



 **Housing Hub.**

Specialist Disability Accommodation Supply in Australia

December 2024

Specialist Disability Accommodation – Supply in Australia

Seventh *SDA Supply in Australia* report – December 2024

First *SDA Supply in Australia* report – March 2019

Housing Hub

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Acronyms

CHP	Community Housing Provider
DRC	Disability Royal Commission
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
SA4	Statistical Area Level 4
SDA	Specialist Disability Accommodation

Executive Summary

This report details the results from a survey of organisations that develop Specialist Disability Accommodation (SDA) for participants of the National Disability Insurance Scheme. This is the seventh iteration of the survey, providing a longitudinal perspective on the development of SDA across Australia. The results of the survey are contextualised using recent reports and findings pertaining to the SDA market. The key findings of the survey are presented below, with reference to last year's results in the footnotes.

Key findings

- There were **2,590 SDA places** in development across **1,703 dwellings**¹
- The jurisdictions with the largest proportions of pipeline places were **New South Wales (24.2%), Victoria (23.0%), Western Australia (19.9%), and Queensland (18.6%)**²
- Pipeline places in **houses (46.4%)** were the most common, with places in **apartments (29.3%)** being the second most common³
- **Group home places (2.3%)** have continued to have a diminishing presence in the pipeline⁴
- **Single resident places (41.0%)** and **dwellings (62.4%)** were the most prevalent⁵
- **High Physical Support (72.1%)** continued to make up the majority of pipeline places⁶
- Many pipeline places (**54.1%**) were in the **construction phase** of development⁷
- Confidence in the SDA market has fallen, with many (**41.1%**) respondents reporting being **'slightly' or 'very' unconfident**⁸
- A smaller number of respondents (**35.8%**) reported being **'slightly' or 'very' confident**⁹
- One third of SDA pipeline places are expected to be ready for occupancy by the **end of 2024 (32.9%)**, with a further half being ready by the **end of 2025 (53.0%)**¹⁰

¹ The number of places and dwellings surveyed this year has increased by 303 and 160, respectively, compared to last year

² Compared to last year: New South Wales +1.2%, Victoria +2.6%, Western Australia -8.1%, Queensland +2.4%

³ Compared to last year: houses +13.3%, apartments -8.4%

⁴ Compared to last year: group homes -3.3%

⁵ Compared to last year: single resident places -5.1%, single resident dwellings -6.0%

⁶ Compared to last year: High Physical Support +0.6%

⁷ Compared to last year: under construction +10.7%

⁸ Compared to last year: 'slightly' or 'very' unconfident +22.2%

⁹ Compared to last year: 'slightly' or 'very' confident -21.0%

¹⁰ In last year's survey sample, 20.8% of places were expected to be ready for occupancy by the end of the same year (2023), with 56.8% expected to be ready by the end of the following year (2024)

- **2,496 future pipeline places** are being planned¹¹

Table 1 shows the number of SDA dwellings and places in development across Australia.

Table 1 – Estimated number of SDA dwellings and places in development as at September 2024

State	Dwellings	Places
NSW	488	627
VIC	384	595
QLD	309	481
WA	313	516
SA	171	309
TAS	12	20
ACT	17	24
NT	9	18
Total	1,703	2,590

¹¹ The number of future pipeline places being planned from last year's survey was 2,816

Introduction

As of June 2024, more than 650,000 people with disability in Australia received funding under the National Disability Insurance Scheme (NDIS).¹² One of the support options funded under the NDIS is Specialist Disability Accommodation (SDA). SDA is housing (i.e., the bricks and mortar) that is specially designed for people with disability who have an ‘extreme functional impairment and/or very high support needs’, with the aim of supporting their independence and the delivery of other supports.¹³ Funding for SDA is designed to create a user-driven market in which eligible participants are able to choose an SDA dwelling from a registered provider that meets their individual needs and preferences. Through this, the SDA funding model is intended to promote choice and control for NDIS participants over where, how, and with whom they live.

Although relatively straight-forward in its intentions, the SDA market is a complex and rapidly evolving landscape. In 2023, the National Disability Insurance Agency (NDIA) released the *SDA Pricing Review* which investigated the SDA pricing structure and set new prices for SDA dwellings. These new prices came into effect in July 2023.¹⁴ Some of the key changes included a decrease in prices for most High Physical Support dwelling types and an increase in prices for Improved Liveability dwellings and 2-residents houses. As part of the *SDA Pricing Review*, the NDIA also released a *Demand Projections* report, which modelled the forecasted demand for SDA over the next 20 years.¹⁵ Overall, the demand for SDA is projected to increase to 36,684 people by 2042 (from the 20,663 participants with SDA funding as of June 2024), with the greatest demand expected to be in New South Wales and Victoria. In terms of design categories, the NDIA estimates that demand will (proportionally) decrease for Improved Liveability dwellings and increase for Fully Accessible, Robust, and High Physical Support dwellings. It is important to note that the recent *NDIS Review* introduced additional layers of complexity for SDA providers and investors by proposing changes to the funded design categories.¹⁶

¹² NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement E, Table E.1. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

¹³ NDIA (2022). *Specialist Disability Accommodation: Operational guidelines*. National Disability Insurance Agency. Downloaded 28 October 2024. <https://ourguidelines.ndis.gov.au/media/1668/download?attachment>

¹⁴ NDIA (2023). *Specialist disability Accommodation Pricing Review 2022-23: Final report*. National Disability Insurance Agency. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

¹⁵ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23: Demand projections*. National Disability Insurance Agency. Downloaded 28 October 2024.

<https://www.ndis.gov.au/media/6289/download?attachment?attachment>

¹⁶ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS - Independent Review into the National Disability Insurance Scheme: Final Report*. Downloaded 28 October 2024.

<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

Recommendations included the removal of the Improved Liveability design category and the creation of a new design category for participants who share living supports. Thus, while the new pricing structure and demand projections model were intended to guide investments and supply in the SDA market over the next few years, the recommendations in the *NDIS Review* have introduced some level of uncertainty about the future of SDA.

As of June 2024, 20,663 NDIS participants had SDA funding in their plans.^{17,18} However, as noted in the 2023-24 Q4 quarterly report, only \$316 million of the \$470 million allocated to SDA participant plans had been paid to SDA providers.¹⁹ This shows that just 67.2% of SDA participant funding was utilised in 2023-24. The gap between allocated and spent funding stems from multiple factors. Some individuals may have been assigned funding for housing types that don't meet their needs, or the specific dwellings they require may not be available in their area.²⁰ This underscores the need for more comprehensive and transparent data on supply and demand, enabling providers to build housing that aligns with demand.

As of June 2024, there were 9,487 enrolled SDA dwellings across Australia, marking a 19.7% rise in the number of registered dwellings since June 2023.²¹ This growth trend was seen across most design categories, with the most significant increases being in the Robust design category (up by 54.4%, an increase of 362 dwellings) and the High Physical Support category (up by 39.5%, an increase of 1,053 dwellings).²² With the exception of the Australian Capital Territory, all states and territories recorded an increase in enrolled SDA dwellings in the last quarter.²³ These dwellings collectively provide 23,053 SDA places,²⁴ which exceeds the number of NDIS participants using their SDA funding (20,663; 14,179 with SDA in use and 6,484 with SDA not in use).^{25,26} There are an additional 3,471 participants who are eligible for SDA funding, meaning the number of places is fewer than the total number of participants with SDA funding or an

¹⁷ A decrease from 23,092 in 2023, due to SDA funding only being recorded if it is actively in use

¹⁸ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Pg. 58. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/7220/download?attachment>

¹⁹ Ibid. Pg. 58.

²⁰ Ibid. Pg. 59.

²¹ Ibid. Pg. 59.

²² Ibid. Pg. 59.

²³ Ibid. Pg. 59.

²⁴ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.11 & P.12. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

²⁵ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Pg. 58. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/7220/download?attachment>

²⁶ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.9. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

SDA need (24,134). Of the 9,487 enrolled dwellings, just over half (57.5% or 5,458 dwellings) are classified as New Build stock providing about 9,823 New Build places for participants.²⁷ New Build stock are dwellings that have been issued their first certificate of occupancy on or after 1 April 2016 (the year the NDIA started enrolling SDA).²⁸ The remaining dwellings (42.5%) consist of Existing and Legacy stock.²⁹ Existing dwellings are those with a certificate of occupancy from before 2016 and are registered to house five or fewer long-term residents, with Legacy dwellings being similar, but are instead intended to house more than five long-term residents.³⁰ These dwellings often fall short of modern disability housing standards and are often unsuitable options for people with disability.

The NDIA also reports a total of 6,082 New Build SDA dwellings that were unfinished (unenrolled) as of June 2024,³¹ which is almost double the number compared to last year in June.³² While this data provides useful insights into the pipeline activity for SDA dwellings, it is somewhat restricted by the stage of development at which providers must report their pipeline (i.e., at the design stage). Considering the significant time, effort and risks involved in planning, financing, and building new SDA, stakeholders in the market need a more detailed and comprehensive understanding of the projected SDA supply. Indeed, the *NDIS Review* emphasised the importance of increased access to comprehensive and transparent market data concerning housing and living supports (recommendation 9) and increased market monitoring (recommendation 13).³³ As such, this report provides further data on the pipeline of SDA properties, which are critically needed to guide the decision making of investors and developers in the SDA market.

Aim

²⁷ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.11. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

²⁸ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency, Glossary. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

²⁹ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.12. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

³⁰ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency, Glossary. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

³¹ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.8. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

³² Ibid. Supplement P, Table P.20.

³³ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS - Independent Review into the National Disability Insurance Scheme: Final Report*. Downloaded 28 October 2024.

<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

The Housing Hub conducted a national survey of organisations who provide SDA in September 2024. This survey was intended to collect information on current SDA developments in Australia. This information was used to gain insight and understanding into the current SDA development landscape. The data collected provides unique value beyond the unfinished (unenrolled) dwelling data presented by the NDIA,³⁴ as it includes pipeline dwellings that are in the early stages of development and that are yet to be reported to the NDIA. This pipeline data is later shown alongside the NDIA's enrolled data to provide a more detailed view of the current and estimated supply of SDA in Australia. This report also provides insight into the organisations who are developing SDA and their roles in the market.

Method

A registration of interest form for the survey was advertised to potential participants via the Housing Hub's social media, digital newsletters, and direct emails to SDA providers.³⁵ The survey was also advertised by PowerHousing Australia, a peak body in the industry. Once registered, participants were sent links to the survey. Some participants from last year's survey were also contacted directly with survey links. Once the survey opened in early September, it remained open for 3 weeks.³⁶

The survey comprised of 2 parts:

1. An online survey administered through QuestionPro.³⁷ This part of the survey assessed the market approaches and confidence of respondents, and
2. A survey of the respondent's current pipeline of SDA dwellings via Google Sheets. This part of the survey assessed the nature and details of current SDA developments

Following the change from an Excel spreadsheet to a Google Sheet in the year's previous survey, the same method was used this year. New participants were sent a blank template (with an example sheet showing how to fill out the actual sheet).

³⁴ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.16. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

³⁵ The overall mailing list consisted of the mailing list from last year's survey, the Housing Hub's mailing list of SDA providers, and the NDIA's list of registered SDA providers. The NDIA's list was filtered such that only head offices and recently active providers (who had received payment for providing SDA within the previous 3 months) were included.

³⁶ The survey was originally intended to be run for 2 weeks, but this was extended to give additional time for potential participants.

³⁷ Some changes were made to the QuestionPro survey compared to the previous year's survey. Some questions were removed to streamline the survey process and focus on key areas. The questions that were removed pertained to the different resources used and consulted when making decisions about SDA developments, as well as property and tenancy management.

Returning participants from 2023 were sent a personalised sheet that carried over the dwellings they had previously reported and that were still in the pipeline as of September 2023. These dwellings had the data for development status and whether the NDIA had been notified about them deleted in the sheet to prompt respondents to indicate whether there had been any update to these details. They were also asked to update any information that had changed since the previous survey (such as the estimated occupancy date or the design category), as well as provide details on any new SDA dwellings they had in the pipeline. Once the pipeline survey had been completed by the respondent, the data was checked and if there was any uncertainty about the data, a follow-up was conducted.

While the amount of time needed to complete the survey varied greatly based on how many dwellings were involved, most responses were estimated to take under 30 minutes to complete. All data collected was treated with strict commercial confidentiality, and any information that could be used to identify a response has been anonymised in this report, as was indicated to participants. Details on the data cleaning process are provided in Appendix A.

Limitations

It is important to note that the data and results presented in this report must be interpreted with respect to certain limitations. The main caveat for the data is that they are only a voluntary sample of organisations that are developing SDA dwellings and, as such, the data do not include every SDA dwelling in development in Australia. While the data represent some of the pipeline developments in progress, it is possible the true proportions vary from what is presented in this report. Though the survey did collect data for the current pipelines of 56 organisations, the NDIA's most recent estimate of SDA providers totalled 594, with 468 who were considered active providers.³⁸ Not all of these active providers would have been developing SDA at the time of the survey. Though many organisations are represented in the current data, it is not a complete picture of the SDA landscape. The survey also does not ask for any evidence of a contractual commitment to build from participants, and any data are accepted at face value.

Another important consideration is that the dwellings surveyed are not guaranteed to successfully achieve enrolment with the NDIA. Building costs and logistical concerns can result in developments being discontinued. This year, 120 dwellings that were reported in 2023 (consisting of 157 places) were reported as discontinued this year. Another 198

³⁸ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Table P.3. Downloaded 28 October 2024.
<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

dwellings that were reported in 2023 (with 327 places) have achieved enrolment as of this year. Even for the dwellings that do reach enrolment, they may not fit the same specifications they were originally reported with. The design category and even building type of a dwelling can change throughout the development process, and even once complete, there are situations where what was reported in the survey does not eventuate. For example, while some dwellings may be reported as a 2-resident house, an SDA provider may only accommodate 1 SDA participant. Alternatively, some dwellings may be enrolled as one design category, but provided to SDA participants with funding for a different category. Overall, it is important for readers to understand that while the data presented in this report may be accurate at this time for a sample of SDA-providing organisations, this information is not concrete and may change throughout the development process.

Results: Providers who participated

Number of providers who participated

The survey consisted of data from two sources; the QuestionPro online survey and the Google Sheets survey for pipeline information. A total of 49 organisations completed both parts of the survey. An additional 7 organisations completed the QuestionPro survey, totalling 56 respondents. Not all of the organisations who completed the pipeline survey had usable data, so only 45 respondents from this year were included (see Appendix A for more details). Pipeline data from last year's survey was carried forward to this year in instances where the organisation participated in 2023 but not 2024, and the development was unlikely to have been completed by the time of the survey in September 2024. This resulted in another 11 organisations being represented in the current data, totalling 56 organisations with usable pipeline data. Though the QuestionPro and pipeline surveys had the same total number of organisations included, not all organisations were necessarily represented in both components. A total of 71 different organisations are represented across both sources of the data.

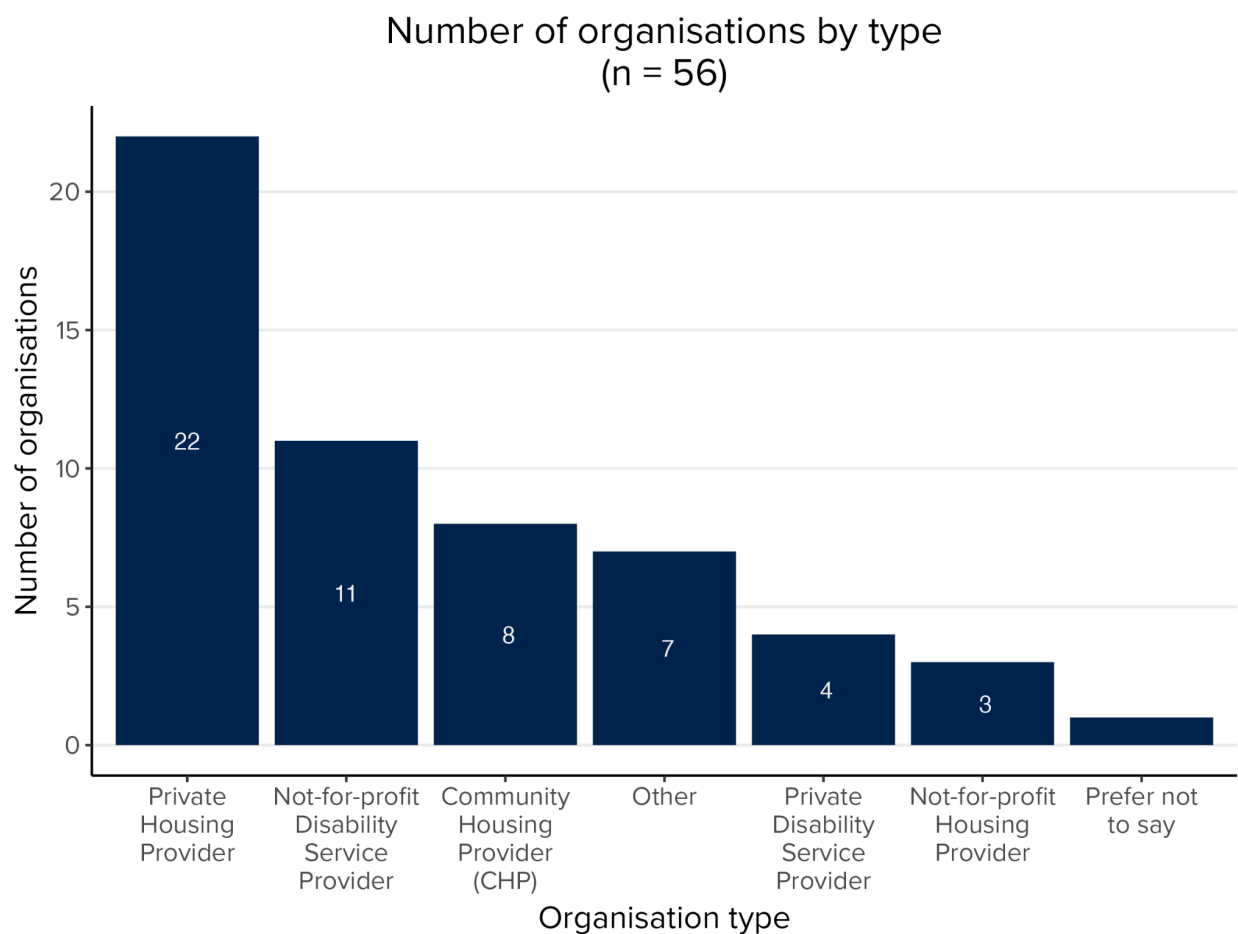
Please refer to Appendix B for a list of organisations who consented to being named in this report (as indicated in the QuestionPro survey). The organisations from 2023 who consented to being listed last year have also been included in this list.

Results: Provider approaches and confidence

Provider demographics

A variety of organisations develop and provide SDA to NDIS participants. Of the 56 respondents for the QuestionPro survey, 39.3% were private housing providers. Not-for-profit disability service providers were the next most common organisation type (19.6%), and community housing providers (CHP) the next after that (14.3%). Figure 1 shows the number of organisations by their organisation type.

Figure 1 - Types of organisations developing SDA in the sample



New organisations had started building their first SDA dwellings each year from 2016 (the year the NDIA started enrolling SDA) to 2024, though the most common year of first development was 2020 (28.6%). The average date of starting to build SDA was April 2020 ($SD = 29.7$ months).

