

How will the COVID-19 crisis affect demand for social services?

Interim Report: October 2021

Prepared for



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PREPARED BY

Tom Barnes

Senior Research Fellow, Institute for Humanities and Social Sciences, Australian Catholic University

Scott Doidge

Researcher, ACU Engagement, Australian Catholic University

Not for public release or citation without written consent from Tom Barnes. All correspondence to tom.barnes@acu.edu.au or sesu@acu.edu.au.

ACKNOWLEDGMENT OF COUNTRY

In recognising Aboriginal and Torres Strait Islander peoples' spiritual and cultural connection to Country and in continuing ACU's commitment to Reconciliation, the authors acknowledge the First Peoples and the Traditional Owners and custodians of the Country where ACU campuses are located.

We respectfully acknowledge Elders past and present and remember that they have passed on their wisdom to us in various ways. Let us hold this in trust as we work and serve our communities.

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Executive summary

This Interim Report is the first report delivered to Catholic Social Services Victoria and St Mary's House of Welcome for a project conducted through Australian Catholic University's (ACU) Stakeholder Engaged Scholarship Unit (SESU). Focusing on Victoria and producing parallel analyses for Greater Melbourne and regional areas, the project aims to document, analyse, and develop projections about the impacts of the COVID-19 crisis at *two levels*.

First, the project aims to generate findings at a *macro-level* in terms of changes to:

- unemployment and under-employment among women and men;
- youth unemployment;
- socio-economic conditions for temporary migrants excluded from JobKeeper, JobSeeker and related policies, including international students, asylum seekers and refugees;
- economic inequality, including income, asset wealth and housing;
- poverty, income support and homelessness.

Second, the project aims to generate findings at a *micro-level* in terms of changes to the operations, experiences and challenges of social service providers in Victoria related to:

- emergency relief;
- food distribution in the community;
- help for the homeless;
- help for victims of family violence;
- changing revenue streams;
- changing demographic characteristics of clients and others seeking assistance;
- changing capabilities of organisations affected by public health orders, including those related to extended lockdowns and vaccination programs.

The project is anticipated to generate findings for five key periods:

1. Pre-Pandemic—before February/March 2020;
2. the First Wave—March-June 2020;
3. the Second Wave in Victoria—June-October 2020;
4. the 'Zero COVID' Hiatus—October 2020-June 2021;
5. the Third Wave and beyond—July 2021-?

Based on analysis of economic forecasting from government and private agencies, the project will also look to develop qualitative projections for FY2021/22 and beyond.

THIS INTERIM REPORT FINDS THAT...

1. 2020's crises of job loss and labour market insecurity were worse in Victoria than the rest of Australia, worse for women, and worse for young people.

- The COVID-19 pandemic created an unprecedented social and economic crisis, reflected in rising unemployment, under-employment, and rising financial precarity.
- Unemployment has been significantly worse in Victoria compared to national trends, rising to over 7 percent by October 2020 while unemployment was declining in the rest of Australia.
- Unemployment peaked at a higher rate for women, reflecting women's exposure to sectors with the worst job losses. In Victoria, female unemployment reached a peak of 8.5 percent in October 2020 compared to 6.2 percent for men.
- Youth unemployment trended higher in Victoria than the rest of Australia, rising to 18.1 percent in October 2020, 3.6 points higher than the national rate. The number of people aged 25-34 claiming JobSeeker more than tripled from less than 32,500 in December 2019 to over 100,000 in September 2020.
- Young workers and women were more likely to be working in industries with the highest rates of job loss, such as hospitality, which experienced a 32.1 percent decline during the September Quarter 2019/20 and a further 18.9 percent fall during the second wave, or arts and recreation, where jobs fell 33.4 and 21.2 percent, respectively.
- Under-employment was worse in Victoria than the rest of Australia, nearly doubling during the pandemic in 2020. Under-employment peaked at 15 percent in September 2020, at a time when under-employment was falling rapidly elsewhere.

2. The Federal Government’s economic response to COVID-19 was based upon the exclusion of temporary migrants from JobKeeper, JobSeeker and related policies. This decision plunged millions into financial hardship and destitution, generating untold suffering across our community.

- The impacts of exclusion should not be under-estimated: prior to the pandemic, every eighteenth worker in Victoria had arrived from overseas within the last 5 years (5.7 percent). For these workers, unemployment peaked at 18.3 percent in June 2020—nearly 3 times higher than peak unemployment for Australian-born workers.
- Nearly half of these most recent arrivals (46.5 percent) came from countries in South or Central Asia. Unemployment for this group peaked at a remarkable 24 percent, around four times the rate of Australian-born workers.

3. Rapid falls in headline unemployment disguise the failure of resurgent economic growth to return those workers and households experiencing the most vulnerability to pre-pandemic social and economic conditions. The most vulnerable were worse off before the Third Wave than they were before the First Wave.

- The number of JobSeeker recipients in Victoria, which increased by over 125 percent during the peak of the crisis in 2020, was still 50 percent higher than pre-pandemic levels in June 2021. The number of young people on Youth Allowance (Student or Apprentice) and Youth Allowance (Other) was 61 and 37 percent higher, respectively.
- On the eve of the Third Wave (June 2021), caseload numbers in the jobactive system were nearly double the pre-pandemic level—and *more than* double for Greater Melbourne. The number of female jobactive clients was 94 percent higher. The number of Aboriginal and Torres Strait Islander clients was two-thirds higher and the number of refugee clients was 50 percent higher.

- For recently arrived migrants, unemployment fell after the Second Wave but did not recover to pre-pandemic levels. The average ‘gap’ between unemployment rates for recent arrivals from South/Central Asia and Southeast Asia and unemployment for Australian-born workers was 1.1 and 1.4 percent higher for the period December 2020-June 2021 than the pre-pandemic period.
- The failure of economic policy to help those experiencing the most vulnerability is further highlighted by the inadequacies of COVID Disaster Payments. Those already receiving welfare payments were excluded from this scheme. At the time of writing, this policy was due to be wound down as vaccination rates continued to rise.

4. COVID-19 has profoundly reshaped the activities of social service providers in Victoria. These organisations remain resilient and remarkably effective during challenging times—however, ongoing problems highlight the need for further attention by government.

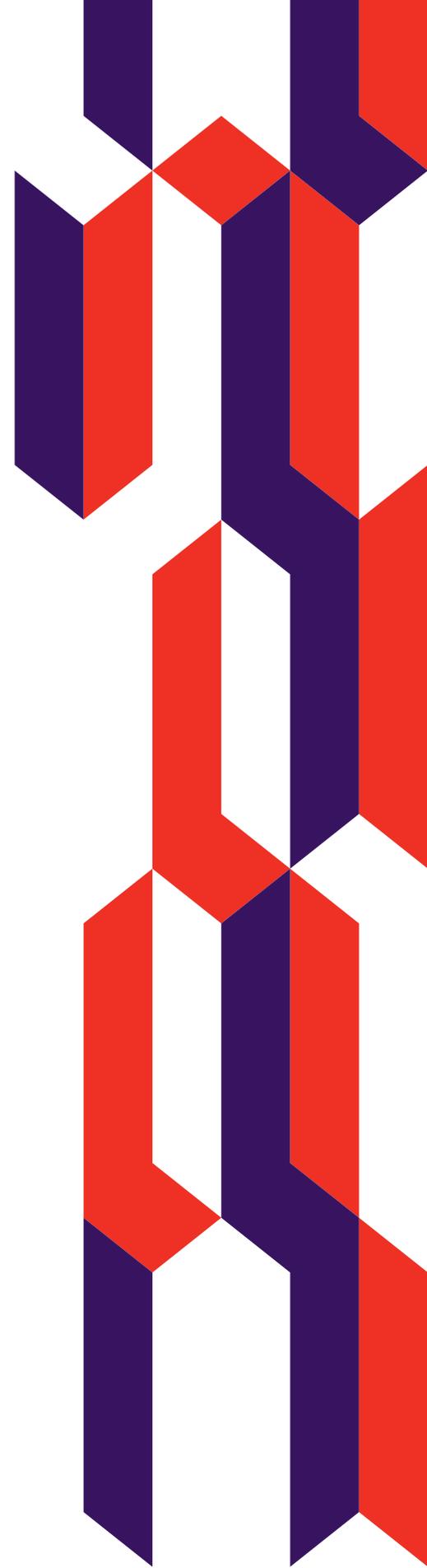
- Organisations who depended upon retail sales for operating income were significantly affected. After many years of growth, sales for FY2019/20 fell significantly.
- Volunteers—the lifeblood of social services—withdrew in large numbers during the crisis, a problem worsened for older volunteers and women. For some organisations, volunteer shifts have declined by over half in 2021 so far, including estimates of over 90 percent in some inner-Melbourne suburbs that have high demand for emergency relief.
- Despite these challenges, demand for food distribution and meals in the community *increased significantly*. In some cases, the number of meals served more than doubled in 2020 compared to 2019.
- In-bound calls for emergency relief fell during much of 2020 as many previous callers were able to benefit from policies such as the Coronavirus Supplement. For FY2019/20, calls dropped by nearly 40 percent for some organisations. The gradual withdrawal of government assistance saw a return to pre-pandemic levels.
- 2020 saw a significant change in the demographic composition of callers. In some cases, the number of callers with *no income*, such as temporary migrants and international students excluded from JobKeeper or JobSeeker, increased by 2.5 times from February-September 2020. A significant proportion were also first-time callers.

- In-bound calls to organisations assisting victims of family violence also fell in 2020. Unlike calls for emergency relief, this did *not* reflect less need. Organisations reported an increase in the severity of family violence as well as an increase in perpetrators using public health orders as an excuse to worsen coercive and controlling behaviours.
- These organisations reported a rise in the number of women from culturally and linguistically diverse (CALD) backgrounds seeking assistance—from 22 to 26 percent for FY2019/20 in some cases. Despite new commitments to social and community housing from the Victorian Government in 2020, the absence of alternative accommodation remained one of the greatest structural barriers confronting women and children attempting to flee family violence.

5. Future reports from this project will include analysis of:

- socio-economic impacts from the Third Wave;
- trends in economic inequality, including income, asset wealth and housing;
- updated economic forecasts;
- more detailed longitudinal analysis of anonymised service provider data.

A fully revised version of the Interim Report is due for delivery in c. February 2022.



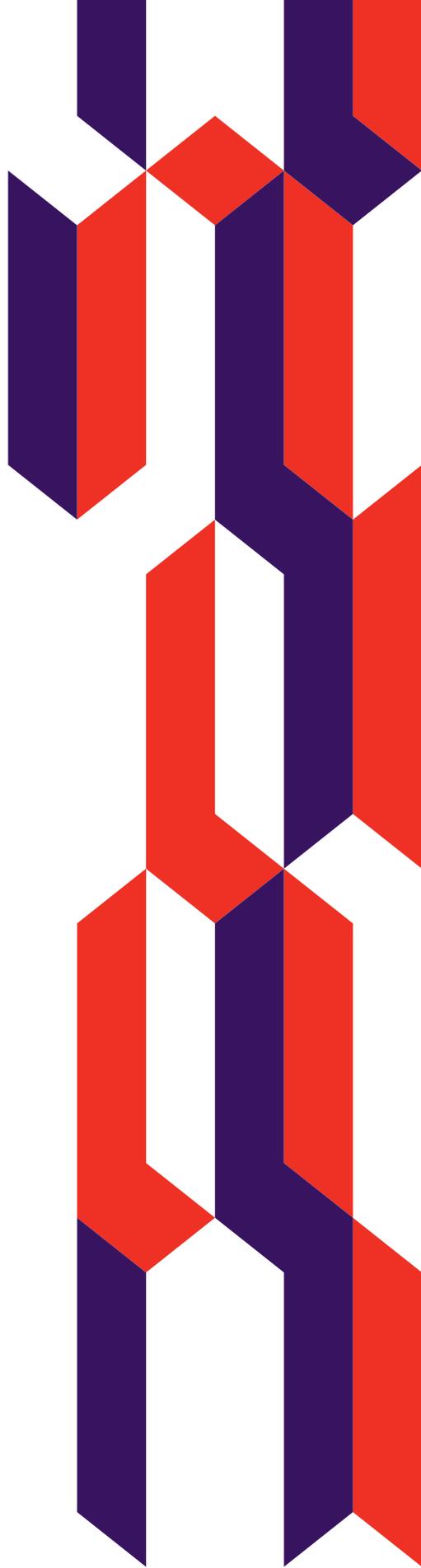
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1. Introduction

This is the first report delivered to Catholic Social Services Victoria and St Mary's House of Welcome for a project conducted through Australian Catholic University's (ACU) Stakeholder Engaged Scholarship Unit (SESU). The name of the project, and this Interim Report, also provides our guiding research question: 'How will the COVID-19 crisis affect demand for social services?'

The report begins to address this question by presenting and analysing data across key dimensions of the project scope. Through the provision of follow-up reports and updated data analysis as the COVID situation evolves over FY2021/22, our intention is to provide qualitative projections about the likely number and composition of people seeking assistance as we head, gradually and unevenly, into a 'post-pandemic' world.

This report is about Victoria, with parallel analyses for Greater Melbourne and regional Victoria, as well as inclusion of national-level trends for comparative purposes. The report is framed to take account of change over four time periods:

1. the Pre-Pandemic Period—before February/March 2020;
2. the First Wave—March-June 2020;
3. the Second Wave in Victoria—June–October 2020;
4. the 'Zero COVID' Hiatus—October 2020–June 2021.

There is, of course, a fifth period which dominates current discourse about the pandemic: the Third Wave, which emerged in Sydney in late June 2021 and then spread to different parts of Australia, including to Victoria where, at the time of writing, a sixth period of lockdown was underway. The project intends to fully incorporate and analyse trends over the course of the Third Wave and beyond, including the impact of relaxed lockdown rules as vaccination rates rise.

However, the timing of this report means that data on the Third Wave was still emerging at the time of writing. Its focus, therefore, is on change *until* the onset of the Third Wave in June/July, with a focus on findings and lessons which can help to inform advocacy efforts for the immediate period.

The report provides analysis and findings across four main sections. Section 2 focuses on the 'headline' problems of unemployment and under-employment during the four phases (Pre-pandemic, First Wave, Second Wave, Zero-COVID Hiatus). This section provides a comparative analysis of trends nationally with trends in Victoria, as well as differences between Greater Melbourne and regional Victoria, and between the experiences of women and men. It includes commentary on labour market forecasts, although these findings remain indicative as updated data continue to emerge.

Section 3 focuses on the problem of **exclusion**: specifically, the Federal Government's decision to exclude millions of temporary migrants from core protections during the 'COVID recession', including and especially the JobKeeper scheme, the re-badged JobSeeker payment, and the Coronavirus Supplement which mitigated against financial hardship for millions of people in the 12 months following the beginning of the First Wave. As well as distilling findings from secondary source material on the experiences of temporary visa holders, this section offers original analysis of differential unemployment trends among recently arrived migrants.

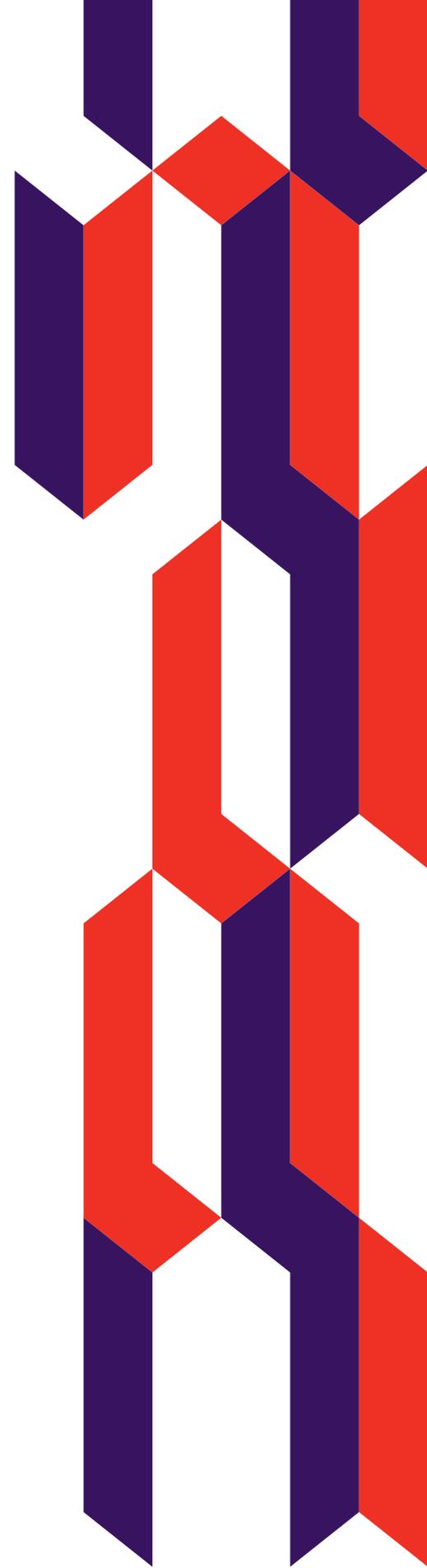
Section 4 focuses on the problem of the **failed 'recovery'** for hundreds of thousands of low-income workers and welfare recipients during the 'Zero COVID Hiatus' between October 2020 and July 2021. After briefly summarising the effects of JobKeeper and the Coronavirus Supplement, this section explores the lasting impacts of unemployment on young workers, women, and the jobseekers experiencing the most vulnerability such as refugees and Aboriginal and Torres Strait Islander peoples.

Drawing data from unemployment trends and jobactive caseload numbers until the end of FY2020/21, the report finds that, despite rhetoric of a 'resurgent' national economy,

labour market insecurity failed to ‘bounce back’ for hundreds of thousands of unemployed and precariously employed workers. Our evidence shows that these people were in a *more precarious* situation as the Third Wave crisis emerged when compared to the situation prior to the First Wave in early 2020.

Section 5—the final section—explores the relationship between the COVID crisis and the activities of service providers in Victoria. Using original analysis of anonymised data from key agencies, this section outlines changes to revenue streams, volunteering, food distribution services, inbound calls for assistance and services for women and children experiencing family violence.

The section concludes the report by drawing on quantitative and qualitative data from 9 organisations engaged in Melbourne and/or regional Victoria, laying the basis for more fine-grained analysis of data trends and projections as updated, higher-frequency time series becomes available for future reports. In addition, future reports will include analysis of trends in economic inequality, including dimensions of income, asset wealth and housing inequality, across the five phases of the crisis from Pre-Pandemic to the Third Wave.



2. Changing unemployment and under-employment among women and men in Victoria during the COVID crisis

The COVID-19 pandemic created an unprecedented social and economic crisis, reflected in rising unemployment, ballooning under-employment, and rising financial precarity (van Barneveld et al., 2020; Coibion et al., 2020; Connell, 2020). As is now well understood, unemployment rose sharply following the onset of the pandemic in Australia in February 2020, which was followed by border closures and the initiation of lockdowns across the country.

Australia-wide, unemployment increased sharply from 5.1 percent in February 2020 to 6.4 percent in April 2020. During the First Wave, unemployment peaked at 7.4 percent in June/July 2020. Due largely to the impact of the Second Wave in Victoria, unemployment increased again in September 2020, having fallen back at the beginning of FY2020/21 under the influence of the Federal Government's emergency fiscal expansion.

After November 2020, unemployment began to decline to pre-pandemic levels. However, the most recent data—and earlier government forecasts—do not fully incorporate the impacts of the Third Wave which began in NSW in late June 2021 and spread rapidly to Victoria and the ACT, with milder but uneven impacts in other regions.

A further feature of national trends is that unemployment for women peaked higher than unemployment for men, at 7.5 percent in July 2020, pushing over 7 percent again under the impact of the Second Wave in Victoria in October and November 2020 (Figure 2.1).

In Victoria, unemployment trended below the national unemployment rate during the First Wave. Unsurprisingly, the impact of the Second Wave in Victoria meant that state unemployment was eventually to rise above the national average, especially while Greater Melbourne remained in months of extended lockdown throughout 2020. By the end of the Second Wave in October 2020, unemployment in Victoria had increased 6.7 to 7.2 percent during a period in which the national rate fell below 7 percent (Figure 2.2).

THE UNEQUAL IMPACT ON WOMEN

A central feature of unemployment in Victoria during the pandemic has been its greater impact on women (Carson et al., 2020; ACTU, 2021; Wood et al., 2021). In contrast to the national unemployment rate, women's unemployment was *already* higher than men's unemployment in Victoria prior to the pandemic. Although the gap between the two rates shrank during the First Wave, it widened considerably during the Second Wave. Female unemployment peaked 2.4 points higher than male unemployment in October 2020 at 8.6 percent compared to 6.2 percent (Figure 2.3).

BALLOONING YOUTH UNEMPLOYMENT

A further sign of the greater impact of the COVID recession in Victoria compared to the rest of Australia was youth unemployment. Prior to the pandemic, youth unemployment was generally lower in Victoria than nationally. During the First Wave, youth unemployment in Victoria began to rise above the national level, exceeding 16 percent by June 2020 before ballooning, under the impact of the Second Wave, to 18.1 percent in October. By this time, national youth unemployment was (a still high) 14.5 percent, or 3.6 points lower (Figure 2.4). Ballooning youth unemployment reflected the concentration of young workers in sectors which were highly sensitive to community lockdowns, such as accommodation and food services, or who were more likely to be exposed to the risks of casual work.

