Tuesday 31^t March, 2020

The Hon. Scott Morrison MP
Prime Minister of Australia
Parliament House
Canberra ACT 2600

Cc'd:

RE: COVID-19 – Essential Service and Essential Service Supply Chain Provider – Print, Publishing, Mail and Distribution

Dear Prime Minister,

I write in an era of unprecedented times confronting not only the essence of Australian communities, but further, a critical period for all Australians, businesses and broader economy.

The Real Media Collective (the Collective) is an industry association representing the paper, print, publishing, mail and distribution sectors across Australia and New Zealand. Across the Australian Board and Member companies of the organisation, we represent $15.88BN of the $18.9BN industry.

The industry sectors we represent employ over 258,000 Australians engaged in full-time, part-time and independent contractor arrangements with mixed skilled and unskilled labour supply across metropolitan and regional locations.

Our Industry is highly fragmented with 5,817 businesses operating across the country. The four largest companies reflect some 40% of industry's total revenue and with the majority of firms employing less than 20 people. This equates to 95% of our businesses categorised as 'small business', operating under $2.0 million turnover per annum (Ibisworld, 2019).

We recognise and value the steps the Australian Federal and State Governments are implementing to stay ahead of the curve and as a collective industry we have unilaterally implemented strong safety measures to protect our employees and we continue to adapt in line with Government Health guidelines. We have developed protocols as follows;

> remote offices established to assist people to work from home,
> rotation of manufacturing shifts to minimise interaction of staff,
> increased ventilation of work areas,

> safety equipment, sanitisers and social distancing practices.

The Collective, membership and broader industries we represent, all provide critical services to the community – News, media and information services, printed Medical label and packaging, Government notices and communications, Magazine publications providing in-home media and community notices, Signage to advise public health and other notices to the public, Food label and packaging, Transactional mail and postal services, Finance and insurance notices and more.

Our industry is the largest manufacturing employer in the country providing often unseen products and services to ensure our country operates efficiently. For instance, communications to Australians in providing physical and mental health support, those experiencing unwellness, loneliness, anxieties or concerns during this difficult period, are accessed via our member constituents.

We therefore provide this correspondence and the attached materials by way of pre-emptive information for you when considering benefits, support any possible future restrictions of industry over the coming weeks. The paper, print, publishing, mail and distribution sector must be listed as an essential service (in the instance of publishing, community newspapers, mail-order, directory) and thereby, in extension, an essential service supply chain provider (print, packaging, labelling) in an essential services framework for not only the livelihood of many Australians but also to keep the public informed with accurate and trusted information throughout a critical period.

Further, the industry offers Government an outline of the initiatives we are tabling to support Government, other Industries and the Australian community including;

> an offering to Government to reach 24.4M Australians via a letterbox flyer outlining COVID-19 safety messages and counselling service lines being produced and distributed to every Australian home,
> national advertisement campaign, linked to the letterbox and consumer magazines reaching 6.3M magazine subscribers and 15.6M Australians that will support other media channel campaigning,
> we will commit to working with Government, as an essential service media and communication channel as well as an essential services supply chain provider, to ensure all Australians can receive critical messages for their health and safety during this time.

We make ourselves available for any further discussions and/or additional information requests.

Yours faithfully,

Kellie Northwood
Chief Executive Officer
The Real Media Collective

KEY TAKE-OUTS

> The paper, print, publishing, mail and distribution sectors employ 258,999 Australians across 17,756 businesses. An industry value of $18.9BN AUD across metropolitan and regional, skilled, unskilled and contractor arrangements. We are the largest manufacturing employer industry in the country and to protect jobs, we need to remain open.

> Over 2.5M Australians do not have internet connectivity in their homes (ABS, 2018) and more than four million Australians access the internet solely through a mobile connection. In 2019, mobile-only users have an Australian Digital Index Inclusion (ADII) score of 43.7, **some 18.2 points lower than the national average** (61.9) (ADII, 2019).

> People aged 65+ are Australia's least digitally included age group. The ADII score for this age is **19.5 points lower** than the most digitally included age group (people aged 25-34 years) (ADII, 2019).

> Those on a disability pension and living with a disability are **9.9 points lower** than the national average (ADII, 2019).

> Australians with low levels of income, education, and employment are significantly less digitally included. Australians in Q5 low-income households have a **30.5 points lower** score than those in Q1 high-income households (ADII, 2019).

> Indigenous Australians living in urban and regional areas have low digital inclusion (55.1, or **6.8 points lower** than the national average) (ADII, 2019).

> There are substantial differences between Australians living in rural and urban areas with digital inclusion being 8.1 points higher in capital cities (63.8) than in country areas (55.7) (ADII, 2019).

> ACCC Scamwatch January 2020 figures report Mail/Letterbox fraud costing Australians $108,683 compared to a staggering $4,284,669 across Digital channels – in a period of fear and misleading messages being communicated to Australians the Letterbox is a channel of strength and trust (ACCC, 2020).

> We are a highly sought-after media channel and reach more Australians than any other - Letterbox - addressed and unaddressed reaches 24.4M Australians daily. Magazines delivered direct to Subscribers reach 6.3M Australians and that's before secondary reading and sharing in the home (TRMC, 2020). Aus.gov.au/whatsapp, whilst a good digital initiative, only has 482,000 Australian registrations at the time of writing this piece (ABC, 2020).

> Established media channels have stronger readership, higher trust (in a time where well-sourced and credible information is paramount) and wider reach than other digital channels.

GOVERNMENT BRIEFING

SUPPLEMENTARY INFORMATION

The Real Media Collective

representing paper, print, publishing, mail and distribution industry sectors.

Submission to Commonwealth and National Cabinet assessing COVID-19 (coronavirus) pandemic.

Compilation date: 31st March 2020

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1.0 About the Organisation

The Real Media Collective (Collective)

The Collective provides thought leadership, education and protection of the effectiveness, relevance, versatility, power and sustainability of consumer marketing, media and the letterbox advertising channel. All activities and communications are delivered in a considered, researched, balanced and verifiable manner offering a sophisticated industry voice across producers, distributors, buyers and end-users.

