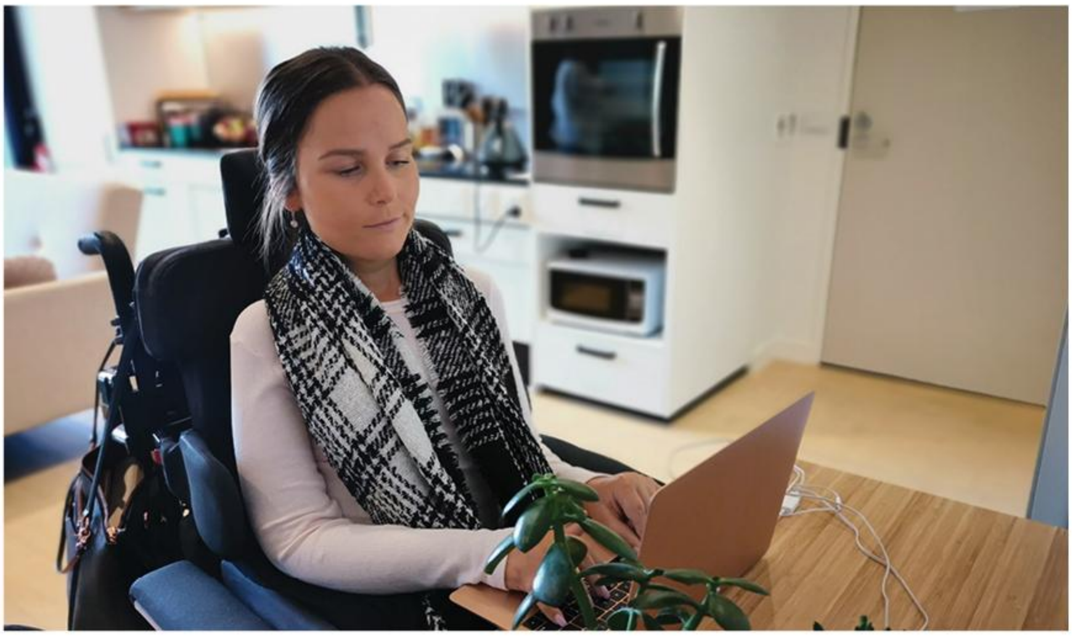
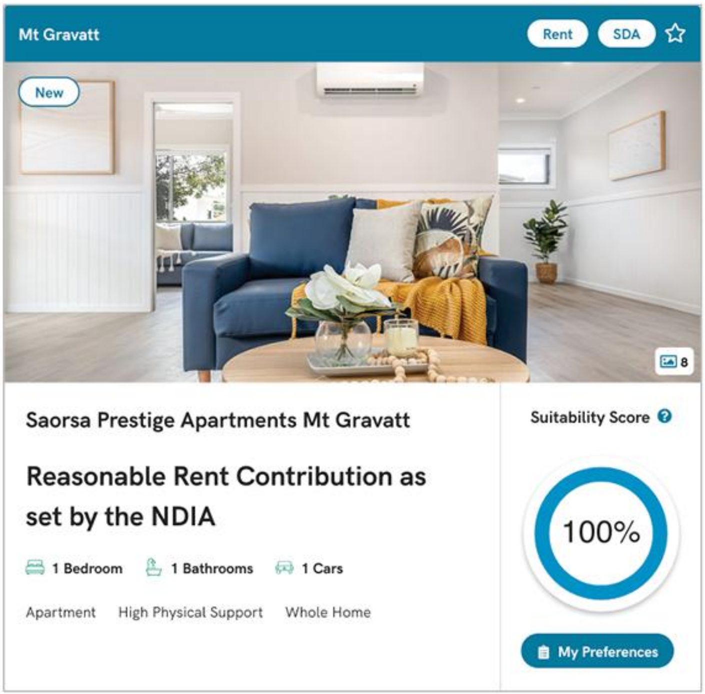


Listings Snapshot

August 2022



Housing Hub
Find the home that's right for you

SUMMER FOUNDATION

Housing Hub
Listings Snapshot

Third edition – August 2022
Second edition – February 2022
First published – June 2021

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[3] Housing Hub. Melbourne, Australia

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DISCLAIMERS

The Housing Hub and the Summer Foundation have prepared this report in good faith based on information available to us at the date of publication. Information has been obtained from sources that we believe to be reliable and up to date, but we have not verified its accuracy or completeness. The Housing Hub and the Summer Foundation do not make any warranty, express or implied, regarding any information in the report, including warranties as to the accuracy, completeness or fitness for purpose of the information. The Housing Hub and the Summer Foundation are not liable to any person for any damage or loss that has occurred, or may occur, in relation to that person taking or not taking action in respect of any representation, statement, opinion or advice referred to in this report

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Introduction

Welcome to the third snapshot of listings data from the Housing Hub.

The listings snapshots provide detailed and up-to-date information about the supply of accessible housing available on the Housing Hub. This information complements the seeker snapshot report[1], which releases Housing Hub data about the demand for accessible housing.

Supply and demand data are collected from the Housing Hub's updated website version, launched in August 2020. This update of the website was the result of co-design with housing seekers, housing providers and supporters of people with disability. A key component of the updated website is a data model that helps match housing seekers to suitable properties. This data model continually collects information from housing seekers, and housing providers and their listings.

Data about housing seekers is collected when people with disability search for properties or create a profile on the Housing Hub. When creating a profile, housing seekers are asked a series of questions about where and with whom they would like to live, and what type of property features they are looking for. Housing seekers can then be alerted when new properties that match their preferences and needs are added to the website. This seeker data is published in the Housing Hub seeker snapshot reports[2].

Data about housing providers and listings is collected when providers create a profile on the Housing Hub and make listings for their property vacancies. When creating listings, providers can include a variety of details about their property, such as property features, location, images and support services. By completing all fields on their listings, housing providers ensure that their listings are shown to the most suitable housing seekers. Data on seekers' interactions with listings, such as their views and enquiries, is also collected. This listings data is published in the Housing Hub listings snapshot reports[3].

The number of property listings and housing providers on the Housing Hub continues to grow rapidly, mirroring a rapid growth in housing seekers using the Housing Hub to search for a new home. Since the Housing Hub website was first launched in 2017, more than 413,000 people have accessed the site to search for accessible housing, and more than 9,000 properties have been listed. At the time the data for this report were collected, more than 2,000 properties were published on the Housing Hub, and more than 1,500 housing providers had an active Housing Hub profile. As a result, the Housing Hub collects a significant amount of data on the current supply and demand for accessible housing. Releasing this supply and demand data, as well as comparing demand and supply on the Housing Hub, can give both seekers and providers valuable insights into the accessible housing market.

Aims and content of the listings snapshot

The current report aims to provide up-to-date information about housing supply on the Housing Hub, extending upon the first 2 editions of the listings snapshot report[4]. This includes information about housing providers and their listings on the Housing Hub, as well as information regarding the performance of listings.

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[1] Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., & Aimers, N. (2022, June). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Wellecke, C., Aimers, N., Rathbone, A., & Winkler, D. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone, A., Aimers, N., & Winkler, D. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation. **https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers**

[2] Ibid.

[3] Wellecke, C., Aimers, N., Rathbone, A., Winkler, D. & Mulherin, P. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation; Rathbone, A., Aimers, N., & Winkler, D. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation. **https://www.housinghub.org.au/news/listings-snapshot**

[4] Ibid.

For the first time, this edition of the Housing Hub listings snapshot also provides comparisons of listings data to the seeker data published in the most recent Housing Hub seeker snapshot[5]. It is hoped that these comparisons can help uncover potential gaps between what seekers are looking for and what is currently being offered in the market. This is critical given that recent research[6] has increasingly shown the importance of matching supply and demand in the accessible housing market to avoid prolonged vacancies and ensure that housing seekers can find suitable properties.

[5] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation.
https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers

[6] Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., Rathbone, A., & Aimers, N. (2022). *Specialist Disability Accommodation provider experience survey: June 2022.* Housing Hub and Summer Foundation.
https://www.housinghub.org.au/resources/article/sda-provider-experience-survey-2022

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 is completely free to use for housing seekers. All the core features of the Housing Hub are also free to use for housing providers and professional supporters, and the site includes a number of premium features that providers may choose to pay for – see page 47 for details.

The Housing Hub lists properties for rent or sale that may be suitable for people with disability. More than 9,000 properties have been listed since the website was launched, and more than 2,000 properties are currently published as of July 2022. 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 are looking for, what features they require 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 tells the housing seeker how well the property matches their preferences. When creating a profile, housing seekers can also elect to be automatically notified when a property is listed that matches their housing seeker profile.

The latest version of the Housing Hub also has a suite of features aimed at making the site valuable and time-efficient for housing providers. These include the ability to easily duplicate listings, a revamped provider portal for managing listings and a branded landing page. All of these functions of the Housing Hub are free.

Generalised data resulting from housing seeker profiles and property listings on the Housing Hub provide insights into the demand and supply of accessible housing across Australia. With more than 2,000 properties listed and more than 1,500 active housing provider accounts on the Housing Hub at the time the data in this report were generated, the insights are significant. Sharing the data gleaned from these interactions with the housing market helps inform housing providers and enables the needs and preferences of people with disability to shape future development.

Terms Used

Listings	(Property) listings are advertisements on the Housing Hub website for homes that are available for people with disability to rent or buy. Each listing on the Housing Hub is created and managed by the owner or provider of the property. Listings on the Housing Hub include various housing types, including houses, units/villas, apartments, and rooms in shared supported accommodation (the latter are commonly known as ‘group homes’). Currently, listings on the Housing Hub include all design categories of SDA and non-SDA housing options, as well as various other categories of housing for people with disability, such as Medium Term Accommodation (MTA) and Short Term Accommodation (STA). Currently, there are listings on the Housing Hub in all Australian states and territories.
MTA	Medium Term Accommodation is housing that can be paid for using a type of core support funding called MTA funding, which is available to some NDIS participants. Housing which accepts MTA funding is usually available for up to 90 days and will only cover the cost of the housing, not the support. More information is on the Housing Hub resources pages.
NDIS	The National Disability Insurance Scheme (NDIS) provides support to around 534,655 Australians who have a disability. People who receive support from the NDIS are referred to as NDIS participants. The NDIS funds a wide range of supports that are considered reasonable and necessary for participants to live an ordinary life, including home modifications for participants who require them to live more independently in their homes. For a small number of participants who have an extreme functional impairment or very high support needs, the NDIS may fund SDA. The NDIS is administered by the National Disability Insurance Agency (NDIA).
Profiles	(Housing seeker) profiles are a set of data that housing seekers may choose to provide to the Housing Hub. This is data about seekers’ housing needs and preferences. This data enables the Housing Hub to suggest properties to the seeker that meet their needs and preferences.
Providers	(Housing) providers are the organisations or individuals who are offering accessible housing for rent or sale on the Housing Hub.
SDA	Specialist Disability Accommodation (SDA) is housing for people with an extreme functional impairment and/or very high support needs. SDA is funded under the National Disability Insurance Scheme (NDIS). SDA has design features that maximise residents’ independence and reduce the amount of person-to-person supports required.
Seekers	(Housing) seekers are people who are using the Housing Hub to search for housing. Seekers are usually people with disability looking for accessible housing options.
STA	Short Term Accommodation includes Short Term Respite Accommodation which offers short term housing and support and Short Term Holiday Accommodation which only offers short term accommodation. More information is on the Housing Hub resources pages.
Supporters	Supporters are people who work with people with disability to support their housing search. Supporters include family members, support coordinators and allied health professionals.

Data

As well as its primary function of connecting seekers of accessible housing with housing vacancies, the Housing Hub has been built to collect data that will assist the market in developing housing that meets the needs of people with disability. As part of this aim, data is collected about providers and their property listings.

Provider and listings data have been analysed in this report, along with website data on listing performance. This edition of the Housing Hub listings snapshot also provides comparisons to data from the Housing Hub seeker snapshot[7], as well as NDIA data on housing vacancies. These data sources are described below.

Provider data

Provider data is collected as providers create an account on the Housing Hub. To become a housing provider on the Housing Hub, an organisation provides information that is reviewed by a member of the Housing Hub team. This includes information about the provider such as their name, contact details, location and types of properties offered.

The current report includes data from all providers with an active Housing Hub account as of 18 July 2022. In total, this comprised 1,533 providers.

Listing data

After a provider account is confirmed, providers are able to create, edit and remove listings in their account. Listing data is collected as property listings are created by providers. This data includes information about each property, including features, images, property description, local area amenities and support provided. Since it was launched in 2017, there have been 9,003 listings created on the Housing Hub.

This report includes data for all listings that were published as of 18 July 2022. In total, there were 2,142 listings published by 322 providers.

Listing performance data

Performance data is collected by Google Analytics as Housing Hub users interact with the website. This includes de-identified information on listings being viewed, enquiries being generated, the time users spend on the site and pages visited. It is important to note that Google Analytics data does not reveal the identity of any users. If you would like to learn more about Google Analytics, here is a useful article.

Using Google Analytics helps the Housing Hub team understand how the website is meeting the needs of users to continually improve its performance. Please note that the Housing Hub does not capture or view the content of any enquiries that are submitted to housing providers.

The current snapshot investigated the performance of listings during a 1-month period (between 17 June - 17 July 2022) and assessed how listings' performance related to different elements and features of the listings. Performance was defined as the total number of enquiries that a listing received during the 1-month period. The total number of enquiries was calculated by summing how many times housing seekers (1) clicked to reveal the providers' phone number (a proxy for phone call enquiries), (2) clicked

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[7] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation. **https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers**

on the link to the providers' website (a proxy for website enquiries), and (3) completed the 'Contact Provider' form on the listing's website (email enquiries).

To gain a representative sample, all listings were ranked by the number of enquiries they had received between 17 June - 17 July. Subsequently, 60 listings were randomly selected for analysis using a random number generator to gain a representative sample of low and high performing listings.

NDIA data from the SDA Finder

The National Disability Insurance Agency (NDIA) advertises SDA vacancies via the SDA Finder website. This SDA Finder is available on the NDIS website.

Where relevant, data from the SDA Finder was compared to SDA listings published on the Housing Hub. This data was downloaded from the SDA Finder website on 18 July 2022.

It should be noted that all Housing Hub listings data is provided to the NDIA every week to populate the SDA Finder website. Therefore, it is likely that there are similarities between the listings on the Housing Hub and SDA Finder.

Seeker data from the Housing Hub seeker snapshot (profile and search data)

This Housing Hub listings snapshot also refers to the seeker data published in the most recent Housing Hub seeker snapshot[8]. This data comprised 2 sources: (1) profile data and (2) search data. Where seeker data is shown in this report, the data source will be indicated (i.e., profile or search data).

The below provides a brief overview of the seeker data. For a more detailed description, refer to the most recent Housing Hub seeker snapshot report[9].

Profile data is collected when housing seekers set up a housing seeker profile on the Housing Hub. This profile data can be used to understand the characteristics of housing seekers, as well as their housing needs and preferences. The most recent Housing Hub seeker snapshot captured data from profiles that had been updated between 23 November 2021 - 23 May 2022. In total, de-identified data from 1,359 housing seeker profiles were included.

Search data is collected when housing seekers search for properties on the Housing Hub without creating a housing seeker profile. When people use the Housing Hub and its search filters to look for properties, the Housing Hub collects de-identified data showing what people are searching for. Similar to the profile data, search data in the most recent Housing Hub seeker snapshot was limited to all searches conducted between 23 November 2021 - 23 May 2022. In total, this comprised 61,524 searches.

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[8] Wellecke et al. (2022, June). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation.

[9] Ibid.

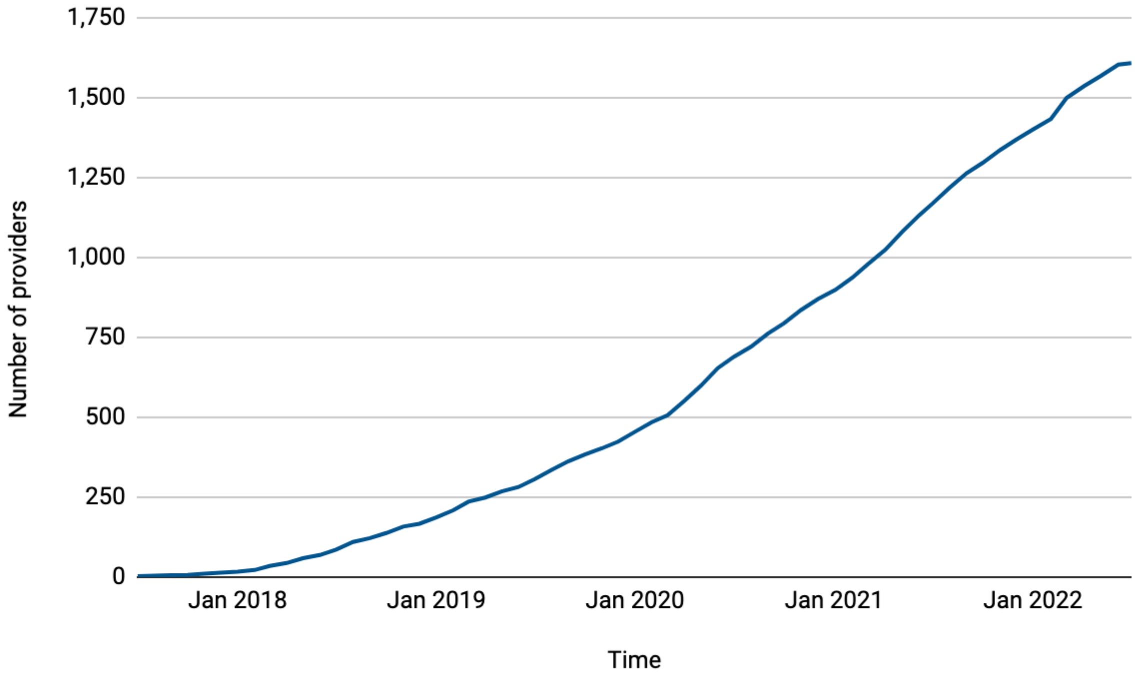
Housing Providers

Number of housing providers with an account on the Housing Hub

Below is an overview of the number of housing providers with an account on the Housing Hub.