Provider confidence in the SDA market

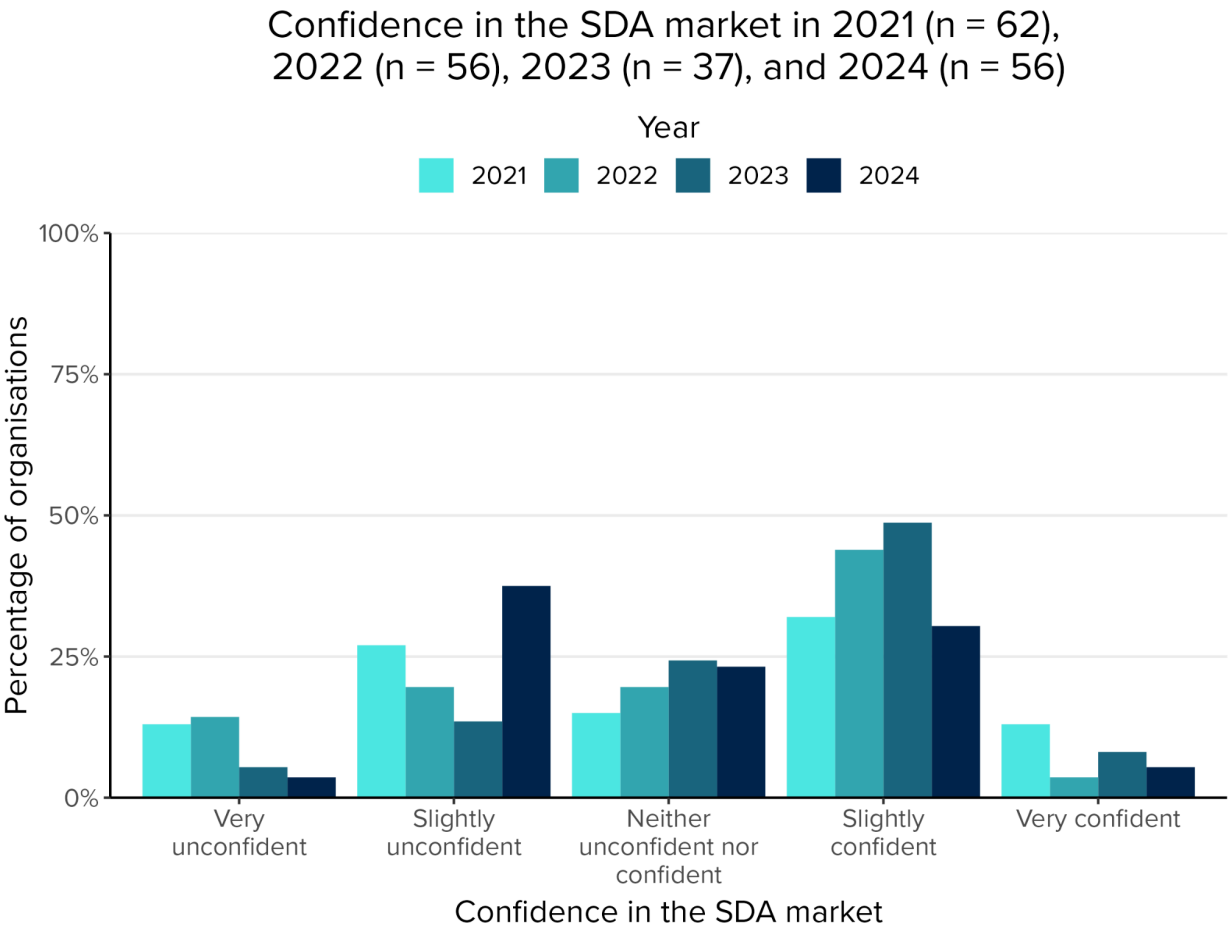
Current level of confidence in the SDA market

This year shows a noticeable decrease in provider confidence in the SDA market, where it had otherwise been increasing somewhat since 2021 (see Figure 2). While the percentage of responses on the extreme ends of the scale have not changed much from last year ('very unconfident', 3.6%, and 'very confident', 5.4%), the number of organisations who were 'slightly unconfident' increased (37.5%, an increase from 13.5%) and the number who were 'slightly confident' decreased (30.4%, a decrease from 48.7%). For those who were 'neither unconfident nor confident', the percentage did not change much (23.2%, down from 24.3%). A common explanation for levels of confidence in the market included uncertainty around the NDIA (particularly in relation to the *Disability Royal Commission* [DRC],³⁹ the *NDIS Review*,⁴⁰ and the reforms stemming from them).

³⁹ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*. Downloaded 28 October 2024. <https://disability.royalcommission.gov.au/system/files/2023-09/Final%20Report%20-%20Volume%207%2C%20Inclusive%20education%2C%20employment%20and%20housing%20-%20Summary%20and%20recommendations.pdf>

⁴⁰ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS. Independent review into the National Disability Insurance Scheme: Final report*. Downloaded 28 October 2024. <https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

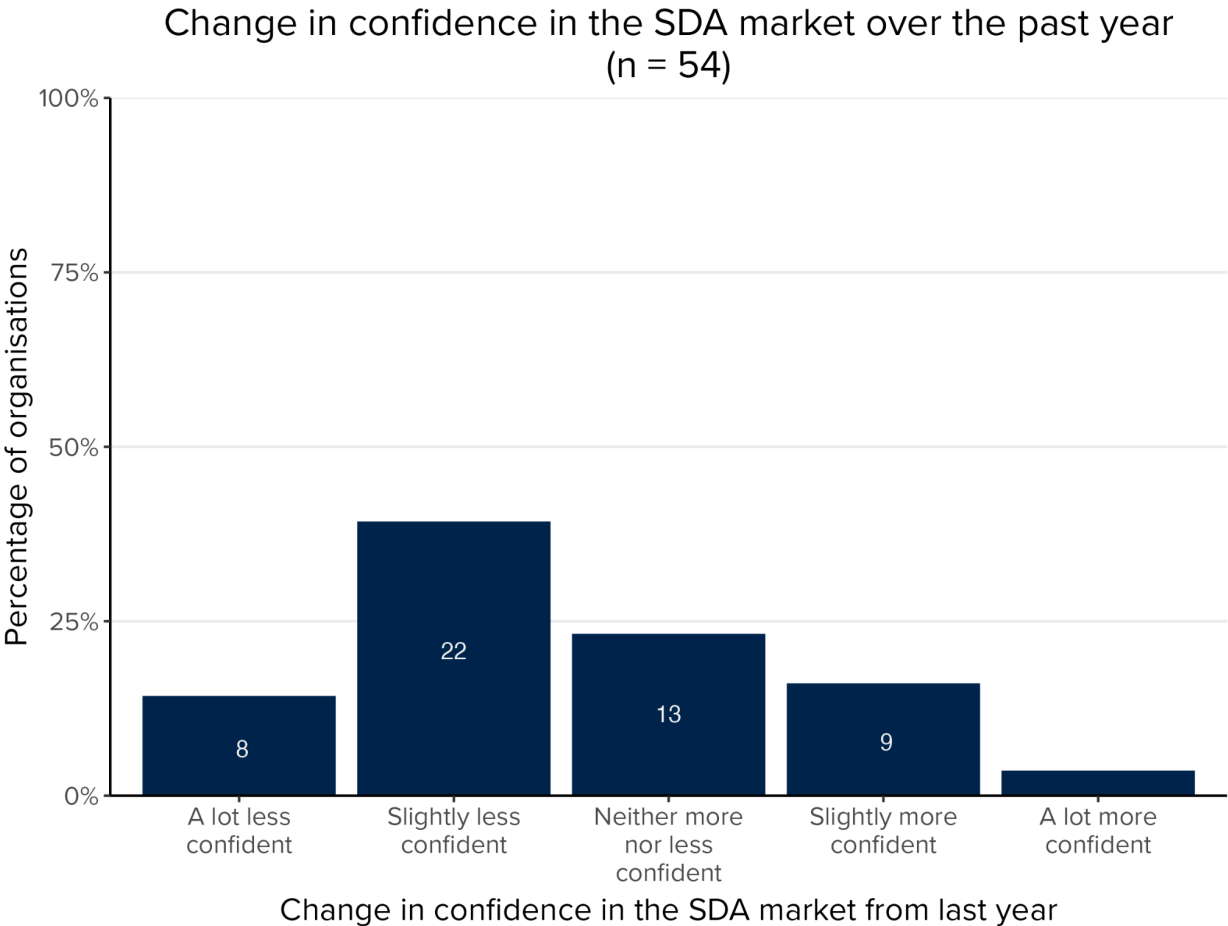
Figure 2 - A comparison of confidence in the SDA market over time



Change in level of confidence and explanation for the change

Mirroring the change in confidence in Figure 2, Figure 3 shows many organisations reported being ‘slightly less confident’ (40.7%) or ‘a lot less confident’ (14.8%) compared to last year, whereas fewer organisations reported an increase in confidence (‘slightly more confident’ - 16.7%, ‘a lot more confident’ - 3.7%). ‘Not applicable’ was selected by 2 respondents, as they were not providing SDA 12 months prior to the survey.

Figure 3 - Change in confidence levels in the SDA market over the past 12 months



Vacancy Rates and Risks

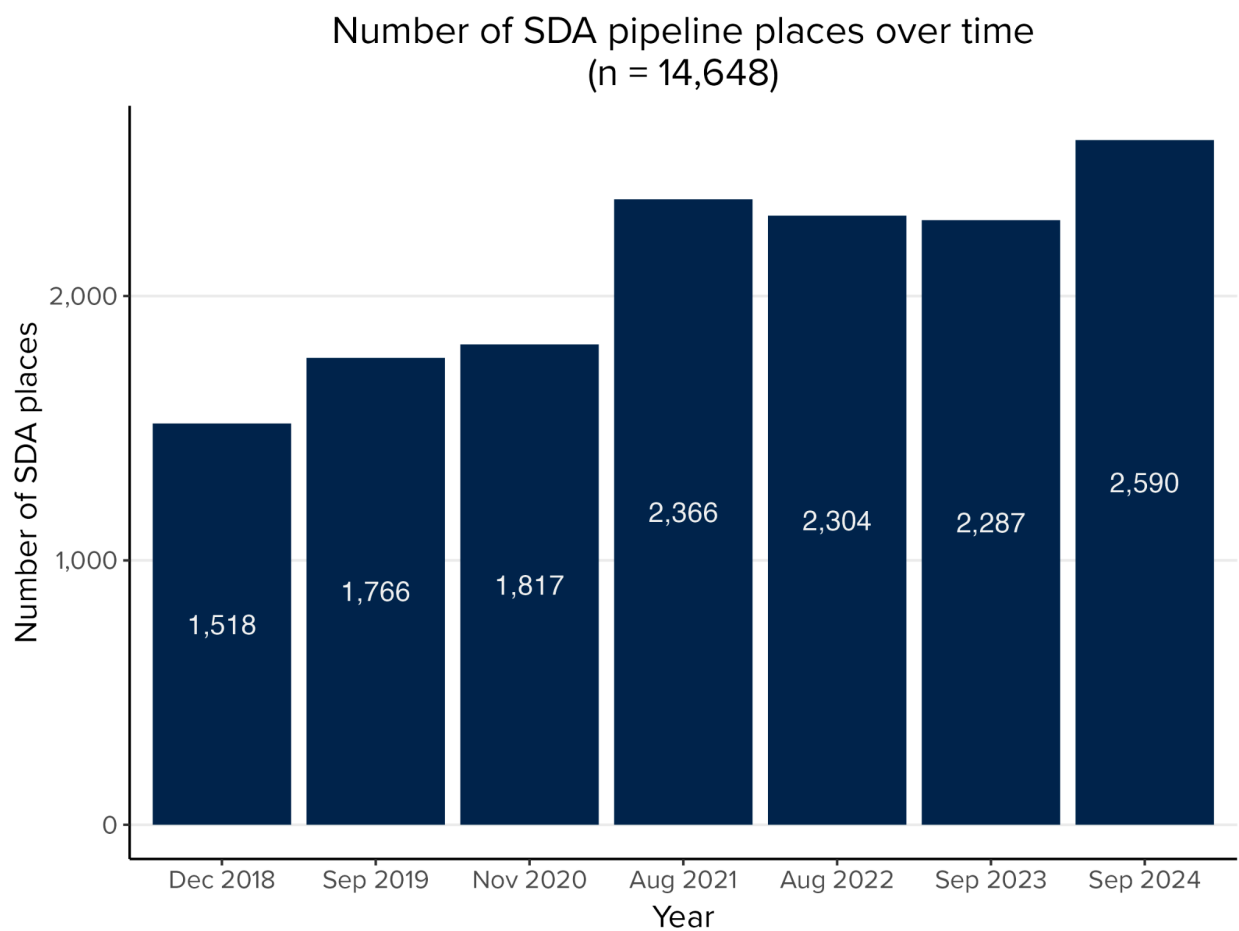
When asked about the vacancy rates for their SDA dwellings, the reported rates ranged from 0% to 99.0% with a mean of 20.0% and a standard deviation of 25.4%. The distribution of vacancy rates indicates that most of the surveyed organisations have some vacancies, with a small proportion having high and very high rates of vacancy. When asked about the greatest risk to their organisation at the moment, many cited difficulty finding tenants and filling vacancies.

Results: SDA supply pipeline

The pipeline survey dataset, consisting of data from 56 organisations, shows a total of 2,590 SDA places across 1,703 dwellings. On average, there are 1.5 SDA places per dwelling in this dataset.

The previous 6 years of the SDA supply survey sampled totals of SDA places ranging between 1,518 to 2,366, and this year’s total exceeded them with 2,590 places (shown in Figure 4).

Figure 4 - Estimated number of SDA supply pipeline places over time



This report pertains to SDA places and dwellings that are currently being developed, or in the *pipeline*. To reduce overlapping with the NDIA’s published data on unenrolled dwellings, only the pipeline collected in the survey will be considered for this report. A development is considered to be in the pipeline if it is in any of the following stages:

- Construction completed, pending enrolment with the NDIA

- Under construction
- Development stalled
- Development and building approval completed and contractually committed to build
- Land secured, waiting for building approval and/or finance approval

Appendix A provides a detailed account of the data screening process for this section.

Some of the data collected in this survey may overlap with the NDIA's data on unfinished dwellings, though the unique contribution of this survey is highlighted by the number of places in dwellings that are currently in development before they are reported to the NDIA. The NDIA is often not notified of a dwelling in the pipeline until the design phase. Additionally, when asked whether the NDIA had been notified about the pipeline places, the NDIA had not been notified of at least 40.6% of pipeline places. Respondents were unsure whether the NDIA had been made aware of a further 22.8%.

SDA supply pipeline: National overview

Maximum number of residents

As shown in Table 2, single SDA resident places were most prevalent in this year's survey (41.0%), continuing the trend of the market prioritising independent living. Places in dwellings with 2 and 3 SDA residents were also common, with 31.5% and 25.1% of places, respectively. These percentages are similar to last year's, though it appears a larger emphasis has been put on 2-resident dwellings (encompassing 8.3% more of the total number of places from last year) to the detriment of 1-resident dwellings (5.1% less). Only a small proportion of places were in 4-resident dwellings (2.3%, down from 5.4% in 2023) and no 5-resident dwelling places (down from 0.2% in 2023) were reported. Overall, organisations are focusing on providing more options for people to live by themselves or with a small number of people. A recent snapshot of housing seekers' preferences, based on Housing Hub search data, indicated seekers were mostly looking for properties where they could live alone, demonstrating the need to focus on dwellings with fewer places to align with the preferences of housing seekers.⁴¹

⁴¹ Aimers, N., Morgan, A. J., Tuohy, L., Rathbone, A., & Longworth, D. (2024). *Accessible Housing Data Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation. Downloaded 28 October 2024. <https://www.housinghub.org.au/resources/article/accessible-housing-data-snapshot-july-2024-seekers-supporters>

Table 2 - Number and percentage (%) of SDA dwellings ($n = 1,703$) and places ($n = 2,590$) in the sample by maximum number of residents

Maximum number of residents	Dwellings	% of dwellings	Places	% of places
1	1,063	62.4%	1,063	41.0%
2	408	24.0%	816	31.5%
3	217	12.7%	651	25.1%
4	15	0.9%	60	2.3%
5	0	0	0	0

Location

The 2024 survey has captured a sample that spans all states and territories in Australia (Table 3). New South Wales shows the largest number of pipeline places (24.2%), closely followed by Victoria (23.0%). Interestingly, while the two states have very similar numbers for SDA places in the pipeline, New South Wales has 104 more dwellings in the pipeline, indicating a higher number of single SDA resident dwellings. Western Australia (19.9%) and Queensland (18.6%) have similar proportions of places, with South Australia having a notably smaller amount (11.9%). The Australian Capital Territory (0.9%), Tasmania (0.8%), and the Northern Territory (0.7%) make up a very small number of the total SDA places in development. These percentages show some similarity with recent Housing Hub search and listing data, though that data shows more emphasis on Victoria and less on New South Wales and Western Australia.⁴²

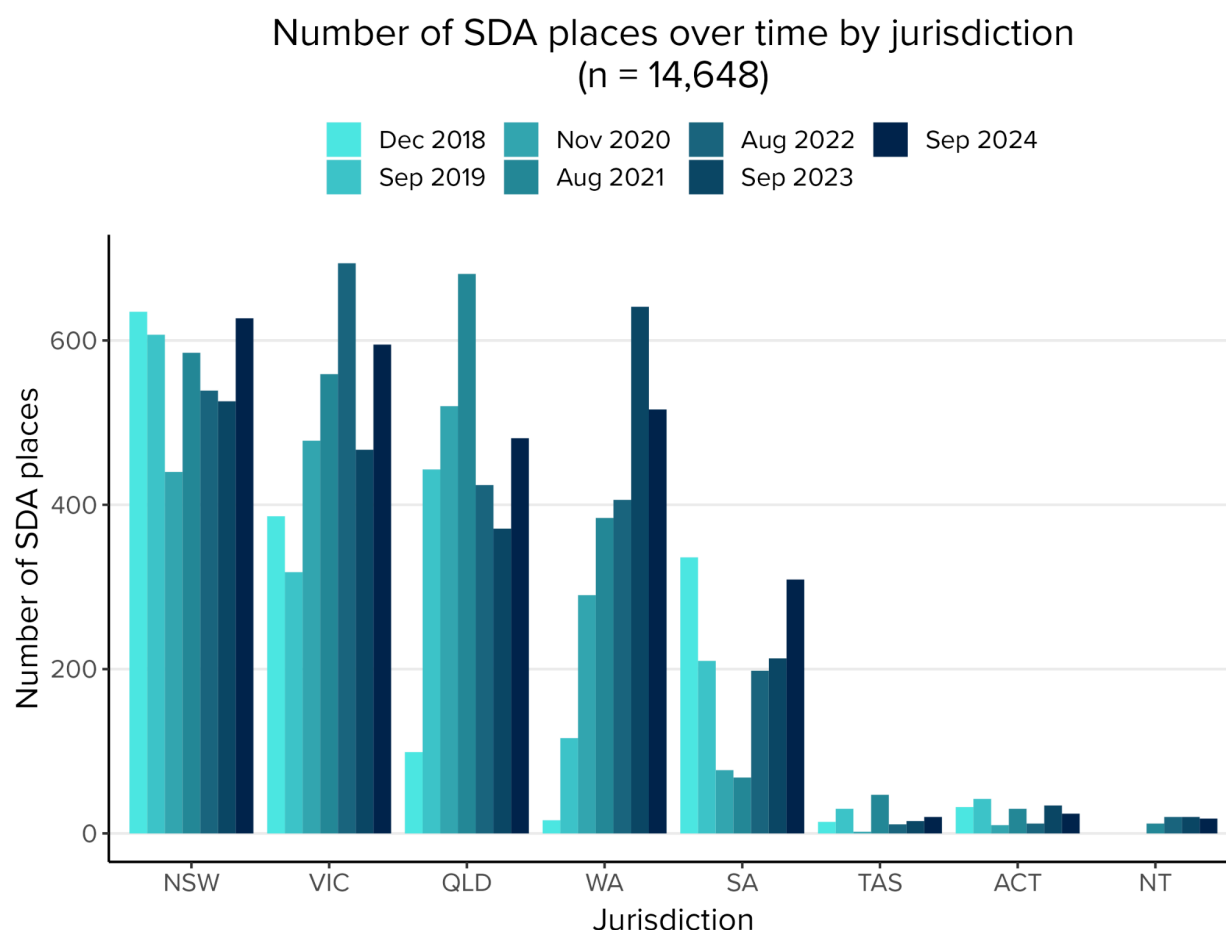
⁴² Aimers, N., Morgan, A. J., Tuohy, L., Rathbone, A., & Longworth, D. (2024). *Accessible Housing Data Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation. Downloaded 28 October 2024. <https://www.housinghub.org.au/resources/article/accessible-housing-data-snapshot-july-2024-seekers-supporters>

Table 3 - Number and percentage (%) of SDA dwellings ($n = 1,703$) and places ($n = 2,590$) by state and territory

Jurisdiction	Dwellings	% of dwellings	Places	% of places
NSW	488	28.7%	627	24.2%
VIC	384	22.5%	595	23.0%
QLD	309	18.1%	481	18.6%
WA	313	18.4%	516	19.9%
SA	171	10.0%	309	11.9%
TAS	12	0.7%	20	0.8%
ACT	17	1.0%	24	0.9%
NT	9	0.5%	18	0.7%

Figure 5 shows how the number of pipeline places have changed over the seven years of the survey. The most striking change is the reduced number of SDA pipeline places for Western Australia (from 641 down to 516), whereas New South Wales, Victoria, Queensland, and South Australia have each had an increase of around 100 places. Western Australia contained the largest portion of pipeline places in 2023, but has fallen behind New South Wales and Victoria this year. While this could be indicative of a relative slowdown in SDA development in Western Australia compared to the rest of Australia, it is also possible these differences have occurred due to slight differences in which organisations participated in the survey this year.

Figure 5 - A comparison of SDA places in development over time



Note: December 2018 (n = 1,518 places), September 2019 (n = 1,766 places), November 2020 (n = 1,817 places), August 2021 (n = 2,366 places), August 2022 (n = 2,304 places), September 2023 (n = 2,287 places), September 2024 (n = 2,590 places).