As we demonstrate in Section 4 below, rising youth unemployment had major implications for the demographic composition of labour markets and welfare transfers. A further indication of changes in labour market composition was an apparent connection between the percentage of people enrolled in tertiary education institutions and not in the labour force—i.e., including those young workers who had temporarily given up looking for work during the crisis—and rising youth unemployment (Figure 2.5).

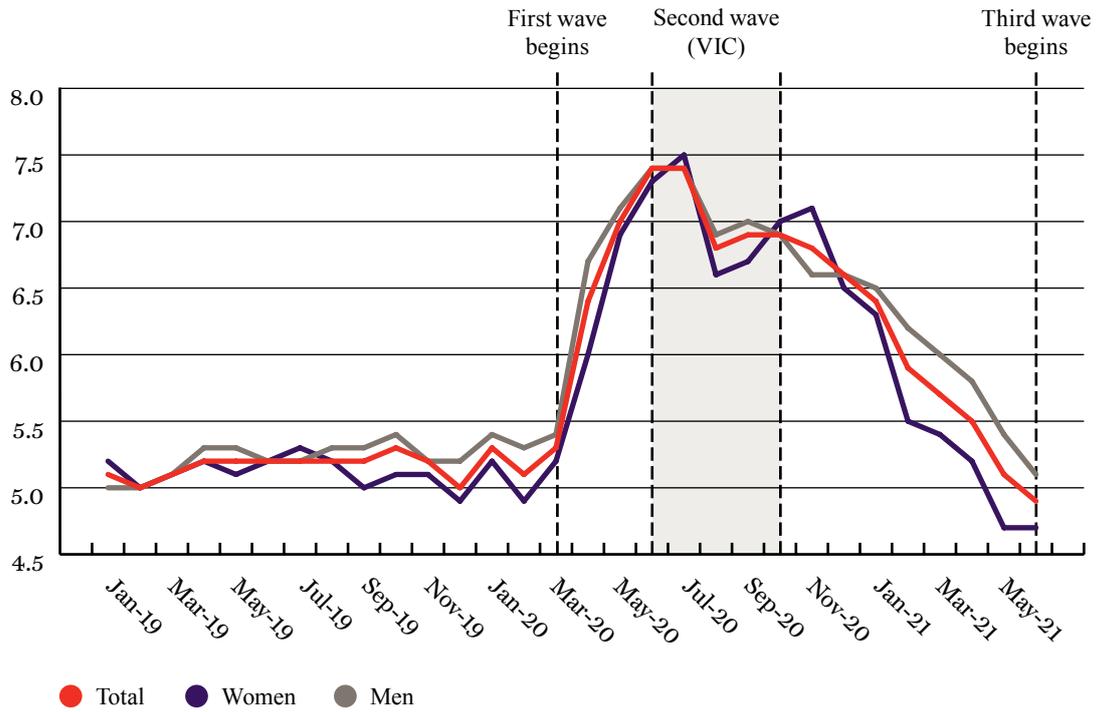
COMPARING UNEMPLOYMENT IN GREATER MELBOURNE AND REGIONAL VICTORIA

Unemployment has remained higher in Greater Melbourne than regional Victoria throughout the pandemic. In part, this reflects a longer-term trend—unemployment in Melbourne was already higher than regional areas prior to the pandemic. During the 12 months prior to the pandemic (March 2019-March 2020), monthly unemployment for Melbourne averaged 5.3 percent compared to 3.9 percent in regional Victoria.

This gap widened during the pandemic. During the First Wave (April-June 2020), unemployment in Melbourne averaged 7.2 percent compared to 4.4 percent. This represented an increased 'gap' of 1.2 points (from 1.4 to 2.6 percentage points) between Melbourne and regional Victoria. The gap remained high during the Second Wave (July-Nov 2020): 7.3 percent compared to 5 percent on average.

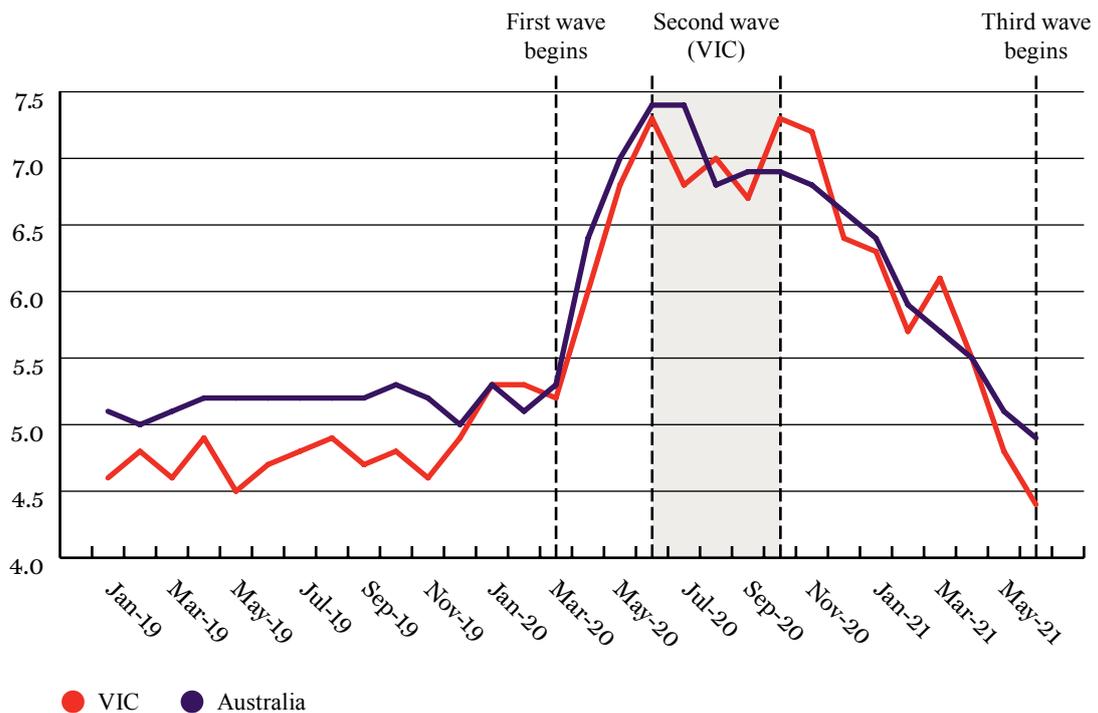
Even after the Second Wave had ended, unemployment in Greater Melbourne persisted at 6.5 percent or higher until the beginning of Q4-2020/21. By January 2021, headline unemployment across the city was still 7.5 percent during a period widely popularised as one of rapid national 'recovery' (Figure 2.6).

FIGURE 2.1 UNEMPLOYMENT RATE FOR WOMEN AND MEN - AUSTRALIA



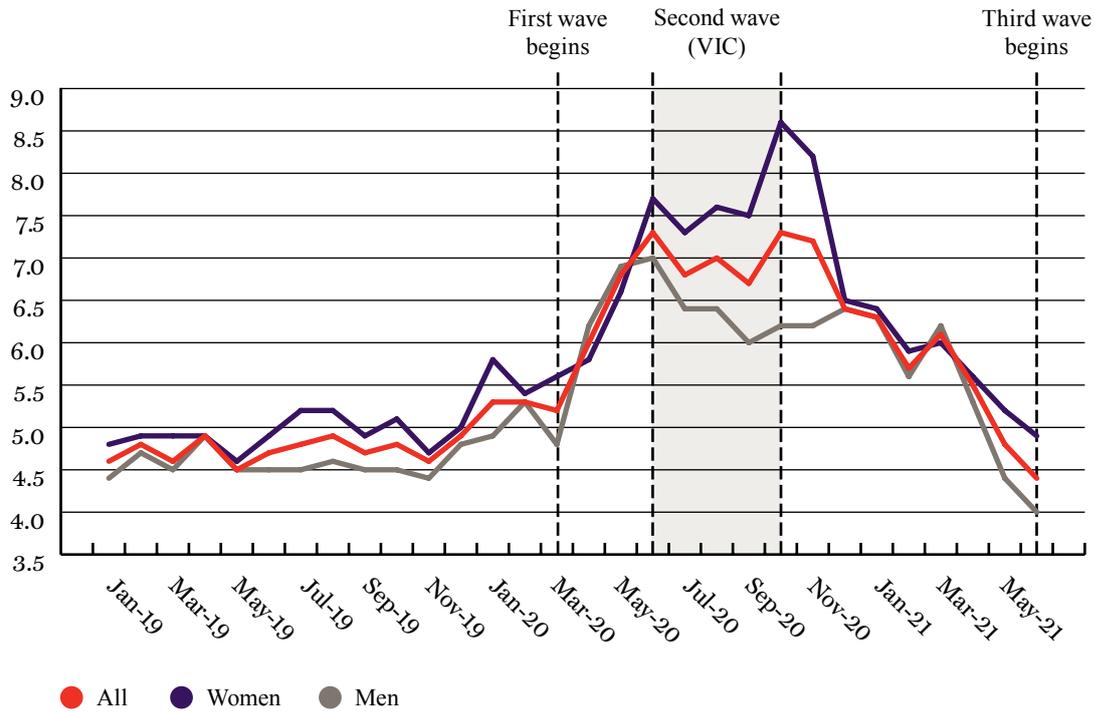
Source: Authors' calculations of data from ABS (2021)

FIGURE 2.2 UNEMPLOYMENT RATE - VIC AND AUSTRALIA



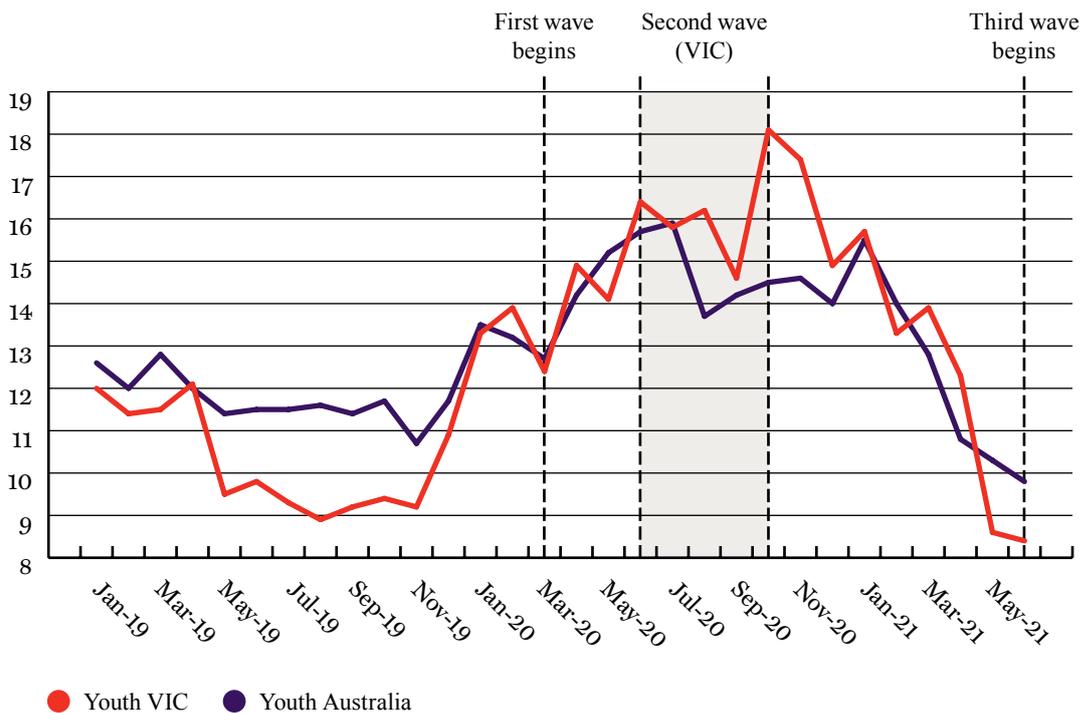
Source: Authors' calculations of data from ABS (2021)

FIGURE 2.3 UNEMPLOYMENT RATE - WOMEN AND MEN IN VIC



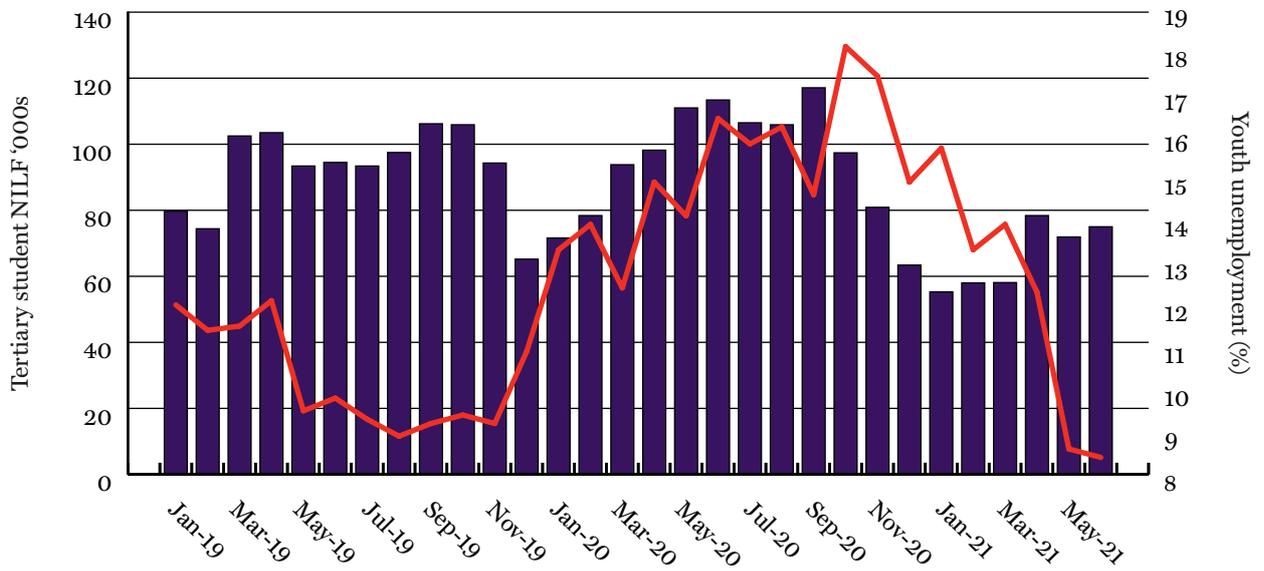
Source: Authors' calculations of data from ABS (2021)

FIGURE 2.4 YOUTH UNEMPLOYMENT (15-24 YO) - VIC AND AUSTRALIA



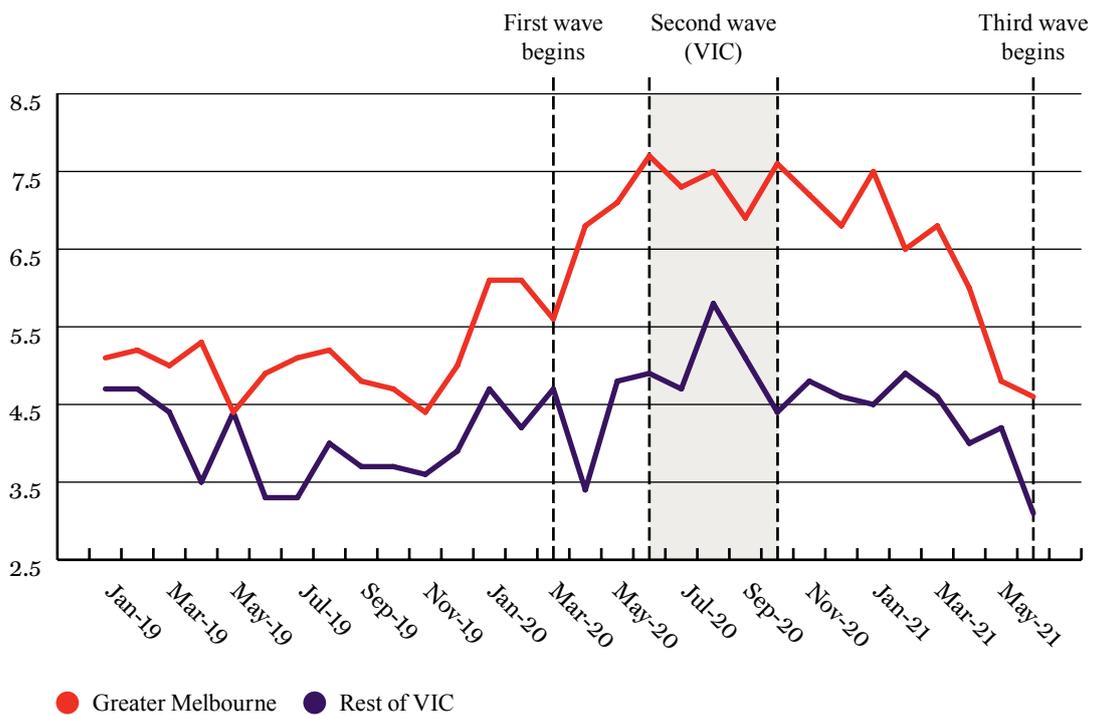
Source: Authors' calculations of data from ABS (2021)

FIGURE 2.5 YOUTH UNEMPLOYMENT AND TERTIARY STUDENTS NOT IN THE LABOUR FORCE (VIC)



Source: Authors' calculations of data from ABS (2021)

FIGURE 2.6 UNEMPLOYMENT RATE - GREATER MELBOURNE AND REST OF VIC



Source: Authors' calculations of data from ABS (2021)

JOB LOSSES BY SECTOR

In Victoria, as nationally, job losses were more heavily concentrated in some industries than others. From the March to the September Quarter of 2020 (i.e., from the pre-pandemic period to the decline of the Second Wave), total employment in Victoria fell by 2.9 percent in absolute terms. This decline was concentrated in some sectors more than others.

For example, the largest employing sector, healthcare and social assistance, which includes early childhood and home care services, experienced a lower 2.4 percent decline. The second and third largest sectors pre-pandemic—retail trade and professional, scientific, and technical services—experienced *increases* in employment of 8.2 and 3.7 percent, respectively over the same period.

In contrast, employment in construction and manufacturing declined by 3.1 and 10.4 percent, respectively. Employment in accommodation and food services fell by 18.9 percent. Although education/training increased by 4.3 percent, this aggregation masks the serious decline in higher education jobs in this category (Figure 2.7).

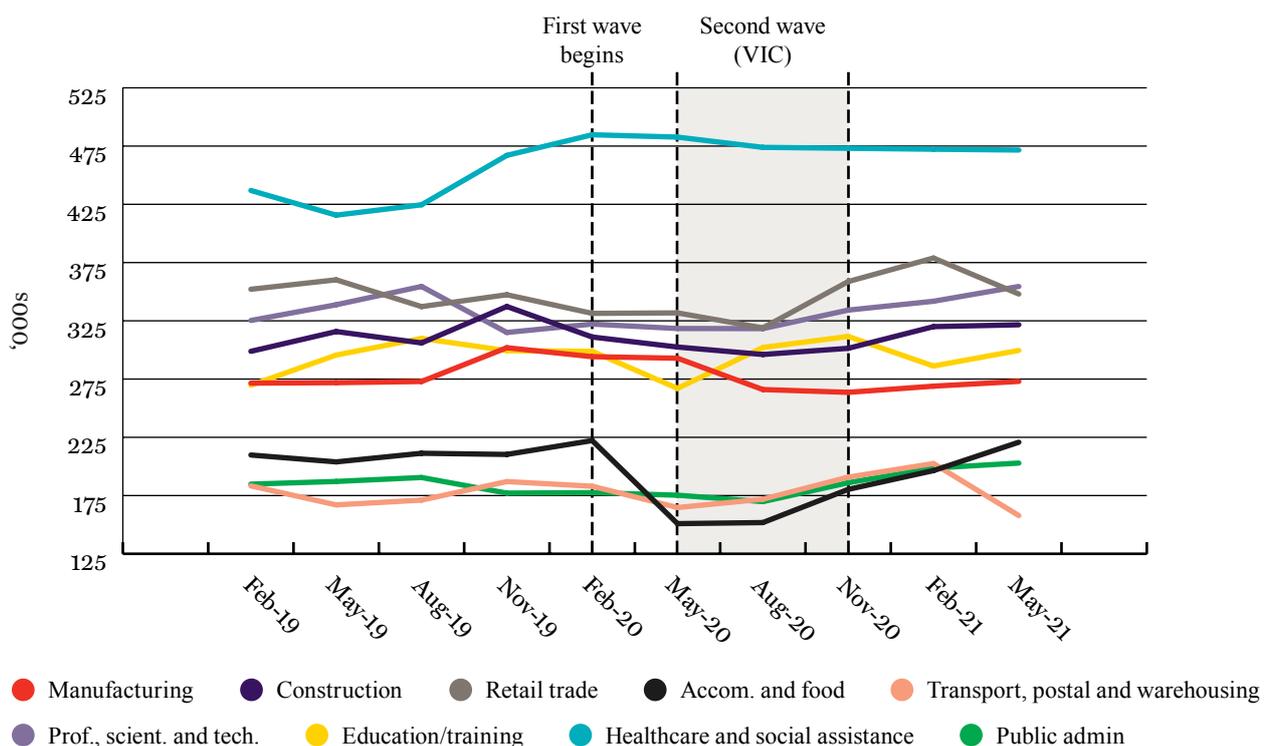
This timescale also masks the severity of the decline for many sectors during the First Wave and, conversely, the effectiveness of fiscal measures designed to save jobs (see below). Despite talk of a national recovery in late 2020, several sectors in Victoria did not fully recover from severe job losses during the first months of the First Wave. For example, the loss of nearly 1 in 5 jobs in accommodation and food services during the First and Second Waves in 2020 was followed by a fall of nearly a third (32.1 percent) in the June Quarter. Furthermore, administration and support services fell by 18.3 percent in the June Quarter to record

a total decline of 9.7 percent during the pandemic until the December Quarter. The arts sector lost 1 in every 3 jobs (33.4 percent) during the June Quarter to record a total decline of 21.2 percent until the December Quarter.