The Collective was formed in 2018 under a merger of the Australasian Catalogue Association (formed in 1991) and TSA Limited (formed in 2009) as well as a Secretariat partnership with the Australasian Paper Industry Association (formed in 2010).

Pertinent to this submission is our representation of the paper, print, publishing, mail, graphic packaging and distribution industry sectors. This includes the two largest print media companies in Australia, IVE Group and Ovato Limited and the largest publisher, Bauer Media Group.

The Collective, including APIA, has 324 Member company premises. Our members operate nationally across all States and Territories. Our member company's size by turnover ranges from $250,000 to $100 million+ turnover.

Across the Board and Member companies of the organisation, we represent $15.88BN of the $18.9BN industry. Collectively the industry, incorporating paper, ink, print, publishing, mail and distribution employs over 258,000 Australians engaged in full-time, part-time and independent contractor arrangements with mixed skilled and unskilled labour supply across metropolitan and regional locations.

We work within a collaborative and like-minded industry landscape with other industry associations including, but not limited to:

Australasian Paper Industry Association (APIA)

The Australasian Paper Industry Association Ltd (APIA) is the industry association representing the interests of the Australasian Paper Industry. The membership includes paper manufacturers, paper importers (including mill agents) and paper merchants/distributors.

In 2018, APIA determined a stronger partnership with the broader industry would provide a wider vision and unified position on matters before Government and other Stakeholders to advance and strengthen the paper and print industry collectively. To that end, APIA holds a Secretariat partnership with 'The Real Media Collective'.

Association for Data-Driven Marketing & Advertising (ADMA)

The Association for Data-driven Marketing & Advertising (ADMA) is the principal industry body for data-driven marketing and advertising. ADMA is also the ultimate authority and go-to resource for effective and creative data-driven marketing across all channels and platforms, providing insight, ideas and innovation for today's marketing industry.

The largest marketing and advertising association in Australia, ADMA has over 600 corporate members including major financial institutions, telecommunications companies, energy providers, leading media companies, travel service companies, airlines, major charities, statutory corporations, educational institutions and specialist suppliers to the industry including advertising agencies, software and internet companies.

Australian Forest Products Association (AUSFPA / AFPA)

The Australian Forest Products Association is the peak national industry body representing the resources, processing, pulp, paper and bioproduct industries covering the forest products value chain.

AFPA's membership falls under four chambers (Growers, Hardwood Processing, Softwood Manufacturing, Pulp, Paper and Bioproducts) representing the core business of organisations at different points in the value chain.

Fundraising Institute of Australia (FIA)

The Fundraising Institute Australia (FIA) is the national peak body representing professional fundraising in Australia. Its network of more than 200 volunteers across Australia helps them service their members through their expertise, advice and oversight.

FIA champions and facilitates best practice, with its code for ethical fundraising and achieves this through professional development, networking and advocacy for all its members.

Visual Connections

Visual Connections is the premier association for the suppliers of hardware, software, consumables and ancillary services for the print, graphics and signage industries in Australia. It supports its members and promotes a sustainable and successful future for the industry through education, exhibitions, sponsorship, grants and networking opportunities, and have the largest trade show portfolio in the industry with PrintEx, PacPrint, Visual Impact and Label+ Packaging Expos under its banner.

Why do we work together?

The Associations by the nature of their commonality and commitment to achieve growth across the graphic communications industry, from supply to design to production to delivery, have alignment in projects and vision for our Industry. Further, with common executive management via a shared paid Executive, Management team, Board and Member synergies, working together, assists in a united approach and a commitment to respond to the industry's requirements to protect and promote.

2.0 Industry Snapshot

AUSTRALIAN PAPER, PRINT PUBLISHING & LETTERBOX INDUSTRY
SNAPSHOT

KEY FIGURES

ANNUAL TURNOVER:
$18.9BN (AUD)

EMPLOYEES:
258,999

NO. OF BUSINESSES:
17,756

INDUSTRY REPRESENTATION:
The industries represented above include paper, print, publishing, mail and distribution, all represented under The Real Media Collective in partnership with Australasian Paper Industry Association and the Australian Forest Products Association. The Real Media Collective membership represents $15.88BN of the $18.9BN industry.

INDUSTRY OUTPUTS INCLUDE:
Books, Magazines, Home Delivery Packaging, Government (Federal, State, Local) Notices and Communications, Medical Packaging and Labelling, Food Packaging and Labelling, Community Notices, Signage, Catalogues, Envelopes, Finance and Insurance Essential Notices, Transactional mail and more.

RELATED INDUSTRIES INCLUDE:
Marketing, Design, ATL Media, Communications, Newspapers and more.

EMPLOYMENT BREAKDOWN BY SECTOR

60,820 of which **18,000** are direct employees.

38,761 DESIGN (30%) + PRINT

4,287 PUBLISHING

155,131 POSTAL SERVICES, MAIL PROCESSING & LETTERBOX DISTRIBUTION

258,999 TOTAL AUSTRALIANS EMPLOYED

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3.0 Publishing – Magazine, Community Newspapers and Community Directories

INTRODUCTION

The Magazine and Directory sector across Australia contributes $1.0BN to the economy across 858 businesses. Of the $1.0BN industry, Women's magazines represent 29.4%, 28.7% represent Other publications and included in this sector are Community Directories which represent 36.9% (Ibisworld, 2019).

The two largest publishers in Australia of consumer magazines is Bauer Media Group (BMG), of whom the Chief Executive Officer, Mr Brendon Hill, sits on the Collective Board, and Pacific Media Network (Pacific).

Magazines are a critical media channel for social connectivity, mental wellness and community information.

Magazine publications, delivered under Subscription, Supermarket or Newsagency channels, provide an essential social and mental relief to all as a media channel. They offer news and entertainment connectivity in times of extended isolation.

