



Specialist Disability Accommodation Supply in Australia

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Specialist Disability Accommodation – Supply in Australia

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Contents

Contents	3
Acronyms	7
Executive Summary	8
Key findings	9
Introduction	11
Aim	12
Method	12
Limitations	13
Results: Providers who participated	15
Number of providers who participated	15
Reasons for not having a pipeline	15
Results: Provider approaches and confidence	17
Provider demographics	17
Resources that providers are using	18
Resources used to decide building type and design category	18
Resources used to decide location	19
Resources used during the design phase	19
Resources used to source tenants	21
Usefulness of the SDA Finder	22
Resources used for the inspection of properties	23
Provider confidence in the SDA market	24
Current level of confidence in the SDA market	24
Themes among providers who were very or slightly unconfident	26
Themes among providers who were very or slightly confident	27
Confidence levels by organisation type	28
Change in level of confidence and explanation for the change	29
Change in confidence levels by organisation type	31
Property and tenancy management	32
SDA property management	32

SDA tenancy management	33
Separation of housing and shared support services	33
Choice over individual supports	34
Needs and preferences of people with disability	34
Level of understanding needs/preferences of people with disability	34
Resources used to understand needs and preferences	35
Questions for people with disability	35
Results: SDA supply pipeline	37
SDA supply pipeline: National overview	38
Maximum number of residents	38
Location	38
Building type	40
Design category	45
Building type and design category	48
SDA development status	49
Estimated occupancy date	50
SDA provider and developer profiles	51
Provision of on-site overnight assistance (OOA)	54
SDA supply pipeline: State and territory overview	57
New South Wales	57
Victoria	60
Queensland	63
Western Australia	66
South Australia	69
Tasmania	72
Australian Capital Territory	75
Northern Territory	78
SDA supply pipeline: Comparisons between states and national distribution	81
New South Wales	81
Victoria	83
Queensland	85
Western Australia	87

South Australia	89
Tasmania	91
Australian Capital Territory	93
Northern Territory	94
SA4 regions and NDIA data	96
NDIA notification status	96
New South Wales	98
Victoria	102
Queensland	105
Western Australia	109
South Australia	112
Tasmania	115
Australian Capital Territory	118
Northern Territory	121
Future plans for SDA dwellings beyond the current pipeline	124
Plans to build more SDA dwellings beyond current pipeline	124
Future plans by organisation type	124
Number of places beyond current pipeline	125
Reasons for being unsure or not having plans for future dwellings	126
Conclusion	127
Findings regarding pipeline supply trends	127
Findings regarding providers' approaches and confidence	128
Appendix A: SDA design categories and building types	131
Appendix B: Data screening for SDA supply pipeline	133
Appendix C: List of contributors who provided consent for publication	134
Appendix D: Questions for people with disability	136
Appendix E: About the Housing Hub	137
Resources	138
Services for housing seekers	138
Services for housing providers and vendors	139
Premium services	139
Understanding the SDA Market	139

Market data subscription	139
Market data report for a Local Government Area	139
Attracting tenants	140
Featured property listing	140
Advertising	140
Housing Hub listing service	140
Listing performance dashboard	140
Individual matching service	140
Building SDA properties for identified tenants	140
Supporting prospective tenants to secure SDA and support funding	141
Understanding the needs of your customers	141
Appendix F: Summer Foundation's role in the SDA Market	142
Summer Foundation	142

Acronyms

ABS	Australian Bureau of Statistics
CHP	Community Housing Provider
SDA	Specialist Disability Accommodation
SIL	Supported Independent Living
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
RAC	Residential Aged Care

Executive Summary

For eligible participants of the National Disability Insurance Scheme (NDIS), funding to live in specialist disability accommodation (SDA) can be life changing. Up to 30,000 participants are expected to be eligible for SDA funding based on their extreme functional impairment or very high support needs. Private capital is needed to pay for and build the SDA dwellings, which participants then ‘rent’ with additional housing payments provided through the NDIS. The investment from the private sector supports the market-based design of the NDIS and reduces the pressure on public funds.

When the SDA policy was put in place, it was expected that demand for SDA would be strong, with up to 28,000 people expected to be eligible for SDA payments to live in an SDA dwelling. However, 6 years into the implementation of SDA, more than 10,000 participants who were expected to be eligible for SDA are still not identified and receiving NDIS funding for it. Further, while there are 19,358 participants with SDA funding in their plans as of June 2022, data from the National Disability Insurance Agency (NDIA) shows that only 12,123 of these participants had payments made for SDA from their plans.

Moreover, there are nearly 1,500 participants stuck in hospitals and more than 3,000 people under 65 living in residential aged care (RAC), many of whom will meet the eligibility criteria for SDA funding. Understanding the demand profile for SDA underpins decisions by investors and providers about where and what types of SDA to build. In addition, an understanding of the current and forecast supply of SDA is crucial.

The NDIA provides data for enrolled SDA, but only limited information on SDA dwellings that are under development. Given the multi-year timelines associated with building new SDA, investors and developers need a more detailed understanding of future supply in order to inform their investment decisions.

This report provides a snapshot of the future supply of SDA in Australia. Building on previous versions of the *Specialist Disability Accommodation – Supply in Australia* reports, the Housing Hub ran a national survey of SDA providers in August 2022.¹ The aim was to collect data on the pipeline of SDA under development to help inform the wider SDA market and NDIA. Pipeline dwellings were defined as developments from the stage of land secured through to completed but not yet enrolled with the NDIA.

The report combines the survey results with the data published by the NDIA on enrolled dwellings to provide the market with critical supply information. Therefore, this survey augments NDIA data by capturing forecast supply. The findings provide actionable insights into the SDA pipeline across Australia in 2022. The report also provides insights into the market approaches of SDA providers, including their views on the SDA market and any plans they may have to develop more SDA.

¹ Survey participants were SDA providers and developers. Throughout the report, the term ‘providers’ will be used when referring to the participant sample

Key findings

In total, 79 providers contributed to the survey, with 62 providing information about their SDA supply pipeline.² Key findings of this year's pipeline data are summarised below. For comparisons to the findings from last year's survey, please refer to the footnotes.

- A total of **2,304 places** were being developed, across **1,522 SDA dwellings**³
- **More than half (58.3%)** of the reported SDA places were being developed by **private housing providers**⁴
- SDA properties were being developed in all states and territories in Australia, with almost three-quarters of the SDA places being developed in **Victoria (30.1%)**, **New South Wales (23.4%)**, and **Queensland (18.4%)**⁵
- More than **two-thirds (68.0%)** of the pipeline dwellings were being developed to accommodate a **maximum number of 1 SDA resident**⁶
- Most places were being developed for **High Physical Support (64.2%)** design, followed by **Robust (12.8%)**, **Improved Liveability (12.2%)** and **Fully Accessible (10.5%)**⁷
- **Apartments, houses, and villas/duplexes/townhouses** comprised a similar proportion (approximately **30% each**) of all pipeline places⁸
- Less than **one-tenth (8.1%)** of pipeline places were in **group homes**⁹

See Table 1 for an overview of the number of dwellings and places developed across all states and territories in Australia.

² The number of providers contributing pipeline data has slightly increased compared to the 2021 *SDA Supply Survey* (from 59 providers in 2021 to 62 providers in 2022)

³ Development activity has slightly decreased this year, with 62 fewer places and 139 fewer dwellings reported this year compared to last year

⁴ A similar percentage was identified in 2021

⁵ Compared to last year, Victoria's development activity has increased by +6.5% points in 2022, while development activity in New South Wales and Queensland has decreased by -1.3% and -10.4% points, respectively

⁶ Compared to 2021, this represents a slight decrease in 1-resident dwellings by -4.7% points

⁷ Similar proportions were identified in 2021, except for Improved Liveability, which has increased by +5.1% points in 2022

⁸ Building types were less evenly distributed in 2021, with 38.6% of places being developed in apartments, 30.1% in villas/duplexes/townhouses, and 24.0% in houses in 2021

⁹ A similar percentage was identified in 2021

Table 1 – Estimated number of SDA dwellings and places in development as at August 2022

State	Dwellings	Places
NSW	358	539
VIC	497	694
QLD	265	424
WA	231	406
SA	149	198
TAS	6	11
ACT	6	12
NT	10	20
TOTAL	1,522	2,304

In addition to providing data on their SDA pipelines, providers were asked a series of questions about their experiences and practices in the SDA market. This revealed that providers use a variety of resources to inform their build decisions and source tenants, with the most commonly engaged group being people with disability.

When asked about their confidence in the market, a third of providers reported feeling very or slightly unconfident. The 2 main reasons that contributed to this lack of confidence were (1) **difficulties with SDA funding approvals**, such as slow approval times, inconsistent NDIA decision-making, and an overall lack of approvals, and (2) **financial difficulties**, including rising building costs and interest rates.

Yet 42.9% of providers were at least somewhat confident in the market, and 33.4% of providers reported that their confidence had increased since last year. Common reasons for market confidence included **recognising the potential of the SDA market** and benefiting from **enhanced relationships with stakeholders**. Providers also reported hoping that the **new Federal Government** will make a positive impact on the SDA market, highlighting an opportunity for the Government to engage with the sector and enhance the NDIA's market stewardship.

Introduction

Specialist Disability Accommodation (SDA) is housing specially designed to increase the independence, general wellbeing, and social and economic participation of people with disability. The National Disability Insurance Agency (NDIA) expects 30,000 people with disability to be receiving SDA funding by 2025,¹⁰ and yet just 19,358 have been approved.¹¹ There are nearly 1,500 participants of the National Disability Insurance Scheme (NDIS) stuck in hospital awaiting discharge to suitable housing.¹² There are also more than 3,000 people under 65 living in residential aged care (RAC).¹³ Many of these people will fit the NDIA's eligibility criteria for SDA: having an 'extreme functional impairment and/or very high support needs.'

In the last 12 months, just \$186m was paid out to SDA providers on behalf of participants,¹⁴ despite \$271m being allocated in participants' plans.¹⁵ This is a utilisation rate of just 68%. Similarly, while there are 19,358 participants with SDA funding in their plans as of June 2022, NDIA data shows that only 12,123 of these participants had payments made for SDA from their plans.¹⁶ The NDIA has earmarked \$700m for annual SDA payments,¹⁷ indicating that budgetary constraints do not seem to be a reason behind the lower than expected number of participants looking for or already living in SDA. There are complex reasons for the discrepancy between anticipated demand for SDA, and the number of participants receiving or spending SDA funding. Many of the people who were expected to be eligible for SDA, or who have SDA funding in their plans but are not using it, are likely living in government-owned disability housing, hostels, group homes, RAC, or with family. Some participants may be unaware of new SDA as a housing option, while others may be dissuaded from requesting SDA at the required level given the complexities and issues associated with NDIA funding decisions.¹⁸

¹⁰ Commonwealth (2021). *Senate Community Affairs Legislation Committee: Answers to Questions on Notice*. Social Services Portfolio, Estimates. Question No: NDIA SQ21-000118

¹¹ NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Figure P.1. Downloaded 29 September 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

¹² Gailberger, J. (2022). Hospital patients wait to be discharged in NDIS 'bed block'. *Herald Sun*, 8 August.

<https://www.heraldsun.com.au/news/victoria/hospital-patients-wait-to-be-discharged-in-ndis-bed-block/news-story/13a4b76f83c95b25be51df072c377f52>

¹³ AIHW GEN Aged Care Data (2022). 'Younger people in residential aged care'.

<https://www.gen-agedcaredata.gov.au/Resources/Younger-people-in-residential-aged-care>

¹⁴ NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Downloaded 29 September 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

¹⁵ Ibid. Table P.2

¹⁶ NDIA (2022). *Average support line item payments: June 2022*. National Disability Insurance Agency. Downloaded 28 September 2022. <https://data.ndis.gov.au/media/3462/download?attachment>

¹⁷ NDIA (2018). *SDA investor and provider brief*. National Disability Insurance Agency.

<https://blcw.dss.gov.au/media/1099/ndia-specialist-disability-provider-update.pdf>

¹⁸ Skipsey, M., Winkler, D., Cohen, M., Mulherin, P., Rathbone, A., & Efstathiou, M. (2022). *Housing delayed and denied: NDIA decision-making on Specialist Disability Accommodation*. Public Interest Advocacy Centre and Housing Hub. <https://apo.org.au/node/317588>

Issues with ‘activating’ demand for SDA are a key concern for investors,¹⁹ but likewise, an understanding of the supply-side of the market is vital for making informed decisions about where and what types of properties to build. NDIA data indicates that as of June 2022, there were 407 SDA providers who had ever been active in the market, with only 319 being active in the last quarter of 2021/22. Also, there were more than 19,918 SDA places enrolled with the NDIA, including ‘in-kind’ arrangements with the Tasmanian Government.²⁰ More than 70% of enrolled places are in Legacy and Existing SDA.²¹

From 1 July 2021, it became mandatory for SDA providers or future SDA providers to inform the NDIA at the design stage of any proposed SDA dwellings. This supply forecast data is relatively new and somewhat restricted by the stage of development at which providers must report dwellings (i.e. the design stage). Therefore, more information about SDA in development is needed.

Aim

The Housing Hub undertook a national survey of SDA providers in August 2022 to better understand the forecast SDA supply. Building on previous iterations of the *Specialist Disability Accommodation - Supply in Australia* reports,²² this survey collected data about SDA properties in the development pipeline. As such, the survey offers insights into SDA developments, ranging from land secured, to waiting for building and/or finance approval to construction completed, or pending enrolment with the NDIA. This pipeline data is displayed alongside supply data available from the NDIA to provide a comprehensive summary of SDA supply in Australia. The survey also provides insights into the market approaches of SDA providers, including their views about the SDA market and plans to develop more SDA dwellings beyond their current pipeline.

Method

The SDA supply survey was advertised via the Housing Hub’s social media outlets and digital newsletters, as well as via emails to SDA providers. The email distribution list was taken from previous iterations of this supply survey and was updated using the NDIA’s list of registered SDA providers and Housing Hub housing providers.

The survey was sent to SDA providers in July 2022 and closed after 4 weeks in mid-August 2022. Survey participants were SDA providers and developers. Throughout the report, the term ‘providers’ will be used when referring to the participant sample.

¹⁹ Madhavan, D., Mulherin, P., & Winkler, D. (2021). *Specialist Disability Accommodation (SDA) investor think tank: Findings and recommendations*. Summer Foundation. <https://apo.org.au/node/313679>

²⁰ NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Downloaded 11 August 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

²¹ Ibid.

²² Published in March 2019, March 2020, January 2021. Latest edition: Aimers, N., Wellecke, C., Winkler, D., Rathbone, A., & Mulherin, P. (2021). *Specialist Disability Accommodation – Supply in Australia: November 2021*. Housing Hub and Summer Foundation. <https://apo.org.au/node/314855>

The survey consisted of 2 parts: (1) an online survey on QuestionPro collecting information about providers' market approaches and confidence, and (2) an Excel spreadsheet collecting information about providers' pipeline of SDA dwellings. Survey questions were substantially similar to those asked in previous surveys; however, the Excel pipeline spreadsheet differed slightly from previous years. More specifically, for the first time, providers who had participated in the previous iteration of the supply survey were sent a personalised Excel spreadsheet showing the pipeline information they had reported last year. Providers were asked to add any new pipeline dwellings as well as update the development status of the dwellings they had previously reported. This gave providers the chance to indicate whether their previously reported dwellings had progressed to enrollment with the NDIA. Although not included in the current report, it is hoped that this information will enable the calculation of a conversion rate (i.e. the percentage of dwellings that progress from development through to enrolment) in future reports. Respondents who had not participated in the previous survey received a blank Excel spreadsheet to report their pipeline dwellings.

Depending on the size of a provider's pipeline, it was estimated that the survey would take 30 minutes to complete. All providers were advised that their responses would be treated with strict commercial-in-confidence and that all identifying information would be removed in the published report.

Limitations

There are some limitations in the data presented which should be taken into account when reading this report. Given that this survey is voluntary, not all SDA providers who are currently developing SDA properties have participated. Therefore, this survey does not capture all SDA dwellings that are currently being developed in Australia.

It is difficult to estimate the share of SDA providers captured in the survey. Data from the NDIA indicates that 319 SDA providers were active in the last quarter of 2021/22.²³ The current survey included pipeline data from 62 providers, which represents approximately 19.4% of the 319 active providers. However, active providers only include those with enrolled dwellings who are operating existing SDA, and it is likely that many of these are NDIS participants who have registered themselves as SDA providers and their property as SDA. Therefore, not all active providers are currently developing new SDA. Conversely, some organisations that are developing SDA may not yet be registered with the NDIA. Therefore, the number of active providers is not an indicator of the number of providers who may be developing new SDA.

Similar to previous surveys, our approach to ensuring a high participation rate was to approach all SDA providers that have an account with the Housing Hub. Previous participants of the survey were also approached with a personalised pipeline spreadsheet

²³ NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Table P. 3. Downloaded 29 September 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

to encourage participation. Further, the survey was advertised via several methods, including the channels of an industry peak body (PowerHousing Australia). We believe this has resulted in data that is representative of a large portion of the SDA market. Moreover, the number of participants has increased slightly from past iterations of the supply survey (from 55 participants in 2019 to 79 participants in the current survey).

In addition to not fully capturing all SDA developments in Australia, it is also important to note that the pipeline dwellings that are captured in this survey may not eventuate in SDA supply. The reported pipelines are taken at face value, and we do not require evidence that a contract is in place. We have seen in previous surveys numerous examples of SDA projects that were in pipelines that did not eventuate, so we cannot assume that all of the places reported will make it to enrolment with the NDIA. Moreover, some of the reported pipeline dwellings may undergo building and design changes, or may not be exclusively developed for 1 particular design category (i.e. some providers may accept Fully Accessible funded tenants in a High Physical Support dwelling). Therefore, while the data presented in this report is an indication of future SDA supply, it is important to acknowledge that changes to pipeline dwellings can occur for various reasons along the development life cycle.



Results: Providers who participated

Number of providers who participated

In total, 79 providers were involved in this year's survey. Of these 79 providers, 22 providers reported that they did not have a current pipeline and, therefore, did not need to complete the survey beyond reporting future plans to develop SDA. Of the remaining 57 providers, 2 only partially completed the survey (1 provider completed half of the QuestionPro survey, and 1 provider only uploaded their pipeline data but did not respond to any questions in the QuestionPro survey). This resulted in a total of 55 to 56 providers completing the questions in the QuestionPro survey.

In terms of the pipeline data, 1 of the 57 providers who reported having a current pipeline did not upload details about their pipeline. Therefore, the pipeline data in this year's survey was initially based on the responses of 56 providers. However, pipeline data from the previous supply survey was also included. More specifically, pipeline dwellings from providers who participated in the previous SDA supply survey but not this year's survey were included if the dwellings were still considered to be under development. This resulted in adding the pipeline data of an additional 6 providers, leading to a total of 62 providers contributing data to the pipeline section of this survey. Refer to Appendix B for a more detailed description of the data screening process for the pipeline data.

In summary, the results of this report are based on the responses of:

- 55 to 56 providers who responded to the online survey questions - these responses are summarised in the 'Provider approaches and confidence' section
- 62 providers who provided pipeline data²⁴ - this data is summarised in the 'SDA supply pipeline' section

Appendix C shows a list of all providers who agreed to be named as contributors to the SDA supply report. Note that this list also includes providers whose pipeline data was added from the previous supply survey.

Reasons for not having a pipeline

As indicated above, 22 out of 79 providers (27.8%) reported that they did not have a current pipeline. This percentage is slightly higher than what was reported in last year's survey, which comprised 17.3% of providers (13 out of 75 providers) without a pipeline.

In this year's survey, providers were asked to indicate why they are not developing SDA dwellings. Half of the providers ($n = 11$) reported that developing SDA properties does not align with their **organisation's strategic direction**. For example, some providers reported

²⁴ These were 56 providers from the current survey, plus 6 providers from the previous survey who did not complete the current survey

that developing new SDA properties is not part of their business model because they are focusing on their existing properties, while others indicated that their organisation was unsure of its future strategic direction. Developing new SDA properties appeared to be a potential option for some organisations in the future; however, these organisations had not yet committed to a pipeline at the time of this survey.

"Unsure of what strategic direction we want to take with our current land/building assets and also being SDA/SIL provider." - Respondent 71

"[We] are currently in discussions with investors to explore future growth and development options." - Respondent 4

For 6 providers, **difficulties developing SDA in the current market climate** was 1 of the reasons they did not have a current pipeline. These providers indicated that they were discouraged from building more SDA properties due to challenges in the SDA market, including concerns around vacancy risks as well as difficulties finding tenants, understanding the needs of potential tenants, and matching supply and demand.

"Difficulty in determining the need and access for people living with a disability to want to live in the areas that we have identified." - Respondent 59

"There are not enough clients to fill current vacancies in existing SDA properties at the HPS level." - Respondent 53

Lastly, 5 providers raised **financial difficulties** as a reason. Providers were lacking the funding for a pipeline, and the rising development costs were reported to undermine the financial feasibility of building SDA properties.

"Financial costs of building house at the moment is not financially viable." - Respondent 6

The next sections provide an overview of the experiences of providers who reported having a pipeline.