As seen in Figure 1, there has been steady growth in the number of providers registering an account with the Housing Hub since its inception in 2017. As of 18 July 2022, there were 1,533 providers with an account on the Housing Hub. This represented an increase of 212 providers with an average growth rate of 3% per month since January 2022.

Figure 1. Growth in providers with a Housing Hub account



Number of housing providers with current listings on the Housing Hub

At the time the data for this report was downloaded (July 2022), there were 322 providers with active listings on the Housing Hub. The average number of listings per active provider was 6.7, which is similar to the number reported in the previous edition of the Housing Hub listings snapshot[10].

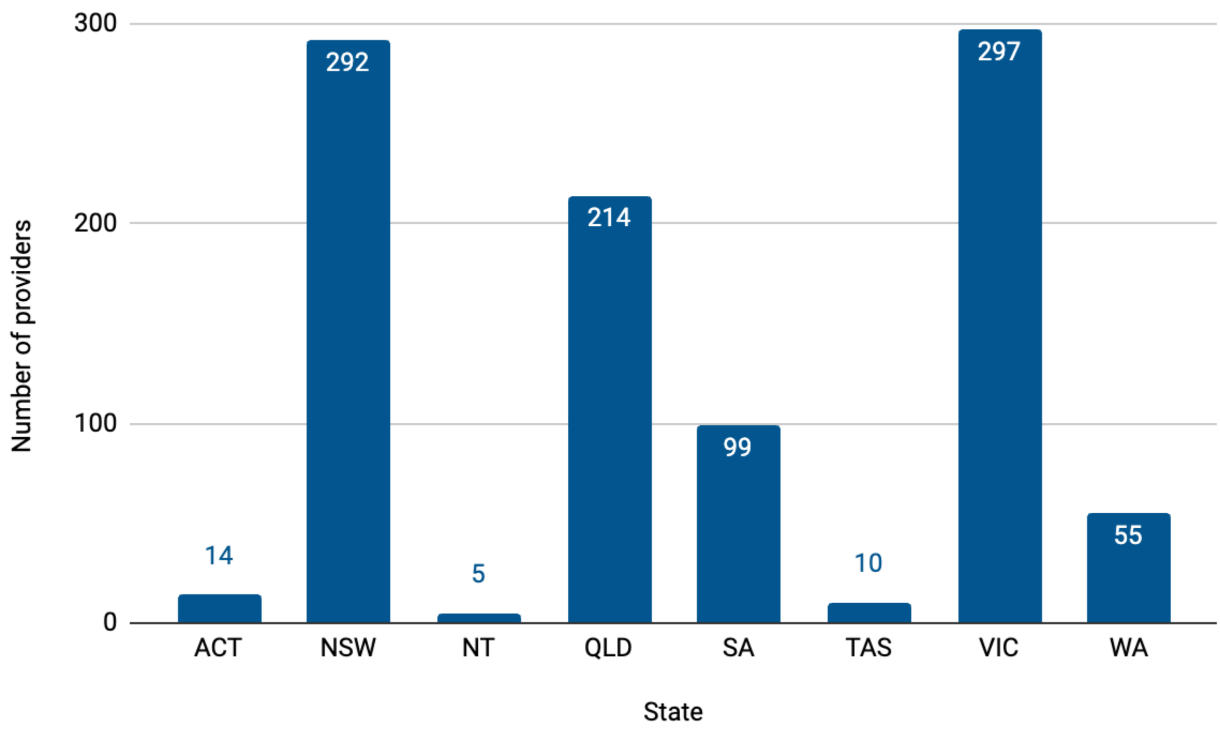
Similar to findings from the previous Housing Hub listings snapshot, a small number of providers again accounted for the majority of all listings on the Housing Hub. The top 10 providers accounted for 35% of listings and the top 20 accounted for 49% of listings. Conversely, 52% of all providers only had 1 or 2 listings, while the provider with the most listings had 233 listings. As mentioned in the previous listings snapshot, this indicates that there may be a high market concentration among housing providers on the Housing Hub and that the average number of listings per provider (6.7) may be inflated.

[10] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation. **https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-listings?cs=reports-and-publications&ct=Publications%20&%20reports**

Location of housing providers

Sixty-four percent (n=986) of providers gave details about which state or territory they are located in. This represents an increase of 6 percentage points since the previous snapshot[11]. These locations are shown in Figure 2. As can be seen, providers were located in all states and territories, with the majority being located in Victoria (30%), New South Wales (30%), and Queensland (22%).

Figure 2. States where housing providers are located



Type of housing provided

Providers also report the type of housing they will be listing on the Housing Hub. As shown in Figure 3, non-SDA providers were the most common provider type, with almost half of the providers (47%) indicating they will offer non-SDA properties on the Housing Hub. This was followed by short-term accommodation (STA) providers (37%), and SDA providers (33%).

As highlighted in the previous Housing Hub listings snapshot, it is interesting to note that the number of SDA providers on the Housing Hub (n=509) appears to be larger than the number of SDA providers that have ever been active according to the NDIA[12] (n=407). While a small number of providers set up multiple Housing Hub provider accounts based on the divisions within their companies, this large discrepancy also suggests that some providers on the Housing Hub may consider becoming an SDA provider in the future but are not yet active providers with the NDIA. Therefore, the large number of SDA providers on the Housing Hub may indicate a growing SDA market.

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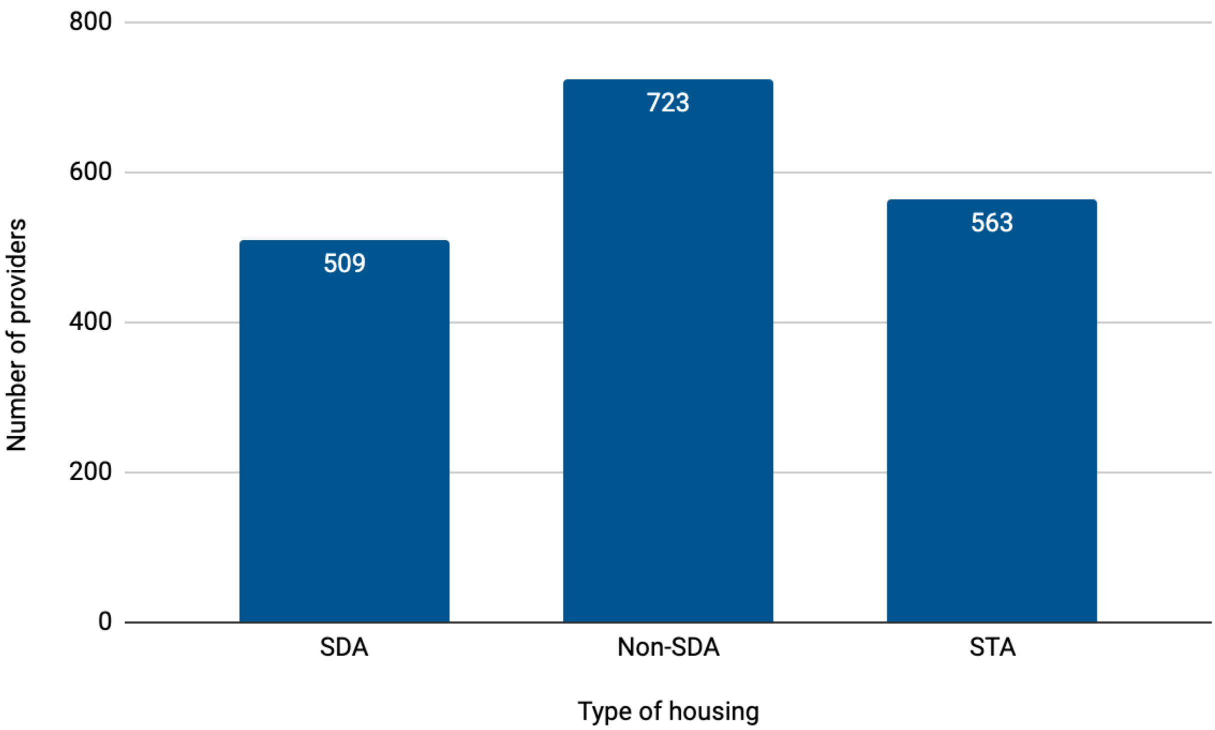
[11] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

[12] NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022.*
National Disability Insurance Agency. Table P. 3. **https://www.ndis.gov.au/about-us/publications/quarterly-reports**

Figure 3. Type of housing provided



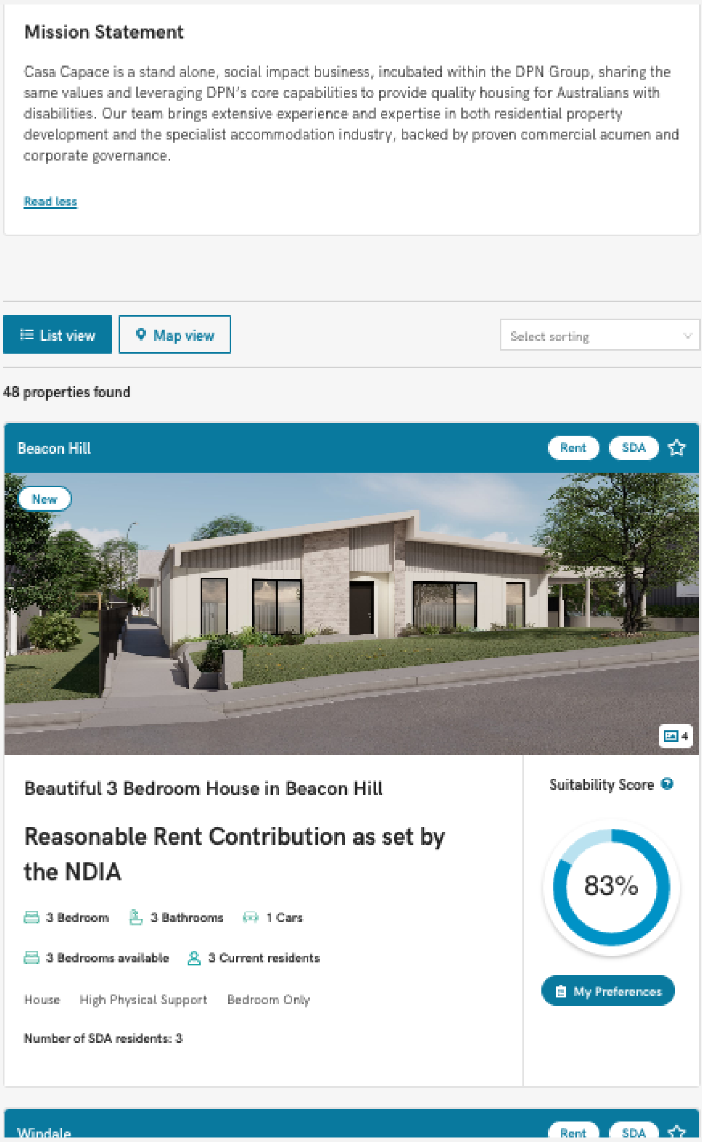
Note: Housing providers were able to select multiple housing types. STA = short-term accommodation.

Housing Hub Feature Highlight

When the latest version of the Housing Hub website was launched in August 2020, a new feature of a Provider Page was built in.

This feature allows providers to showcase their organisation with contact details, a logo, website link and a mission statement demonstrating their commitment to disability housing. So far, 63% of providers have added a mission statement and 54% have added their website details. These percentages have increased since the previous edition of the Housing Hub listings snapshot[13], indicating increased usage of these features.

The Provider Page also allows providers to showcase all their properties in 1 place on the Housing Hub. Providers can use their unique Housing Hub Provider Page URL to direct housing seekers from their own website and marketing resources directly to their Provider Page. This reduces the need for providers to invest resources in creating duplicate property listings on their own website when they can confidently send seekers through to the Housing Hub to see all of their listings in 1 place.



Retrieved from: https://www.housinghub.org.au/provider-property-listing/11698

[13] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Housing Hub Listings

The following data shows information about published property listings on the Housing Hub. Comparisons to seekers' preferences are also included. The data on seekers' preferences were taken from search data and profile data published in the most recent Housing Hub seeker snapshot[14] (refer to the data section on p.8 for further details).

Property types

Properties on the Housing Hub can be listed as either for rent or sale. Similar to the previous editions of the Housing Hub listings snapshots[15], almost all properties (99.8%) listed on the Housing Hub were for rent. See Figure 4.

Figure 4. Properties for renting or buying

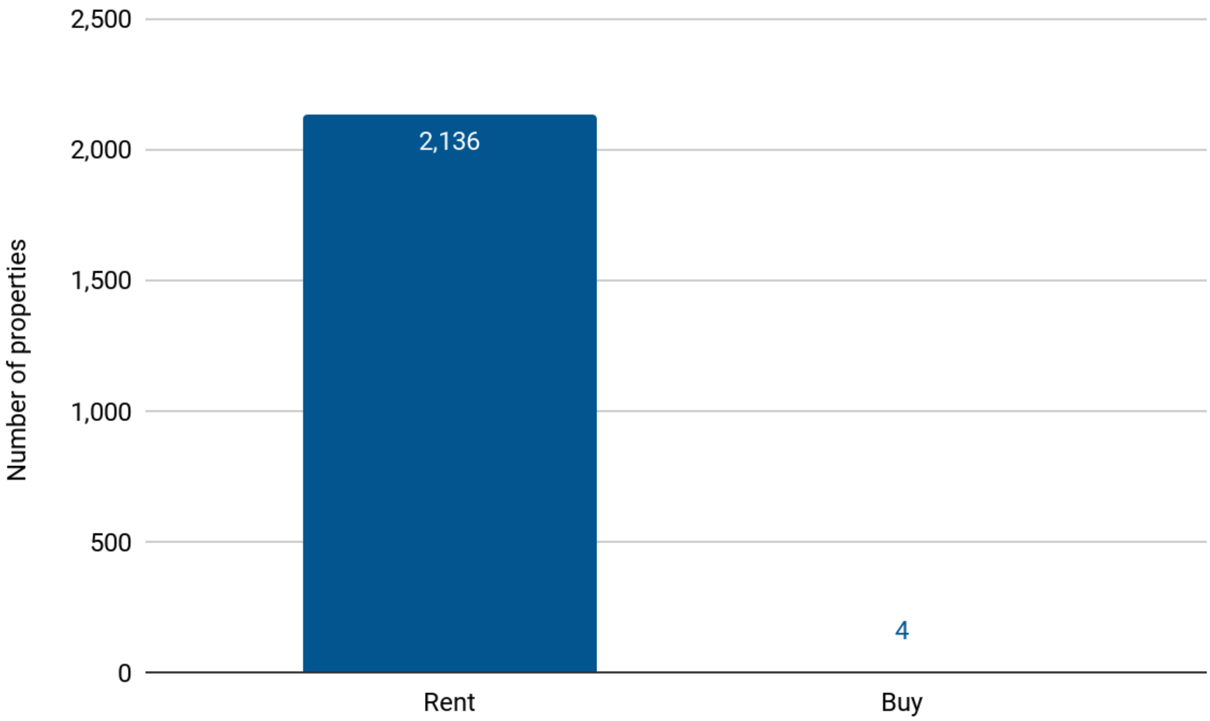


Figure 5 compares the above-shown number of property listings for rent or sale to seekers' need for renting or buying. As can be seen, housing seekers were predominantly looking to rent a property, which is consistent with the large availability of rental properties. However, a small proportion of seekers indicated they would like to buy a property, comprising approximately 6-13% of search and profile data. Given the very small number of properties that are offered for sale, these seekers will likely have difficulty finding suitable properties. Thus, there appears to be an unmet need for more properties on the Housing Hub that can be purchased.