Community Newspapers provide critical free in-home local information reaching members of the community other channels cannot.

Community Newspapers, delivered to the letterbox, provide critical community information, without charge, directly to households. Community Newspapers inform communities of local alerts and initiatives specific to the local area across metropolitan and regional locations.

Community Directories is an important media channel providing communications to metropolitan and regional communities across Australia.

Information included within each Community Directory is pertinent to the local area and provides Australians access to Emergency Medical & Hospital, Utility, Police, Fire, Counselling Services, Addiction Support, Mental Health services, Government Office and Department, Small business access, Community Co-Operative Services, Religious facilities and other essential services contact points.

KEY PONTS FOR CONSIDERATION

The Publishing channel should be deemed an essential media, communications and information service due to the following considerations:

> Australians, including our most vulnerable elderly, disabled, in-home carer, poor or digitally excluded citizens can maintain access to ensure social connectivity with magazines and community newspapers. Refer 6.0 Digital Divide.

> Over 6.3M Australians subscribe to consumer magazines across the country, receiving paid for content weekly and monthly. A strong reach and readership for communication.

> Magazines and newspapers are the most trusted media channels with legally bound fact checking legislation ensuring content is accurate compared to often misleading social media outlets (ABC, 2020). The need for fact-checked and well-sourced media has never been greater and both Magazine and newspapers provide this over digital channels.

> Magazines and Community newspapers provide an opportunity for Australians in isolation to engage in a meaningful, trusted and relevant manner with a media channel that delivers content, community information and entertainment conducive to a positive mental health outlook during an alienating and frightening period.

Advice for mental health wellness during this difficult period from the WHO:

"Minimize watching, reading or listening to news about COVID-19 that causes you to feel anxious or distressed; seek information only from trusted sources and mainly so that you can take practical steps to prepare your plans and protect yourself and loved ones." World Health Organisation, Mental health and psychosocial considerations during the COVID-19 outbreak, 2020.

It is paramount, in a time of great fear and isolation, that as much normalcy of social connectivity is afforded to citizens. Furthermore, to provide content that offers an escapism from the crisis we are experiencing. Receiving and reading their magazines and/or community newspapers is part of a routine media engagement for millions of Australians with content of a stronger well-being focus than daily news or current affairs.

> Publishers also play an important community role in socialising campaigns and initiatives across the community which could be deemed critical for the COVID-19 pandemic.

BMG, over the most recent period, have built two essential campaigns that demonstrate the role of publishing in community service:

   o <u>'Greater Financial Literacy for women'</u> - a campaign which has achieved over 1 million consumer actions, driving greater financial literacy amongst women, and
   o <u>'Rebuild our Towns'</u> - an effort to support regional and small town businesses get back on their feet from the bushfires.

> Publishers such as BMG and Pacific have a strong female readership with a national presence. A critical communication channel across our most vulnerable gender group across domestic violence (AIC, 2015), financial literacy and security (only 35% of women are financially literate (HILDA, 2019)), regional isolation and more gender gap issues. Ensuring female media channels remain open to communicate well-being, health and mental wellness content is critical.

> Australians, of all ages, read and are connected to magazines, a media channel they pay to access, which means they are more engaged than with other channels. Over 15.6 million Australians read magazines in print or online, of this 13.1 million Australians aged 14+ read print magazines (Roy Morgan, 2020).

> Australian citizens in isolation must be able to remain socially connected through physical channels, such as magazines, as a media and entertainment channel that is not digital.

Beyond Blue encourages digital unplugging for mental wellness:

"Technology is incredible and the benefits are huge in so many aspects of everyday life. However, being able to unplug and have some time away from the screen will leave you re-energised and more in touch with the world around you. Here's a quote to inspire you from author Anne Lammott: "Almost everything will work again if you unplug it for a few minutes, including you," Beyond Blue, 2020.

Furthermore, 85% of Magazine readers, agree that Magazines help them to 'escape from their day'. Magazine readers agree that Magazines help them to 'keep up to date' (89%) and gives them 'advice they can trust' (83%) (Bauer, 2019).

> Economic stability of the industry is also critical when considering the sector that employs 258,000 Australians. It is not only the immediate economic impact that needs consideration during a lockdown period, but further, the long-term economic impact of non-recovery. An industry already experiencing significant challenges can ill-afford reduction in print volumes or readership.

"There's a rule of thumb, if you change your behaviour in any way for more than six weeks it becomes engrained and I think if this lockdown certainly goes on for 2-3 months then obviously there is a big concern that those people that haven't got access or able to buy newspaper will get out of the habit, for sure…and that's a very big concern that everybody has. Every publisher has."

WAN IFA, Dr Rick Stunt, Group Paper Director
Dmg-Media, London

Periods of time without access to a communications channel can significantly impact consumer habits that can lead to a collapse or create an impossibility for recovery. Whilst time-frames are mentioned by Dr Stunt, this has not been assessed scientifically and it is our position that two (2) to four (4) weeks will be significant enough to collapse employment for over 258,000 Australians in the future.

> Community Directories are a valued and integral resource for the most vulnerable citizens – people aged 50+, those experiencing digital division across access or skillset abilities, those experiencing hardship or isolation from community services.

4.0 Letterbox

INTRODUCTION

Every home has a Letterbox and this media channel reaches more Australians than any other at 23.8M Australians daily (TRMC, PORTA[TM], 2020). A channel that holds daily readership and strong trust credentials.

The industry value has two main producers of Letterbox media – IVE Group and Ovato of whom both Chief Executive Officers, Mr Matt Aitken (Chairman) and Kevin Slaven (Deputy Chair), respectfully, sit on the Collective Board.

Both organisations are the highest employers across the sector operating both creative, production and distribution services to the channel.

Local area content for the Letterbox is supported by commercial print and distribution networks.

The sector represents ~$1.8BN across Australia with labour supply in metropolitan and regional Australia across skilled, unskilled and independent contractor arrangements.

The Letterbox channel is critical to reach Australians with messages from advertising to information – all ages, equally.