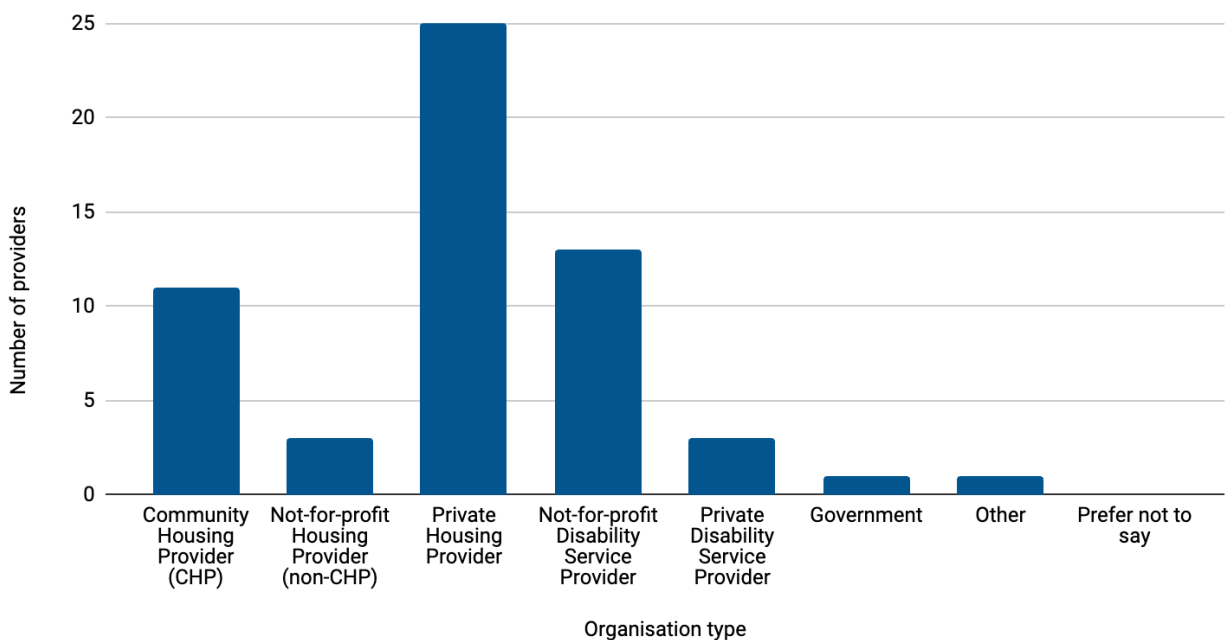
Results: Provider approaches and confidence

Provider demographics

Within Australia, there are several different types of organisations or individuals providing SDA. Of the 57 providers who reported having a current SDA pipeline, almost half (43.9%) were private housing providers. This was followed by 22.8% not-for-profit disability service providers and 19.3% community housing providers (CHPs). One provider was both a not-for-profit disability service provider and a CHP, which was classified as 'Other'. Refer to Figure 1 for an overview of all provider types.

The continued prevalence of disability service providers as SDA providers and developers is notable, especially considering that under the NDIS, housing and support are encouraged to be provided by separate organisations.

Figure 1 - Types of providers developing SDA in Australia ($n = 57$)



Providers were also asked when they first started building SDA dwellings. This information was available for a total of 46 providers. Among these, there was a wide range of experience, with some having just started building SDA at the time of this survey, while others had been building SDA since its inception (approximately 6 years ago).²⁵ On average, the 46 providers had been building SDA dwellings for 3 years ($SD = 1.8$ years).

²⁵ The maximum amount of time a provider could have been developing SDA was 6 years and 4 months, based on the survey closing date being August 2022

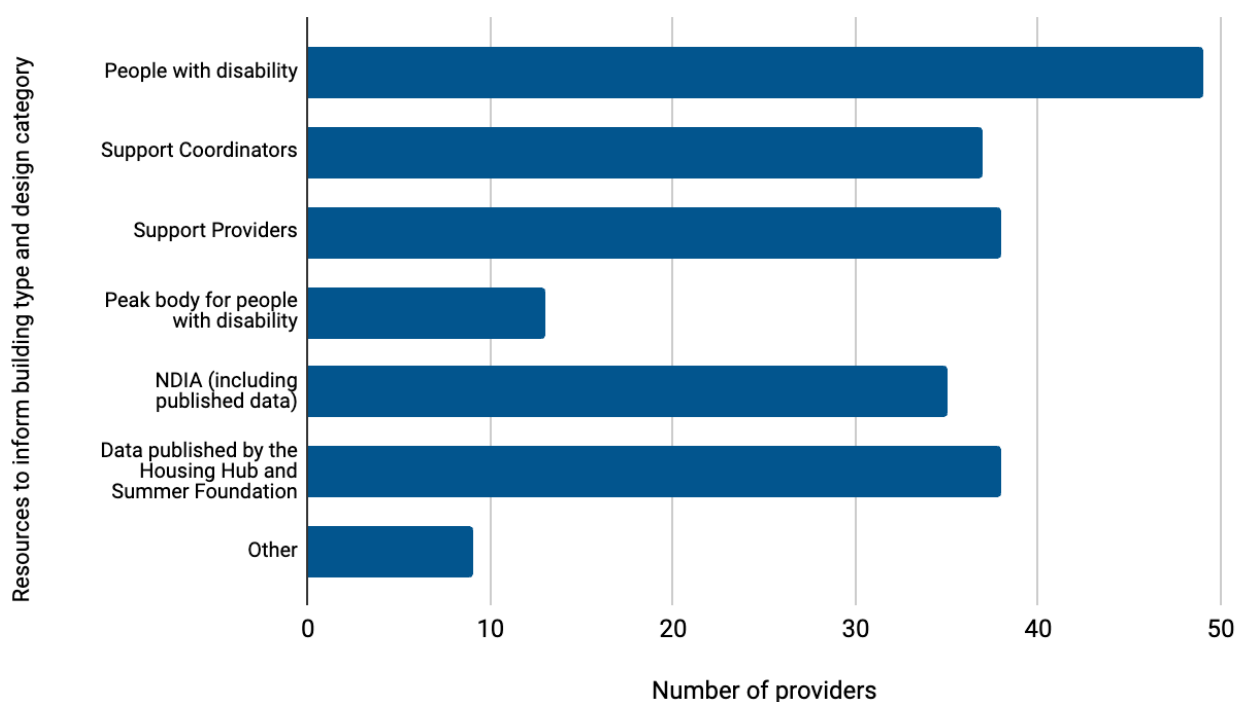
Resources that providers are using

Resources used to decide building type and design category

Providers were asked what resources they are using to decide what building type and design category to build. As can be seen in Figure 2, almost all providers (87.5%) engaged with people with disability. Approximately two-thirds of providers also reported consulting with data published by the Summer Foundation and Housing Hub (67.9%) as well as with support providers (67.9%), support coordinators (66.1%), and the NDIA (including published data; 62.5%). Peak bodies for people with disability were consulted by 23.2% of providers, making this the least commonly used resource.

There were 9 providers (16.1%) who consulted with categories other than those above – these mainly comprised other building professionals in the SDA market (i.e. other SDA providers, SDA building developers, and SDA building certifiers) as well as allied health professionals (i.e. occupational therapists). On average, providers consulted with 4 resources ($SD = 1.6$, range = 1-7), suggesting that they tend to gather information from multiple sources when making build decisions.

Figure 2 - Consultation of groups by SDA providers ($n = 56$) to inform building type and design category



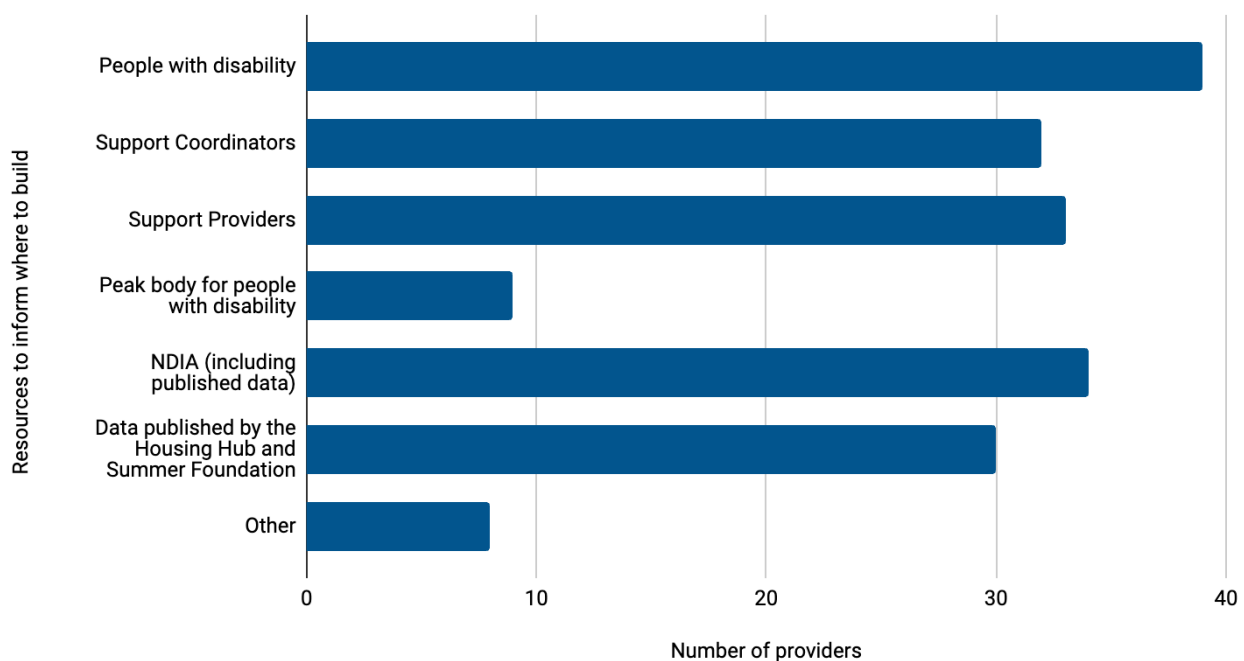
Note: Providers could select multiple responses. Examples of data published by the Housing Hub and Summer Foundation were the SDA Supply Survey, SDA Seekers Snapshot, and SDA Listings Snapshot

Resources used to decide location

A similar pattern was identified for resources used to decide where to build SDA properties, with the most commonly consulted group being people with disability (consulted by 69.6% of providers). This was again followed by providers consulting with the NDIA (including published data; 60.7%), support providers (58.9%), support coordinators (57.1%), and data published by the Housing Hub and Summer Foundation (53.6%).

Some providers (14.3%) also indicated that ‘other’ factors determine where they build SDA properties, which predominantly included the availability and acquisition of land that suits the development of SDA. On average, providers consulted with 3 resources to inform the location of the build ($SD = 1.6$, range = 1-6). Refer to Figure 3 for an overview of all resources used.

Figure 3 - Consultation of groups by SDA providers ($n = 56$) to inform the location of the build



Note: Providers could select multiple responses. Examples of data published by the Housing Hub and Summer Foundation were the SDA Supply Survey, SDA Seekers Snapshot, and SDA Listings Snapshot.

Resources used during the design phase

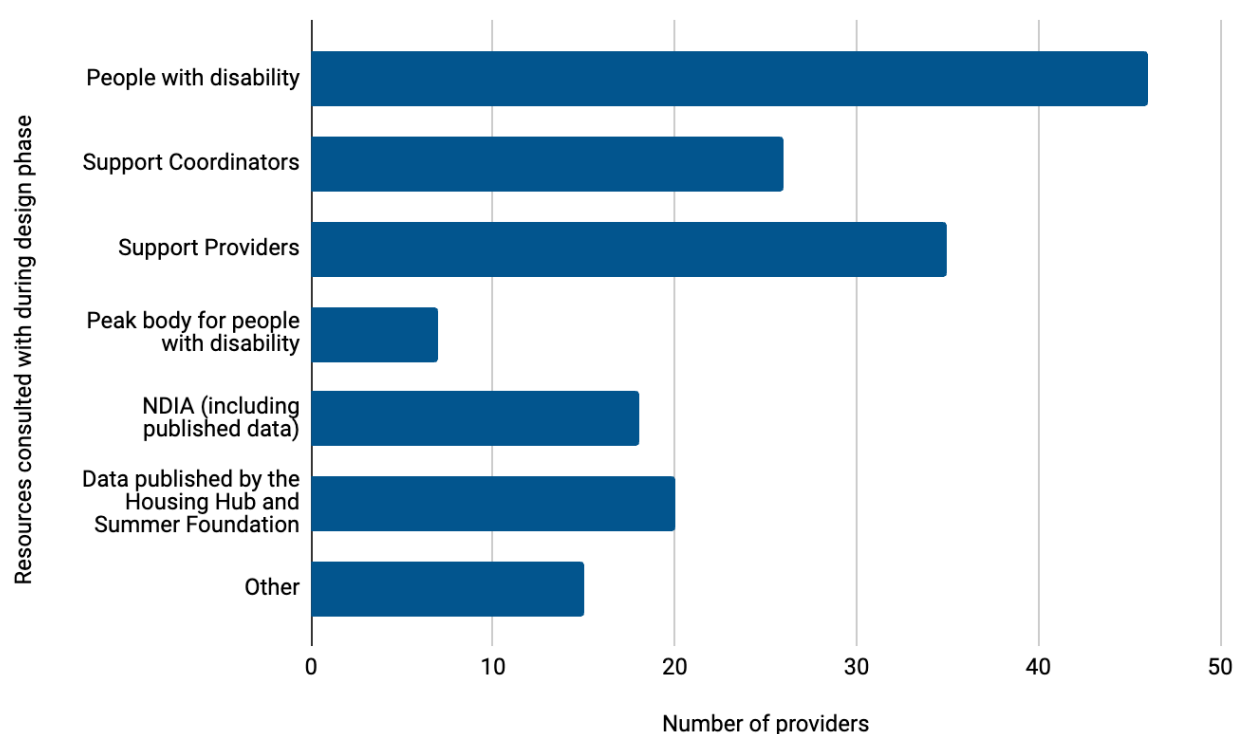
Providers were also asked to indicate what groups they are consulting with during the design phase of SDA dwellings (see Figure 4). On average, providers reported engaging with 3 resources ($SD = 1.4$, range = 1-6). Similar to the resources used to decide where and what to build, the majority (82.1%) of providers engaged with people with disability, making

this the most commonly consulted group for a variety of build decisions. This was followed by support providers and support coordinators, which were consulted by 62.5% and 46.4% of providers, respectively.

Only one-third of providers reported consulting with the NDIA (including published data; 32.1%) and data released by the Housing Hub and Summer Foundation (35.7%). These percentages are substantially lower than those reported above for the consultation of groups to inform decisions on the building type, design category, and location. Therefore, the NDIA, and Housing Hub and Summer Foundation data appear to be less commonly used during the design phase than for other build decisions.

Other groups that providers (26.8%) engaged with were the families of people with disability as well as design and building professionals (i.e. access consultants, architects, and designers).

Figure 4 - Consultation of groups by SDA providers ($n = 56$) during the design phase



Note: Providers could select multiple responses. Examples of data published by the Housing Hub and Summer Foundation were the SDA Supply Survey, SDA Seekers Snapshot, and SDA Listings Snapshot

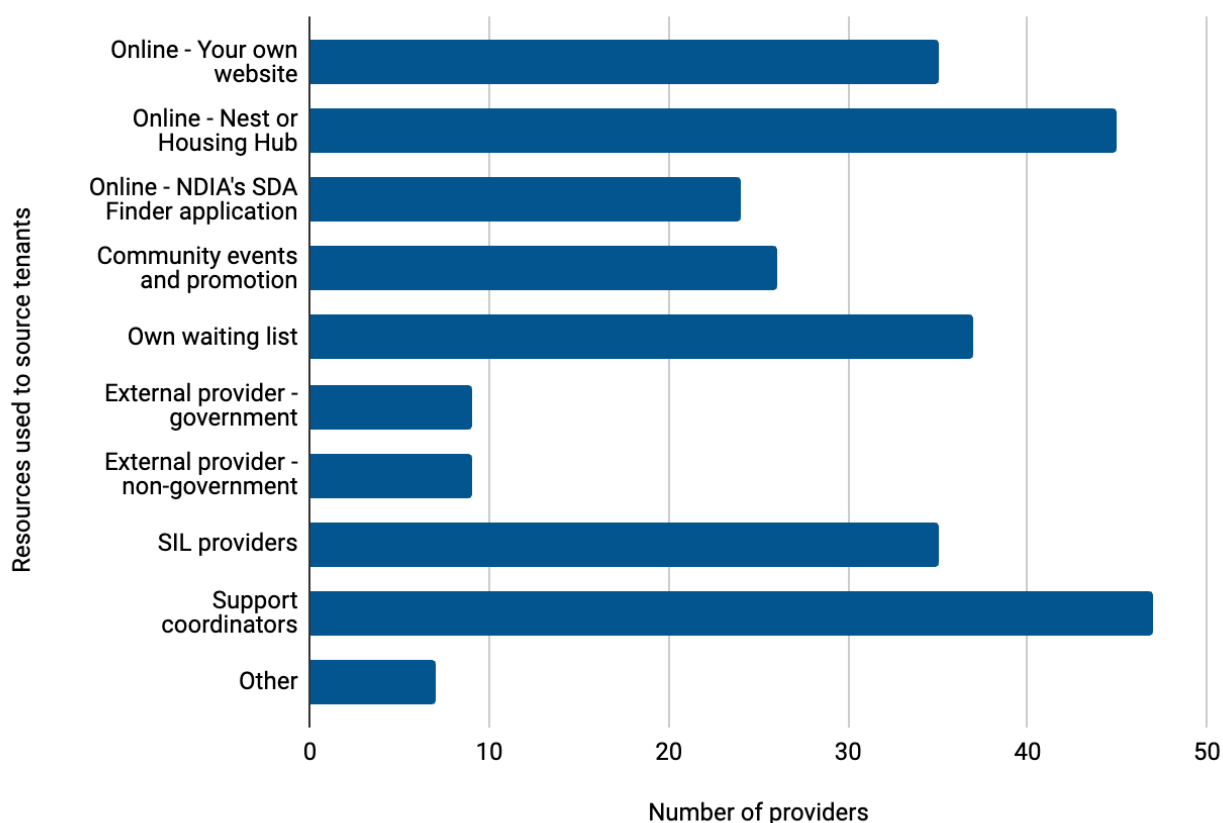
Resources used to source tenants

The survey also explored what resources providers are using to source tenants for their SDA properties. Again, more than 1 resource was typically used, with providers reporting an average of 5 resources ($SD = 2.3$, range = 1-10) to fill their SDA vacancies.

Figure 5 demonstrates that the majority of providers reported sourcing tenants via support coordinators (85.5%) and online real estate websites such as Nest or the Housing Hub (81.8%). Other resources used to source tenants included the provider's own waiting list (67.3%), SIL providers (63.6%), provider's own websites (63.6%), community events and promotions (47.3%), and the NDIA's online SDA Finder application (43.6%). External providers such as government agencies (16.4%) and non-government agencies (16.4%) were the least commonly used resource. Some providers (12.7%) also listed 'other' resources used to source tenants, which primarily included allied health professionals and word of mouth.



Figure 5 - Resources used by SDA providers ($n = 55$) to source tenants



Note: Providers could select multiple responses.

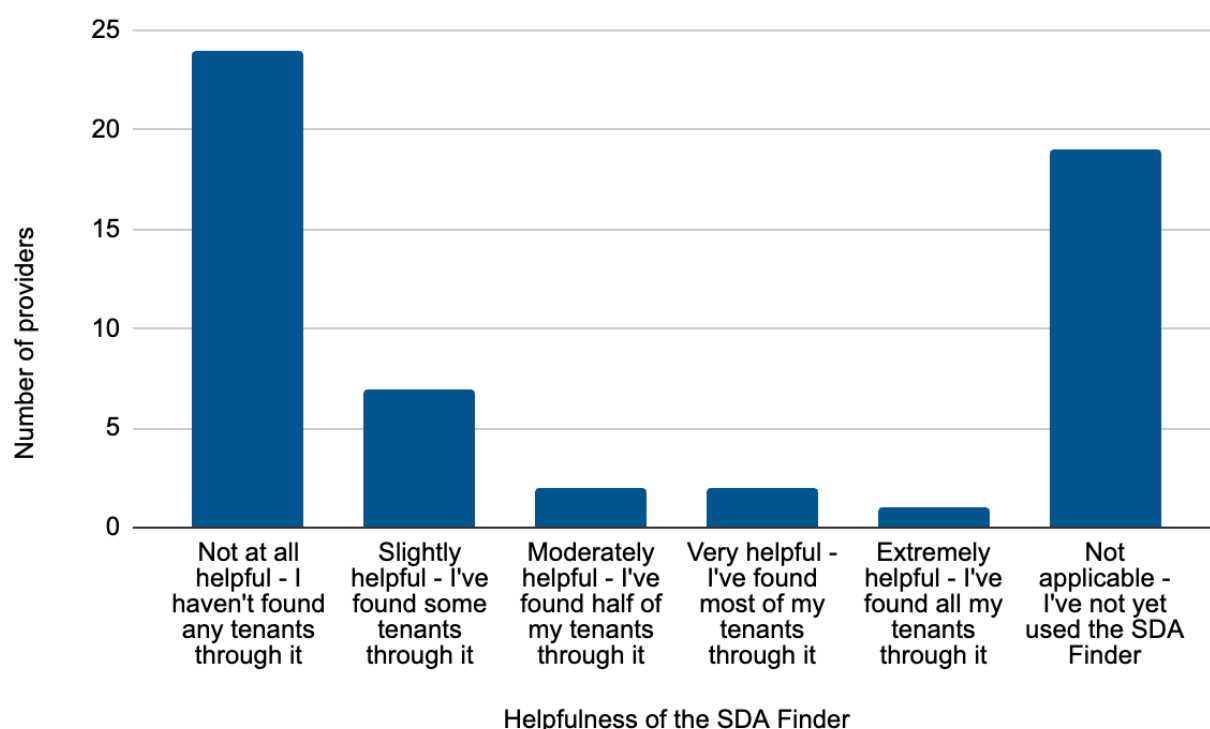
Usefulness of the SDA Finder

The NDIA has developed an online tool, called the SDA Finder, for connecting seekers of SDA with available properties.²⁶ Providers were asked how helpful the SDA Finder was for sourcing tenants.