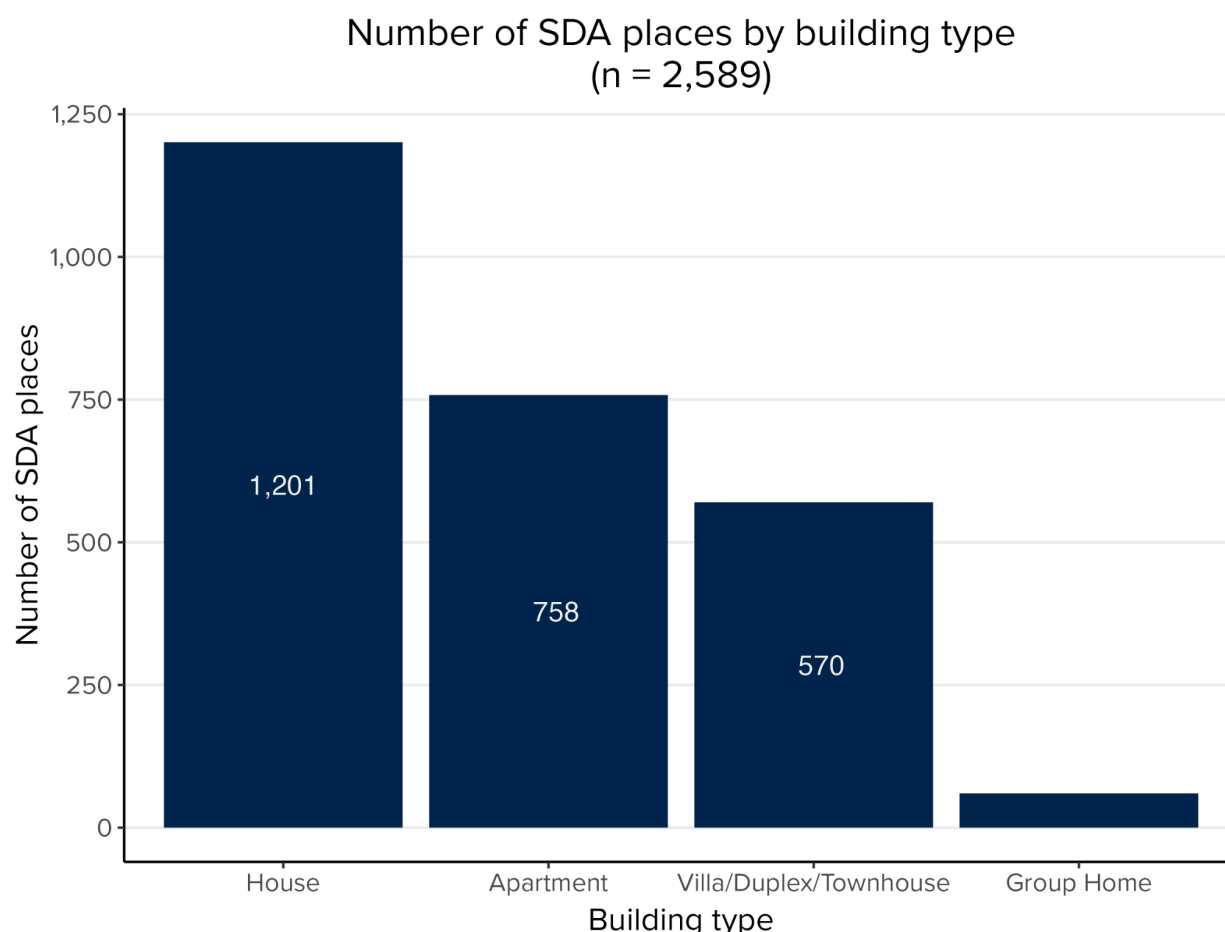
Building type

SDA dwellings can fall into one of four building types, being houses, apartments, villas/duplexes/townhouses, and group homes. Each building type has specific criteria that categorises them, and they are priced separately under the pricing arrangements.⁴³ Appendix C provides a brief description of the building types. As can be seen in Figure 6, houses have increased to be the most common pipeline building type in terms of places (46.4%), with apartments (29.3%) and villas/duplexes/townhouses (22.0%) contributing smaller percentages because of this. In last year's survey, houses and apartments were roughly equal. Group homes continue to be the least common source of SDA places, with

⁴³ NDIA (2023). *Pricing arrangements for specialist disability accommodation*. National Disability Insurance Agency. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/7274/download?attachment>

only 2.3% of the share this year, highlighting the pivot from group homes to individualised living, matching the preferences of housing seekers.⁴⁴ Housing Hub website profile data also indicates that there is still a strong preference for apartments that is not reflected in the current supply of listed vacancies.⁴⁵

Figure 6 - Estimated number of SDA places by building type across Australia



Note: 1 place did not have a building type provided, and was removed from this analysis.

As mentioned above, the number of SDA places in houses has grown dramatically this year, shown in Figure 7. This year's increase is likely reflecting the increased pricing for houses, particularly 2-resident houses, within the *2023 SDA Pricing Review*.⁴⁶ The slight spike in apartment places from last year did not last, also potentially reflecting the *SDA Pricing Review*, in which the prices for High Physical Support apartments (the most

⁴⁴ Aimers, N., Morgan, A. J., Tuohy, L., Rathbone, A., & Longworth, D. (2024). *Accessible Housing Data Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation. Downloaded 28 October 2024.

<https://www.housinghub.org.au/resources/article/accessible-housing-data-snapshot-july-2024-seekers-supporters>

⁴⁵ Ibid.

⁴⁶ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency, Exhibit 28. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

common type of SDA pipeline place in last year's survey)⁴⁷ decreased. Apartment and group home places have fallen slightly this year, while villa/duplex/townhouse places have seen a slight increase after falling the previous year. The continued decrease of group homes reflects the recent recommendations to phase out group homes.^{48,49,50}

⁴⁷ Aimers, N., Morgan, A. J., Wellecke, C., Tuohy, L., Mulherin, P., Rothman, R., Rathbone, A., & Winkler, D. (2023). *Specialist Disability Accommodation Supply in Australia*. Melbourne, Australia: Housing Hub and Summer Foundation. Downloaded 28 October 2024. <https://www.housinghub.org.au/resources/article/sda-supply-in-australia-2023>

⁴⁸ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 Final Report*. National Disability Insurance Agency, Recommendation 10. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

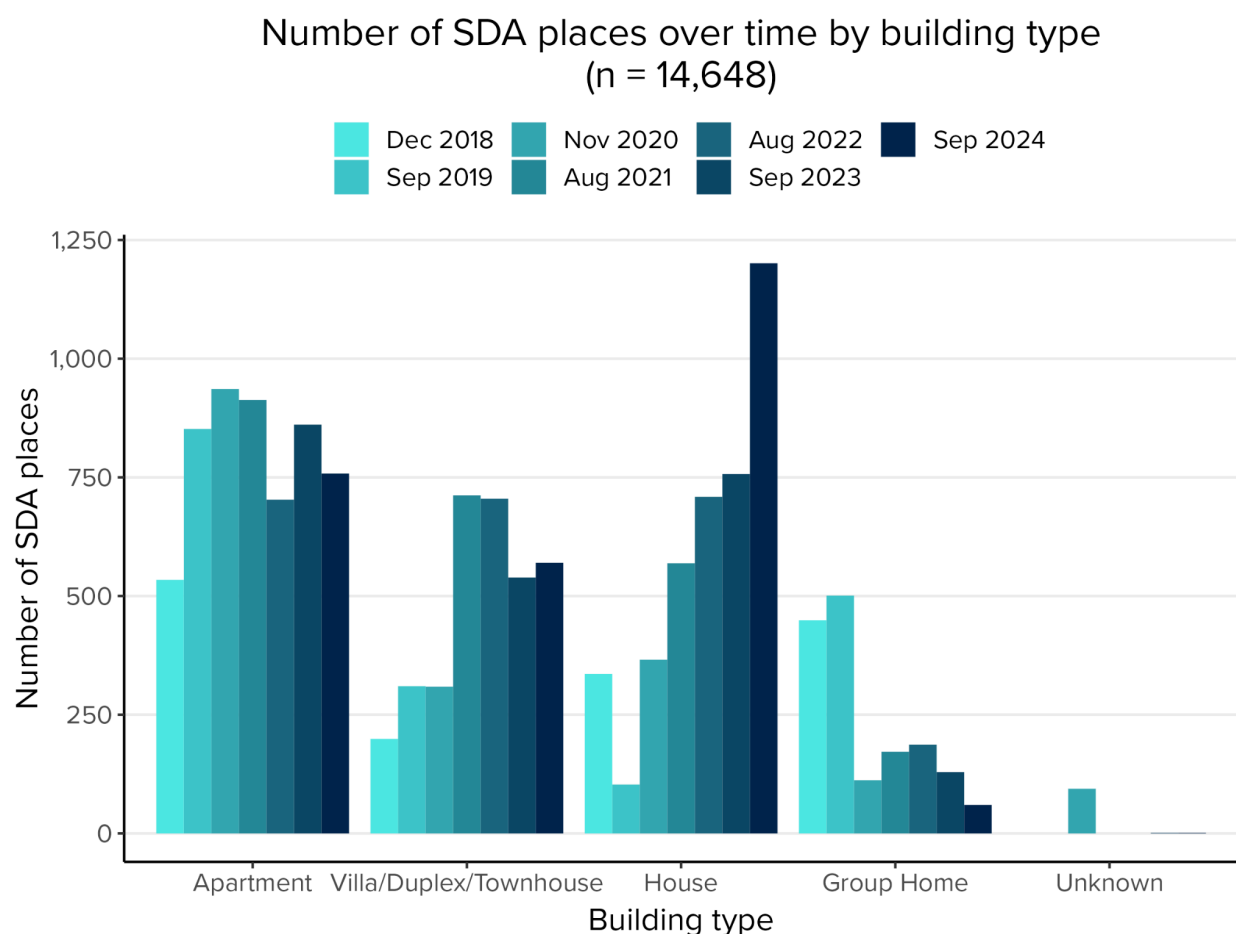
⁴⁹ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*, Recommendation 7.43/44. Downloaded 28 October 2024.

<https://disability.royalcommission.gov.au/system/files/2023-09/Final%20Report%20-%20Volume%207%2C%20Inclusive%20education%2C%20employment%20and%20housing%20-%20Summary%20and%20recommendations.pdf>

⁵⁰ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS. Independent review into the National Disability Insurance Scheme: Final report*, Pg. 141. Downloaded 28 October 2024.

<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

Figure 7 - A comparison of SDA places in development by building type over time



Note: December 2018 (n = 1,518 places), September 2019 (n = 1,766 places), November 2020 (n = 1,817 places), August 2021 (n = 2,366 places), August 2022 (n = 2,304 places), September 2023 (n = 2,287 places), September 2024 (n = 2,590 places). The 1 place with a missing building type from 2024 was included as 'Unknown'.

The states and territories reflect this emphasis on houses (Figure 8), with house places being the most common type for Victoria, Queensland, Western Australia, and South Australia. The Northern Territory also only reported house places this year. New South Wales breaks the trend by having more apartment places than any other type, while Tasmania and the Australian Capital Territory showed more villa/duplex/townhouse places. Group homes were absent from many jurisdictions' surveyed pipelines, with only Western Australia, New South Wales, and Victoria reporting any. Of note, Western Australia showed the largest number of group home places this year.

Figure 8 - Estimated number of SDA places across building type for each jurisdiction
Number of SDA places by building type and jurisdiction
(n = 2,589)

		Building type			
		Apartment	Villa/Duplex/Townhouse	House	Group Home
Jurisdiction	NSW	283	181	151	12
	VIC	134	154	303	4
	QLD	131	69	281	0
	WA	156	83	232	44
	SA	44	53	212	0
	TAS	0	16	4	0
	ACT	10	14	0	0
	NT	0	0	18	0

Note: 1 place did not have a building type provided, and was removed from this analysis.

The building types discussed in the above sections have been aggregated by their overall type (apartment, house, villa/duplex/townhouse, and group home). The NDIA's building type classifications do have a more granular breakdown of these types with respect to the number of residents per dwelling (and the number of bedrooms for apartments; shown in Table 4). Places in single resident dwellings were the most common (41.0%), similar to last year's proportion (46.1%) and people's preferences for living by themselves.⁵¹ The number of places in 2-resident dwellings (29.3%) and 3-resident dwellings (25.1%) were mostly driven by places in 2 and 3-resident houses. The places in 2-resident houses in particular have grown from last year by over 350 pipeline places (from 10.4% to 23.6%), in line with the timing of their pricing increase.⁵²

⁵¹ Aimers, N., Morgan, A. J., Tuohy, L., Rathbone, A., & Longworth, D. (2024). *Accessible Housing Data Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation.

<https://www.housinghub.org.au/resources/article/accessible-housing-data-snapshot-july-2024-seekers-supporters>

⁵² NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency, Exhibit 28. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

Places in group homes only contribute a small percentage of pipeline places, with 2.3% in 4-resident group homes and none in 5-resident group homes. These have decreased since last year's survey, where 5.4% and 0.2% of places were in 4 and 5-resident group homes, respectively. This, reduction of new group home places could be a result of the recommendations in the *DRC*⁵³ and *NDIS Review* reports.⁵⁴ Apartments overall had a reduction in their number of places and percentage of total places, reflecting a shift in focus from apartments to houses.

⁵³ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*, Recommendation 7.43/44. Downloaded 28 October 2024.

<https://disability.royalcommission.gov.au/system/files/2023-09/Final%20Report%20-%20Volume%207%2C%20Inclusive%20education%2C%20employment%20and%20housing%20-%20Summary%20and%20recommendations.pdf>

⁵⁴ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS. Independent review into the National Disability Insurance Scheme: Final report*, Pg. 141. Downloaded 28 October 2024.

<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

Table 4 - Estimated number and percentage (%) of SDA dwellings ($n = 1,702$) and places ($n = 2,589$) by building type (granular breakdown)

Building type	Dwellings	% of dwellings	Places	% of places
Apartment, 1 bedroom, 1 resident	157	9.2%	157	6.1%
Apartment, 2 bedrooms, 1 resident	539	31.7%	539	20.8%
Apartment, 2 bedrooms, 2 residents	29	1.7%	58	2.2%
Apartment, 3 bedrooms, 2 residents	2	0.1%	4	0.2%
Villa/Duplex/Townhouse, 1 resident	366	21.5%	366	14.1%
Villa/Duplex/Townhouse, 2 residents	72	4.2%	144	5.6%
Villa/Duplex/Townhouse, 3 residents	20	1.2%	60	2.3%
House, 2 residents	305	17.9%	610	23.6%
House, 3 residents	197	11.6%	591	22.8%
Group home, 4 residents	15	0.9%	60	2.3%
Group home, 5 residents	0	0	0	0
Total	1,702	100%	2,587	100%

Note: 1 place did not have a building type provided, and was removed from this analysis.

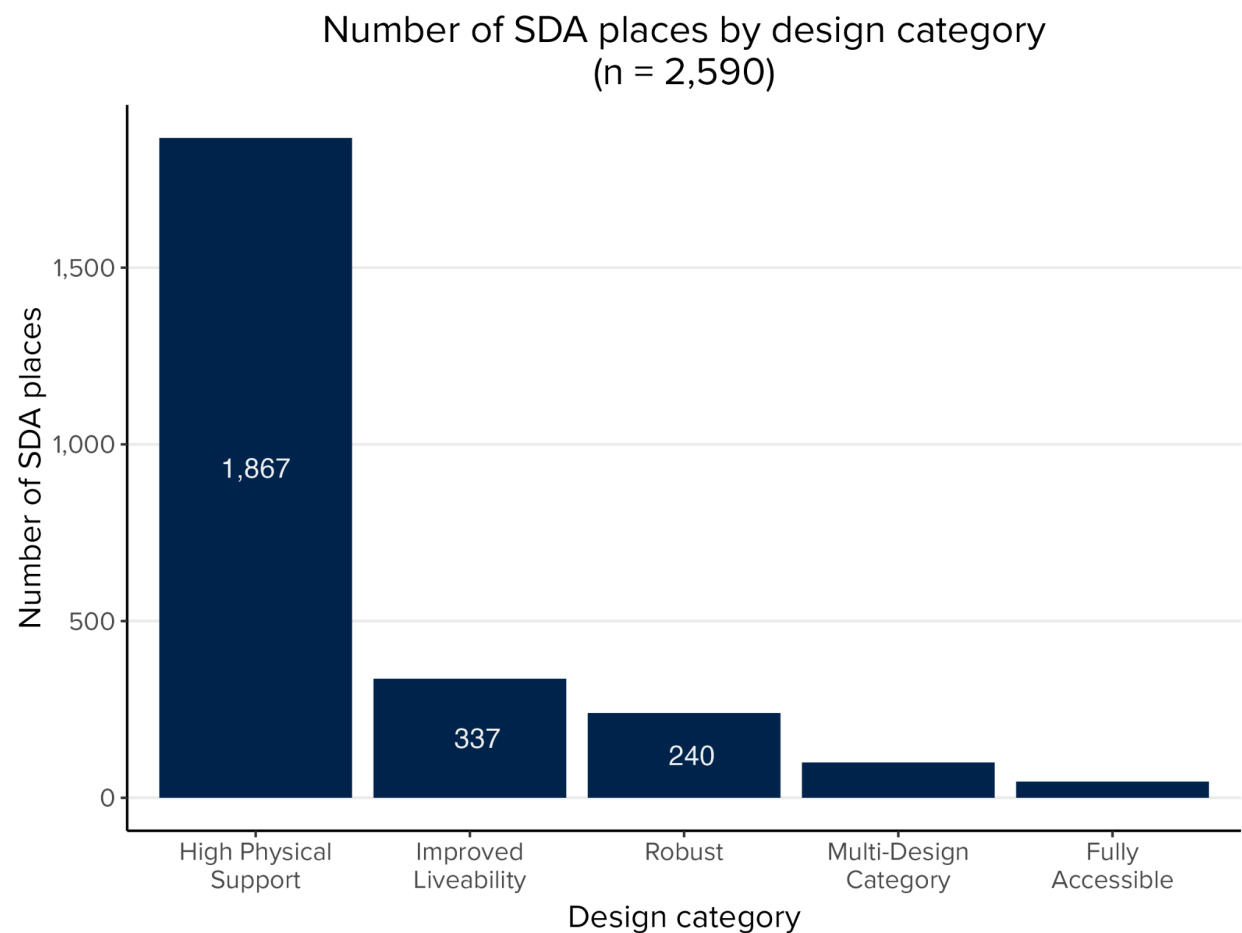
Design category

Just as there are different building types that SDA dwellings fit into, there are also 5 design categories that the dwellings are built to. These are High Physical Support,

Improved Liveability, Robust, Fully Accessible, and Multi-Design Category (any combination of the other categories). These are described in Appendix C.

Figure 9 demonstrates the prevalence of High Physical Support places (72.1%). Every other design category showed relatively low numbers in comparison, with Improved Liveability (13.0%) and Robust (9.3%) being the next highest. Multi-Design Category contributed 3.9% of places, while Fully Accessible only contributed 1.8%. The Multi-Design Category dwellings reported were often a combination of High Physical Support, Improved Liveability, and Fully Accessible, though High Physical Support and Robust was also a common combination.

Figure 9 - Estimated number of SDA places by design category across Australia



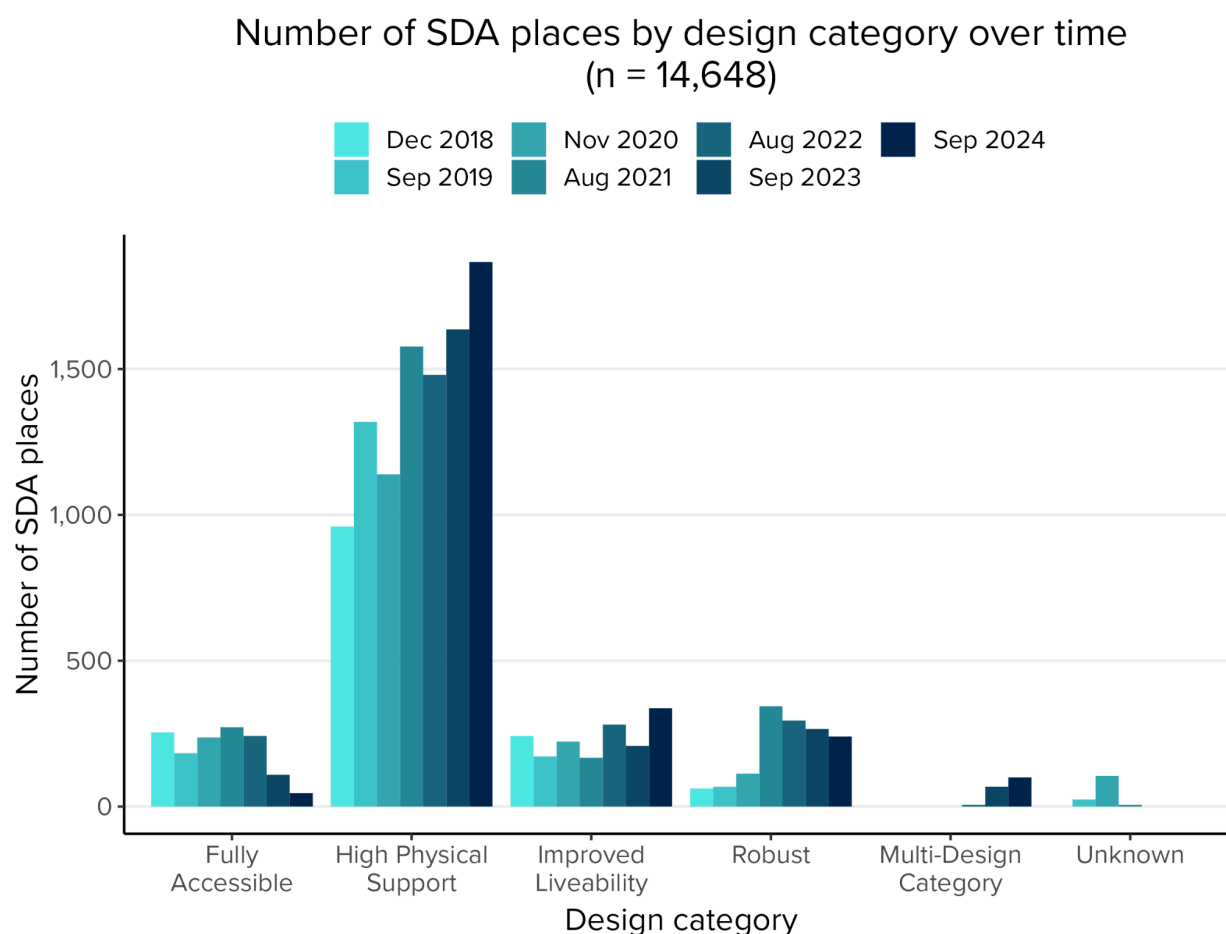
As has been the case in every year of this survey, High Physical Support places continued to be the most common, as shown in Figure 10. This is despite the decrease in pricing for High Physical Support apartments in the 2023 *SDA Pricing Review*.⁵⁵ This can

⁵⁵ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency, Exhibit 28. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

be attributed to High Physical Support being a more rigorous category, whereby High Physical Support dwellings can accommodate tenants with Improved Liveability or Fully Accessible funding. Fully Accessible and Robust places have continued a recent decreasing trend, while Improved Liveability fluctuates between decreases and increases. This year's increase could be a result of Improved Liveability pricing increasing in the *SDA Pricing Review*, but it would appear to be a relatively minor impact. Improved Liveability also has some uncertainty around whether it will continue to be a design category option for new builds, after a recommendation in the *NDIS Review* suggested its removal (Action 9.4).⁵⁶ Since their recent inclusion in the survey, Multi-Design Category places have continued to become more prevalent, as dwellings are designed to meet multiple categories to be able to accommodate a wide variety of NDIS participants with SDA funding.