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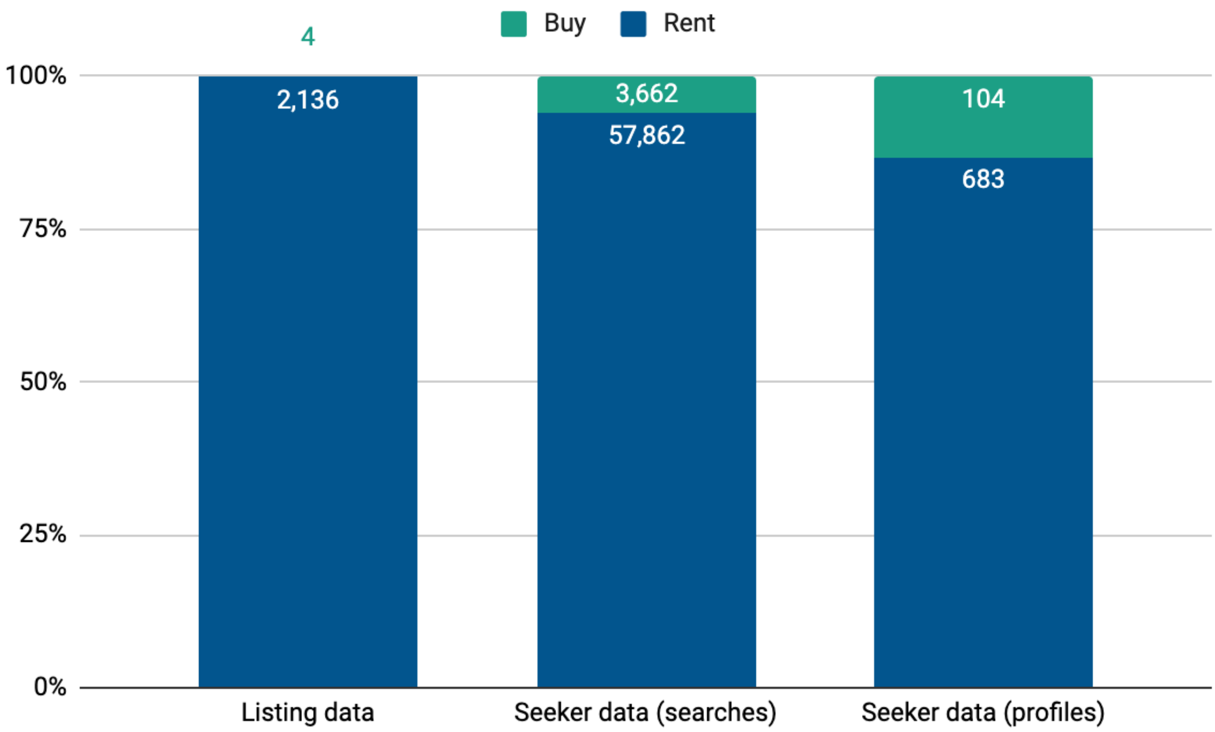
[14] Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022, June). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation. **https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers**

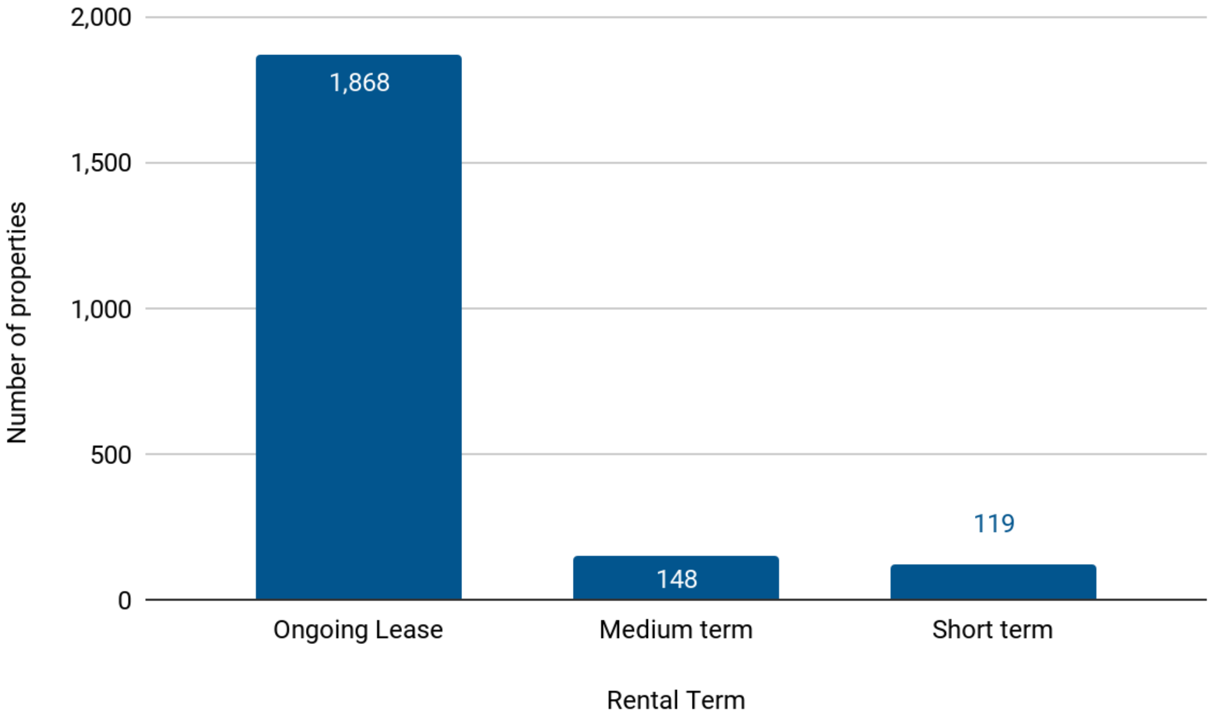
[15] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Figure 5. Comparison of supply and demand - properties for renting or buying (listing data) versus seekers' need for renting or buying (seeker data)



Of the properties that were for rent, the vast majority (87%) were offered on an ongoing lease. Only 7% of properties were Medium Term Accommodation (MTA), and only 6% were Short Term Accommodation (STA). Refer to Figure 6.

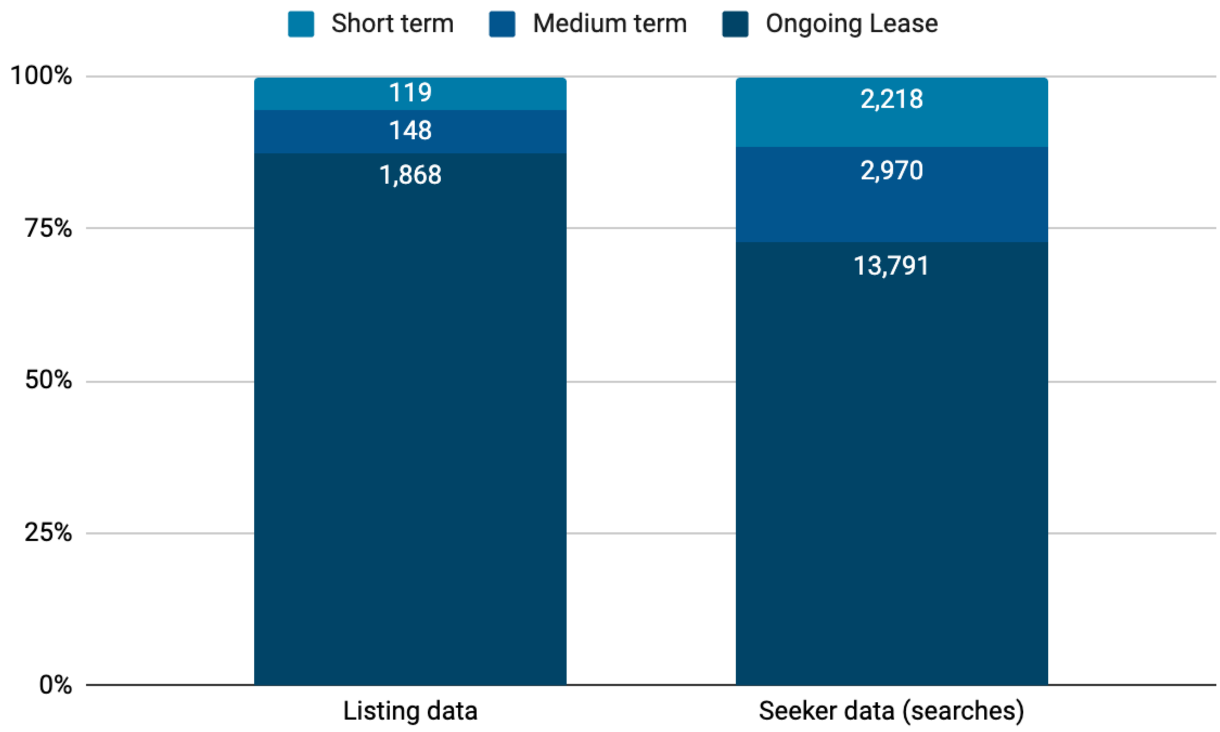
Figure 6. Rental term of properties



The rental terms offered by property listings are compared to seekers' preferences in Figure 7. Overall, the rental terms of listed properties appeared to be largely consistent with seekers' preferences, with the majority of seekers looking for properties with an ongoing lease.

However, the proportion of seekers looking for STA and MTA was slightly larger than the proportion of listings for these property types, indicating that there may not be enough STA and MTA properties available. STA and MTA are often needed as temporary housing while a person is waiting to move into a more appropriate long-term housing solution. As such, these property types are critical to prevent people with disability from being forced to live in aged care or hospital settings in the interim. Therefore, the potential lack of STA and MTA available to meet housing seekers' demand for these property types is concerning.

Figure 7. Comparison of supply and demand - rental term of properties (listing data) versus seekers' preferred rental term (seeker data)



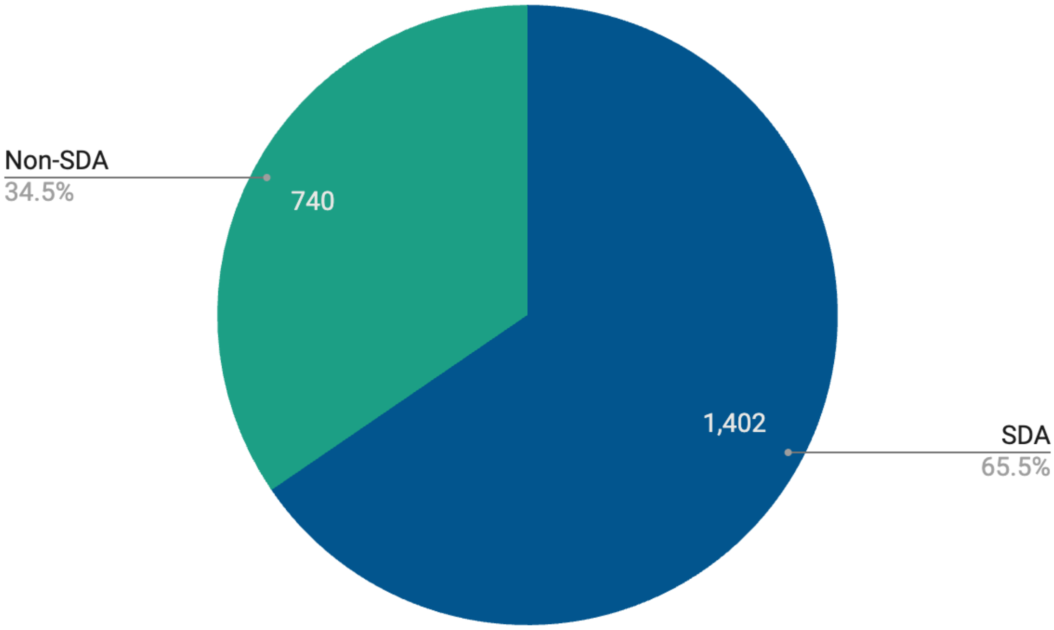
Note: Seekers were able to select multiple options.

Properties on the Housing Hub are classified as either Specialist Disability Accommodation (SDA) or non-SDA housing. SDA is housing designed with features for people with very high support needs or an extreme functional impairment. SDA housing is funded by the NDIS for eligible people. To learn more about SDA, see the SDA video series on the Housing Hub.

Figure 8 shows the proportion of SDA and non-SDA properties listed on the Housing Hub. As can be seen, the majority of listings (66%) were for SDA properties. The previous listings snapshots also identified that the Housing Hub has a high proportion of SDA properties[16], suggesting that the Housing Hub remains a common platform for advertising SDA vacancies.

[16] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot.* Housing Hub and Summer Foundation; Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

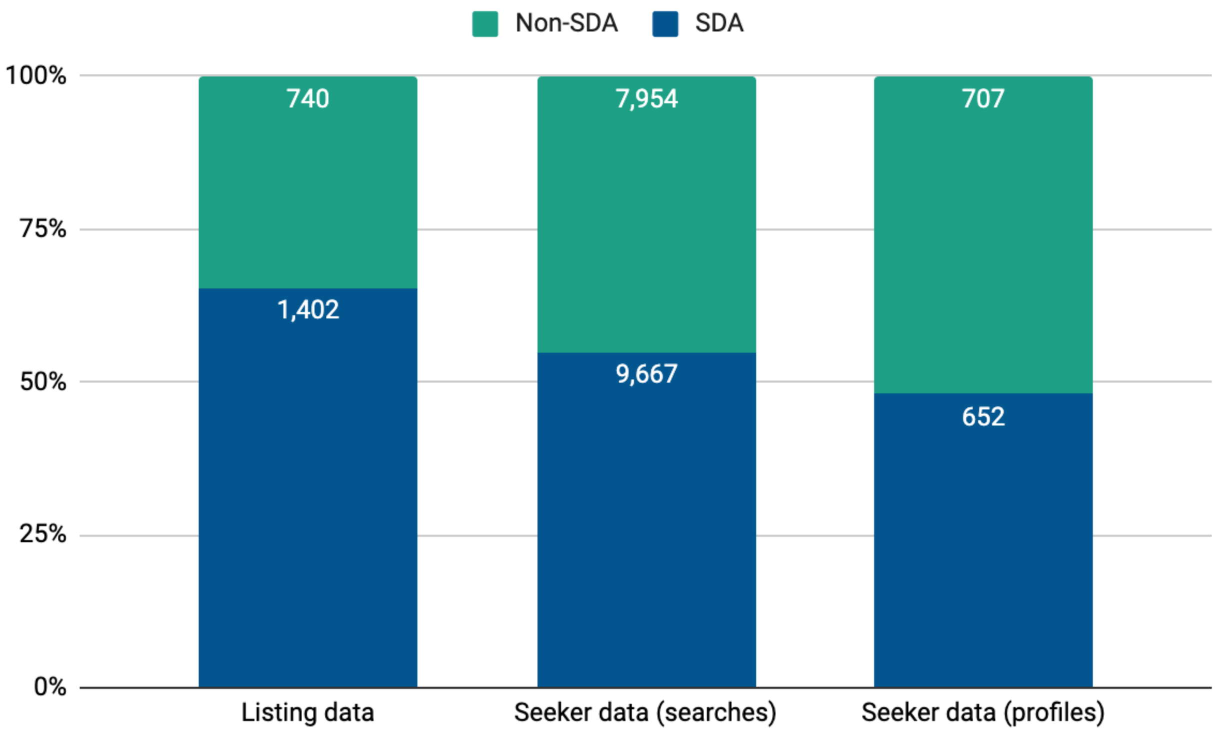
Figure 8. Listings for SDA and non-SDA properties



The proportion of listings for SDA and non-SDA properties was compared to the proportion of seekers needing SDA and non-SDA properties (refer to Figure 9). As can be seen, the number of listings for non-SDA properties (n=740) was almost equal to the number of seekers who created a Housing Hub profile to look for non-SDA properties (n=707). However, the number of SDA properties (n=1,402) listed on the Housing Hub exceeded the number of seeker profiles for SDA properties (n=652). This may suggest that there are not enough housing seekers who have SDA funding approved in their NDIS plans to match the available supply of SDA properties. Indeed, recent surveys have indicated that SDA properties are often standing vacant for at least 3 months[17].

[17] Wellecke et al. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation.

Figure 9. Comparison of supply and demand - listings for SDA and non-SDA properties (listing data) versus seekers' need for SDA and non-SDA properties (seeker data)



SDA properties

SDA properties are built to meet design standards across 5 categories: High Physical Support, Fully Accessible, Robust, Improved Liveability and Basic. Each category includes different design features and is supported by a different funding amount in peoples' NDIS plans. Older SDA properties that do not have any special design features may be enrolled as 'Basic', but this category is not available for New Build SDA.

The design categories of SDA properties listed on the Housing Hub are displayed in Figure 10. Consistent with the previous Housing Hub listings snapshot, High Physical Support was the most commonly listed design category, making up almost half (43%) of all SDA listings. This was followed by Fully Accessible (17%), Improved Liveability (16%), and Basic (13%) design. The least commonly advertised design category was Robust (11%).