Often the humble 'catalogue' is seen as the 'poor-man's cousin' in the media world, however its effectiveness and strong readership is often under-represented. It is a media channel that reaches all Australians across all socio-economic, regional and educational demographic cohorts.

Catalogues, once a channel that communicated sales and price points only, is now one that deliver's magazine-style content free of charge to budget-conscious families from Supermarkets, well-being updates across Pharmacy, educational material across Government and Education and more across each specific retail market segment.

KEY POINTS FOR CONSIDERATION
> The Letterbox channel is highly read - 64% of Australians have read material from their Letterbox (unaddressed) in the last four weeks (Roy Morgan, 2019) with 81% of Australians opening and reading mail immediately (Accenture, 2020). The Letterbox channel is a strong communicator.

> Australians seek information from their Letterbox and view this channel as helpful (58%), useful (41%) and part of relaxation routines (22%) (Roy Morgan, 2019).

> Australians keep Letterbox material in the home for extended periods of time and future reference, sharing content with friends and family through various forms of communication and taking action from reading the content.

   Action with Letterbox - unaddressed
   Of all Australian Catalogue Readers 14+
   o 80.2% have told a friend/family member about what they saw,

o   42.4% have emailed/texted a picture from a catalogue to their friend/family member,

o   35.9% have given their catalogue to a friend/family member/neighbour.

75.7% of all Australian Catalogue Readers 14+ have kept a catalogue for future reference

o   Of those who have kept a catalogue, 36.8% generally keep their catalogues for less than a week and 45.1% keep their catalogues for 1-2 weeks. 16.8% keep them for longer than 2 weeks.

(ibid, 2019).

>   Australians pay attention to what's in their Letterbox – unaddressed more than any other media channel.

o   76.3% pay a lot or some attention while reading Catalogues, Flyers, Leaflets.
o   70.1% pay a lot or some attention while watching TV.
o   58.9% pay a lot or some attention while listening to the radio.
o   57.2% pay a lot or some attention while reading Newspapers.
o   50.6% pay a lot or some attention while reading Magazines.

(ibid, 2019).

>   On average, people who read Letterbox - Unaddressed spend seven (7) minutes reading catalogues (ibid, 2019).

>   ACCC Scamwatch January 2020 figures report Mail/Letterbox fraud costing Australians $108,683 compared to a staggering $4,284,669 across Digital channels – in a period of fear and misleading messages being communicated to Australians the Letterbox is a channel of strength and trust.
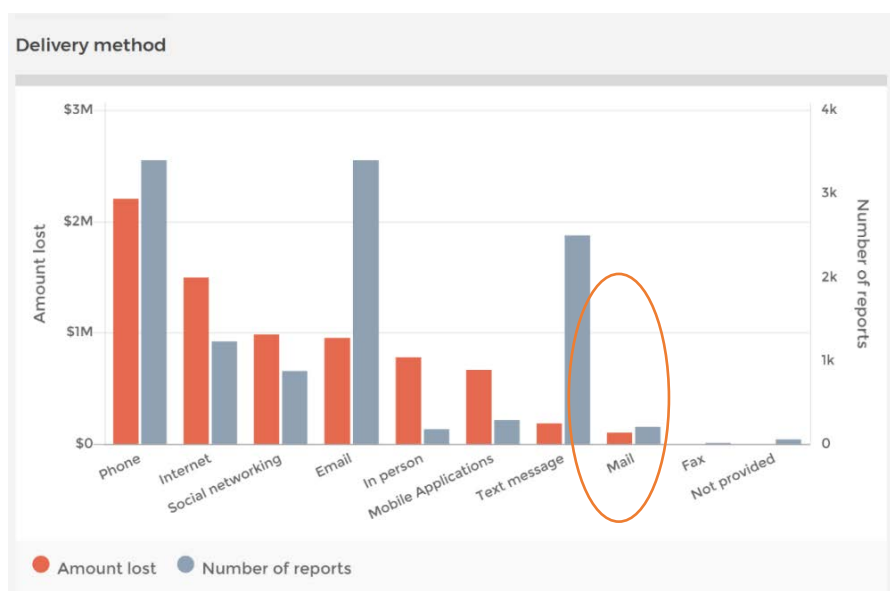
Source: Scamwatch, 2020

> **Retail Direct-Marketing Catalogues**, such as *EziBuy*, *Innovations* and others, have the opportunity to engage the most isolated and fragile citizens, our elderly, with additional content, retail access for needed clothing, in-home care, community service advice, pharmaceutical products and more.

Specific opportunity is available for those unable to attend a Supermarket or Pharmacy or other online retail services for their immediate needs.

Online retail services, are restrictive due to the digital literacy, affordability and accessibility for the elderly demographic or those without access to the internet within their home, thereby creating additional stress and alienation to a vulnerable section of our community. Established print and letterbox channels provide alternative solutions for these most isolated citizens.

INSIGHT: *INNOVATIONS*
Innovations is a direct marketing catalogue retailer that sells a broad range of products to its two (2) million customers across Australia. From household products, clothing essentials, craft supplies, entertainment DVDs and pet food and supplies, *Innovations* services many needs of its customer base. With over thirty (30) years of experience in suppling essentials to the 50+ demographic, and a focus on its core market of over 65-year olds, *Innovations* is a highly trusted business by its customers.

Overview of the *Innovations* database
80% Female,
87% aged 55 years or older,
60% aged over 65 years or older,
55% have a household income of less than $40,000, and
58% Rural / 42% Metro database.
(Innovations, 2020)

The Letterbox – unaddressed channel provides opportunity for Government – Federal, State and Local, Brands and Retailers and other Community Service providers to communicate with Australians directly to their home with content that is received in a relaxed and useful way.

The channel employs ~22,000 Australians across varying levels from full-time, part-time and contractor arrangements, skilled, unskilled and mixed geographies.