⁵⁶ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS. Independent review into the National Disability Insurance Scheme: Final report*, Action 9.4. Downloaded 28 October 2024.
<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

Figure 10 - A comparison of SDA places in development by design category over time



Note: December 2018 (n = 1,518 places), September 2019 (n = 1,766 places), November 2020 (n = 1,817 places), August 2021 (n = 2,366 places), August 2022 (n = 2,304 places), September 2023 (n = 2,287 places), September 2024 (n = 2,590). The 'Multi-Design Category' was assessed for the first time in 2023's SDA supply survey and was not an available option in previous supply surveys. The 'Other' category from the 2022 Survey served the same purpose as 'Multi-Design Category', so the 6 places with the 'Other' category from the 2022 survey were included as 'Multi-Design Category'.

Even when breaking down design categories by jurisdiction, High Physical Support places are always the most common, highlighted in Figure 11 below. Of these, Western Australia showed the highest number. Improved Liveability places did have a notable presence in Victoria and South Australia, and New South Wales to a lesser extent. Robust places were most commonly from Victoria and New South Wales, while Multi-Design Category places were most commonly from New South Wales and South Australia.

Figure 11 - Estimated number of SDA places across design category for each jurisdiction
Number of SDA places by design category and jurisdiction
(n = 2,590)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Jurisdiction	NSW	14	417	67	78	51
	VIC	6	360	114	102	13
	QLD	1	422	29	29	0
	WA	11	467	21	11	6
	SA	13	144	106	16	30
	TAS	1	19	0	0	0
	ACT	0	24	0	0	0
	NT	0	14	0	4	0

Building type and design category

Reflecting the above sections on building type and design category, High Physical Support houses were the most common combination for pipeline places. Houses also showed the largest number of Improved Liveability and Multi-Design Category places. Robust places were most commonly in villas/duplexes/townhouses. Fully Accessible places were most commonly in apartments, though these numbers are low across all four building types, as can be seen in Figure 12.

Figure 12 - Estimated number of SDA places across building type and design category in Australia

Number of SDA places by building type and design category (n = 2,589)

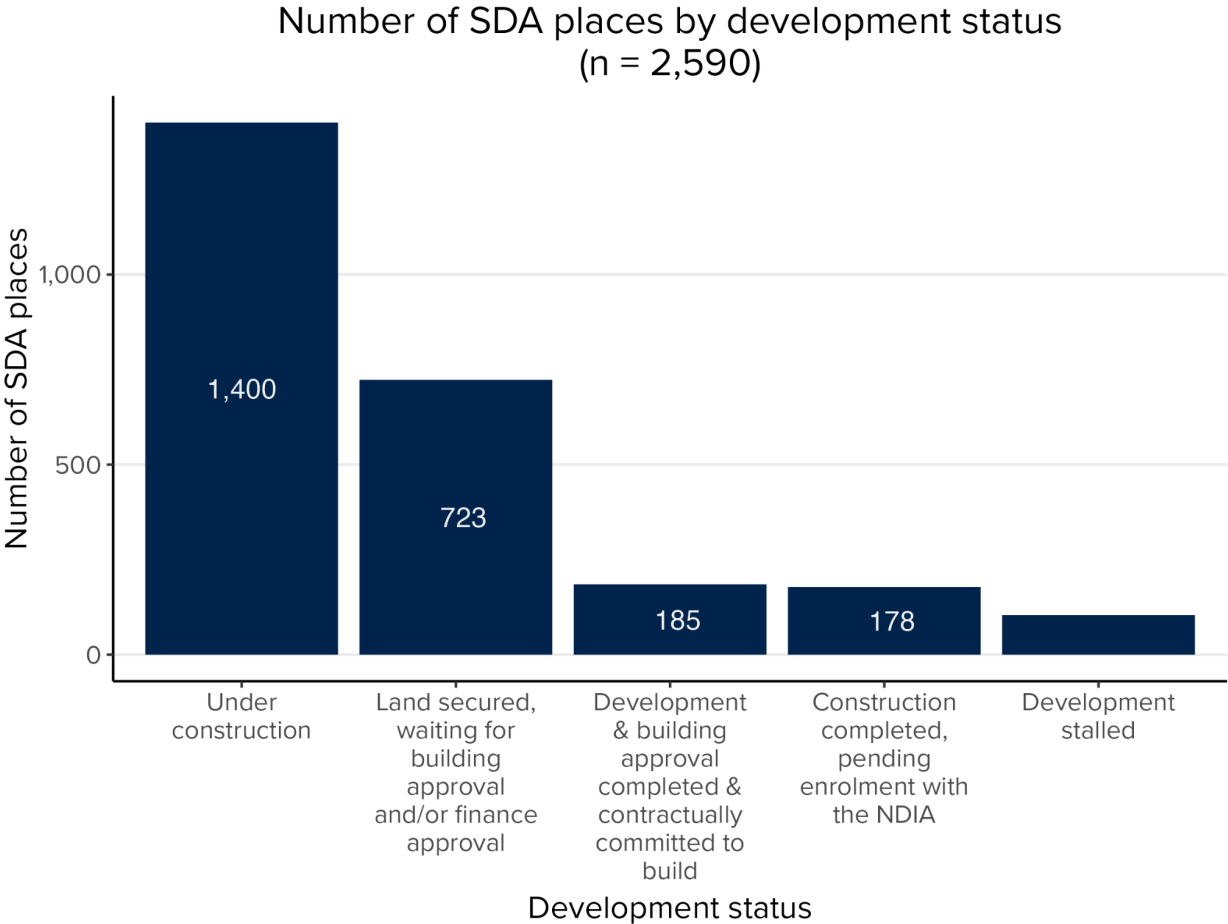
		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	19	675	55	0	9
	Villa/Duplex/Townhouse	7	346	65	123	29
	House	15	794	217	113	62
	Group Home	4	52	0	4	0

Note: The SDA Pricing and Payments guide does not allow Robust design in apartments. 1 place did not have a building type provided, and was removed from this analysis.

SDA development status

Dwellings in the pipeline can be at vastly different stages of development, ranging from land being secured to awaiting enrolment with the NDIA. Figure 13 shows the breakdown of what stage each pipeline place was reported to be in. Most places were in dwellings that were in the 'under construction' stage (54.1%), with the 'land secured, waiting for building approval and/or finance approval' stage having almost half as many places (27.9%). Much less common were places in the 'development & building approval completed & contractually committed to build' (7.1%) and 'construction completed, pending enrolment with the NDIA' (6.9%) stages. Positively, only 4.0% of places had stalled in their development.

Figure 13 - Estimated number of SDA places by development status in the sample

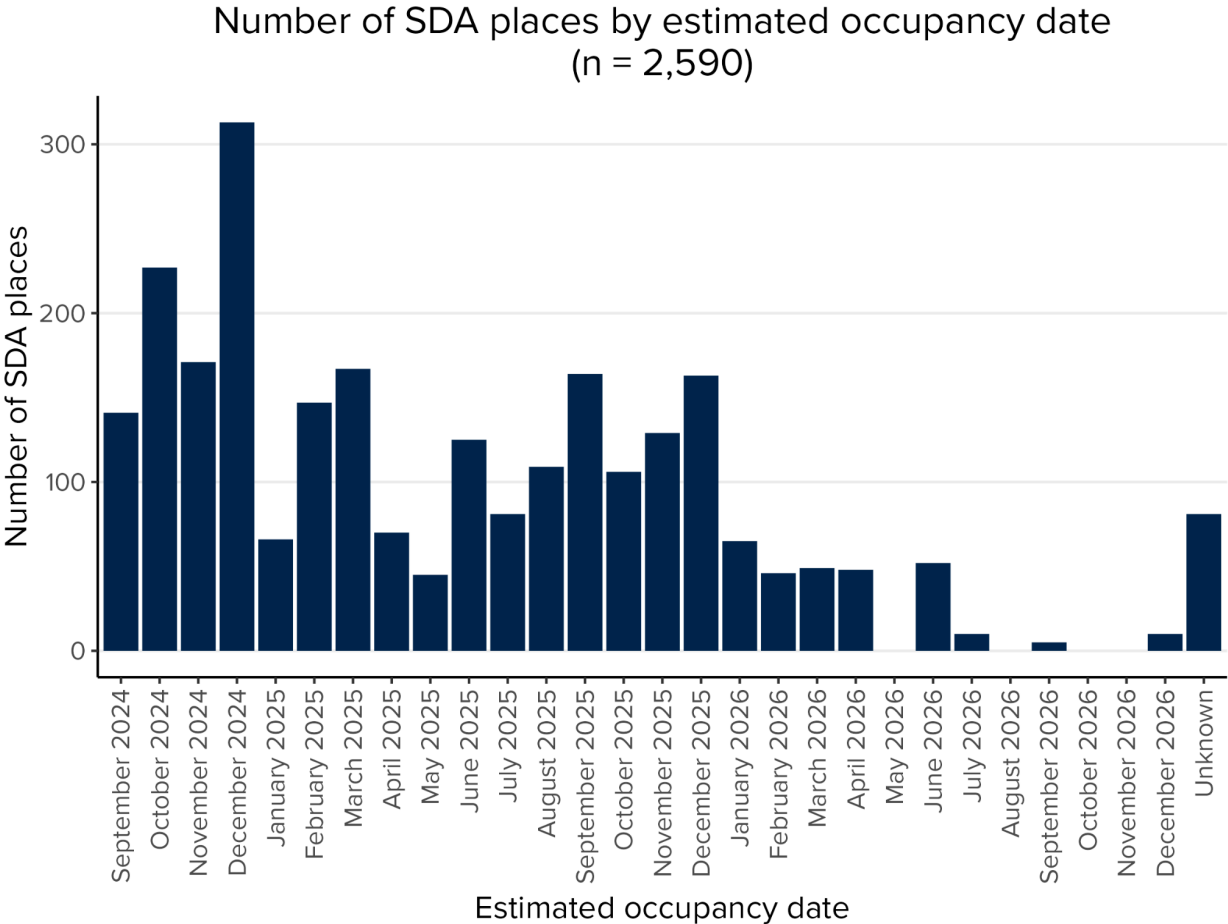


Note: 310 SDA places did not have development statuses provided, and were removed from all analyses in this report.

Estimated occupancy date

Figure 14 presents the dates the respondents estimated that their SDA places could be occupied by SDA participants. Approximately one third of the places will be ready for occupancy by December 2024 (32.9%). A further 53.0% of places are expected to be ready by the end of 2025, and 11.0% by 2026. The remaining 3.1% of places were classified as ‘unknown’ for estimated occupancy date. The ‘unknown’ classification was applied when the estimated date was in the past (earlier than September 2024, when the survey was completed; 1.1%), or was missing information for the occupancy month or year (2.0%).

Figure 14 - Estimated number of SDA places by estimated date of occupancy in Australia



Note: Date of occupancy was unknown for 81 SDA places. Date of occupancy was coded as 'unknown' when there was a missing month or year of estimated occupancy, or an estimated occupancy date that was earlier than September 2024. Estimated dates for occupancy should be viewed with caution as the occupancy dates for some SDA places were carried forward from the previous survey and may no longer be accurate due to development delays.

SDA supply pipeline: State and territory overview

The below sections provide an overview of the SDA pipeline in each state and territory in Australia.

New South Wales

In New South Wales, 488 dwellings with 627 places were reported to be under development. In line with the two previous iterations of the supply survey, the majority of developments were for High Physical Support Apartment places (224). See Figure 15.

Figure 15 - Estimated number of SDA places across building type and design category in New South Wales

		Number of SDA places by building type and design category in NSW (n = 627)				
Building type		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
	Apartment	10	224	47	0	2
	Villa/Duplex/Townhouse	1	86	16	51	27
	House	3	99	4	23	22
	Group Home	0	8	0	4	0

Almost half of all pipeline places were reported to be 'Under construction' (49.8%), This was followed by pipeline places under the development status of 'Land secured, waiting for building approval and/or finance approval' (36.2%). See Table 5.

Table 5 - Estimated number and percentage (%) of SDA dwellings and places by development status in New South Wales

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	147	30.1%	227	36.2%
Development & building approval completed & contractually committed to build	37	7.6%	54	8.6%
Under construction	278	57.0%	312	49.8%
Construction completed, pending enrolment with the NDIA	22	4.5%	26	4.1%
Development stalled	4	0.8%	8	1.3%
Unknown	0	0	0	0
Total	488	100%	627	100%

Victoria

A total of 384 dwellings with 595 places were reported to be in development in Victoria, representing an increase of more than 100 places from last year's SDA supply survey.

As can be seen in Figure 16, a large proportion (360 places; 60.5%) of this year's pipeline places were for High Physical Support dwellings. Interestingly, there has been a large increase in the number of places in Improved Liveability houses compared to last year's survey (105 places this year compared to 8 places last year). Improved Liveability houses now represent the third largest category in Victoria's pipeline.

Figure 16 - Estimated number of SDA places across building type and design category in Victoria

		Number of SDA places by building type and design category in VIC (n = 595)				
Building type		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
	Apartment	0	126	1	0	7
	Villa/Duplex/Townhouse	3	87	8	56	0
	House	3	143	105	46	6
	Group Home	0	4	0	0	0

As shown in Table 6, a little more than half (51.1%) of the pipeline places in Victoria were under construction at the time of this year's SDA supply survey. This was followed by approximately a quarter of places (28.6%) for which the provider had secured land and was awaiting building and/or finance approval.

Table 6 - Estimated number and percentage (%) of SDA dwellings and places by development status in Victoria

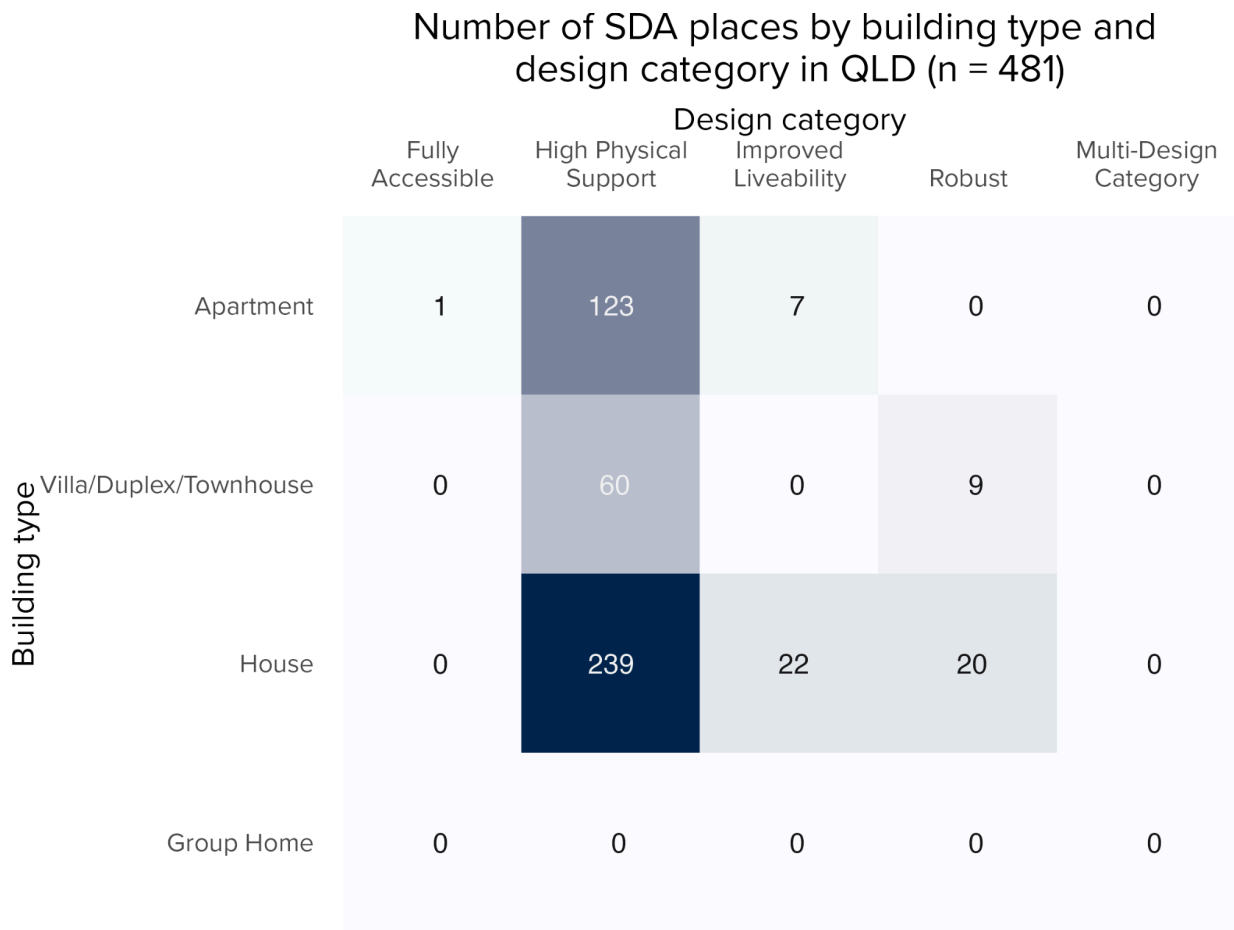
Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	75	19.5%	170	28.6%
Development & building approval completed & contractually committed to build	26	6.8%	36	6.1%
Under construction	221	57.6%	304	51.1%
Construction completed, pending enrolment with the NDIA	30	7.8%	43	7.2%
Development stalled	32	8.3%	42	7.1%
Unknown	0	0%	0	0%
Total	384	100%	595	100%*

**Due to rounding, some percentages did not add up to 100% exactly. For convenience, the totals are presented as 100%*

Queensland

There were 481 places across 309 dwellings reported to be in the pipeline in Queensland. This is a slight increase in the reported pipeline places, compared to 2023 (371 places). Figure 17 shows that almost half of the places being developed were for houses in the High Physical Support category (239 places). The next two most common types of developments were also from the High Physical Support category, being apartments (123 places) and villas/duplexes/townhouses (60 places).

Figure 17 - Estimated number of SDA places across building type and design category in Queensland



‘Under construction’ was the most common development status for Queensland developments, with more than half of pipeline placements being in this stage (52.8%), echoing the previous two years’ surveys. ‘Land secured, waiting for building approval and/or finance approval’ was the next most common status (21.0%), with almost identical proportions of places at the ‘Construction completed, pending enrolment with the NDIA’

(10.0%) and 'Development & building approval completed & contractually committed to build' (9.6%) stages. This is shown in Table 7.

