of including the postal code analysis.

(3) All newspapers shall report the distribution for each town in one of the following formats: Total; Total Paid, Total Qualified, Total.

(b) Circulation totals for each county shall be shown and counties shall be listed in alphabetical order by province.

(c) The list by town shall include the following:

(1) Circulation shall be shown for each town, city or recognized community receiving 100 or more copies.

(2) AAM will add occupied household figures based on data established by Statistics Canada for all counties, established city zones and for all towns, cities or communities with 2,500 or more occupied households.

- On an optional basis, newspapers may report their digital copies by town/county based on home or billing address, if known.
 - Digital replica and digital non replica editions shall be reported separately.
- If home or billing addresses are not known, digital copies shall be reported in the aggregate at the end of the analysis.

(3) A total of the distribution in each province shall be included in the list showing distribution in towns receiving 100 copies or more. If any province does not have distribution in cities of 100 or more copies, there shall be two options:

(a) Show the total distribution in each such province.

(b) Show the distribution in all such provinces in one total, using the words "Total all other provinces."

(d) The list by postal code shall include the following:

(1) Circulation shall be shown for each postal code receiving 100 or more copies. Towns included in each postal code will be identified.

(2) AAM will add occupied household figures based on data established by Statistics Canada for all counties, established city zones and for all postal codes with 2,500 or more occupied households within the city zone, retail trading zone and/or newspaper designated market.

2025 Bylaws & Rules Book – Canada

(3) Where by-town analysis is included, distribution of the audited postal code analysis will be made by AAM with the audit report or by the publisher at the publisher's option. If the publisher exercises the latter option of distribution, the audit report will contain a statement that the separate audited analysis is available from the publisher.

2025 Bylaws & Rules Book – Canada

CHAPTER D: BUSINESS PUBLICATIONS

Article 101

D 101.1 Paid Circulation Defined

Paid circulation is hereby defined to be copies of publications, whether single copy or subscription sales, that have been paid for by the purchasers, not for resale, at a price of not less than one cent, net of all other considerations.

(a) Subscriptions may be served for no longer than three consecutive months immediately following the expiration date and such post-expiration copies ("post-expires") may be included in paid circulation. For publications that have a break in service, e.g., published only during the winter months or all months except the three-month period during the summer, the subscriber may receive post-expiration ("post-expires") service of up to three consecutive months immediately following the expiration date, not including the period when not published, and said service can be included in paid circulation.

Post-expiration copies, if served, must be distributed prior to the distribution of the next regularly scheduled issue.

(1) For publications that are published on a weekly or bi-weekly frequency, the publisher may opt to use a month end common expire date. For publications using the common expire date, incremental copies served during the month of expire (one to four copies per subscription) shall be considered paid circulation not post-expire copies. If used, the practice shall be disclosed in the explanatory paragraph of AAM reports.

(b) Subscriptions to any publication received as a result of an offer by a publisher that stipulates that part of the subscription term is free will qualify for inclusion in paid circulation only when a contractual agreement exists for the full term of the subscription.

(c) Subscription resulting from offers based upon the assumption that the offer has been accepted unless specifically declined shall qualify as paid only upon satisfactory evidence that money has been collected to qualify the subscription.

D 101.2 Prices

(a) Basic prices (subscriptions and/or single copy) are the prices at which the publication may be purchased by anyone, at any time, for a definite duration. No special, reduced, or higher price shall be considered a bona fide basic price.

(b) Basic prices must be reported in the semi-annual publisher's statements.

(c) When any change in basic prices occurs, a period of six months following the date of the price increase is allowed to process subscriptions sold before the date of the price increase at previous basic and lower than basic prices.

(d) Business publications may opt to report average per-copy prices and average annualized prices in publisher's statements and audit reports.

The calculation of average annualized subscription price will be as follows: Total gross production revenue divided by gross production copies sold in the 6-month publisher's statement period.

The yield of an average copy price shall also be extended by the one-year frequency to yield an average annualized subscription price.

2025 Bylaws & Rules Book – Canada

Article 102

D 102.1 Multicopy Sales

(a) All copies or subscriptions purchased in quantities of two or more, which promote the professional or business interests of the purchaser, shall be designated as multicopy sales, except as otherwise permitted or prohibited by paragraphs (b) through (e). Multicopy sales, either term subscription or single issue, wherein the copies are shipped in bulk to the purchaser who controls the final distribution shall be reported as "Multicopy - Same Addressee" in AAM reports.

Multicopy sales, either term subscription or single issue, wherein the copies are individually addressed by name and/or title and mailed, shall be reported as "Sponsored Individually Addressed" in AAM reports.

(b) A description of the type and character of the multicopy sales should be made in the notes section of reports including the price and quantity ranges.

(c) Post-expire to multicopy term subscription copies shall be included in nonpaid distribution.

(d) The subscriptions involved in a quantity sale made to an individual or other entity that has a financial interest in the publication shall not be included in multicopy sales unless it can be proved that the sale was made for the benefit of the purchaser and not for the benefit of the publication.

(e) Subscriptions purchased for their own employees that may be mailed in bulk or individually addressed are not subject to paragraph (a) of this rule but may be reported as "individual" on reports provided the publisher maintains records identifying the intended recipient by name and or title.

D 102.2 Membership Benefit

(a) A member of an association, organization, society or club who receives a publication because of membership shall be designated as membership benefit, provided that their records are made available to AAM for audit.

Subscriptions to a privately-owned publication purchased by an association, organization, society, or club, which does not submit its records to audit by AAM, shall be included in multicopy, provided such subscriptions meet the general qualifications of multicopy subscriptions.

(b) There are two types of membership benefit programs: deductible and nondeductible from dues.

The association, organization, society or club must position the cost of the publication as being deductible from dues in a clear manner on dues or invoice notices. The amount allocated for the subscription must be at least one cent.

The second type are those publications wherein the value assigned to the publication is not deductible from dues on dues or invoice notices. In this situation, the association is not required to reduce the amount of dues for the value assigned to the publication. The disclosed value must be at least one cent.

Full explanation as to whether the publication is deductible or nondeductible from dues will be made in the notes section on reports.

(c) The foregoing provisions of the above paragraph (b) shall not apply to an applicant provided that the bylaws of the association, organization, society or club provide that a subscription is part of the association, organization or society dues of each member and the publisher agrees at the time of making application that the stipulations as set forth will be complied with not later than the beginning of the second membership year following the period covered by the initial audit. If compliance is not accomplished within the established time limit, the publication may be advised that a reclassification of the subscriptions is required.

2025 Bylaws & Rules Book – Canada

D 102.3 Gift Subscriptions

(a) A gift subscription shall be considered one which is given as a normal expression of friendship, and which does not promote the business or professional interests of the donor. In no case where an order (or orders) from a single donor covers more than 50 subscriptions shall the subscriptions be regarded as gift subscriptions.

D 102.4 Nondeductible Trade Show Subscriptions

(a) Individual subscriptions received as a result of paying a registration fee at a trade show, business seminar, or similar type of business meeting, where the recipient does not have the option of deducting the subscription price from the registration fee, shall qualify as paid circulation, and be reported as "Subscriptions - Individual" provided the amount of the registration fee allocated for the subscription must be clearly stated on the registration form, the amount allocated for the subscription must not be less than one cent and such subscriptions are explained in the Notes section of reports.

D 102.5 Partnership Sales

All copies purchased by individuals and tied to a partnership agreement (e.g., subscription/single copy of a business publication partnered with a purchase, a product or other service) shall be classified as partnership subscriptions or single copy per the provision of paragraph (e) below, except as otherwise permitted or prohibited by the following provisions:

- (a) The purchaser is notified of the inclusion of the subscription at the point of purchase.
- (b) The amount allocated to the subscription is deductible from the purchase price and is presented in a clear and reasonable manner in all written information.
- (c) The value of other benefits may be calculated as the total cost of purchasing the partnership element without the subscription, provided these benefits are identical to the benefits offered for the purchase which includes a subscription.
- (d) The total price paid must be at least one cent plus the cost of the purchase without the subscription and shall be the same as the amount identified as deductible for the subscription value.
- (e) In the case of single-copy sales, the purchase price of the business publication (single-copy price) must be deductible at the point of purchase.
- (f) Publications that sell partnership subscriptions and single copies, shall list the average number of copies served as "Partnership Subscriptions" and/or "Partnership Single Copy" and a full description of the sale in the notes paragraph.

Article 103

D 103.1 Initial Audit

- (a) The initial audit of a business publication may be made for any period covering at least one issue.
- (b) Publications shall have the option to analyze any issue within the initial audit period.
- (c) Any publication having its initial audit for a period ended other than the standard cycles shall have its next audit conducted for a period ended June 30 or December 31, or July 31 and January 31 for publications serving the medical field.

2025 Bylaws & Rules Book – Canada

Article 104

D 104.1 Publisher's Statements

(a) Except for publications serving the medical field, the semi-annual statements shall cover the period from January 1 to June 30 and July 1 to December 31. Publications serving the medical field shall have semi-annual statements covering from February 1 to July 31 and August 1 to January 31.

(b) On an optional basis, statements may also be filed for any calendar quarter.

(c) When two or more publications offer to sell advertising in combination, the publications may elect to publish a group/network publisher's statement which shall combine circulation statistics. In such cases, the group/network publisher's statement may include a calculation of unduplicated circulation on an optional basis.

If a business publication makes a public statement of an unduplicated circulation figure, such claim is subject to AAM verification and is required to be noted on the publisher's statement.

A publisher may request a report consolidating AAM audited data elements (i.e., circulation, e-newsletters, website activity, etc.) under the following conditions. This report will substitute for the publisher's statement and be subject to all rules as applicable to business publication reporting and qualification.

(a) The various forms of media are homogeneous in terms of editorial content when compared to the host AAM member publications.

(b) The report shall clearly identify that the figures are gross, and that no effort has been made to eliminate any duplication circulation/distribution/exposure.

(c) All claims made in the consolidated media report must be supported by available documentation to be provided to the auditor upon request.

D 104.2 Timing of Audit

(a) Except for publications serving the medical field, all business publication members of AAM shall undergo an audit on a continuous basis, with the release of an Audit Report every 12 months, ended June 30 or December 31. Publications serving the medical field shall have audit periods ended July 31 or January 31.

Article 105

D 105.1 Geographic Analysis

(a) Circulation (except that distributed through newsdealers) shall be analyzed by states/provinces for any issue in the statement period except as provided in D 3.1(b). Paid and nonpaid circulation shall be reported in separate columns.

(b) A count and analysis shall be made in connection with an issue in each audit period. The figures to be used in connection with the following publisher's statement shall be based on the percentages for each state as determined from the issue analyzed, and these percentages shall be projected against the total of the issue to be reported in the geographic analysis.

2025 Bylaws & Rules Book – Canada

Any publisher has the option to make a count and analysis of an issue for each publisher's statement if so desired.

(c) Every Canadian publication with paid circulation of 35,000 or more in the United States shall be required to analyze its U.S. circulation by state.

(d) Subscription circulation may be analyzed by state and three-digit ZIP code prefixes, or province/FSA or counties at the publisher's option.

(e) If print and digital editions are reported in the period, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

(f) International circulation in the geographic analysis of audit reports and publisher's statements, may be analyzed by countries in a format to be agreed to with AAM.

(g) Copies directed to members of the armed forces or to affiliated civilian personnel where the ultimate destination is unknown shall be reported in the geographical as "Military or Civilian Personnel Overseas."

D 105.2 Business Analysis

(a) Publisher's statements and audit reports shall contain a business analysis of subscription circulation. This is required for United States and Canadian subscriptions but optional for international subscriptions. In addition, publishers may also opt to analyze and report circulation separately by country. A publisher may provide subtotals by country if desired.

(b) The business analysis shall be a breakdown by business and industry and/or by title, occupation or function. The analysis shall include subtotals for total qualified paid and nonpaid circulation. Paid and nonpaid circulation shall be reported in separate columns when paid circulation equals or exceeds 50 percent of total circulation. All publications serving the same field may employ a mutually agreed-upon schedule of classifications subject to the approval by AAM.

(c) With approval of the board of directors, waiver of reporting a business analysis may be given.

(d) The business analysis shall include subscription circulation only. Publisher may opt to report separately the various types of subscription sources (i.e., membership benefit sponsored individual addressed, etc.)

The issue analyzed must be the same as used in the geographic analysis.

United States and Canadian paid subscriptions for which business/occupational data is not available is to be reported as other paid circulation.

