

# Rough Notes

## BRAND REPORT

FOR THE 6 MONTH PERIOD ENDED JUNE 2021



No attempt has been made to rank the information contained in this report in order of importance, since BPA Worldwide believes this is a judgment which must be made by the user of the report.

The Rough Notes Company  
11690 Technology Drive  
Carmel, IN 46032-5600  
Tel. No.: (317) 582-1600  
Fax No.: (317) 816-1001  
www.roughnotes.com

**ROUGH NOTES** magazine is a B2B brand intended for individuals with broad-based interests in insurance industries. The brand content and editorial scope of the publication includes news and industry comment, in-depth technical articles, industry round-up, and special features.

### MAGAZINE CHANNEL FORMAT – PRINT ISSUES

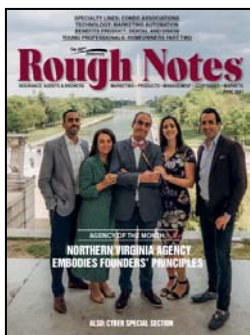
**ROUGH NOTES** is produced in a print format. The editorial for the print copy is the same for all recipients.

### BRAND REPORT PURPOSE

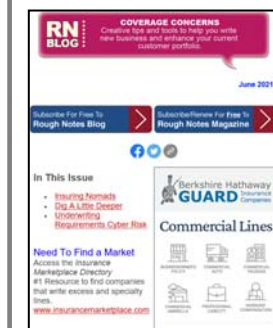
The Brand Report provides a deeper understanding and identification of all audited touch points with customers that have interest in the brand. It is designed to present analysis of all communication channels, including a brand's unique users within each channel of, but not across, multiple media platforms. This non-integrated report contains data for each separate media channel as indicated in the Executive Summary. No attempt has been made to identify or eliminate duplication that may exist across media channels.

## CHANNELS

### ROUGH NOTES PRINT MAGAZINE



### ROUGH NOTES E-NEWSLETTERS



## EXECUTIVE SUMMARY

Below are the average contacts per occurrence, including frequency per period reported.

	Non-Paid	Paid	Average
<b>ROUGH NOTES PRINT MAGAZINE</b> (6 issues in the period)	35,037	36	35,073
(See Paragraph 3b for Source)			
<b>ROUGH NOTES E-NEWSLETTERS</b>			
a. Benefits Lead (6 issued in the period)	48,767	-	48,767
b. Coverage Concerns (6 issued in the period)	49,180	-	49,180
c. Specialty Excess & Surplus Lines (6 issued in the period)	49,033	-	49,033
d. Top Q&A for Agents (6 issued in the period)	49,102	-	49,102

**MAGAZINE CHANNEL FORMAT: This magazine is produced in print format.**

No attempt has been made to identify or eliminate duplication that may exist across media channels

**FIELD SERVED**

**ROUGH NOTES** serves independent property/casualty insurance agencies, life and health insurance agencies, brokerage offices, and insurance companies.

**DEFINITION OF RECIPIENT QUALIFICATION**

Qualified recipients are insurance agents and brokers, life general agents/managers, insurance company personnel, corporate insurance risk managers, buyers of insurance, and others as listed in 3a.

**AVERAGE NON-QUALIFIED CIRCULATION**

Non-Qualified Not Included Elsewhere	Copies
Other Paid Circulation	-
Advertiser and Agency	173
Allocated for Trade Shows and Conventions	-
All Other	491
<b>TOTAL</b>	<b>664</b>

**1. AVERAGE QUALIFIED CIRCULATION BREAKOUT FOR PERIOD**

Qualified Circulation	Total Qualified		Qualified Non-Paid		Qualified Paid	
	Copies	Percent	Copies	Percent	Copies	Percent
Individual	35,073	100.0	35,037	99.9	36	0.1
Sponsored Individually Addressed	-	-	-	-	-	-
Membership Benefit	-	-	-	-	-	-
Multi-Copy Same Addressee	-	-	-	-	-	-
Single Copy Sales	-	-	-	-	-	-
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>35,073</b>	<b>100.0</b>	<b>35,037</b>	<b>99.9</b>	<b>36</b>	<b>0.1</b>

**2. QUALIFIED CIRCULATION BY ISSUES FOR PERIOD**

2021 Issue	Number Removed	Number Added	Total Qualified
January	226	421	35,051
February	154	189	35,086
March	396	387	35,077
April	288	249	35,038
May	2,294	2,391	35,135
June	380	299	35,054
<b>TOTAL</b>	<b>3,738</b>	<b>3,936</b>	

**3a. BUSINESS/OCCUPATION BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF MAY 2021**  
This issue is 0.2% or 74 copies above the average of the other 5 issues reported in Paragraph 2.