Table 7 - Estimated number and percentage (%) of SDA dwellings and places by development status in Queensland

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	56	18.1%	101	21.0%
Development & building approval completed & contractually committed to build	33	10.7%	46	9.6%
Under construction	162	52.4%	254	52.8%
Construction completed, pending enrolment with the NDIA	35	11.3%	48	10.0%
Development stalled	23	7.4%	32	6.7%
Unknown	0	0%	0	0%
Total	309	100%*	481	100%*

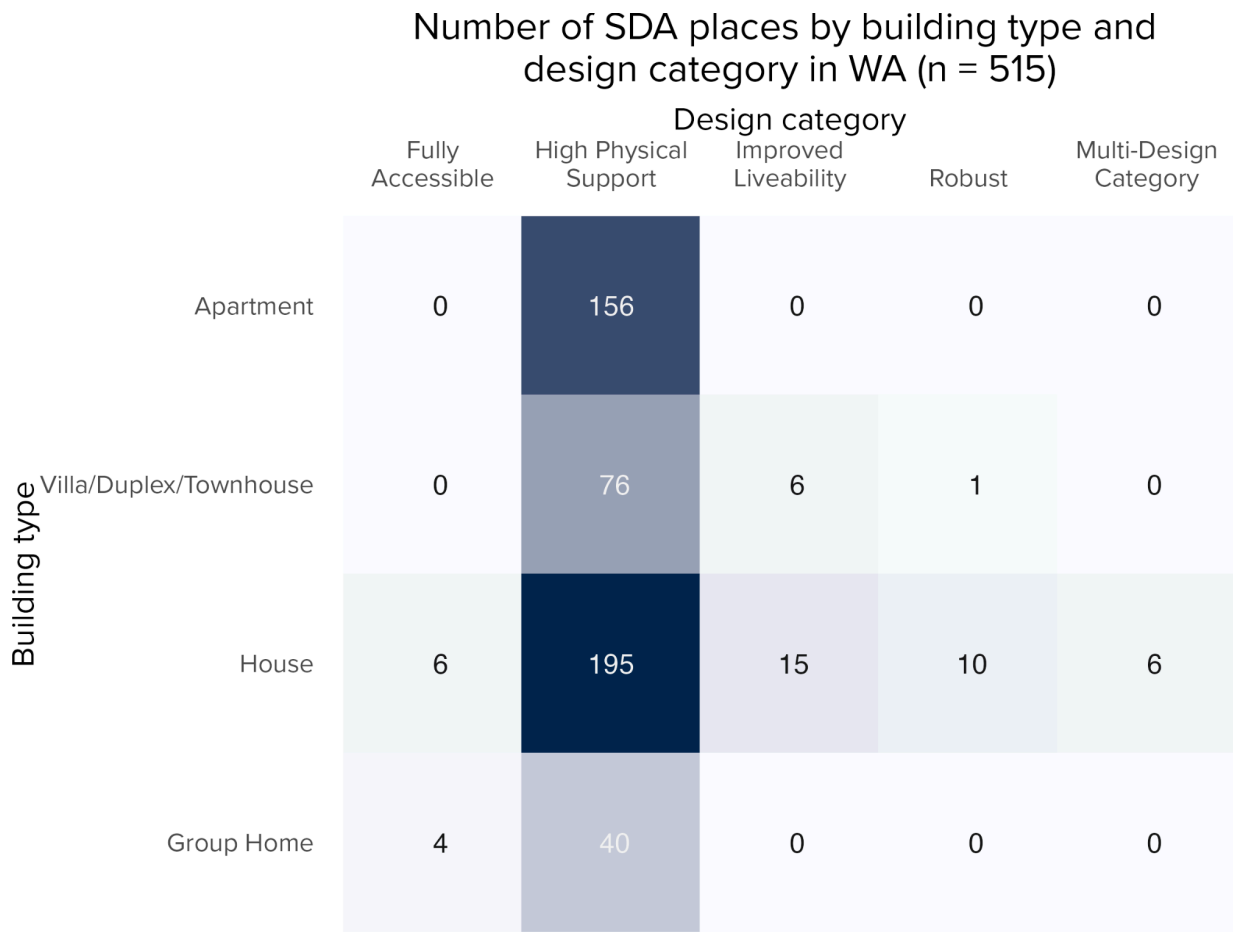
**Due to rounding, some percentages did not add up to 100% exactly. For convenience, the totals are presented as 100%.*

Western Australia

The number of places being developed in Western Australia in 2024 did not reach the same heights as in last year’s survey. This year, there were 516 places over 313 dwellings, compared to last year’s 641 places over 477 dwellings. Though fewer compared to last year, Western Australia’s number of pipeline places still secured its position as the jurisdiction with the third largest number of places in development.

Compared to last year, there were not as many High Physical Support apartment places in development (156 places versus last year’s 376 places), however, the number of High Physical Support house places almost doubled (195 places versus last year’s 100 places). Consistent with the rest of Australia, High Physical Support was the most common design category, with 76 places being developed in villas/duplexes/townhouses and 40 places in group homes. This breakdown is shown in Figure 18.

Figure 18 - Estimated number of SDA places across building type and design category in Western Australia



Note: 1 place did not have a building type provided, and was removed from this analysis.

As seen in Table 8, the majority of pipeline places in Western Australia were in the 'Under construction' stage (73.8%), a notably larger proportion than last year (46.8%). Those at the 'Land secured, waiting for building approval and/or finance approval' stage were the next most common (11.8%), though this is a large reduction compared to last year (34.2%). Many more places were in the 'Construction completed, pending enrolment with the NDIA' stage this year (8.1%) than last year (1.4%). It appears as though many of the places that were in the early stages of development have progressed to construction and post-construction.

Table 8 - Estimated number and percentage (%) of SDA dwellings and places by development status in Western Australia

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	28	8.9%	61	11.8%
Development & building approval completed & contractually committed to build	13	4.2%	32	6.2%
Under construction	242	77.3%	381	73.8%
Construction completed, pending enrolment with the NDIA	30	9.6%	42	8.1%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
Total	313	100%	516	100%*

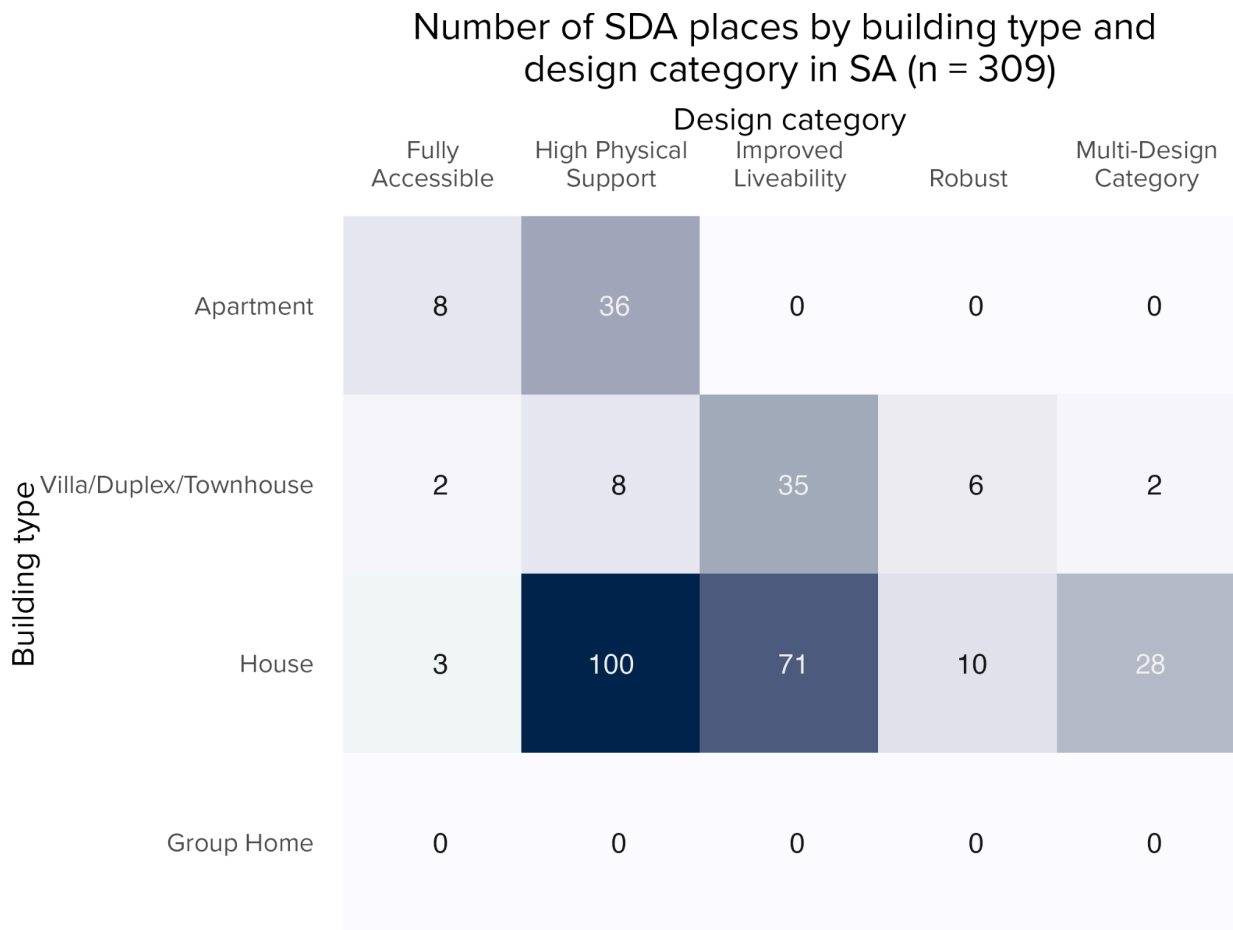
**Due to rounding, some percentages did not add up to 100% exactly. For convenience, the totals are presented as 100%.*

South Australia

In South Australia, 171 SDA dwellings offering a total of 307 places were reported to be in the pipeline, which demonstrates an increase in pipeline activity compared to last year’s survey.

As shown in Figure 19, the pipeline in South Australia predominantly consists of houses in the High Physical Support (100 places) and Improved Liveability (71 places) design categories. The large number of places in Improved Liveability houses represents a notable increase from last year’s survey, in which Improved Liveability houses comprised only 7 pipeline places.

Figure 19 - Estimated number of SDA places across building type and design category in South Australia



Half of the pipeline places (50.5%) in South Australia were in the first stage of the development cycle (‘Land secured, waiting for building approval and/or finance approval’). This was followed by approximately a third of places (34.0%) that were under construction at the time of the survey. See Table 9.

Table 9 - Estimated number and percentage (%) of SDA dwellings and places by development status in South Australia

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	74	43.3%	156	50.5%
Development & building approval completed & contractually committed to build	7	4.1%	11	3.6%
Under construction	63	36.8%	105	34.0%
Construction completed, pending enrolment with the NDIA	13	7.6%	17	5.5%
Development stalled	14	8.2%	20	6.5%
Unknown	0	0%	0	0%
Total	171	100%	307	100%*

**Due to rounding, some percentages did not add up to 100% exactly. For convenience, the totals are presented as 100%.*

Tasmania

In Tasmania, a total of 12 dwellings with 20 places were in the pipeline, which is comparable to the pipeline activity in last year’s survey. Similar to last year, almost all (15 places; 75.0%) of Tasmania’s pipeline places were for High Physical Support villas/duplexes/townhouses (see Figure 20).

Figure 20 - Estimated number of SDA places across building type and design category in Tasmania

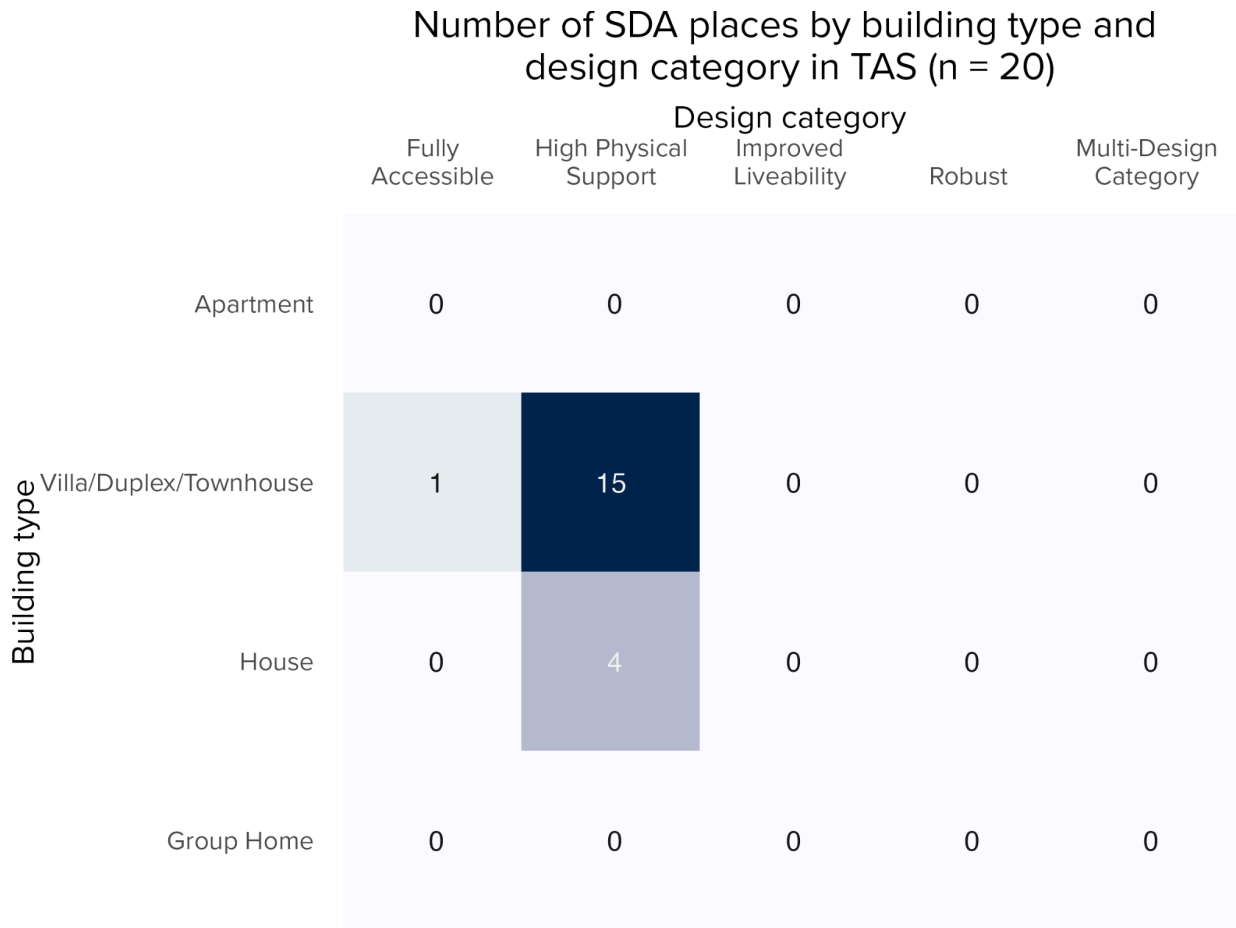


Table 10 shows that the pipeline places in Tasmania were predominantly spread across three different development statuses: ‘Land secured, waiting for building and/or land approval’ was the most common development status (40.0%), followed by ‘Development & building approval completed & contractually committed to build’ (30.0%) and ‘Under construction’ (20.0%). There were also 2 places (10.0%) for which development had stalled. This differs strongly from last year’s survey, in which almost all pipeline places were still in the first stage of the development cycle (‘Land secured’).

Table 10 - Estimated number and percentage (%) of SDA dwellings and places by development status in Tasmania

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	4	33.3%	8	40.0%
Development & building approval completed & contractually committed to build	4	33.3%	6	30.0%
Under construction	2	16.7%	4	20.0%
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Development stalled	2	16.7%	2	10.0%
Unknown	0	0%	0	0%
Total	12	100%	20	100%

Australian Capital Territory

In the Australian Capital Territory, 17 dwellings with 24 places were reported to be under development. As per Figure 21, the pipeline in the Australian Capital Territory consisted of 14 High Physical Support Villa/Duplex/Townhouse places, and 10 High Physical Support Apartment places.

Figure 21 - Estimated number of SDA places across building type and design category in the Australian Capital Territory

Number of SDA places by building type and design category in ACT (n = 24)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	0	10	0	0	0
	Villa/Duplex/Townhouse	0	14	0	0	0
	House	0	0	0	0	0
	Group Home	0	0	0	0	0

As can be seen in Table 11, almost all pipeline places in the Australian Capital Territory were reported to be 'Under construction' (91.7%). The remaining proportion of pipeline places (8.3%) were reported to be at the 'Construction completed, pending enrollment with the NDIA' stage.

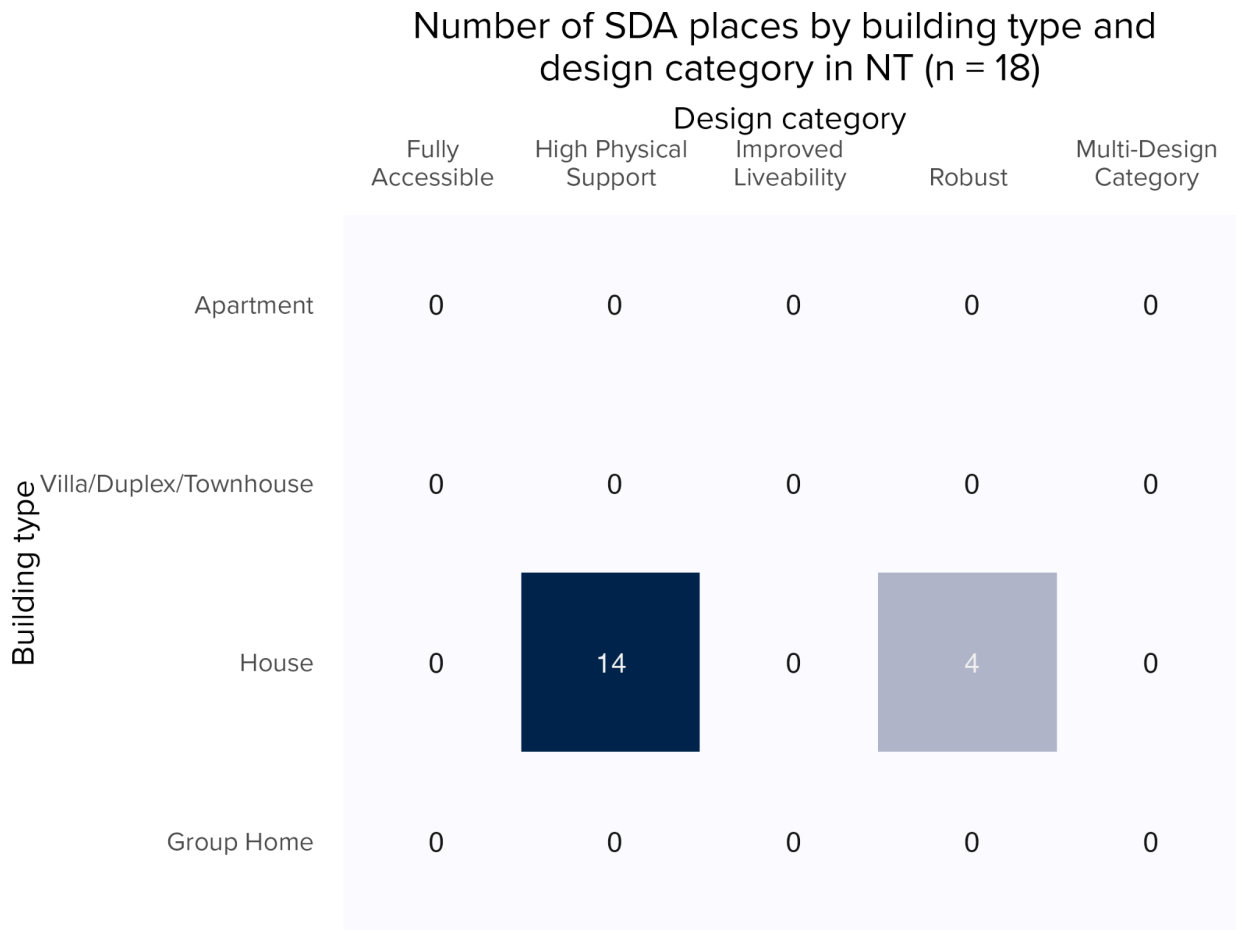
Table 11 - Estimated number and percentage (%) of SDA dwellings and places by development status in the Australian Capital Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	0	0%	0	0%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Under construction	16	94.1%	22	91.7%
Construction completed, pending enrolment with the NDIA	1	5.9%	2	8.3%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
Total	17	100%	24	100%

Northern Territory

Similar to the previous two iterations of the Supply Survey, 9 dwellings with 18 places were reported to be under development in the Northern Territory. As shown in Figure 22, the pipeline in the Northern Territory consisted of 14 places in High Physical Support Houses and 4 places in Robust Houses.

Figure 22 - Estimated number of SDA places across building type and design category in the Northern Territory



All of the pipeline places being developed in the Northern Territory were reported to be at the 'Under construction' stage. See Table 12.

Table 12 - Estimated number and percentage (%) of SDA dwellings and places by development status in the Northern Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	0	0%	0	0%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Under construction	9	100%	18	100%
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
TOTAL	9	100%	18	100%

SA4 regions and NDIA data

The pipeline places have been sorted into their Statistical Area Level 4 (SA4) regions⁵⁷ and combined with the NDIA's reported data on enrolled dwellings by SA4 region, as of 30 June 2024.⁵⁸ For the NDIA's data, it is important to note that the number of places are only estimated, due to Legacy dwellings not having their exact number of places specified. Instead, they are reported as having '6+' places. For the purposes of this report, they are considered to contain 6 places each, though the true number of places per dwelling could be greater. Without certainty on these numbers, the following results need to be interpreted with respect to this. A total of 72 of the 87 SA4 regions in Australia were represented in the pipeline survey data this year.

NDIA notification status

When asked whether the NDIA had been notified about the pipeline places being developed, respondents indicated that the NDIA had not been notified about 40.6% of them, and were uncertain as to whether another 22.8% (as shown in Figure 23). This highlights the unique data presented in this report, beyond the NDIA's data on unenrolled places (before enrollment).