These findings are analysed in Figure 2.8, which records quarterly changes to employment in selected industries. The selection criterion for Figure 2.8 was sectors which recorded an absolute jobs decline during the First and Second Waves (March Quarter–December Quarter 2020) of 10 percent or more. Quarterly labour force data shows that the largest decline in employment among these industries was agriculture, forestry and fishing, which fell by 17.3 percent in the 12 months to the June Quarter 2021 and 28.8 percent during the first two waves of the pandemic, especially as international border closures saw a collapse in the seasonal agricultural workforce.

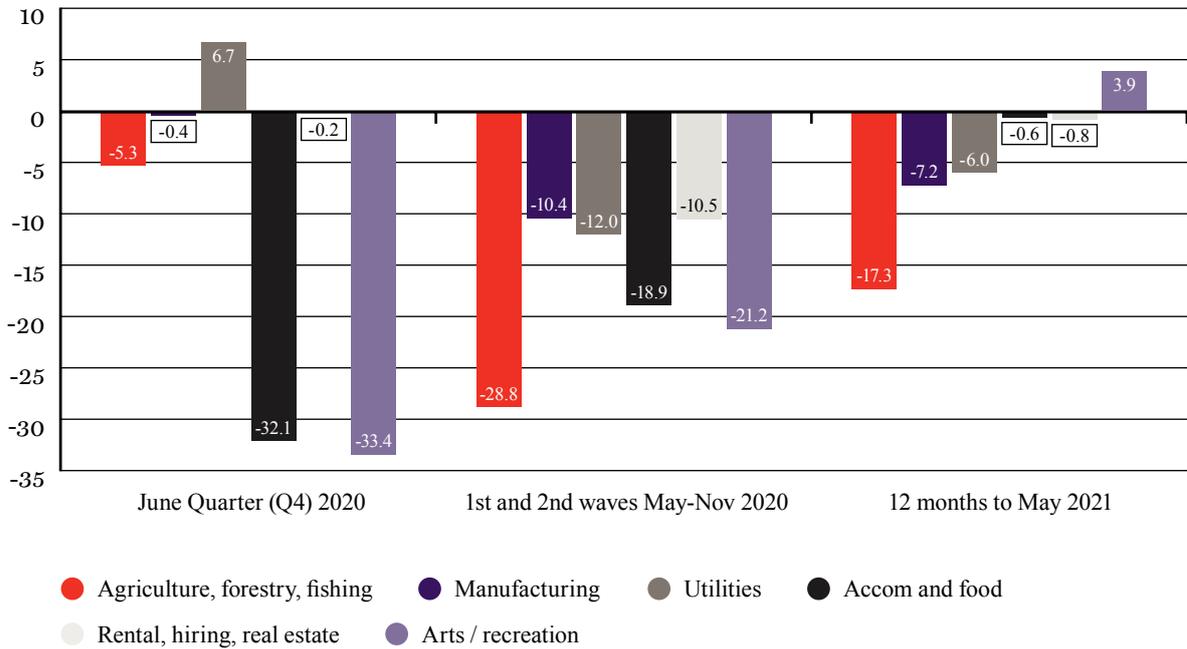
In terms of job loss by volume, however, the key sectors were manufacturing and accommodation/food. The former stood at over 294,000 jobs prior to the pandemic in Victoria. By the June Quarter 2021, manufacturing employment had fallen to approximately 273,000. The latter stood at over 222,000 jobs prior to the pandemic, before declining to less than 221,000 over the same period (Figure 2.8).

FIGURE 2.7 AGGREGATE EMPLOYMENT BY INDUSTRIES WITH >150,000 WORKERS PRE-PANDEMIC (VIC, QUARTERLY)



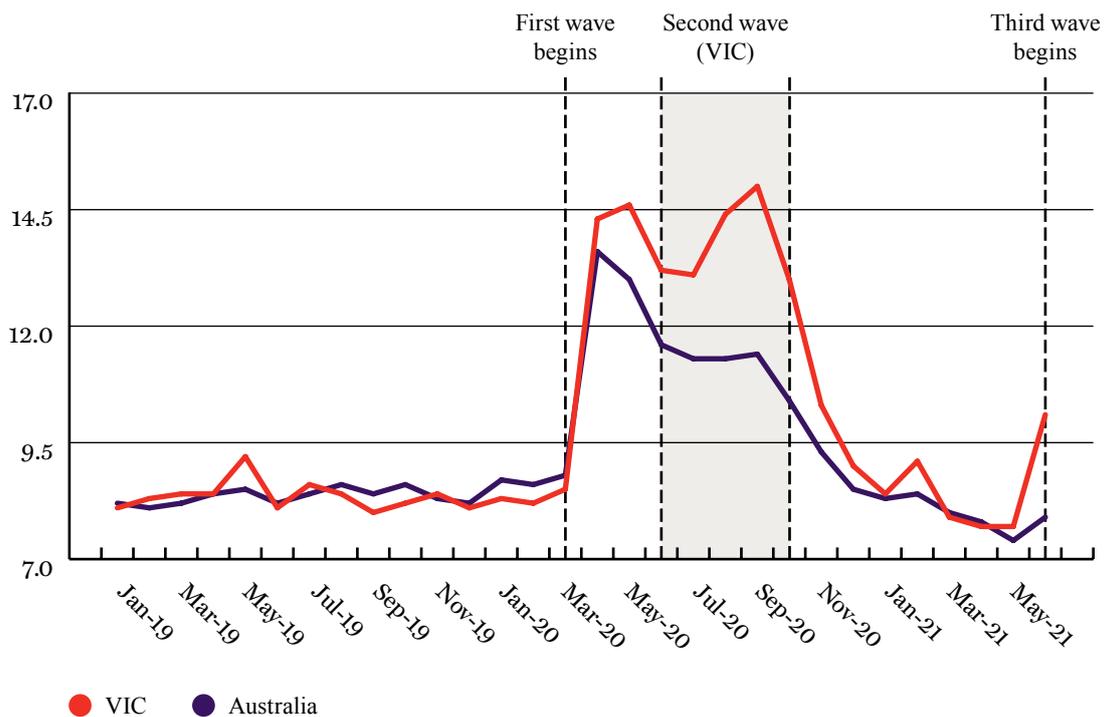
Source: Authors' calculations of data from ABS (2021)

FIGURE 2.8 CHANGE, AGGREGATE EMPLOYMENT (%) FOR INDUSTRIES WITH DECLINE >10% MAY-NOV 2020 (VIC, QUARTERLY)



Source: Authors' calculations of data from ABS (2021)

FIGURE 2.9 UNDER-EMPLOYMENT RATE - VIC AND AUSTRALIA



Source: Authors' calculations of data from ABS (2021)

A CRISIS OF LABOUR MARKET INSECURITY AND UNDER-EMPLOYMENT

It is now widely accepted that the Federal Government's emergency fiscal expansion over the 12 months from March 2020 placed a protective 'floor' beneath the social and economic crisis. Fiscal policy softened the impact of the crisis and prevented a catastrophic collapse in living standards and social cohesion for the majority. Keynote measures included subsidies to business, 'safe harbour' provisions under insolvency trading law, the JobKeeper scheme, the Coronavirus Supplement and a temporary suspension of mutual obligation requirements under the rebadged JobSeeker scheme.

It is equally understood that the Coronavirus Supplement had a major impact on the material wellbeing of millions of jobless workers and poorer households (DAE/ACOSS, 2020). A survey of 634 welfare recipients from the Australian Council of Social Services (ACOSS) in August 2020 found that 81 percent were eating better and more regularly, 71 percent had been able to catch up on bills, and 68 percent had been able to pay for medical or health expenses. Most of these recipients were experiencing long-term disadvantage, with half having received a payment for over two years and over half (55 percent) living in private renting arrangements (ACOSS, 2020).

JobKeeper was particularly effective in enabling businesses to retain workers on the payroll. In the first phase of JobKeeper (30 March-27 September 2020) eligible businesses and not-for-profits were able to receive \$1,500 (before tax) per fortnight per employee to cover the cost of wages. In the second phase (28 September 2020-3 January 2021), the rate was reduced to \$1,200 per fortnight for employees who averaged 20 hours or more a week and \$750 for employees who worked fewer than 20 hours a week. In its final phase (4 January 2021-28 March 2021), the rate was \$1,000 per fortnight for employees who worked 20 hours or more a week on average and \$650 for employees who worked fewer than 20 hours a week (Australian Government, 2021).

Largely because of government fiscal measures such as JobKeeper, unemployment did not reach the most pessimistic 'depression scale' forecasts of early 2020. In terms of jobs overall, 2020 transformed into a crisis of labour market insecurity; of *under-employment* more than 'headline' unemployment.

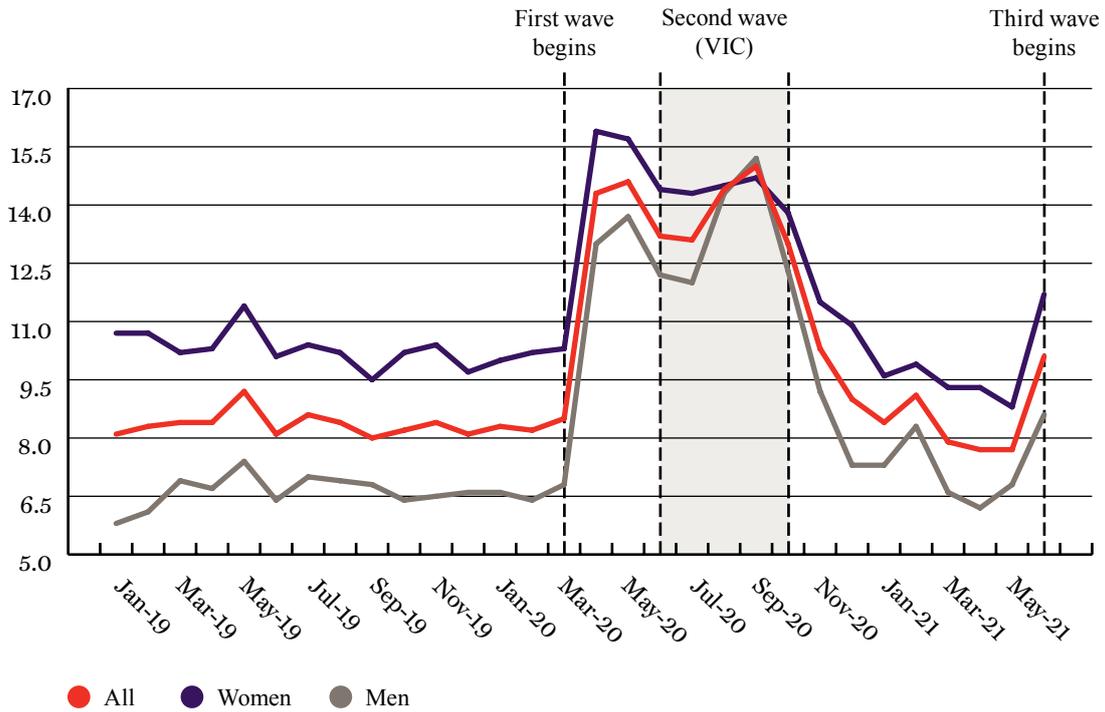
However, the impact of the extended lockdown during the Second Wave meant that under-employment was experienced more sharply in Victoria. Nationally, under-employment increased from 8.8 percent in March 2020 to 13.6 percent in April 2020. After this time, under-employment gradually subsided to reach pre-pandemic levels by early 2021. In Victoria, by contrast, under-employment peaked at a higher level during the First Wave (14.6 percent in May 2020) and, after briefly falling, increased during the Second Wave to 15 percent by September 2020. Under-employment nearly doubled in Victoria compared to pre-pandemic levels. Although it began to fall after this peak, under-employment has remained consistently higher in Victoria than the national average since the depth of the crisis in 2020, and began to rise sharply again immediately prior to the Third Wave (Figure 2.9).

A notable feature in Victoria was the narrowing of the prevailing *under-employment* gap between women and men. Whereas the crisis of unemployment disproportionately impacted on women's jobs, the crisis of under-employment

during the Second Wave saw a sharper increase in unmet demand for working hours by men. Prior to the pandemic, under-employment was consistently higher for women than men. In the 12 months prior to the pandemic, under-employment for women was an average of 10.2 percent (based on monthly data) compared to 6.7 percent for men, or 3.5 points higher on average. During the First Wave, female under-employment remained higher, peaking at 15.9 percent, 2.9 points higher than male under-employment, in April 2020.

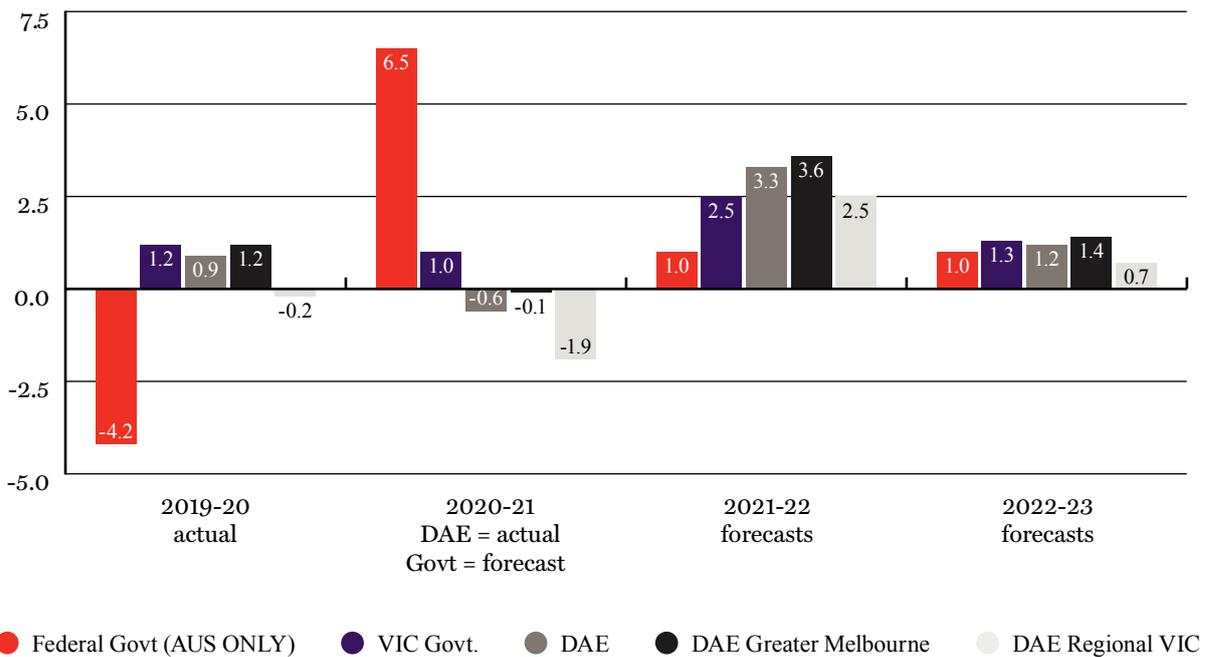
However, male under-employment increased sharply during the Second Wave, peaking at 15.2 percent in September 2020, to rise briefly above female under-employment. This meant that male under-employment was more than double pre-pandemic norms during the height of the Second Wave (Figure 2.10). These trends—of relatively high unemployment for women but relatively high under-employment for men—reflect, at least in part, the greater exposure of women to employment in sectors which shed the most jobs. In contrast, men were more likely to be employed in sectors where jobs were retained through the JobKeeper scheme and related fiscal measures.

FIGURE 2.10 UNDER-EMPLOYMENT RATE - WOMEN AND MEN IN VIC



Source: Authors' calculations of data from ABS (2021)

FIGURE 2.11 COMPARING FORECASTS FOR EMPLOYMENT GROWTH (%) (VIC)



Source: Authors' calculations from Australian Government (2021), Victorian Government (2020) and DAE data

ECONOMIC FORECASTING DURING A GLOBAL PANDEMIC

Due to the unpredictability of the pandemic's effects, the task of long-term macroeconomic forecasting—one already over-burdened with hidden assumptions—became virtually untenable during the First and Second Waves. Despite signs of recovery and hopes of a return 'normality' due to rapidly rising vaccination rates at the time of writing, considerable uncertainty remains about the domestic and international situations. This means that the feasibility of forecasting, even in the short-term, also remains fraught with problems. The problem of forecasting was aptly put in a McKinsey industry report released during the Second Wave:

In a stable economic environment, leaders may be able to make long-term forecasts with confidence, grounding policies in far-sighted knowledge. But when the economic outlook leads the [Reserve Bank] to note in May that 'The pace of recovery beyond the June quarter is especially uncertain', it makes sense to set aside a quest for a reliable long-run prediction (Armour et al., 2020: 23)

The volatility of change since this time reinforce this point significantly, including the unexpected pace of rebounding national employment over the summer of 2020/21 followed by the shock of spiralling case numbers in NSW and Victoria from June. It is evident that key Federal Government assumptions during May 2021's Budget—for example, that 'localised outbreaks of COVID-19 are assumed to occur [in 2021] but are effectively contained' (Australian Government, 2021: 36)—no longer apply. As Armour et al. (2020) imply, empirically grounded, shorter-term forecasts are more desirable in these circumstances.

As an indication of this problem, we compare forecasts from Federal and Victorian State Government Budget Papers released in May 2021—during a period of reverberating employment growth—with forecasts from more recent data during the onset of the Third Wave. At the time of writing, initial forecasts for the commencement of the 2021/22 budget cycle were only beginning to emerge.

Looking back to May, Federal Government Budget Papers predicted national employment growth of 6.5 percent for 2020/21 on the back of resurgent growth over the previous summer. In Victoria, however, employment growth was much lower for FY2020/21, partly reflecting the differential impact of the Second Wave on the state throughout 2020.

Pending the release of updated estimates from government, we looked at private data for the June Quarter 2021 from Deloitte Access Economics employment growth analysis. This data captures the beginnings of the Third Wave's impact and includes revised forecasts. It recorded a decline in employment of 0.6 percent for Victoria in 2020/21, compared to earlier forecasts in the Victorian Government Budget Papers for a 1 percent rise. It also recorded a small decline for Greater Melbourne (0.1 percent) and a larger decline for regional Victoria (1.9 percent). Partly based on this, DAE's forecasts for 2021/22 are for *higher* employment growth (i.e., a recovery) for Victoria compared to the earlier State Budget forecasts (3.3 versus 2.5 percent), with forecast growth higher still for Greater Melbourne (3.6 percent).

In short, expectations of a contraction in jobs growth due to the (ongoing) impact of the Third Wave, combined with expectations of near-future recovery due to vaccination-driven abatements in lockdown and border closures imply that aggregate employment growth will be stronger overall in 2021/22. While this forecast is plausible, the perils of

forecasting beyond 2021/22 are highlighted by the broad similarity in old and new forecasts for 2022/23. Comparative description of government and private data shows that now-outdated government forecasts are not significantly different to forecasts based on more recent data. For example, DAE's modelling for 2022/23 is for a 1.2 percent increase in employment—just 0.1 points lower than the Victorian Government's prediction during the last State Budget (Figure 2.11).

This finding further reinforces the point about macroeconomic forecasting: that, especially in current circumstances, organisations should not rely on forecasting beyond FY2021/22 as a basis for forward planning and that forecasts for 2021/22 need to be calibrated carefully against a range of data, including quantitative and qualitative data which also takes stock of meso and micro, or local, scales.

If we follow this logic by limiting forecasting to the coming FY2021/22 only, DAE forecasts suggest that future employment growth will be comprised of large recoveries in high employing sectors, including accommodation and food services (17.3 percent), construction (6.8 percent), professional, scientific and technical services (4.8 percent) and the largest-employing sector, healthcare and social assistance (3.6 percent). However, DAE forecasts for falls in manufacturing and retail trade (1.6 and 1.5 percent, respectively) (Figures 2.12 and 2.13).

A final dimension from this forecast data for 2021/22 is DAE's distinction between 'white collar' and 'blue collar' sectors. Forecasts for white collar sectors are close to growth forecasts for all employment in Victoria. DAE records a 1.4 percent increase for the last FY2020/21 and predicts 3.3 percent for FY2021/22 (Figure 2.14).

However, trends for blue collar sectors are more volatile. Employment growth in these sectors shrank by a sizeable 5.5 percent in 2020/21 and is expected to rise by 3.5 percent in 2021/22. Although we live in a service-based economy—for every blue-collar job in Victoria, there are approximately 2.5 white-collar jobs—such a sharp contraction and resurgence in blue-collar employment, including the loss of nearly 53,000 jobs for 2020/21, suggests that the social disruption of labour market 'churn' in this sector has been greater (Figure 2.15).

Trends in blue-collar job volatility were sharper in Greater Melbourne, which recorded a 5.9 percent decline for 2020/21 (Figures 2.16 and 2.17). This shows that nearly three-quarters (73 percent) of Victorian blue-collar jobs lost in the last FY were concentrated in Greater Melbourne.