(e) The classifications assigned by the publishers must be based on information obtained from business cards, letterheads, recognized directories, questionnaires, telephone interviews or other acceptable evidence. All documentation used for this classification must be retained and made available to the auditor upon request.

No information may be used for classification purposes that was obtained more than three years prior to the date of the issue analyzed. No information may be used for classification purposes that was obtained after the filing deadline for the publisher's statement.

(f) If print and digital editions are reported in the period, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

(g) When government defined North American Industry Classification System (NAICS) are used for the business and industry portion of the business analysis, publisher members have the option of classifying all subscribers either according to the primary business activity of the subscriber's business establishment or, where distinct and separate activities are performed at a single physical location, according to primary

2025 Bylaws & Rules Book – Canada

business activity of the subscriber. Publishers shall disclose which edition of the NAICS manual was used to collect/report data in the Notes section of AAM reports.

(h) For newly admitted business publication members, there will be a grace period for reporting of the business analysis up to 18 months following the period covered by the initial audit.

D 105.3 Source Analysis

(a) Age of source data may be reported for the publication's circulation qualifying as nonpaid and paid.

(b) The issue analyzed must be the same as used in the business analysis and the geographic analysis. No information may be used for classification purposes that was obtained after the publisher's statement filing deadline.

(c) The analysis may be made in total or by age of the source document (one, two, and three years) for each nonpaid circulation to field served category for which circulation averages are reported.

If paid circulation is analyzed, publishers shall allocate paid circulation to nonpaid source categories according to the following criteria:

Individual subscriptions to direct request.

Membership Benefit subscriptions (if deductible from dues) to direct request.

Membership Benefit subscriptions (if nondeductible from dues) to communication other than request.

Multicopy subscriptions to communication other than request.

(d) A count and analysis shall be made of one issue in each audit period. The figures to be used in connection with the following publisher's statement may be based on the percentages for each category as determined from the analyzed issue, and these percentages shall be projected against the total circulation of the issue reported.

(e) If print and digital editions are reported in the period, Total Print, Total Digital and Unique Total Qualified circulation are reported throughout the table.

D 105.4 Mailing Address Analysis

(a) Publisher's statements and audit reports may contain an analysis by recipient mailing address of qualified paid and nonpaid circulation. If reported, the issue analyzed must be the same as used for the business and the geographic analyses. No information may be used for classification purposes that was obtained after the filing deadline for the publisher's statement.

Paid and nonpaid circulation shall be reported in separate columns.

(b) Subscription circulation shall be analyzed according to the manner in which copies are addressed, using the following categories: individuals by name and title and/or occupation; individuals by name only; titles or occupations only; company names only; and multicopy subscriptions.

Copies addressed to individuals without title may be reported as "Individuals by name and title and/or occupation" if supported by auditable documentation of the individual's title.

(c) If print and digital editions are reported in the period, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

2025 Bylaws & Rules Book – Canada

(d) If reported, a count and analysis shall be made of one issue in each audit period. The figures used in connection with the following publisher's statement may be based on the percentages for each category as determined from the analyzed issue, and the percentages shall be projected against the total circulation of the issue.

(e) "Store names only" may be substituted for "Company names only" whenever necessary or may make other equivalent changes in "Company name only," subject to approval.

D 105.5 Definition of Recipient Qualification

The definition of recipient qualification in AAM reports shall be a statement describing specific businesses, industries, titles, occupations and/or functions, with clearly defined limits, to whom the publication is directed. It shall exclude statements of a promotional nature and be subject to editing by AAM. Publishers shall maintain auditable documentation, not more than three years of age, to substantiate that all nonpaid circulation is to the field served and paid circulation function and or occupation meets the recipient qualification definition. Paid circulation pending qualification to field served and/or recipient qualification may be included in reports.

Article 106

D 106.1 Renewals

A statement of percentage of renewals is optional for business publications reporting paid subscription circulation. The analysis shall be made on paid subscription circulation only. A subscription shall be considered a renewal if received within six months after its expiration and paid for within six months following receipt. Publishers making a claim of any renewal percentage shall be required to submit such claim to AAM for reporting in the notes section of the report with full detail of the methodology of the claim. Documentation supporting the claim must be available for audit.

Article 107

D 107.1 Deferred Subscriptions

Under the deferred subscription plan, individual subscribers receive a publication one month or more after the on-sale date. These issues are served from returns. If subscribers pay a qualifying price, these subscriptions are classified as Individually paid.

D 107.2 Back Copies

(a) An issue of a publication shall be considered a back copy immediately upon the appearance for sale of the next succeeding issue.

(b) Back copies served in connection with a term subscription offer shall be recognized as paid up to three months preceding the date of the order, provided the subscription offer has specifically included the offer of back copies, or the subscriber has requested a back dating of the subscription, and provided consecutive copies are served and are paid for in accordance with rules governing a paid subscriber.

(c) Only copies that have been distributed in connection with orders dated during and 30 days after the regular publisher's statement period may be included in paid.

2025 Bylaws & Rules Book – Canada

(d) In cases where the subscriber has not been specifically notified at or before the date of the order that back copies will be served as part of the subscription, credit shall be allowed only for copies served which do not date back beyond one issue previous to the issue current on the date of the order for publications other than weeklies, or beyond two issues previous to the issue current on the date of the order for weekly publications.

(e) Single-issue sales of back copies shall be recognized as paid provided the purchaser takes affirmative action to make the purchase of a specific issue.

Article 108

D 108.1 Premium Defined

Premiums are anything offered to a subscriber at time of solicitation, in addition to regular issues of the publication itself, and shall be reported in AAM reports as a premium, regardless of whether said extraneous thing be given with or without additional payment above the subscription price and whether or not such extraneous thing is given only to new subscribers or to all subscribers. In addition, any presentation to current subscribers which, in the opinion of the managing director, implies future receipt of such extraneous things in conjunction with continued (or future) subscriptions will cause renewal subscriptions to be judged as premium induced. The number of subscriptions, whether new or renewal, involving such premiums taken during any period for which publisher's statement is filed may be reported in the paragraph designated for that purpose. This reporting is optional for all members.

Premiums are anything except:

- (1) Complete issues of newspapers or periodicals sent to all subscribers for the period included in the offer.
- (2) Merchandise offered to current paid subscribers as an inducement to convert payment methodology on future subscriptions. Such offers are to be made separate from subscription renewal efforts and are limited to inducements to subscribers to agree to ongoing ('til forbid) continuous service which may include automatic billing process and/or debits to authorize credit card accounts.
- (3) Free or discounted access to archive or back, or expanded content of the publication included as part of the subscription to the publication.
- (4) Free or discounted access to the publication's website.

D 108.2 Premiums with Subscriptions/Single-Copy Sales

(a) When a premium is used in connection with a subscription or single-copy sales offer or implied to current subscribers in conjunction with continued or future subscriptions, the full value of the premium, whether stated or not, must be collected. The value of the premium is the actual cost to the publisher, or the recognized retail value, or the represented value, whichever is highest.

In those situations where the cost to the publisher is used to calculate the premium value, set-up costs and shipping and handling fees to the publisher from the manufacturer shall not be considered.

D 108.3 Premiums with Combination Sales

When a premium is used in connection with a combination of business publications or other publications (magazine or newspaper), the amount paid by the subscriber must not be less than the value of the premium plus one cent per publication.

2025 Bylaws & Rules Book – Canada

D 108.4 Subscription/Single-Copy Sales in Combination

- (a) A "forced" combination is defined as two or more publications offered or sold together for an amount less than the total of the basic prices of all the publications (as determined by D 101.1) and wherein all publications intend to qualify the distribution as paid circulation, except when it is clearly made known to the purchaser that each of the publications may be purchased individually at the same price as if purchased as part of the group.
- (b) When subscriptions for two or more publications are ordered or sold in combination the amount paid by the subscriber must not be less than one cent per publication.
- (c) The amount of money to be allocated to each title in the combination sale offer for purposes of classification of the sales compared to basic prices (see D 101.2) shall be based on the offer presentation itself, if it includes references to the value of each subscription in the combination sale (the sum of which must total to the selling price for the combination sale), or the amount to be charged incrementally or reduced from the existing contract or renewal in the add on offer, or, if no such presentation is made, shall be based on the pro rata of each publication's basic price to the sales price.
- (d) Existing and renewing business publication subscribers may qualify as paid provided the offer to add on the combination publication requires an affirmative act on the part of the subscriber and incremental payment beyond the rate of the existing contract, or an option to reduce the rate of the existing contract if the offer is declined. The amount of incremental payment or reduction of rate from the existing contract must be clearly disclosed and must be at least a qualifying amount as defined by the publication paid circulation defined rules. Promotion materials shall not imply nor suggest that the add on business publication is free or at no additional cost.

D 108.5 Subscriptions Purchased with Award Points

Subscriptions acquired through the redemption of accrued award credits or loyalty points (e.g., frequent flyer miles, credit card member points) may qualify as paid circulation if the publisher presents satisfactory evidence that the cash value of the redeemed product or service is equivalent to one cent or more. These loyalty programs require that the participant takes action to enroll in the program and record a specific volume of transactions to earn sufficient award credit for award points.

- (b) Reporting subscriptions obtained through the redemption of award points shall be reported in individual subscriptions with an explanatory providing the average number of copies served in the publisher's statement and audit report period.

Consult AAM's website for specific requirements for program eligibility and requirements for inclusion of a magazine as an item for redemption.

D 108.6 Credit Subscriptions

- (a) A subscription that is sold on a promise-to-pay basis shall be regarded as a credit subscription. These subscriptions will qualify as paid circulation provided:
- (1) The subscriber pays the sum billed at that sum is at least one cent, net of all other considerations.
- (b) If the publisher cancels the subscription because of nonpayment, the number of copies served shall be established and deducted from paid circulation.
- (c) Copies deducted from paid circulation because of non-payment should be report as nonanalyzed nonpaid
- (d) To qualify as paid circulation, payment must be made within six months after start of service.

2025 Bylaws & Rules Book – Canada

Article 109

D 109.1 Extensions Because of Price Reduction

In the event of a reduction in the basic subscription price of a publication the unexpired portion of a subscription which was paid for at the higher price may be extended in the ratio that the value of such unexpired portion at the old price bears to the new subscription price for such unexpired period.

D 109.2 Extensions Because of Reduction in Frequency

If a publication reduces its frequency of issuance the expiration dates of all unexpired subscriptions appearing on the list at the time such change becomes effective may be extended to a date which would enable the delivery of the same number of copies originally ordered and promised.

D 109.3 Transfers

When a publication transfers subscriptions to another publication due to purchase of a subscription list or merger of the publications, the subscribers of the transferring publication served with copies of the going publication may be included in AAM reports in paid circulation under the following conditions:

(a) The publications must be homogeneous.

(b) In the case of publications of predominantly local appeal, both publications must have been published in the same community.

(c) The number of issues to be credited as paid circulation on an unexpired subscription shall, at the option of the publisher, be ascertained by one of the following methods. The decision shall be subject to approval by the managing director.

(1) By dividing the sum of money still due the subscriber at the publisher's suggested subscription price of the discontinued publication by the price per copy of the surviving publication.

(2) By counting the number of copies of the discontinued publication still due the subscriber and crediting the same number of copies of the substituted publication as paid.

(d) Not more than six months may elapse between the cessation of service to the subscriber of the publication subscribed for and the beginning of service by the publication substituted therefor.

(e) If the option is given to the subscriber of receiving in cash what is due on the old subscription but the subscriber chooses to be served instead with copies of the purchasing publication and authorization to serve the publication instead of cash is satisfactorily established in the judgment of the managing director, the subscription shall be counted the same as if the subscriber had subscribed for the purchasing publication in the first place, subject to provisions of paragraph (c) of this rule.

(f) The first publisher's statement following the transfer shall provide an explanatory identifying the publication purchased and the average circulation served during the statement period from the purchased publication.

2025 Bylaws & Rules Book – Canada

Article 110

D 110.1 Optional Subscription Sale Analysis

Subscription sales that occurred in the reporting period may be analyzed in detail by term, channel and premium usage at the option of the publisher in AAM's standard format.

D 110.2 Separate Editions

The circulation of a separate edition of a member business publication may be included in the in AAM reports, either print or digital format provided the edition carries the same publication name, logotype and is editorially homogeneous with the member publication.

In addition to the circulation of the edition being included in the total circulation claim by publisher, separate reporting will be made in the paragraph devoted to Average Circulation of Regional and Demographic Editions.

Also, see Rule D 110.3 Digital Editions

D 110.3 Digital Editions

A digital edition is defined as a product distributed via electronic/digital means that maintains the basic identity of the host publication either by maintaining the same name/logo or by identifying itself as "an edition of _____," but may contain different editorial and/or advertising content.