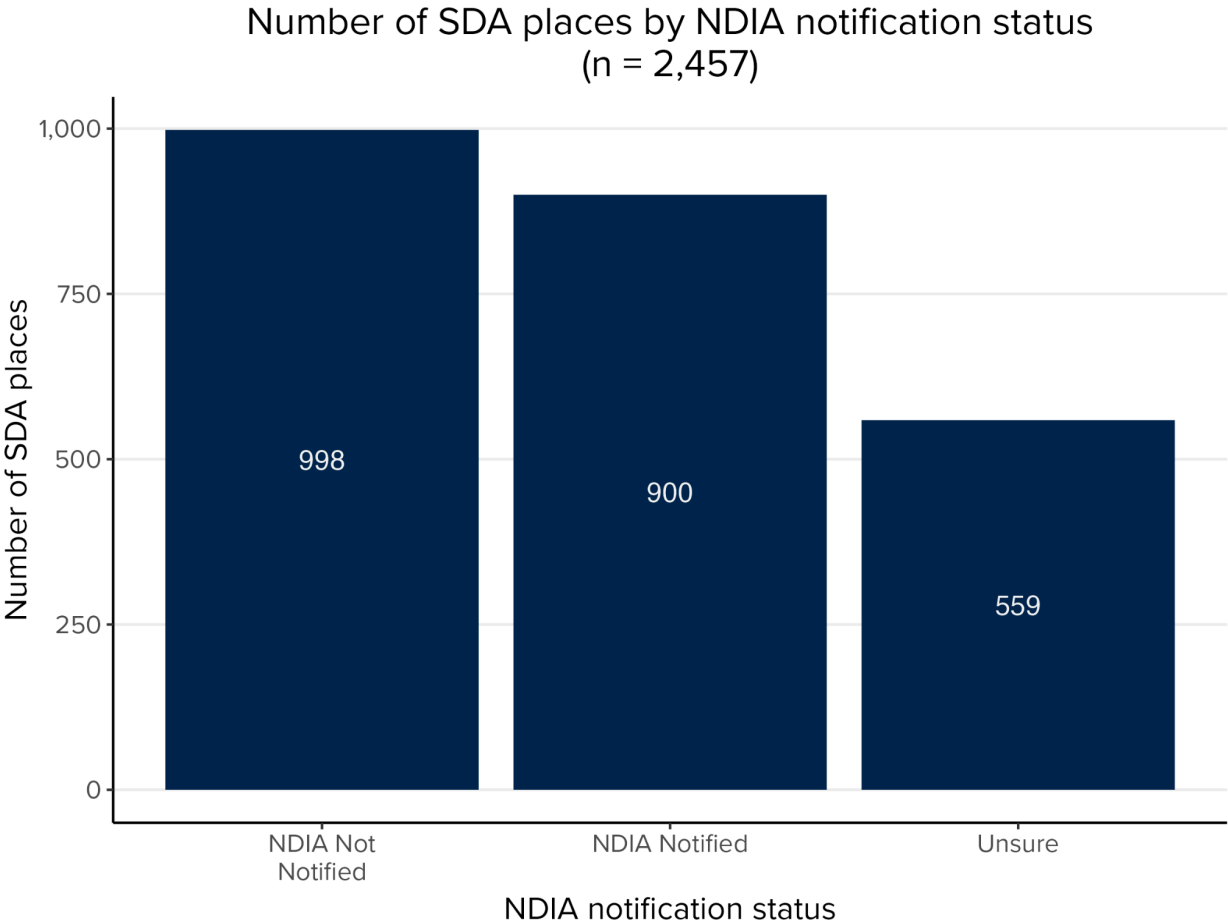
⁵⁷ SA4 regions are a part of the Australian Statistical Geography Standard and are the next largest grouping of regions in Australia below the state level. They are based on the population and labour markets of the area. The NDIA currently uses the 2016 edition of the Australian Statistical Geography Standard, so the pipeline data have been categorised using the 2016 SA4 regions. The Australian Bureau of Statistics details the 2016 edition of the SA4 regions on their website:

[https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/1270.0.55.001~July%202016~Main%20Features~Statistical%20Area%20Level%204%20\(SA4\)~10016](https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/1270.0.55.001~July%202016~Main%20Features~Statistical%20Area%20Level%204%20(SA4)~10016)

⁵⁸ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P, Tables P.11 and P.12. Downloaded 28 October 2024.

<https://dataresearch.ndis.gov.au/media/4040/download?attachment>

Figure 23 - Estimated number of SDA places by NDIA notification status in the sample



Note: 133 places did not have data for NDIA notification, and were removed from this analysis.

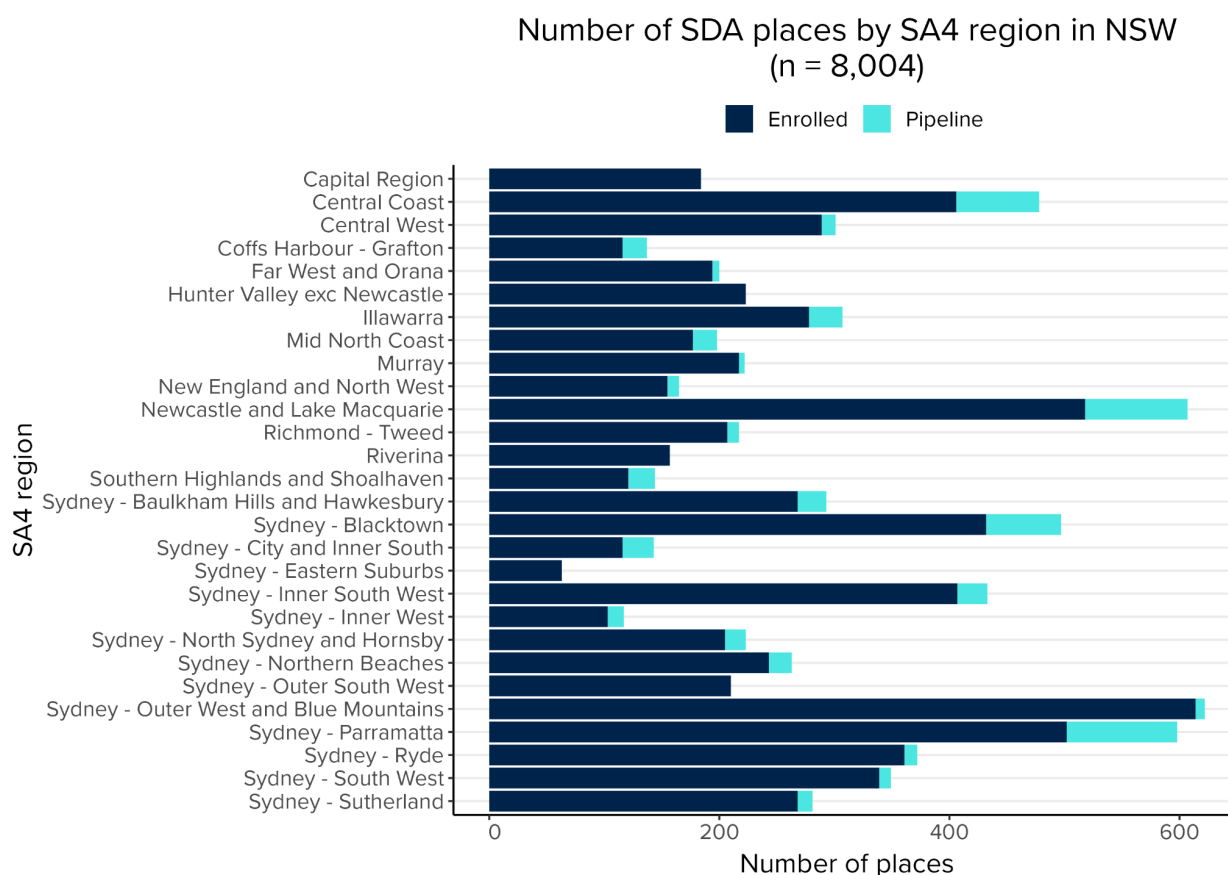
New South Wales

The numbers of SDA places in New South Wales across the state's SA4 regions are shown in Figure 24. The SA4 region with the largest number of SDA pipeline places was 'Sydney - Parramatta' (96), followed by 'Newcastle and Lake Macquarie' (89), and 'Central Coast' (72).

Similar to the last iteration of the survey, 'Capital Region', 'Hunter Valley exc Newcastle', 'Riverina', 'Sydney - Eastern Suburbs', and 'Sydney - Outer South West' did not have any pipeline places in development. Previously, 'Sydney - Inner West' did not have any pipeline places in development however this year there were 14 places reported.

In terms of total SDA places (both enrolled and pipeline), 'Sydney - Outer West and Blue Mountains' had the most places (622), followed by 'Newcastle and Lake Macquarie' (607), and 'Sydney - Parramatta' (598).

Figure 24 - Estimated SDA places in New South Wales



Note: The NDIA reports Legacy stock as having 6+ places - these dwellings were counted as having 6 places in the current report. Therefore, the estimated number of

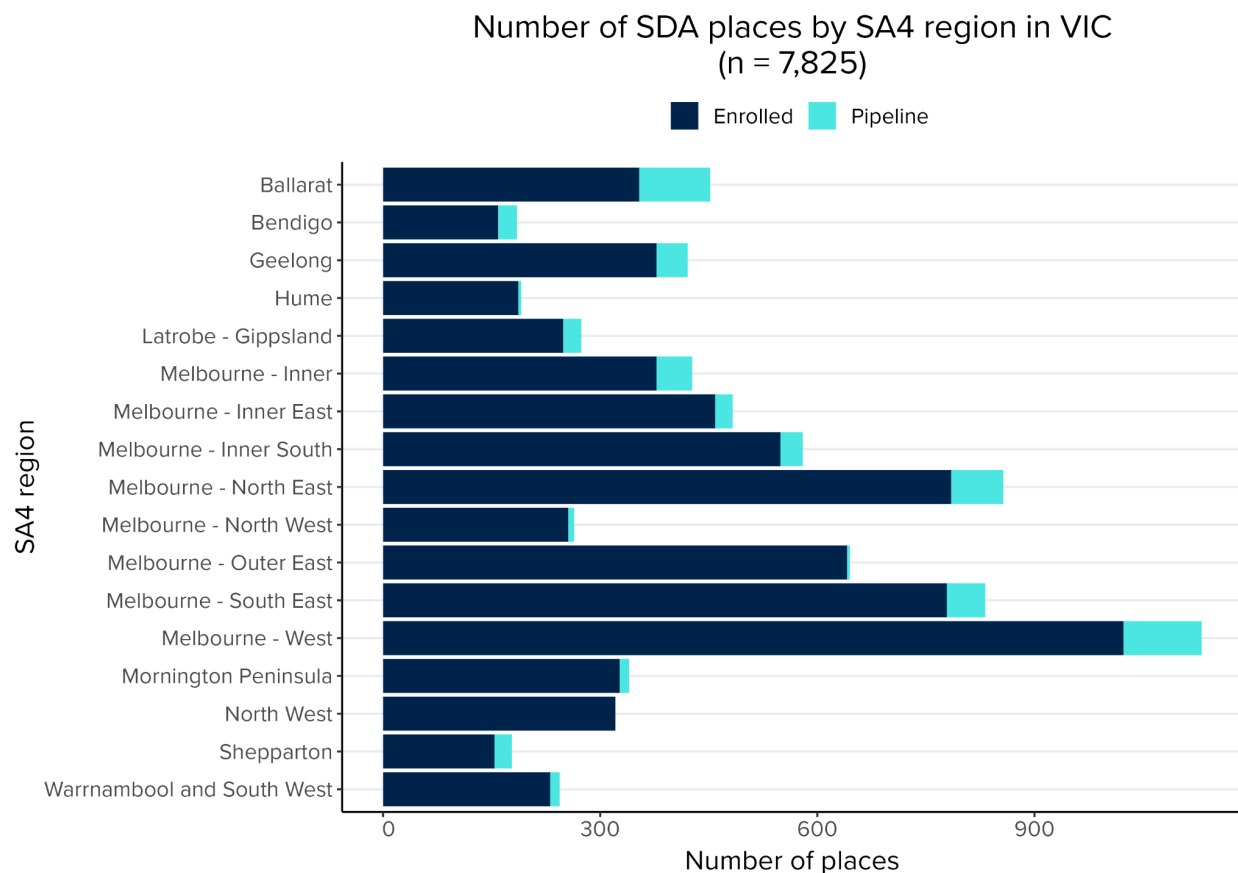
places should be interpreted as the minimum estimated supply and needs to be interpreted with caution.

Victoria

The number of pipeline places and enrolled places across the different SA4 regions in Victoria are shown in Figure 25. All SA4 regions in Victoria were reported to have SDA places in development, except for 'North West'. The largest number of pipeline places were observed in 'Melbourne - West' (108 places) and Ballarat (98 places.)

When combined with the number of places already enrolled with the NDIA, the SA4 regions with the most SDA places were 'Melbourne - West' (1,131 places), 'Melbourne - North East' (857 places), and 'Melbourne - South East' (832 places). This mirrors the trends observed in last year's SDA supply survey.

Figure 25 - Estimated SDA places in Victoria (VIC)



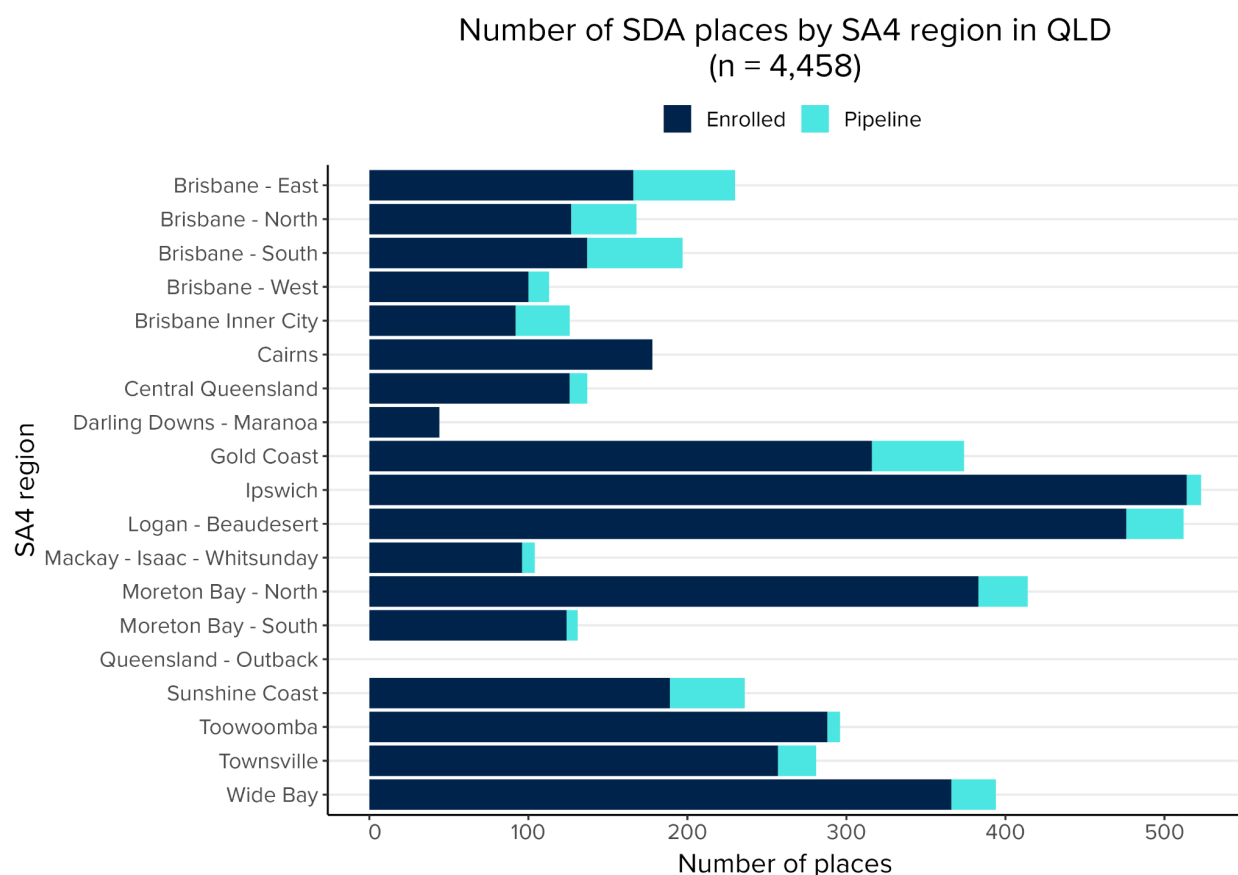
Note: The NDIA reports Legacy stock as having 6+ places - these dwellings were counted as having 6 places in the current report. Therefore, the estimated number of places should be interpreted as the minimum estimated supply and needs to be interpreted with caution.

Queensland

The number of enrolled and pipeline places in Queensland's SA4 regions are represented in Figure 26. 'Brisbane - East' contained the largest number of pipeline places (64), followed by 'Brisbane - South' (60), 'Gold Coast' (58), and 'Sunshine Coast' (47). 'Gold Coast' and 'Sunshine Coast' show notably greater numbers of pipeline places compared to last year, while 'Townsville' shows notably fewer, as they have achieved enrolment. 'Queensland - Outback' continues to have no enrolled or pipeline places.

'Ipswich' (523 places) and 'Logan - Beaudesert' (512 places) have the highest counts for total places, followed by 'Moreton Bay - North' (414 places), 'Wide Bay' (394 places), and 'Gold Coast' (374 places).

Figure 26 - Estimated SDA places in Queensland (QLD)



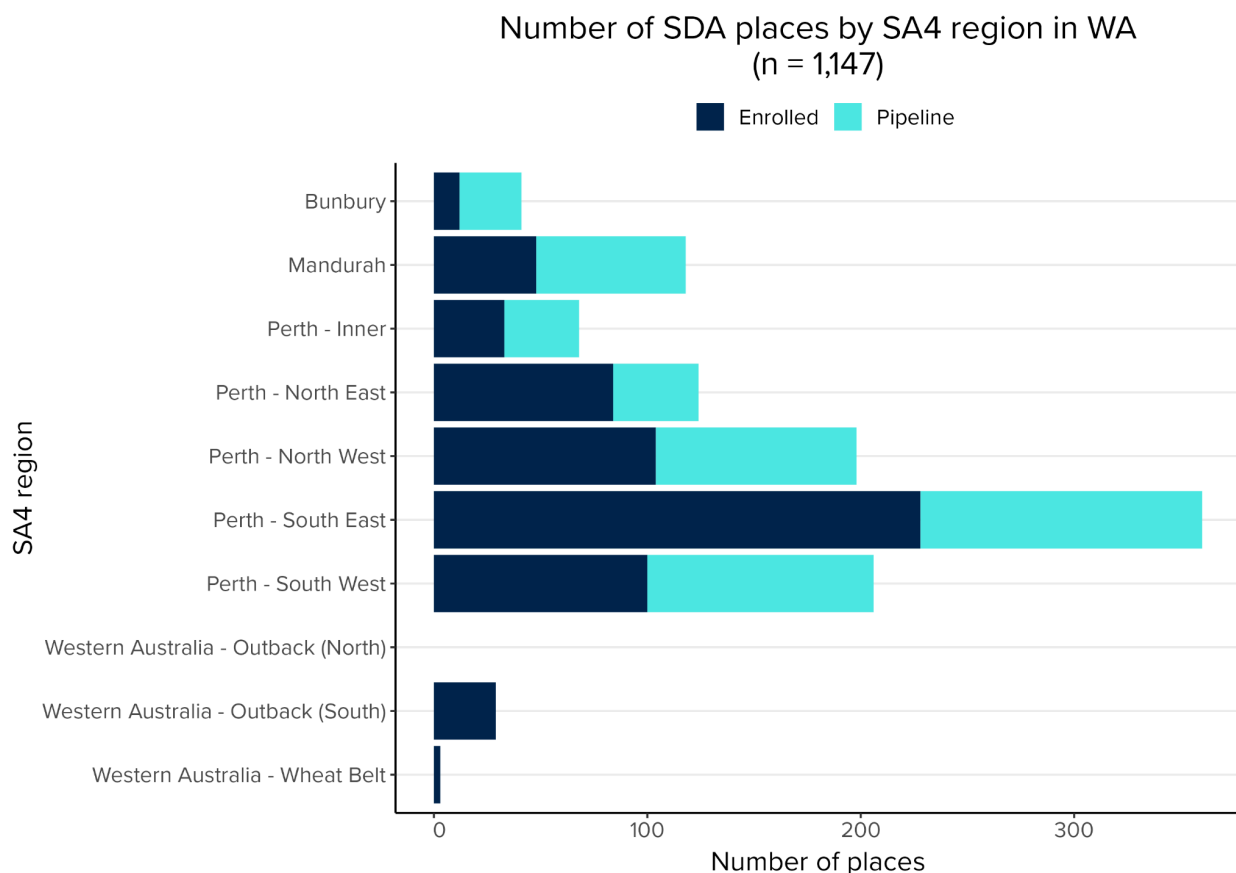
Note: The NDIA reports Legacy stock as having 6+ places - these dwellings were counted as having 6 places in the current report. Therefore, the estimated number of places should be interpreted as the minimum estimated supply and needs to be interpreted with caution.