FIGURE 2.12 DAE EMPLOYMENT GROWTH FORECASTS BY INDUSTRIES >150,000 WORKERS PRE-PANDEMIC (%) (VIC)

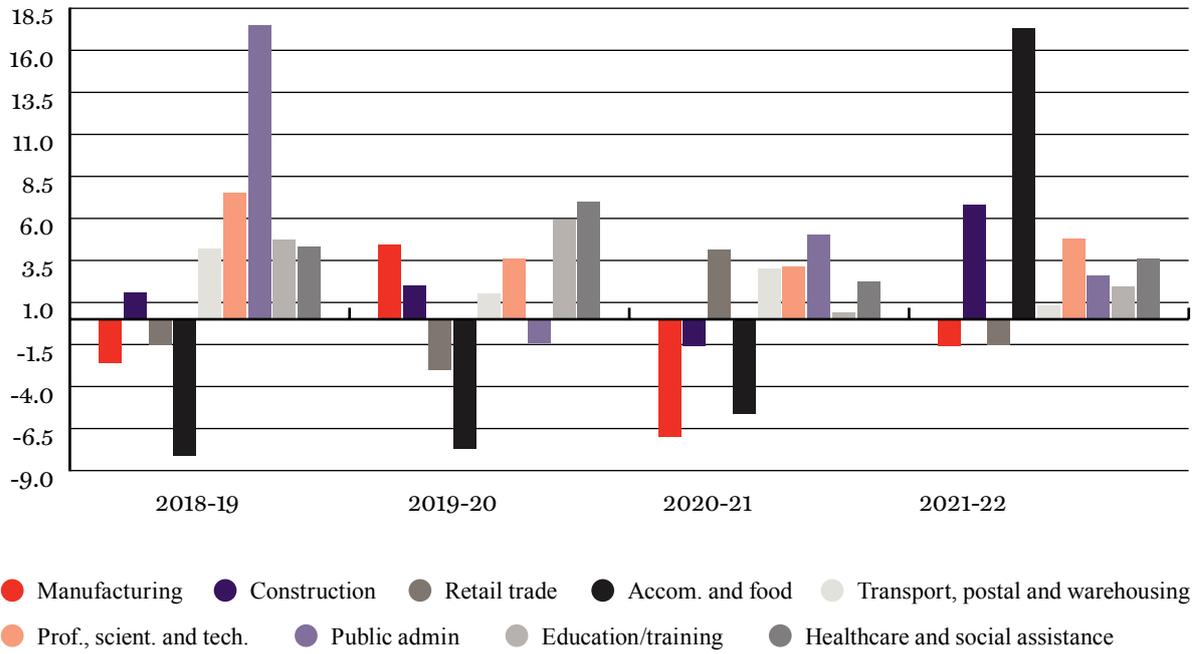


FIGURE 2.13 DAE EMPLOYMENT FORECASTS BY INDUSTRIES >150,000 WORKERS PRE-PANDEMIC (VIC)

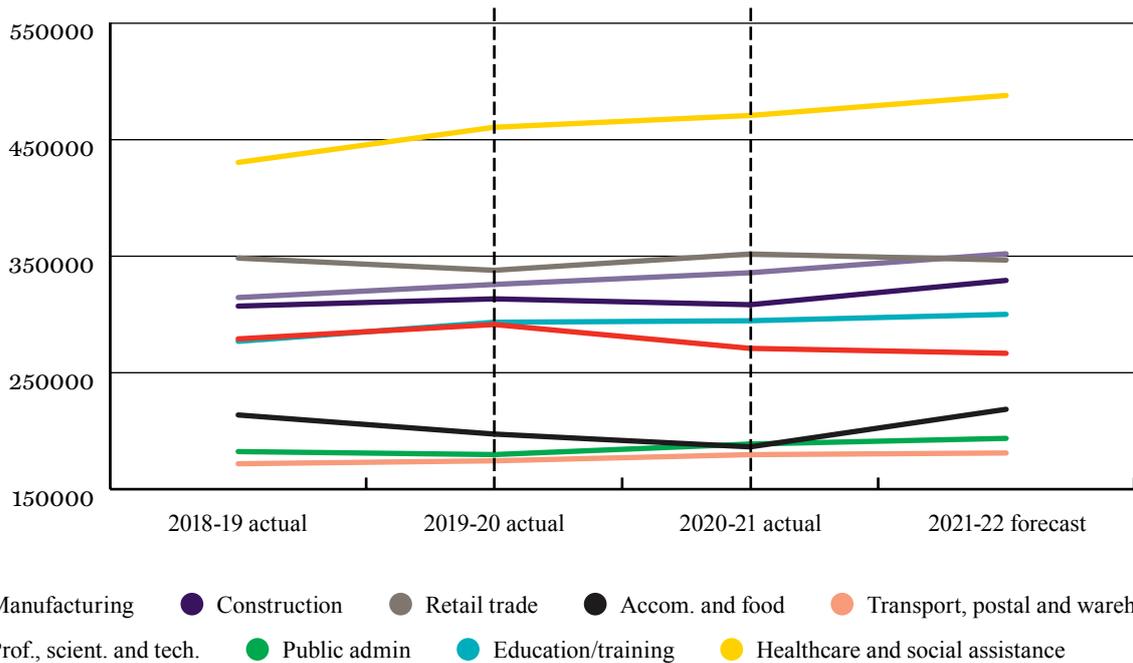


FIGURE 2.14 DAE EMPLOYMENT FORECASTS FOR 'WHITE COLLAR' SECTORS (VIC)

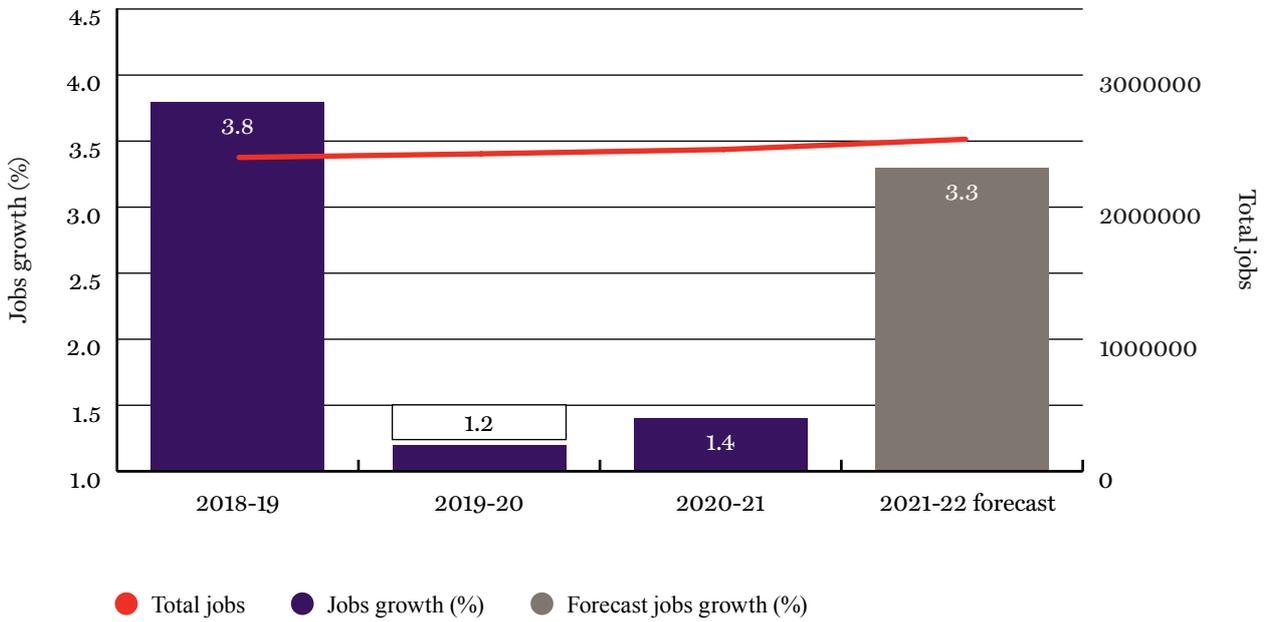


FIGURE 2.15 DAE EMPLOYMENT FORECASTS FOR 'BLUE COLLAR' SECTORS (VIC)

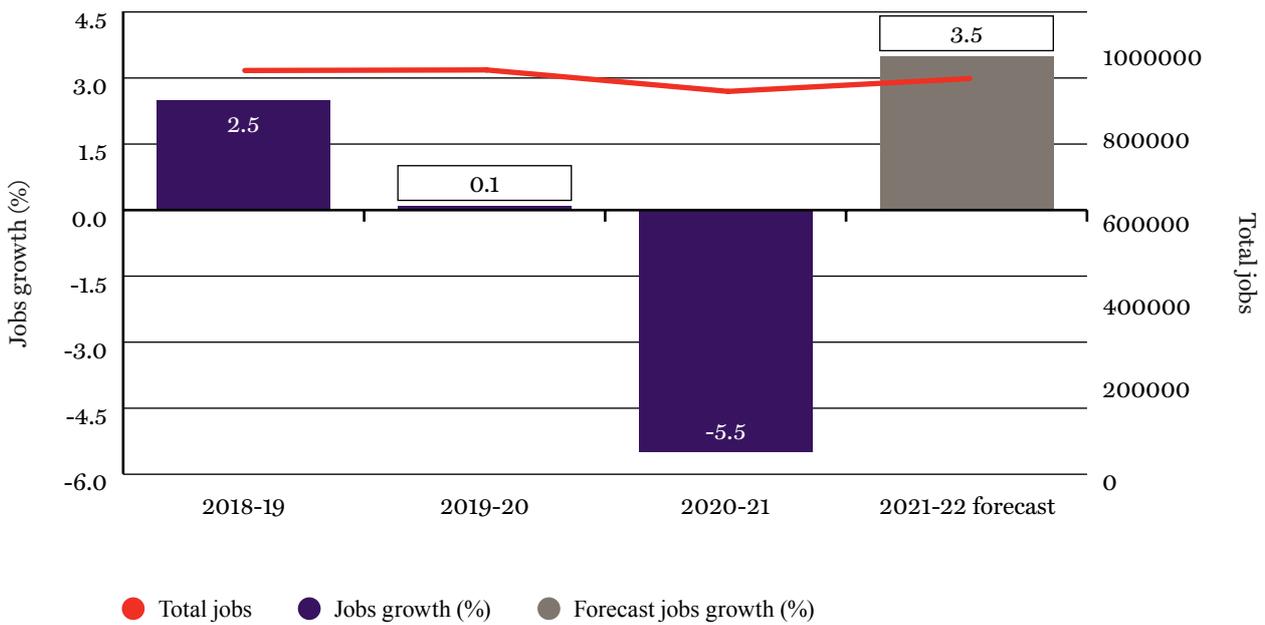


FIGURE 2.16 DAE EMPLOYMENT FORECASTS FOR 'WHITE COLLAR' SECTORS, GREATER MELBOURNE

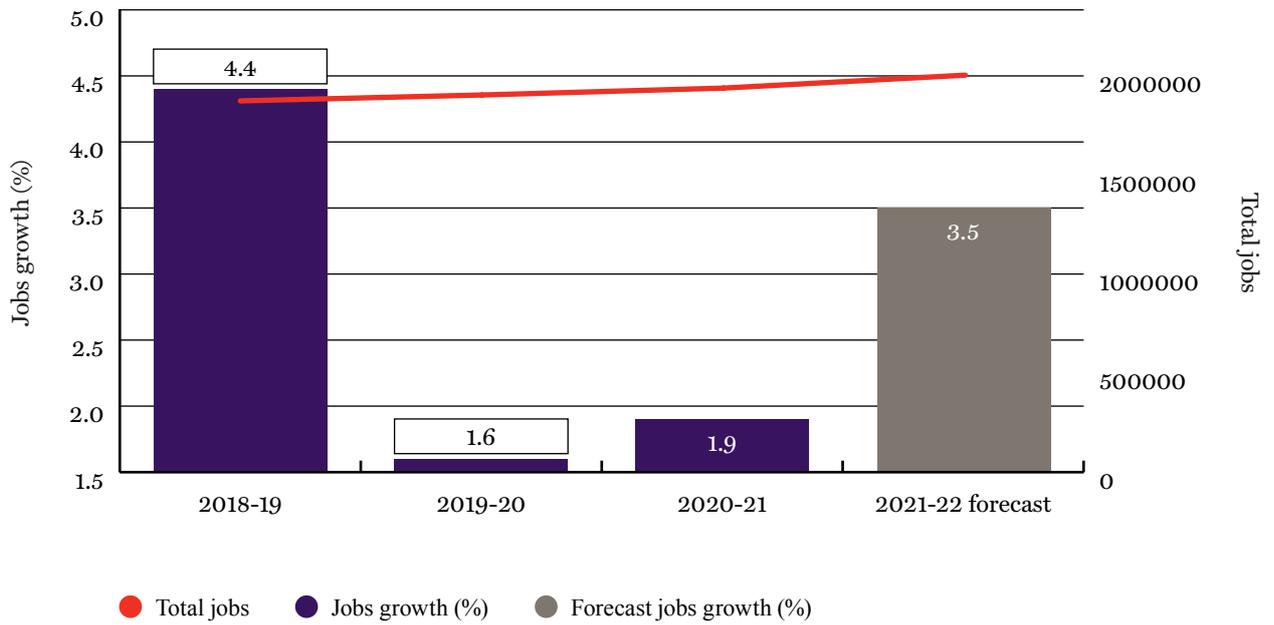
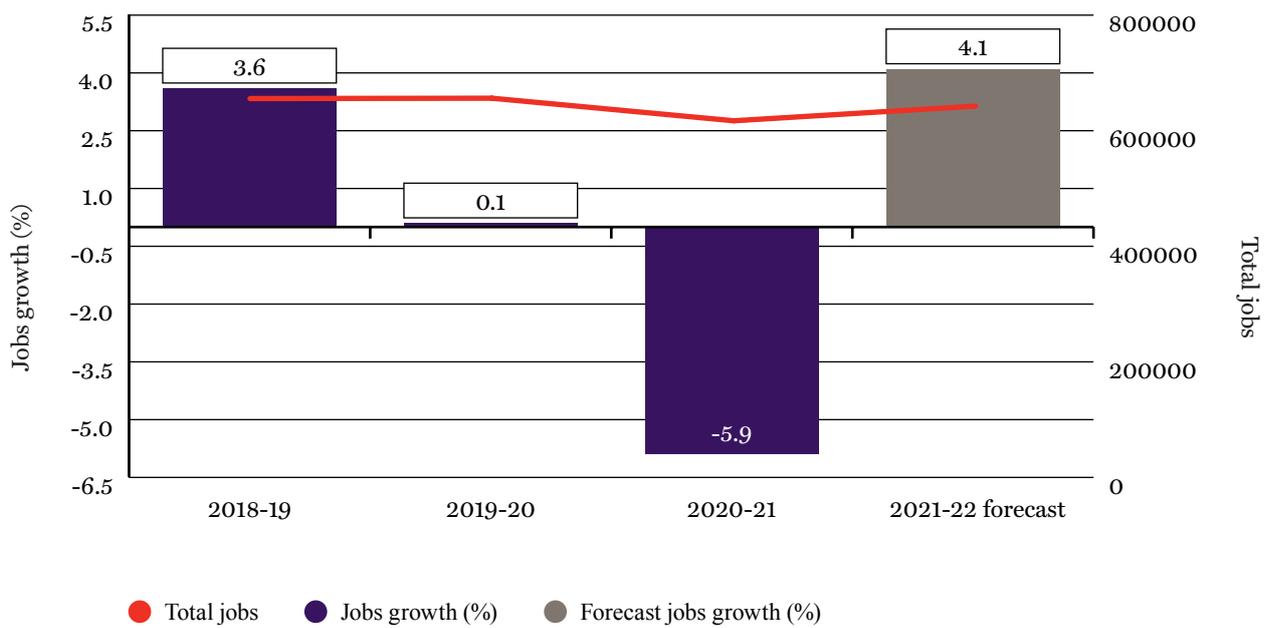


FIGURE 2.17 DAE EMPLOYMENT FORECASTS FOR 'BLUE COLLAR' SECTORS, GREATER MELBOURNE



3. The exclusion of Victoria's temporary migrants during the COVID crisis

The exclusion of millions of migrants on temporary visas from core government protections during the COVID recession is a critical feature of the present impasse (RCA, 2020; Tham, 2020). Prior to the pandemic, nearly 2.2 million people lived in Australia on temporary visas. The decision to exclude temporary visa holders had a major impact on living standards, families, social cohesion and community inclusivity (Levine et al., 2020; St Vincent de Paul, 2020).

With the exception of New Zealand citizens on Special Category Visas (SCVs), temporary visa holders were excluded from the JobKeeper scheme (Sampson and Kunz, 2020). This exclusion was at odds with policies in similarly affluent nations such as Canada, Ireland, New Zealand and the UK where temporary migrants were included, albeit differentially, in protective policies.

Australia, by contrast, responded to the crisis by telling temporary migrants to return to their home countries. Of course, many did; but many others were left in limbo and effectively ignored by the government.

Many organisations reported that the majority of temporary migrants seeking emergency relief were on student visas (Sampson and Kunz, 2020). A survey of more than 8,000 temporary visa holders—of which 83 percent were students—found that most could not return home due to border closures, the cessation of flights or insufficient funds. Students who stayed were especially fearful of forfeiting the substantial investment made in their education by being unable to return to Australia in the future. Over half of these workers (54 percent) lost jobs during the First Wave, rising to 57 percent among students. A further 29 percent lost hours or shifts. Nearly a third (32 percent) reported not being able to meet essential needs including meals, utilities or medical care (Berg and Farbenblum, 2020).

In this survey, more than 2 in 5 participants feared becoming homeless; 1 in 7 were homeless at least once during the First and Second Waves. A third had sought emergency relief, including 37 percent of international students. Among these participants, a third sought help from an education provider or from a friend or relative in Australia, although support was not always forthcoming. The most affected jobs were concentrated in the hospitality or food and beverage sectors; for example, job loss among waiters, kitchen hands, and food servers was 67 percent. Jobs in commercial cleaning were also severely affected. Migrants from South Asia were disproportionately affected overall (Berg and Farbenblum, 2020).

As well as historically vulnerable groups such as asylum seekers and refugees, the crisis worsened life considerably for new groups of migrants including recent arrivals and international students. Many from these groups were caught in a seemingly impossible position—unable to exercise

the choice of returning to their countries of origins due to international border closures or perilous public health conditions overseas, unable to access income from paid work due to lockdown measures and layoffs in sectors most dependent upon migrants, and unable to access income from public welfare transfers due to their exclusion from the JobKeeper subsidy or the JobSeeker payment.

In short, these workers were *forced into idleness in economic terms, forced into immobility in spatial terms, and forced into immiseration* and, often, *impoverishment in financial terms*. The result of these combined forces was a sense of desperation that drove many migrant workers to seek assistance from social service providers for the first time. The proportion of temporary visa holders experiencing financial insecurity and housing insecurity rose sharply during the course of 2020 (Berg and Farbenblum, 2020; Sampson and Kunz, 2020).

The failure of the Federal Government to protect temporary visa holders placed additional pressure on state governments to assist those experiencing vulnerability. In Victoria, some relief was provided for around 40,000 international students under a \$45 million International Student Emergency Relief Fund, although eligibility required a co-contribution from higher education providers. Furthermore, migrants were eligible to access up to \$2,000 in circumstances of rental hardship as part of the \$80 million Coronavirus Rent Relief Grant scheme, although this required a bond formally lodged with the Residential Tenancy Bond Authority (RTBA). Eligibility was also available for \$1,500 hardship payments for COVID-positive workers in self-isolation and \$300 for those self-isolating while awaiting test results (Sampson and Kunz, 2020).

Numerous service providers reported the shift in the composition of clients during the First and Second Waves, including the rising number of international students. ACOSS' Australian Community Sector Survey in July 2020 found that over three-quarters (77 percent) of service providers had reported a change in clientele. For providers of migrant and multicultural services, this figure rose to 94 percent (Cortis and Blaxland, 2020).

In Victoria, Federal Department of Social Security (DSS) funded emergency relief disproportionately assisted international students. Of the 7,348 people assisted across 4,850 households to 31 July 2020, 59.2 percent were on student visas and a further 17.3 and 12.2 percent were on bridging visas and temporary graduate visas, respectively. Recipients of emergency relief and food aid were overwhelmingly from countries in South, Central and Southeast Asia. A third of the total were from Nepal. By the end of July 2020, emergency relief was being requested over 4,500 times per week (Sampson and Kunz, 2020: 28).

At the onset of the First Wave, Victoria had the largest share of refugees and asylum seekers on temporary visas in the country—47,417 people, or 41.4 percent of the national total. Of this, three quarters (75 percent) were applicants for Permanent Protection Visas (PPVs), 12.6 percent on Temporary Protection Visas (TPVs) or Safe Haven Enterprise Visas (SHEVs) and the remaining 12.4 percent on Bridging Visas. A report for the Refugee Council of Australia released during the Second Wave estimated that unemployment for these visa holders would more than double from 19.3 to 41.8 percent and median weekly wages would fall by \$90 per week, or 9.8 percent, leaving 93 percent to survive on sub-minimum wage incomes. On average, employment was forecast to drop by 30.5 percent. For accommodation and food services, where nearly 1 in 5 was employed prior to the pandemic, this decline was expected to be 60.5 percent (van Kooy, 2020).