Figure 10. SDA properties by design category

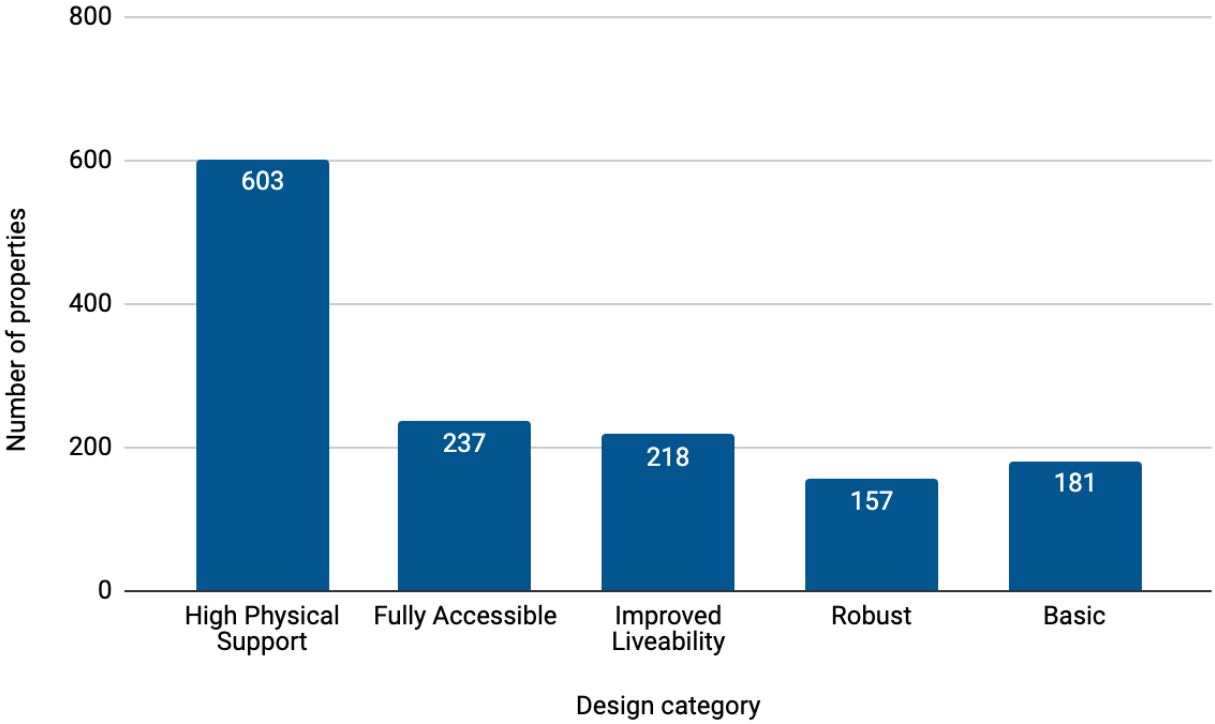
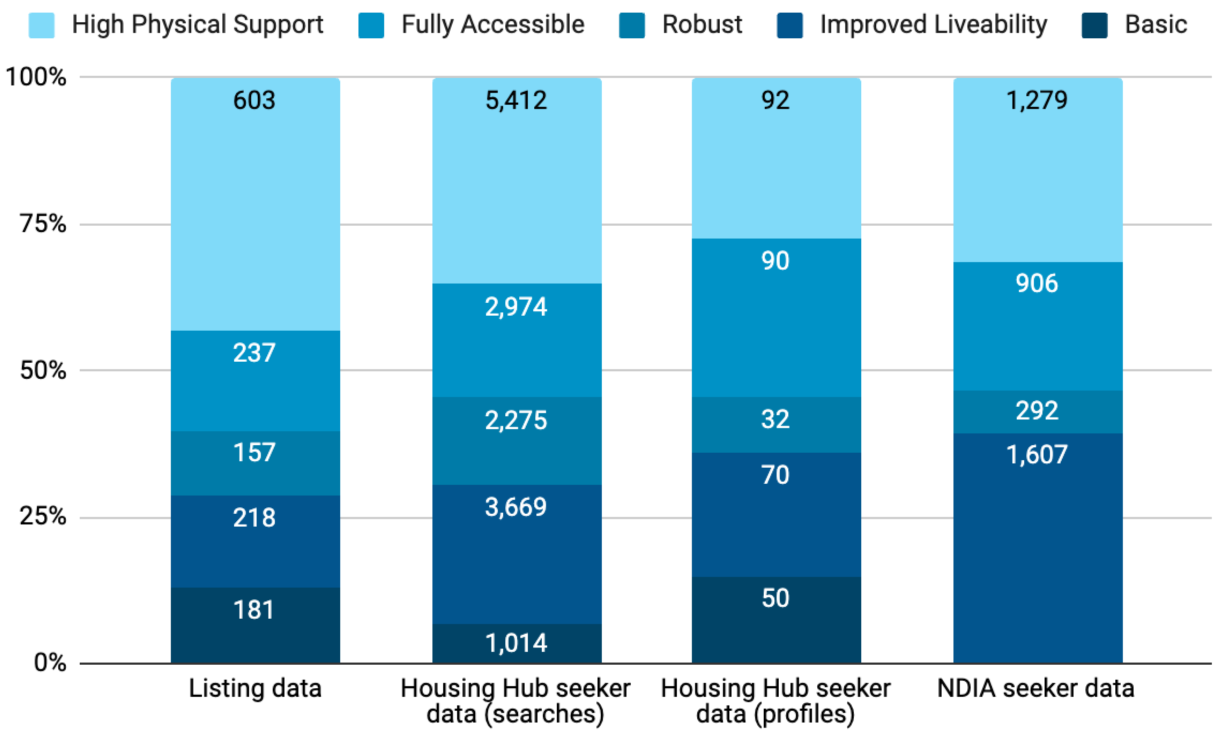


Figure 11 compares the above-shown proportion of SDA design categories to housing seekers' needs for the different SDA design categories, as reported by the NDIA[18] and the latest Housing Hub seeker snapshot[19]. As can be seen, the large proportion of High Physical Support properties (43%) appeared to slightly exceed the proportion of seekers looking for this design category on the Housing Hub (35% of Housing Hub searches, 28% of Housing Hub profiles). Conversely, the proportion of seekers needing Improved Liveability (24% of Housing Hub searches, 21% of Housing Hub profiles, and 39% of NDIA seeker data) was larger than the proportion of Housing Hub listings for this design category (16%).

[18] NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Table P. 12.

[19] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation.

Figure 11. Comparison of supply and demand - SDA properties by design category (Housing Hub listing data) versus seekers' need for SDA design categories (Housing Hub seeker data and NDIA seeker data[20])



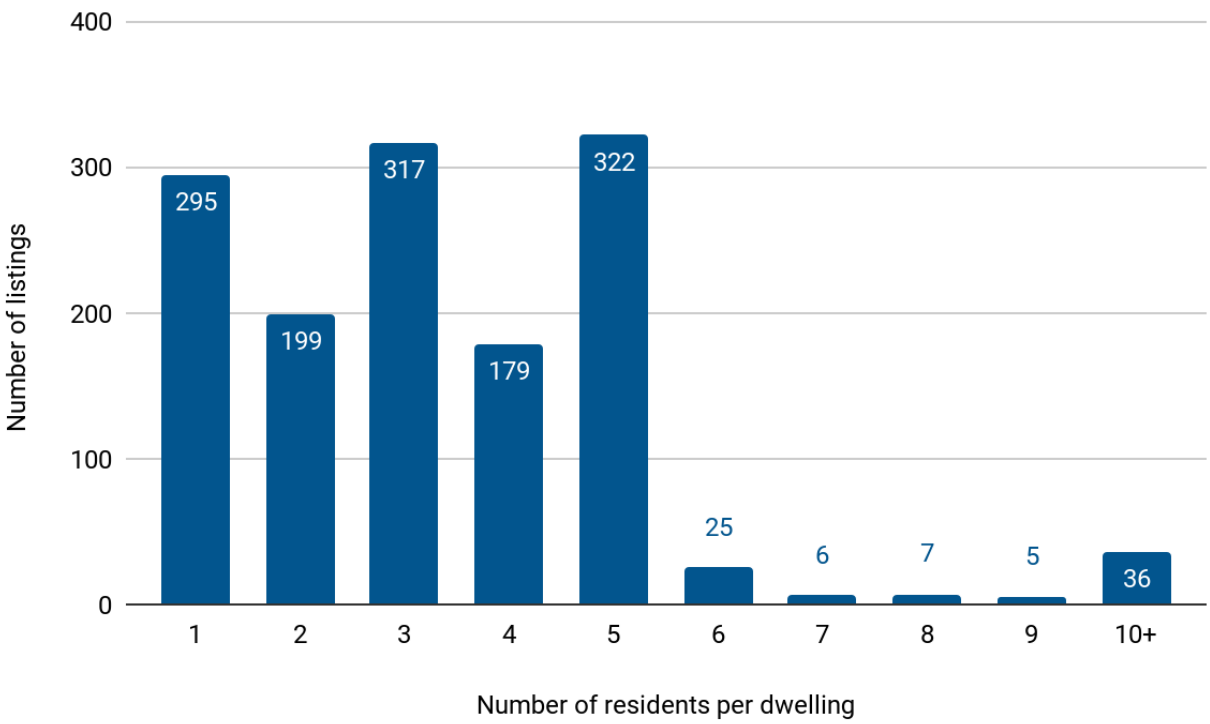
Note: The NDIA does not report on demand from participants with Basic design categories in their NDIS plans. Seekers were able to select multiple responses when conducting a search on the Housing Hub website.

Each SDA property has a specified number of SDA-eligible residents that can be accommodated in the dwelling. SDA properties accommodating more than 5 residents are being phased out and can no longer be built as new SDA. Figure 12 shows the number of listings on the Housing Hub for each number of residents per dwelling. The most commonly listed occupancy types were for 5 residents (23%), 3 residents (23%), and 1 resident (21%). Previous editions of the Housing Hub listings snapshot identified similar proportions, though there has been a consistent increase in the number of 3-resident dwellings since the first edition of the listings snapshot[21].

[20] NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Table P. 12.

[21] Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Figure 12. Number of listings by number of residents per dwelling



There are a number of property factors that determine the income that SDA providers will receive from the NDIS. The Pricing Arrangements for SDA[22] describe these factors and set out the amount of SDA funding that providers will be paid by the NDIS. People who wish to live in SDA properties must have adequate SDA funding included in their NDIS plan. Their NDIS plan will show the following:

- Design category – High Physical Support, Fully Accessible, Improved Liveability, Robust, Basic
- Building type – Apartment, Villa/Duplex/Townhouse, House, Group Home
- Number of SDA residents – 1 to 5
- Number of bedrooms – 1 to 5

Table 1 below shows the different types of SDA listings on the Housing Hub, split by design category, building type, and the number of SDA residents. Note that some of the totals in the table below differ from the Figures above, as not all SDA listings could be classified into the categories below due to missing data.

The most commonly listed SDA properties were High Physical Support Houses for 3 residents at 254 listings, followed by High Physical Support 1-resident apartments at 91 listings. Interestingly, the number of vacancies in High Physical Support houses for 3 residents has seen a strong increase since the first edition of the Housing Hub listings snapshot in June 2021[23], with the number of listings for this property type almost doubling from 149 listings to 254 listings.

[22] NDIA. (2022, July 1). *SDA pricing and payments*. National Disability Insurance Agency. **https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments**

[23] Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Table 1. SDA properties listed on the Housing Hub by building type, number of residents and design category

Building type + Residents	Design category					
	Basic	FA	HPS	IL	Robust	Total
Apartment 1 Resident	0	42	91	32	not possible*	165
Apartment 2 Residents	0	11	42	6	not possible*	59
Villa / Townhouse / Duplex 1 Resident	7	3	46	7	32	95
Villa / Townhouse / Duplex 2 Resident	5	17	27	13	11	73
Villa / Townhouse / Duplex 3 Resident	10	20	24	4	19	77
House 2 Resident	9	14	50	16	60	149
House 3 Resident	83	51	254	63	17	468
Group Home 4 Resident	24	22	26	17	8	97
Group Home 5 Resident	41	57	43	60	10	211
Total	179	237	603	218	157	1,394

* *Note: The Pricing Arrangements for SDA do not allow for Robust design in apartments. FA = Fully Accessible; HPS = High Physical Support; IL = Improved Liveability.*

A similar analysis was conducted for the number of listings on the SDA Finder, shown in Table 2. Similar to the SDA listings on the Housing Hub, High Physical Support houses for 3 residents and High Physical Support apartments for 1 resident were also commonly listed on the SDA Finder. However, in contrast to listings on the Housing Hub, the SDA properties with the *most* listings on the SDA Finder were 5-resident Group Homes, particularly for Basic design (84 listings) and Fully Accessible design (65 listings).

It is important to note that the SDA Finder lists every vacant dwelling separately, whereas Housing Hub listings can advertise a number of dwellings in 1 listing. Despite this, there were overall fewer SDA listings on the SDA Finder than on the Housing Hub. This may indicate that providers are less likely to use the SDA Finder compared to the Housing Hub to advertise their properties. Indeed, 84% of listings on the SDA Finder had a Housing Hub URL added as their primary webpage, further highlighting that providers are often using the Housing Hub website to advertise their SDA vacancies. As noted above in the Data section on p.8, the Housing Hub sends all listings data to the NDIA weekly to populate the SDA Finder, which may also explain the high percentage of SDA Finder listings having a Housing Hub URL.

The lower number of listings on the SDA Finder may also be due to the length that listings remain active on the website. While recent surveys[24] have indicated that it typically takes at least 3 months to fill an SDA vacancy, listings on the SDA Finder remain active for only 1 month after they have been published[25]. Thus, it is possible that listings are removed from the SDA Finder even though they may still be vacant, which may account for the lower number of available SDA properties on the SDA Finder compared to the Housing Hub.

Table 2. SDA properties listed on the SDA Finder by building type, number of residents and design category

Building type + Residents	**Design category**					
	Basic	**FA**	**HPS**	**IL**	**Robust**	**Total**
Apartment 1 Resident	0	1	58	6	not possible	65
Apartment 2 Residents	0	2	2	0	not possible*	4
Villa / Townhouse / Duplex 1 Resident	5	2	6	3	12	28
Villa / Townhouse / Duplex 2 Resident	4	0	6	5	5	20
Villa / Townhouse / Duplex 3 Resident	1	15	2	2	5	25
House 2 Resident	7	4	6	4	8	29
House 3 Resident	11	6	46	7	3	73
Group Home 4 Resident	33	16	22	7	6	84
Group Home 5 Resident	84	65	51	56	10	266
Total	145	111	199	90	49	594

* *Note: The SDA Pricing and Payments guide does not allow for Robust design in apartments. FA = Fully Accessible; HPS = High Physical Support; IL = Improved Liveability.*

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[24] Wellecke et al. (2022). *Specialist Disability Accommodation provider experience survey: June 2022*. Housing Hub and Summer Foundation.

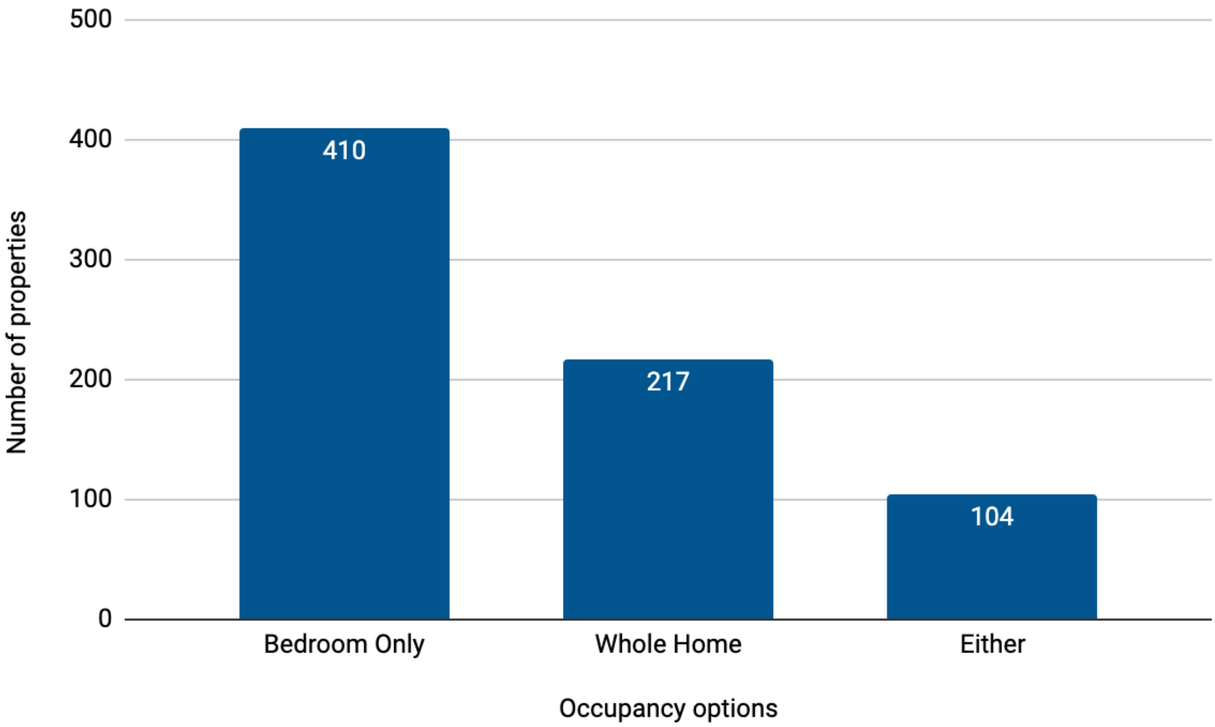
[25] NDIA (2022, August 8). *SDA dwelling enrolment and vacancies*. National Disability Insurance Agency. **https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-dwelling-enrolment**

Non-SDA properties

Figure 13 shows occupancy options for non-SDA properties. As can be seen, the majority of listings for non-SDA properties were for share-houses (56%), where tenants rent a bedroom. These are generally known as group homes, wherein people with disability not only share a home together but also share support services. In comparison, less than a third of non-SDA properties (30%) were offered as a whole home.

Similar to the previous listings snapshot[26], it is interesting to note that a relatively large proportion of listings (14%) indicated they could be tenanted as either a share house or a whole home. In most of these listings, it remains unclear how the property can be converted from a group home to an independent living place, or vice versa. It is important that providers clarify how these options would be implemented for potential tenants.