5.0 Commercial Print / Packaging / Labelling

INTRODUCTION

The Commercial print and graphic packaging and labelling (Commercial print) sector is a $7.6BN sector with 4,959 businesses across Australia. Most businesses in this sector employ less than twenty (20) people and 95% are categorised as 'small businesses' operating under $2.0 million turnover per annum (Ibisworld, 2019).

Despite profit margin decline across the manufacturing sector, the industry has maintained employment levels and utilised technological advancements, reviews on energy consumption, waste material recycling initiatives, channel promotion to advertisers and more to stabilise volumes and turnover.
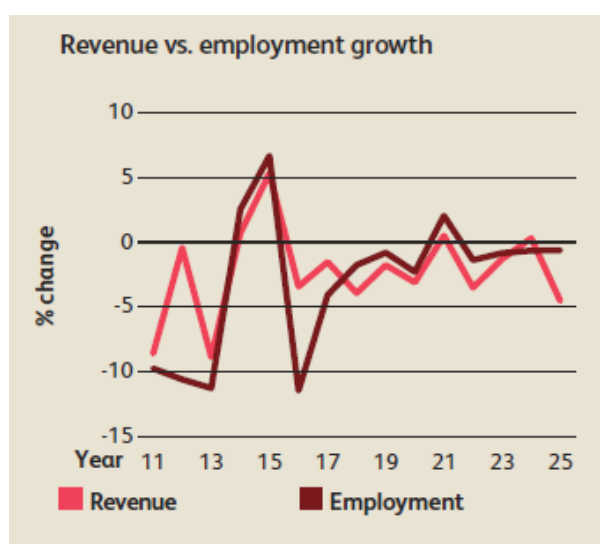
Source: Ibisworld, 2019.

Commercial print is a critical supply-chain provider to ensure essential services can be carried out throughout a crisis.

Commercial print is the largest manufacturing employment industry in Australia employing 258,999 Australians.

KEY POINTS FOR CONSIDERATION

> Commercial print providers produce:

> o Medical and Health instruction guides, labels and packaging,

> o Government notices and communications,

> o Magazine publications providing in-home media and community notices,

> o Community Newspapers and Magazines,

> o Transactional mail and postal services,

- Food label and packaging,

- Finance and Insurance advice,

- Signage notices across outdoor – Highways, Beach Closure notices or indoor – social distancing floor decals (labels), Hospital hazardous signage and more.

Commercial printing delivers critical information for all Australians in everyday lives, and especially in a period of confusion, uncertainty and new behavioural conditions that we are experiencing throughout this period.

> Commercial print provides critical communications for already identified essential service retailers including, but not limited to; Supermarkets, Pharmacies, Newsagents, Banks, Australia Post and more.

> Paper substrates are a low-risk carrier of COVID-19 and with the mechanical processing of print and mail services across more than 24 hours (the virus incubation period on cardboard surfaces), the product is a safe channel. Refer 7.0 Industry Initiatives.

> Prime Minister Scott Morrison referenced in his address to the nation on Sunday 29th March, Australians are buying sports equipment, gym-mats, his own family buying puzzles and more. The commercial print sector provides the opportunity for businesses selling those items to continue operation despite difficult economic times.

> Packaging and labels across essential service products including but are not limited to; health and Medical, Food, Pharmacy, Hygiene and Sanitary. Packaging and labels are often the first touch-point with customers and provide a valuable communication vehicle especially in advice concerning safety instructions and appropriate product consumption or usage.

6.0 Digital Divide

Over 2.5M Australians do not have internet connectivity in their homes (ABS, 2018) and more than four (4) million Australians access the internet solely through a mobile connection. In 2019, mobile-only users have an ADII score of 43.7, some 18.2 points lower than the national average (61.9) (ADII, 2019).

Being mobile-only not only diminishes Access, but also impacts on the Affordability and Digital Ability aspects of digital inclusion. Mobile-only use is linked with socio-economic factors, with people in the lowest household income quintile (30.7%), those with low levels of education (28.0%), and the unemployed (25.3%) more likely to be mobile-only (ibid., 2019).

Australia does have a digital divide with those most impacted being our most vulnerable – the elderly, disabled, indigenous communities, mentally ill, those living in a low-income household or dependent on a parenting or carer payment, an age pension, disability support pension or a Newstart allowance. Furthermore, geographically our regional locations are hardest hit.

People aged 65+ are Australia's least digitally included age group. The ADII score for this age group is 48.0, some **19.5 points lower** than the most digitally included age group (people aged 25-34 years).

Those on a disability pension and living with a disability have an ADII score of 52.0, **9.9 points lower** than the national average.

Australians with low levels of income, education, and employment are significantly less digitally included. Australians in Q5 low-income households have a digital inclusion score of 43.3, which is **30.5 points lower** than those in Q1 high-income households (73.8). Although this gap has narrowed by 0.4 points since 2018, it remains at the same level as recorded in 2014 (30.5).

Indigenous Australians living in urban and regional areas have low digital inclusion (55.1, or **6.8 points lower** than the national average).

There are substantial differences between Australians living in rural and urban areas with digital inclusion being 8.1 points higher in capital cities (63.8) than in country areas (55.7).

(ibid., 2019).

Restricting this highest digitally divided sector of the community to additional isolation from limited information access needs to be challenged to ensure all citizens are afforded access to basic levels of communication, community notices as well as media, retail and entertainment services.

The very health concerns we seek to implement to protect these citizens through isolation may well see the people most impacted by mental and physical health deterioration without access to established media channels – magazines, letterbox and commercial print.

The sectors the Collective represents reaches these most vulnerable citizens with trusted, credible and well-sourced information.

7.0 Industry Initiatives

7.1 PRINTING AND DISTRIBUTION/DELIVERER PROTOCOLS

The Collective has developed protocols for printing and distribution to provide industry commitment and compliance and ensure a responsible and united industry position to protect workers and the wider Australian community.