THE UNEMPLOYMENT CRISIS AMONG VICTORIA'S MIGRANTS

The unequal experience of the crisis is reflected in many ways, including different unemployment rates between migrants and those born in Australia. While increasing significantly during the pandemic, unemployment for Australian-born workers in Victoria never exceeded 7 percent. Unemployment for recently arrived migrants was much higher.

For those who arrived 5–9 years ago, unemployment peaked at 11.6 percent during the Second Wave. For those who arrived in Australia less than 5 years ago, unemployment peaked at 18.3 percent in June 2020, or nearly 3 times higher than unemployment for Australian-born workers (Figure 3.1).

Average unemployment before the pandemic and during the First and Second Waves highlights this differentiated experience. In the 12 months prior to the pandemic (April 2019–March 2020), unemployment for migrants who arrived 5–9 years ago was 6.6 percent on average compared to 4.3 percent for Australian-born workers. However, unemployment for migrants arriving within the previous 5 years was 8.7 percent on average, or more than double the rate for Australian-born workers.

During the First Wave of the pandemic (April–May 2020), unemployment for these most recently arrived migrants ballooned to 15.5 percent and, for migrants that arrived 5–9 years ago, to 9.6 percent, compared to 5.8 for Australian-born workers. During the Second Wave (June–November 2020), these rates were 14.8, 10.3 and 6.2 percent, respectively.

Thus, the gap in unemployment rates between Australian-born and migrant workers significantly widened during the pandemic (Figure 3.1). This data also reflects the concentration of recently arrived workers and temporary visa workers in jobs which were most exposed to the effects of the crisis or those most easily shed by employers. Surging migrant unemployment reflected the exclusion of these workers from the JobKeeper scheme.

To understand the scale of the crisis in Victoria, we can approximate the proportion of people in Victoria's workforce who were victims of government exclusion. Shortly before the pandemic (February 2020), a third of Victoria's 3.67 million-strong labour force was comprised of workers born overseas. Almost 1 in every 8 workers (12 percent) had arrived less than 10 years ago and almost 1 in every 18 (5.7 percent) had arrived within the last 5 years (Figure 3.2). Among workers who arrived 5–9 years ago, the largest share came

from countries in South and Central Asia (29.6 percent), followed by Southeast Asia (15.9 percent) and Northeast Asia (15.5 percent) (Figure 3.3). Among those arriving within the previous 5 years, these regions were also dominant, with 46.5, 14.6 and 10.2 percent of the total share, respectively (Figure 3.4).

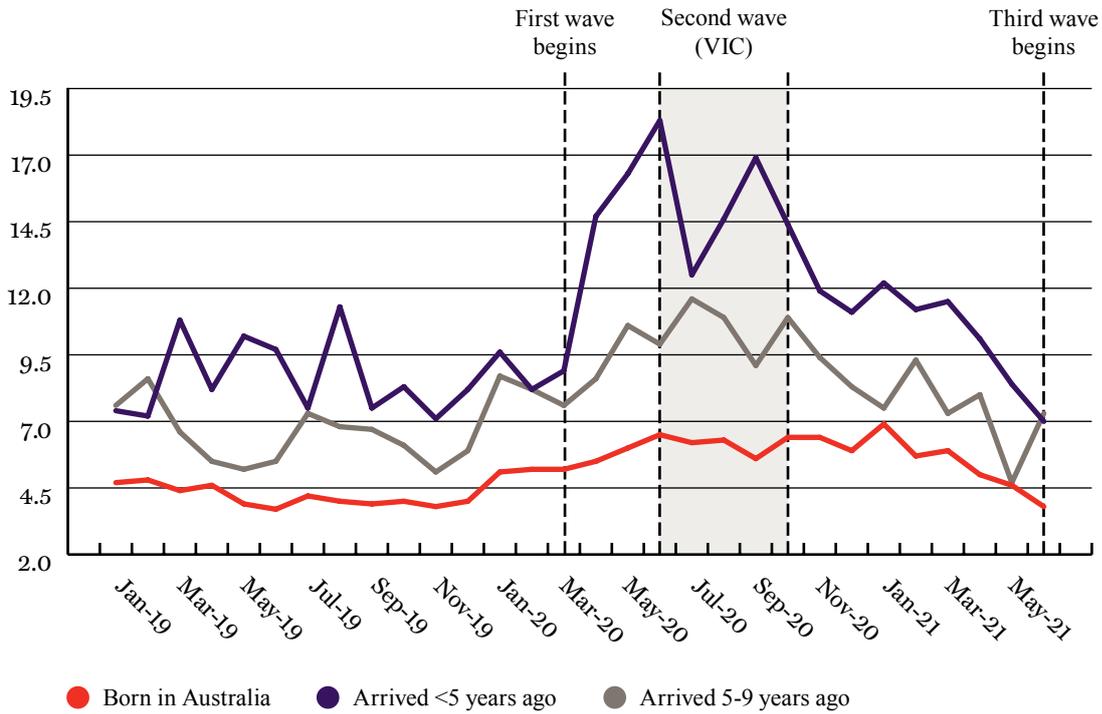
Based on these shares, Figures 3.5 and 3.6 chart changing unemployment among recent arrivals from these three regions of origin. Among migrants who arrived 5–9 years ago, those from countries in Northeast Asia experienced unemployment as high as 22.3 percent during the peak of Second Wave, over 3.5 times higher than unemployment for Australian-born workers. However, unemployment among migrants from South/Central and Southeast Asia was also very high during this period (Figure 3.5).

Among migrants who arrived within the previous 5 years, those from countries in South and Central Asia experienced unemployment as high as 24 percent during the First Wave, a remarkable 4 times higher than official unemployment for Australian-born workers. For these workers, unemployment did not drop below 14 percent until after the Second Wave had subsided in Victoria. Workers from countries in Southeast Asia did not experience a peak in unemployment until January 2021, during a period of supposedly resurgent economic recovery (Figure 3.6).

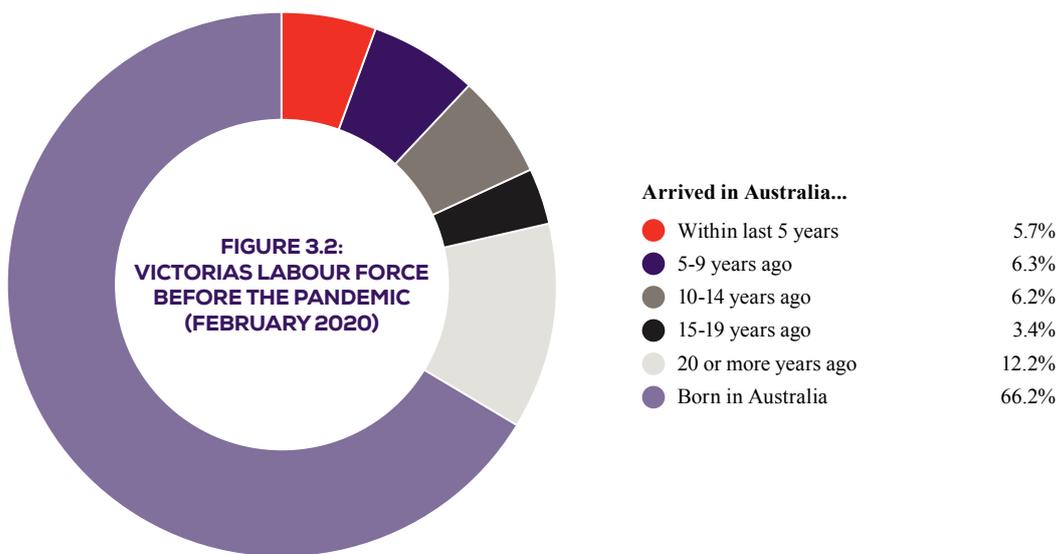
The finding that unemployment remained relatively high for recently arrived migrants can be shown more clearly by comparing average monthly employment for key periods before, during and after the First and Second Waves. Like the findings above, Figure 3.7 demonstrates that unemployment rose dramatically for migrant workers during the First and Second Waves, especially for workers who arrived within the previous 5 years but also for workers who arrived 5–9 years ago. Since the end of the Second Wave, however, the percentage point 'gap' between Australian born and foreign-born workers has persisted at higher levels than prior to the pandemic.

For instance, the gap between unemployment among the most recent arrivals from South/Central Asia and Australian-born workers more than tripled during the First Wave, rising from 4.3 to 13.9 points. But this gap persisted at 5.4 points during the recovery period, or 1.1 points higher than during pre-pandemic era. Similarly, unemployment along the most recent arrivals from Southeast Asia during the recovery period persisted at 7.2 points higher on average than Australian-born workers compared to 5.8 during the pre-pandemic era—an increase of 1.4 points on average.

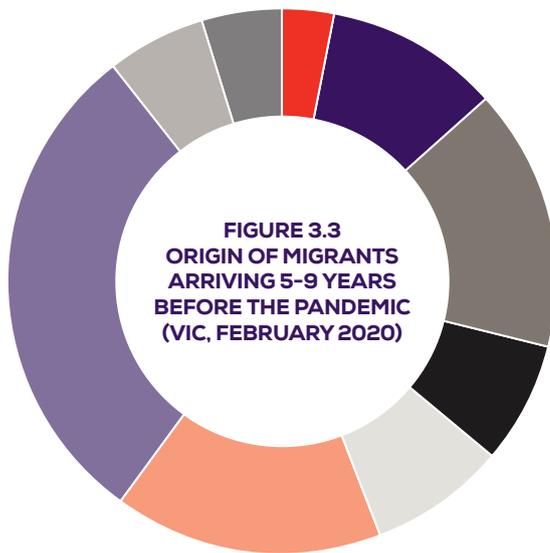
FIGURE 3.1 UNEMPLOYMENT RATE (%) VIC - AUSTRALIAN-BORN AND OVERSEAS-BORN



Source: Authors' calculations of data from ABS (2021)

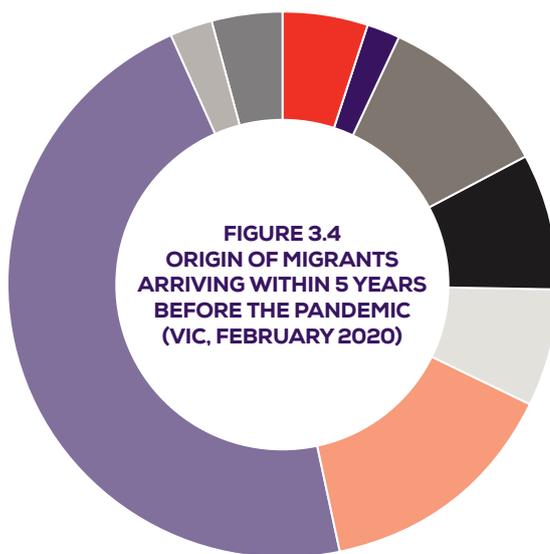


Source: Authors' calculations of data from ABS (2021)



Origin...	Percentage
Americas	3.2%
North Africa and Middle East	10.4%
North-East Asia	15.5%
North-West Europe	7.1%
Oceania	8.0%
South-East Asia	15.9%
South and Central Asia	29.6%
Southern and Eastern Europe	5.8%
Sub-Saharan Africa	4.5%

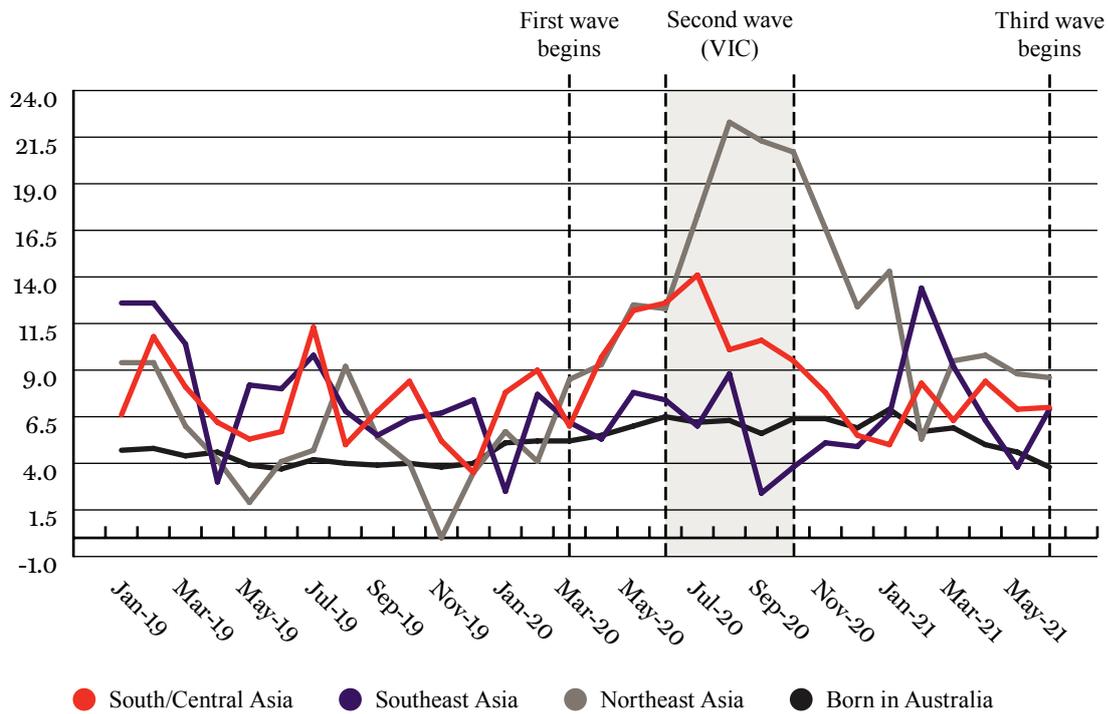
Source: Authors' calculations of data from ABS (2021)



Origin...	Percentage
Americas	5.0%
North Africa and Middle East	2.2%
North-East Asia	10.2%
North-West Europe	7.9%
Oceania	7.0%
South-East Asia	14.6%
South and Central Asia	46.5%
Southern and Eastern Europe	2.6%
Sub-Saharan Africa	4.0%

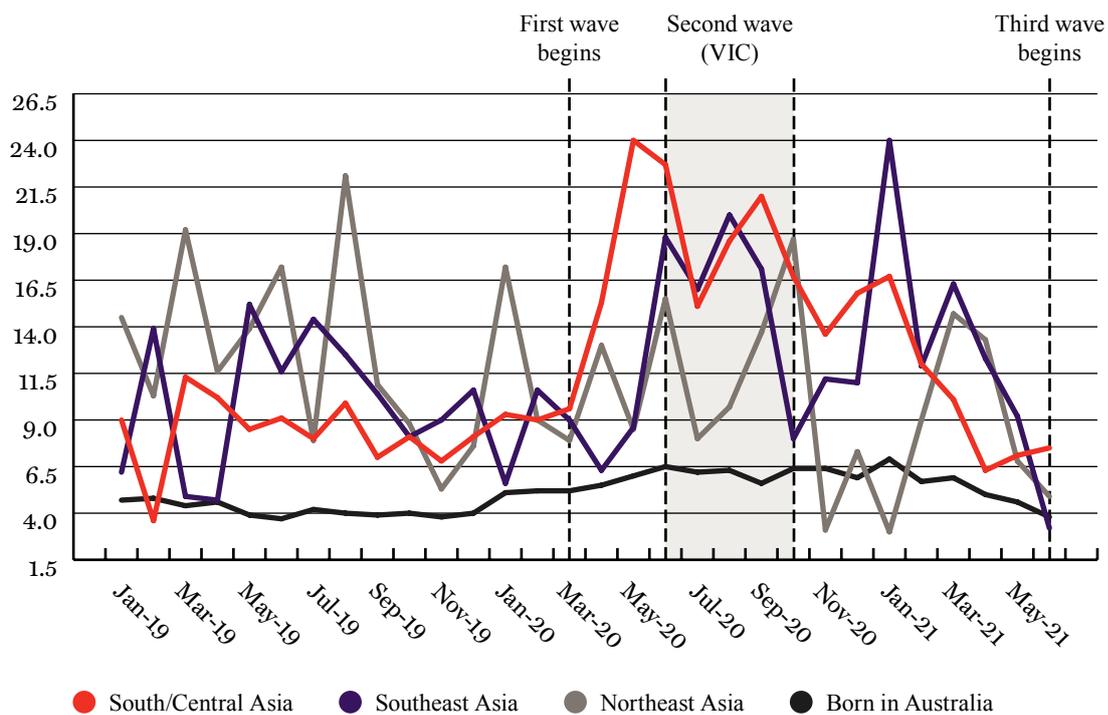
Source: Authors' calculations of data from ABS (2021)

FIGURE 3.5 UNEMPLOYMENT RATE (%) VIC - IMMIGRANTS ARRIVED 5-9 YEARS AGO BY SELECT WORLD REGION OF ORIGIN



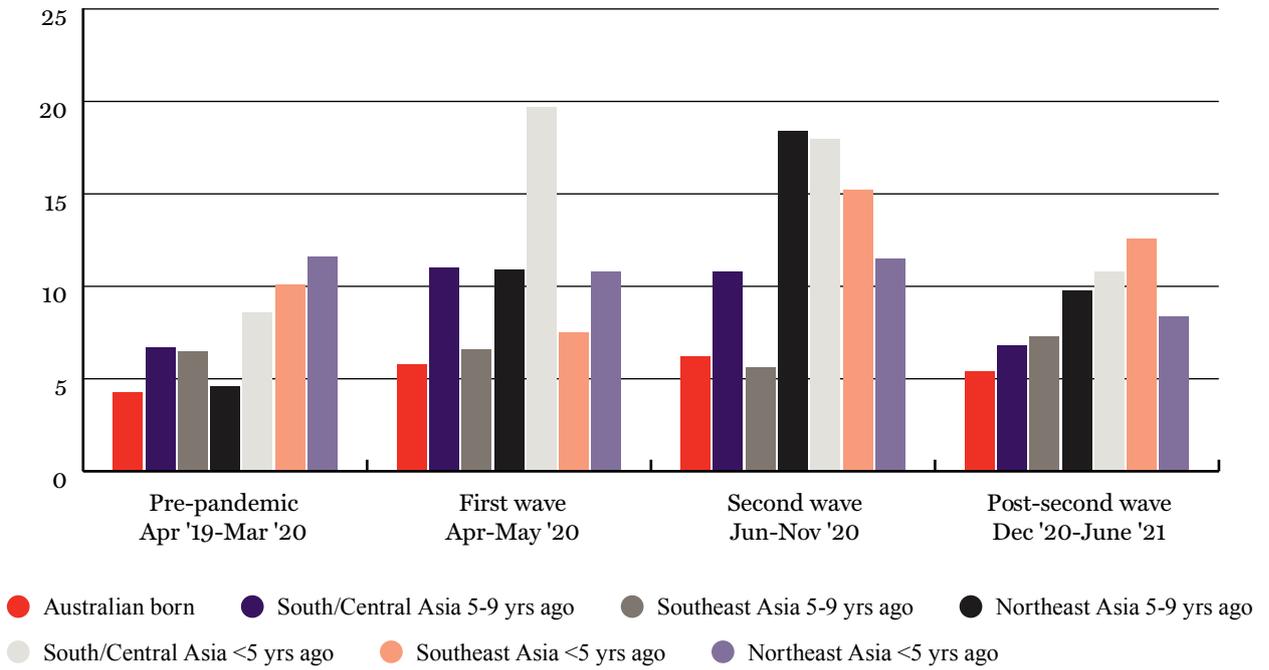
Source: Authors' calculations of data from ABS (2021)

FIGURE 3.6 UNEMPLOYMENT RATE (%) VIC - IMMIGRANTS ARRIVED WITHIN LAST 5 YEARS BY SELECT WORLD REGION OF ORIGIN



Source: Authors' calculations of data from ABS (2021)

FIGURE 3.7 UNEMPLOYMENT RATE (%) OF MIGRANTS REGIONAL ORIGIN AND PERIOD OF ARRIVAL, MONTHLY AVERAGES, VIC



Source: Authors' calculations of data from ABS (2021)

4. A failed 'recovery'? Why jobseekers experiencing the most disadvantage were worse-off pre-third wave than pre-first wave

A key plotline in the story of COVID in Australia so far is the Federal Government's decision to alleviate working poverty during the depths of the crisis in 2020, only to return to the terrible inadequacies of pre-COVID welfare policy in late 2020 and early 2021. JobSeeker is a case in point. From 1991 until early 2020, Australia's primary unemployment benefit was the Newstart Allowance. Prior to the COVID crisis, the Newstart rate was \$559 per fortnight for single people without children.

In 2018, research found that, while average weekly earnings had increased in real terms, Newstart had not risen in line with national living standards over the preceding 25 years (DAE, 2018). Prior to the COVID-19 crisis, the Newstart rate for single people had fallen in relative terms from around 90 percent of the Age Pension to around 60 per cent (BCA, 2020: 20). From 20 March 2020, the Newstart Allowance was renamed the JobSeeker Payment. The fortnightly rate for single people with no children was set at \$565.70 per fortnight.