	Total Qualified	Percent of Total
<b>Business and Industry</b>		
1. (a) Agents, Brokers & Life General Agents/Managers: Selling Property/Casualty Insurance	27,349	77.9
(b) Selling Life/Health Insurance	918	2.6
(c) Life general agents & managers	453	1.3
<b>Total Copies to Agents, Brokers &amp; Life General Agents/Managers</b>	<b>28,720</b>	<b>81.8</b>
(1) Insurance Company Personnel: Health, Life, & Benefits Home office personnel	506	1.4
(2) Regional & Branch office personnel - Health Life and Benefits	225	0.6
(3) Property/Casualty Insurance Home office personnel	1,178	3.4
(4) Regional & Branch office personnel - Property and Casualty	558	1.6
<b>Total Copies to Insurance Company Personnel</b>	<b>2,467</b>	<b>7.0</b>
(d) Corporate Insurance Risk Managers and Buyers of Insurance: Property/Casualty Insurance	1,516	4.3
(e) Employee Benefit Plans	773	2.2
(f) Both Property/Casualty Insurance and Employee Benefit Plans	732	2.1
<b>Total Copies to Corporate Insurance Risk Managers and Buyers of Insurance</b>	<b>3,021</b>	<b>8.6</b>
2. Life/Health consulting Actuaries; Pension Consultants; Consulting Actuaries; Independent Claim Adjusters; Engineering and Inspections Services; Government Agencies, including Rating Bureaus and States Insurance Departments; Schools; Professional Associations and their related conference attendees; Attorneys; Financial and Banking Officials; Libraries; customers for Rough Notes Companys insurance agency technical reference services, forms and property/casualty insurance licensing courses.	924	2.6
<b>Other Paid Circulation (Optional):</b>		
Subscriptions	3	-
Single Copy Sales	-	-
Did not respond	-	-
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>35,135</b>	<b>100.0</b>

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF MAY 2021**

Qualification Source	Qualified Within			Total Qualified	Percent
	1 year	2 year	3 year		
I. <b>TOTAL</b> - Direct Request:	<b>7,967</b>	<b>4,997</b>	<b>1,920</b>	<b>14,884</b>	<b>42.4</b>
a. Written	2,185	862	48	3,095	8.8
b. Telecommunication	-	-	-	-	-
c. Electronic	5,782	4,135	1,872	11,789	33.6
II. <b>TOTAL</b> - Request from recipient's company:	<b>8,891</b>	-	<b>1</b>	<b>8,892</b>	<b>25.3</b>
a. Written	1	-	1	2	-
b. Telecommunication	-	-	-	-	-
c. Electronic	8,890	-	-	8,890	25.3
III. <b>TOTAL</b> - Membership Benefit:	-	-	-	-	-
a. Individual	-	-	-	-	-
b. Organizational	-	-	-	-	-
IV. <b>TOTAL</b> - Communication (other than request):	<b>66</b>	-	-	<b>66</b>	<b>0.2</b>
a. Written	66	-	-	66	0.2
b. Telecommunication	-	-	-	-	-
c. Electronic	-	-	-	-	-
V. <b>TOTAL</b> - Sources other than above	<b>11,293</b>	-	-	<b>11,293</b>	<b>32.1</b>
Association rosters and directories	-	-	-	-	-
*Business directories	11,120	-	-	11,120	31.6
Manufacturer's, distributor's and wholesaler's lists	-	-	-	-	-
*Other sources	173	-	-	173	0.5
VI. <b>TOTAL</b> - Single Copy Sales:	-	-	-	-	-
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>28,217</b>	<b>4,997</b>	<b>1,921</b>	<b>35,135</b>	<b>100.0</b>
<b>PERCENT</b>	<b>80.3</b>	<b>14.2</b>	<b>5.5</b>	<b>100.0</b>	