PRINTING
The following procedures are standards that are to be implemented across all commercial print operations as an essential service supply chain provider during COVID-19 isolation and lockdown periods as the best safety standards across the sector:

1. Staff that are unwell will not attend work.
2. Staff who are isolating with vulnerable people will not be able to attend work.
3. Staff who are isolating with people that have recently returned from overseas will not be able to attend work.
4. Staff will be encouraged not to carpool to work.
5. Staff numbers reduced to minimum levels to ensure two (2) metre distancing can be maintained at all times. This will be monitored.
6. All staff are required to sign in each day manually with a manager or swipe their own card or other touchless sign-in technologies to avoid the use of time clocks.
7. Staff will need to declare fitness for work.
8. The majority of shifts are split with no overlap, where safe to do so.
9. Shift numbers are maintained at a minimum and to maintain workplace safety.
10. Break times will be staggered so that distancing is maintained and there is no over-lap between crews.
11. All non-operational staff will work from home
12. No visitors are permitted to the premises.
13. All essential deliveries/distribution have been advised of the process for making contactless deliveries/pick-ups.
14. Company cleaning will continue at an increased level using hospital grade products.
15. Hygiene products including soap/water, hand sanitiser, wipes, gloves and masks are available to all staff on site and they have been instructed in their correct use.
16. Staff have been made aware of the Ministry of Health requirements for Personal Protective Equipment.
17. COVID-19 hygiene posters are located in all work areas.
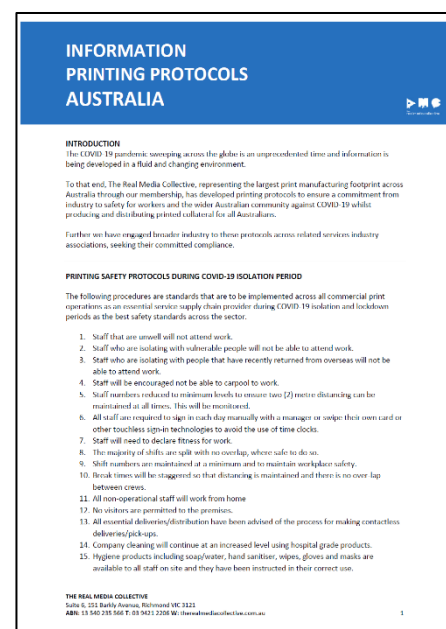
18. Staff will be updated on a regular basis on any changes to requirements.

19. Businesses may implement safety routines in addition to those highlighted to further protect their staff.

DISTRIBUTION

1. Deliverer to isolate/treat as per Government Health guidelines.

2. Deliverers who are isolating with vulnerable people will not be able to perform contract.

3. Deliverers who are isolating with people that have recently returned from overseas will not be able to perform contract.

4. Deliverer to cease all distribution if any coronavirus symptoms outlined under Government Health guidelines perpetuate and seek immediate medical advice.

5. Should a Deliverer become symptomatic or confirmed as coronavirus positive, Deliverers should identify if there is any possible cross infection and fully comply with Health Department guidelines.

6. Deliverers are to reduce any interaction with households to minimum levels to ensure two (2) metre distancing can be maintained at all times.

7. Deliverers are encouraged to deliver in isolation or with family household members only.

8. If a Deliverer becomes symptomatic and has a back-up person (who is not infected), back-up person may take over the operation. Network/Area resource to support where required.

9. Deliverers are to abide by Government Health guidelines;

    a. Wash hands regularly, for 20 seconds,
    b. Avoid touching your eyes and mouth,
    c. Cover your nose and/or mouth when coughing or sneezing,
    d. Use only disposable tissues, and dispose of them immediately after use,
    e. Avoid close contact with anyone showing respiratory symptoms,
    f. Stay at home when you are sick.

10. If there is no back-up Deliverer in place – Network/Area support to fill the role of Deliverer contract.

11. Where feasible (metro areas), infected Deliverer volume re-directed to neighboring Distributor shed for collection by revised Deliverer/s after twenty-four (24) hours in holding for possible COVID-19 surface stability risk.

12. Deliverer to seek medical clearance prior to return.
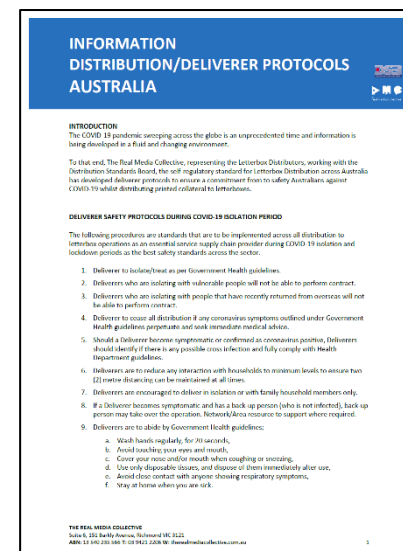
In addition to the commitment from our Collective members, representing the largest print manufacturing footprint across Australia, we have written to related services industry associations seeking a common commitment across their members. The organisations include;

> Publishing – Magazine Networks

> Letterbox / Distribution – Australia Post and Distribution Standards Board

> Commercial Print / Packaging / Labelling – Printing and Visual Communications Association, Australian Packaging Covenant Organisation and Visual Connections.

7.2 COMMUNICATE TO ALL AUSTRALIANS COVID-19 SAFETY GOVERNMENT MESSAGE

The Collective membership includes the largest print groups, 100% of letterbox distributors – Australia Post, IVE Group and Ovato and the largest consumer magazine publishing group – Bauer Media Group.

Together we offer the Government access to 24.4M Australians via the Letterbox and a further 15.6M Australians with 6.3M through magazine subscriber readership to inform and communicate COVID-19 safety information and social welfare counselling numbers.

As an essential service media and communication as well as an essential services supply chain provider industry we will:

> Develop a flyer and advertisement with Government,
> Produce the flyer for letterbox delivery to every home in the country,
> Include the advertisement across all consumer magazines and digital mastheads,
> Distribute to every home in Australia.