Figure 13. Occupancy options in non-SDA properties



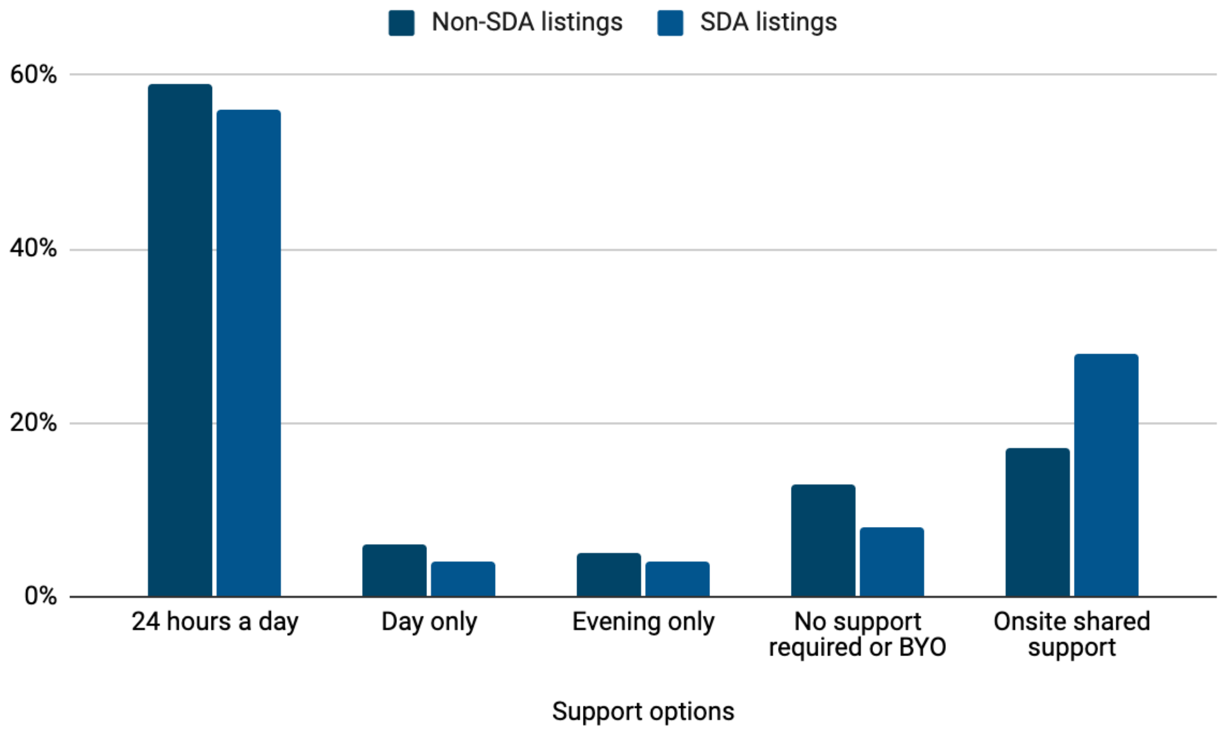
Support options in SDA and non-SDA properties

Figure 14 shows the support options offered in both SDA and non-SDA properties. Support options were compared using percentages, as there were more SDA than non-SDA properties listed on the Housing Hub.

As shown, full 24-hour support was the most commonly offered support option in both SDA (56%) and non-SDA properties (59%). This was followed by the option of onsite shared support, which was more commonly offered in SDA (28%) than non-SDA (17%) properties.

[26] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot.* Housing Hub and Summer Foundation.

Figure 14. Support options for tenants in SDA and non-SDA properties

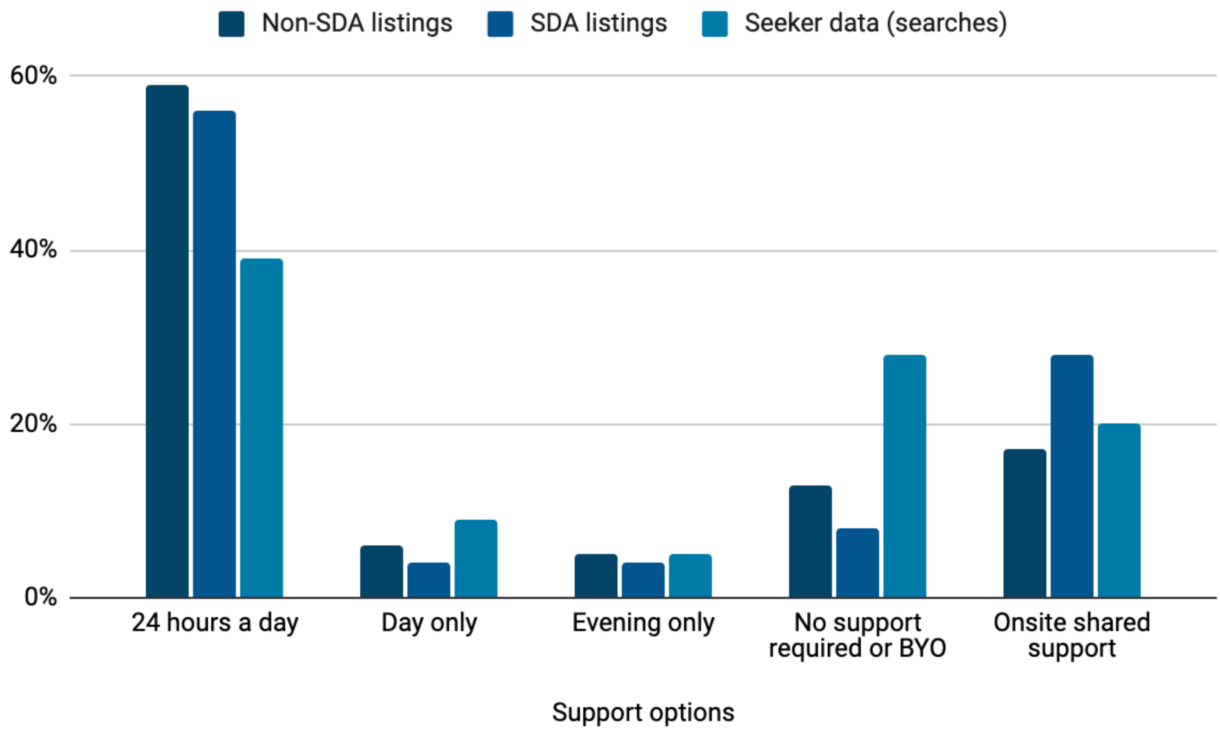


Note: A property could have multiple support options listed.

Figure 15 compares the support options offered in both SDA and non-SDA properties to seekers' support needs, as identified in the most recent Housing Hub seeker snapshot[27]. As can be seen, the support options offered in SDA and non-SDA properties were mostly aligned with seekers' support needs. However, the proportion of SDA (56%) and non-SDA (59%) listings offering 24-hour support was larger than the proportion of seekers (39%) needing this type of support. Conversely, housing that allows seekers to bring their own support appeared to be more commonly preferred by seekers (28%) than it was offered in SDA (8%) and non-SDA properties (13%).

[27] Wellecke et al. (2022, June). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation.

Figure 15. Comparison of supply and demand - support options for tenants in SDA and non-SDA properties (listing data) versus seekers' support needs (seeker data)



Note: A property could have multiple support options listed. Seekers were also able to select multiple options.

With the introduction of the NDIS, separating the provision of housing and disability support services has been encouraged. A core principle of the NDIS is that people with disability should have choice and control over who provides services to them, but this is limited if a person's housing and supports are provided as a bundled service. Thus, it is expected that support providers will not own or provide the home that residents live in under the NDIS[28].

It was anticipated that the transition to full separation of housing and support services would take some time. In the transition period, providers of both SDA and support were expected to provide tenants with 2 separate agreements and manage their conflicts of interest. However, even if SDA and support are being provided by 2 different entities, some SDA providers are forcing tenants to use a certain support provider to reside in their property. This not only limits tenants' choice, but is also a form of anti-competitive behaviour known as third line forcing which may be against the law if it substantially limits competition in the market[29]. Furthermore, while the separation is being actively encouraged in SDA properties, it is less clear how the separation of housing and support in non-SDA housing will occur. Often, the provider of non-SDA housing also provides support in the property.

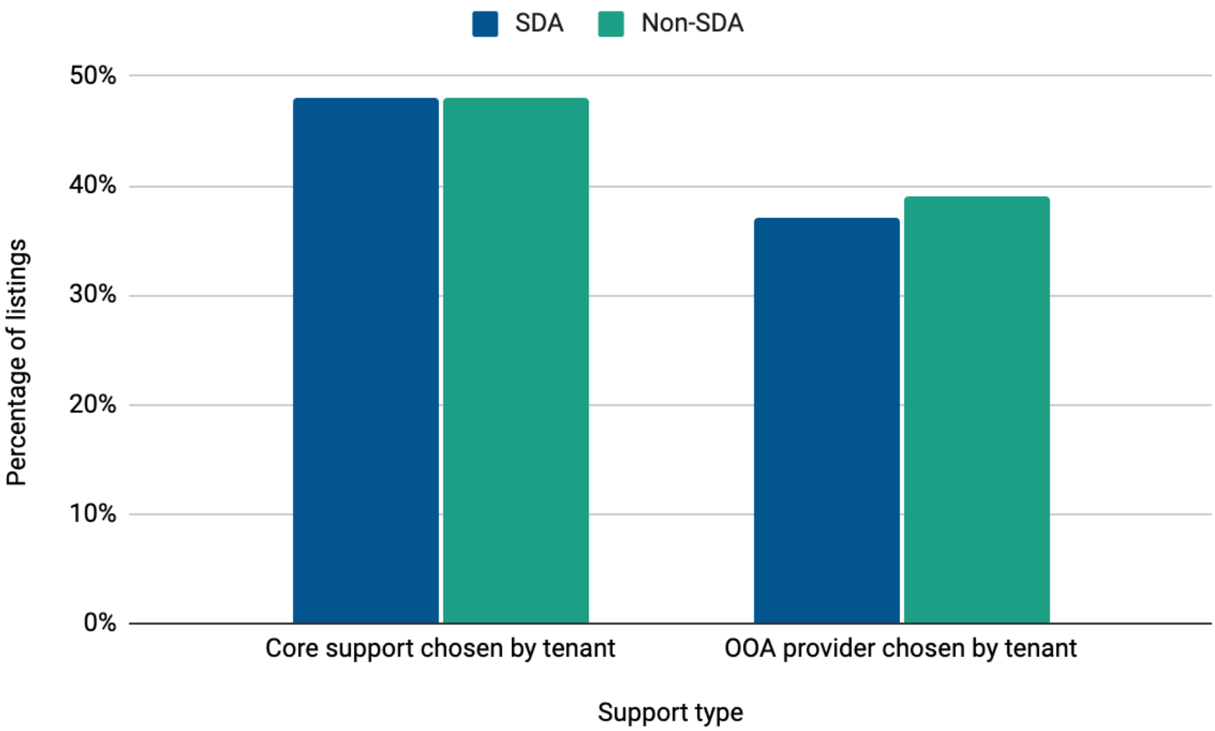
The Housing Hub is aiming to ensure that housing seekers can make an informed choice about properties to apply for by showing information on the support arrangements in each property. Therefore, when creating listings on the Housing Hub, providers are asked whether their properties enable tenants to have choice over their supports.

[28] Crabb, A, (2017). *Separating Housing and Support Services – A Toolkit for Providers*. Summer Foundation. **https://www.summerfoundation.org.au/resources/separating-housing-and-support-services/**

[29] Australian Competition & Consumer Commission. **https://www.accc.gov.au/business/anti-competitive-behaviour/exclusive-dealing**

The percentage of listings for SDA and non-SDA properties allowing tenants choice over their support is shown in Figure 16. Slightly less than half of SDA and non-SDA properties (48% each) indicated that they allow tenants to choose who delivers their core supports (that is, support with daily routines such as getting dressed, preparing meals, and accessing the community). The previous Housing Hub listings snapshot identified similar percentages for choice over core supports[30]. Encouragingly, there has been an increase in the percentage of non-SDA dwellings that enable tenants to have choice over onsite overnight assistance providers. This has increased from 28% in the previous Housing Hub listings snapshot to 39% in the current snapshot[31]. While this is an encouraging finding, it is concerning that more than half of all SDA and non-SDA properties continue to restrict tenants' choice over support providers.

Figure 16. Percentage of property listings that allow tenants choice over their supports



Note: OOA = Onsite overnight assistance.

Location of listings and housing seekers

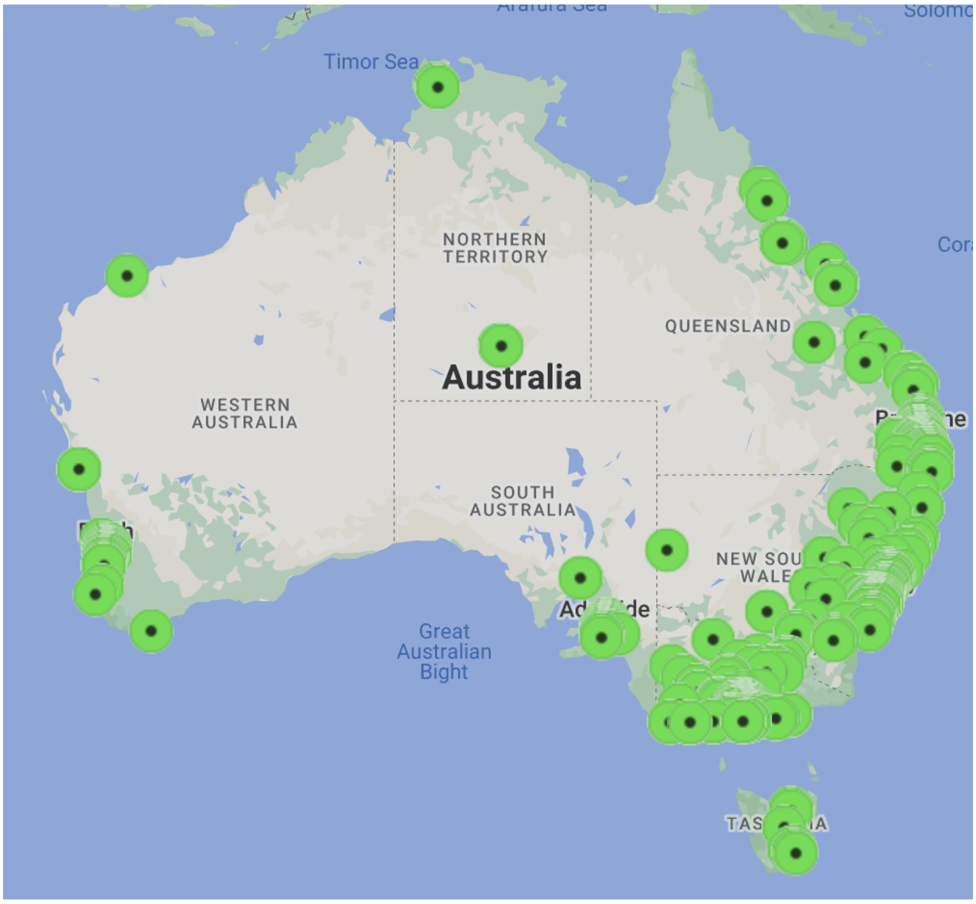
The map in Figure 17 shows the location of all listings published on the Housing Hub. As can be seen, the Housing Hub has property listings across all states and territories in Australia. Similar to the locations identified in previous editions of the Housing Hub listings snapshot[32], most of the listings were for properties in the eastern states, where the Housing Hub has a more established presence. These listings were mainly concentrated along the coastline and in capital cities.

[30] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

[31] Ibid.

[32] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Figure 17. Location of listings on the Housing Hub (n = 2,171)



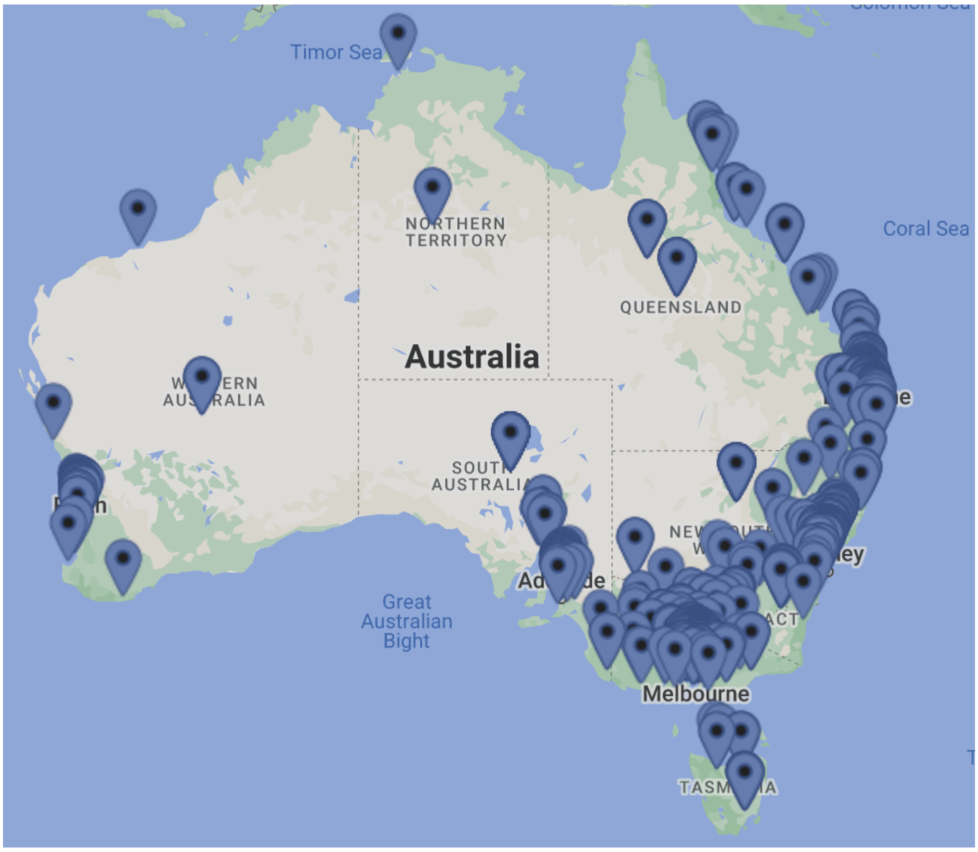
The map in Figure 18 shows the preferred living location of seekers on the Housing Hub. When compared to Figure 17 above, seekers' preferences appear to mostly align with the locations of properties, with most seekers looking for properties in the eastern states along the coastline and capital cities. However, it appears that there were slightly more housing seekers than properties in South Australia. Moreover, as noted in the previous listings snapshots[33], the demand for housing in regional areas did not seem to be well-matched with available properties on the Housing Hub.