Digital edition circulation must be reported separately in publisher's statements and audit reports in accord with Rule D 110.2.

(a) Average qualified digital edition circulation shall be reported separately in average circulation by issues, business analysis, age of source, mailing address analysis and geographic analysis paragraphs of AAM reports.

(b) Digital editions may not be comprised of a newsletter/e-newsletter or unrestricted website access.

Email notification must be made to designated recipients for subscriptions purchased in bulk by third parties.

For nonpaid subscriptions, email notification to the subscriber of the product's availability on the restricted access website qualifies as delivery.

(c) Digital edition-only subscribers shall be required to provide a land address for reporting purposes in the geographic analysis. Digital edition-only subscribers who do not provide a usable land address shall be reported as "email address only."

(d) Paid and nonpaid copy delivery resulting in "bounce backs" may be included in qualified circulation for a limited time frame provided the delivery issue associated with the bounce back is rectified, or the subscriber is purged from the subscriber file in accord with the following scale:

Hard Bounces: daily – ten issues; weekly – four issues; biweekly – two issues; and monthly – one issue.

Soft Bounces: daily – sixty issues; weekly – twelve issues; biweekly – six issues; and monthly – three issues.

A soft bounce occurs when the individual's email address or online library is valid. However, there is an issue preventing the digital issue from being delivered (i.e., the mailbox or library is full and cannot accept delivery until space is available).

A hard bounce occurs when the individual's email address or library is no longer valid at all (i.e., closed or deleted).

2025 Bylaws & Rules Book – Canada

(e) Midterm conversions from print only to digital edition only may be completed at the publisher's discretion provided the subscriber has the opportunity to opt-out of the conversion and retain the print subscription or terminate the subscription altogether.

(f) Paid multicopy sales and license agreements may be reported as qualified circulation in AAM reports provided the purchaser pays a qualifying price for each subscription.

Also, see Rules D 101.2 Prices, D 105.3 Source Analysis, and D 110.2 Separate Editions.

D 110.4 Multi-Title Digital Programs

Sales generated from programs wherein the consumer makes purchase of a subscription to receive multiple-title access to digital issues being offered shall be reported on AAM reports as multi-title digital.

(a) Copies generated as a result of this program shall be classified as paid circulation provided the consumer has made payment for participation.

(b) Proof of access shall be required for the issue to be claimed as circulation.

(c) Standard reporting of analytics shall be made: average quantity of unique opens, average number of times opened and average total copies per board requirements.

Article 111

D 111.1 Additions and Removals

Publishers reporting qualified nonpaid circulation may include in the circulation by issue a count of the additions and removals of recipients by issue.

Article 112

D 112.1 Nonpaid Direct Request Circulation

Nonpaid direct request circulation may be reported in circulation claims provided the following requirements are met:

(a) Nonpaid direct request order documentation must be retained for audit.

(b) Orders placed directly by the recipient must provide evidence of the origin of the order. This is typically made through a signature on request or answering a question of Yes/No I wish to receive the publication. For paperless request sufficient evidence must be retained to support transaction.

(c) Orders requested by corporations for their employees must include individual names to whom the request is being made for on their behalf.

(d) All nonpaid direct request order documentation must have a date assigned by either the requestor or electronic means.

Consult AAM's website for specific detailed requirements and samples of eligible requests.

2025 Bylaws & Rules Book – Canada

(e) Direct request circulation is reported in the source analysis paragraph of publisher's statements and audit reports as either direct request from recipient or direct request from recipient's company.

(1) To be classified as direct request from recipient the request must come from either the recipient, recipient's supervisor, assistant or coworker.

Requests originating from a coworker will qualify a maximum of 2 subscriptions as direct request (respondent plus one coworker, or two qualified coworkers).

If the request is not from the recipient, the request documentation must identify the relationship to the recipient and the respondent's full name and job title.

(2) A request that is not eligible to be included in direct request from recipient and meets all other aspects of this rule may be classified as direct request from recipient's company.

(f) Nonpaid subscription requests must be renewed at least once each 36 months.

(1) For renewals only, the following subscriber-initiated forms of engagement would also qualify as requests for the publication:

(a) Change of address and/or company affiliation.

(b) Accessing the publication's digital edition on the following scale:

(i) For business publications that publish 13 to 52 or more issues per year – nine times per publisher's statement period.

(ii) For business publications that publish five to 12 issues per year – two times per publisher's statement period.

(iii) For business publications that publish three to four issues per year – one time per publisher's statement period.

(iv) For business publications that publish one or two issues per year – one time per audit period.

Publications must maintain proof of initial request and subsequent engagement activity for auditor review.

D 112.2 Nonpaid Circulation Other Than Direct Request

(a) Nonpaid circulation other than direct request may be reported in reports provided the recipient is in the field served by the publication and the age of the source documentation does not exceed 36 months.

(b) Communications from recipient and recipient's company which do not meet the direct request criteria in D 12.1 may be reported as communication other than request. Reader service reply cards, surveys, questionnaires, other written documents, digital or telecommunications which do not satisfy direct request specifications may be included.

(c) Recognized business directories may be used as a source of nonpaid circulation to the field served. Directories must be adequately identified and dated and be made available for auditor's examination.

(d) Lists of qualified recipients may be reported as nonpaid to field served. Such lists must be dated and identified and are subject to auditor's examination.

D 112.3 Nonpaid Multicopy Same Addressee Circulation

(a) Nonpaid multicopy same addressee circulation is circulation delivered to designated addressees for redistribution to recipients unknown to the publisher. Sufficient records to support distribution must be retained and made available for auditor review.

2025 Bylaws & Rules Book – Canada

(b) Reports will make no inference as to their final disposition.

(c) Nonpaid multicopy same addressee circulation may be reported in reports provided primary recipient (addressee) is in the field served by the publication and the age of source documentation does not exceed 36 months.

(d) Circulation may be classified by business and industry based upon the primary recipient's (addressee's) demographic data. In these situations, the primary recipient (addressee) must provide satisfactory evidence to support the classification. Classification by title and occupation shall be "other."

(e) Nonpaid multicopy same addressee circulation initiated by a request from the primary recipient (addressee) shall be reported as "Direct request from recipient's company" in the source analysis. Other acceptable sources are business directories, lists and other sources.

(f) Nonpaid subscriptions delivered in bulk to corporations for their employees, are not subject to the provisions of this rule provided the records show that copies are addressed and mailed to individuals. If the copies are mailed in bulk, satisfactory documentary evidence must be maintained showing that such copies are for distribution to employees.

(g) Nonpaid multicopy same addressee circulation shall be fully explained in the body of the reports, giving details of their character and nature, showing how the copies are distributed and any other amplification necessary to make possible a clear analysis of their value including the range of distribution as follows: "distributed in quantities of _____ to _____."

(h) Nonpaid multicopy same addressee subscriptions may not be fulfilled with digital editions.

D 112.4 General Explanation for Nonqualified Circulation

(a) All data pertaining to noncontinuous market coverage copies must be made available for auditor upon request.

(b) Publishers may report copies sent to shows and conventions in reports provided documentation of delivery is retained and made available to auditor upon request. In addition, publications may provide additional detail in the notes section of reports regarding specific shows where delivery occurred.

No inference shall be made as to the final disposition of copies allocated for shows and conventions. The term "nonqualified circulation" shall be noted in the explanatory paragraph when copies allocated for shows and conventions are reported.

D 112.5 Regularly Scheduled Special Edition Circulation

Copies served to qualified recipients who receive featured edition circulation on a frequency different from regular frequency of the publication (such as once a month for a weekly publication, or once a quarter for a monthly publication) shall be identified as "regularly scheduled special edition circulation" and be reported separately in all reports.

(a) Nonpaid circulation must be served as follows to be included in the average:

(1) Publications with a regular frequency of monthly or less often must serve recipient every issue carrying the feature editorial for at least six months; or

(2) Publications with a regular frequency of more than monthly must serve recipient every issue carrying the feature editorial for at least three months.

(b) Disclosure of the frequency in which the feature editorial is published shall be noted in paragraphs 1(a) and 1(b) of the publisher's statement and the average copies served for that frequency shall be shown.

2025 Bylaws & Rules Book – Canada

Article 113

D 113.1 Unit Analyses

(a) Reports may, at the option of the publisher, include a unit count analysis of circulation to the field served and/or an analysis of subscribers according to secondary or multiple job functions.

(b) The analyses shall contain a breakdown for as many categories of the business analysis breakdown as desired by the publication requesting the unit count and/or multiple job function audit but must include categories in the order in which they appear in the breakdown. Those categories for which analyses are not made shall be clearly identified in the business analysis breakdown.

(c) All data and records pertaining to these analyses must be preserved for auditor's examination.

No information may be used for classification purposes which was obtained more than 36 months prior to the date of the issue analyzed.

(d) For unit count analyses, standard definition of a unit determined by the publisher and approved by AAM must be detailed in the report.

A geographic analysis by state, province and country, in accord with AAM's standard format, may be made a part of the unit analysis, at the publisher's option. The breakdown shall include separate totals for those copies analyzed by units and those not analyzed.

Article 114

D 114.1 Special Issues

Special issues are those issues published in addition to the regular frequency in which editorial content differs from the subject material of issues regularly published.

Special issues shall be reported in the issue by issue paragraph only with a footnote that the circulation is not included in the average circulation claims for the period. A nonpromotional explanation of special issues may be shown in the notes section of the report, subject to the provisions of Rule B 3.4.

Special issues shall not be considered in the determination of consecutive issuance for nonpaid circulation.

2025 Bylaws & Rules Book – Canada

CHAPTER E: FARM PUBLICATIONS

Article 101

E 101.1 Paid Circulation Defined

Paid circulation is hereby defined as copies of publications, whether single copy or subscription sales, that have been paid for by the purchasers, not for resale, not less than one cent, net of all considerations.

(a) Subscriptions may be served for no longer than three consecutive months immediately following the expiration date and these post-expiration copies may be included in paid circulation. For publications that have a break in service, e.g., published only during the winter months or all months except the three-month period during the summer, the subscriber may receive post expires service of up to 3 months immediately following the expiration date, not including the period when not published and said service can be included in paid circulation.

Post-expiration copies, if served, must be distributed prior to the distribution of the next regularly scheduled issue.

- (1) For publications that are published on a weekly or bi-weekly frequency, the publisher may opt to use a month end common expire date. For publications using the common expire date, incremental copies served during the month of expire (one to four copies per subscription) shall be considered paid circulation, not post-expire copies. If used, the practice shall be disclosed in the explanatory paragraph of AAM reports.

(b) Subscriptions to any publication received as a result of an offer by a publisher that stipulates that part of the subscription term is free will qualify for inclusion in paid circulation only when a contractual agreement exists for the full term of the subscription.

(c) Subscriptions resulting from offers based upon the assumption that the offer has been accepted unless specifically declined shall quality as paid only upon satisfactory evidence that money has been collected to qualify the subscription.

E 101.2 Prices

(a) Basic prices (subscriptions and/or single copy) are the prices at which the publication may be purchased by anyone, at any time, for a definite duration. No special, reduced or higher price, shall be considered a bona fide basic price.

(b) Basic prices must be reported in the semi-annual publisher's statements.

(c) When any change in basic prices occurs, a period of six months following the date of the price increase is allowed to process subscriptions sold before the date of the price increase at previous basic and lower than basic prices.

(d) Farm publications may opt to report average per-copy prices and average annualized prices in publisher's statements and audit reports. The calculation of average annualized subscription price will be as follows: Total gross production revenue divided by gross production copies sold in the 6-month publisher's statement period.

The yield of an average copy price shall also be extended by the one-year frequency to yield an average annualized subscription price.

2025 Bylaws & Rules Book – Canada

Article 102

E 102.1 Multicopy Sales

(a) All copies or subscriptions purchased in quantities of 11 or more shall be designated in AAM reports as multicopy sales except as otherwise permitted or prohibited by the following provisions.

Multicopy sales, either term subscription or single issue, wherein the copies are shipped in bulk to the purchaser who controls the final distribution shall be reported as "Multicopy - Same Addressee" in AAM reports.

Multicopy sales, either term subscription or single issue, wherein the copies are individually addressed by name and/or title and mailed, shall be reported as "Multicopy Individually Addressed" in AAM reports.

(b) Post-expire to multicopy term subscription copies shall be included in nonpaid distribution.

E 102.2 Paid Multicopy Sales Defined

(a) Quantity sales shall be set up as multicopy sales only when the price paid is in accordance with E 101.1.