In total, 19 providers indicated they had never used the SDA Finder so did not rate the usefulness of this tool. Among the remaining 36 providers who have previously used the SDA Finder, the majority rated the tool as 'not at all helpful' (66.7%). Some providers found the tool 'slightly helpful' (19.4%), and only a few providers found the tool 'moderately helpful' (5.6%), 'very helpful' (5.6%), or 'extremely helpful' (2.8%). See Figure 6.

²⁶ Available at:
<https://www.ndis.gov.au/participants/home-and-living/specialist-disability-accommodation-explained/sda-finder>

Figure 6 - Helpfulness of the SDA Finder ($n = 55$) to source tenants



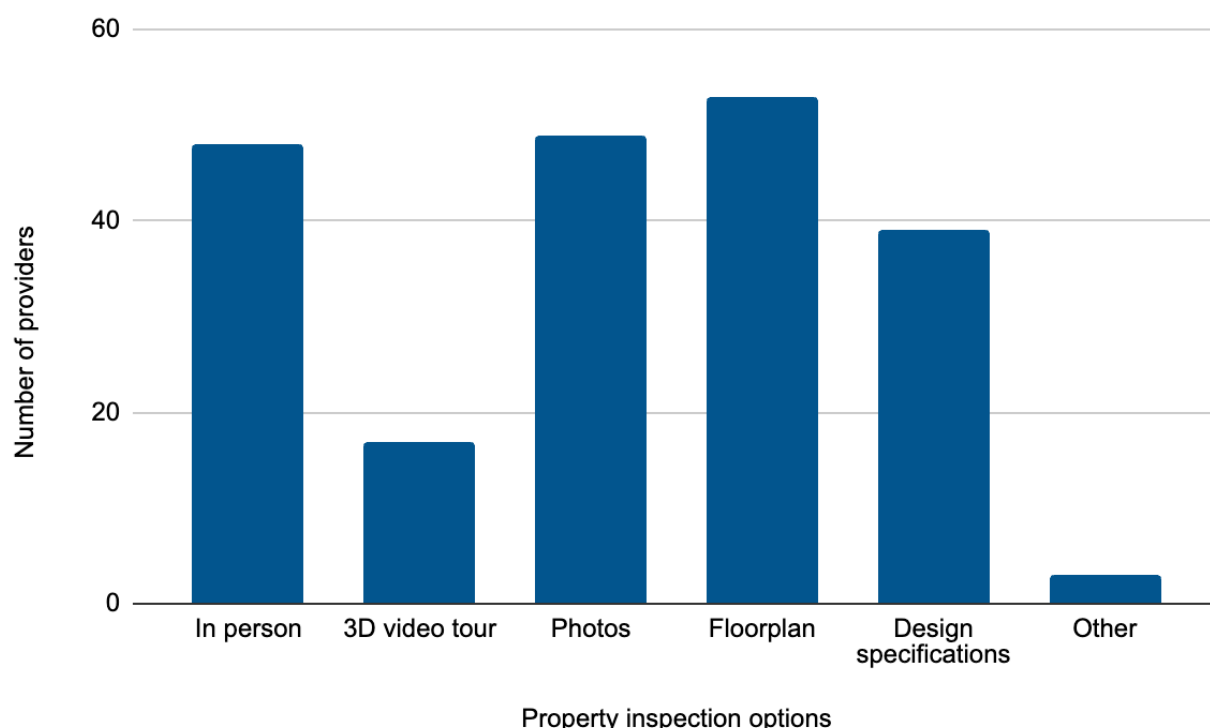
Resources used for the inspection of properties

Providers were asked what methods were available for people to inspect their SDA dwellings, with providers using, on average, 4 different methods ($SD = 1.1$, range = 1-6).

As Figure 7 indicates, the majority of providers offered floor plans (96.4%), photos (89.1%), in-person inspections (87.3%), and design specifications (70.9%). The least commonly used method was 3D video tours (30.9%). This is interesting, given that recent evidence from a focus group with people with disability has indicated that video tours are an important part of advertising properties because they enable potential tenants to gain a better understanding of the size, layout and appearance of the property.²⁷ The low rate of providers using videos for property inspections may indicate that more awareness of the usefulness of this tool might be needed among providers. Some providers (5.5%) also stated that they utilise 'other' methods than those listed above, which mainly included video calls.

²⁷ Wellecke, C., de Costa, M., Robertson, J., Rathbone, A., Rothman, R., Bradley, L. & Fall, G. (2022). *Criteria for high-quality images on Housing Hub listings*. Housing Hub and Summer Foundation. https://assets.ctfassets.net/blhxs4s3wp2f/5AWLUOLsJrI71xkwB7myZ6/2b570ce73bfea69e39e2baa2b2de8462/List_of_criteria_24_Aug.pdf

Figure 7 - Methods used by SDA providers ($n = 55$) for inspection of their dwellings



Note: Providers could select multiple responses

Provider confidence in the SDA market

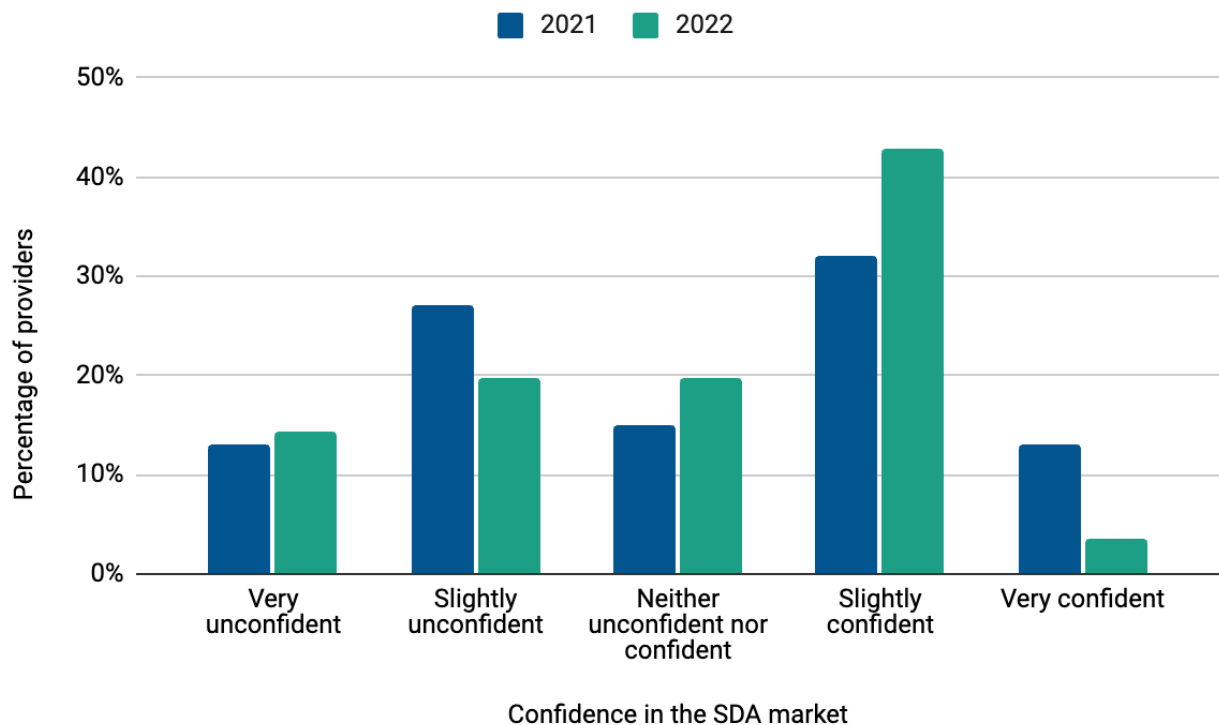
Current level of confidence in the SDA market

Confidence levels in the SDA market are likely influenced by several factors, such as the ability to find tenants, the financial viability of operating in the market, and the NDIA's stewardship of the market. Currently, there is no tool available that assesses the different facets of providers' confidence levels in the SDA market. In the absence of such a tool, providers were asked to broadly rate their current confidence levels as well as provide an explanation of their current confidence levels. It was hoped that the responses will help shed light on the different factors influencing SDA providers' market confidence.

Figure 8 shows providers' current confidence levels, alongside the confidence levels that were reported in last year's survey. As can be seen, in this year's survey, approximately half of the providers (46.5%) stated they felt confident in the SDA market, with most (42.9%) being 'slightly' confident. A third of providers (33.9%) felt slightly or very unconfident, while 19.6% were neither unconfident nor confident.

These confidence levels were largely similar to what was reported last year; however, slight differences are notable. For example, the proportion of providers feeling unconfident in the SDA market was slightly smaller this year compared to last year (33.9% in 2022 versus 40.3% in 2021), mainly due to a reduction of providers feeling ‘slightly unconfident’. The total proportion of providers feeling slightly or very confident was similar between 2021 and 2022 (46.5% in 2022 versus 45.2% in 2021); however, a larger proportion of providers were ‘slightly confident’ and a smaller proportion were ‘very confident’ compared to last year. This suggests that while fewer providers appear to be lacking confidence in the SDA market this year, confidence levels do not appear to be substantially higher this year than last year.²⁸

Figure 8 - Providers’ current confidence in the SDA market in 2021 (*n* = 62) and 2022 (*n* = 56)



Explanations of the providers’ current confidence levels were separated into 2 groups: (1) explanations of providers who felt slightly or very unconfident, and (2) explanations of providers who felt slightly or very confident. The explanations from these 2 groups were subsequently analysed thematically. Responses from providers who felt neither unconfident nor confident were not analysed due to the small number of providers in this group.

²⁸ These comparisons need to be interpreted with caution, because different providers participated in the surveys in 2021 and 2022

However, their explanations addressed similar difficulties and complexities as those identified by providers who reported feeling unconfident.

Themes among providers who were very or slightly unconfident

Two key themes were identified across the providers who reported feeling either slightly or very unconfident, with the first theme being **difficulties with SDA funding approvals** ($n = 14$). This included concerns about navigating NDIA processes, slow approval times, and inconsistent decision-making in terms of funding approvals, such as funding levels being inconsistent with the needs and preferences of people with disability. These issues appeared particularly evident for funding approvals for single-resident dwellings. Providers also noted a general lack of NDIS participants who have SDA funding approved in their plans, despite there being an underlying demand for SDA. This has resulted in providers fearing vacancy risks and being discouraged from expanding their property portfolio.

“Regardless of underlying demand, there is a lot of uncertainty and difficulty in getting tenancies in place with NDIS funding. We have essentially given up any thoughts of scaling up SDA significantly[...].” - Respondent 45, Community Housing Provider (CHP), very unconfident

“The usual - the NDIA has an unrealistic understanding of what people with disability actually want and what is feasible & safe to both people with a disability & staff providing supports. Timeframe for assessment outcomes, we still have 'existing' residents waiting for an SDA allocation.” - Respondent 33, Not-for-profit Disability Service Provider, very unconfident

“No guarantee on receiving funding when build is completed. NDIS is not providing SIL funding and not providing SDA funding.” - Respondent 54, Not-for-profit Disability Service Provider, very unconfident

“Slow process of getting funding approvals for single occupancy apartments.” - Respondent 30, Private Housing Provider, slightly unconfident

Secondly, providers cited **financial difficulties** ($n = 5$) as a reason for feeling unconfident in the SDA market. These included an increase in construction costs, land prices, and interest rates, with providers noting that the price guide is not aligned with the current market conditions. This difficulty has already been identified in last year's SDA supply survey. As mentioned previously, the upcoming SDA Price Review will be a key opportunity for the NDIA to work with the sector to ensure that SDA pricing keeps pace with the cost of land, construction, tenancy and ongoing costs.

“We have enough issues with massive price hikes, interest rate rises, without having those in charge of the NDIA making it harder for participants to qualify for SDA.” - Respondent 3, Private Housing Provider, slightly unconfident

“The problem is how hard it is to deliver - from the increasing cost of land and construction, the SDA price guide not matching real market conditions and finally even when those finances stack up we face the final challenge on whether the participant is approved for what they require. Without more investment into SDA to make funding match the real market conditions delivering SDA homes is becoming near impossible.” - Respondent 11, Community Housing Provider (CHP), slightly unconfident

Themes among providers who were very or slightly confident

Four key themes emerged from providers who reported feeling slightly or very confident in the SDA market. Across these themes, it became evident that providers often acknowledged the complexities and problems associated with the SDA market, with many of the below quotes still pointing to a lack of market confidence; despite this, it appears that the providers chose to remain optimistic and confident.

The most cited explanation for feeling confident in the SDA market was **recognising the potential of the SDA market** ($n = 14$). Providers acknowledged that while the SDA market remains in need of improvements, it is constantly evolving. Providers noted strong underlying demand for SDA, as there are many people with disability who require SDA properties as a housing solution. Providers also reported they had noticed positive outcomes from Administrative Appeals Tribunal (AAT) appeals and were hopeful that the NDIA will reassess the SDA funding needs of tenants in Legacy SDA dwellings. A better understanding of the demand and housing needs of people with disability also contributed to providers feeling more confident about the prospects of building SDA.

"NDIA has committed to supporting our organisation (and the broader industry) to ensure residents in legacy stock are re-assessed and reviewed to ensure SDA funding in participant's plans reflects their future housing needs and aspirations. This gives our organisation confidence to develop new SDA properties in the knowledge that appropriate funding will be forthcoming in participant's plans." - Respondent 5, Community Housing Provider (CHP), slightly confident

“There are many people out there that do (or could) qualify for SDA that require improved housing options. The SDA market in general is always evolving and [it is] difficult to be very confident in this space.” - Respondent 44, Private Housing Provider, slightly confident

“There is still a significant lack of SDA housing and a high demand for people living with a disability living in poor quality homes. There is still a significant gap in the market that needs to be filled.” - Respondent 39, Community Housing Provider (CHP), slightly confident

“There is a demand for SDA properties [...], however, the approval process is still too long.” - Respondent 62, Community Housing Provider (CHP), very confident

Secondly, providers noted both **difficulties and improvements in SDA funding** ($n = 5$). Similar to the themes among providers who felt unconfident, lack of funding consistency,

and delays in funding approvals were highlighted. Despite these concerns, providers still felt confident in the market, and some noted positive changes in funding for independent living.

“Recent indicators that single-occupancy dwellings may be considered as appropriate outcomes for participants more often than previously experienced (e.g. OGs updated to include basic information about single-occupancy clustered SDA models).” - Respondent 19, Private Housing Provider, slightly confident

“Development price escalation, SDA approval inconsistency, lengthy appeals process.” - Respondent 15, Private Housing Provider, slightly confident

The third theme impacting providers' confidence levels was **enhanced relationships with stakeholders** ($n = 4$). Providers stated they have been benefiting from connections and partnerships with other stakeholders in the building industry, support providers, and people with disability (including via co-design). This networking reportedly increased providers' experience in the sector and confidence to meet tenants' needs, and has had positive impacts on the progression of their builds.

“We now have a lot more experience in this space, gained from relationships with support providers.” - Respondent 1, Private Disability Service Provider, slightly confident

“[...] with the connections we have made in the building industry, we are seeing some stalled builds coming to fruition.” - Respondent 42, Private Housing Provider, slightly confident

Lastly, some providers reported feeling confident in the SDA market due to having **hopes in the new Federal Government** ($n = 2$). The recent Australian 2022 federal election resulted in the Australian Labor Party being voted into government, which according to 1 provider has already resulted in positive changes.

“The change of government and senior management at the Agency has already resulted in better outcomes and decisions regarding to SDA decisions.” - Respondent 41, Private Housing Provider, slightly confident

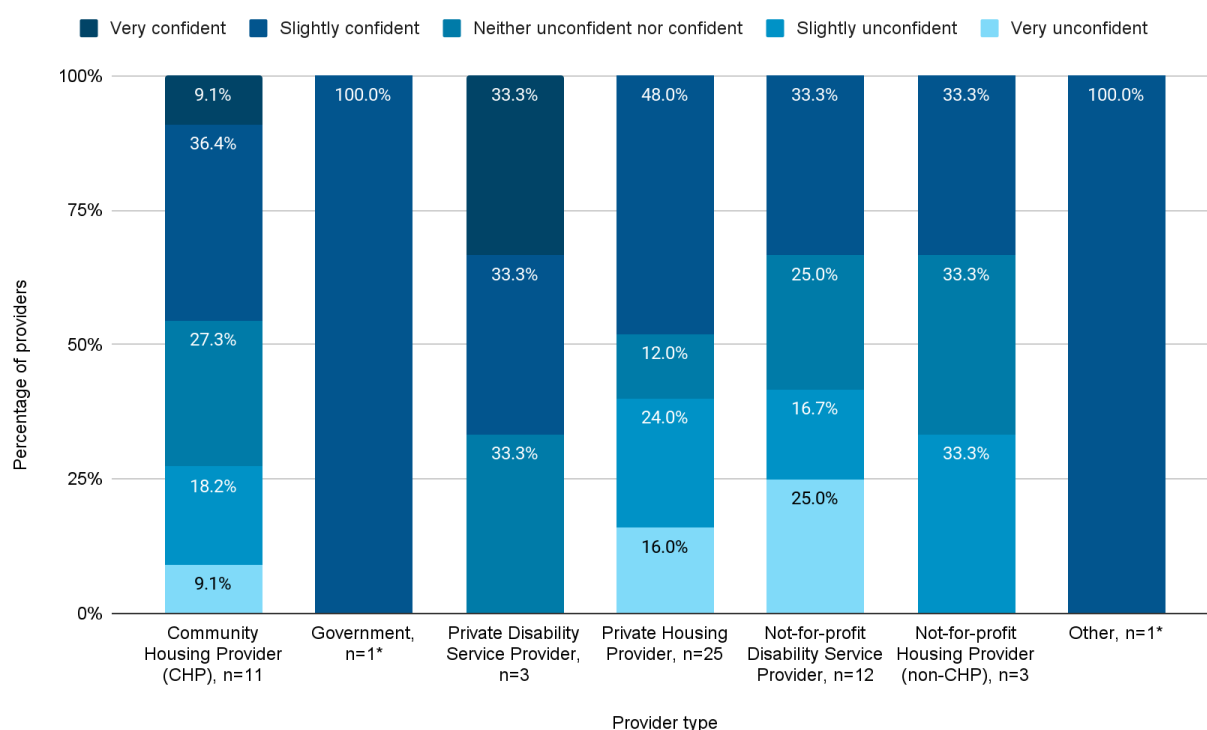
Confidence levels by organisation type

This report also investigated whether confidence levels vary across the different organisation types operating in the SDA market. A breakdown of confidence levels by organisation type is shown in Figure 9.

Encouragingly, all organisation types expressed at least slight levels of confidence in the SDA market. One of the most confident organisation types was private disability service providers, with 66.7% indicating they felt either slightly or very confident in the market. Moreover, private housing providers were 1 of the only organisation types expressing very high confidence in the market.