From 27 April 2021, JobSeeker was augmented by the Coronavirus Supplement. Initially the supplement was \$550 per fortnight, which effectively doubled the JobSeeker Payment. Research has found that most JobSeeker recipients used additional income from the Coronavirus Supplement to meet basic needs and improve household financial security. This had the effect of *improving* labour market participation as well as quality-of-life (Klein et al., 2021). According to the Australian Community Sector Survey in July 2020, 83 percent of social service providers reported a positive impact from JobKeeper on clients and communities; the corresponding figure for the Coronavirus Supplement was 81 percent (Cortis and Blaxland, 2020).

From 25 September 2020 to 21 December 2020, the Supplement was reduced to \$250 per fortnight. It was then paid at a rate of \$150 per fortnight from 1 January 2021 to 31 March 2021, at which point the policy ended. The decision to end these schemes, including the decision to return JobSeeker to a rate barely above the pre-crisis level, was the source of dismay among social service providers (Lourensz, 2021).

Similar changes occurred for JobSeeker mutual obligation requirements and for other payment categories. Mutual obligations for JobSeeker were suspended in March 2020. However, from 4 August 2020, these requirements were gradually reintroduced. Initially, JobSeeker recipients were required to accept any suitable work and undertake 4 job searches per month (DESE, 2021). From July 2021, the job seeking requirement was increased to 20 job searches per month (DESE, 2021). However, mutual obligations suspensions have been periodically reactivated in areas subject to new COVID-19 lockdowns.

For Youth Allowance, which provides income support for people aged between 16 and 21 years that are looking for work or undertaking approved activities, there were similar

shifts over time. The current Youth Allowance rate for recipients under the age of 18 with no dependent children is \$253.90 (at home rate) and an independent rate of \$462.50 (away from home). For recipients over the age of 18, the rate is \$304.60 (at home) and \$425.50 (away from home). For eligible recipients, the Coronavirus Supplement increased these rates to \$303.20 (under the age of 18 with no dependent children and at home) and \$512.50 (away from home). For recipients over the age of 18, the rate was \$354.60 (at home) and \$512.50 (away from home) (Services Australia, 2021). Throughout the COVID-19 lockdowns of 2020-2021, mutual obligation requirements for Youth Allowance recipients looking for work were suspended.

During the Third Wave, the replacement of the 2020 emergency reforms such as JobKeeper and the Coronavirus Supplement with significantly less-comprehensive policies, such as COVID Disaster Payments, have been inadequate, particularly in terms of redressing disadvantages faced by those experiencing the most vulnerability. COVID Disaster Payments exclude people already receiving government assistance. This situation has been aptly described by ACOSS:

We... have a two-class income support response, with some who lost paid work because of lockdowns getting a \$600 per week Covid Disaster Payment because they were not getting any social security before the lockdown, and others getting half as much at \$315 per week [for the maximum rate of JobSeeker] (ACOSS, 2021a).

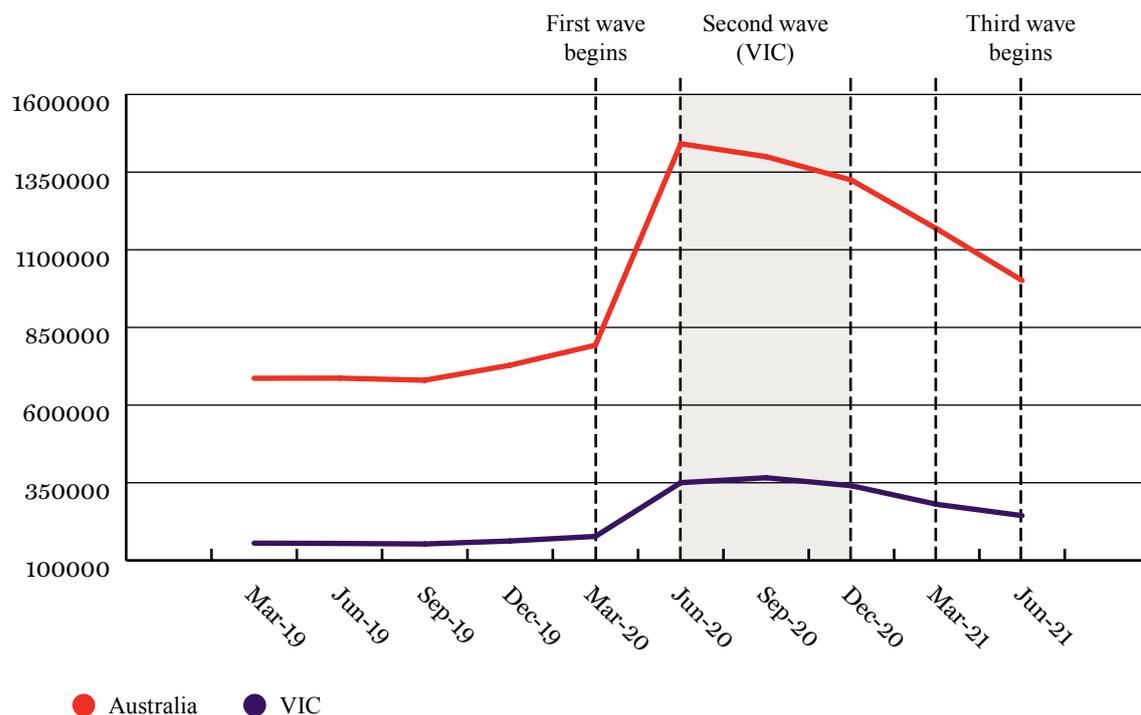
At the time of writing, even this inadequate policy was due to be withdrawn gradually in line with higher vaccination rates.

HOW MANY PEOPLE RECEIVED JOBSEEKER IN VICTORIA?

In concert with rising unemployment during the COVID recession, the number of Australian citizens and permanent residents on the re-badged JobSeeker scheme virtually doubled from less than 730,000 in December 2019 prior to the pandemic to a peak of over 1.4 million in June 2020 after the First Wave. In Victoria over the same period, the number of JobSeeker recipients more than doubled from around 162,500 to over 350,000 before peaking in September 2020, during the Second Wave, at over 366,000 (Figure 4.1). The number of people claiming Youth Allowance, both nationally and in Victoria, also increased rapidly during the first phase of the pandemic (Figure 4.2).

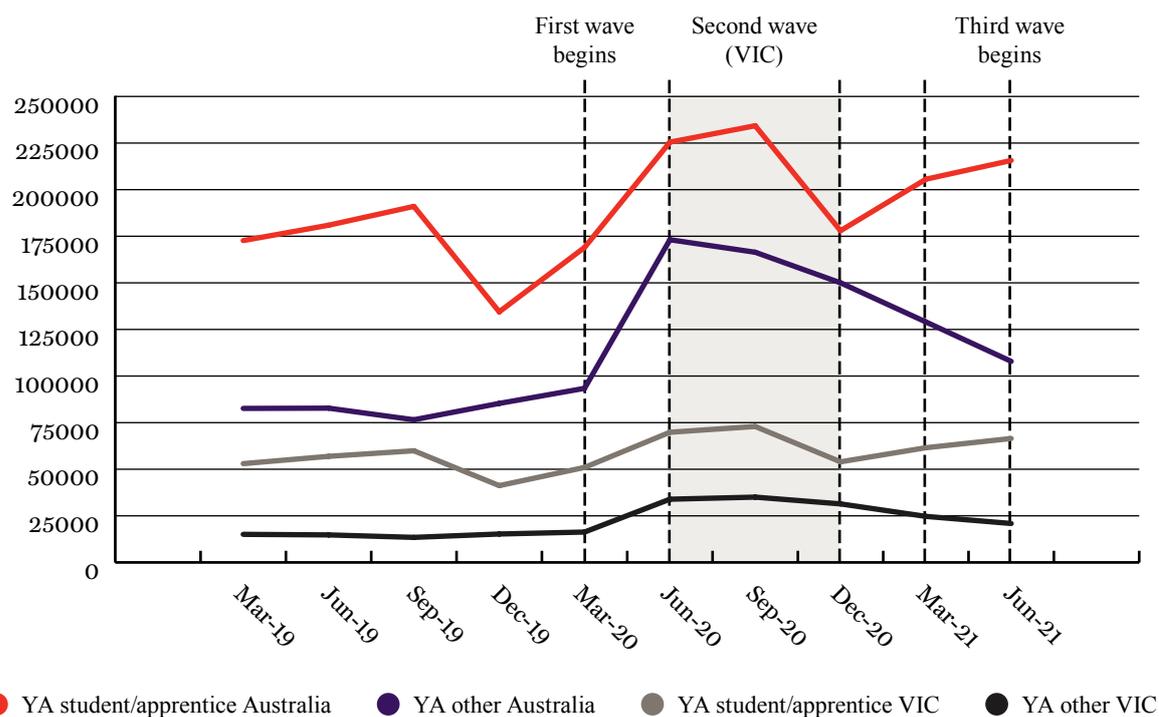
The number of recipients in Victoria tended to rise as a proportion of the national total. While the proportion of Youth Allowance (Student or Apprentice) recipients did not change significantly over time, the proportion of Youth Allowance (Other) recipients rose from 17.5 percent in March 2020 to a peak of 21.1 percent in September 2020. The proportion of JobSeeker recipients rose from 22.4 to 26.2 percent over the same period (Figure 4.3).

FIGURE 4.1 NUMBER OF PEOPLE ON UNEMPLOYMENT BENEFITS (NEWSTART/JOBSEEKER)



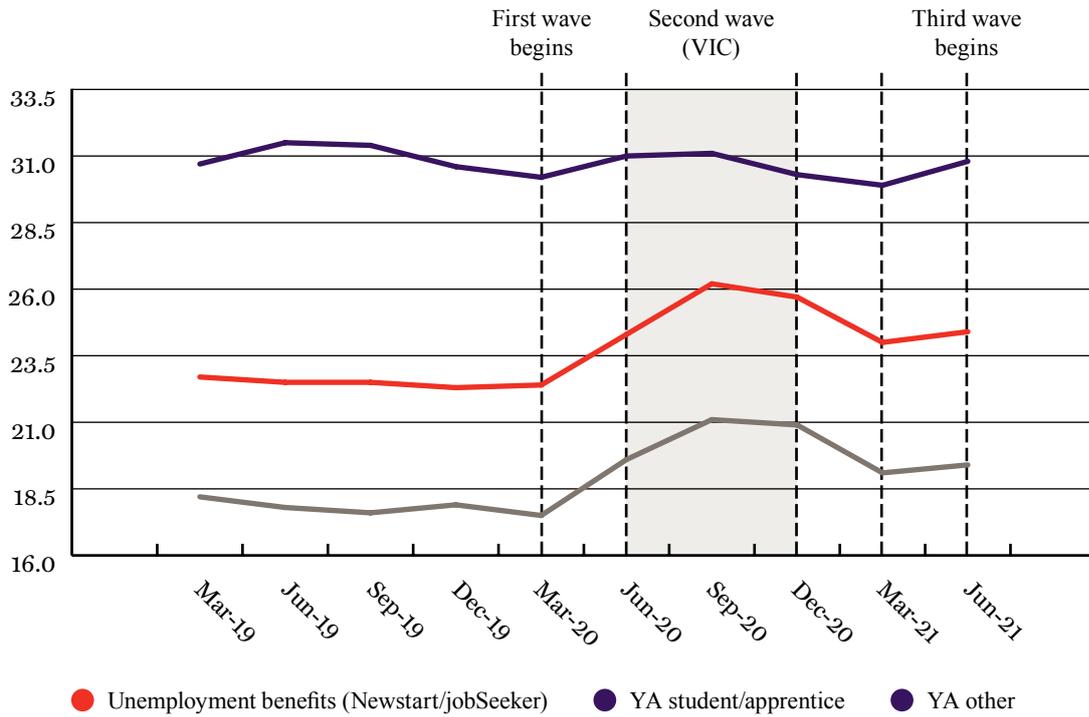
Source: Authors' calculations of data from Australian Government (2021a)

FIGURE 4.2 NUMBER OF PEOPLE ON YOUTH ALLOWANCE



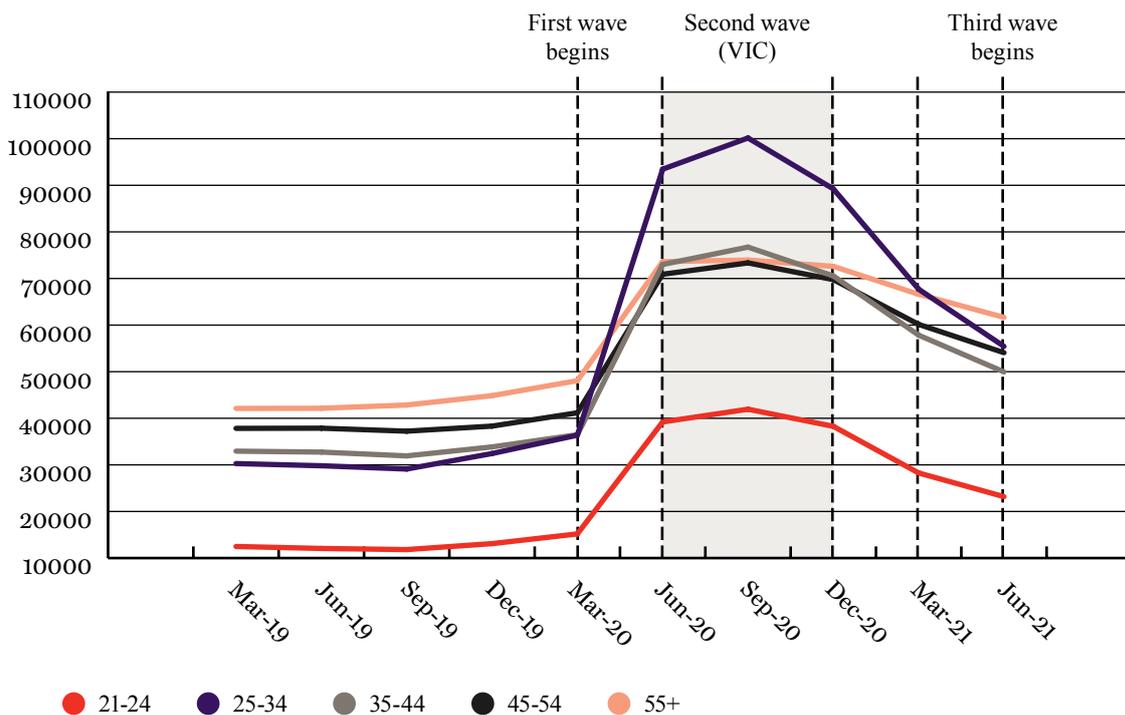
Source: Authors' calculations of data from Australian Government (2021a)

FIGURE 4.3 PERCENTAGE (%), VICTORIAN RECIPIENTS IN NATIONAL TOTALS, SELECT PAYMENT CATEGORIES



Source: Authors' calculations of data from Australian Government (2021a)

FIGURE 4.4 NUMBERS ON UNEMPLOYMENT BENEFITS (NEWSTART/JOBSEEKER) BY AGE GROUP, VIC



Source: Authors' calculations of data from Australian Government (2021a)

WHY LABOUR MARKETS DID NOT 'RECOVER' AFTER THE SECOND WAVE

After the end of the Second Wave in late 2020, the number of people receiving key categories of welfare payment declined but not to pre-pandemic levels. Despite the much-vaunted 'turbo recovery' of economic activity and employment, despite unemployment dropping below pre-pandemic levels, and despite the withdrawal of the Coronavirus Supplement in March 2021, the number of people receiving JobSeeker remained above one million by June 2021, or over 270,000 (38 percent) more than in December 2019.

In Victoria, the number of JobSeeker recipients in June 2021 was nearly 82,000 more than in December 2019, or 50 percent higher. Comparing the same period, we find that the number of people receiving Youth Allowance (Student or Apprentice) and Youth Allowance (Other) in Victoria was 61 and 37 percent higher, respectively.

A further sign of continuing problems after the Second Wave was the trajectory of JobSeeker payments based upon recipients' age. While the number of recipients of all ages rose sharply with the onset of the First Wave, the number of claimants was most striking for people in their late 20s and early 30s. Prior to the pandemic, recipients of unemployment benefits were much more likely to be older workers aged 45 or more. With the onset of the COVID recession, workers in the 25-34 age group moved from being the second-smallest group of recipients in Victoria to the largest group. The number of claimants in this category rose astonishingly quickly, more than tripling from less than 32,500 in December 2019 to over 100,000 in September 2020 (Figure 4.4).

The shifting age composition of JobSeeker recipients is shown in percentage terms in Figure 4.5. While a smaller group overall, the number of recipients in the youngest group (21-24) also more than tripled over the same period.

Even after months of apparent economic recovery, the number of young workers on JobSeeker remain well above pre-pandemic levels. For example, there was 71 percent more workers in the 25-34 age group on JobSeeker in June 2021 than in December 2019. A lasting impact of the crisis of 2020 was that this age cohort was now the second largest JobSeeker recipient group.

VICTORIA'S PERSISTENTLY HIGH JOBACTIVE CASELOAD

The number of people registered with jobactive providers is a further indication that the 'recovery' of 2020/21 left many victims of the economic crisis in an ongoing state of vulnerability. Figure 4.6 shows that jobactive caseload numbers in Victoria increased by over 2.5 times during the First Wave and 2.8 times for Greater Melbourne. However, caseload numbers remained well above pre-pandemic levels by June 2021, long after the end of the Second Wave but before the onset of the Third Wave and the resumption of lockdowns—93 percent higher, or nearly double that of December 2019. For the same period, caseload numbers for Greater Melbourne persisted at more than double pre-pandemic levels.

Similar findings emerge for some of the most vulnerable jobactive clients. For example, while the number of female clients declined after the end of the Second Wave and re-opening of Victoria's economy, the number of women in Greater Melbourne registered with jobactive providers in June 2021 was 94.2 percent higher, or nearly double,

the pre-pandemic level of December 2019 (Figure 4.7). Earlier research has already established that women were disproportionately affected by the withdrawal of the Coronavirus Supplement, including many single parents (ACOSS, 2021).

In addition, the number of Aboriginal and Torres Strait Islander clients for Greater Melbourne was around two thirds (66.8 percent) higher in June 2021 compared to the pre-pandemic level while the number of people registered as refugees was 50.4 percent higher for the same period (Figure 4.7).

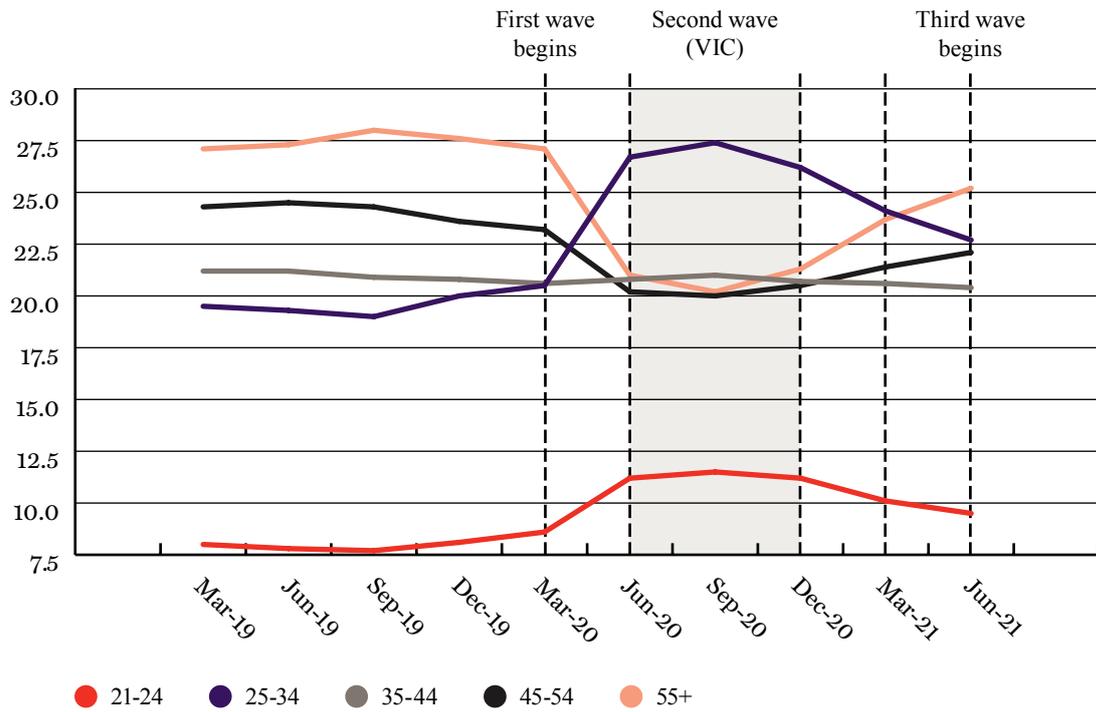
Prior to the pandemic, refugees represented 1 in 10 jobactive clients in Melbourne (11.1 percent). Although this percentage declined slightly during the pandemic as the jobactive system managed new demand from Australian-born workers and other migrant groups pushed into unemployment by the COVID recession, this high ongoing jobactive caseload highlights the precarious situation for refugees in the labour market.

Even in regional Victoria, where the economic impact of the Second Wave was generally less profound due to less severe lockdown restrictions and lower unemployment, caseload numbers for groups experiencing vulnerability remained well above pre-pandemic levels by mid-2021. For women, Aboriginal and Torres Strait Islander peoples and refugees, caseload numbers in June 2021 were above December 2019 numbers by 52.3, 39.8 and 12.9 percent, respectively (Figure 4.8).