(b) Multicopy subscriptions carried beyond expiration of time originally paid for shall be excluded from multicopy sales and included in nonanalyzed nonpaid circulation.

(c) The subscriptions involved in a quantity sale made to an individual, group of individuals or corporation, which have a financial interest in the publication, shall not be included in multicopy sales but shall be included in nonqualified circulation, unless it can be proved to the satisfaction of the managing director that the sale was made for the benefit of the purchaser and not for the benefit of the publication.

E 102.3 Gift Subscriptions

(a) A gift subscription shall be considered one which is given as a normal expression of friendship and which does not promote the business or professional interests of the donor. In no case where an order (or orders) from a single donor covers more than 50 subscriptions shall the subscriptions be regarded as gift subscriptions but shall instead be classified as term subscriptions in multicopy, provided they conform to the rules governing multicopy sales.

E 102.4 Membership Benefit

(a) A member of an association, organization, society or club who receives a publication because of membership shall be designated as membership benefit, provided that their records are made available to AAM for audit.

Subscriptions to a privately-owned publication purchased by an association, organization, society or club which does not submit its records to audit by AAM shall be included in multicopy, provided such subscriptions meet the general qualifications of multicopy subscriptions.

(b) There are two classifications of membership benefit programs: deductible and nondeductible.

The association, organization, society or club must position the cost of the publication as being deductible from dues in a clear manner on dues or invoice notices. The amount allocated for the subscription must be at least one cent.

The second type are those publications wherein the value assigned to the publication is not deductible from dues on dues or invoice notices. In this situation, the association is not required to reduce the amount of dues for the value assigned to the publication. The disclosed value must be at least one cent.

2025 Bylaws & Rules Book – Canada

Full explanation as to whether the publication is deductible or nondeductible from dues will be made in the notes section on reports.

(c) The foregoing provisions of the above paragraph (b) shall not apply to an applicant, provided that the bylaws of the association or organization provide that a subscription is part of the association or organization dues or payment of each member or contributor, and the publisher agrees at the time of making application that the stipulation as set forth will be complied with no later than the beginning of the second membership year following the period covered by the initial audit. If compliance is not accomplished within this established time limit, the publication may be advised that a reclassification of the subscriptions is required.

Article 103

E 103.1 Initial Audit

(a) The initial audit of a farm publication may be made for any period covering at least one issue.

(b) Any publication having its initial audit for a period ended other than June 30 or December 31 shall have its next audit conducted for a period ended June 30 or December 31 to align with standard audit periods.

Article 104

E 104.1 Publisher's Statements

(a) For all publications, the semiannual publisher's statements shall cover the periods from January 1 to June 30 and July 1 to December 31.

(b) On an optional basis, statements may also be filed for any calendar quarter.

(c) Farm publications shall report the total paid (total of subscriptions and single-copy sales), qualified nonpaid circulation and nonqualified circulation on an issue-by-issue basis in the average circulation by issue paragraph of publisher's statements.

Article 105

E 105.1 Geographic Analysis

(a) Circulation may be broken down by states or provinces for one or more issues published within each six-month publisher's statement period.

A count and analysis shall be made of at least one issue published in each audit period. The figures used in the following publisher's statement may be based on the percentages for each state as determined from the issue or issues analyzed, and these percentages shall be projected against the total of the issue or issues to be reported.

Any publisher has the option to make a count and analysis of an issue for each publisher's statement if he desires to do so.

(b) Every United States publication with a circulation of 35,000 or more in Canada shall be required to analyze its Canadian circulation by province.

2025 Bylaws & Rules Book – Canada

(c) Subscription copies directed to members of the armed forces or to affiliated civilian personnel where the ultimate destination is unknown shall be reported in the geographical analysis opposite the classification "Military or Civilian Personnel Overseas."

E 105.4 Distribution by Demographics

A demographic edition of a publication shall be considered those copies of a publication which are directed to a group of subscribers with similar demographic characteristics, for whom the publisher has obtained individual demographic information. Copies of a publication which do not meet this definition but are distributed by selected geographical areas shall not be considered a demographic edition.

Publishers may include in the demographics paragraph of farm publication audit reports and publisher's statements an analysis for one issue of the total paid subscription and qualified nonpaid recipient circulation identifying the subscriber/recipient by degree of farm interest and/or by involvement in farming or other applicable demographics.

(a) The data shall be compiled by the publisher and verified by AAM auditors and shall be based on an actual count and analysis of the mail circulation for the issue analyzed.

(b) The classification assigned by the publishers must be based on information obtained from business cards, letterheads, recognized directories, questionnaires, subscription orders, telephone interviews or other acceptable evidence.

(c) The reporting format shall be by paid, qualified nonpaid and total and must be by breaks shown in standard United States Census of Agriculture. The format for each publication will be approved by AAM in advance of its first publication in AAM reports. National or regional agriculture census data may be reported in addition to the publisher's data. The reporting of a percentage for each category and a cumulative percentage is also optional.

Where questionnaires are used to obtain specific information concerning a subscriber's job function, the questionnaire shall be written so as to determine the most important or primary interest in the field served by the publication.

All such data must be carefully preserved for the auditor's examination. AAM reserves the right to subject the assigned classifications to verification letter tests if, for any reason, the evidence produced is not considered to be sufficiently conclusive.

In the event of a change in census data reporting, publishers will have until the seventh publisher's statement from the census release date to make the change within their demographic reporting.

Age of information used for classification purposes shall be reported.

E 105.5 Source Analysis

(a) Age of source data may be reported for the publication's circulation qualifying as nonpaid and paid.

(b) The issue analyzed must be the same as used for the geographic analysis. No information may be used for classification purposes that was obtained after the publisher's statement filing deadline.

(c) The analysis may be made in total or by age of the source document (one, two and three years) for each nonpaid circulation to field served category for which circulation averages are reported.

If paid circulation is analyzed, publishers shall allocate paid circulation to nonpaid source categories according to the following criteria:

Individual subscriptions to direct request;

Membership Benefit subscriptions (if deductible from dues) to direct request;

Membership Benefit subscriptions (if nondeductible from dues) to communication other than request;

2025 Bylaws & Rules Book – Canada

Multicopy subscriptions to communication other than request.

(d) A count and analysis shall be made of one issue in each audit period. The figures to be used in connection with the following publisher's statement shall be based on the percentages for each category as determined from the analyzed issue, and these percentages shall be projected against the total circulation of the issue to be reported.

Article 106

E 106.1 Renewals

Publishers making a claim of any renewal percentage shall be required to submit such claim to AAM for reporting in the notes section of the report with full detail of the methodology of the claim. Documentation supporting the claim must be available for audit.

Article 107

E 107.1 Deferred Subscriptions

The deferred subscription plan is that by which subscribers receive the publication late by a month or more, being served from returns. If at least one cent is paid for such subscriptions, they shall be classed as Individually Paid.

E 107.2 Back Copies

(a) An issue of a publication shall be considered a back copy immediately upon the appearance for sale of the next issue.

(b) Back copies served in connection with a subscription sold during or up to 30 days after the end of the regular publisher's statement period shall be recognized as paid up to three months preceding the date of the order, provided the subscription offer has specifically included the offer of back copies, or the subscriber has requested a back dating of the subscription, and provided consecutive copies are served and are paid for in accordance with rules governing a paid subscriber.

(c) In all other scenarios, credit shall be allowed only for copies served which do not date back beyond one issue previous to the issue current on the date of the order for publications other than weeklies, or beyond two issues previous to the issue current on the date of the order for weekly publications.

(d) Back copies sold for export to international countries for distribution abroad shall not be included in paragraph 1 of publisher's statements and audit reports.

(e) Single-issue sales of back copies shall be recognized as paid for a period of three months following the on-sale date of an issue provided the purchaser has specifically ordered the back issues.

2025 Bylaws & Rules Book – Canada

Article 108

E 108.1 Premium Defined

(a) Premiums are anything offered to a subscriber at time of solicitation, in addition to regular issues of the publication itself, and shall be reported in AAM reports as a premium, regardless of whether they are given with or without additional payment above the subscription price and whether or not they are given only to new subscribers or to all subscribers. In addition, any presentation to current subscribers which, in the opinion of the managing director, implies future receipt of premiums in conjunction with continued (or future) subscriptions will cause renewal subscriptions to be judged as premium induced. The number of subscriptions, whether new or renewal, involving such premiums taken during any period for which publisher's statement is filed shall be reported in the paragraph designated for that purpose and the nature of the premium.

Premiums are anything except:

- (1) Complete issues of farm publications sent to all subscribers for the period included in the offer.
- (2) Free or discounted access to archive or back content of the publication included as part of the subscription to the publication.
- (3) Free or discounted access to the publication's website.

E 108.2 Premiums with Subscriptions/Single-Copy Sales

(a) When a premium is used in connection with a subscription or single-copy sales offer or implied to current subscribers in conjunction with continued or future subscriptions, the full value of the premium, whether stated or not, must be collected. The value of the premium is the actual cost to the publisher, the recognized retail value, or the represented value, whichever is highest.

In those situations where the cost to the publisher is used to calculate the premium value, set-up costs and shipping and handling fees to the publisher from the manufacturer shall not be considered.

E 108.3 Premiums with Combination Sales

When a premium is used in connection with a combination of farm publications the amount paid by the subscriber must not be less than the value of the premium plus one cent per publication.

E 108.4 Subscription/Single-Copy Sales in Combination

(a) A "forced" combination is defined as two or more publications offered or sold together for an amount less than the total of the basic prices of all the publications (as determined by E 101.1) and wherein all publications intend to qualify the distribution as paid circulation, except when it is clearly made known to the purchaser that each of the publications may be purchased individually at the same price as if purchased as part of the group.

(b) When subscriptions for two or more publications are ordered or sold in combination by any means the amount paid by the subscriber must not be less than one cent per publication.

(c) The amount of money to be allocated to each title in the combination sale offer for purposes of classification of the sales compared to basic prices (see E 101.2) shall be based on the offer presentation itself, if it includes references to the value of each subscription in the combination sale (the sum of which must total to the selling price for the combination sale), or, if no such presentation is made, shall be based on the pro rata of each publication's basic price to the sales price.

(d) Existing and renewing subscribers may qualify as paid provided the offer to add on the combination publication requires an affirmative act on the part of the subscriber and incremental payment beyond the rate of the existing contract, or an option to reduce the rate of the existing

2025 Bylaws & Rules Book – Canada

contract if the offer is declined. The amount of incremental payment or reduction of rate from the existing contract must be clearly disclosed, and must be at least a qualifying amount as defined by the publication paid circulation defined rules. Promotional materials shall not imply or suggest that the add on farm publication is free or at no additional cost.

E 108.5 Credit Subscriptions

(a) A subscription that is sold on a promise-to-pay basis shall be regarded as a credit subscription. These subscriptions will qualify as paid circulation provided:

(1) The subscriber pays the sum billed if that sum is at least one cent, net of all other considerations.

(3) The amount charged is sufficient to meet the requirements of AAM's rules in all other respects.

(b) If the publisher cancels the subscription because of nonpayment, the number of copies served shall be established and deducted from paid circulation.

(c) Copies deducted from paid circulation because of nonpayment should be reported as nonqualified nonpaid.

(d) To qualify as paid circulation, payment must be made within six months after start of service.

Article 109

E 109.1 Extensions Because of Price Reduction

In the event of a reduction in the basic subscription price of a publication the unexpired portion of a subscription which was paid for at the higher price may be extended in the ratio that the value of such unexpired portion at the old price bears to the new subscription price for such unexpired period.

E 109.2 Extensions Because of Reduction in Frequency

If a publication reduces its frequency of issuance the expiration dates of all unexpired subscriptions appearing on the list at the time such change becomes effective may be extended to a date which would enable the delivery of the same number of copies originally ordered and promised.

E 109.3 Transfers Due to Purchase of Subscription List, Cessation of Issuance or Merger

When a publication transfers subscriptions to another publication due to purchase of a subscription list or merger of the publications, the subscribers of the transferring publication served with copies of the going publication may be included in AAM reports in paid circulation under the following conditions:

(a) The merged publications must be homogeneous.

(b) In the case of publications of predominantly local appeal, both publications must have been published in the same community.

(c) The number of issues to be credited as paid circulation on an unexpired subscription shall, at the option of the publisher, be ascertained by one of the following methods. The decision shall be subject to approval by the managing director.

(1) By dividing the sum of money still due the subscriber at the publisher's suggested annual subscription price of the discontinued publication by the price per copy of the surviving publication.