\*See Additional Data

**3c. MAILING ADDRESS BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF MAY 2021**

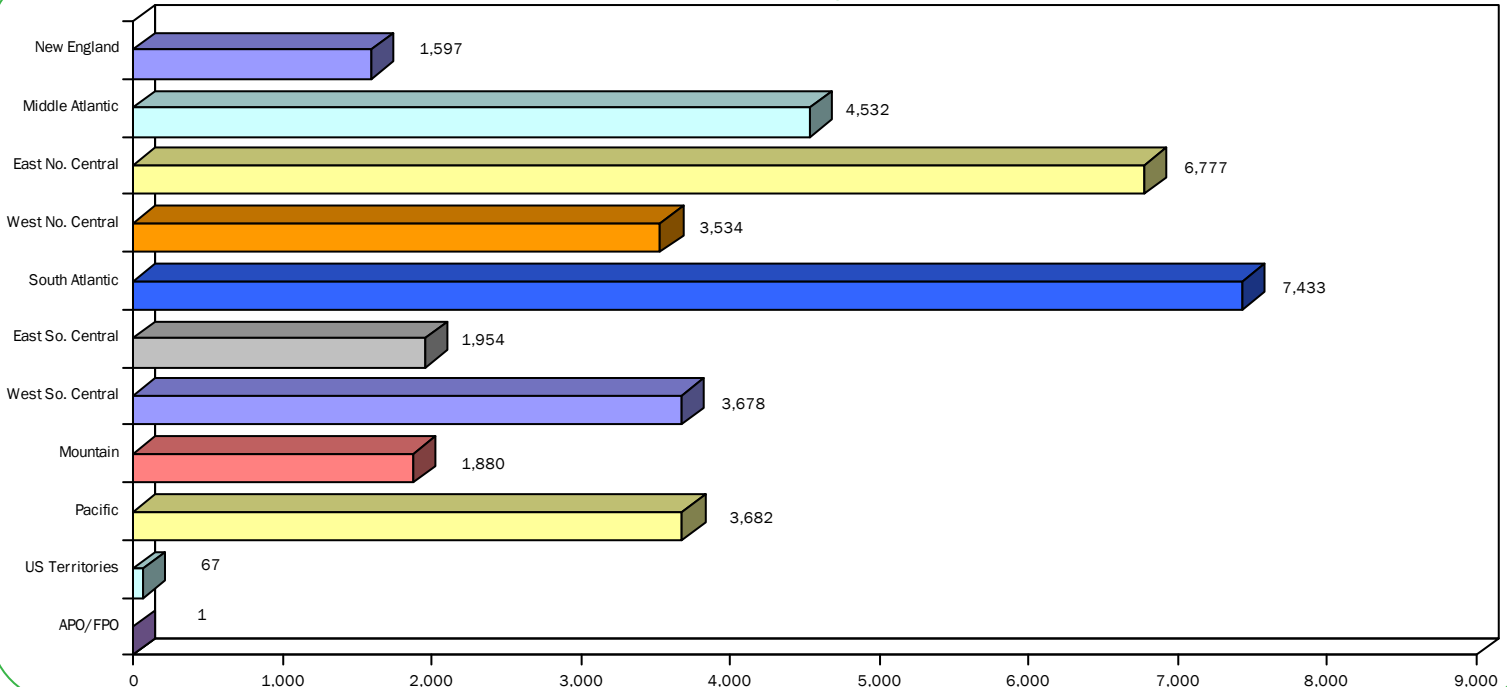
Mailing Address	Total Qualified	Percent
Individuals by name and title and/or function	21,127	60.1
Individuals by name only	11,889	33.9
Titles or functions only	5	-
Company names only	2,114	6.0
Multi-Copy Same Addressee copies	-	-
Single Copy Sales	-	-
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>35,135</b>	<b>100.0</b>