7.3 SURFACE STABILITY COVID-19 INFORMATION

The Collective has worked with our paper mills and distributors across the world and developed a referenced and credible information sheet for Industry and wider network. This is readily available on our website under the newly developed COVID-19 section (www.therealcollection.com.au/covid-19).

INFORMATION
COVID-19 SURFACE STABILITY

INTRODUCTION

The COVID-19 pandemic sweeping across the globe is an unprecedented time and information is being developed in a fluid and changing environment.

To that end, the Australasian Paper Industry Association and The Real Media Collective, working collaboratively, have reviewed research and commentary for your consideration in specific regard to the COVID-19 virus life-span on paper and other surfaces.

THE SCIENCE

The latest and most referenced scientific research of COVID-19 surface rate of infection is the *'Aerosol and Surface Stability of HCoV-19 (SARS-CoV-2) compared to SARS-CoV-1'* published in The New England Journal of Medicine (doi: 10.1056/NEJMc2004973).

Within this research, surface stability was evaluated across plastic, stainless steel, copper, and cardboard across a range of household and hospital situations. It must be noted, paper as used for print marketing, catalogues, magazines or other commercial requirements has not been tested. In this paper we will refer to the closest substrate tested: Cardboard.

Lloyd-Smith, Author of the 'Aerosol and Surface Stability of HCOV-19 (SARS-CoV-2) compared to SARS-CoV-1' commented:
"In a laboratory experiment, the conditions are pretty carefully controlled and constant," he says. By comparison, "in the real world, conditions fluctuate" — conditions like temperature, humidity and light. So, the survivability may vary, too. For instance, if the virus contaminates a sunny windowsill or countertop, it may not last as long.

Daniel Kuritzkes, Infectious Disease Expert, Brigham and Women's Hospital
"Ultraviolet light can be a really powerful disinfectant and we get a lot of UVA light from the sun," says Daniel Kuritzkes an infectious disease expert at Brigham and Women's Hospital. "Direct sunlight can help rapidly diminish infectivity of viruses on surfaces," he says. He was not involved in the new research.

The World Health Organization states:
"The likelihood of an infected person contaminating commercial goods is low and the risk of catching the virus that causes COVID-19 from a package that has been moved, travelled and exposed to different conditions and temperature is also low."

The World Economic Forum comments on the official guidelines being that the risk is low:
"In general, because of poor survivability of these coronaviruses on surfaces, there is likely very low risk of spread from products or packaging that are shipped over a period of days or weeks at ambient temperatures," the Centres for Disease Control have said.

INFORMATION
COVID-19 SURFACE STABILITY

FINDINGS

The findings concluded the virus on substrates as follows:

Source: 'Aerosol and Surface Stability of HCOV-19 (SARS-CoV-2) compared to SARS-CoV-1', 2020

Viable COVID-19 could be detected in aerosols up to three (3) hours post aerosolization, up to four (4) hours on copper, up to twenty-four (24) hours on cardboard and up to two-three (2-3) days on plastic and stainless steel. Both viruses show relatively long viability on stainless steel and polypropylene (plastic) compared to copper or cardboard: the median half-life estimate for COVID-19 is around thirteen (13) hours on steel and around sixteen (16) hours on polypropylene (plastic).

IS MY MAIL SAFE?

Across Australia and New Zealand, print and mail processing time occurs over more than three (3) days which is additional support of the advice from experts that your mailbox including letters, magazines and packages are safe.

"In general, because of poor survivability of these coronaviruses on surfaces, there is likely very low risk of spread from products or packaging that are shipped over a period of days or weeks at ambient temperatures," U.S Centre of Disease Control and Prevention.

In addition, Australia Post and NZ Post are implementing further safety across signature and social distancing practices to already existing safety and handling measures.

Australia Post - To help protect our posties, drivers and customers, in addition to measures already introduced around signature for delivery, again – we are asking for the practice of good social isolation techniques. If you are showing symptoms, please let your postie or driver know. If you are not, please, we again ask customers to keep a distance of at least one metre from people, and continue to practice good hygiene. For more information: https://auspost.com.au/about-us/news-media/important-updates/coronavirus

NZ Post - While the overall risk of transmission of any virus is low in our day to day business operations, it's the right thing to do to limit close physical contact with others during this time. This is consistent with the Government's advice. NZ Post posties will maintain social-distancing with two-metres from doors for parcel delivery. Required Product will accept a name as proof of delivery, instead of a signature. For more information: https://www.nzpost.co.nz/business/covid19updates