2025 Bylaws & Rules Book – Canada

(2) By counting the number of copies of the discontinued publication still due the subscriber and crediting the same number of copies of the substituted publication as paid.

(d) Not more than six months may elapse between the cessation of service to the subscriber of the publication subscribed for and the beginning of service by the publication substituted therefor.

(e) If the option is given to the subscriber of receiving in cash what is due on the old subscription but the subscriber chooses to be served instead with copies of the purchasing publication and authorization to serve the publication instead of the cash is satisfactorily established in the judgment of the managing director, the subscription shall be counted the same as if the subscriber had subscribed for the purchasing publication in the first place, subject to provisions of paragraph (c) of this rule.

(f) The first publisher's statement following the transfer shall provide an explanatory identifying the publication purchased and the average circulation served during the statement period from the purchased publication.

Article 110

E 110.1 Optional Subscription Sale Analysis

Subscription sales that occurred in the reporting period may be analyzed in detail by term, channel and premium usage at the option of the publisher in AAM's standard format.

E 110.2 Separate Editions

The circulation of a separate edition of a member farm publication may be included in AAM reports, either print or digital format, provided the edition carries the same publication name, logotype and is editorially homogeneous with the member publication.

In addition to the circulation of the edition being included in the total circulation claim by the publisher, separate reporting will be made in the paragraph devoted to Average Circulation of Regional and Demographic Editions.

E 110.3 Digital Editions

(a) A digital edition is defined as a product distributed via electronic/digital means that maintains the basic identity of the host publication either by maintaining the same name/logo or by identifying itself as "an edition of _____," but may contain different editorial and/or advertising content.

Digital edition circulation must be reported separately in publisher's statements and audit reports.

(b) Average qualified digital edition circulation shall be reported separately in average circulation by issues, business analysis, age of source, mailing address analysis and geographic analysis paragraphs of AAM reports.

(c) Digital editions may not be comprised of a newsletter/e-newsletter or unrestricted website access.

(d) Email notification must be made to designated recipients for subscriptions purchased in bulk by third parties.

For nonpaid subscriptions email notification to the subscriber of the product's availability on the restricted access website qualifies as delivery.

2025 Bylaws & Rules Book – Canada

(e) Digital edition-only subscribers shall be required to provide a land address for reporting purposes in the geographic analysis. Digital edition-only subscribers who do not provide a usable land address shall be reported as “email address only.”

(f) Paid and nonpaid copy deliveries resulting in “bounce backs” may be included in qualified circulation for a limited time frame provided the delivery issue associated with the bounce back is rectified, or the subscriber is purged from the subscriber file in accord with the following scale:

Hard Bounces: daily – ten issues; weekly – four issues; biweekly – two issues; and monthly – one issue.

Soft Bounces: daily – sixty issues; weekly – twelve issues; biweekly – six issues; and monthly – three issues.

A soft bounce occurs when the individual’s email address or online library is valid. However, there is an issue preventing the digital issue from being delivered (i.e., the mailbox or library is full and cannot accept delivery until space is available).

A hard bounce occurs when the individual’s email address or library is no longer valid at all (i.e., closed or deleted).

(g) Midterm conversions from print only to digital only may be completed at the publisher’s discretion provided the subscriber has the opportunity to opt-out of the conversion and retain the print subscription or terminate the subscription altogether.

(h) Paid multicopy sales and license agreements may be reported as qualified circulation in AAM reports provided the purchaser pays a qualifying price for each subscription.

E 110.4 Multi-Title Digital Programs

Sales generated from programs wherein the consumer makes purchase of a subscription to receive multiple-title access to digital issues being offered shall be reported on AAM reports as multi-title digital.

(a) Copies generated as a result of this program shall be classified as paid circulation provided the consumer has made payment for participation.

(b) Proof of access shall be required for the issue to be claimed as circulation.

(c) Standard reporting of analytics shall be made: average quantity of unique opens, average number of times opened and average total copies per board requirements.

Article 111

E 111.1 Nonpaid Direct Request Circulation

Nonpaid direct request circulation may be reported in circulation claims provided the following requirements are met:

(a) Nonpaid direct request order documentation must be retained for audit.

(b) Orders placed directly by the recipient must provide evidence of the origin of the order. This is typically made through a signature on request or answering a question of “Yes, I wish to receive the publication/No, I do not wish to receive the publication.” For paperless request, sufficient evidence must be retained to support the transaction.

2025 Bylaws & Rules Book – Canada

(c) Orders requested by corporations for their employees must include individual names to who the request is being made for on their behalf.

(d) All nonpaid direct request order documentation must have a date assigned by either the requestor or electronic means.

Consult AAM's website for specific detailed requirements and samples of eligible requests.

(e) Nonpaid subscription requests must be renewed at least once every 36 months.

(f) The recipient must be in the field served by the publication.

E 111.2 Nonpaid Circulation Other Than Direct Request

(a) Nonpaid circulation other than direct request may be reported in reports provided the recipient is in the field served by the publication and the age of the source documentation does not exceed 36 months and the supporting source documents are available for auditors examination.

(b) Recognized industry directories may be used as a source of qualified nonpaid circulation. Directories must be adequately identified.

(c) Lists of qualified recipients may be reported as qualified nonpaid circulation. Such lists must be dated and identified.

(d) Nonpaid qualified subscription orders obtained through telephone interviews initiated by publisher or publisher's representatives may be reported as telecommunications circulation. Telephone interview forms must have been signed and dated by the interviewer. The interviews shall, for verification purposes, include a personalized question which only the recipient is likely to be able to answer, such as date of birth or mother's maiden name. Different questions must be used when requests are renewed and all personalized questions shall be subject to approval by AAM.

(e) Written communication from qualified recipient or recipient's company, which do not meet the direct request criteria may be reported in qualified nonpaid circulation.

(f) Paid subscriptions that are not renewed may at the option of the publisher be reported as "Other Sources" in AAM reports provided nonpaid copies are served as follows:

(1) Publications issued monthly or less often must serve recipient every issue for at least six consecutive months; or

(2) Publications issued more often than monthly must serve recipient at least six consecutive issues, but not less than three consecutive months of service.

E 111.3 Multiple Subscriptions

Publishers who use order forms or accept letters whereby more than one publication is offered, may count these subscriptions as direct request or telecommunications, provided the following conditions are present:

(a) The publications must be homogenous with comparable definitions of field served.

(b) On written qualification forms, there must be a separate signature for each title ordered. For telecommunications orders, only one personal identifier question needs to be asked for all titles ordered.

(c) For written qualification forms or telecommunication orders, demographics need only be requested once for all titles ordered. Only one date is required.

(d) The text of the telecommunication script must disclose that multiple titles are being offered.

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(e) A one-sentence description of the editorial content differentiating the publications must be included on the telecommunication script or qualification form. In addition, written qualification forms must include the logo of each publication next to the signature line to increase awareness among subscribers.

E 111.4 Additions and Removals

Publishers who report qualified nonpaid circulation may include in the circulation by issue a count by issue of the additions and removals from lists of recipients of nonpaid circulation by issue.

E 111.5 Nonpaid Multicopy Same Addressee Circulation

(a) Nonpaid multicopy same addressee circulation is circulation delivered to designated addressees for redistribution to recipients unknown to the publisher. Sufficient documentation to support distribution records must be kept on an issue-by-issue basis and retained for the auditor's review.

(b) Reports shall make no inference as to their final disposition.

(c) Nonpaid multicopy same addressee circulation may be reported in reports provided primary recipient (addressee) is in the field served by the publication and the age of source documentation does not exceed 36 months.

(d) Circulation may be classified by business and industry based upon the primary recipient's (addressee's) demographic data. In these situations, the primary recipient (addressee) must provide satisfactory evidence to support the classification. Classification by title and occupation shall be included as "Other."

(e) Nonpaid multicopy same addressee circulation initiated by a request from the primary recipient (addressee) shall be reported as "Direct request from recipient's company" in the age of source paragraph. Other acceptable sources are business directories, lists, and other sources.

(f) Nonpaid subscriptions delivered in bulk to corporations for their own employees are not subject to the provisions of this rule provided the records show that copies are addressed and mailed to individuals. If the copies are mailed in bulk, satisfactory documentary evidence must be maintained in the publisher's office showing that such copies are for distribution to employees.

Article 112

E 112.1 Special Issues

Special issues are those issues published in addition to the regular frequency in which editorial content differs from the subject material of issues regularly published.

Special issues shall be reported in the average circulation by issues paragraph only with a footnote that the circulation is not included in the averages shown in paragraph 1.

A nonpromotional explanation of special issues may be shown in the paragraph devoted to general explanations, subject to the provisions of Rule B 103.4.

2025 Bylaws & Rules Book – Canada

CHAPTER F: CONSUMER MAGAZINES

Article 101

F 101.1 Paid Circulation Defined

In all situations paid circulation, either single copy or subscription is hereby defined to be copies of publications which have been paid for by the purchasers at not less than one cent, net of all considerations,

(a) Post-expire copies, which are copies served after an expiration date, may be included in paid circulation for a period of up to 3 consecutive months immediately following the expire date. For publications that have a break in service, e.g., published only during the winter months, the subscriber may receive post expire service of up to three consecutive months, immediately following the expiration date, not including the period the publication was not published.

Post-expiration copies, if served, must be distributed prior to the distribution of the next regularly scheduled issue.

(b) Subscriptions to any publication received as a result of an offer by a publisher that stipulates that part of the subscription term is free will qualify for inclusion in paid circulation only when a contractual agreement exists for the full term of the subscription. Without such contractual agreement, those copies which a subscriber is informed are free shall not qualify as paid circulation and instead shall be reported as non-analyzed nopaid circulation.

(c) Subscription resulting from offers based upon the assumption that the offer has been accepted unless specifically declined shall qualify as paid only upon satisfactory evidence that money has been collected from the recipient to qualify the subscription.

F 101.2 Prices

(a) Publisher-suggested prices (subscriptions and/or single copy) are the prices at which the publication may be purchased by anyone, at any time, for a definite duration. Publisher's suggested prices shall be reported in the semi-annual publisher's statement.

(b) In situations where a publisher changes single-copy price during the publisher's statement period, reporting in the semiannual publisher's statement shall be the average of all issues' single-copy cover price published in the period.

F 101.3 Average Price

(a) Magazines distributed primarily within North America shall be required to report average per-copy prices and average annualized prices in reports.

(b) The average per-copy price shall reflect the average of total gross subscription copies (excluding sponsored sales) sold in the publisher's statement period and total gross price paid. The annualized price shall reflect the annual frequency of the publication in effect for the publisher's statement period.

(c) If a magazine has in excess of 10 percent international circulation, the average price reported in the statement shall exclude international sales. As an option, average price inclusive of international sales may be made in the notes section of reports.

(d) Circulation categories other than individually paid shall have the amount of money paid reflected in average price as follows:

- (a) For qualifying Partnership Sales, the value identified as "deductible" will be included in the average price calculation and indicated in the paragraph of AAM reports reporting the average subscription price.

2025 Bylaws & Rules Book – Canada

- (b) For combination sales, the amount of money to be allocated to each title in the combination sale offer for purposes of calculating average per-copy prices shall be based on the offer presentation itself, if it includes reference to the value of each subscription in the combination sale (the sum of which must total to the selling price for the combination sale), or the amount to be charged incrementally or reduced from the existing contract or renewal in an add on offer, or if no such presentation is made, shall be based on the pro rata of each publication's publisher's suggested price to the sales price.
- (c) For Membership Sold Subscriptions, the amount of money identified as being allocated for the title will be included in the average price calculation.
- (d) For Award Point sold Subscriptions, the amount of money to be included in the average price will be the established per point value multiplied by the number of points redeemed by the subscription for the title.

(e) Sales from Multi Title Digital programs should be excluded from the publications average price subscription reporting.

(f) For publications newly admitted to membership the analysis shall be mandatory no later than the third publisher's statement issued following release of the initial audit.

(g) If an audit report shows discrepancies in the average price of more than 10 percent between the auditor's findings and the publisher's statements, the subsequent two publisher's statements released after the audit shall repeat from the last preceding audit report the facts concerning said discrepancies in the notes section of reports

Article 102

F 102.1 Sponsored Sales

(See also Article 117 – Digital Issues)

(a) All copies or subscriptions purchased in quantities of 11 or more, which in the opinion of the managing director promote the professional or business interests of the purchaser, and are delivered to private residences or business offices and intended for the personal consumption of the addressee, shall be considered sponsored subscriptions or single-copy sales.