These findings highlight the lasting disruption of 2020's COVID recession for the most vulnerable. Even during a period of recovery if measured in terms of economic activity and aggregate jobs growth, the large minority of people experiencing marginalisation as result of the crisis was much greater than during the pre-pandemic period.

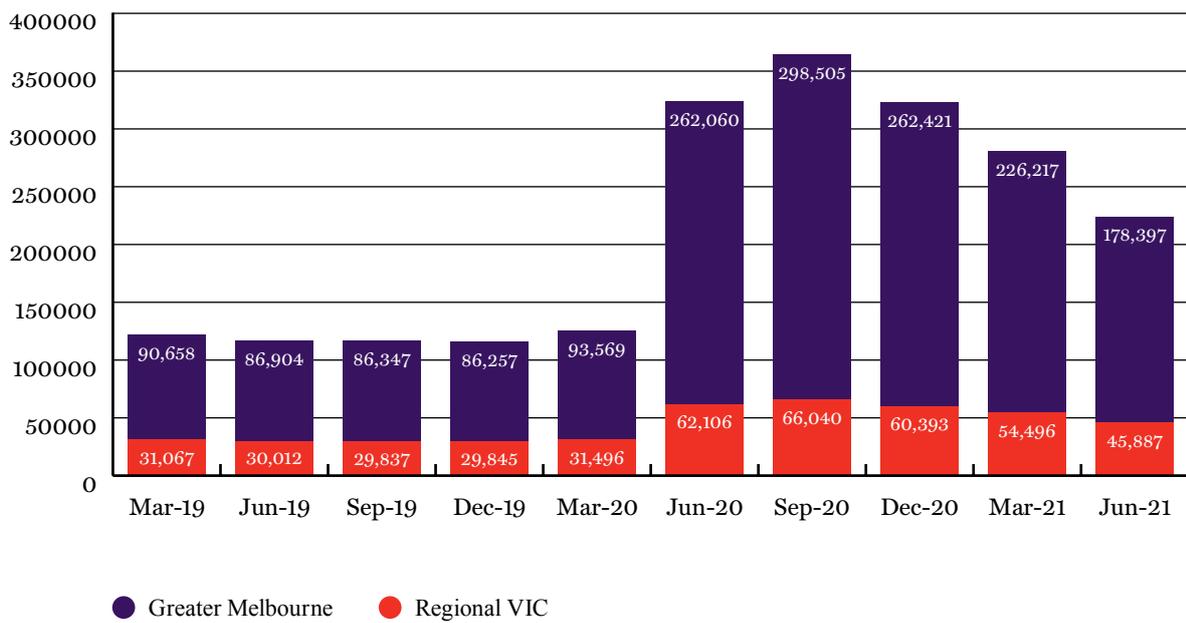
There was no 'bounce back' for people in these vulnerable groups. Our evidence suggests that most were in a weaker position, when compared to the pre-pandemic period, to deal with the challenges of the Third Wave which emerged in Victoria from July 2021 onwards and which forced millions of people and businesses back into extended lockdowns.

FIGURE 4.5 PERCENTAGE (%) OF AGE GROUPS RECEIVING UNEMPLOYMENT BENEFITS (NEWSTART/JOBSEEKER) VIC



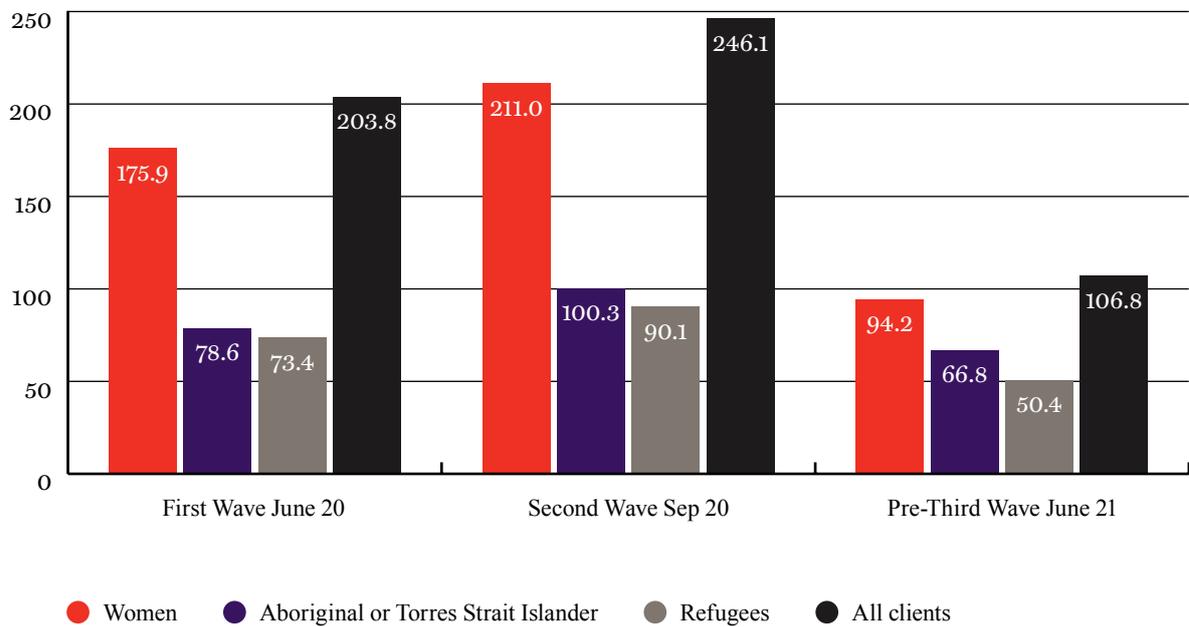
Source: Authors' calculations of data from Australian Government (2021a)

FIGURE 4.6 JOBACTIVE CASELOAD NUMBERS, VIC



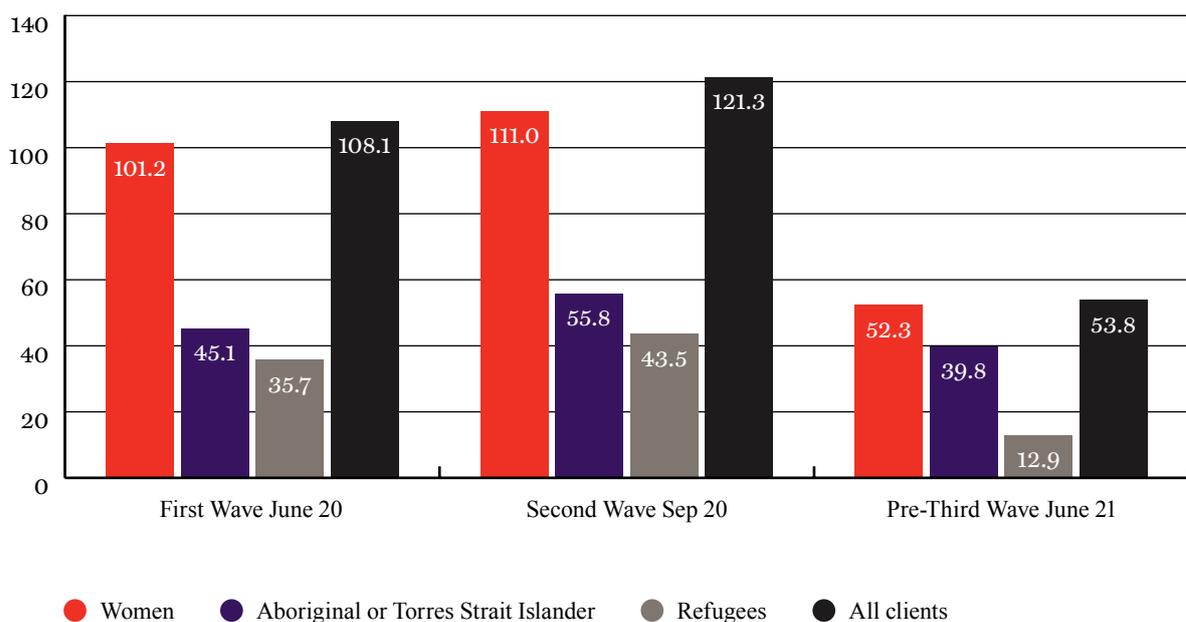
Source: Authors' calculations of data from Australian Government (2021a)

FIGURE 4.7 CHANGE (%), NUMBER, JOBACTIVE CLIENTS IN GREATER MELBOURNE VS PRE-COVID PERIOD (BASE: DEC 2019)



Source: Authors' calculations of data from Australian Government (2021a)

FIGURE 4.8 CHANGE (%), NUMBER, JOBACTIVE CLIENTS IN REGIONAL VIC VS PRE-COVID PERIOD (BASE: DEC 2019)



Source: Authors' calculations of data from Australian Government (2021a)

5. Documenting trends in service delivery during the COVID crisis

The brief for this project including an assessment of demand for social services, including assistance for people experiencing or vulnerable to homelessness, food insecurity and financial insecurity, as well as assistance for women and children experiencing family violence and its multiple impacts. The intention was to analyse changes to demand for social services over the course of the pandemic, from the pre-pandemic period before February/March 2020, to the First Wave (March-June 2020), the Second Wave in Victoria (June-October 2020), to the Inter-wave Hiatus (October 2020-June 2021), to the onset of the Third Wave from June/July 2021 onwards.

The COVID crisis exposed many people to the experience of severe financial hardship for the first time. Nearly a million people were unemployed during the first three months of the crisis, many of whom were previously protected from poverty by access to decent, well-paying employment (Janda, 2020). Millions drew down personal savings, borrowed against mortgages, or accessed superannuation savings to make ends meet.

As we have shown, circumstances were especially difficult for people whose livelihoods depended upon the worst-affected sectors of the economy, such as hospitality and tourism, the arts, or higher education (Hurley, 2020; Kelly et al., 2020). Even in other sectors such as retail trade, logistics, construction and manufacturing, workers were affected by changes to available working hours, leading to a sharpening of insecure work and under-employment. Greater uncertainty and falling financial security forced many to experiment with extra jobs, including shift work in supermarkets, short-term work in warehouses via temporary placement agencies, or low-paid gig work in the platform economy (van Barneveld et al., 2020)

According to the project brief, our analysis was to include changes in the composition of clients or cohorts seeking help, including the rise in 'first-time' users and changes in the proportion of previous users in the context of changing eligibility and entitlements to government assistance such as JobKeeper, JobSeeker and the Coronavirus Supplement, or the proportion of age groups due to the uneven impacts of the COVID recession. Furthermore, the project design included an assessment of service providers' changing capacity to meet demand and manage client needs under conditions of

intermittent or prolonged lockdown, including impacts on volunteer availability, revenue streams, and operations in terms of COVID-safety compliance burdens.

At the time of writing, data requirements for our full analysis were still emerging, including the completion and release of annual reports by key service providers for FY2020/21 as well as the compilation and availability of monthly time series for key indicators needed to enable fine-grained longitudinal analysis of change before, during and between waves of the pandemic. When completed, the intention of this analysis will be to summarise key lessons and inform responses to future shifts in public health and socio-economic scenarios, including the potential for a full or partial transition to post-lockdown social conditions, gradual changes to international border restrictions, or for periodic returns to lockdown conditions or related restrictions in response to changing coronavirus case numbers.

Nevertheless, partial conclusions can be drawn from data available at the time of writing. To maintain data confidentiality, participating organisations have been deidentified. Organisations are referred to by code in the remainder of this report.

FALLING REVENUE FROM RETAIL SALES

The organisational capacity of several service providers was affected by changes to revenue streams during the pandemic. In several cases, organisations were able to maintain services through additional income from government grants. Financial arrangements were, nevertheless, impacted significantly.

According to the Australian Community Sector Survey in July 2020, 36 percent of social service providers reported a worsening financial position in the early period of the crisis (Cortis and Blaxland, 2020). Income streams from fundraising, donations and shopfront retail sales were all affected under conditions of lockdown. Indicative data from two service providers with shopfront operations is presented in Figure 5.1. After many years of revenue growth, both organisations experienced significant declines in shopfront revenue—by 8.3 and 7 percent, respectively—during FY2019/20 as physical operations were closed for extended periods.

A DECLINING VOLUNTEER BASE

According to survey run by the Centre for Social Research at the Australian National University (ANU) for Volunteering Australia, around two thirds of volunteers in Australia stopped working during the First Wave, with particular high dropout among older volunteers as well as women (Biddle and Gray, 2020). According to the Australian Community Sector Survey in July 2020, 58 percent of social service providers reported a decline in the number of volunteers during the First Wave (Cortis and Blaxland, 2020).

The declining volunteer base intersected with the compliance burden of lockdown rules and COVID-safe operations to exacerbate the difficulties of adaptation during the depths of the crisis in 2020. This burden was particularly acute for small organisations with the most limited staffing and financial resources:

It was incredibly hard. One of [our] staff [spent], say, a third of [their] time—and that's a fulltime workload—a third of a fulltime workload just keeping an eye on COVID rules, writing out and thinking about COVID, redoing plans and permits, and just synthesising anything that [came] from government...

They would read everything, listen to [the Victorian Premier's] press conferences every morning, and then kind of work out how that related to us... It was huge because we're a small service... The administrative burden has been huge. [We're] just lucky [that we've] got such incredibly competent [staff] (Organisation H, interview with researchers).

Even organisations with larger programs were severely affected. For example, chaplaincy and counselling services for school students were significantly disrupted by the pandemic (Organisation A, interview with researchers).

In terms of impacts on the numbers of volunteers, available data does not yet reveal a clear pattern for the period since the end of the Second Wave. A positive sign is that volunteer numbers did not decline for *all* organisations in FY2019/20 despite the restrictive conditions of lockdown. Some organisations' volunteer base continued to increase during the financial year.

However, volunteer numbers were also sensitive to the type of work undertaken; for example, whether operations involving close physical proximity between people were authorised to continue during lockdowns as well as the demographic characteristics of volunteers. Older persons or those with medical conditions were more likely to withdraw from authorised work due to the higher risks of exposure to coronavirus (CSSV, 2021).

As an indication, Organisation G's volunteer base in food distribution to people experiencing vulnerability in the community fell, even though it's overall volunteer base increased (Figure 5.2). Early indications for 2021 are that volunteer numbers in food distribution fell again due to the full impact of the Second Wave, with an estimated decline of 55 percent in volunteer shifts for the calendar year, as well as an average estimated decline of 69.8 percent for Melbourne suburbs and as high as 92 percent in inner city suburbs where demand for food/meals was highest. Again, finer-grained analysis can be provided when higher-frequency time series data becomes available.

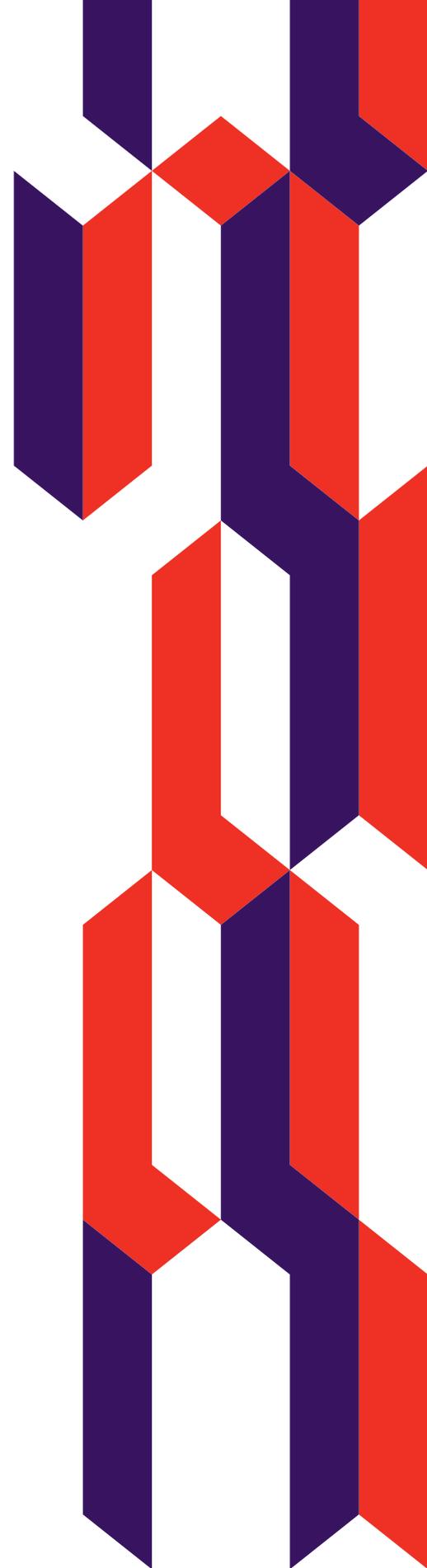


FIGURE 5.1 CHANGE IN SHOPFRONT SALES REVENUE (%)

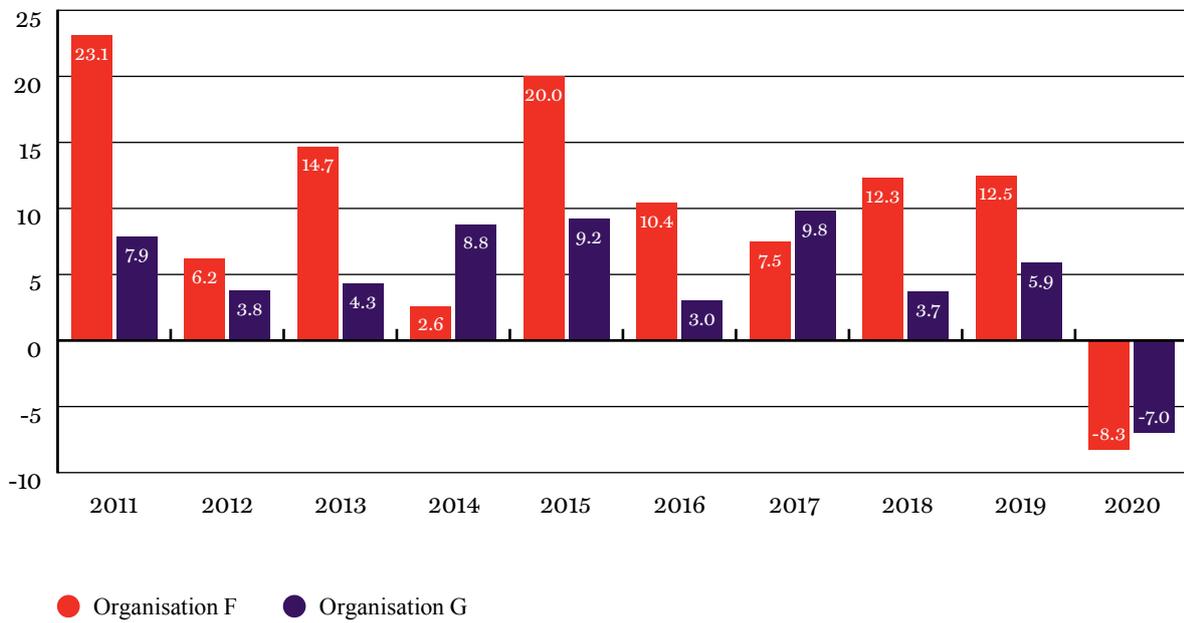
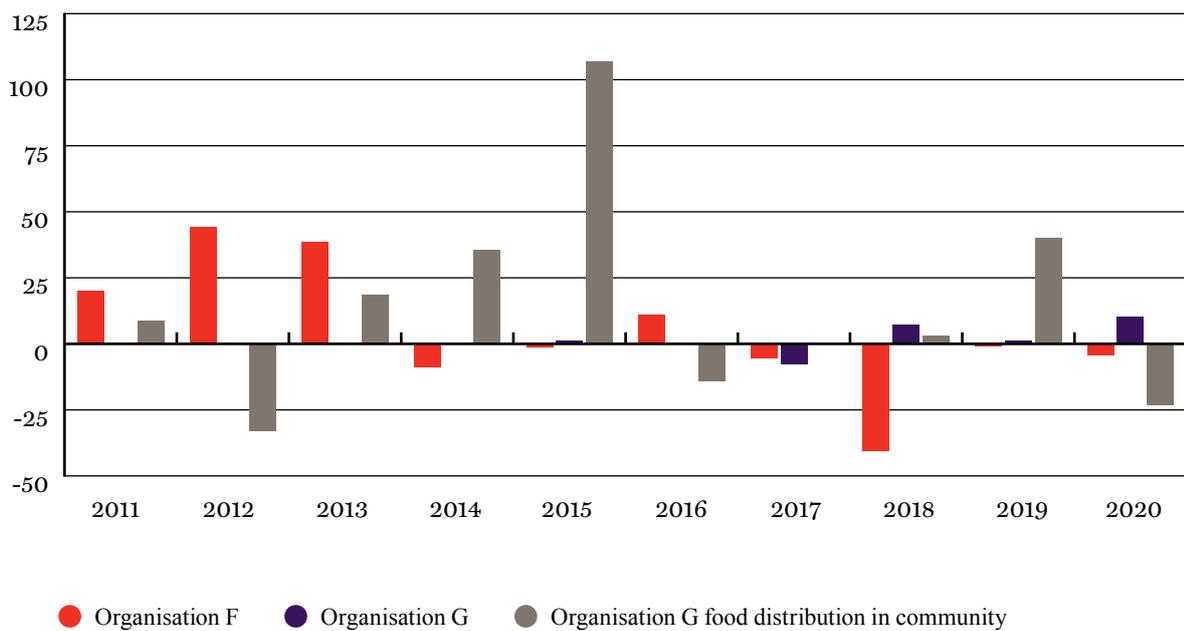


FIGURE 5.2 CHANGE IN NUMBER OF VOLUNTEERS (%)



GROWING FOOD INSECURITY AND DEMAND FOR MEALS

In terms of the number of meals served, data from the same two organisations demonstrates that a major increase in demand for food occurred in FY2019/20 compared to previous years. This is despite some qualitative evidence of withdrawal by many people experiencing homelessness who were regularly accessing services prior to the pandemic:

Some of them just withdrew back into accommodation for the whole time during COVID, and we didn't know how they were, and neither could we contact them (Organisation I, interview with researchers).