INFORMATION
COVID-19 SURFACE STABILITY

GRAPHICAL REPRESENTATION OF THE TIME OF VIABLE VIRUS DETECTION BY SUBSTRATE
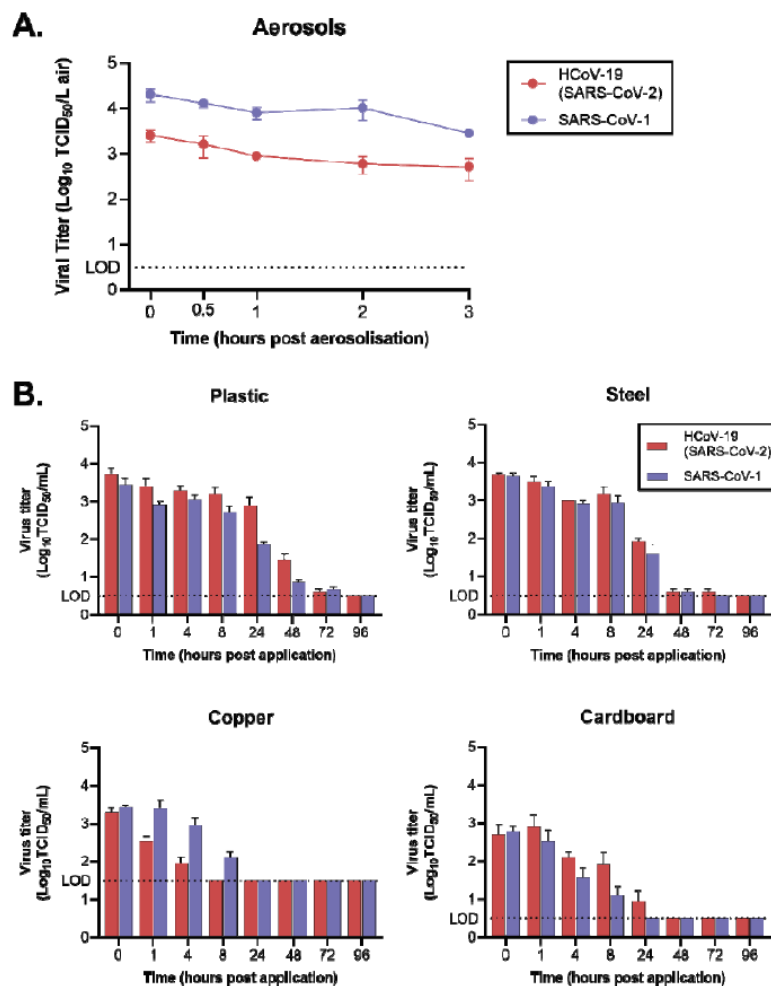
INFORMATION
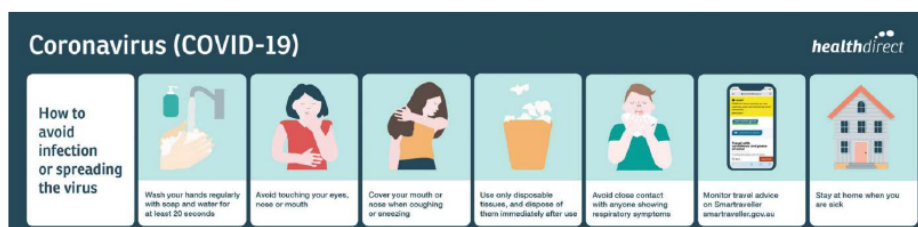# COVID-19 SURFACE STABILITY

CONCLUSION

The findings of the study across surface contamination and further international literature supports guidance from public health professionals across the world, to slow the spread of COVID-19:

> Avoid close contact with people who are sick,
> Avoid touching your eyes, nose and mouth,
> Stay home when you are sick,
> Cover coughs or sneezes with a tissue, and dispose of the tissue in the rubbish,
> Clean and disinfect frequently touched objects and surfaces using a household cleaning spray or wipe, and
> Wash your hands regularly.

Cardboard, and through this, assumption of paper or fibre-based products including mail, as well as Polypropylene, and through this, assumption of low-grade plastics such as polyethylene for magazine wraps, is reported as carrying a low risk of contamination.

The mechanical process of print, mail processing and mail lodgement, across ambient conditions and over a longer period than three (3) days provides additional reassurance and aligns with expert advice.

Following the recommended guidelines from Government at all times across all substrates you encounter will slow the spread of COVID-19.

Coronavirus (COVID-19) — How to avoid infection or spreading the virus. healthdirect

INFORMATION
COVID-19 SURFACE STABILITY

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7.5 ECONOMIC STIMULUS PACKAGE REFERENCE GUIDE

To support our members, the broader industry, employees, households and our wider networks across Australia the Collective has developed in partnership with our Chartered Accountant partners an Economic Stimulus Reference Guide to assist businesses understand how to access Government stimulus initiatives.

This was released to our direct membership of 819 recipients and in the secondary release issued to our entire database of 6,891 businesses across Australia.
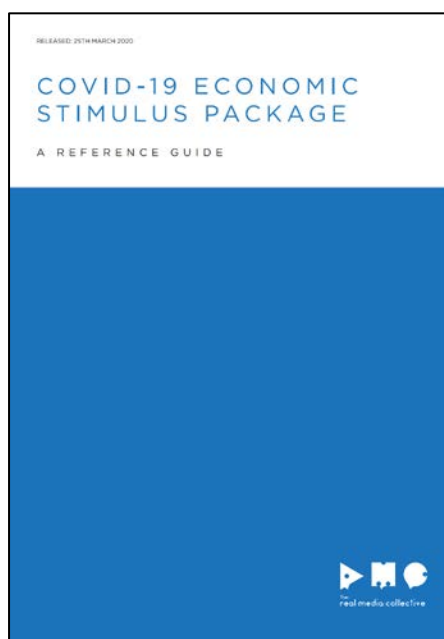
To further support the industry, the Collective has appointed a GM – IR, Policy and Governance resource. The resource selected is the leading industry expert across industrial relations with thirteen (13) years-experience specific to the sector.

This announcement was released to all of industry with an offer to provide IR services to all of industry not excluding non-members, to ensure the industry is well briefed during this pandemic period.

INDUSTRY INITIATIVES CONCLUSION

Industry will continue to work on initiatives to develop across this period and are open to Government suggestions of how we can work better together.

8.0 Conclusion

For the multiplicity of reasons outlined herein we seek exemption from any further restrictions to the paper, print, publishing, mail and distribution sector. We ask that this industry be rightly considered under the essential service framework across delivery of media and communications and the supply chain associated with our broad and vital infrastructure.

The channels we represent are often overlooked without good measure. Our research across readership and effectiveness demonstrates we reach all Australians from all demographics. We are entrenched into the fabric of society from the products we produce, the content we develop and the digital divide we overcome.

Our industry is the largest manufacturing employer across the country with many families and communities relying on not only the goods we deliver but also the livelihoods we support.

During a critical crisis such as these unchartered territories, the marriage of society's need to receive communications and products whilst holding our sense of belonging through employment is never more strongly recognised.

Our industry has listened and heard the Prime Minister in celebrating industries that are navigating this time by doing things differently, applying innovation and collaboration. We are working with Publishers and Australia Post, with Printers and Distributors, with Retailers and Customers, with our direct Members and other Industry Associations.

We will continue to keep our workers and the communities they belong to safe with protocols and procedures – continuously reviewed and monitored.

We ask only in return that the Government keep us open for business, open for all Australians.

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