As mentioned in the previous Housing Hub listings snapshot[34], it is possible that housing will need to be developed for individuals in regional areas by directly connecting them to providers, enabling providers to build housing to the needs and preferences of housing seekers in these locations. To connect this demand with new supply, the Housing Hub intends to create a new feature where housing providers are able to promote their services and connect with housing seekers to build for people who have no options in their area. The Housing Hub is also working with housing providers who can commit to developing housing for people based on their needs – or building for demand. This represents a positive development in the SDA market, which has been largely supply-led to date.

[33] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

[34] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Figure 18. Seekers' preferred living locations (n = 2,085)



Property features

A review of the most commonly listed features on property listings was conducted and compared to the most frequently requested features by housing seekers (as reported in the latest Housing Hub seekers snapshot report[35]). These features are shown in the table below.

As can be seen, the top 15 features listed by providers and the top 15 features preferred by seekers were very similar, with only slight differences in the ranking between the 2 groups. Only 2 features did not align between Housing Hub seekers and Housing Hub listings - these are highlighted in blue.

The 2 features that were commonly listed by providers but not commonly searched for by housing seekers were 'Intercom' and 'Emergency power backup'. These features may be commonly listed because they are property requirements for High Physical Support SDA. It should also be noted that 'Emergency power backup' is not an option that seekers can add to their list of preferred features, which may explain this discrepancy.

The 2 features that were commonly preferred by seekers but not commonly listed by providers were 'Lift in building', and 'Parking'. Lifts may not be commonly listed because they may not apply to all dwelling types, such as houses or villas.

[35] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation.

Most reported features in listings

1. Cooling
2. Heating
3. Built-in wardrobes
4. Outdoor area
5. Dishwasher
6. Accessible features
7. Wheelchair accessible
8. Broadband internet available
9. Furnished
10. Ensuite
11. Fire sprinklers
12. Pets allowed
13. Strong and robust construction
14. **Intercom**
15. **Emergency power backup**

Most popular features in seeker profiles

1. Cooling
2. Heating
3. Accessible features
4. Outdoor area
5. Built-in wardrobes
6. Broadband internet
7. Wheelchair accessible
8. Dishwasher
9. **Parking**
10. Pets allowed
11. Ensuite
12. Strong walls/doors/glass/soundproofing
13. Fire sprinklers
14. **Lift in building**
15. Furnished

Listing Performance

The end goal for housing providers is to tenant their property as quickly as possible with a person who wants to live there and is suited to the property. Understanding what elements of a listing are related to achieving this end goal is crucial for housing providers to improve the performance and success of their listings.

While time to tenant the property is likely the most direct measure of a listing's success, the Housing Hub does not currently have access to this data. However, Housing Hub data can indicate seekers' engagement with a listing, which represents a valuable indirect measure of a listing's performance. These engagement measures are:

- Number of enquiries through to the provider
- Number of times the listing has been viewed
- Time spent on the listing compared to others

An overview of these 3 measures was provided in the first edition of the Housing Hub listings snapshot report[36]. The report indicated that the number of enquiries was 1 of the best measures of performance. Therefore, the current snapshot will further examine listings' performance as measured by the number of listing enquiries. Note that the below numbers of enquiries refer to the number of enquiries that listings received during a **1-month** period, between 17 June - 17 July.

As described in the data section on p.8, 60 listings on the Housing Hub were randomly selected to investigate how the number of enquiries relates to different features of listings. During the 1-month period, the 60 listings received an average of 2 enquiries per listing. The listing with the most enquiries received 12 enquiries, while 23 listings received only 1 enquiry.

Location

The number of enquiries across the 60 selected listings was analysed based on the locations of the properties. The location of properties was classified into either 'metropolitan' or 'regional' using the Department of Agriculture, Water and the Environment[37] postcode classifications.

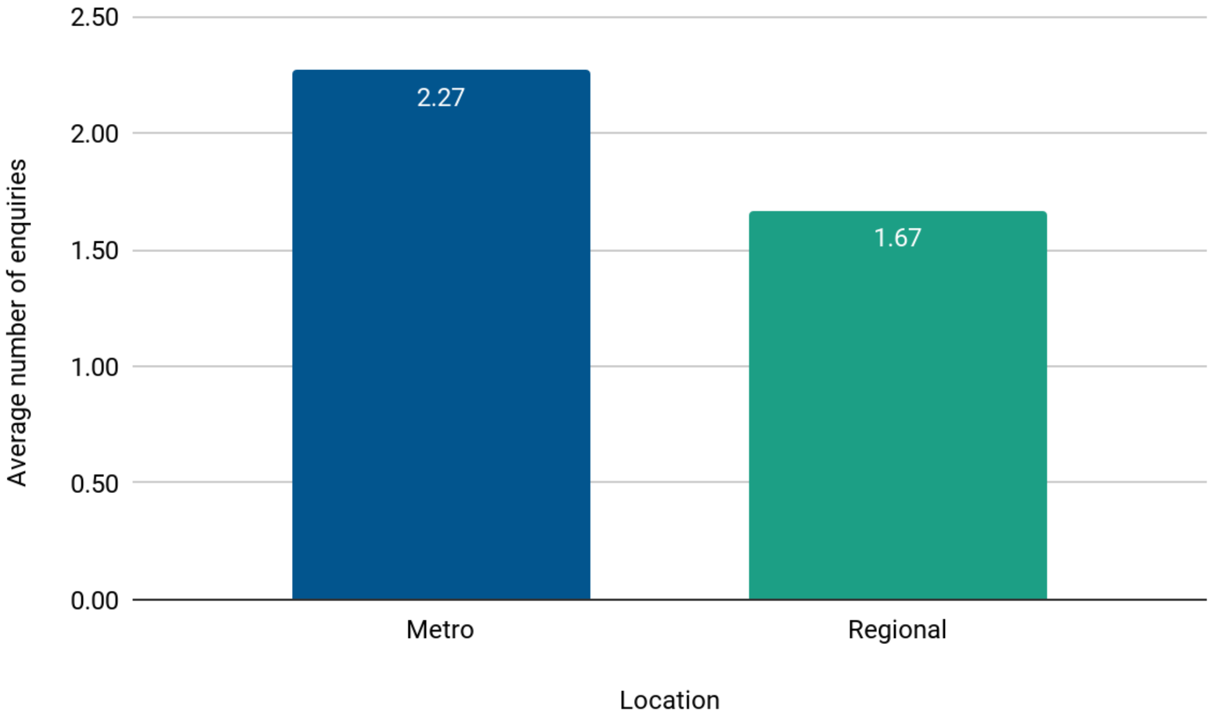
Of the 60 selected listings, 48 properties were located in metropolitan areas, and 12 were located in regional areas. As seen in Figure 19, housing in metropolitan areas received, on average, slightly more enquiries (2.27 enquiries) than housing located in regional locations (1.67 enquiries). This is consistent with the previous Housing Hub seeker snapshot[38], which reported a preference for housing in metropolitan areas.

[36] Rathbone et al. (2021, June). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

[37] Australian Government. (2022, March 10). *Postcode delivery classifications*. **https://www.agriculture.gov.au/biosecurity-trade/import/online-services/delivery-postcode-classifications**

[38] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation.

Figure 19. Average number of enquiries during 1 month based on location (n=60)



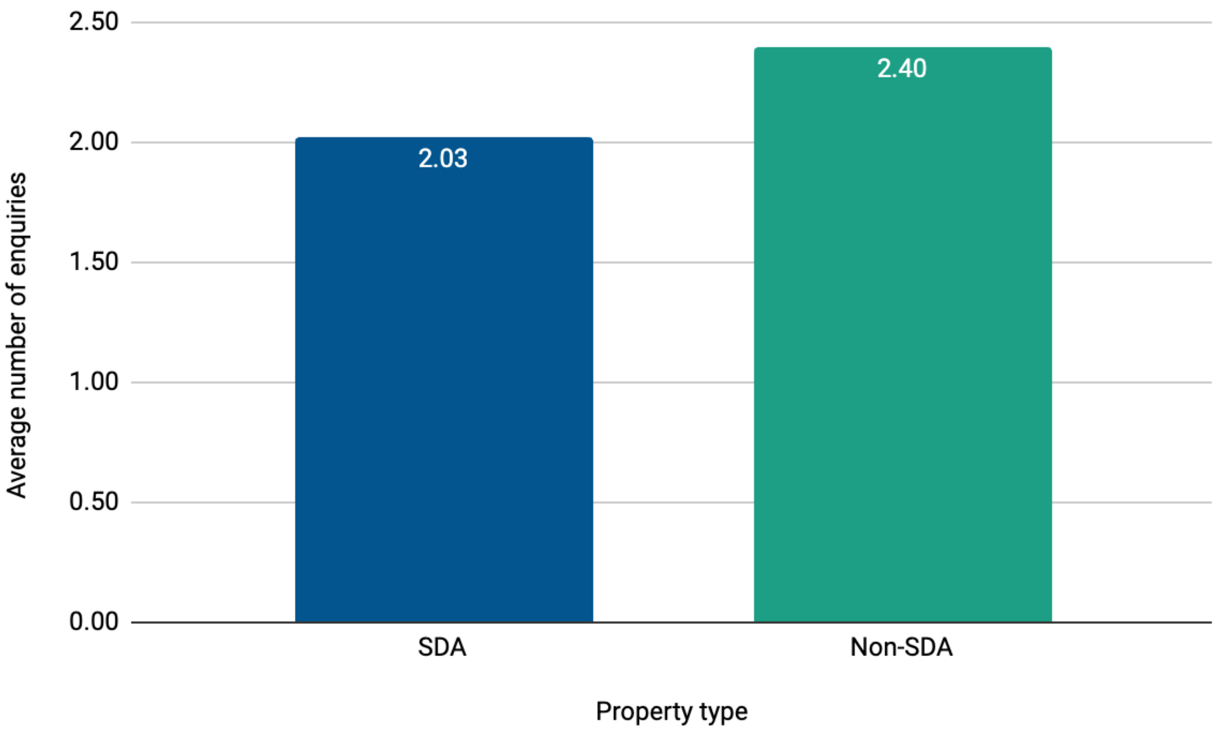
Note: There were 48 listings for Metro, and 12 listings for Regional.

Property type

The number of enquiries across the 60 selected listings was also analysed based on the property being SDA or non-SDA housing. Of the 60 listings, 20 were for non-SDA and 40 were for SDA properties.

Analysis of the 60 listings, as seen in Figure 20, showed that SDA and non-SDA properties received on average a similar number of enquiries, though the number of enquiries was slightly higher for non-SDA properties (2.40 enquiries) than SDA properties (2.03 enquiries).

Figure 20. Average number of enquiries during 1 month based on property type (n=60)



Note: There were 40 listings for SDA, and 20 listings for Non-SDA.

Brochure

The number of enquiries was also compared between listings that provided a brochure versus those that did not provide a brochure. Across the 60 randomly sampled listings, 28 included a brochure and 32 did not include a brochure.

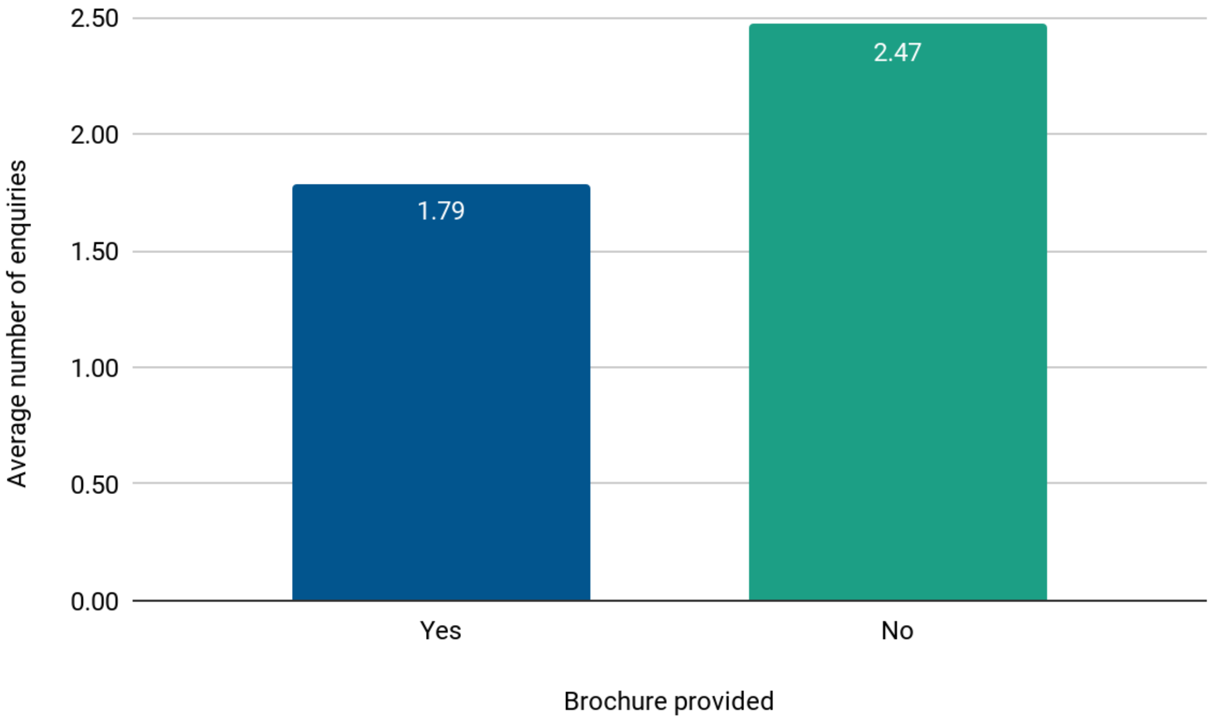
As seen in Figure 21, listings without a brochure received on average almost 1 enquiry more (2.47 enquiries) than listings with a brochure (1.79 enquiries). This is consistent with findings from the previous listings snapshot, which also indicated that listings without a brochure tend to perform better[39].

As explained in the previous listings snapshot[40], it is possible that listings with a brochure receive fewer enquiries because some brochures are not well developed and may therefore detract from the perceived quality and professionalism of the listing and property. Alternatively, it is possible that listings with a brochure provide more information and therefore seekers do not need to contact the provider with questions about the property. Thus, while listings without brochures may receive more enquiries, these enquiries may not necessarily be from suitable tenants.

Taken together, providing a good quality brochure may not lead to *more* enquiries; however, it may lead to *better quality* enquiries as it allows seekers to make more accurate decisions about the suitability of the housing for their specific needs.

[39] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.
[40] Ibid.

Figure 21. Average number of enquiries during 1 month based on the provision of a brochure (n=60)



Note: 28 listings included a brochure and 32 did not include a brochure.

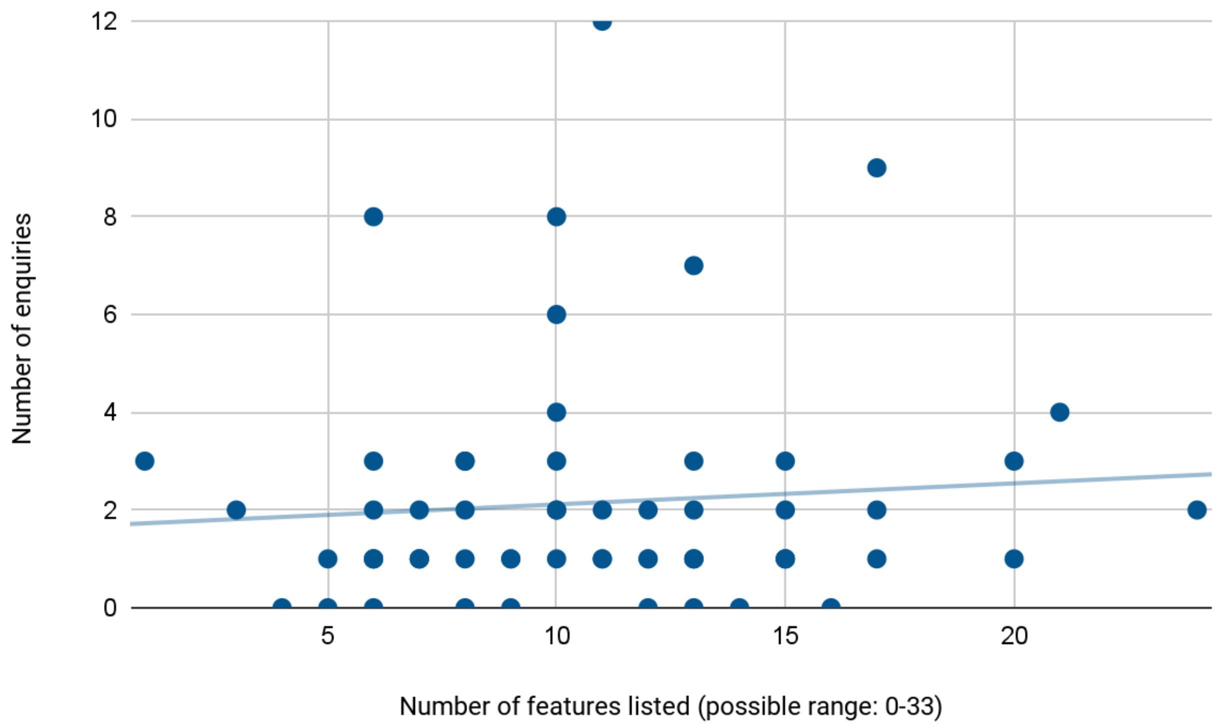
Features

Providers are able to list various property features for each listing, with the maximum number of features that can be listed being 33. The relationship between the number of listed property features and the number of enquiries per listing was assessed. Note that features that only applied to a certain building type (for example, lifts only apply to apartments) were excluded to enable a comparison across different build types.