In contrast, a lack of market confidence was most commonly reported by providers in not-for-profit organisations, with 41.7% of not-for-profit disability service providers and 33.3% of not-for-profit housing providers indicating they were slightly or very unconfident. Lack of confidence in the market was also common among private housing providers; however, unlike not-for-profit organisations, private housing providers more commonly felt confident (48.0%) than unconfident (40.0%) in the market. Taken together with the high confidence levels among private disability service providers, these findings suggest that confidence in the SDA market may be slightly more common among providers in the private sector than the not-for-profit sector.²⁹

Figure 9 - Providers' current confidence in the SDA market 2022 (n = 56) by provider type



* Note: 'Government' and 'Other' only consisted of 1 respondent each; therefore, this proportion needs to be interpreted with caution

Change in level of confidence and explanation for the change

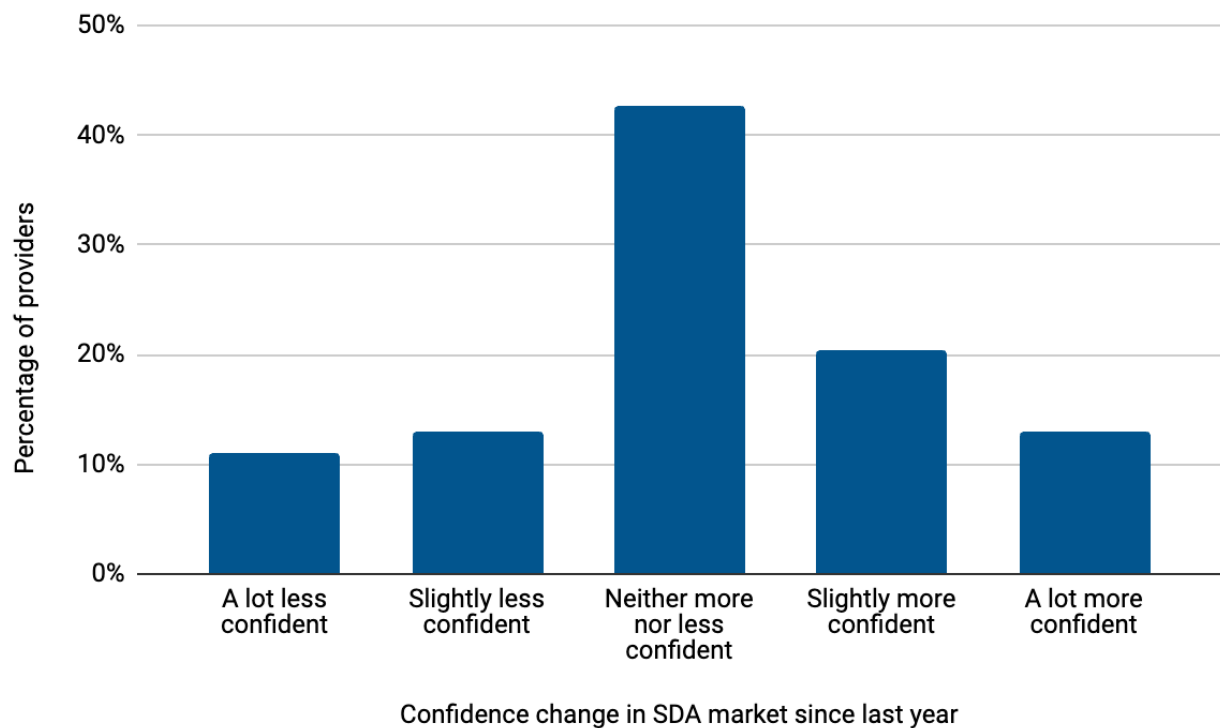
Compared to 12 months ago, most of the providers stated they were 'neither more nor less confident' (42.6%). This was followed by a third of providers (33.4%) feeling 'slightly more' or

²⁹ Findings need to be interpreted with caution, as some organisation types comprised only a small sample of respondents

‘a lot more’ confident in the SDA market. A slightly smaller proportion of providers (24.1%) reported a decline in their confidence levels. Refer to Figure 10 for a visualisation of the change in confidence levels. Please note that 2 providers did not provide SDA dwellings last year and, therefore, were not able to report changes in their confidence.

Overall, the changes in confidence levels that were reported by providers appear to align with the comparison of confidence levels between 2021 and 2022 shown in Figure 8 above. As mentioned above, providers’ confidence levels were largely similar between 2021 and 2022, with only slight changes in proportions. This aligns with the large proportion of providers stating that their confidence levels have remained unchanged since last year. Interestingly, the increase in confidence levels that 33.4% of providers have reportedly experienced (see Figure 10) does not seem to have resulted in substantially high levels of market confidence, given that only a small proportion of providers reported feeling ‘very confident’ this year (see Figure 8).

Figure 10 - Change in providers’ confidence levels in the SDA market over the past 12 months ($n = 54$)



Explanations as to why providers experienced a change in confidence levels were again thematically analysed. The responses identified were of similar nature to the above themes surrounding current levels of confidence and unconfidence. The 2 themes that related to feeling less confident were **difficulties with SDA funding approvals** ($n = 6$) and **financial**

difficulties ($n = 2$). The 2 key themes related to increased confidence were **hopes in the new Federal Government** ($n = 9$), and **positive outcomes from networking** ($n = 2$).

Given the similarity to the themes above, the themes are not described again in this section. However, it is important to acknowledge that several providers listed hopes in the new Federal Government as an important factor that has improved their confidence level in the SDA market since last year. Providers reported hoping that the new government will lead to a return to the Scheme's initial values and principles, with some reportedly already noting positive changes. This suggests that providers feel there is an opportunity for the newly elected Australian Labor Party to make a positive change to the SDA and disability sector.

“The new government seems to care most for people with disability and there appears to be more cooperation to assist people to find a home.” - Respondent 35, Private Housing Provider, a lot more confident

“The change in government (and Minister and CEO) appears to have contributed to a generally more positive and action-focused agenda, in which we are seeing a return to the underlying principles of the scheme.” - Respondent 5, Community Housing Provider (CHP), slightly more confident

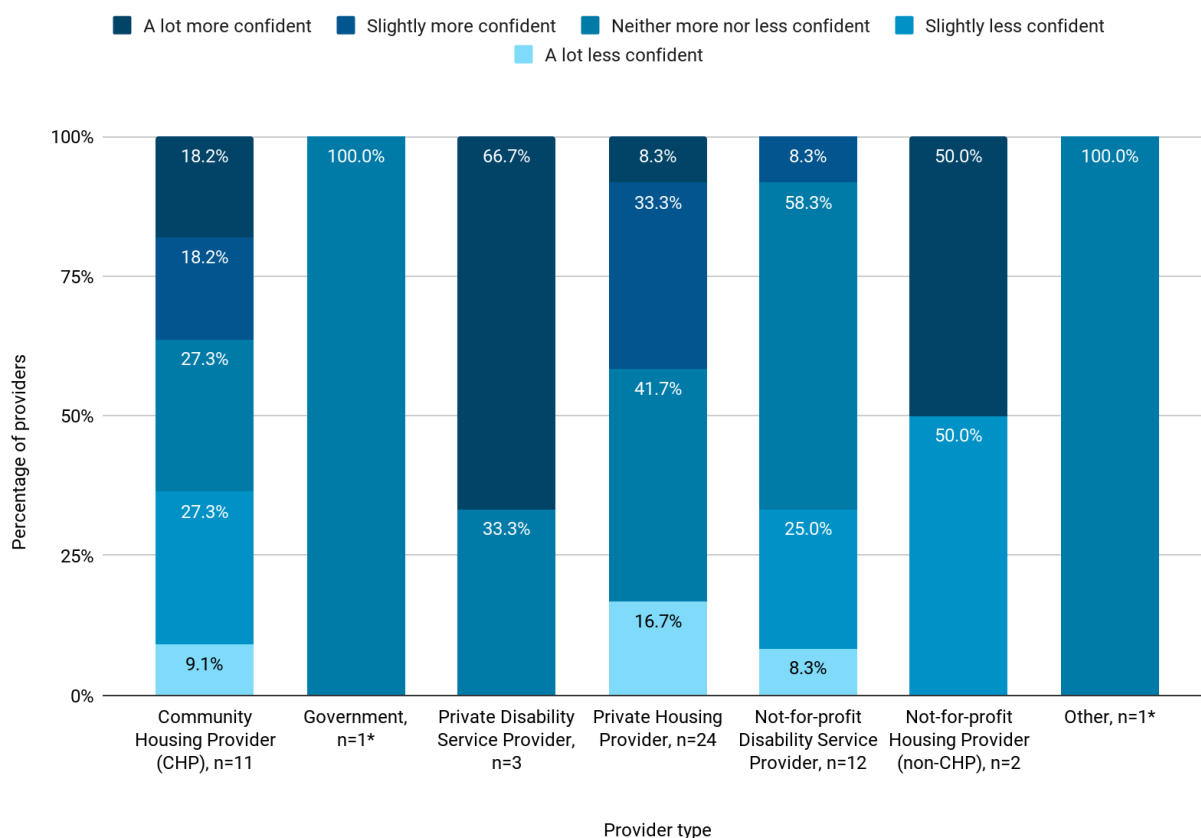
“The Labor Government's commitment to the NDIS Scheme, given that they are the architects of this scheme.” - Respondent 16, Private Housing Provider, a lot more confident

Change in confidence levels by organisation type

Changes in confidence levels were also analysed by organisation type. As seen in Figure 11, private disability service providers were the organisation type that had most commonly experienced increased confidence levels, with 66.7% reporting they felt a lot more confident in the market than last year. In contrast, a decline in confidence levels was most common among not-for-profit housing providers (50.0%), CHPs (36.4%), and not-for-profit disability service providers (33.3%). This aligns with the comparison of current confidence levels in Figure 9 above, which indicated that a lack of market confidence may be slightly more common in the not-for-profit than private sector.³⁰

³⁰ Findings need to be interpreted with caution, as some organisation types comprised only a small sample of respondents

Figure 11 - Change in providers' confidence in the SDA market since 2021 ($n = 54$) by provider type



* Note: 'Government' and 'Other' only consisted of 1 respondent each; therefore, this proportion needs to be interpreted with caution

Property and tenancy management

SDA property management

In total, 87.5% of housing providers managed their own SDA properties (i.e. property maintenance), with only 12.5% of providers stating that other external organisations manage their properties.

The providers who used external property managers most commonly engaged CHPs (57.1%), followed by private companies (28.6%). The majority of providers reported that they were either 'very satisfied' (28.6%), 'satisfied' (28.6%) or 'neither unsatisfied nor satisfied' (28.6%) with their external property manager.

SDA tenancy management

Similar to SDA property management, the majority of the providers stated that they manage SDA tenancies themselves (87.5%), with only 12.5% of providers using other organisations.

Of the providers who used external organisations to manage their tenancies, most providers used external CHPs (57.1%), followed by private companies (28.6%) and social enterprises (14.3%). In contrast to satisfaction with external property managers, the majority of providers reported feeling either 'very unsatisfied' (33.3%) or 'unsatisfied' (33.3%) with their tenancy manager.

Separation of housing and shared support services

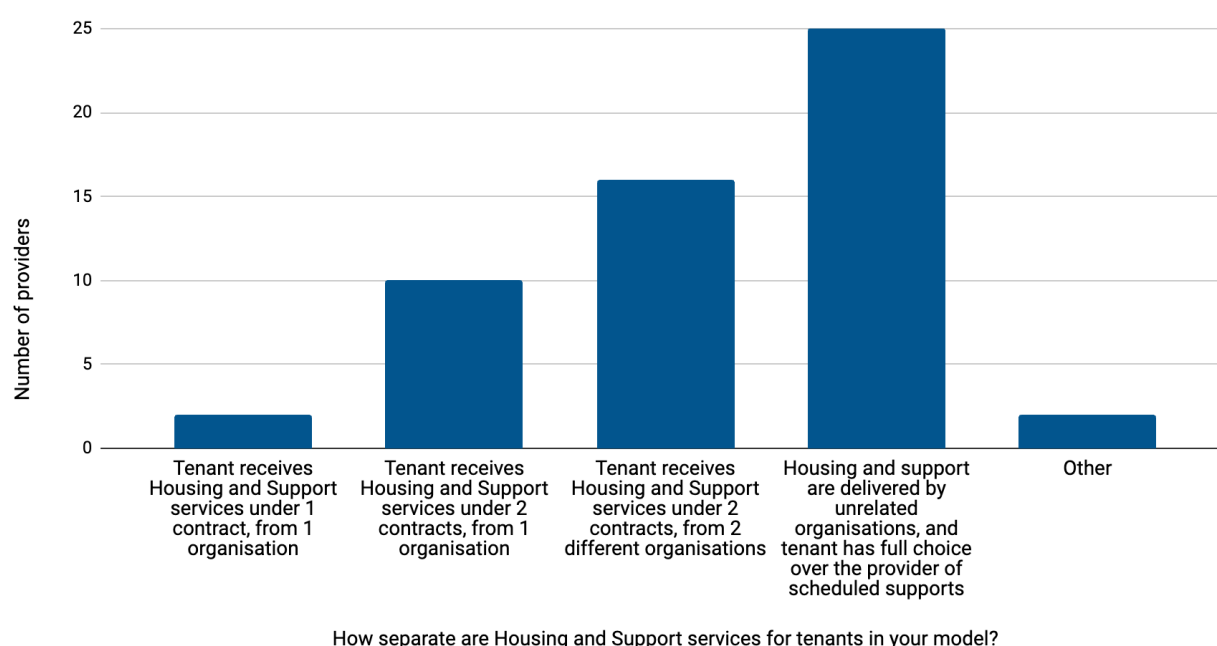
The NDIS encourages housing and support services to be provided by separate organisations within SDA settings. To investigate how this is being implemented in the market, the survey asked providers how separate the housing and support services for tenants are in their SDA dwellings. Responses could range from tenants receiving housing and support from only 1 organisation to tenants having full individual choice over their supports.

Figure 12 depicts that almost half of the providers (45.5%) reported allowing tenants to have full choice over the provider of their shared supports, followed by tenants receiving housing and support services from 2 different organisations and contracts (29.1%). The findings also demonstrated that some providers (21.8%) limit their tenants to receive housing and support services from only 1 organisation.

It is interesting to note that only 37.2% of SDA listings on the Housing Hub offer tenants choice over their Onsite Overnight Assistance (OOA) provider.³¹ This proportion is slightly lower than the proportion of providers in this survey who reported allowing tenants full choice over the provider of their shared supports (45.5%).

³¹ Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Rothman, R. and Aimers, N. (2022, August). *Housing Hub listings snapshot*. Housing Hub and Summer Foundation. <https://www.housinghub.org.au/news/listings-snapshot>

Figure 12 - Models for separation of housing and support services ($n = 55$)



Choice over individual supports

The providers were also asked whether tenants have a choice over which organisation provides their scheduled supports (i.e. individual support for community participation and sometimes personal care that is often separate from onsite shared support). Of the 55 providers asked, 89.1% of providers answered ‘yes’, while 10.9% reported that tenants did not have a choice. Interestingly, when compared to SDA supply on the Housing Hub, a much smaller proportion of listings (47.8%) indicated allowing tenants choice over their individual supports.³²

Needs and preferences of people with disability

Level of understanding needs/preferences of people with disability

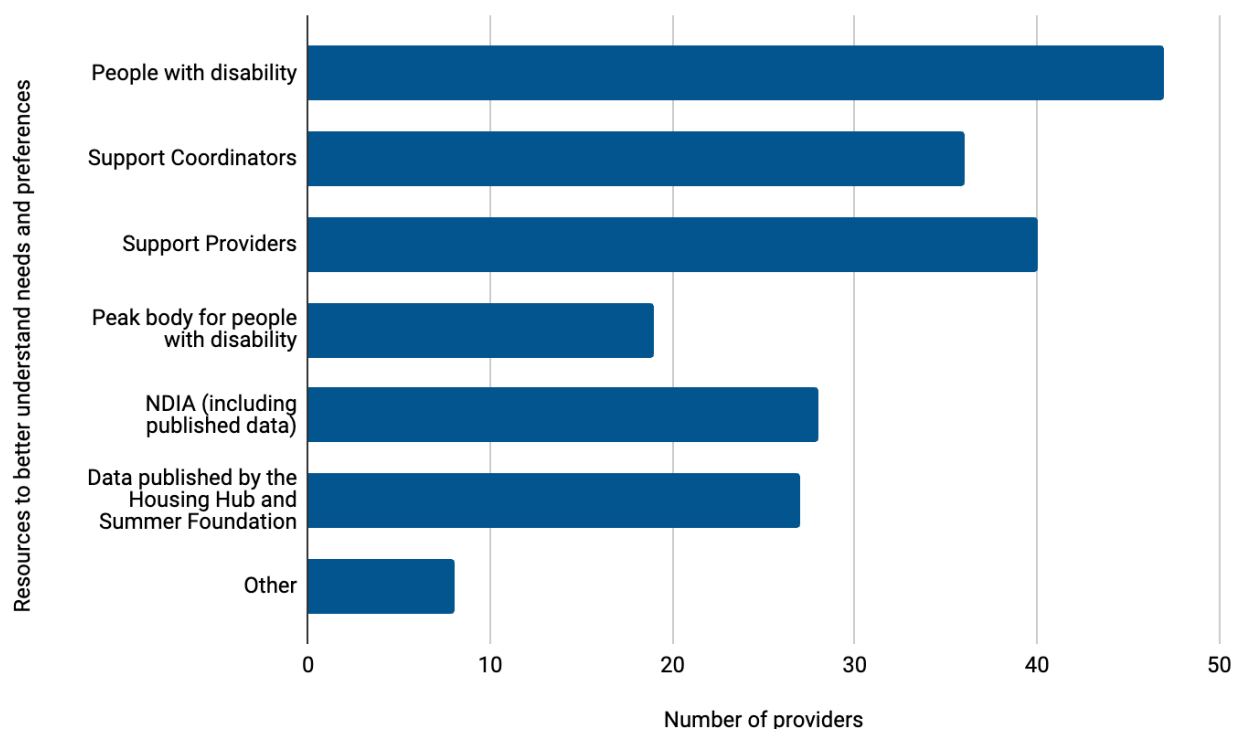
Providers were asked to indicate how much they agreed with the statement “I understand the needs and preferences of people with disability when building our SDA properties”, on a scale of 1-5 (where 1 = strongly disagree to 5 = strongly agree). Similar to the findings of the previous SDA supply report, providers tended to agree with this statement ($M = 3.9$, $SD = 1.1$, $n = 55$). Only 5 providers (9.1%) strongly disagreed with the statement.

³² Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Rothman, R. and Aimers, N. (2022, August). *Housing Hub listings snapshot*. Housing Hub and Summer Foundation. <https://www.housinghub.org.au/news/listings-snapshot>

Resources used to understand needs and preferences

Figure 13 shows the resources that providers reported using to gain a better understanding of the needs and preferences of people with disability and ensure the suitability of any planned SDA development. The majority of providers engaged directly with people with disability (83.9%), closely followed by support providers (71.4%) and support coordinators (64.3%). Half of the providers also consulted with the NDIA (including published data; 50.0%) and data published by the Housing Hub and Summer Foundation (48.2%). ‘Other’ groups that providers (14.3%) reported consulting included family members of people with disability, allied health professionals, and the providers’ own experiences. On average, providers reported using 4 resources ($SD = 1.4$, range = 1-6).

Figure 13 - Resources used by SDA providers ($n = 56$) to gain a better understanding of the needs and preferences of people with disability



Note: Providers could select multiple responses. Examples of data published by the Housing Hub and Summer Foundation were the SDA Supply Survey, SDA Seekers Snapshot, and SDA Listings Snapshot

Questions for people with disability

Only a small proportion (29.1%) of providers indicated they had questions they would like to ask people with disability to better understand their needs and preferences. Providers’ questions frequently centred on how to design SDA properties to meet the needs of potential tenants. This included what housing features, beyond those stipulated by SDA

design categories, people with disability are looking for, as well as how to best support assistive technology in SDA dwellings. Providers also indicated that they would like to know more about the housing and support models preferred by people with disability.

Example questions included:

- “What technology are they bringing into the home or considering and how can the home be better designed to support this?”
- “What are requirements beyond the SDA design guidelines that have made finding a suitable home challenging (e.g. approved for IL [Improved Liveability] but require a quiet home)?”
- “Is there anything unique (not provided within the SDA design guidelines) that will assist you in your day to day living?”
- “What is important to you when deciding on a property to live in?”
- “In an ideal world where funding is not an issue, what housing model is what you really want?”
- “What kind of supports are you hoping to bring into your home?”

Refer to Appendix D for a list of all questions.

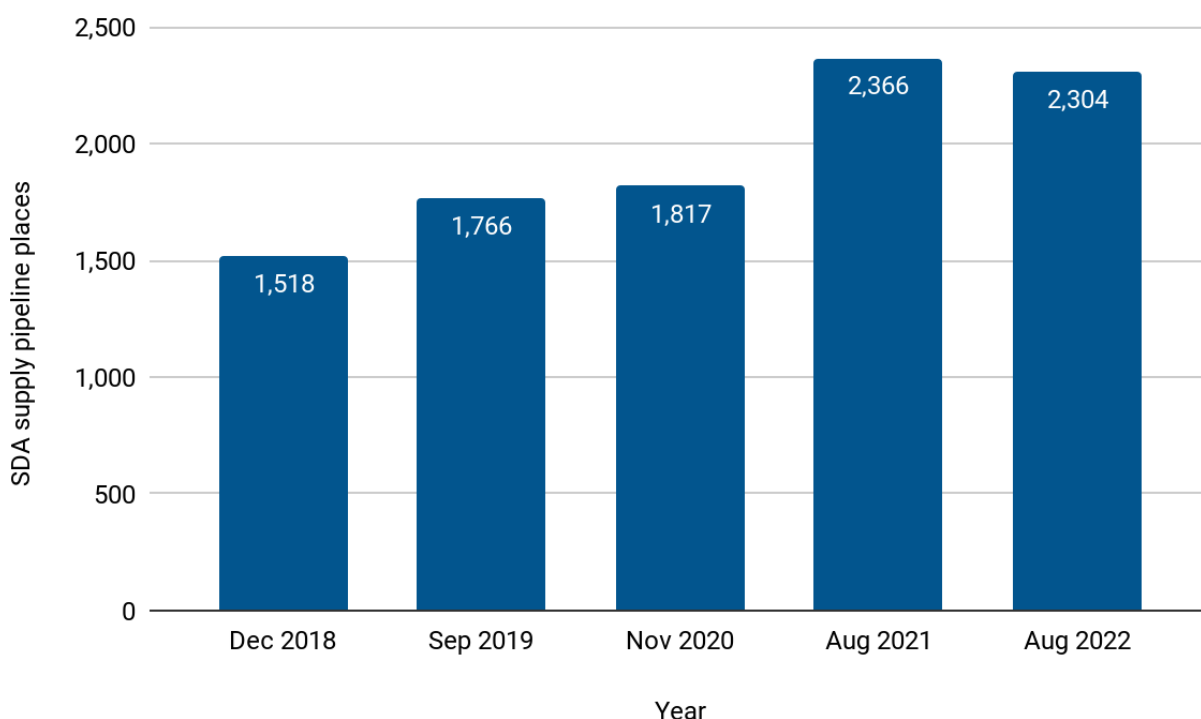


Results: SDA supply pipeline

The pipeline data presented in this section is based on the responses of 62 SDA providers. Together, these providers reported a total of 1,522 SDA dwellings with 2,304 places in the pipeline. This is equivalent to an average of 1.5 SDA residents per dwelling.