(b) Quantity sales shall be set up as sponsored sales only if the purchaser pays the publisher or publisher's agent amounts required by F 101.1. In those instances where an agent develops a sponsored sales program involving more than one publication, the sponsor must demonstrate their selection of the specific publications they wish to purchase.

In addition, the purchasers involved in agent-developed programs must provide, directly to AAM, an attestation of their understanding of the purchase agreement and their primary business reason for making the purchase.

(c) Each household scheduled to receive a sponsored copy must be notified as to who the sponsor will be and the term and the frequency of the delivery. Such notification should not be promotional in nature.

(d) Sponsored sales sold on a promise-to-pay basis must be paid within four months of the start of service.

(e) Qualified purchasers of sponsored sales shall be defined as businesses or individuals having a consumer presence. Third-party subscription selling organizations or other vendors to the publication circulation industry shall not be recognized as qualified sponsored purchasers.

(f) Post-expiration served on sponsored subscription copies shall be excluded from paid circulation and included in nonpaid distribution.

2025 Bylaws & Rules Book – Canada

(h) The average number of copies, both subscription and single copy, shall be reported separately on reports. The publication may report additional details surrounding the program and type of distribution made in the notes section of reports.

(i) The subscriptions involved in a quantity sale made to an individual, group of individuals or corporation, which have a financial interest in the publication, shall not be included in sponsored sales but shall be included in nonpaid circulation, unless it can be proved to the satisfaction of the managing director that the sale was made for the benefit of the purchaser and not for the benefit of the publication.

(j) Subscriptions purchased in quantities by corporations, institutions or individuals for their own employees, subsidiary companies or branches and third party purchased subscriptions for military personnel may be eligible for reporting as sponsored sales provided a qualifying amount is paid.

(k) Copies purchased for distribution to schools shall be included in paid – sponsored copies. Copies may be purchased individually by the recipients or paid for by schools.

F 102.2 Gift Subscriptions

(a) A gift subscription shall be considered one which is given as a normal expression of friendship and which does not promote the business or professional interests of the donor. Gift subscriptions are limited to 50 subscriptions per donor and paid in accordance with F101.1. Quantity purchases greater than 50 would be considered sponsored sales and subject to Rule F 102.1.

F 102.3 Membership Sold Subscriptions

(See also Article 117 – Digital Issues)

(a) A member of an association, organization, club or publisher brand membership program who receives a publication because of said membership, and at least one cent is paid for the subscription as part of the dues, contribution, assessment or by the member themselves shall be designated as Membership sold subscriptions.

Subscriptions to a privately-owned publication purchased by an association, organization or society, which does not submit its records to audit by AAM, shall be included in sponsored sales subscriptions, provided qualification criteria to sponsored subscriptions are met.

Individuals becoming a member or contributor of an association, club or organization must be notified that dues or payment includes a subscription to the publication, and the amount of the dues or payment allocated for payment of the subscriptions. On every bill for dues, payment or contribution, the amount allocated for payment of the subscription must be stated.

(b) The foregoing provisions of the above paragraph (c) shall not apply to an applicant, provided the benefits of membership shared with the consumer notate a subscription is part of the membership and the publisher agrees at the time of making application that the stipulation as set forth will be complied with no later than the beginning of the second membership year following the period covered by the initial audit. If compliance is not accomplished within this established time limit, the publication may be advised by AAM a reclassification of subscriptions is required.

(c) The publisher may wish to make additional disclosure regarding the membership sold subscriptions identifying the amount being allocated in dues for the magazine, if the magazine allocation is deductible or not deductible from dues, and other non-promotional references in the Notes section of reports.

2025 Bylaws & Rules Book – Canada

F 102.4 Partnership Sales

(See also Article 117 – Digital Issues)

(a) Partnership sales involve the bundling of a magazine (either a single copy or a subscription) with other goods or services. At the point of sale, the consumer must be advised that the magazine is included along with the good or service and informed of the amount allocated for the cost of the magazine. This amount must be in accord with Rule F 1.101.1; how to obtain a refund in lieu of receiving the magazine and an outline of either cancellation policies and/or auto-renewal practices that are applicable to the magazine subscription. All disclosures must be made in clear and reasonable language. The refund process must be simple to execute and the refund must be for the same amount as the “allocated” value

Consult AAM's website for specific requirements regarding notification requirements to the consumer and refund processes.

Article 103

F 103.1 Initial Audit

See also B 102.6.

(a) The initial audit of a consumer magazine may be made for any period covering at least one issue.

(b) Any publication having its initial audit for a period ended other than June 30 or December 31 shall have its next audit conducted for a period ended June 30 or December 31 to align with standard audit periods.

Article 104

F 104.1 Timing of Audit

(a) All consumer magazine members of AAM shall undergo an audit on a continuous basis, with a release of an Audit Report every 24 months, ended June 30 or December 31.

F 104.2 Publisher's Statements

(a) The semiannual publisher's statement shall cover the periods from January 1 to June 30 and July 1 to December 31.

(b) Publisher's Interim statements may be filed for any month ending period at the request of the publisher.

(c) All publisher's statements submitted to AAM for publication shall be accompanied by forms and schedules as deemed necessary by the managing director. Failure to submit necessary information in a timely manner may result in suspension of report services, inclusive of snapshot.

(d) Publishers using the four-week, 13-month calendar billing system may report the circulation averages for the 13-week and/or 26-week period nearest the end of the calendar quarter.

2025 Bylaws & Rules Book – Canada

Article 105

F 105.1 Geographic Analysis

(a) An analysis of a publication's print paid, verified and analyzed nonpaid bulk circulation in the AAM established format shall be made by provinces based on an issue within the audit period.

The figures to be used in connection with the following period may be projected against the total for the issue to be reported, based on the percentages for each province as determined from the issue analyzed

(b) The circulation of magazines distributed through retail outlets shall also be analyzed by provinces,

(c) Every Canadian publication with 70,000 or more circulation in the United States shall be required to analyze its United States circulation by state.

(d) Digital issue circulation of the publication shall not be analyzed by geographic location but included as a line item.

F 105.2 Distribution by Counties

Magazines may, at their option, include as a supplement an analysis for an issue of total paid, verified and/or analyzed nonpaid bulk circulation by Census Metropolitan Areas (CMA's) and by Census Agglomerations (CA's) of 50,000 and over population.

(a) Data shall be compiled by publishers and verified by AAM auditors and shall be based on actual counts made once every audit period for subscription, single copy and analyzed nonpaid circulation. Single-copy sales may be determined by applying regional or national return percentages to gross distribution. The sales percentages of the newsstand distribution of the analyzed issue must be representative of other issues in the publisher's statement period.

(b) All analyses shall be based on the most recent population analysis data prepared by AAM.

(c) Counties (or the equivalent) shall be listed alphabetically by province and by county within each province.

(d) The publisher may show only those counties in which paid and verified circulation totals 25 copies or more and include a balance in province figure for the remainder.

F 105.3 Distribution by Demographics

A demographic edition of a publication shall be considered those copies of a publication which are directed to a group of subscribers with similar demographic characteristics, for whom the publisher has obtained individual demographic information.

Publishers may include as a supplement an analysis for one issue of the total paid and verified subscription circulation identifying the subscriber by business and industry and/or by title or job function.

No information may be used for classification purpose which was obtained more than three years prior to the date of issue on which analysis is made.

2025 Bylaws & Rules Book – Canada

Article 106

F 106.1 Renewals

Publishers making a claim of any renewal either to advertisers or through advertising materials shall be required to submit such claim to AAM for reporting in the notes section of the report with full detail of the methodology of the claim. Documentation to support the claim must be available for audit.

Article 107

F 107.1 Deferred Subscriptions

Under the deferred subscription plan, individual subscribers receive a publication one month or more after the on-sale date. These issues are served from returns. If subscribers pay a qualifying price, these subscriptions are classified as individually paid.

F 107.2 Back Copies

(See also Article 117 – Digital Issues)

(a) An issue of a publication shall be considered a back copy immediately upon the appearance for sale of the next issue for newsstand copies and the mailing of the next issue for subscription copies.

(b) Back copies served in connection with a subscription offer shall be recognized as paid up to three months preceding the date of the order, provided the subscription offer/order has specifically included the back copies, and provided consecutive copies are served.

(c) Copies served to verified public-place sources are not eligible for service of back copies.

(d) Copies served to verified and sponsored individual-use recipients where the recipient did not request the publication through direct request are not eligible for service of back copies.

(e) A new print subscriber who has not specifically ordered back copies as part of a subscription is eligible to be served one issue preceding the issue being mailed for bi-monthly and monthly published publications. Two issues may be served for publications of greater frequency. Such copies may be included in paid circulation.

Single issue sales of back copies shall be recognized as paid provided the purchaser takes affirmative action to make the purchase of a specific issue.

F 107.3 Collection Stimulants

(a) Any inducement offered for prompt payment subsequent to the receipt of a subscription order is a collection stimulant and must be taken into consideration for the qualification status of the subscription.

2025 Bylaws & Rules Book – Canada

Article 108

F 108.1 Premium Defined

(a) Premiums are anything offered to a subscriber at time of solicitation, in addition to regular issues of the publication itself, and shall be reported as a premium, regardless of whether said extraneous thing be given with or without additional payment above the subscription price and whether or not such extraneous thing is given only to new subscribers or to all subscribers. In addition, any presentation to current subscribers which, in the opinion of the managing director, implies future receipt of such extraneous things in conjunction with continued (or future) subscriptions will cause renewal subscriptions to be judged as premium induced.

Premiums are anything except:

- (1) Complete issues of newspapers or periodicals sent to all subscribers for the period included in the offer.
- (2) Merchandise offered to current paid subscribers as an inducement to convert payment methodology on future subscriptions. Such offers are to be made separate from subscription renewal efforts and are limited to inducements to subscribers to agree to ongoing (til forbid) continuous service which may include automatic billing process and/or debits to authorize credit card accounts.
- (3) Free or discounted access to the publication's website.
- (4) Free or discounted access to archive or back content of the publication included as part of the subscription to the publication.

F 108.2 Premiums with Subscriptions/Single-Copy Sales

(a) When a premium is used in connection with a subscription or single-copy sales offer or implied to current subscribers in conjunction with continued or future subscriptions, the full value of the premium, whether stated or not, must be collected. The value of the premium is considered to be the actual cost to the publisher, recognized retail value, represented value, or comparable value whichever is highest. In those situations where the cost to the publisher is used to calculate the premium value, set-up costs and shipping and handling fees to the publisher from the manufacturer shall not be considered.

F 108.3 Premiums with Combination Sales

When a premium is used in connection with a combination of other magazines and other publications (newspaper, business publication, farm publication) the amount required to be collected is at least once cent per publication included in the offer plus the value of the premium as determined above.

F 108.4 Subscription/Single-Copy Sales in Combination

- (a) A "forced" combination is defined as two or more publications offered or sold together for an amount less than the total of the publisher's suggested prices of all the publications and wherein all publications intend to qualify the distribution as paid circulation, except when it is clearly made known to the purchaser that each of the publications may be purchased individually at the same price as if purchased as part of the group.
- (b) When subscriptions for two or more magazines, or magazine(s) and another publication(s) (newspaper, business publication, farm publication) are ordered or sold in combination by any means the amount paid by the subscriber must not be less than one cent per publication.
- (c) Subscriptions/single-copy sales sold in combination shall be reported as individual sales in reports.

2025 Bylaws & Rules Book – Canada

- (d) Existing and renewing magazine subscribers offered a combination sale may qualify as paid under either of the two following conditions:
- (1) The offer to add on the combination publication requires an affirmative act on the part of the subscriber and incremental payment beyond the rate of the existing contract, or an option to reduce the rate of the existing contract if the offer is declined. The amount of incremental payment or reduction of rate from the existing contract must be clearly disclosed, and must be at least a qualifying amount.
 - (2) The offer to add on the combination publication requires notification to the subscriber and promotion materials shall not imply nor suggest that the add-on publication is free or at no additional cost. The amount being paid for all publications involved in the combination must be at least a qualifying amount.
- (e) Existing magazine subscriptions involved in ongoing ("til forbid") continuous service offered a combination sale may qualify as paid under the following conditions:
- (1) The offer to add on the combination magazine must require an affirmative act on the part of the subscriber; offers requiring the subscriber to decline the combined publications if it is not desired will not qualify the sale as paid circulation.
 - (2) The amount being paid for all magazines involved in the combination must be at least a qualifying amount.
 - (3) Promotion materials shall not state or imply that the add-on magazine is "free" or "at no additional cost."