As seen in Figure 22, as the number of listed features increased, so did the number of enquiries. However, this relationship was relatively weak, which is consistent with findings from the previous listings snapshot[41].

[41] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.

Figure 22. Relationship between number of enquiries during 1 month and the total number of listed features (n=60)



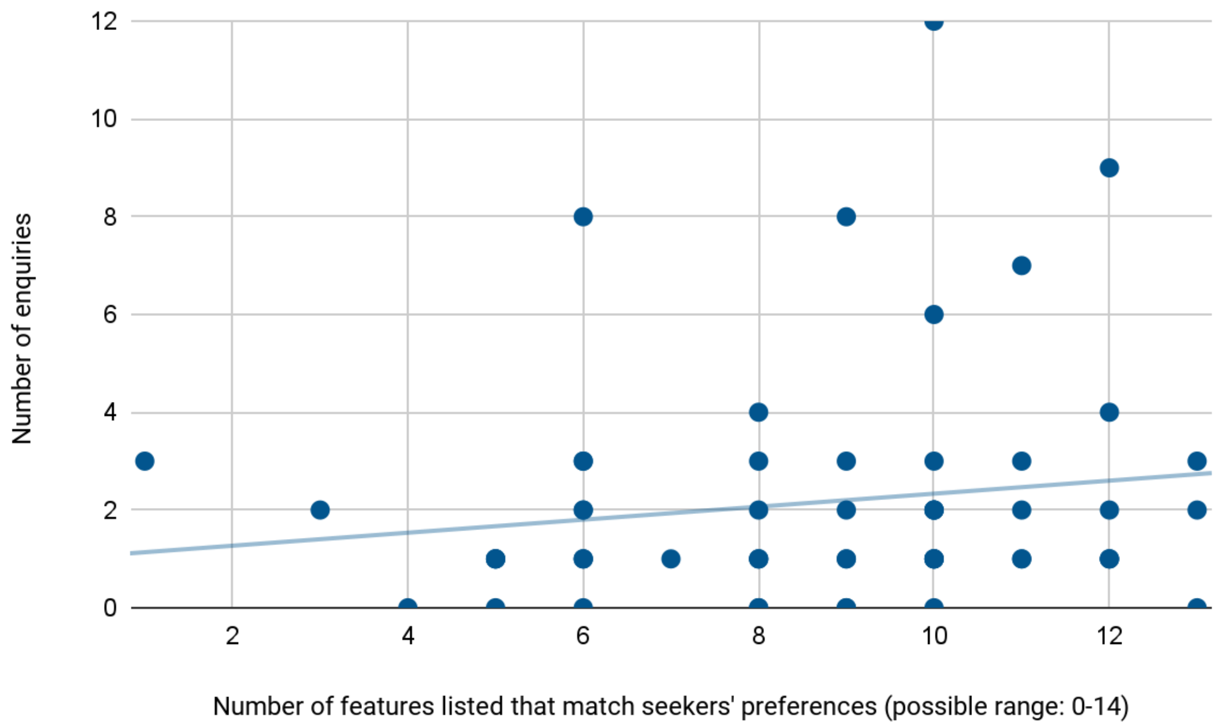
As mentioned in the previous listings snapshot[42], it is possible that the performance of a listing is less related to the *number* of features and more so related to *what* features are listed. Therefore, the current listings snapshot investigated the relationship between listing performance and the *content* of listed property features. More specifically, it was investigated whether including property features that match seekers' preferences is related to receiving more enquiries.

To assess this, the number of listed features that match the most popular property features among housing seekers (as identified in the most recent Housing Hub seeker snapshot[43]) was counted and related to the number of enquiries. A list of these features is provided above on p.31. As with the above feature analysis, features that only applied to a certain building type (such as lifts) were excluded. Therefore, the maximum number of "popular" features that a listing could include was 14.

As seen in Figure 23, there was a positive relationship between the number of enquiries and the number of property features on a listing, that match seekers' preferences. Thus, listings that included more features that aligned with seekers' preferences tended to receive more enquiries. Although this was a relatively weak relationship, the relationship appeared to be slightly stronger than the association between enquiries and the total number of features shown in Figure 22 above. This further highlights that it is important to not just include more features in a listing but also to ensure that the features listed match what seekers are looking for in a property.

[42] Wellecke et al. (2022, February). *Housing Hub Listings Snapshot*. Housing Hub and Summer Foundation.
[43] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation.

Figure 23. Relationship between the number of enquiries during 1 month and the number of features matching seekers' preferences (n=60)



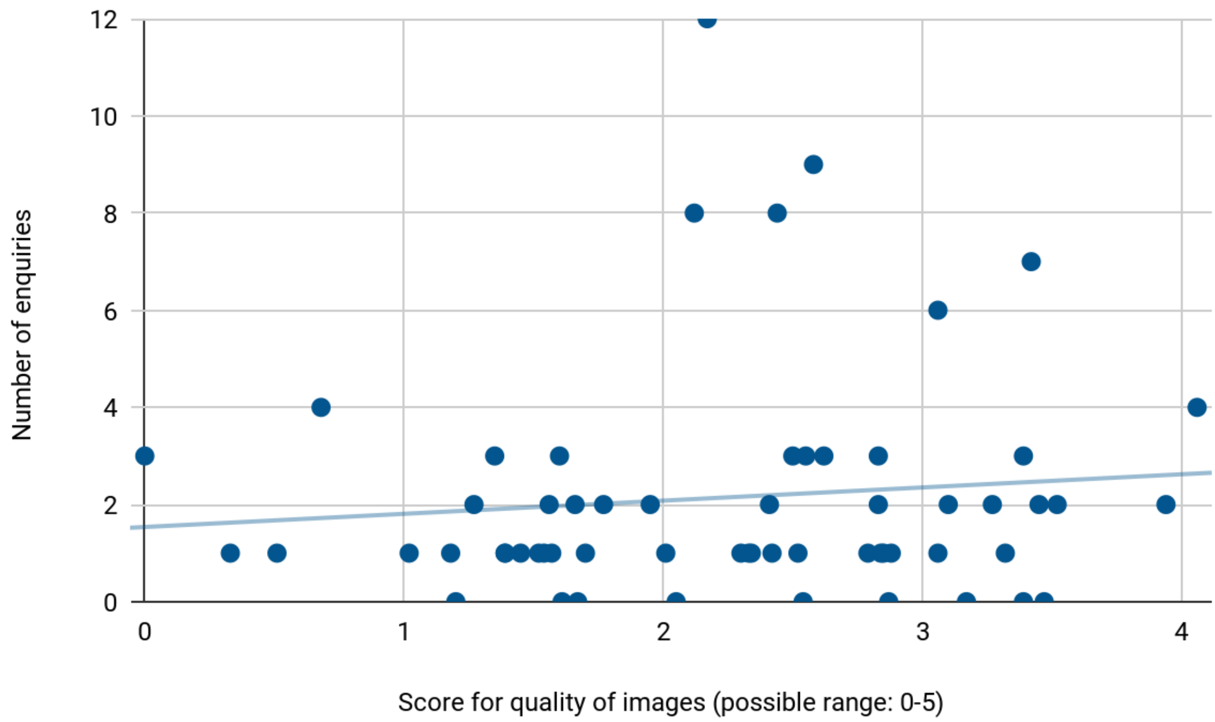
Images

The previous Housing Hub listings snapshot showed that the quantity of housing images in a listing was not related to a listing's performance. Therefore, the current listings snapshot explored whether the *quality* of housing images relates to listing performance.

The Housing Hub conducted a focus group with people with lived experience of disability to better understand what it is that they are looking for in images of housing on the Housing Hub when making decisions about where they want to live. This focus group resulted in a checklist that housing providers can use to ensure their listings feature high-quality housing images. For the purpose of this snapshot, the checklist was converted into a rating tool that was used to assess the quality of the images of the 60 randomly selected listings. Each listing could receive a score between 0-5, with higher scores indicating higher quality images.

The relationship between the quality of the images in the 60 listings and the number of enquiries is shown in Figure 24. As can be seen, listings that received higher scores on the rating tool (meaning they included higher quality housing images) tended to receive slightly more enquiries.

Figure 24. Relationship between the number of enquiries during 1 month and the quality of housing images (n=60)



Note: Higher scores indicate higher quality images

To assess the relationship between listing performance and the quality of images in further detail, the checklist was broken down into 5 subsections according to the type of detail being assessed. The subsections were: (1) content of images, (2) number and order of images, (3) appearance of images, (4) customer preferences and needs, and (5) other Housing Hub listing tools. For each subsection, the possible scores ranged between 0-1. A summary of these subsections is provided below.

(1) Content of images

Images cover all main areas inside and outside of the property, including photos of accessibility features where appropriate.

(2) Number and order of images

Listings should include a minimum of 7-10 photos. The first image shows either the front of the property or the main living space.

(3) Appearance of images

Images should be taken using bright natural light and professional photography services, and images should provide an accurate representation of the property to enable seekers to get a real feel for the size of the property. If applicable, images should be clearly identifiable as artist impressions or stock photos.

(4) Consideration of customer needs and preference

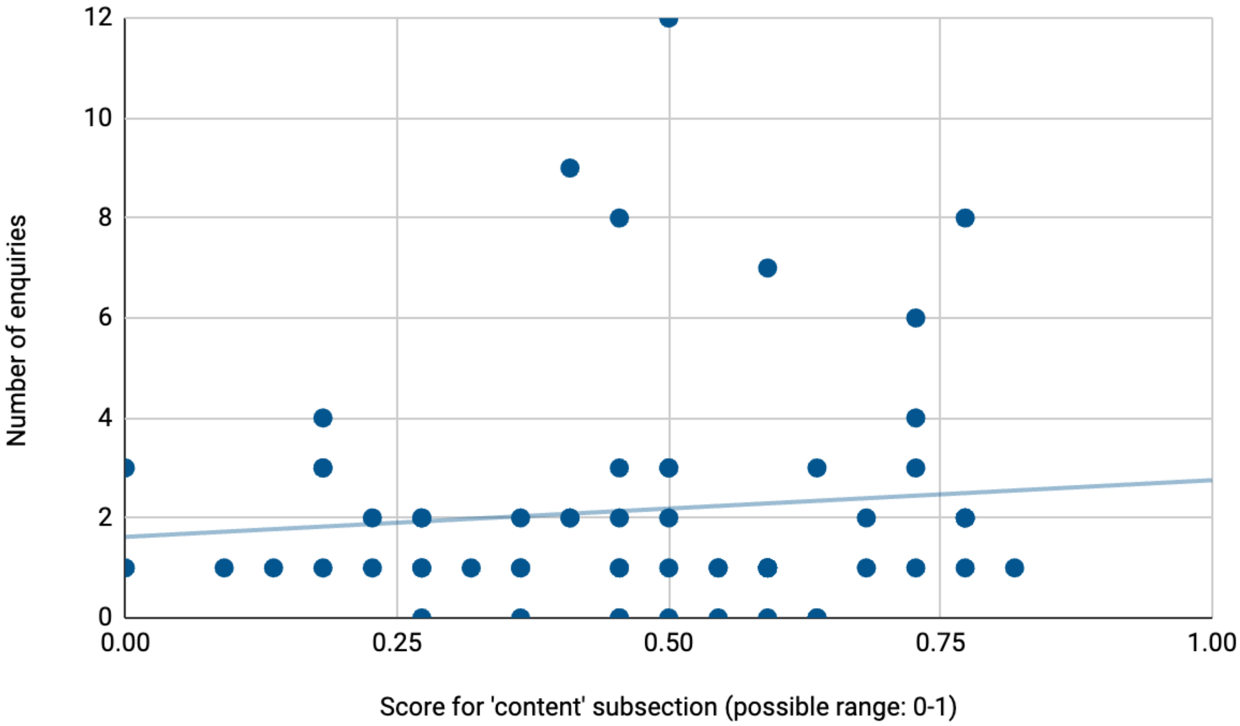
If the property is being marketed towards a particular disability group (such as people with mobility impairment), then the images should show the accessibility features provided for that group.

(5) Other Housing Hub listing tools

Housing Hub listings should use additional listing options like adding a video tour, including information about the local area and providing a floor plan. The floor plan should show accurate measurements and/or link images from the listing to show their position in the house.

The subsection ‘content of images’ assesses whether all rooms and areas inside and outside of a property are shown. As seen in Figure 25, there was a slight positive relationship between the content of images and the number of enquiries. Therefore, the better the content of images, the higher the number of enquiries a listing received.

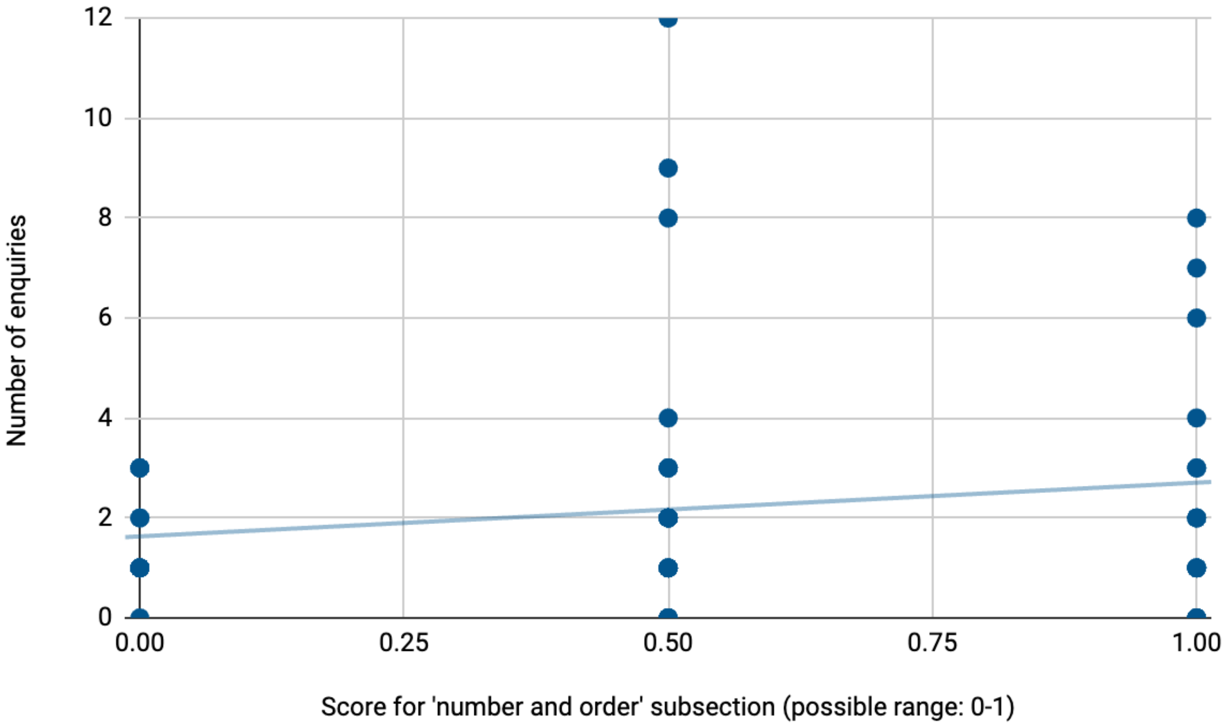
Figure 25. Relationship between the number of enquiries during 1 month and the content of housing images (n=60)



Note: Higher scores indicate better content of the housing images

The second subsection ‘number and order of images’ includes detail about the first image visible on the listing as well as the total number of images provided in a listing. As seen in Figure 26, the higher the score for image number and order, the higher the number of enquiries the listing received.

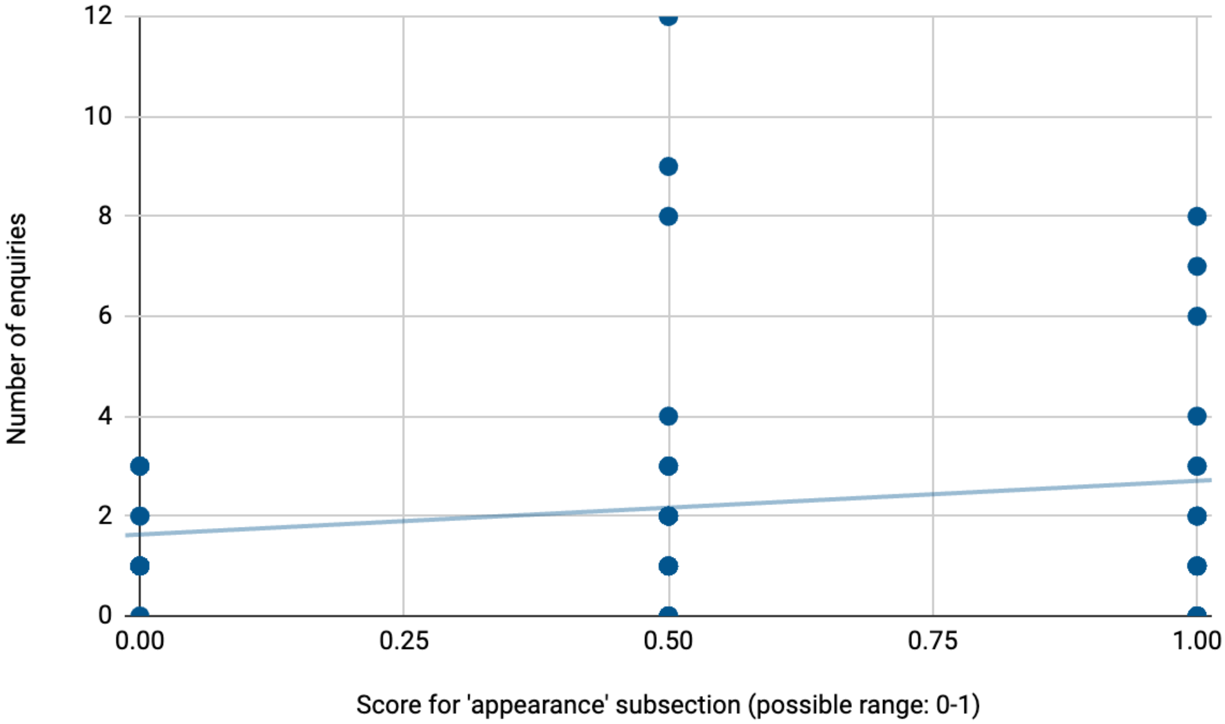
Figure 26. Relationship between the number of enquiries during 1 month and the number and order of housing images (n=60)



Note: Higher scores indicate a better number and order of images

The subsection for the 'appearance of images' assesses the visual and aesthetic appearance of images, such as the perceived professionalism of the images, appeal and cleanliness of the property, and ability to estimate the size of the property. Similar to the findings for the other subsections, listings with a better visual appearance of images received a higher number of enquiries. See Figure 27.