When compared to previous iterations of the supply survey, the number of pipeline places reported has been slightly increasing over time. However, there was a slight drop in the number of places reported between 2021-2022. See Figure 14.

Figure 14 - Number of SDA supply pipeline places over time



Please note that the supply survey focuses on SDA dwellings in the *pipeline*, and therefore does not include any completed dwellings that have already been enrolled with the NDIA. This is 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

Refer to Appendix B for a detailed account of the data screening which took place for this section.

SDA supply pipeline: National overview

Maximum number of residents

As can be seen in Table 2, two-thirds (68.0%) of the estimated number of dwellings in the pipeline around Australia will accommodate a maximum of 1 SDA resident. As reported in the previous SDA supply survey, this demonstrates that the market is moving towards properties that enable independent living instead of requiring people with disability to live in larger shared dwellings, such as group homes.

Table 2 - Number and percentage (%) of SDA dwellings ($n = 1,522$) and places ($n = 2,304$) in Australia by maximum number of residents

Maximum number of residents	Dwellings	% of dwellings	Places	% of places
1	1,035	68.0%	1,035	44.9%
2	241	15.8%	482	20.9%
3	200	13.1%	600	26.0%
4	43	2.8%	172	7.5%
5	3	0.2%	15	0.7%

Location

As can be seen in Table 3, SDA developments were reported to be built in all states and territories in Australia. Almost three-quarters of dwellings (73.6%) and places (71.9%) were being built in the eastern states of Australia (i.e. Victoria, New South Wales, and Queensland). Western Australia and South Australia made up a quarter of the dwellings (25.0%) and places (26.2%). Only a very small proportion of dwellings were reported to be in the pipeline in Tasmania, the Australian Capital Territory, and Northern Territory.

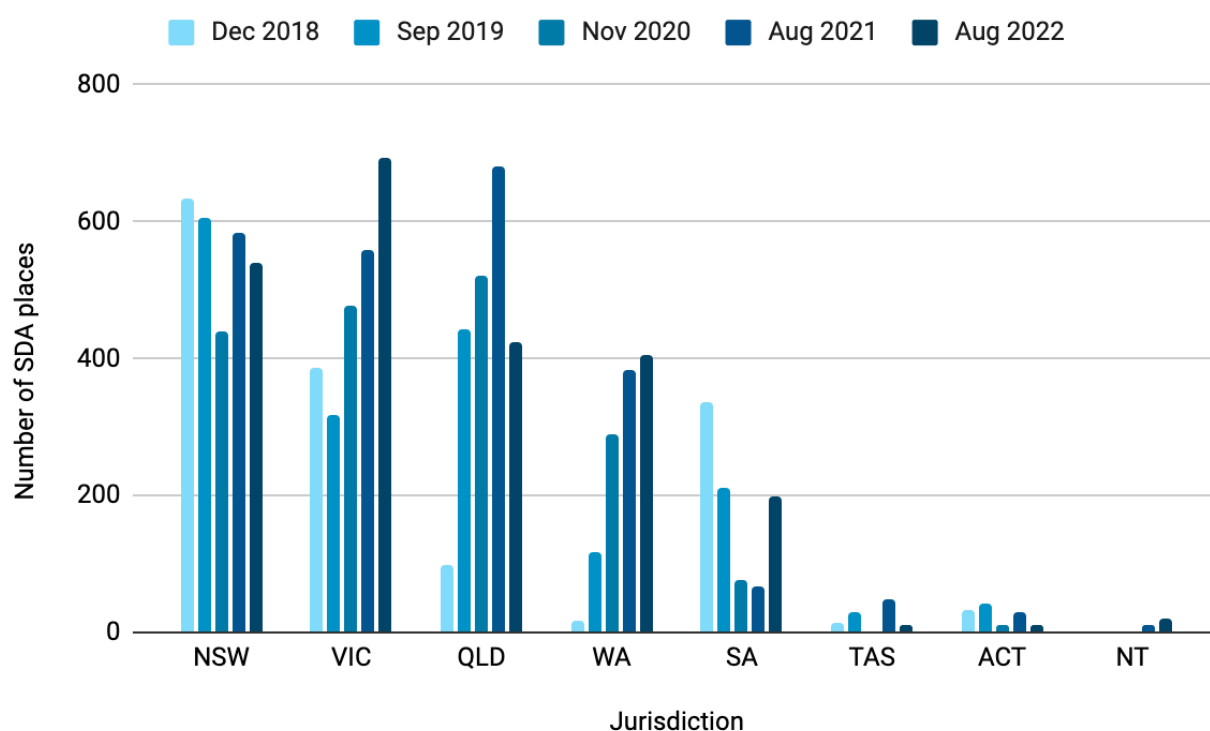
Table 3 - Number and percentage (%) of SDA dwellings ($n = 1,522$) and places ($n = 2,304$) by state and territory

State	Dwellings	% of dwellings	Places	% of places
NSW	358	23.5%	539	23.4%
VIC	497	32.7%	694	30.1%
QLD	265	17.4%	424	18.4%
WA	231	15.2%	406	17.6%
SA	149	9.8%	198	8.6%
TAS	6	0.4%	11	0.5%
ACT	6	0.4%	12	0.5%
NT	10	0.7%	20	0.9%

Figure 15 shows the number of places in development in each state and territory over time, since the first edition of the SDA supply survey in 2018.³³ As can be seen, 4 states (New South Wales, Queensland, Tasmania, and the Australian Capital Territory) experienced a reduction in the number of SDA places in the pipeline since last year. Among these, Queensland saw the largest reduction (from 681 to 424 places), resulting in Queensland no longer being the state with the most SDA pipeline places for the first time since 2020. In contrast, South Australia, Western Australia, the Northern Territory and Victoria have seen an increase in the number of places in development, with Victoria showing a steady increase in pipeline activity since 2019.

³³ SGS Economics and Planning Pty Ltd and Summer Foundation (2018).
<https://www.summerfoundation.org.au/wp-content/uploads/2018/03/SDA-Market-Insights-report-web.pdf>

Figure 15 - A comparison of SDA places in development over time



Building type

According to the Pricing Arrangements for SDA, there are 4 building types that the NDIS provides SDA funding for.³⁴ These are apartments, villas/duplexes/townhouses, houses, and group homes (refer to Appendix A for a brief description).

³⁴ NDIA (2022). *Pricing arrangements for specialist disability accommodation*. National Disability Insurance Agency. <https://www.ndis.gov.au/media/4551/download?attachment>

Unlike last year's SDA supply survey, which indicated that apartments were the predominant building type in the pipeline, this year's survey found an equal proportion of places in apartments, houses, and villas/duplexes/townhouses. More specifically, each of the 3 building types comprised approximately 30% of the SDA pipeline places, with 703 places being developed in apartments, 705 places in villas/duplexes/townhouses, and 709 places in houses. This more even pipeline distribution may indicate a desire of SDA providers to build a wider diversity of building types instead of focusing mainly on apartments. Similar to last year, group homes accounted for the fewest places (187 places; 8.1%). Refer to Figure 16.

Figure 16 - Estimated number of SDA places ($n = 2,304$) by building type across Australia

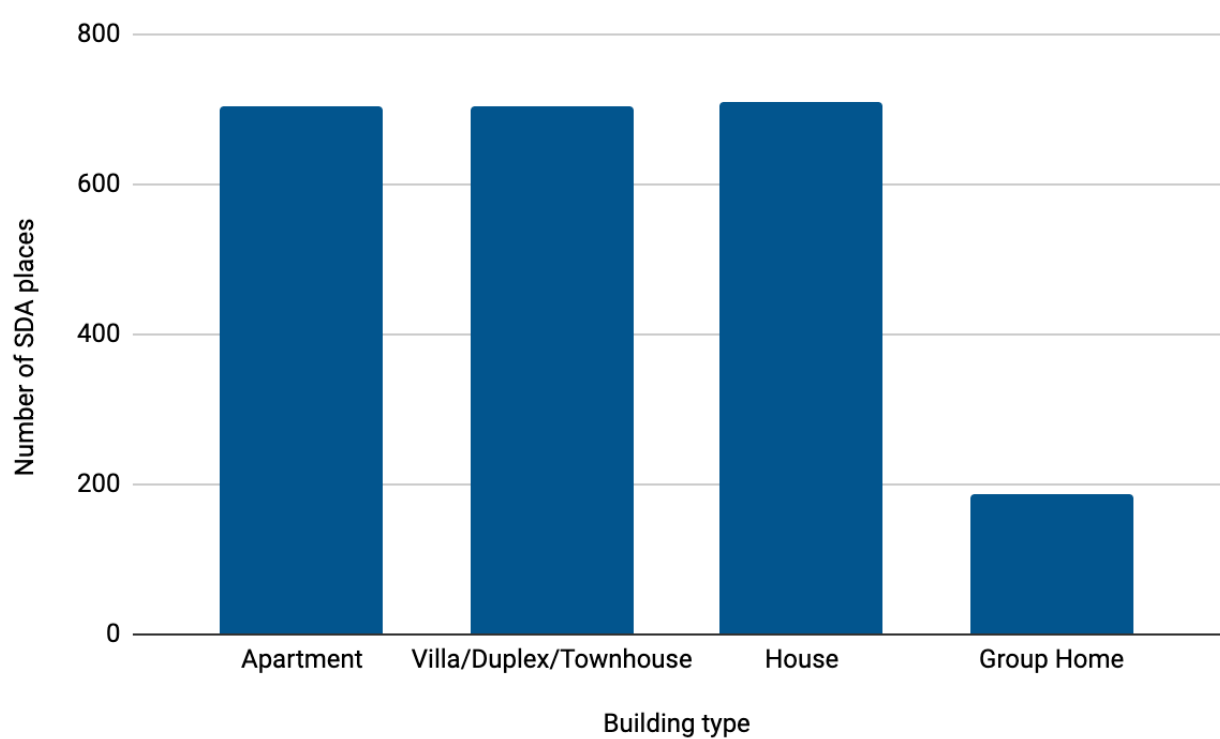
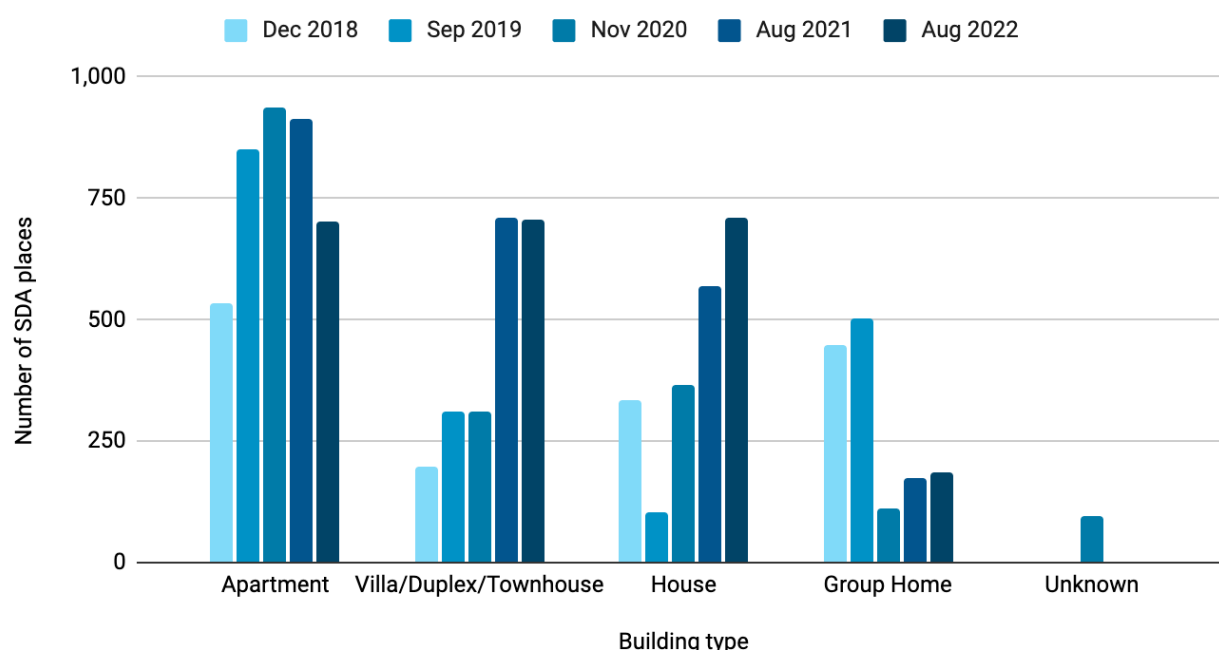


Figure 17 shows a breakdown of the number of pipeline places for each building type across time, between 2018-2022. As can be seen, the number of places in apartments peaked in 2020, and has since then experienced a decrease, particularly between 2021 (913 places) and 2022 (703 places). Pipeline activity for villas/duplexes/townhouses peaked in 2021 and has remained steady in 2022, while places in houses have been growing steadily from 2019 onward.

Group homes have experienced a sharp drop in development activity after 2019, and have since then been the least commonly developed building type. However, there has been a slight upward trend over the last few years, with the number of places increasing slightly by 15 places between 2021-2022. Therefore, while the market appears to be overall moving

away from developing group homes, this dwelling type still represents a small fraction of the pipeline. The movement away from shared dwellings is encouraging, given that research has highlighted a preference for single occupancy SDA dwellings.³⁵

Figure 17 - 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)

Table 4 shows the number of pipeline places for each building type across the different states and territories in Australia. As can be seen, the highest concentration of apartments and villas/duplexes/townhouses was in Victoria and New South Wales, while houses were predominantly being built in Victoria and Queensland. Similar to last year, group homes were predominantly developed in Western Australia. Tasmania, the Australian Capital Territory and the Northern Territory had the fewest pipeline places across all building types.

³⁵ Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022). *Housing seeker snapshot*. Housing Hub and Summer Foundation.
<https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers?cs=reports-and-publications&ct=Publications%20&%20reports>

Table 4 - Estimated number of SDA places ($n = 2,304$) across building type for each jurisdiction

State/ Territory	Apartment	Group home	House	Villa/Duplex/ Townhouse
NSW	194	58	157	130
VIC	233	20	198	243
QLD	128	12	204	80
WA	78	84	124	120
SA	69	13	20	96
TAS	1	0	0	10
ACT	0	0	0	12
NT	0	0	6	14

A more detailed snapshot of the estimated number of SDA places reported by building type is provided in Table 5. Similar to last year's supply survey, almost half of the reported SDA places were accounted for by 1 resident dwellings, with villas/duplexes/townhouses providing the most (16.4%), followed by 2 bedroom apartments (14.2%) and 1 bedroom apartments (14.0%).

There was also a large proportion of places (21.0%) in 3 resident houses. This is concerning, as this type of shared accommodation is unlikely to meet the preferences of people with disability.³⁶ Indeed, the Housing Hub team has observed that a large proportion of tenants being approved for this type of housing have needed to seek a review or appeal their funding outcome, as it does not meet their needs and preferences.

The least prevalent building types were 3 bedroom apartments and 5 resident group homes.

³⁶ Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022). *Housing seeker snapshot*. Housing Hub and Summer Foundation.
<https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers?cs=reports-and-publications&ct=Publications%20&%20reports>

Table 5 - Estimated number and percentage (%) of SDA dwellings ($n = 1,522$) and places ($n = 2,304$) by building type (granular breakdown)

Building type	Dwellings	% of dwellings	Places	% of places
Apartment, 1 bedroom, 1 resident	322	21.2%	322	14.0%
Apartment, 2 bedrooms, 1 resident	327	21.5%	327	14.2%
Apartment, 2 bedrooms, 2 residents	27	1.8%	54	2.3%
Apartment, 3 bedrooms, 2 residents	0	0%	0	0%
Group home, 4 residents	43	2.8%	172	7.5%
Group home, 5 residents	3	0.2%	15	0.7%
House, 2 residents*	117	7.7%	226	9.8%
House, 3 residents	161	10.6%	483	21.0%
Villa/Duplex/Townhouse, 1 resident	378	24.8%	378	16.4%
Villa/Duplex/Townhouse, 2 residents	99	6.5%	198	8.6%
Villa/Duplex/Townhouse, 3 residents*	45	3.0%	129	5.6%
Total	1,522	100%	2,304	100%

*Note: Some providers stated that their 2-resident houses would only be offered to 1 tenant, and their 3-resident villas would only be offered to 2 residents. Therefore, the number of places does not match the number of dwellings for these building types

Design category

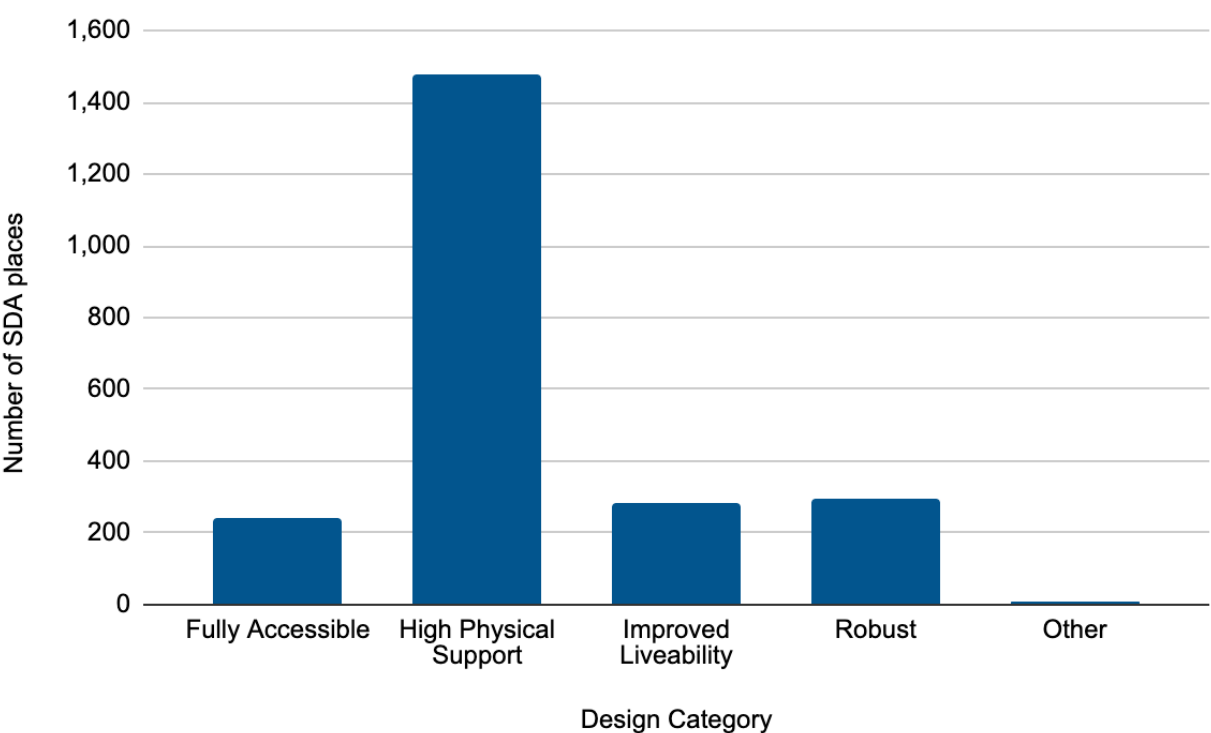
According to the SDA pricing arrangements, there are 4 design categories for New Build SDA dwellings that the NDIS provides funding for.³⁷ These are: Fully Accessible, High Physical Support, Improved Liveability and Robust (refer to Appendix A for a brief description).