F 108.5 Subscriptions Purchased with Award Points

- (a) Subscriptions acquired through the redemption of accrued award credits or loyalty points (e.g., frequent flyer miles, credit card member points) may qualify as paid circulation if the publisher presents satisfactory evidence that the cash value of the redeemed product or service is equivalent to one cent or more.

These loyalty programs require that the participant takes action to enroll in the program and record a specific volume of transactions to earn sufficient award credit for award points.

Consult AAM's website for specific requirements for program eligibility and requirements for inclusion of a magazine as an item for redemption.

(b) Reporting

Subscriptions obtained through the redemption of award points shall be reported in individual subscriptions with an explanatory providing the average number of copies served in the publisher's statement and audit report period.

F 108.6 Credit Subscriptions

- (a) A subscription that is sold on a promise-to-pay basis shall be regarded as a credit subscription. These subscriptions will qualify as paid circulation provided the subscriber pays the sum billed and that sum is at least one cent, net of all other considerations
- (b) If the publisher cancels the subscription because of nonpayment, the number of copies served shall be established and deducted from paid circulation.
- (c) Copies deducted from paid circulation because of nonpayment may be reported as verified individual use-direct request or non-analyzed nonpaid distribution.
- (d) To qualify as paid circulation, payment must be made within seven months after the start of service.

2025 Bylaws & Rules Book – Canada

Article 109

F 109.1 Extensions Because of Price Reductions

In the event of a reduction in the publisher's suggested subscription price of a publication the unexpired portion of a subscription which was paid for at the higher price may be extended in the ratio that the value of such unexpired portion at the old price bears to the new subscription price for such unexpired period.

F 109.2 Extensions Because of Reduction in Frequency

If a publication reduces its frequency of issuance the expiration dates of all unexpired subscriptions appearing on the list at the time such change becomes effective may be extended to a date which would enable the delivery of the same number of copies originally ordered and promised.

F 109.3 Transfers Due to Purchase of Subscription List, Cessation of Issuance or Merger

When a publication transfers subscriptions to another publication due to purchase of a subscription list or merger of the publications, the subscribers of the transferring publication served with copies of the going publication may be included in AAM reports in paid circulation under the following conditions:

- (a) The publications must be homogeneous.
- (b) In the case of publications of predominantly local appeal, both publications must have been published in the same community.
- (c) The number of issues to be credited as paid circulation on an unexpired subscription shall, at the option of the publisher, be ascertained by one of the following methods. The decision shall be subject to approval by the managing director.
 - (1) By dividing the sum of money still due the subscriber at the publisher's suggested annual subscription price of the discontinued publication by the price per copy of the surviving publication.
 - (2) By counting the number of copies of the discontinued publication still due the subscriber and crediting the same number of copies of the substituted publication as paid.
- (d) Not more than six months may elapse between the cessation of service to the subscriber of the publication subscribed for and the beginning of service by the publication substituted therefor.
- (e) If the option is given to the subscriber of receiving in cash what is due on the old subscription but the subscriber chooses to be served instead with copies of the purchasing publication and authorization to serve the publication instead of the cash is satisfactorily established in the judgment of the managing director, the subscription shall be counted the same as if the subscriber had subscribed for the purchasing publication in the first place, subject to provisions of paragraph (c) of this rule.
- (f) The first publisher's statement following the transfer shall provide an explanatory identifying the publication purchased and the average circulation served during the statement period from the purchased publication.

2025 Bylaws & Rules Book – Canada

Article 110

F 110.1 Separate Editions

(See also Article 117 – Digital Issues)

The circulation of a separate edition of a member magazine shall be reported to AAM and will be provided via the Media Intelligence Center analyzer data. The edition must contain the same publications name, logotype and be editorially homogenous with the member magazine.

Article 111

F 111.1 Advertising Rate Base or Circulation Guarantee

Reports shall include a statement pertaining to advertising rate base or circulation guarantee if such existed during the period covered by the report.

The default presentation of advertising rate base or circulation guarantee will be to total circulation.

Article 112

F 112.1 Special Issues

Special issues are those issues published in addition to the normal frequency of a publication in which editorial content differs from the subject material of issues regularly published; advertising is sold specifically for the special issue and the on-sale date overlaps the date of one or more regular issues.

Special issues shall be reported in the paragraph devoted to issue-by-issue circulation information only with a footnote that the circulation is not included in the total average circulation. A nonpromotional explanation of special issues may be shown in the explanatory paragraph, subject to the provisions of Rule B 103.4.

Article 113

F 113.1 Analyzed Nonpaid Bulk Defined

(See also Article 117 – Digital Issues)

Analyzed nonpaid bulk is circulation delivered to designated locations for redistribution to recipients unknown to the publisher. Records must be kept on an issue-by-issue basis to show gross and net distribution when applicable. The copy served must be the current subscription issue being distributed.

Publisher's statements and audit reports shall show copies distributed to designated areas but make no inference as to their final disposition.

2025 Bylaws & Rules Book – Canada

Article 114

F 114.1 Verified Circulation

(See also Article 117 – Digital Issues)

(a) Verified circulation shall consist of copies designated by publishers for readership in public places and to individual users who may have an affinity for the publication. All verified circulation recipients (individuals and public place locations) must be given the opportunity to opt-out of receipt if so desired.

(b) the copy served must be the current subscription issue being distributed.

(c) There are two subcategories of verified circulation: public place and individual use.

(d) Verified public place represents copies intended for use in waiting room locations, hotel rooms, for use by patrons of the business establishment at that location, and copies intended for distribution on aircraft or to airline clubs.

(e) The following criteria must be followed for qualification of verified public place copies

(1) Publishers or their vendors participating in public place programs shall make outreach to each business establishment at least once every 24 months and give the opportunity to opt out of receiving publications. Publishers or their vendors that have been certified by AAM for their public place management system are exempt from this requirement.

(2) No more than three copies of each issue of any magazine may be served to a public place location. However, no limit is placed on the total number of unique magazines that may be served to each public place location.

(3) Verified public place circulation must also be further classified into the following categories: Medical/Dental, Personal Care (including beauty and barber salons) and Other. Publisher may at their option further explain the Other circulation in the notes section of reports.

(4) Publishers have the option of reporting fees received from sponsor for copies reported under verified circulation provided adequate records maintained to verify amount received net of all considerations.

(5) Specific to hotel for in-room placement as public place locations, the following criteria apply:

i. Publications of monthly or less frequency may provide the maximum of four copies per hotel room to each hotel location.

ii. Publications of greater than monthly frequency may provide the maximum of one copy per hotel room to each hotel location.

iii. The publisher or publisher's agent must maintain a current contract with each hotel or responsible hotel corporate management. The contract is to be signed by an individual or senior management at the hotel. The contract needs to stipulate the hotel's agreement to participate, confirm the number of copies of each unique magazine to be provided and where with the hotel the copies will be placed. The contract must be renewed at a minimum of every 24 months

(6) Specific to airlines for aircraft or airline club locations to be reported as verified public place, the following criteria apply:

2025 Bylaws & Rules Book – Canada

i. The publisher or publisher's agent must enter into a formal agreement with the airline for the term of distribution. The agreement must be updated at least every 24 months.

ii. Upon request the airline must be able to provide an affidavit attesting that all magazines supplied to airlines were distributed by the airline and made available to its customers either on-board the aircraft or in club lounges.

(f) Verified individual use are those copies delivered to known individuals either through directly requesting the magazine by the individual or through recognized sources of individuals that may have an affinity for the publication.

(g) Verified individual use must also be further broken down by individually requested and other individually addressed.

(h) The following criteria must be followed for qualification of individual use subscriptions:

(1) Only one subscription per household may be reported as verified individual use.

(2) Copies originally reported as paid circulation and subsequently disqualified through the audit process are not eligible to be transferred by auditor to verified individual use rather would be reported nonpaid unless publisher can demonstrate to auditor that each individual recipient took affirmative action to specifically order the magazine at start of service.

(3) Individually requested circulation may be included as verified individually requested subscriptions provided it conforms to the following:

- i. The individual requesting the publication must specifically answer the question "do you wish to receive the magazine- YES____, NO____. Alternatively, the form can request the individual to sign if they wish to receive the magazine.
- ii. If the form used to solicit new subscriber does not include offers for other products or services and is to be completed by the recipient, the form is not required to contain the phrase asking whether or not the individual wishes to receive the publication.
- iii. The form must have either the individual complete their name and address or request their signature.
- iv. All requests must be within 36 months of age to be considered an individually requested subscriber.
- v. Request information must be retained and made available to the auditor.

(4) Other individually addressed circulation may be included as verified on reports provided the individual receiving the magazine is known by name and address.

- i. Sources used to obtain the name of the individual must be retained for auditor review (i.e., directories, list, etc).
- ii. Source used to obtain the recipient's name and address should be within 36 months of age to be considered for reporting as verified other individually addressed without additional recipient level information
- iii. If a source is utilized in excess of 36 months of age, satisfactory evidence must be made available to auditor confirming the intended recipient is still at the identified address and wishes to continue to receive the magazine.

2025 Bylaws & Rules Book – Canada

Article 115

F 115.1 Consolidated Media Report

Publisher may request a supplemental report consolidating AAM-audited data elements (i.e., circulation, e-newsletters, website activity, etc) under the following conditions:

(a) The various forms of media are homogeneous in terms of editorial content when compared to the host AAM member publications.

(b) The report shall clearly identify that the figures are gross and that no effort has been made to eliminate any duplication circulation/distribution/exposure.

Article 116

F 116.1 Network Audit Program

A single AAM membership may be held by two or more magazines provided the following criteria are met:

1. Each magazine in the network audit plan shall qualify for AAM membership.
2. Advertising must be offered as a combination sale for all magazines.
3. The editorial content must be homogeneous among all magazines in the group.

Article 117

F 117.1 Digital Issue Defined

A digital issue is an electronic magazine that maintains the same identity, name and logotype as the print. Digital issues available via restricted-access websites, mobile applications and other platforms are eligible for AAM reporting.

For inclusion in total average circulation, the digital issue must be considered a digital replica per AAM established guidelines

Consult AAM Website for specific criteria for a digital replica edition.

F 117.2 Digital Issue Subscriptions and Single-Issue Sales

Digital issue subscriptions and single-issue sales are eligible for inclusion in AAM reporting in accordance with Rule F 118.1 Digital Issue Defined and as outlined in the provisions below:

(a) Paid circulation

- (1) Digital issue subscriptions and single-issue sales are eligible as paid circulation if the consumer pays an amount in accordance with Rule F 101.1 Paid Circulation Defined.

2025 Bylaws & Rules Book – Canada

(2) When a subscriber is serviced with a bundle or both a print and digital issue of a magazine, only one circulation unit, unduplicated, may be included for AAM reporting.

(3) For partnership and membership sold subscriptions, a digital issue is only eligible as paid if the consumer requests it and all other program requirements are met as outlined in Article 2.

- A request is defined as an affirmative action to accept the digital issue.
- The consumer must be clearly presented with the name of the magazine, term, delivery platform and action needed to accept the digital issue.
- The request must be dated and annually reconfirmed by the recipient.
- The publication must provide proof of the digital requests and all other program requirements for the audit. For subscriptions where proof of the digital request is not made available, subscriber-level contact may be utilized to confirm the digital request

(4) For sponsored subscriptions and sponsored single-issue copies, a digital issue is only eligible as paid if the consumer requests it and all other program requirements are met as outlined in Article 2. In addition, the unique recipient has accessed the issue and proof of access is available in the audit.

(5) Back copies

- Single-issue sales of the digital issue are eligible for inclusion as paid single copy in accordance with F 107.2 Back Copies.
- Service of back copies for subscriptions are not eligible for inclusion in AAM reporting.

(b) Verified individual use

(1) Digital issue subscriptions are eligible as verified individual use in accordance with Rule F 115.2 Individually Requested Circulation

- A request is defined as an affirmative action to accept the digital issue.
- The consumer must be clearly presented with the name of the magazine, term, delivery platform and action needed to accept the digital issue.
- The request must be dated and annually reconfirmed by the recipient.
- The publication must provide proof of the digital requests. For subscriptions where proof is not made available, subscriber-level contact may be utilized to confirm the digital request.

(2) Free trial issues with 'til forbid subscriptions are permitted for inclusion as verified individual use.

(c) Conversion of print subscribers to the digital issue

(1) Digital issue copies served as the result of a publisher conversion from print to digital, are eligible for inclusion in AAM reporting if the consumer is asked and agrees to the conversion.

(2) If the subscriber is unresponsive or declines the conversion, the digital issue copies served are not eligible for inclusion in AAM reporting.

(d) Analyzed nonpaid bulk unrestricted access

(1) Only issues accessed by recipients are eligible for inclusion in AAM reporting.