Western Australia

Figure 27 displays the number of enrolled and pipeline places across the SA4 regions in Western Australia. Pipeline places were most prevalent in Perth, specifically in the ‘Perth - South East’ (132 places), ‘Perth - South West’ (106 places), and ‘Perth - North West’ (94 places) regions. The regions that encompass most of rural Western Australia (‘Western Australia - Outback (North)’, ‘Western Australia - Outback (South)’, and ‘Western Australia - Wheat Belt’) did not have any places in development.

For total SDA places, the same 3 regions had the most (‘Perth - South East’ with 360 places, ‘Perth - South West’ with 206 places, and ‘Perth - North West’ with 198 places). Only ‘Western Australia - Outback (North)’ had no SDA places, though ‘Western Australia - Wheat Belt’ only had 3.

Figure 27 - Estimated SDA places in Western Australia (WA)



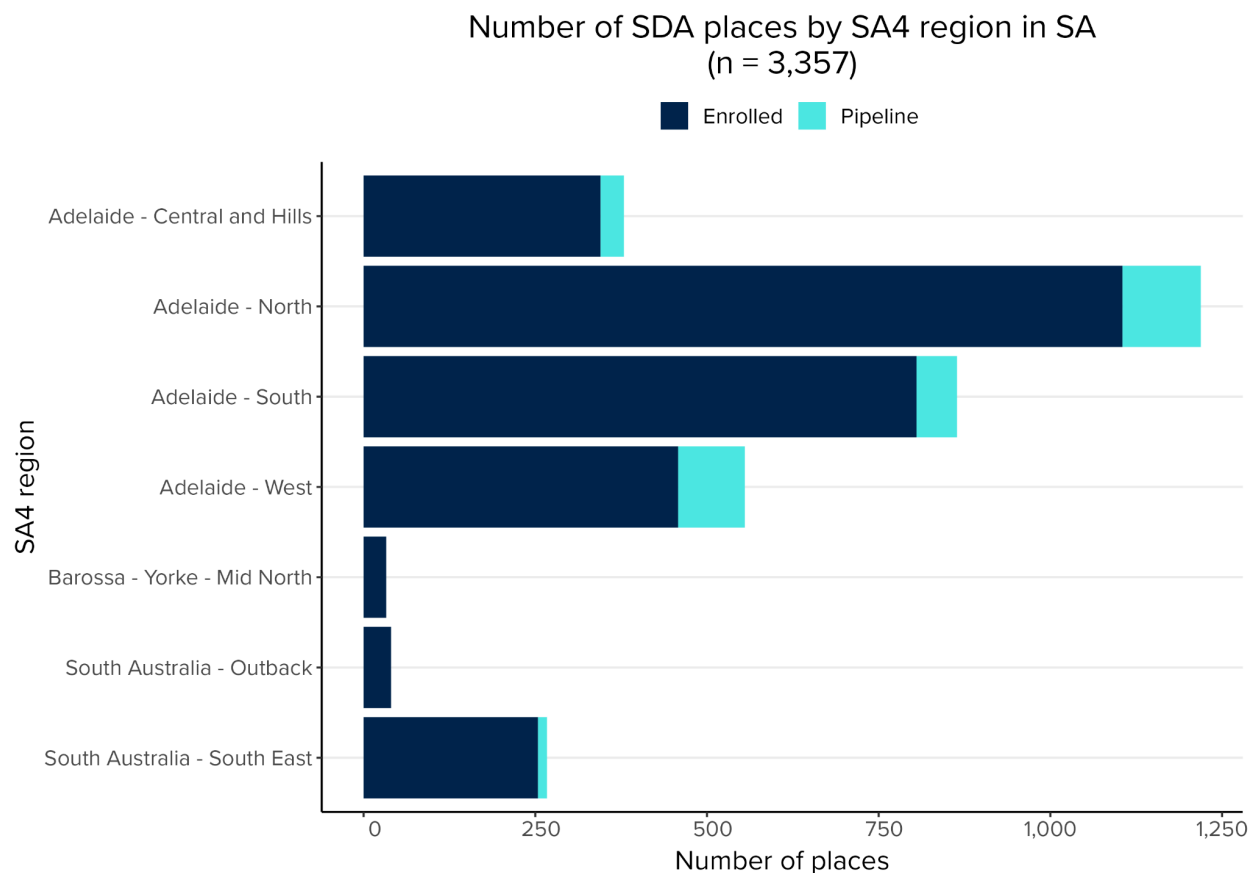
Note: The NDIA reports Legacy stock as having 6+ places - these dwellings were counted as having 6 places in the current report. Therefore, the estimated number of places should be interpreted as the minimum estimated supply and needs to be interpreted with caution.

South Australia

Figure 28 shows the number of enrolled and pipeline SDA places across South Australia's SA4 regions. In South Australia, the SA4 regions with the greatest number of pipeline places were 'Adelaide - North' (114 places) and 'Adelaide - West' (97 places). Two SA4 regions ('Barossa - Yorke - Mid North' and 'South Australia - Outback') had no pipeline developments.

The SA4 region with the largest total number of projected SDA places (pipeline and enrolled places) was 'Adelaide - North' (1,219 places). This was followed, although with a noticeable gap, by 'Adelaide - South' (864 places).

Figure 28 - Estimated SDA places in South Australia (SA)



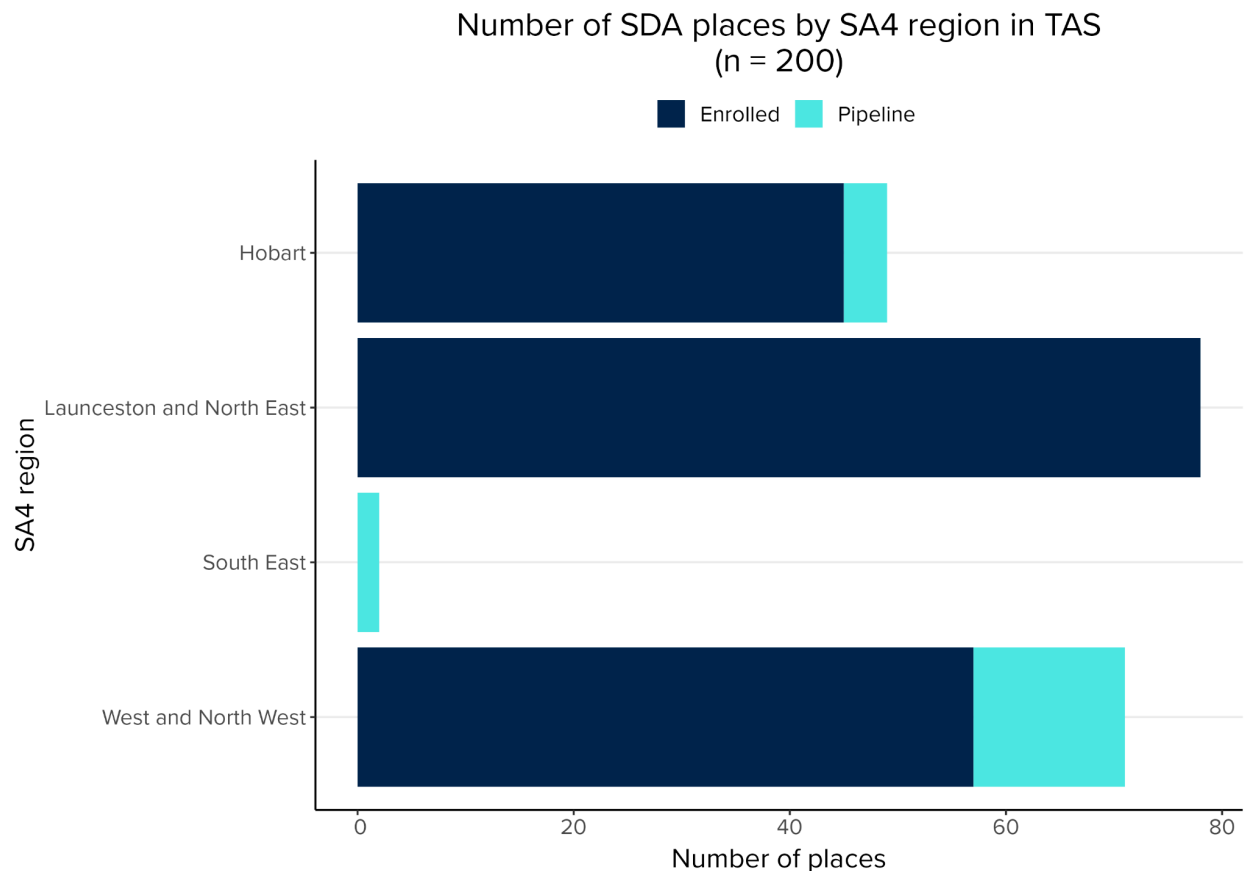
Note: The NDIA reports Legacy stock as having 6+ places - these dwellings were counted as having 6 places in the current report. Therefore, the estimated number of places should be interpreted as the minimum estimated supply and needs to be interpreted with caution.

Tasmania

The number of SDA places across Tasmania's SA4 regions are reported in Figure 29. Similar to last year, the majority of the pipeline places in Tasmania are concentrated in one SA4 region: 'West and North West' (14 places; 70.0%). 'Hobart' and 'South East' were reported to have much less development activity and 'Launceston and North East' had no SDA places in development.

Although 'Launceston and North East' had no SDA places in development, it is currently the SA4 region with the largest projected supply of SDA places (78 places) when taking into account SDA places that are already enrolled with the NDIA. This was followed by 'West and North West' with 71 places and 'Hobart' with 49 places. It is important to note that the distribution of the total projected SDA supply (pipeline places and enrolled places) appears very different to what was presented in last year's survey, as the NDIA has now phased out in-kind SDA dwellings in Tasmania.

Figure 29 - Estimated SDA places in Tasmania (TAS)



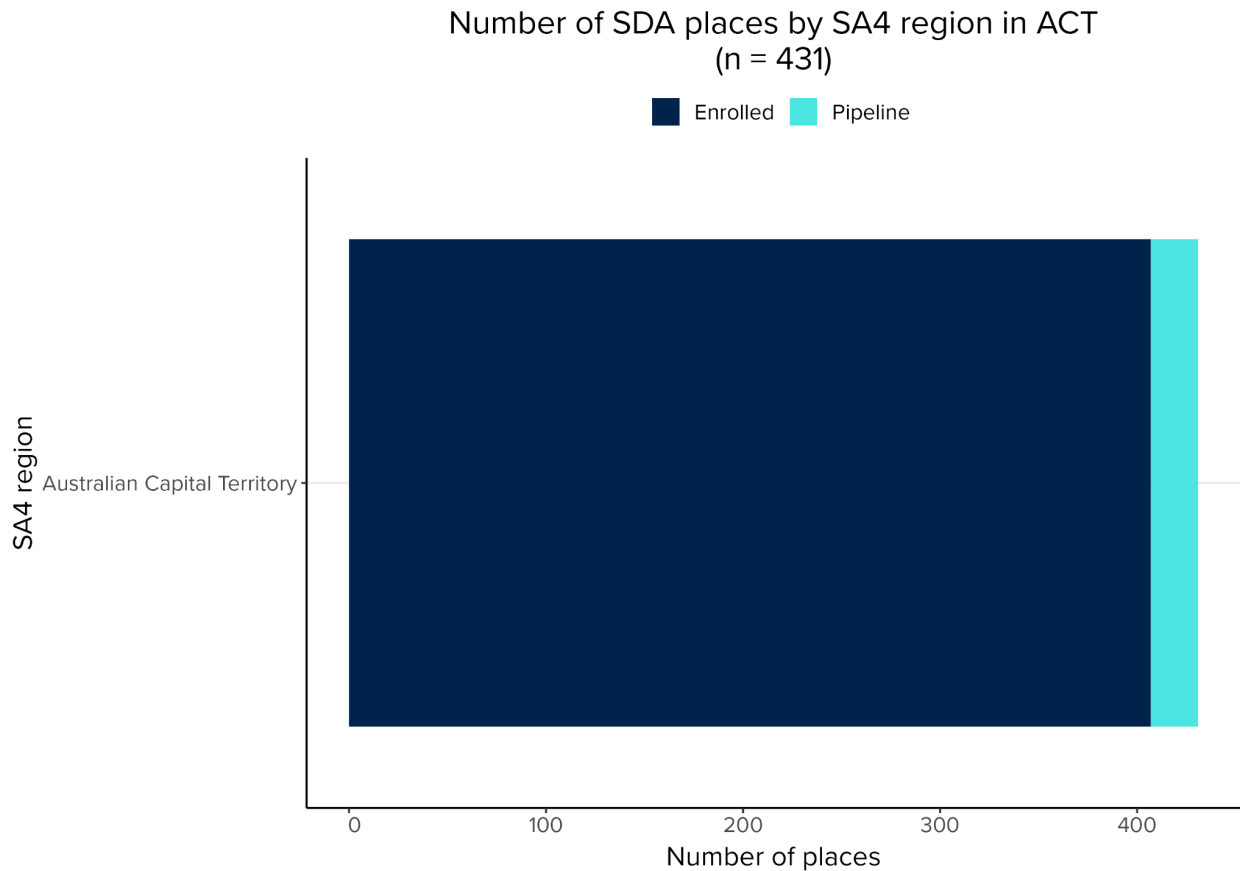
Note: The NDIA reports Legacy stock as having 6+ places - these dwellings were counted as having 6 places in the current report. Therefore, the estimated number of

places should be interpreted as the minimum estimated supply and needs to be interpreted with caution.

Australian Capital Territory

For the Australian Capital Territory, SDA places are shown in Figure 30. Comparable to data from last year, there were 24 pipeline places in development and 431 total places overall (enrolled and pipeline combined).

Figure 30 - Estimated SDA places in the Australian Capital Territory

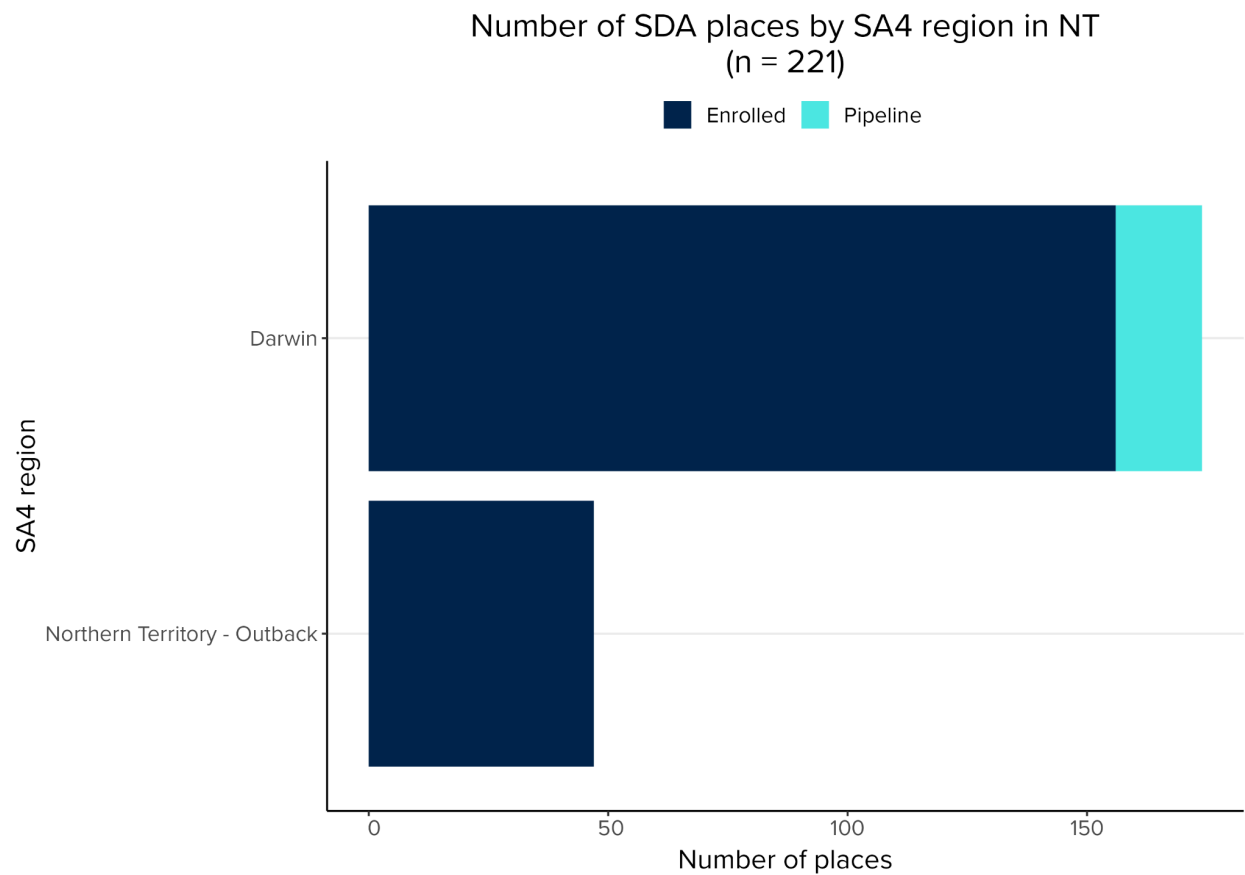


Note: The NDIA reports no Legacy stock for the Australian Capital Territory.

Northern Territory

Figure 31 illustrates the number of SDA places in the Northern Territory’s SA4 regions. ‘Northern Territory - Outback’ had no pipeline places and 47 enrolled places, whereas ‘Darwin’ had 18 pipeline places and 156 enrolled places.

Figure 31 - Estimated SDA places in the Northern Territory



Note: The NDIA reports no Legacy stock for the Northern Territory.

Future plans for SDA dwellings beyond the current pipeline

Plans to build more SDA dwellings beyond current pipeline

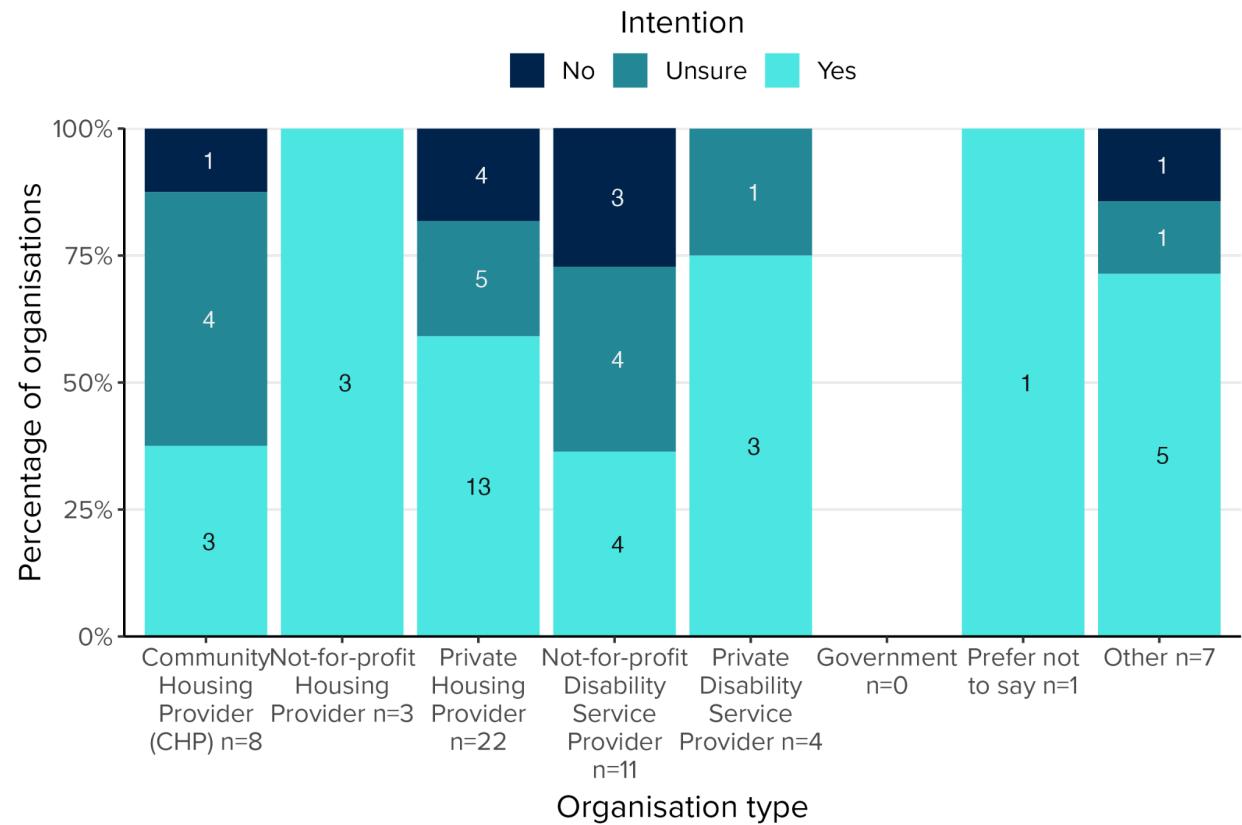
More than half of respondents (57.1%) indicated they had plans to build further dwellings beyond their current SDA pipeline. Another 26.8% were unsure about their plans, and 16.1% indicated they had no plans to develop more SDA dwellings beyond their pipeline.