There was also evidence of a large proportion of temporary visa holders, including international students, accessing meal provisions:

That was mostly Southeast Asian and South Asian [migrants]... It was [many] international students from [countries such as] India [and] Bangladesh... with no income, no formal family structures [in Australia]. So their resilience, in terms of their social safety net, was limited (Organisation G, interview with researchers).

Despite the lockdown conditions that prevailed for much of this period and the lower volunteer base involved in food distribution, Organisations F and G experienced their largest annual increase in meal provision in the previous decade (Figure 5.3). For Organisation I, there was an increase from about 50,000 meals served in 2019 to over 130,000 in 2020.

Service providers made various COVID-safe allowances for lockdown conditions, enabling many services to continue in an adapted form. For example, Organisation G's food distribution in the community continued through changed shift times and contact free drop-off arrangements which eliminated the need for physical proximity between volunteers and clients.

Early indications are that food distribution rates for FY2020/21 have grown again, and by a significant margin. For example, Organisation G estimated that meals served would be a remarkable 119 percent higher. For Melbourne suburbs, the increase was estimated to be 136.8 percent and, for some inner-city suburbs, where the majority of meals are distributed, as high as 258.7 percent.

These data are testament to ongoing food insecurity and demand for food during the course of the pandemic and, also, the capacity of organisations with limited resources, including those managing lower volunteer levels during lockdowns, to deliver services to those in need.

FIGURE 5.3 CHANGE IN NUMBER OF MEALS SERVED (%)

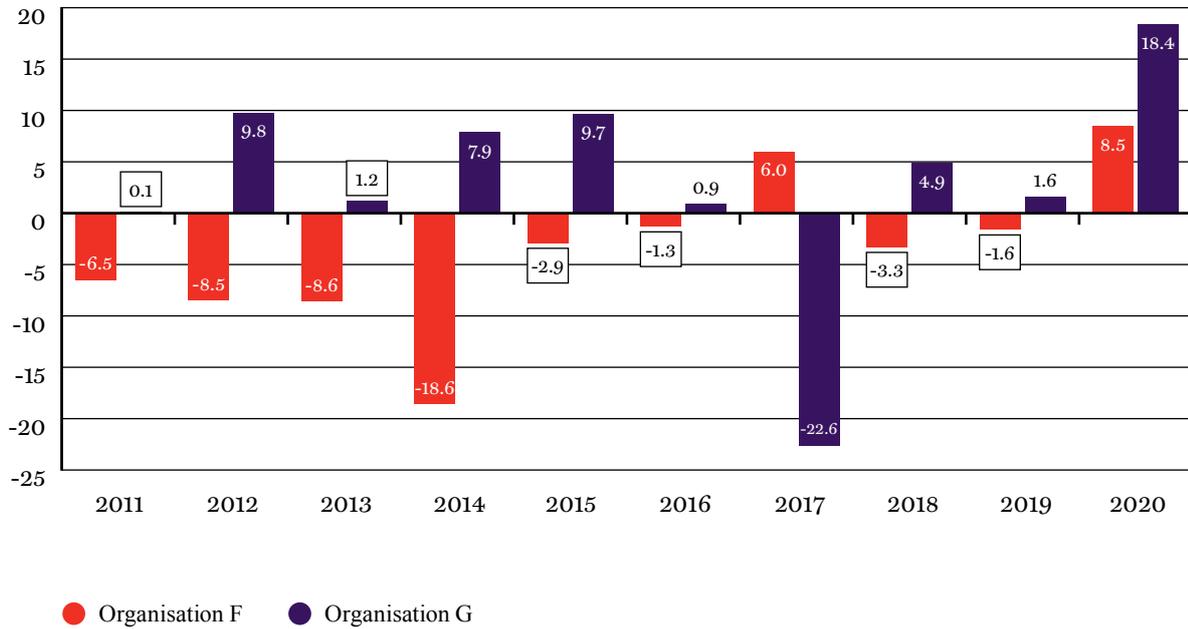
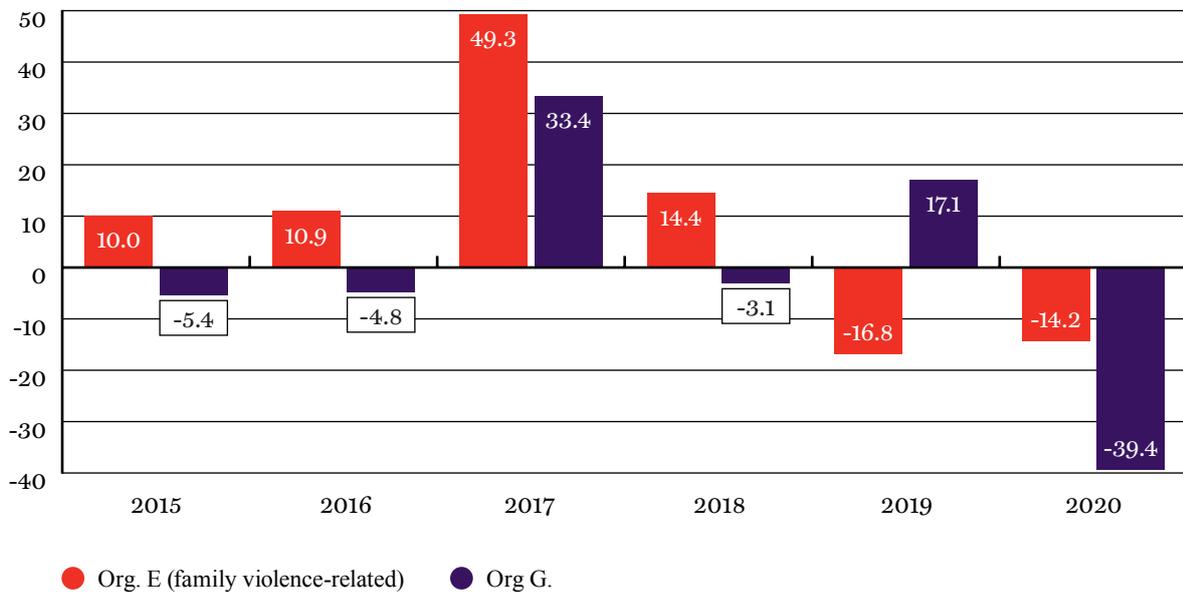


FIGURE 5.4 CHANGE IN INBOUND CALLS FOR ASSISTANCE (%)



THE CHANGING PROFILE OF PEOPLE SEEKING EMERGENCY RELIEF

In terms of inbound calls for assistance, indicative evidence for changes from FY2018/19-2019/20 is consistent with a picture of an overall decline in demand for assistance such as emergency relief or family violence (Figure 5.4). The context for this decline is the social impact of extended lockdowns during the first and early parts of the Second Wave, as well as the economic impacts of the Federal Government's emergency fiscal measures (see above). However, the *precise nature* of change was highly dependent on the type of service offered by providers, as we explain below.

For example, the documented effect of the role of the Coronavirus Supplement in mitigating the effects of unemployment, under-employment, financial hardship, and poverty is likely to be linked to a decline in the number of callers seeking emergency relief or other assistance related to material needs.

Supporting this conclusion, Organisation G reported a decline in almost all categories of material assistance for FY2019/20, including food purchases or emergency payments to cover utility bills, medical expenses or other cost-of-living expenses. There is also evidence of a decline in JobSeeker recipients calling service providers for assistance and a corresponding rise in 'zero income' callers such as international students and other temporary visa holders excluded from JobKeeper and JobSeeker.

Organisation G reported a fall in total calls from a peak of around 4,250 in February 2020 to 2,500 or less for the duration of the First and Second Waves until October 2020. Even by June 2021, total calls remained below 3,500, well below pre-pandemic levels. The fall for in-bound calls during 2020 was captured for most caller categories, including JobSeeker recipients for whom there was a fall of more than 50 percent from February to May 2020.

In stark contrast, the number of 'zero income' callers increased from around 100 callers in February 2020 to around 250 by September 2020, an increase of 2.5 times. Zero income callers were also more likely to be first-time callers. In July 2020, during the early weeks of the Second Wave, 16.8 percent of first-time callers had no income—a smaller proportion than callers on JobSeeker (25.9 percent) and Disability Support Pension (DSP) (24.6 percent). By the following month, zero income callers had become the largest group proportionally. By September 2020, zero income callers represented 30.8 percent of first callers, compared to 26.8 percent for JobSeeker recipients. By the end of the Second Wave, 'zero income' callers were the largest group, temporarily surpassing the number of JobSeeker or DSP recipients.

Indicatively, almost all of these callers were from a CALD background, with country backgrounds in Asia or the Middle East, with a high number of international students and refugees, and frequently reported English language communication difficulties. Job loss impacts and the threat or reality of homelessness were common refrains. All callers requested help with food insecurity—for example, food vouchers—and many asked for help paying for household bills.

After falling briefly at the beginning of 2021, the number of zero income callers began to rise again to nearly 200 by June 2021, prior to the onset of the Third Wave in Victoria. While the most common request for assistance remained food and groceries, the number and proportion of people asking for

assistance in purchasing clothing—for example, for everyday needs, winter warmth or for children—climbed steadily from late 2020 until June 2021.

As lockdown conditions tightened in Victoria in mid-2020, there was also a 'spike' in demand for furniture and household goods:

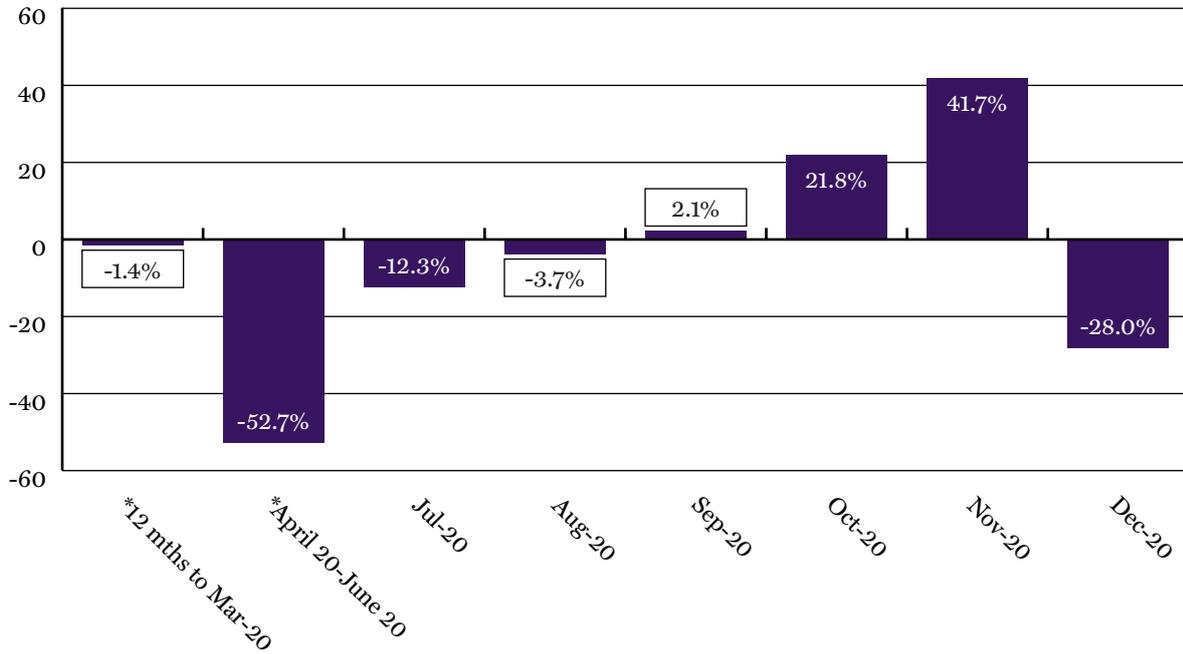
which makes sense [because] you're at home, all the time, so the kids needed a desk now [or] a computer. This [increase in demand] was noticeable (Organisation G, interview with researchers).

These changes are shown graphically below. Figure 5.5 shows the marked decline for in-bound calls during the First Wave, followed by ongoing declines each month until September 2020, as Second Wave coronavirus case numbers in Victoria were gradually brought under control due to the extended lockdown. In October and November, calls began to increase again—albeit from a much lower base—before falling again in December.

Figure 5.6 shows the changing proportion of first-time callers and zero income callers throughout 2020. This data shows that the proportion of the former continued to rise from the beginning of the First Wave until peaking at over a quarter of all in-bound calls in September 2020, then declining after the Second Wave subsided in Victoria. A similar trend was experienced for the latter category of zero income callers, peaking at 14 percent—over 1 in every 7 callers—in September before also beginning to decline as lockdown conditions gradually ended and employment opportunities began to recover. By way of comparison, the percentage of callers on JobSeeker during this early 'recovery' period increased from 23.4 percent in September to 26.7 percent in December 2020.

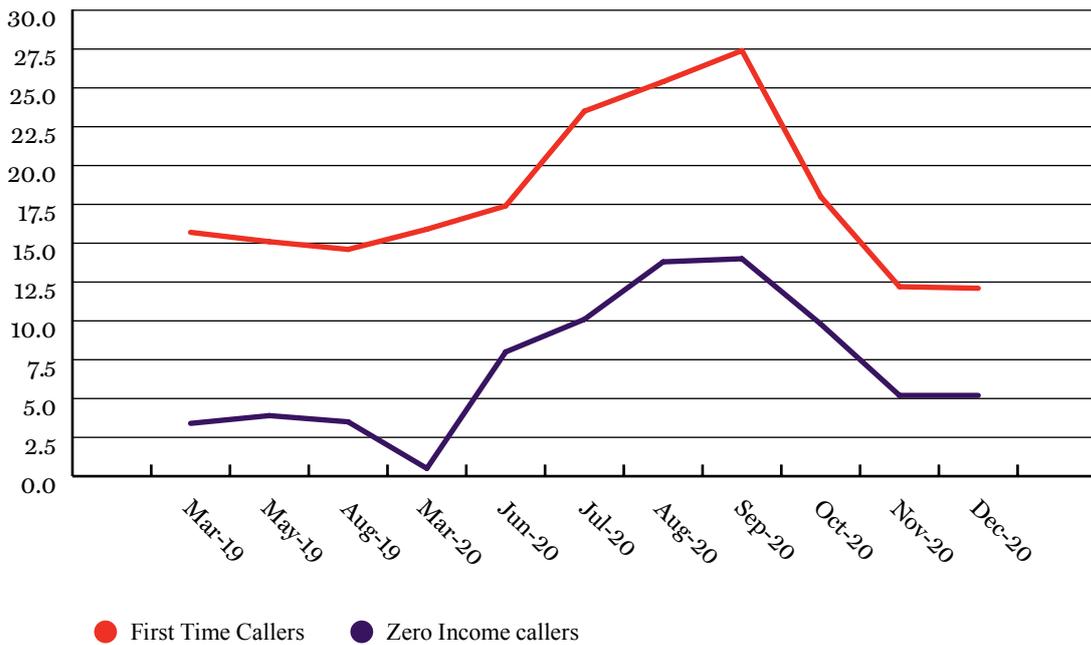
However, complete datasets are still emerging. The course and nature of change is not yet fully captured by the data presented in this report, much of which is annualised and does not yet capture the 'ebb and flow' of month-to-month operations during the waves of the pandemic.

FIGURE 5.5 PERCENTAGE (%) MONTHLY CHANGE, IN IN-BOUND CALLS FOR ASSISTANCE, ORGANISATION G (2020)



Month-to-month except*

FIGURE 5.6 PERCENTAGE (%) OF 'FIRST TIME' AND 'ZERO INCOME' CALLERS IN TOTAL IN-BOUND CALLS FOR ASSISTANCE, ORGANISATION G (2020)



Horizontal axis not to scale

FAMILY VIOLENCE SERVICES DURING THE PANDEMIC

Like Organisation E (cf. Figure 5.4), Organisation D reported a decline in inbound calls by women experiencing family violence and a corresponding fall in case management numbers for FY2019/20. Organisation E and Organisation F both recorded a decline in the total number of women and children assisted with crisis accommodation.

In sharp contrast to emergency relief services, however, the decline in the number of family violence-related calls for FY2019/20 should *not* be attributed to a declining need for assistance. These trends are, instead, influenced by the nature of lockdown conditions which, during the First Wave and the early weeks of the Second Wave in Victoria, acted as a barrier or further disincentive for women and children who may have otherwise sought to flee violent situations:

Initially there was a substantial drop in [in bound] phone calls, which was really alarming because it didn't mean there was less need. It was probably more to do with lack of opportunity really to make that phone call given you're locked down with the person that's abusing you... Perpetrators would use [COVID] as a form of control by saying, 'You can't leave, you're stuck with me', or 'I won't let you back in if you've been out [because] you might get COVID.' [Perpetrators] were really using that as part of coercive controlling. So I think that also meant a lot of people didn't feel like [they] could leave... So we did see initial drop [in calls]. But since then, it's just continued to increase (Organisation E, interview with researchers).

Service providers also reported an increase in the proportion of women on temporary visas seeking support due to family violence. One survey found that nearly half (45 percent) of case workers supporting women in this category reported an increase in violence experienced by clients. There were also some changes in the source of violence—for example, an increase in female migrants who experienced abuse, harassment or violence from housemates while living in shared housing arrangements (Berg and Farbenblum, 2020).

A QUT survey of family violence case workers in 2020 found most agencies experienced rising case numbers and a rising number of victims from CALD communities. In total, 2 in every 5 participants reported a significant rise in cases involving coercive and controlling behaviour (Carrington et al., 2020). There was also evidence of family violence becoming more severe:

What was [already] coercive control and emotional abuse was becoming physical abuse. There were definite signs of an increase in the level of violence, in the duration and the intensity (Organisation H, interview with researchers).

Lockdown conditions exacerbated many prevailing problems confronting women and children fleeing family violence. In general, the duration of emergency accommodation was extended as clients and service providers struggled to find more permanent accommodation arrangements:

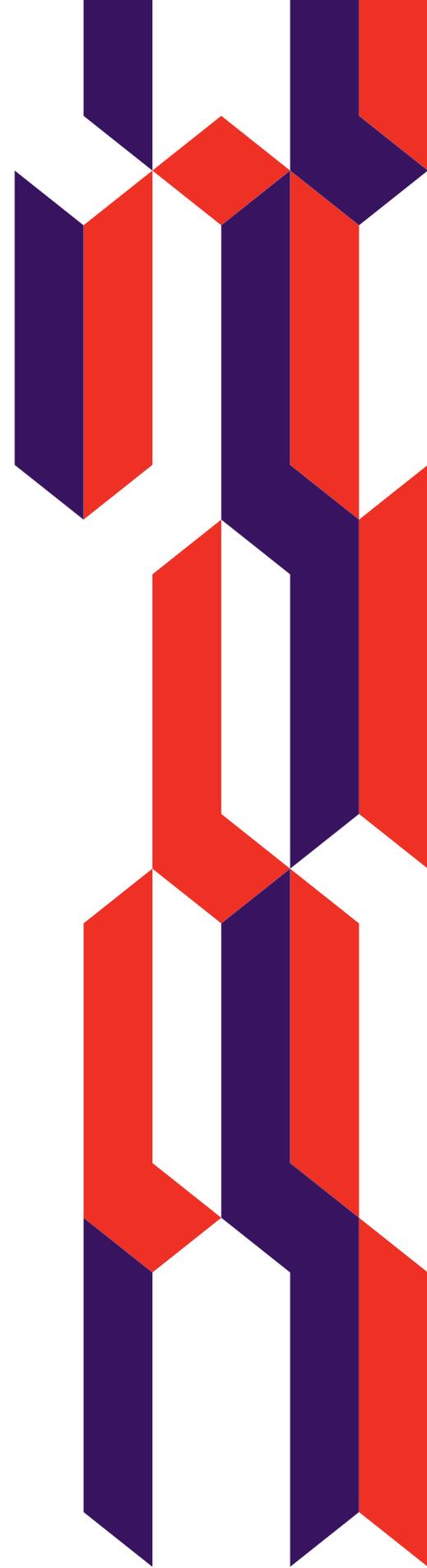
The private rental system is way out of control in terms of cost. For public housing, the waiting list is so ridiculously high and social housing is still really difficult. There's [new funding for social and community housing in Victoria] so, hopefully, in a couple of years' time things will look a bit different (Organisation H, interview with researchers).

A further sign of change during the pandemic was evidence of a shift in the demographic composition of women and children seeking to flee family violence. For example, Organisation E reported an increase in the proportion of

women from CALD backgrounds seeking assistance—from 22 percent in FY2018/19 to 26 percent in FY2019/20. To reiterate, more detailed analysis of demographic trends can be conducted as updated and higher frequency time series data becomes available.

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STAKEHOLDER ENGAGED SCHOLARSHIP UNIT (SESU)

E: sesu@acu.edu.au

W: acu.edu.au/sesu