(2) For the audit, the publication must support the quantity of unique individuals that accessed each issue and proof of access.

2025 Bylaws & Rules Book – Canada

F 117.3 Multi-Title Digital Programs

Sales generated from programs wherein the consumer makes purchase of a subscription to receive multiple title access to digital issues being offered shall be reported on AAM reports as Multi-Title Digital.

(a) Copies generated as a result of this program shall be classified as paid circulation provided the consumer has made payment for participation.

(b) Proof of access shall be required for the issue to be claimed as circulation

(c) Standard reporting of analytics shall be made per board requirements.

2025 Bylaws & Rules Book – Canada

POLICIES AND PRACTICES

All Members

AAM Policy Regarding the Copyrighting of Reports

(Also see Bylaw 3.7.)

To the Members of the Alliance for Audited Media:

The AAM board of directors recently proposed that the bylaws be amended to require that all publisher's statements and audit reports be copyrighted and carry a copyright notice.

The purpose of this amendment is to preserve AAM's legal rights and title under the United States and Canadian copyright laws. The enactment of the bylaws will protect AAM and the membership against illegal use of the publisher's statements and audit reports by those who are not members of AAM.

The proposed amendment will not, in any way, modify the long-standing policy of permitting AAM members to disseminate data for the benefit of advertisers, advertising agencies, and others interested in the advertising and publishing industry. Under the past policies, AAM obtained and retained title to all data supplied by and furnished to members. In exchange, AAM gave the members the legal right to use AAM's data, publisher's statements and audit reports in accordance with the terms and conditions set forth in the bylaws and publicity rules. All of the members were previously licensed by AAM to use the data. It is now proposed that publisher's statements and audit reports be added to the list of copyrighted material and used pursuant to the terms and conditions spelled out in the AAM rules of publicity.

The amended bylaw will specifically give the members the legal right, or license, to use the data, publisher's statements and audit reports in accordance with the AAM rules and bylaws and in accordance with the terms embodied in the publicity rules.

This continued policy of licensing the members is not intended to forfeit AAM's reservation of all rights under the copyright laws to pursue illegal infringement and third-party piracy. Although AAM has never allowed illegal dissemination of works in the past, the enactment of this amended bylaw will benefit both the members and AAM by insuring against unauthorized use by nonmembers of the data in publisher's statements and audit reports.

2025 Bylaws & Rules Book – Canada

All Publications

Publicity Policy for Member Publications

Publicity standards established by the board of directors of the Alliance for Audited Media are set forth in AAM bylaws and rules, Chapter A, Publicity Standards - All Publications. In general, the publicity standards are applicable to all figures, data or statements for which AAM authority is stated or implied.

The board knows that publisher members often wish to advertise or publicize unusual circulation values, supported by their own records but not audited or reviewed by AAM, or not required to be reported in AAM publisher's statements and thus not subject to AAM audit.

Therefore, in addition to the publicity standards, it is AAM policy, established by the board of directors, to ask all publisher members, in their publicity and promotion, to adhere to the spirit as well as the text of the publicity standards, whether or not AAM authority is stated or implied. Members are advised that a basic confidential review of planned publicity referring to circulation is available in advance upon request to AAM headquarters, without charge, to aid members in meeting both the requirements and the spirit of the publicity standards.

Publicity so reviewed and approved may carry the AAM insigne provided that figures not yet submitted to AAM, or not required to be submitted, are unmistakably identified as being presented by the author or publication and not by AAM.

Publicity of any publisher member may be examined by AAM at the request of any other member. Upon completion of such review, and whenever the publicity does not meet either the language of the standards or the ethics implicit in AAM membership, the managing director may notify the member upon whose behalf the publicity has appeared both of the requirements of the publicity standards and of this policy. He may refer to the board of directors for study and suitable action the promotion and publicity of the member which is deemed questionable under reasonable standards of fair and open competition.

NOTE: The statement asks publisher members to adhere to the spirit, as well as the text, of the publicity rules whether or not AAM authority is stated or implied in their publicity or promotion piece. This policy does not modify the publicity rules in chapter A.

Administrative Appeal to Board of Directors

From time to time, a publication may find itself in violation of an AAM rule or recordkeeping requirement, the result of which would be delay in processing an audit report or publisher's statement pending an appeal to the board of directors. In some of these situations, the nature of the recordkeeping deficiency or rule violation may be one for which precedent exists from a similar situation that has been previously reviewed and approved by the board of directors. In such cases, the member may elect to pursue an administrative review. If such a review is sought, AAM's president and managing director is authorized to extend the board's prior action with respect to these matters. In doing so, the president and managing director shall notify the chairman of the board and the chairman of the respective media committees of the authorization.

2025 Bylaws & Rules Book – Canada

Consumer Magazines

AAM Policy Regarding Magazines Sold With Event Admission Tickets

Definition:

A single copy of a magazine offered for sale in combination with admission fees and a subscription to a magazine offered for sale in combination with admission fees paid at the ticket counter of the event to any activities of a social or communal nature. Sales bundled with parking fees may also qualify as event sales provided the parking fee is the only admission fee associated with the event. In those situations where there are separate parking fees and admission fees, the parking facility will not qualify as an event.

Qualification Standards:

1. For single-copy sales, at point of purchase the consumer must be offered option to pay a reduced amount (full ticket price less amount allocated to the magazine) if the magazine is declined.
2. For single-copy sales, delivery of the magazine must occur upon entrance to the event.
3. For subscription sales, if the magazine subscription is declined, one of the following refund methods may be executed:
 - a. At point of purchase, the consumer is offered the option to pay a reduced amount (full ticket price less amount allocated to the magazine) if the magazine subscription is declined.
 - b. Delivery of information for consumer to process/request the refund occurs upon entrance to the event.
4. All admission signs at the event venue must make clear and conspicuous disclosure of the components of the sale, to include reference that the magazine is included in the cost of the admission, the magazine's allocated value and that the allocated value is refundable.
5. All rules governing paid circulation qualification must be followed.

2025 Bylaws & Rules Book – Canada

NEWSPAPERS

Established AAM Practice of Auditing Copies of Newspapers Sold Through Racks or Honor Boxes

AAM PRACTICE OF AUDITING SINGLE-COPY SALES

In reporting copies of newspapers sold through vending machines or honor boxes, it is recommended that a publisher divide the cash taken from the boxes by the retail price of the newspaper to determine the net sale.

However, it is recognized that publishers cannot always accurately determine net sales from a vending machine or honor box, because of underpayment from some copies and the fact that some copies may be stolen. Accordingly, it has been AAM's practice to permit a publisher to claim as paid circulation, all copies removed from the racks provided the publisher has made a serious effort to determine the accurate net sale by deducting all unsold copies and by making certain that a realistic sum of money is received from each rack.

AAM will consider that a realistic sum of money received from rack sales must average at least 75 percent of the basic retail price.

Auditing of single-copy sales shall be of a uniform standard, whether by sales or newsdealer, honor rack or vending machine. If it is necessary to substantiate the cash collections from the vending machine and/or racks or honor boxes, a spot check of the actual retail outlets shall be made.

APPLICATION OF THE POLICY

1000 copies distributed, 200 returns leaving 800 removed. $800 \text{ copies} \times 10¢ \text{ (single-copy price)} = \$80 \text{ total potential or } 100\%$.

(a) Collected \$70 — more than 75%, therefore, 800 qualify as paid.

(b) Collected \$50 — $75\% \text{ of } \$80 = \60 Difference \$10 — converted to copies at $.075¢ \text{ (75\% of the single-copy price)}$ per copy = 133
Removed from racks $800 \text{ less } 133 = 667 \text{ copies to be included paid.}$

From our experience, publishers using pay racks normally collect 80 percent to 95 percent of the total potential. Where collections fall below 75 percent of potential, consideration should be given by the auditor for a special check of sales and collections through racks.

NOTE: The policy applies only to the accounting of sales through vending machines or honor racks.

2025 Bylaws & Rules Book – Canada

Policy Relating to Carrier Delivery — Office Collect Subscriptions and Pay-in-Office Subscriptions on Independent Carrier Routes reported in Newspaper Quarterly Data Reports and Audit Reports

1. AAM policy permits a total allowance of 4 percent (of the total pay-in-office subscription base) for the aggregate of new credit subscriptions cancelled for nonpayment and for subscribers served short term arrears who paid at least 25 percent of the basic price for the term of the offer for carrier delivery office collect system and pay-in-office subscribers. Service of arrears copies beyond 90 days from date of expire do not qualify for inclusion in this allowance and cannot be included in paid circulation.

Newspapers served under these circumstances may be counted as paid circulation subject to the following provisions:

- (a) The subscribers are billed directly by the newspaper and the newspaper assumes all liability for collections.
- (b) The 4 percent provision applies only to new credit subscribers and short-term arrears copies served for a maximum of three months.
- (c) The subscribers involved represent bonafide orders that have contracted either verbally or in writing to have the newspaper delivered and have agreed to payment as defined in AAM Rule C 101.1 Paid Circulation Defined.
- (d) An explanation of the total copies served as a result of the 4 percent allowance is to be made in the paragraph devoted to general explanations in quarterly data reports and audit reports.
- (e) The newspaper maintains adequate records to prove the start date and stop date, if cancelled and paid status traceable to cash receipts for each individual subscriber. Cancellation reports and reports showing short term arrears service should be maintained listing the subscriber's name, address, start date, cancellation date and total copies served designating frequency of service.
- (f) It is assumed that all AAM rules defining paid circulation apply when reference is made to paid circulation.

2. The allowance for credit subscriptions cancelled for nonpayment and short-term arrears service as provided for by this policy does not apply to carrier collect systems unless AAM's auditor is able to determine the paid and arrears status of individual subscribers or, when in the opinion of the managing director, audit conditions warrant such an allowance.

2025 Bylaws & Rules Book – Canada

Business and Farm Publications

Loyalty Point Programs

Definition/Purpose:

The general purpose of loyalty programs is to build brand loyalty and increase sales volume of discretionary goods and services. Loyalty programs are structured so that a specific volume of transactions is required for a customer or a program member to earn sufficient award credits to redeem an award. Each time a customer or program member purchases a product or service, or performs a specific action as a requirement of the loyalty program, he or she earns award credits that, subject to specified thresholds, may be redeemed in the future for awards such as free or deeply discounted products or services.

Qualification Standards:

1. Enrollment

All programs must include an enrollment process that makes a clear link to the host organization; e.g., the organization attempting to build brand loyalty and/or increase sales volumes.

2. Point Activity Requirements

The program participant should be knowledgeable of the specific activity required to earn points – and the volume of points that can be earned with each specific activity. Merely holding the credit card for any length of time ("tenure") does not count as activity and is insufficient for point accrual; rather, points are to be awarded as a result of incremental activity or the value of each transaction.

3. Point Accrual

Participants must be able to accrue points to be used toward future redemption opportunities. In addition, participants should have access to account status on a regular basis.

4. Initial Award of Points

If points are given for enrollment, participants may not initially receive more than 35 percent of the points needed to obtain the least expensive product/service offered in the program.

5. Point Values

Per-point value must be established as follows:

(a) All items offered for redemption of points must include a stated value for all items being offered.

(b) All award point programs must include the option for redemption of points for items other than magazines. The mixture of magazines and nonmagazine items should be one in which at least 20 percent of all products offered for redemption be nonmagazine items. In addition, at least 50 percent of those nonmagazine items must be commercially available (i.e., available in the public domain) for consumer purchase.

(c) The value of each commercially available product included in the program must be equal to or greater than the average value of all magazines included in the offer.

(d) The assigned point value for each program should be based upon the number of points required to redeem the lowest valued commercially available product (product value divided by assigned points equals per-point value).

(e) The number of points required for redemption of all products and services offered (magazine and non-magazine) should be an extension of the per-point value calculation, in section (d) above, times the stated value. This must be applied consistently across all award items (magazine and nonmagazine).

2025 Bylaws & Rules Book – Canada

6. Average Price Impact

The amount to be allocated to the average price calculation formula will be equal to the per-point value times the number of points required to purchase the subscription.

7. Point Expiration

If an expiration date is established, the date must allow for sufficient accumulation of points necessary to redeem the highest value item prior to points expiring.

8. Disclosure

Explanatory paragraphs of all AAM publisher's statements and audit reports must include details of the loyalty point program, particularly the average number of copies included in paid circulation generated from such programs. Disclosure must be made in paragraph 4B of reports reflecting the average circulation served in the period from loyalty point programs with a full explanation in the explanatory paragraph providing program details.