Figure 18 shows the estimated number of SDA places reported for each design category across Australia. Similar to last year, High Physical Support accounted for the greatest number of SDA places (1,480 places; 64.2%), followed by an approximately equal proportion of places classified as Robust (295 places; 12.8%), Improved Liveability (281 places; 12.2%), and Fully Accessible (242 places; 10.5%). However, as mentioned in last year's supply survey, these findings should be interpreted with caution as some providers have indicated that they may not limit their properties to only 1 particular design category (i.e. the providers may accept Fully Accessible funded tenants in a High Physical Support dwelling).

For the first time, this year's survey offered providers the option to indicate if they develop SDA dwellings that do not fit any of the above 4 categories – this option is referred to as 'Other' throughout this report. In total, there were 6 places (0.3%) in the 'Other' design category, all of which were a combination of either (1) High Physical Support and Robust design, or (2) Fully Accessible and Improved Liveability design.

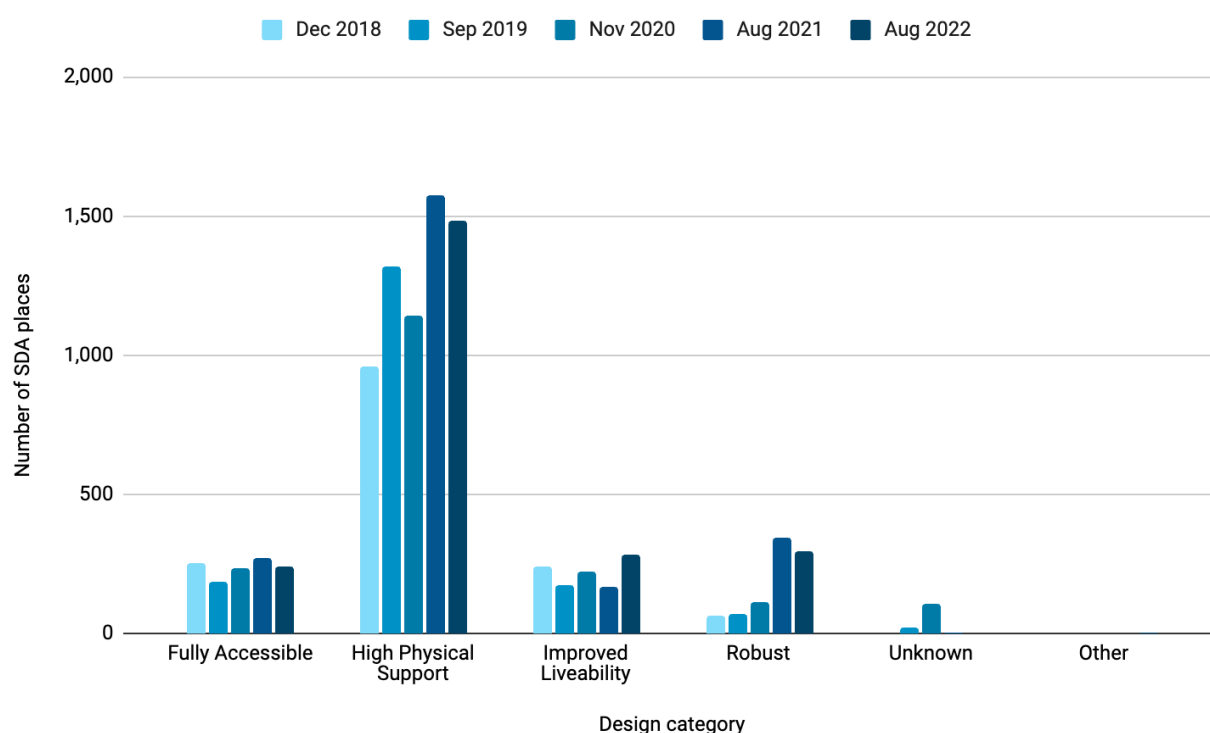
³⁷ NDIA (2022). *Pricing arrangements for specialist disability accommodation*. National Disability Insurance Agency. <https://www.ndis.gov.au/media/4551/download?attachment>

Figure 18 - Estimated number of SDA places ($n = 2,304$) by design category across Australia



As can be seen in Figure 19, High Physical Support has consistently been the most prevalent SDA design category in the pipeline since 2018, though the number of places for this design category has decreased slightly this year compared to last year (from 1,577 in 2021 to 1,480 places in 2022). After a strong increase in 2021, the number of Robust places has also dropped slightly this year. The number of Improved Livability places has increased since last year’s survey (from 167 to 281 places), and is now for the first time exceeding the number of Fully Accessible places.

Figure 19 - A comparison of SDA places in development by design category over time



**Note: There were 6 places with an 'Unknown' design category in Aug 2021, and 6 places with the design category 'Other' in Aug 2022 - these numbers cannot be seen in this figure as they were too small to be displayed. The design category 'Other' was assessed for the first time in this year's SDA supply survey and was not an available option in previous supply surveys.*

A breakdown of the design categories by jurisdiction is shown in Table 6. As can be seen, High Physical Support was the predominant design category in the pipeline across all states and territories, except South Australia. Victoria had the greatest number of High Physical Support places (413 places), closely followed by Western Australia (345 places), Queensland (339 places) and New South Wales (270 places). In South Australia, the most prevalent design category was Improved Liveability, comprising 95 places.

Table 6 - Estimated number of SDA places ($n = 2,304$) across design category for each jurisdiction

State/ Territory	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
NSW	83	270	103	83	0
VIC	115	413	46	117	3
QLD	10	339	15	60	0
WA	21	345	22	15	3
SA	10	80	95	13	0
TAS	0	9	0	2	0
ACT	0	12	0	0	0
NT	3	12	0	5	0

Building type and design category

Table 7 shows the number of places in the pipeline by both building type and design category. High Physical Support was the design category with the greatest number of places across all building types. Apartments were the most common building type among the High Physical Support places (555 places), followed by houses (445 places) and villas/duplexes/townhouses (337 places). Group homes were the least represented building type across all design categories.

Table 7 - Estimated number of SDA places ($n = 2,304$) across building type and design category in Australia

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	90	555	58	0*	0
Villa/Duplex/Townhouse	89	337	118	158	3
House	47	445	93	121	3
Group home	16	143	12	16	0

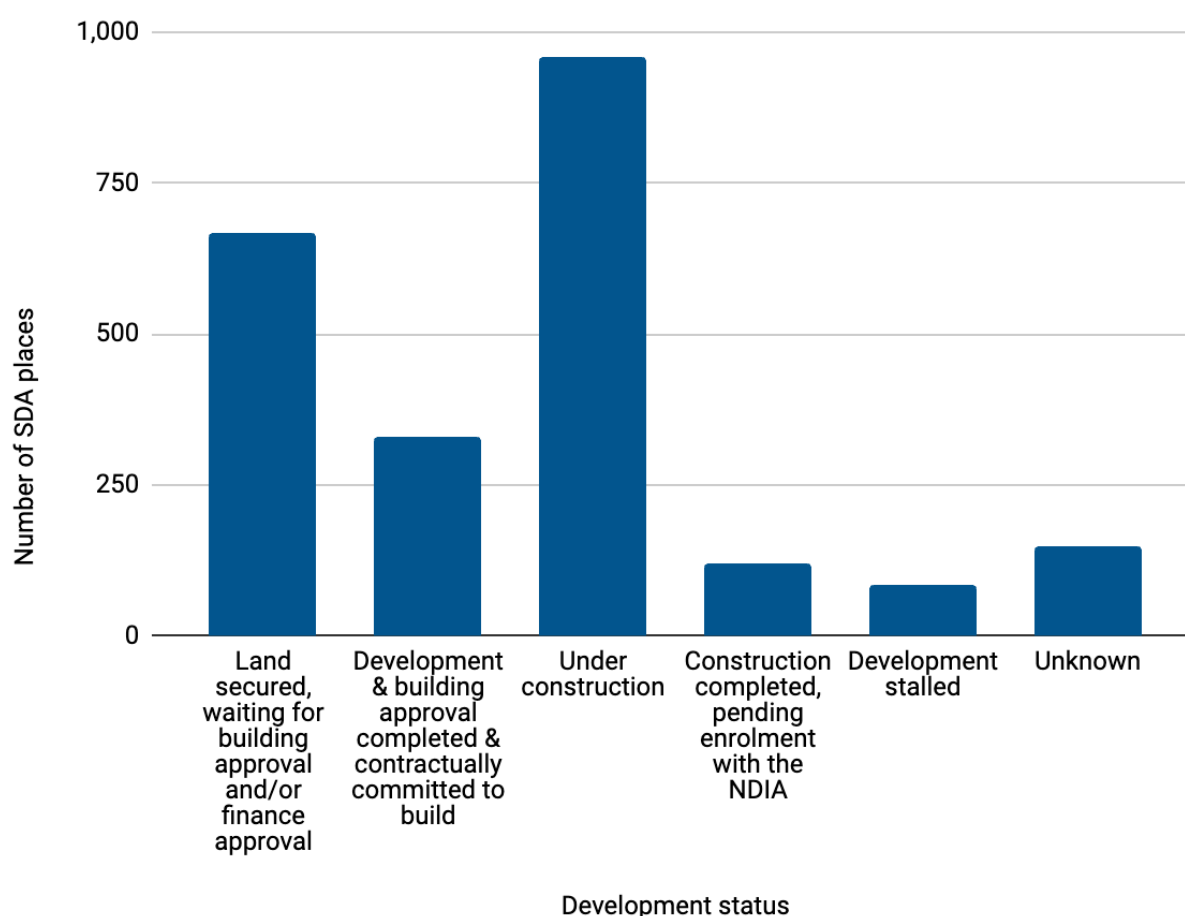
* Note: The SDA Pricing and Payments guide does not allow Robust design in apartments

SDA development status

The survey asked providers to indicate the development status of their SDA projects reported to be in the pipeline. As can be seen in Figure 20, more than 40% of the SDA places were under construction (959 places), making this the most common development stage. This was followed by the earliest development stage 'land secured, waiting for building approval and/or finance approval' with 666 places (28.9%). This development status could be classified as the most at risk of not reaching enrolment, because many developments in this stage may not go ahead, highlighting that the number of SDA dwellings and places in the pipeline should be interpreted with caution.

There were 84 places (3.6%) for which development had stalled, which represents an increase from the 31 stalled SDA places reported in last year's survey. Some providers indicated that they were no longer able to progress their developments due to external factors like natural disasters as well as the rising costs of construction.

Figure 20 - Estimated number of SDA places ($n = 2,304$) by development status in Australia

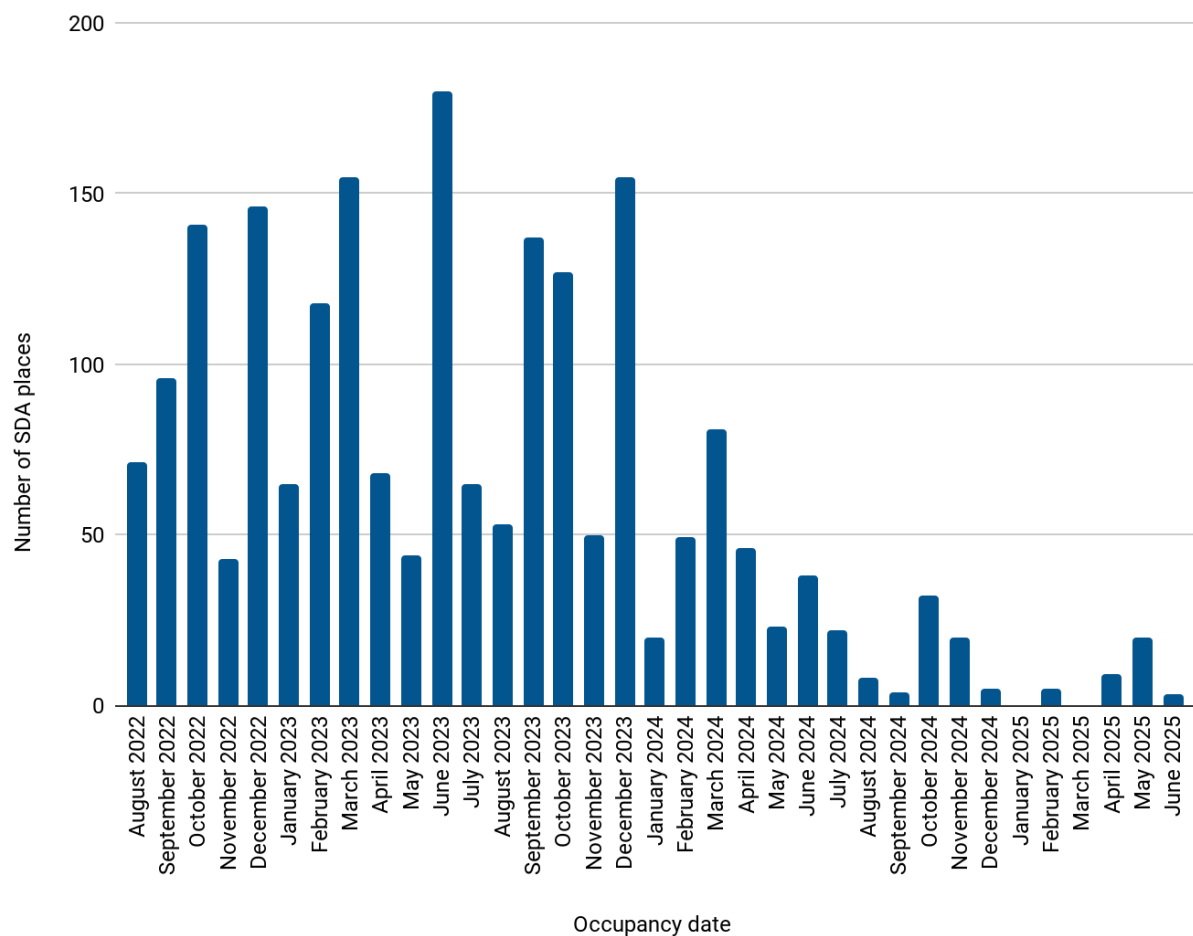


Note: The 149 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2021 pipeline data for which the current development status was unknown

Estimated occupancy date

As seen in Figure 21, the estimated occupancy dates for the pipeline places spanned almost 3 years, ranging from August 2022 to June 2025. The majority of places (1,714; 81.7%) currently in the pipeline were estimated to be available for occupancy by the end of next year (December 2023). This is similar to the pipeline reported in last year's survey, which predominantly consisted of places estimated to be available within a year after the survey closing date.

Figure 21 - Estimated number of SDA places ($n = 2,099$) by estimated date of occupancy in Australia



Note: Date of occupancy was unknown for 205 SDA places. 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

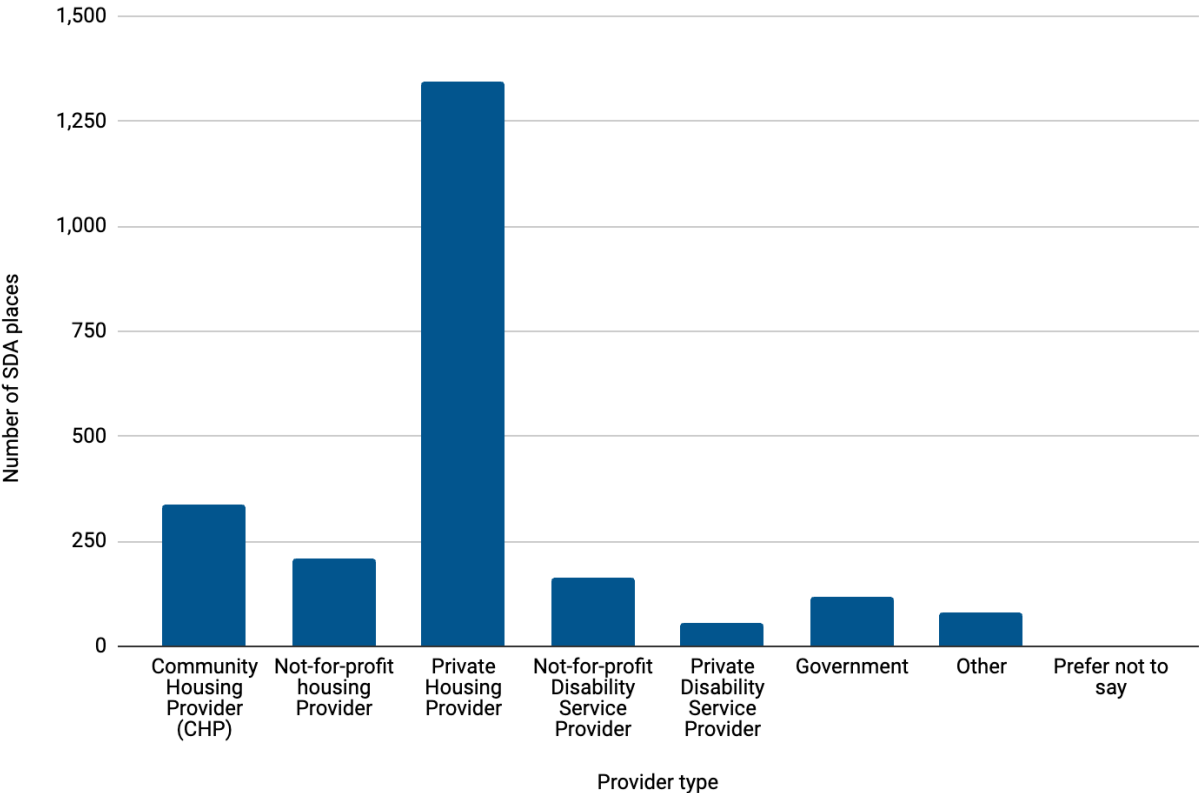
SDA provider and developer profiles

Figure 22 highlights the estimated number of SDA places by provider type across Australia, and Figure 23 presents a comparison of this activity since the first supply survey in 2018.

As seen in Figure 22, more than half of the SDA places in the pipeline were being built by private housing providers (1,343 places; 58.3%). This was followed by a much smaller number of places being developed by CHPs (336 places; 14.6%) and not-for-profit disability service providers (163 places; 7.1%). The low proportion of places being developed by not-for-profit disability service providers is interesting given that this group comprised 22.8% of the providers participating in this survey (see Figure 1 under ‘Provider

demographics’). This suggests that the providers in this category may tend to have smaller pipelines compared to other organisation types.

Figure 22 - Estimated number of SDA places (n = 2,304) by provider type in Australia



Note: There was 1 provider who was both a not-for-profit disability service provider and a CHP. This provider was classified as ‘Other’.

Private housing providers have reported the highest number of SDA places in the pipeline since 2019, though they have experienced a slight reduction since last year. The number of places provided by not-for-profit housing providers and not-for-profit disability service providers has also declined slightly since last year. In contrast, private disability service providers reported slightly more development activity this year in comparison to the survey last year, and pipeline activity of CHPs and the government has steadily increased since 2020. See Figure 23.