**GEOGRAPHICAL BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF MAY 2021\***

State	Total Qualified	Percent	State	Total Qualified	Percent
Maine	121		Kentucky	500	
New Hampshire	160		Tennessee	874	
Vermont	64		Alabama	344	
Massachusetts	619		Mississippi	236	
Rhode Island	88		<b>EAST SO. CENTRAL</b>	<b>1,954</b>	<b>5.6</b>
Connecticut	545		Arkansas	336	
<b>NEW ENGLAND</b>	<b>1,597</b>	<b>4.5</b>	Louisiana	471	
New York	1,755		Oklahoma	542	
New Jersey	1,340		Texas	2,329	
Pennsylvania	1,437		<b>WEST SO. CENTRAL</b>	<b>3,678</b>	<b>10.5</b>
<b>MIDDLE ATLANTIC</b>	<b>4,532</b>	<b>12.9</b>	Montana	76	
Ohio	1,306		Idaho	111	
Indiana	1,017		Wyoming	47	
Illinois	1,920		Colorado	414	
Michigan	1,096		New Mexico	123	
Wisconsin	1,438		Arizona	621	
<b>EAST NO. CENTRAL</b>	<b>6,777</b>	<b>19.3</b>	Utah	224	
Minnesota	788		Nevada	264	
Iowa	978		<b>MOUNTAIN</b>	<b>1,880</b>	<b>5.3</b>
Missouri	790		Alaska	44	
North Dakota	86		Washington	426	
South Dakota	95		Oregon	445	
Nebraska	445		California	2,707	
Kansas	352		Hawaii	60	
<b>WEST NO. CENTRAL</b>	<b>3,534</b>	<b>10.1</b>	<b>PACIFIC</b>	<b>3,682</b>	<b>10.5</b>
Delaware	74		<b>UNITED STATES</b>	<b>35,067</b>	<b>99.8</b>
Maryland	676		U.S. Territories	67	
Washington, DC	30		Canada	-	
Virginia	677		Mexico	-	
West Virginia	168		Other International	-	
North Carolina	1,076		APO/FPO	1	
South Carolina	726				
Georgia	1,278				
Florida	2,728				
<b>SOUTH ATLANTIC</b>	<b>7,433</b>	<b>21.1</b>			
			<b>TOTAL QUALIFIED CIRCULATION</b>	<b>35,135</b>	<b>100.0</b>

\*See Additional Data

**GEOGRAPHICAL BREAKOUT OF QUALIFIED CIRCULATION**



# E-NEWSLETTER CHANNEL

2021	Benefits Lead	Coverage Concerns	Specialty Excess & Surplus Lines	Top Q&A for Agents
<b>JANUARY</b>				
January 7	-	-	47,655	-
January 14	49,783	-	-	-
January 21	-	49,980	-	-
January 28	-	-	-	49,905
<b>FEBRUARY</b>				
February 5	-	-	49,884	-
February 11	49,413	-	-	-
February 18	-	49,611	-	-
February 25	-	-	-	49,523
<b>MARCH</b>				
March 5	-	-	49,588	-
March 11	49,096	-	-	-
March 19	-	49,328	-	-
March 25	-	-	-	49,201
<b>APRIL</b>				
April 8	-	-	49,289	-
April 15	48,483	-	-	-
April 22	-	49,022	-	-
April 29	-	-	-	48,916
<b>MAY</b>				
May 6	-	-	49,030	-
May 13	48,081	-	-	-
May 20	-	48,747	-	-
May 27	-	-	-	48,660
<b>JUNE</b>				
June 11	47,745	-	48,750	-
June 17	-	48,393	-	-
June 24	-	-	-	48,404
<b>AVERAGE:</b>	<b>48,767</b>	<b>49,180</b>	<b>49,033</b>	<b>49,102</b>

Benefits Lead (6 issued in the period)  
 Coverage Concerns (6 issued in the period)  
 Specialty Excess & Surplus Lines (6 issued in the period)  
 Top Q&A for Agents (6 issued in the period)

## ADDITIONAL DATA

### MAGAZINE: PARAGRAPH 3b:

Business directories include 1 source of circulation for a quantity of 11,120 copies or 31.6%, including Discovery Data.  
 Other sources include 1 source of circulation for a quantity of 173 copies or 0.5%.

### GEOGRAPHIC DISTRIBUTION:

Geographic data for E-Newsletters is not reported at the media owner's option.

### PUBLISHER'S AFFIDAVIT

We hereby make oath and say that all data set forth in this statement are true.

Walter Gdowski, Owner  
 David Willis, Editor-In-Chief

(At least one of the above signatures must be that of an officer of the publishing company or its authorized representative.)

#### IMPORTANT NOTE:

This unaudited brand report has been checked against the previous audit report.  
 It will be included in the annual audit made by BPA Worldwide.

Date signed	July 1, 2021
State	Indiana
County	Hamilton
Received by BPA Worldwide	July 1, 2021
Type	BD
ID Number	R055B0J1

#### About BPA Worldwide

A not-for-profit organization since 1931 and headquartered in Shelton, Connecticut, USA, BPA has a global membership, spanning more than 20 countries. The organization conducts 2,500+ audits for media brands in print, online/digital and live events. In addition, the BPA-iCompli division verifies compliance to defined industry standards, provides technology assurance, and certifies organization's sustainability practices and reporting. BPA is supported by 4,000+ advertiser and agency members. The latest innovation to move the industry forward is the BPA Media Exchange, a brand-safe and audited cooperative marketplace which offers automated solutions for the buying and selling of digital advertising.