Figure 27. Relationship between the number of enquiries during 1 month and the appearance of housing images (n=60)

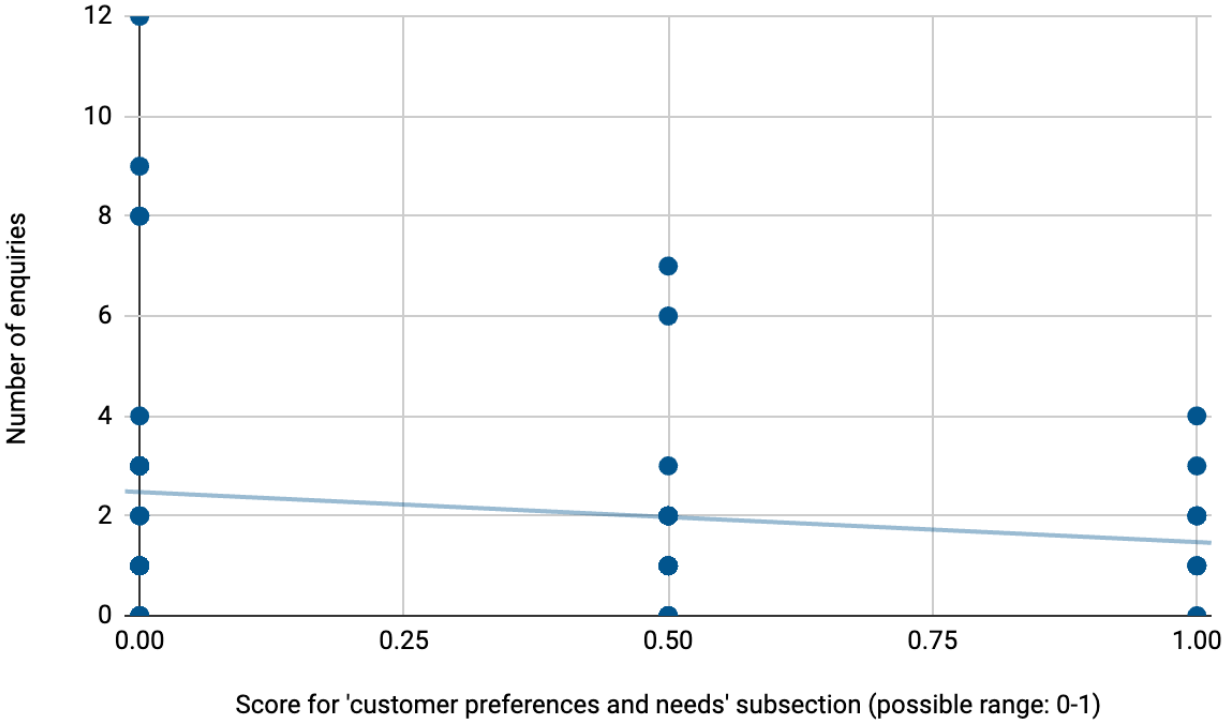


Note: Higher scores indicate a better visual appearance of images

The subsection ‘customer preferences and needs’ assessed whether images highlighted accessibility features that are important to people with disability. Interestingly, among the 60 randomly selected listings, there was a slight negative relationship between the score for ‘customer preferences and needs’ and number of enquiries, such that images that better highlighted accessibility features tended to receive a lower number of enquiries. See Figure 28.

It is possible that this was partly due to the specific accessibility features listed in the checklist that was used to assess the quality of images. More specifically, the accessibility features in the checklist focus heavily on the needs and preferences of people with high physical support needs, partly because most focus group participants who contributed to the development of the checklist were living in High Physical Support SDA properties. Therefore, the accessibility features listed in the checklist may not be applicable to all seekers of accessible housing options, particularly for seekers of non-SDA housing options. Therefore, it is important that providers use this subsection of the checklist as guidance only and ensure that the content of the images aligns with the unique needs and preferences of the specific audience their property is targeting.

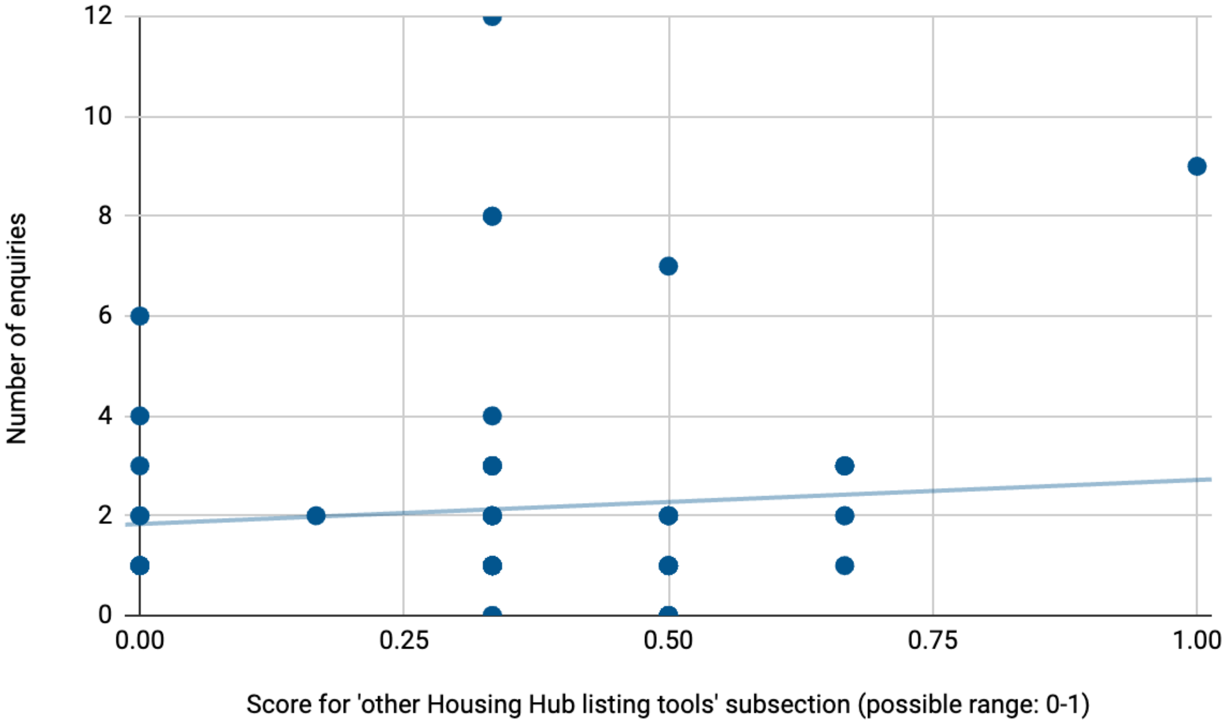
Figure 28. Relationship between the number of enquiries during 1 month and the consideration for customer preferences in housing images (n=60)



Note: Higher scores indicate that images better highlight how the property meets the needs and preferences of people with disability

The subsection for ‘other Housing Hub listing tools’ assesses whether listings use other features available for Housing Hub listing, such as a map in the local area guide, a floor plan and a video tour of the property. Including these features can complement the information conveyed in images, and may thereby enhance the quality of the images. As seen in Figure 29, there was a positive relationship between the use of other Housing Hub tools and the number of enquiries, though this relationship appeared relatively small.

Figure 29. Relationship between the number of enquiries during 1 month and and the use of other Housing Hub listing tools (n=60)



Note: Higher scores indicate that images used more Housing Hub listing tools

Taken together, there was a small relationship between the overall quality of images and the performance of a listing. This relationship was also evident when looking at specific aspects of images, except for the subsection 'customer preferences and needs'. While the quality of images does appear to be related to the performance of a listing, it is important to note that the identified relationships were relatively weak. This was to be expected, given that the quality of images may enhance a person's interest in a property but is unlikely to be the only factor taken into account by seekers when looking for their new place to call home.

Takeaways from this analysis of listing performance

Housing providers should ensure that quality listings are created in order to attract more interest from housing seekers for their properties. The above analysis highlights the following Housing Hub listing tools to generate more enquiries from housing seekers:

1. The Housing Hub has been designed to include listing features that assist both seekers and providers to find a good match quickly and easily. Therefore, try to fill out as many property features as possible, and ensure that the features housing seekers are looking for are highlighted. Refer to the Housing Hub seeker snapshots for an overview of the most popular housing features among seekers.
2. Focus on quality over quantity of images for property listings. Using the Housing Hub's image checklist can help you provide better images to market your property.
3. If including a brochure, ensure it is well designed and adds value to the listing on the Housing Hub website. If you are not including a brochure, ensure that the listing provides sufficient detail for seekers to assess the suitability of the property.
4. Be aware that listings for properties in regional areas may receive slightly fewer enquiries than listings in metropolitan areas. Boost the performance of these listings by using the above suggestions to improve the overall quality of the listing.

Housing Hub Listing Quality Service

The Housing Hub is now offering a free quality assessment service for listings on the Housing Hub. This service will help ensure that listings perform to their potential and are meeting the needs of housing seekers.

Each month, a report is generated that identifies Housing Hub listings that have missing data in key areas. Members of the Housing Hub team with personal experience of searching for accessible housing review these listings and develop recommendations for providers on how the listings may be improved. Providers are emailed the recommendations and supported by phone to make the recommended updates to their listings.

The Housing Hub is introducing this initiative to help providers get more out of the Housing Hub and to ensure housing seekers have access to the information needed to make an enquiry for a new home.

What does the data say?

This third edition of the listings snapshot report provided up-to-date data on the accessible housing market on the Housing Hub, including information about housing providers and their listings as well as comparisons between supply and demand. With more than 1,500 housing providers using the Housing Hub and an average month-on-month growth of 3% of provider sign-ups in 2022, the data in this report can provide significant insights into the current housing market.

The data reviewed revealed the following about the providers and listings on the Housing Hub:

- While the Housing Hub has providers in all states and territories in Australia, most providers were located in the eastern states.
- The most common housing providers on the Housing Hub were non-SDA providers, followed by STA and SDA providers.
- Almost all properties listed were for rent, with most of these being offered on an ongoing lease. This broadly aligned with the large number of seekers looking for ongoing rental properties on the Housing Hub, though a small proportion of seekers also indicated they would like to purchase a property.
- SDA properties made up 66% of listings. This proportion was slightly larger than the proportion of seekers looking for SDA properties on the Housing Hub. The predominant design categories listed were High Physical Support (43%), Fully Accessible (17%) and Improved Livability (16%) design, which largely aligned with housing seekers' SDA design needs.
- Both SDA and non-SDA properties were most commonly offered as share houses, with 3-resident houses being the most common occupancy type for SDA.
- Both SDA and non-SDA properties frequently offered support for 24 hours a day. 24-hour support was also the most frequently searched for support option among housing seekers. However, a relatively large proportion of seekers also indicated they would like to bring their own support, which was not often allowed within SDA and non-SDA properties.
- The 5 property features most frequently listed on the Housing Hub listings were: (1) cooling, (2) heating, (3) built-in wardrobes, (4) outdoor area, and (5) dishwasher. All of these features were also commonly needed or preferred by housing seekers.

Providers list properties to generate quality enquiries from suitable housing seekers. This report provided an analysis of the relationship between the usage of Housing Hub listing tools and the number of enquiries across 60 randomly selected listings. Findings of this analysis may act as a benchmark that providers could use to compare the performance of their own listings. The analysis also revealed the following suggestions to help boost the performance of listings:

- Fill out as many property features as possible, and ensure to list features that match housing seekers' needs and preferences.
- Include high-quality images by using the Housing Hub's checklist for housing images.
- Ensure that brochures are well-designed and add value to the listing.
- Pay particular attention to the quality of listings for properties in regional areas, as these tend to have slightly lower performance than properties in metropolitan areas.

Together, the findings in this report provide a snapshot of the current housing supply on the Housing Hub as well as a comparison of supply and demand. It is hoped that this report, along with the Housing Hub's seeker snapshot report[44], provides a comprehensive overview of both supply and demand in the accessible housing market on the Housing Hub.

[44] Wellecke et al. (2022, June). *Housing Seeker Snapshot.* Housing Hub and Summer Foundation.

Housing Hub services for housing providers

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.

Developments in 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 free to use the Housing Hub to create property listings and receive inquiries from prospective tenants.

Generalised data resulting from housing seeker profiles on the Housing Hub can help build an understanding of the demand for accessible housing. With insights into what types of housing (and housing features) are desired in certain locations, providers can build to address demand with greater certainty. The Housing Hub regularly releases data insights to the market at no cost, while more detailed analyses are available to housing providers for a fee. For example, a data report on the types of housing and features desired by seekers in a given Local Government Area can be developed on request. See housinghub.org.au/for-housing-providers for more information.

For a fee, 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 of more than 8,000 housing seekers.

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.

The Housing Hub also offers a tenant matching service for providers of high-quality SDA on a fee-for-service basis. The Housing Hub team identifies prospective tenants who may be a good fit for the SDA design category and features of the property, then supports prospective tenants to secure SDA funding and, if they wish, to apply for a vacancy at the property.

The Housing Hub's Lived Experience Facilitators are people with disability who currently live in SDA or other accessible housing, or are currently working towards a housing outcome that is right for them. Our team of Lived Experience Facilitators run regular information and capacity building events for people with disability, families and supporters. For a fee, the team can also provide expert support to housing providers and vendors who wish to learn more about the cohort of people they are developing for, co-design or get input into their future builds, get insights into the preferences of prospective tenants, or build the capacity of their workforce.

For more information on the Housing Hub's suite of services for housing providers and vendors, see housinghub.org.au/for-housing-providers or contact the Housing Hub's Customer Solutions Coordinator via email or by phoning 0497 814 567.

The Summer Foundation's role in the SDA Market

The following content aims to provide clarity on any perceived conflicts of interest between the Housing Hub team, Summer Foundation policy and research projects, and Summer Housing.

Summer Foundation

Established in 2006, the Summer Foundation is a not-for-profit organisation that is committed to resolving the issue of young people living in aged care. The Summer Foundation commissioned 2 housing demonstration projects for younger people with disability living in, or at risk of admission to, nursing homes. The first project featured 2 apartments in Abbotsford, Victoria in 2013. The success of this first project was replicated with 10 more apartments in the Hunter region of NSW in 2016. The co-located apartment model was developed to enable people with high support needs (including young people in residential aged care and younger people at risk of entering residential aged care) to be able to live in their own apartment and be co-located to enable the cost-effective provision of support.

People with disability also need ways to effectively connect with housing that may be right for them. Recognising this deficit in the accessible housing market, the Summer Foundation created the Housing Hub website and an associated Tenancy Matching Service in 2017. The Housing Hub website is an online platform that supports housing seekers and housing providers to connect and is free for both housing seekers and housing providers. Housing providers can choose to pay for premium listings and bespoke data reports. The website has more than 1,500 housing providers listing both SDA and non-SDA properties.

The Summer Foundation is not an SDA provider or a registered NDIS provider and does not own any SDA funded apartments.

The Housing Hub's Tenancy Matching Service currently works with 5 SDA providers to identify potential tenants for new SDA projects in the pipeline. Those providers are Summer Housing, Enliven Housing, Insitu Housing, Guardian Living and Specialist Disability Accommodation Pty Ltd. So far, the Tenancy Matching Service has supported more than 700 NDIS participants to receive a housing offer in New Build SDA, including 90 younger people who were living in residential aged care. The Tenancy Matching Service is a social enterprise that operates on a cost recovery basis as part of the Summer Foundation's Housing Hub initiative.

Through the work of the Tenancy Matching Service, the Housing Hub team has witnessed hundreds of SDA eligible NDIS Participants going without effective support for accessing housing due to a lack of specialist housing support coordinators. As a result, a trial of a Support Coordination Service for home and living supports has been established. This is being undertaken in partnership with Onside, a registered support coordination provider.

There are more than 15 different disability organisations providing shared support to tenants living in SDA apartments across Australia. The Summer Foundation is not an NDIS provider and does not have any influence on the selection of disability support providers in SDA-funded apartments.

The Summer Foundation's position is that we want to see a whole range of dwelling types and housing options so that NDIS participants have a real choice. We do not have a vested interest in any particular dwelling type and promote the benefits of a diverse market with flexible support arrangements, tailored to the needs of individuals.