Figure 23 - A comparison of the estimated number of SDA places by provider type over time

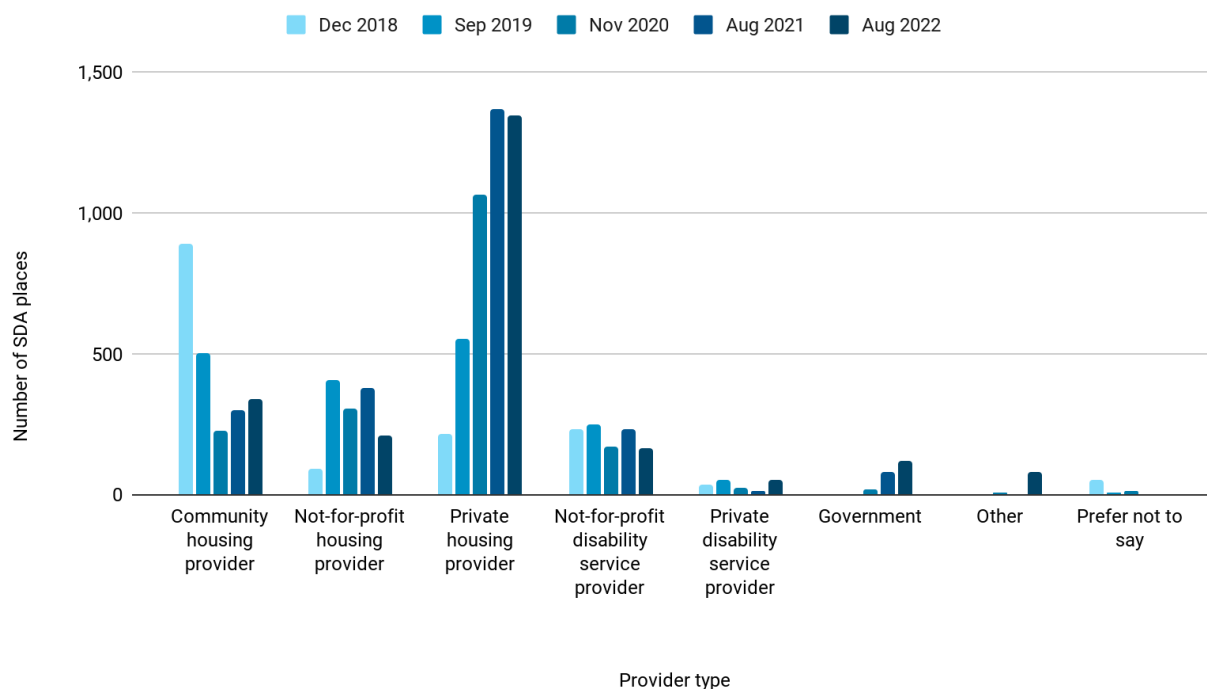
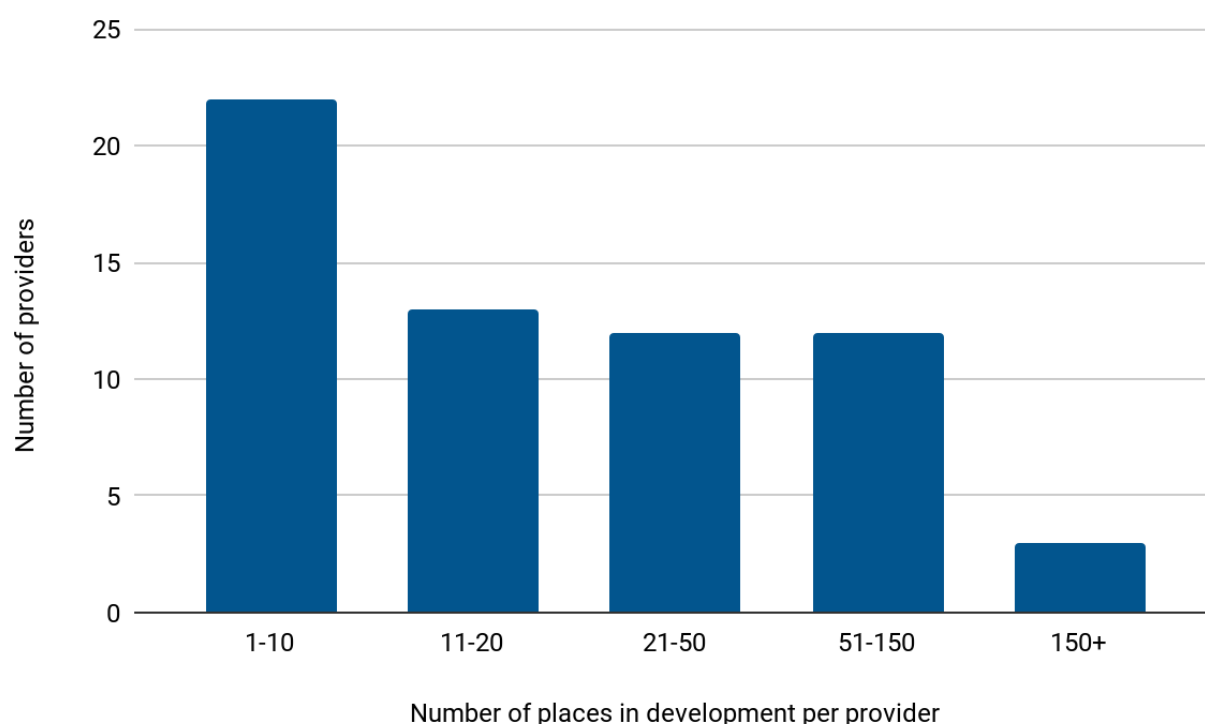


Figure 24 illustrates SDA providers by their scale of development activity, defined as the number of SDA places in the pipeline. Of the participants, 22 providers (35.5%) developed between 1-10 SDA places, making this the most common scale of development activity. This was followed by a relatively even number of providers developing 11-20 places (13 providers; 21.0%), 21-50 places (12 providers; 19.4%), and 51-150 places (12 providers; 19.4%). These development scales represent a drop from last year's survey, which indicated a higher proportion of providers developing between 51-150 SDA places. The smaller pipelines reported this year may indicate that providers are starting to embark on fewer new SDA projects.

Figure 24 - SDA providers by scale of their development activity ($n = 62$)



Provision of on-site overnight assistance (OOA)

The provision of on-site overnight assistance (OOA) was common, with almost all dwellings (1,397; 91.8%) reported to be built to provide OOA.

When broken down by design categories, it can be seen that almost all High Physical Support (97.5%), Robust (96.5%) and Fully Accessible (87.0%) dwellings currently in the pipeline will provide OOA upon completion. Improved Liveability dwellings were more evenly split, with 55.8% being built to provide OOA. See Figure 25.

Figure 25 - Provision of OOA by design category ($n = 1,522$)

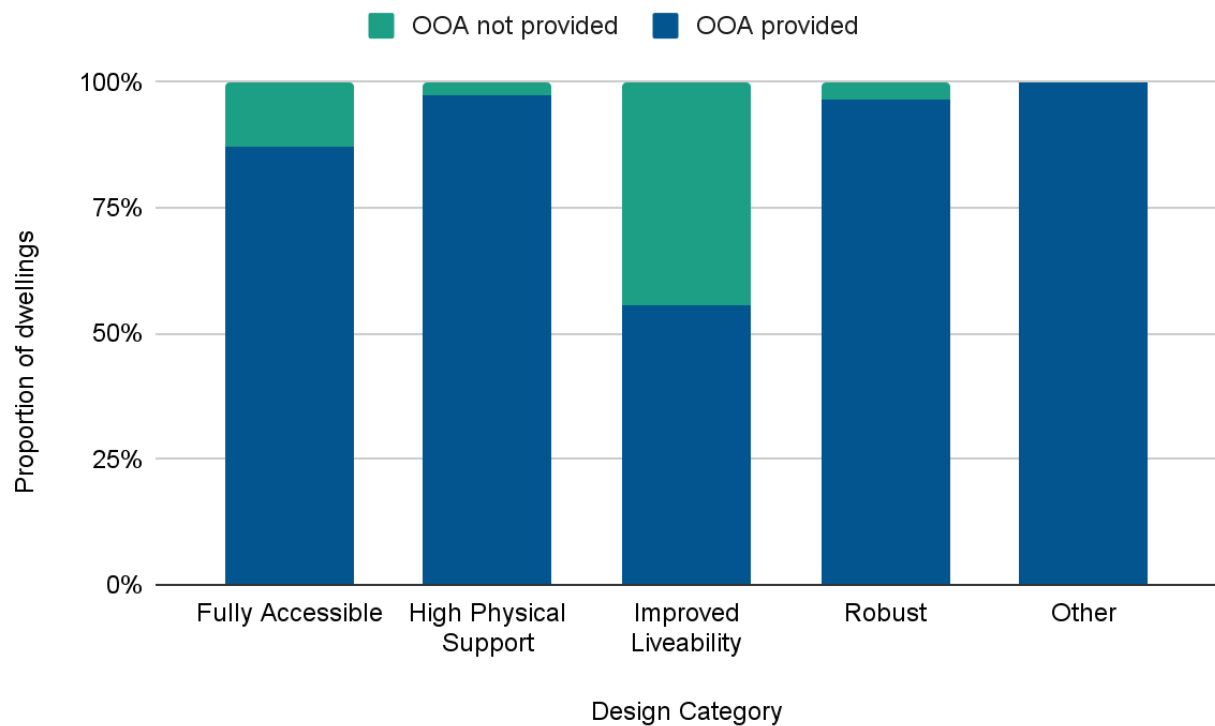
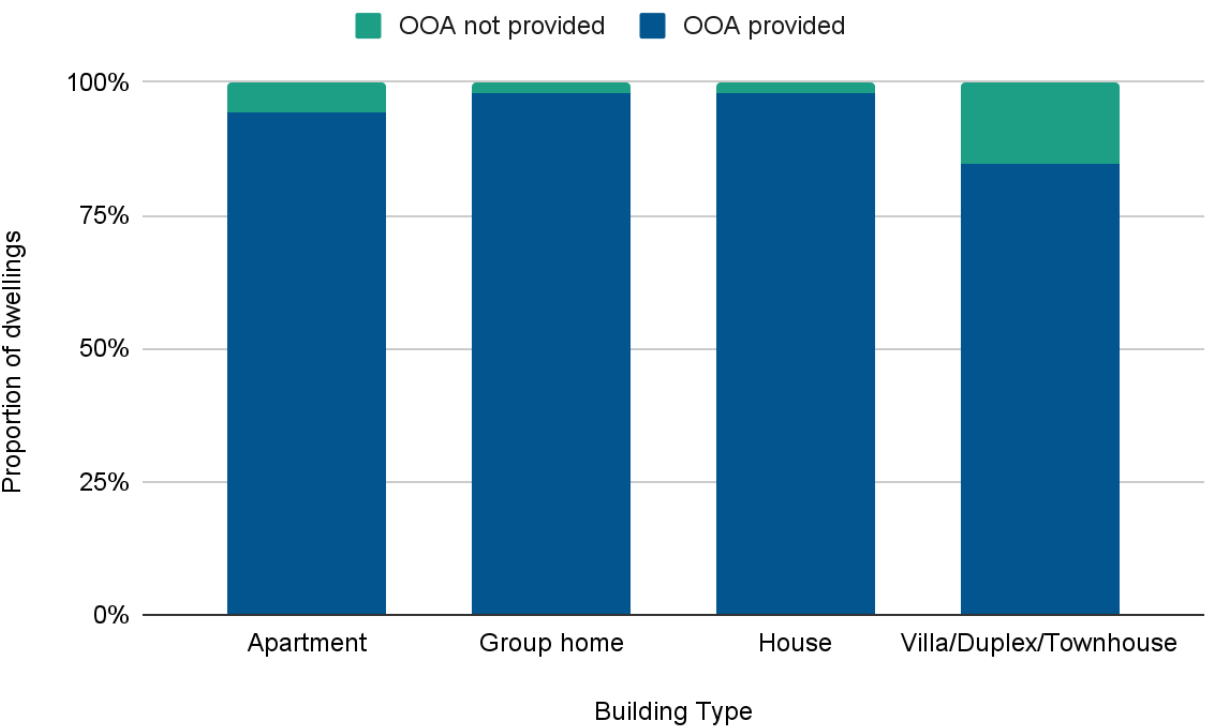


Figure 26 shows the provision of OOA by building types. As can be seen, the majority of apartments (94.4%), group homes (97.8%) and houses (97.8%) were being built to enable OOA provision upon completion. The provision of OOA was only slightly lower for villas/duplexes/townhouses (84.7%).

Figure 26 - Provision of OOA by building type (n = 1,522)



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

A total of 358 dwellings or 539 SDA places were reported to be in development in New South Wales, which represents a slight decrease from the number of places reported in the previous survey (585 places).

As seen in Table 8, the greatest number of SDA places were accounted for by High Physical Support apartments (126 places), followed by High Physical Support houses (79 places). In comparison to the previous survey, there has been a small reduction in places with Robust design (from 107 to 83 places).

Table 8 - Estimated number of SDA places across building type and design category in New South Wales ($n = 539$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	46	126	22	0	0
Villa/Duplex/Townhouse	22	31	38	39	0
House	7	79	39	32	0
Group home	8	34	4	12	0

As seen in Table 9, 36.5% of SDA places in New South Wales were under construction at the time of this survey. This was followed by 33.0% of places with the development status 'Land secured, waiting for building approval and/or finance approval'.

Table 9 - 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
Construction completed, pending enrolment with the NDIA	19	5.3%	24	4.5%
Under construction	144	40.2%	197	36.5%
Development & building approval completed & contractually committed to build	64	17.9%	109	20.2%
Land secured, waiting for building approval and/or finance approval	107	29.9%	178	33.0%
Development stalled	19	5.3%	26	4.8%
Unknown	5	1.4%	5	0.9%
TOTAL	358	100%	539	100%

Note: The 5 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2021 pipeline data for which the current development status was unknown

As seen in Table 10, 39.0% of SDA places in New South Wales were being developed by private housing providers, followed by CHPs (21.7% of places) and not-for-profit disability service providers (20.4% of places).

Table 10 - Estimated number and percentage (%) of SDA dwellings and places by provider type in New South Wales

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	63	17.6%	117	21.7%
Not-for-profit housing Provider	10	2.8%	10	1.9%
Private Housing Provider	134	37.4%	210	39.0%
Not-for-profit Disability Service Provider	69	19.3%	110	20.4%
Private Disability Service Provider	13	3.6%	13	2.4%
Government	0	0%	0	0%
Other	69	19.3%	79	14.7%
TOTAL	358	100%	539	100%

Note: The 'other' category consisted of a provider who was both a not-for-profit disability service provider and community housing provider

Victoria

A total of 497 dwellings or 694 SDA places were reported to be in development in Victoria, an increase in the number of places previously reported (559 places).

As seen in Table 11, almost a third of the SDA places in development were High Physical Support apartments (201 places), followed by High Physical Support villas/duplexes/townhouses (126 places) and High Physical Support houses (78 places). A relatively large number of places (69 places) in Robust villas/duplexes/townhouses were also reported to be developed. Compared with the previous survey, there were slightly fewer places in group homes across all design categories except for Fully Accessible.

Table 11 - Estimated number of SDA places across building type and design category in Victoria ($n = 694$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	26	201	6	0	0
Villa/Duplex/Townhouse	44	126	4	69	0
House	37	78	36	44	3
Group home	8	8	0	4	0

As seen in Table 12, almost half (40.6%) of Victoria's SDA pipeline places were under construction, followed by 30.3% of places for which the providers had secured land and were waiting for building and/or finance approval.

Table 12 - 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
Construction completed, pending enrolment with the NDIA	35	7.0%	41	5.9%
Under construction	241	48.5%	282	40.6%
Development & building approval completed & contractually committed to build	69	13.9%	91	13.1%
Land secured, waiting for building approval and/or finance approval	116	23.3%	210	30.3%
Development stalled	3	0.6%	5	0.7%
Unknown	33	6.6%	65	9.4%
TOTAL	497	100%	694	100%

Note: The 65 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2021 pipeline data for which the current development status was unknown

The pipeline activity in Victoria was heavily dominated by private housing providers, who reported developing almost two-thirds (64.8%) of the SDA pipeline places in Victoria. See Table 13.

Table 13 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Victoria

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	25	5.0%	33	4.8%
Not-for-profit housing provider	48	9.7%	60	8.6%
Private housing provider	354	71.2%	450	64.8%
Not-for-profit disability service provider	9	1.8%	25	3.6%
Private disability service provider	7	1.4%	7	1.0%
Government	54	10.9%	119	17.1%
Other	0	0%	0	0%
TOTAL	497	100%	694	100%

Queensland

A total of 265 dwellings or 424 SDA places were estimated to be in development in Queensland, indicating a significant decrease in the number of SDA pipeline places since last year (681 places).

As seen in Table 14, pipeline activity in Queensland was heavily concentrated in the High Physical Support design category, with more than two-fifths of the SDA places (41.5%; 176 places) being accounted for by High Physical Support houses. This was followed by High Physical Support apartments at 103 places. It is interesting to note that although High Physical Support apartments comprised the second most places in development, the number of places in this category has more than halved in comparison to the previous survey (from 241 places in 2021 to 103 places this year). Places with Robust design have also strongly decreased across almost all building types since last year's supply survey, and only very few places were reported to be built with Fully Accessible or Improved Liveability design.

Table 14 - Estimated number of SDA places across building type and design category in Queensland ($n = 424$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	10	103	15	0	0
Villa/Duplex/Townhouse	0	48	0	32	0
House	0	176	0	28	0
Group home	0	12	0	0	0

As seen in Table 15, almost half (45.8%) of all SDA places in development in Queensland were under construction, while 21.5% of places had land secured and were waiting on building and/or finance approval. This was followed by 13.7% of places that were contractually committed to build.

Table 15 - 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
Construction completed, pending enrolment with the NDIA	15	5.7%	40	9.4%
Under construction	132	49.8%	194	45.8%
Development & building approval completed & contractually committed to build	45	17.0%	58	13.7%
Land secured, waiting for building approval and/or finance approval	48	18.1%	91	21.5%
Development stalled	15	5.7%	20	4.7%
Unknown	10	3.8%	21	5.0%
TOTAL	265	100%	424	100%

Note: The 21 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2021 pipeline data for which the current development status was unknown

Similar to Victoria, the private building sector dominated the pipeline activity in Queensland, with more than three-quarters (76.4%) of SDA places being developed by private housing providers. See Table 16.

Table 16 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Queensland

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	27	10.2%	46	10.8%
Not-for-profit housing Provider	20	7.5%	20	4.7%
Private Housing Provider	198	74.7%	324	76.4%
Not-for-profit Disability Service Provider	0	0%	0	0%
Private Disability Service Provider	20	7.5%	34	8.0%
Government	0	0%	0	0%
Other	0	0%	0	0%
TOTAL	265	100%	424	100%

Western Australia

A total of 231 dwellings or 406 SDA places were in development in Western Australia, an increase in the number of SDA places reported in the previous survey (384 places).

As seen in Table 17, the majority of SDA places were again for High Physical Support design, with a relatively even split across houses (100 places), villas/duplexes/townhouses (87 places), group homes (80 places), and apartments (78 places). Interestingly, the number of places in Fully Accessible villas/duplexes/townhouses in the pipeline this year was the same as what was reported in the previous survey. Improved Liveability and Robust SDA places have increased slightly in comparison to last year.

Table 17 - Estimated number of SDA places across building type and design category in Western Australia ($n = 406$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	0	78	0	0	0
Villa/Duplex/Townhouse	21	87	6	3	3
House	0	100	12	12	0
Group home	0	80	4	0	0

As seen in Table 18, more than a third (38.4%) of SDA places were currently under construction, followed by 28.6% of places for which land has been secured. Interestingly, the number of places under construction has more than doubled, while the number of places with land secured (the earliest development stage) has almost halved since last year's survey. This may suggest that while providers in Western Australia are progressing with the development of their SDA projects from the previous year, they are committing to fewer new developments.

Table 18 - 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
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Under construction	126	54.5%	156	38.4%
Development & building approval completed & contractually committed to build	22	9.5%	46	11.3%
Land secured, waiting for building approval and/or finance approval	44	19.0%	116	28.6%
Development stalled	18	7.8%	32	7.9%
Unknown	21	9.1%	56	13.8%
TOTAL	231	100%	406	100%

Note: The 56 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2021 pipeline data for which the current development status was unknown.

As seen in Table 19, the majority of places in development were again reported by private housing providers (75.4%). No CHPs, private disability service providers, or governments were represented in Western Australia's pipeline activity.

Table 19 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Western Australia

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	0	0%	0	0%
Not-for-profit housing provider	43	18.6%	78	19.2%
Private housing provider	181	78.4%	306	75.4%
Not-for-profit disability service provider	7	3.0%	22	5.4%
Private disability service provider	0	0%	0	0%
Government	0	0%	0	0%
Other	0	0%	0	0%
TOTAL	231	100%	406	100%

South Australia

A total of 149 dwellings or 198 SDA places were estimated to be in development in South Australia. This is almost triple the number of SDA places reported in the previous survey (68 places), suggesting that the pipeline in South Australia is expanding.

In contrast to the other states above, the most commonly built design category in South Australia was Improved Liveability (95 places) rather than High Physical Support (80 places). Of the Improved Liveability places, most places (73.7%; 70 places) were in villas/duplexes/townhouses. In comparison, no Improved Liveability places were reported in last year's survey, indicating that this design category is experiencing rapid growth in South Australia. Robust dwellings have also slightly increased since last year, from 4 to 13 places. See Table 20.

Table 20 - Estimated number of SDA places across building type and design category in South Australia ($n = 198$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	8	46	15	0	0
Villa/Duplex/Townhouse	2	13	70	11	0
House	0	12	6	2	0
Group home	0	9	4	0	0

Unlike the previous supply survey, which mainly (86.8%) consisted of places under construction, the pipeline this year had more activity in the earlier stages of development. More specifically, the percentage of places under construction decreased to 54.5%, while the percentage of places waiting for building and/or finance approval increased from 5.9% last year to 28.8% this year. The increased number of projects in the earlier stages of the development cycle further supports the finding that the pipeline in South Australia has started to expand this year. See Table 21 for an overview of all development statuses.

Table 21 - 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
Construction completed, pending enrolment with the NDIA	13	8.7%	13	6.6%
Under construction	87	58.4%	108	54.5%
Development & building approval completed & contractually committed to build	13	8.7%	18	9.1%
Land secured, waiting for building approval and/or finance approval	34	22.8%	57	28.8%
Development stalled	0	0%	0	0%
Unknown	2	1.3%	2	1.0%
TOTAL	149	100%	198	100%

Note: The 2 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2021 pipeline data for which the current development status was unknown

As can be seen in Table 22, almost two-thirds (59.6%) of SDA places in South Australia were being developed by CHPs. This differs from the distribution of providers in last year's survey, which had mainly consisted of not-for-profit housing providers. It also differs from the high representation of private housing providers in the other states above.

Table 22 - Estimated number and percentage (%) of SDA dwellings and places by provider type in South Australia

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	88	59.1%	118	59.6%
Not-for-profit housing provider	38	25.5%	42	21.2%
Private housing provider	23	15.4%	38	19.2%
Not-for-profit disability service provider	0	0%	0	0%
Private disability service provider	0	0%	0	0%
Government	0	0%	0	0%
Other	0	0%	0	0%
TOTAL	149	100%	198	100%

Tasmania

A total of 6 dwellings or 11 SDA places were in development in Tasmania, which is a notable decrease from the previous survey (47 places). To understand this drop in pipeline activity, the development status of the 47 places reported last year was further investigated. This revealed that a large proportion (36 places; 76.6%) of the previously reported places were no longer being developed as an SDA property or had been completely discontinued.