Future plans by organisation type

The organisation types that were more certain of their future plans to build further SDA dwellings beyond their pipeline were Not-for-profit Housing Providers (100.0%), Private Disability Service Providers (75.0%), those who did not fit into the organisation type categories (71.4%), and Private Housing Providers (59.1%). CHPs were more uncertain about their future plans (50.0%), while Not-for-profit Disability Service Providers had equal proportions for being uncertain and planning future developments (36.4% each). Not-for-profit Disability Service Providers also had the highest proportion of respondents who are not intending to build future SDA dwellings (27.3%), followed by Private Housing Providers (18.2%). The breakdown of future plans by organisation type is shown in Figure 32.

Figure 32 - Plans to build SDA beyond the current pipeline by organisation type

Intention to build further SDA dwellings by organisation type
(n = 56)



Note: ‘Prefer not to say’ only consisted of 1 respondent; therefore, this proportion needs to be interpreted with caution.

Future pipeline plans

The individual plans to develop future SDA places (including those who were ‘uncertain’) ranged between 1 additional place to 500 additional places, with a total of 2,496 additional places planned. For those who did not plan to develop future dwellings (and those who were ‘uncertain’), many cited funding and investment restrictions that prevented them from committing to further developments.

Conclusion

This report has presented the findings of a survey of the current SDA pipeline in Australia, providing insights around the expected supply of SDA places across a number of factors. The report also detailed the characteristics of organisations building SDA dwellings and their perspectives on operating in the market. The data collected offer unique value beyond the NDIA's publicly available data⁵⁹ as they capture pipeline data for dwellings as early as the 'land secured' stage and before the NDIA has been made aware of the developments. They do not, however, capture the entire breadth of SDA pipelines as only a portion of SDA builders and providers operating in Australia participated in the survey. The data can be used in conjunction with the NDIA's enrolment data to paint a more comprehensive picture of the current and future states of the SDA market.

Confidence in the market has fallen since last year, with many organisations reporting they were 'slightly unconfident' or 'slightly less confident' than they were 12 months prior. Notably, many organisations were experiencing sizable vacancies in their enrolled dwellings as well as uncertainty around the changes to the NDIS.

A sample of 60 organisations completed at least one part of the survey this year, with an additional 11 organisations having their pipeline data from last year's survey carried forward. This means a total of 71 organisations were represented in the 2024 survey. The pipeline component of the survey captured the data from 2,590 places across 1,703 dwellings. New South Wales, Victoria, Western Australia, and Queensland contained the vast majority of places with similar proportions, with South Australia containing around half as many as New South Wales. Tasmania, the Northern Territory, and the Australian Capital Territory collectively made up less than 3.0% of pipeline places, which is expected given the smaller presence of SDA in these jurisdictions. There was a strong trend of fewer places in dwellings with greater than 4 SDA residents and more places in dwellings with a smaller number of residents. Single resident dwellings were the most common, matching housing seeker preferences.⁶⁰

Houses were the most common type of building with SDA places in the pipeline, while High Physical Support was the most common design category. Indeed, the combination of these two classifications, being High Physical Support houses, had the largest number

⁵⁹ NDIA (2024). *NDIS quarterly report to disability ministers: Q4 2023-2024*. National Disability Insurance Agency. Supplement P. Downloaded 28 October 2024. <https://dataresearch.ndis.gov.au/media/4040/download?attachment>

⁶⁰ Aimers, N., Morgan, A. J., Tuohy, L., Rathbone, A., & Longworth, D. (2024). *Accessible Housing Data Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation. <https://www.housinghub.org.au/resources/article/accessible-housing-data-snapshot-july-2024-seekers-supporters>

of SDA places, though High Physical Support apartments were also very common. The recently increased pricing for 2-resident houses could explain this influx, as organisations have had time to react to the 2023 *SDA Pricing Review*, where High Physical Support houses were valued higher.⁶¹ Although High Physical Support apartments did see decreases in pricing, they were still a commanding presence. Despite the significant price increases for Improved Liveability dwellings, there was only a slight increase in Improved Liveability pipeline places, reflecting the uncertainty as to whether the category will continue to be available for new enrolments.⁶²

Similar to 2023, the number of pipeline places in group homes has continued to decrease as the market shifts in-line with recent recommendations from the *DRC*⁶³ and *NDIS Review*.⁶⁴ Apartments have commonly shown the highest number of SDA places in previous years, though with High Physical Support apartments getting price decreases, they appear to have stalled in terms of growth, with similar numbers as last year. As houses saw price increases across all design categories, it is understandable that they are now the most common building type for pipeline places.

Most pipeline places were in dwellings that are currently under construction, with a sizable portion being in the ‘land secured’ stage of development, reflecting an active pipeline. As these developments move along the pipeline, many are expected to be completed and ready for tenancy by the end of 2024, and even more by the end of 2025. Looking to the future, half of the responding organisations were certain of their plans to build further dwellings beyond their current pipeline, with a quarter being uncertain. Assuming all the plans, including the uncertain ones, go ahead, the SDA market can expect around 2,500 more places to enter the pipeline.

This report provides valuable insights to a variety of relevant stakeholders in the SDA market, including the providers of SDA housing and support, their investors, and developers. It also provides additional data and findings to the NDIA and governments at

⁶¹ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency, Exhibit 28. Downloaded 28 October 2024. <https://www.ndis.gov.au/media/6060>

⁶² Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS. Independent review into the National Disability Insurance Scheme: Final report*, Action 9.4. Downloaded 28 October 2024.

<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

⁶³ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*, Recommendation 7.43/44. Downloaded 28 October 2024.

<https://disability.royalcommission.gov.au/system/files/2023-09/Final%20Report%20-%20Volume%207%2C%20Inclusive%20education%2C%20employment%20and%20housing%20-%20Summary%20and%20recommendations.pdf>

⁶⁴ Commonwealth of Australia, Department of the Prime Minister and Cabinet (2023). *Working together to deliver the NDIS. Independent review into the National Disability Insurance Scheme: Final report*, p. 141. Downloaded 28 October 2024.

<https://www.ndisreview.gov.au/sites/default/files/resource/download/working-together-ndis-review-final-report.pdf>

all levels. Finally, the people who live in SDA, who are looking to live in SDA, or, who are seeking alternative SDA, can also take away new learnings about how the market currently looks and operates. The current data paints the picture of a dynamic market, where the pipeline reacts to the needs of participants and the actions of the NDIA. There is, however, noted uncertainty and concerns that highlight the need for more work to ensure people with disability have access to housing and support that meet their needs and preferences.

Appendix A: Data cleaning and screening

Data cleaning

Respondents were contacted for follow-ups when there was uncertainty or inconsistency in their data. In situations where data follow-ups were not resolved by the end of data collection, some data were excluded from the overall analyses. Any dwelling that was missing a development status was removed. These removals were done most commonly for previous data that was not updated for this year (134 dwellings), though additional cases included not being the primary provider for the development (6 dwellings), and not having land secured (2 dwellings). Another 2 dwellings were excluded as they did not have a design category, build type, or number of residents listed. Other dwellings that had incomplete information were included, though are noted in the relevant sections of the report when their data were missing. Additionally, 7 dwellings had inconsistencies between their building type and the number of residents, so these were changed to be consistent (depending on the information provided, either the building type or number of residents was changed). Finally, 4 dwellings had their occupancy date removed as they were set in the past, but the development status indicated building had not commenced, and 12 dwellings had their occupancy dates set to October 2024, as they were listed as completed, but still pending enrolment with the NDIA.

Data screening

A total of 49 organisations completed both parts of the survey (5 of them did not fully complete the pipeline component of the survey, though the data that was usable was included). Another 5 organisations completed the QuestionPro portion of the survey, but did not have a current pipeline to report or update. A further 2 organisations completed the QuestionPro portion and indicated they did have a current pipeline, but did not report their pipeline in the Google Sheet portion. This resulted in 56 completed QuestionPro responses overall.

In terms of the pipeline survey, 3 organisations completed the Google Sheet portion of the survey, but did not start the QuestionPro survey, and another organisation did not complete the QuestionPro survey after completing the Google Sheet portion. Another 2 organisations started but did not fully complete the pipeline survey, with none of their data being able to be included. One organisation's pipeline data were removed as they did not have land secured at the time of the survey. Some organisations only updated

their pipeline from last year and had no new pipeline dwellings to report. This meant that 7 of the organisations who completed the pipeline survey did not have current pipeline data. This resulted in 45 organisations having pipeline data. They reported a total of 2,314 places across 1,543 dwellings (after removing places that were missing a development stage or the number of expected residents). It should be noted that these totals are only for the organisations who were participants in this current survey and not the data from 2023.

Dwellings and places from the 2023 supply survey that were not reported this year (as the organisations developing them did not participate in the 2024 survey), but were estimated to still be in the pipeline, were added to the above data. Any places from the 2023 dataset that were estimated to be ready for occupancy by September 2024 (the month the survey was run) or later were incorporated into the 2024 dataset.⁶⁵ This gave a further 276 places (160 dwellings), being developed by 11 organisations, none of whom contributed data to the current survey. Overall, the data for the 2024 SDA supply survey report consists of 2,590 pipeline places in development (contained in 1,703 dwellings), as reported by 56 organisations.

Please note that the survey focused on SDA dwellings in the pipeline, and therefore did not include any completed dwellings that had already been enrolled with the NDIA. This was to avoid duplication with what is already published by the NDIA. For the purpose of this survey, dwellings were defined to be in the pipeline if they were in 1 of the following development stages:

- Construction completed, pending enrolment with the NDIA
- Under construction
- Development stalled
- Development and building approval completed and contractually committed to build
- Land secured, waiting for building approval and/or finance approval

The 2016 Statistical Area Level 4 (SA4) region⁶⁶ for each dwelling was identified using the Australian Bureau of Statistics' map tool.⁶⁷ The addresses provided for each dwelling

⁶⁵ This date is an estimated occupancy date only and should be interpreted with caution

⁶⁶ The NDIA reports geographical data relating to SDA according to the Australian Statistical Geography Standard release 1, 2016. Therefore, the current report classified pipeline data according to the 2016 SA4 regions to enable comparisons to NDIA data.

⁶⁷ Available here: <https://maps.abs.gov.au/> Accessed 15 September 2024.

were used to achieve this. In circumstances where incomplete addresses were provided, as much information as possible was entered (street name, suburb, and/or postcode) and used to determine the region.

Appendix B: List of contributors who provided consent for publication

The Housing Hub sincerely thanks all organisations who participated in the survey.

1. 4u Care
2. Ability Housing
3. Ability SDA
4. Accessible Homes Australia
5. Accessible Living Limited
6. ADAPT Housing
7. Adaptive Housing
8. ALH Engineering Services
9. Alliance Access Homes
10. Believe Housing Australia
11. Better Life Housing
12. BlueCHP
13. Bold Developments
14. Bright Future SDA Homes
15. Build New Homes Australia
16. Cerebral Palsy Alliance
17. Charvin & Slaven Property Group
18. CHC Australia
19. Churches of Christ Housing Services
20. Colac Otway Disability Accommodation
21. Community Living & Respite Services
22. Cooinda Terang
23. DEC Housing
24. Disability Homes Victoria
25. disAbility living (dLi)
26. Edenbridge Living
27. ELJET Property Group
28. Enliven Housing
29. Evolve Housing
30. For Purpose Investment Partners
31. Grayllen Co.
32. Guardian Living Australia
33. Halcyon Homes WA
34. Housing Choices Australia
35. Hunter Care Living
36. Illowra Living
37. iNSiTU Housing
38. Just SDA Management
39. Kennett Ridge
40. Kyeema Support Services
41. Liverty Housing
42. Living Well Solutions
43. Multitask
44. MyLife Housing
45. Paramount Disability Homes
46. Sana Living
47. SDA Head Leasing
48. Specialist Disability Property 28
49. SDA Smart Homes Australia
50. Seton Villa
51. Specialist Disability Accommodation Pty Ltd
52. Sylvanvale
53. Synergy Housing
54. The Cram Foundation
55. The Trustee for Roberts SDA Homes
56. Tradies Finance
57. Youngcare
58. YourPlace Housing

Appendix C: SDA design categories and building types

In order for registered SDA providers to be able to receive payments, their enrolled dwellings must be tenanted by an NDIS participant with SDA funding in their plan. To enrol an SDA property with the NDIA, SDA providers submit information on the design category, building type, number of bedrooms, location of the dwelling and details of the certification of the dwelling to SDA design standards.

New build SDA dwellings are enrolled with the NDIA in 1 of 5 design categories. Older SDA properties that don't have any special design features may be enrolled as 'Basic', but this category is not available for new build SDA. Design categories for new build SDA are:

Improved Liveability – For tenants who find it difficult to see or understand things around them. Improved Liveability SDA is easy to move around in. Doorways, handles and switches are easy to see and it's often easy to see from 1 room through to the next.

Fully Accessible – For tenants with significant physical disability. Most often, people who are eligible for Fully Accessible SDA use a wheelchair to get around some or all of the time. There are no steps in a Fully Accessible home. Doorways are wide enough for a wheelchair. The bathroom is designed to be used by people who are sitting as well as standing and the kitchen often is too.

High Physical Support – For tenants who most often use an electric wheelchair to get around and/or a hoist to get in and out of bed and who need many hours of support every day. A High Physical Support home has all the features of Fully Accessible SDA, plus emergency back-up power and a ceiling that is strong enough for a ceiling hoist. It will often have an intercom that connects the tenant to a support worker who is close by. It may also have assistive technology that suits the needs of the tenant – this could include doors, lights and heating that can be controlled with your voice or a device.

Robust – For tenants who sometimes act in a way that may not be safe for them or the people around them. The walls, windows and other fittings in a Robust home aren't easily broken. Robust homes have good sound-proofing, so that sounds from outside don't upset the tenants and so that any noise the tenants make doesn't impact adjoining properties. The doors and windows are secure. A Robust home will also have a space where tenants or staff can go to keep safe.

Multi-design - This option has been recently introduced by the NDIA. The NDIA's definition for Multi-design dwellings is as follows: "SDA Design Standard compliant New

Build dwellings with more than 1 bedroom and with bedrooms of differing design categories. A dwelling where all bedrooms meet several and the same design categories is not a Multi-design category dwelling. In Multi-design category dwellings, all shared areas must comply with the minimum requirements of all enrolled design categories.”

In addition to their design category, SDA must be enrolled as 1 of the following building types:

Apartments – self-contained units that are part of a larger building complex.

Duplexes, Villas, Townhouses – semi-attached properties within a single land title.

Houses – detached low rise dwellings with gardens or courtyards.

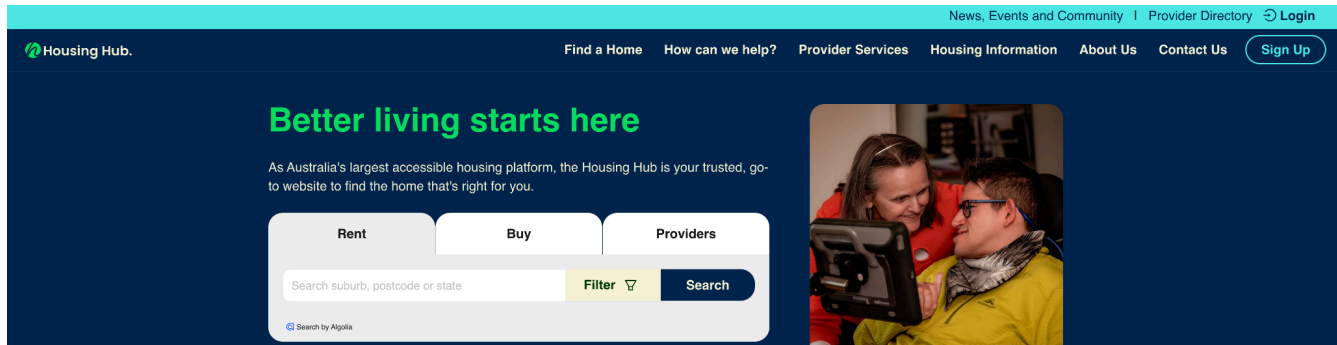
Group Homes – houses that accommodate up to 5 residents.

Larger Dwellings – properties that house more than 5 long-term residents. This is also called ‘Legacy’. These dwellings are older SDA which housed people with disability prior to the NDIS being introduced.

Appendix D: About the Housing Hub

The Housing Hub is an online community of people with disability and housing providers working together to create accessible housing options.

The Housing Hub website – www.housinghub.org.au – lists properties for rent or sale that may be suitable for people with disability. With over 4,000 properties currently listed, the Housing Hub features all design categories of Specialist Disability Accommodation (SDA), as well as many other types of accessible housing.



Housing Seekers can search through the listings, or create a Housing Seeker Profile by answering a few questions about where they want to live, what type of home they're looking for, what features are required and who they would like to live with. The Housing Hub will then show the seeker listed properties that are a good match for their profile. Each listing includes a 'Suitability Score', which provides the seeker with a clear assessment of how well the property aligns with their preferences. When creating a profile, Housing Seekers can also elect to be automatically notified when a property is listed that is a good match to their profile. For more information on how Housing Seekers and Housing Providers are using the Housing Hub, check out the [Accessible Housing Data Snapshot](#).

Generalised data resulting from Housing Seeker Profiles on the Housing Hub provides insights into the demand for accessible housing across Australia. With over 12,000 seekers signed up with the Housing Hub as of November 2024, the insights generated are significant. Sharing the data gleaned from these interactions with the housing market enables the needs and preferences of people with disability to shape future development.

Resources

The Housing Hub website contains libraries of resources for Housing Seekers, supporters, and Housing Providers – including videos, guides, and templates.

To explore, go to: <https://www.housinghub.org.au>

Services for Housing Seekers

The Housing Hub team provides a range of services to support Housing Seekers. Through workshops, resources, and the NDIS Housing Advice Line (1300 61 64 63), people with disability are supported to:

- Understand the range of housing options that may be available to them
- Find out more about Specialist Disability Accommodation (SDA)
- Think about where they may want to live, what type of home they want to live in and who they want to live with
- Find out from the NDIS if they are eligible for SDA funding

Services for Housing Providers and vendors

The Housing Hub website is an effective way for providers and vendors of accessible housing to connect with suitable tenants. Providers can manage listings for their properties without needing to engage a third party, and prospective tenants can communicate with providers directly.

Changes to the Housing Hub's interface have dramatically improved the experience for Housing Providers and vendors, reducing the time it takes to list properties and simplifying the process – particularly for organisations with multiple properties to list.

It is currently free to use the Housing Hub to create up to two property listings and receive enquiries from prospective tenants. Many providers wish to list more than two properties so have subscribed to a paid plan to list properties and receive enquiries from Housing Seekers.

Premium services

The Housing Hub offers a range of premium services for a fee, to Housing Providers, investors and developers operating in the accessible housing market.

Understanding the SDA Market

Understanding the SDA market is extremely important when planning your property pipeline. With access to critical information around supply and demand in the accessible housing market, providers and investors can harness this knowledge to ensure building decisions match the needs of Housing Seekers.

The Housing Hub has made it easier for investors to gain a clearer picture of SDA supply and demand by developing 3 unique products available for purchase.

Market data subscription

Generalised data resulting from Housing Seeker searches on the Housing Hub can be used to understand demand for accessible housing in locations across Australia. With insights into

what types of housing (and housing features) are desired in locations, providers can build to address demand with greater certainty.

The market data subscription includes a data report in an easy-to-read dashboard and an Excel format spreadsheet that can be emailed to subscribers on a quarterly basis in early January, April, July, and October each year. Each report includes the 3 preceding months of Housing Seeker search data, as well as information about supply. Demand data is shown by SA3 and SA4 locations across the whole of Australia, and shows the number of searches for each location along with the number of searches for property types and design categories. Supply data is from the *SDA Supply in Australia* report and NDIA data. [Click here for more information.](#)

The market data report can also be purchased as a one-off report or as multiple reports.

Market data report for a Local Government Area

A bespoke report for a Local Government Area can be developed to show the demand and supply for housing in that area from data within the Housing Hub and the SDA Supply Report. Data is shown for a 3-month period in detail for the selected Local Government Area. [Click here for more information](#) (and click the “One-Off Data” heading).

Attracting tenants

The Housing Hub offers a number of ways to feature your organisation and its properties to engage with prospective tenants.

Featured property listing

Housing providers and vendors can promote a listing as a ‘Featured Property’. Featured properties appear on the homepage of the Housing Hub website, and are promoted via the Housing Hub’s social media channels and via email to our subscriber list. Featured Listings are targeted to the audience from the state where the listing is located. [Click here for more information.](#)

Advertising

Providers can also advertise their organisation and link to their provider page on the Housing Hub through paid advertisements that appear as banner ads on Housing Seekers’ search results page. [Click here for more information.](#)

Providers can promote their properties within a state-based electronic newsletter and via Housing Hub Social Media channels. Click here for more information: [Social Media](#) or [e-news](#).

Supporting prospective tenants to secure SDA and support funding

The Housing Hub offers a specialist home and living support coordination service. This service only undertakes support coordination for home and living supports, therefore it compliments a participant's existing support coordinator to support people with disability to prepare evidence to submit to the NDIA for Home and Living supports. [Click here for more information.](#)

For more information on the Housing Hub's suite of services for Housing Providers and vendors, contact the Housing Hub's Customer Solutions Specialists at 1300 508 945.