Of the places that were reported this year, almost all SDA places were accounted for by High Physical Support villas/duplexes/townhouses (8 places). This was followed by Robust villas/duplexes/townhouses (2 places) and 1 place in a High Physical Support apartment. No other building types or design categories were reported. See Table 23.

Table 23 - Estimated number of SDA places across building type and design category in Tasmania ($n = 11$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	0	1	0	0	0
Villa/Duplex/Townhouse	0	8	0	2	0
House	0	0	0	0	0
Group home	0	0	0	0	0

As seen in Table 24, almost all SDA places in Tasmania (90.9%) were currently under construction. This is again a notable change from the development statuses reported in last year's pipeline, which only consisted of places in the first stage of the development cycle (i.e. 'Land secured, waiting for building approval and/or finance approval').

Table 24 - 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
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Under construction	5	83.3%	10	90.9%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Land secured, waiting for building approval and/or finance approval	0	0%	0	0%
Development stalled	1	16.7%	1	9.1%
Unknown	0	0%	0	0%
TOTAL	6	100%	11	100%

Much like South Australia, the majority of places in development were reported by CHPs (90.9%). The only other provider that reported developing SDA dwellings in Tasmania was a private housing provider. See Table 25.

Table 25 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Tasmania

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	5	83.3%	10	90.9%
Not-for-profit housing provider	0	0%	0	0%
Private housing provider	1	16.7%	1	9.1%
Not-for-profit disability service provider	0	0%	0	0%
Private disability service provider	0	0%	0	0%
Government	0	0%	0	0%
Other	0	0%	0	0%
TOTAL	6	100%	11	100%

Australian Capital Territory

A total of 6 dwellings or 12 SDA places were reported to be in development in the Australian Capital Territory; slightly less than half compared to the previous survey (30 places). As shown in Table 26, all of these SDA places were for High Physical Support villas/duplexes/townhouses. This differs from last year's pipeline, which only consisted of High Physical Support apartments.

Table 26 - Estimated number of SDA places across building type and design category in Australian Capital Territory ($n = 12$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	0	0	0	0	0
Villa/Duplex/Townhouse	0	12	0	0	0
House	0	0	0	0	0
Group home	0	0	0	0	0

As can be seen in Table 27, all SDA places were in the earliest stage of the development cycle (i.e. having secured land and waiting for building and/or finance approval).

Table 27 - Estimated number and percentage (%) of SDA dwellings and places by development status in Australian Capital Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Under construction	0	0%	0	0%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Land secured, waiting for building approval and/or finance approval	6	100%	12	100%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
TOTAL	6	100%	12	100%

As with South Australia and Tasmania, CHPs dominated the pipeline in the Australian Capital Territory. See Table 28.

Table 28 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Australian Capital Territory

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	6	100%	12	100%
Not-for-profit housing provider	0	0%	0	0%
Private housing provider	0	0%	0	0%
Not-for-profit disability service provider	0	0%	0	0%
Private disability provider	0	0%	0	0%
Government	0	0%	0	0%
Other	0	0%	0	0%
TOTAL	6	100%	12	100%

Northern Territory

A total of 10 dwellings or 20 SDA places were reported to be in development in the Northern Territory, which is almost double compared to the previous survey (12 places).

As can be seen in Table 29, the majority (60.0%) of SDA places were High Physical Support villas/duplexes/townhouses. This is a strong increase from last year's pipeline, which did not include any High Physical Support dwellings. This was followed by an equal split between Fully Accessible houses and Robust houses, comprising 3 places each. There were also 2 places in Robust villas/duplexes/townhouses in development.

Table 29 - Estimated number of SDA places across building type and design category in Northern Territory ($n = 20$)

Building Type	Fully Accessible	High Physical Support	Improved Liveability	Robust	Other
Apartment	0	0	0	0	0
Villa/Duplex/Townhouse	0	12	0	2	0
House	3	0	0	3	0
Group home	0	0	0	0	0

As seen in Table 30, most SDA places (60.0%) in development were under construction, followed by 30.0% of places contractually committed to build and 10.0% waiting for building/finance approval.

Table 30 - Estimated number and percentage (%) of SDA dwellings and places by development status in Northern Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Under construction	6	60.0%	12	60.0%
Development & building approval completed & contractually committed to build	2	20.0%	6	30.0%
Land secured, waiting for building approval and/or finance approval	2	20.0%	2	10.0%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
TOTAL	10	100%	20	100%

As seen in Table 31, most of the SDA pipeline places in the Northern Territory were developed by private housing providers (70.0%), followed by not-for-profit disability service providers (30.0%).

Table 31 - Estimated number and percentage (%) of SDA dwellings and places by provider type in Northern Territory

Provider type	Number of dwellings	% of dwellings	Number of places	% of places
Community housing provider	0	0%	0	0%
Not-for-profit housing provider	0	0%	0	0%
Private housing provider	8	80.0%	14	70.0%
Not-for-profit disability service provider	2	20.0%	6	30.0%
Private disability provider	0	0%	0	0%
Government	0	0%	0	0%
Other	0	0%	0	0%
TOTAL	10	100%	20	100%

SDA supply pipeline: Comparisons between states and national distribution

In this section, SDA pipeline places reported in each jurisdiction of Australia (i.e. state pipelines) are shown relative to the total (i.e. national) pipeline development. The state and national pipelines are compared by building type and design category.

Note that these figures do not represent all SDA development activity, as it is likely that not all providers who have SDA developments in progress responded to the survey.

New South Wales

Figure 27 shows a comparison of the percentage of SDA places in development in New South Wales ($n = 539$) versus those in development in all states and territories (i.e. the national pipeline; $n = 2,304$) for each design category. Figure 28 shows the same comparison for building types.

As can be seen, the proportions of the different design categories and building types in New South Wales were largely similar to national proportions (i.e. proportions across all states and territories combined). However, New South Wales had proportionally fewer SDA places with High Physical Support design compared to the national pipeline (50.1% of places in New South Wales versus 64.2% of all places in Australia).



Figure 27 - Proportion of SDA places by design category: A comparison between New South Wales ($n = 539$) and Australia ($n = 2,304$)

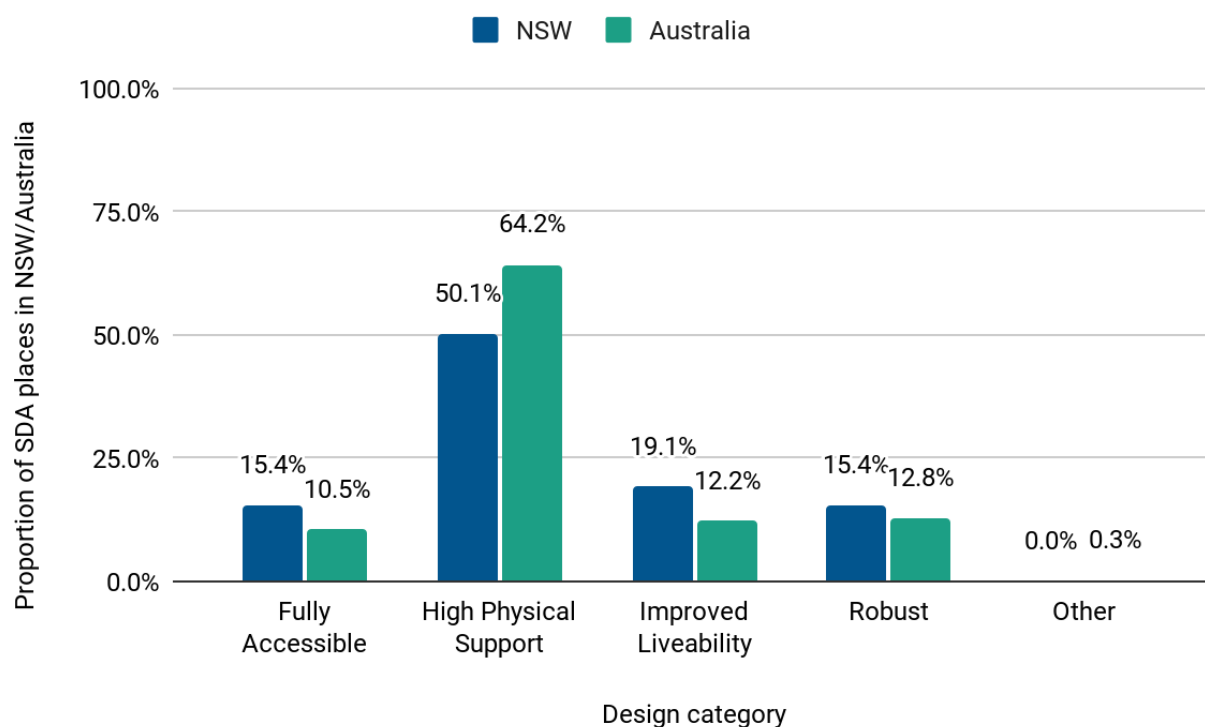
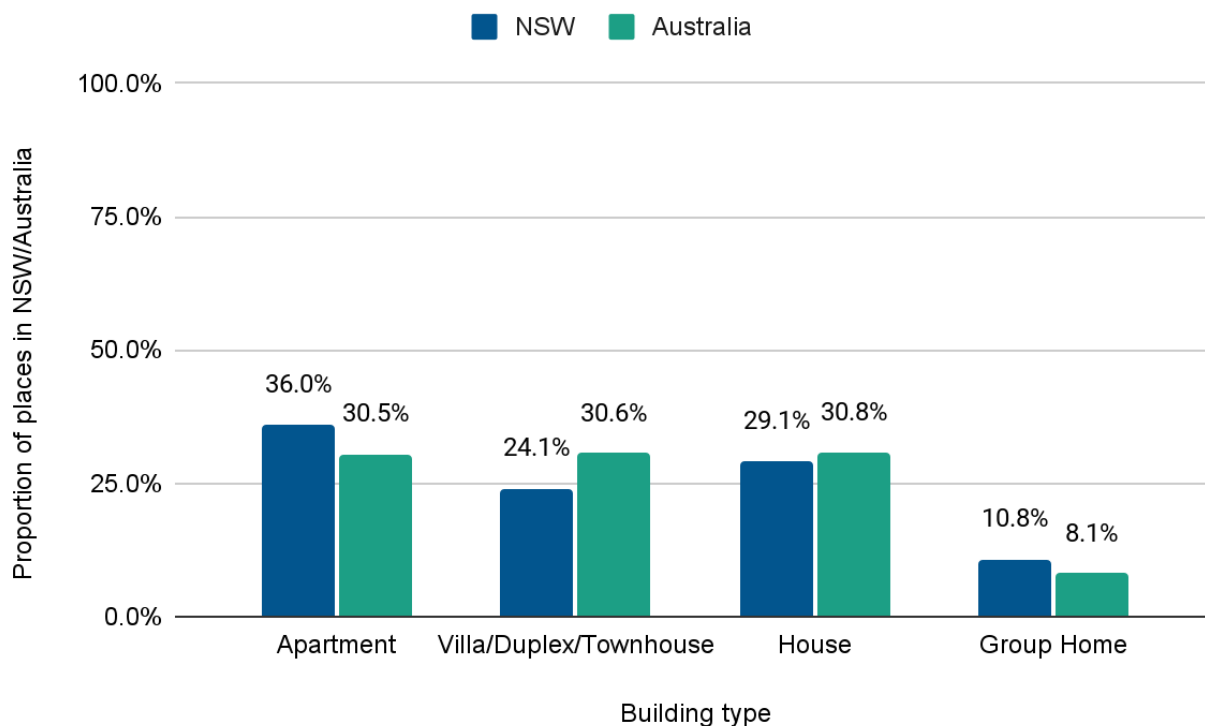


Figure 28 - Proportion of SDA places by building type: A comparison between New South Wales ($n = 539$) and Australia ($n = 2,304$)



Victoria

Figure 29 shows a comparison of the percentage of SDA places in development in Victoria ($n = 694$) versus those in development in the national pipeline ($n = 2,304$) for each design category. Figure 30 shows the same comparison for building types.

As can be seen, the proportions of the different design categories and building types in development in Victoria were largely similar to national figures.



Figure 29 - Proportion of SDA places by design category: A comparison between Victoria ($n = 694$) and Australia ($n = 2,304$)

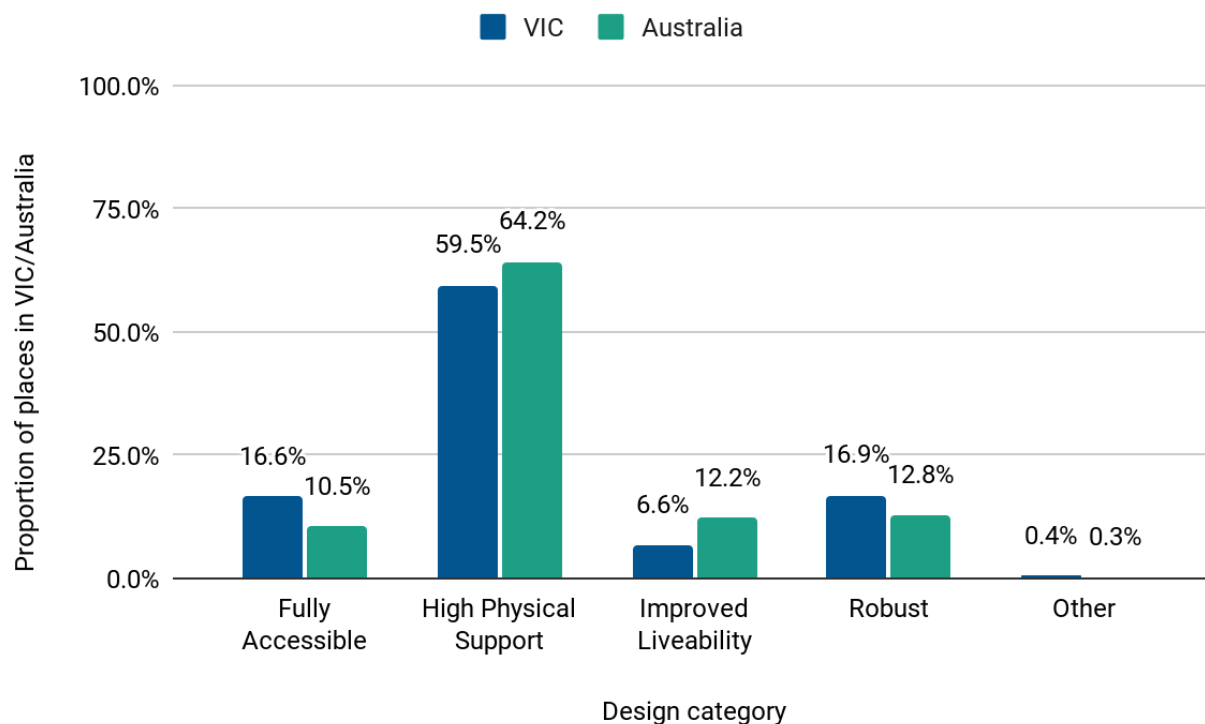
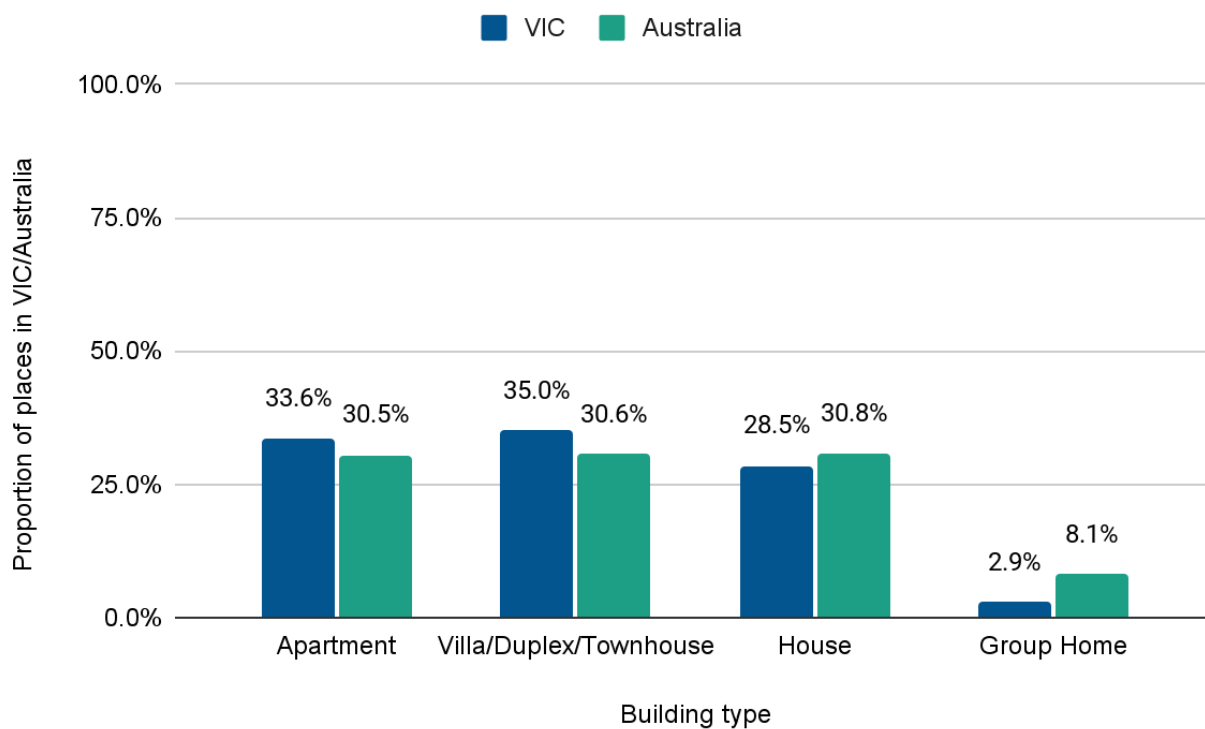


Figure 30 - Proportion of SDA places by building type: A comparison between Victoria ($n = 694$) and Australia ($n = 2,304$)



Queensland

Relative to national proportions, Queensland had a larger proportion of SDA places with High Physical Support design and, conversely, a smaller proportion of places with Fully Accessible and Improved Livability design in the pipeline. See Figure 31.

In terms of building types, the proportion of places for houses in Queensland was larger compared to the nationwide proportion of houses, while the proportion of places in villas/duplexes/townhouses was smaller. See Figure 32.

Figure 31 - Proportion of SDA places by design category: A comparison between Queensland (*n* = 424) and Australia (*n* = 2,304)

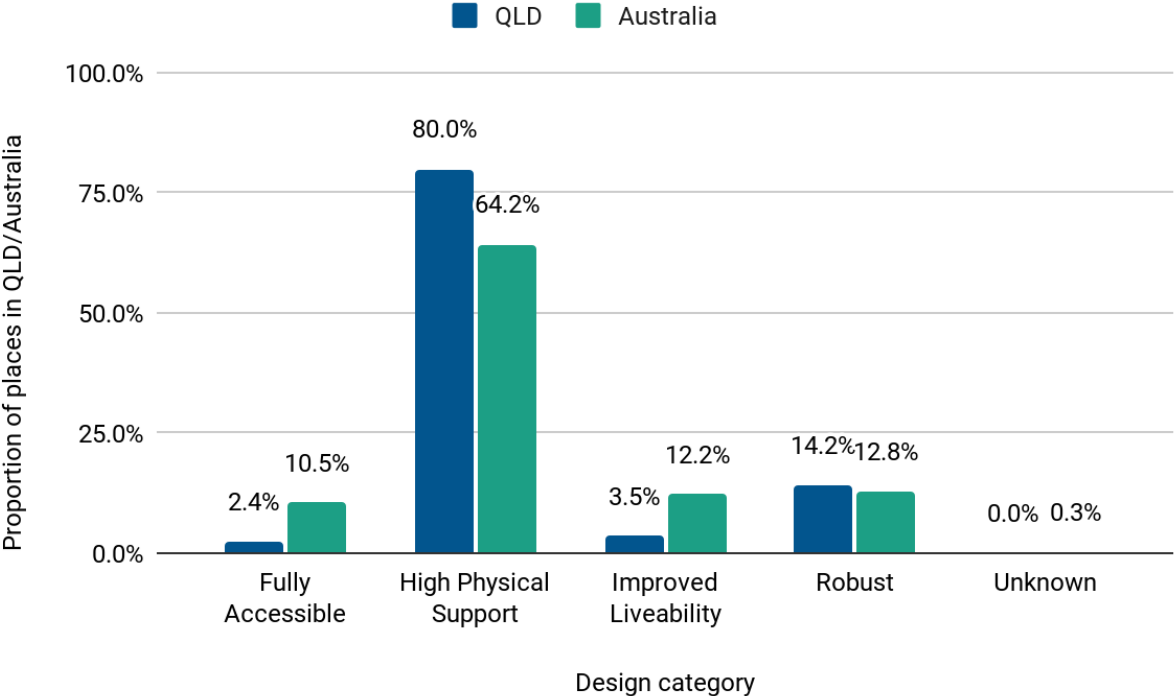
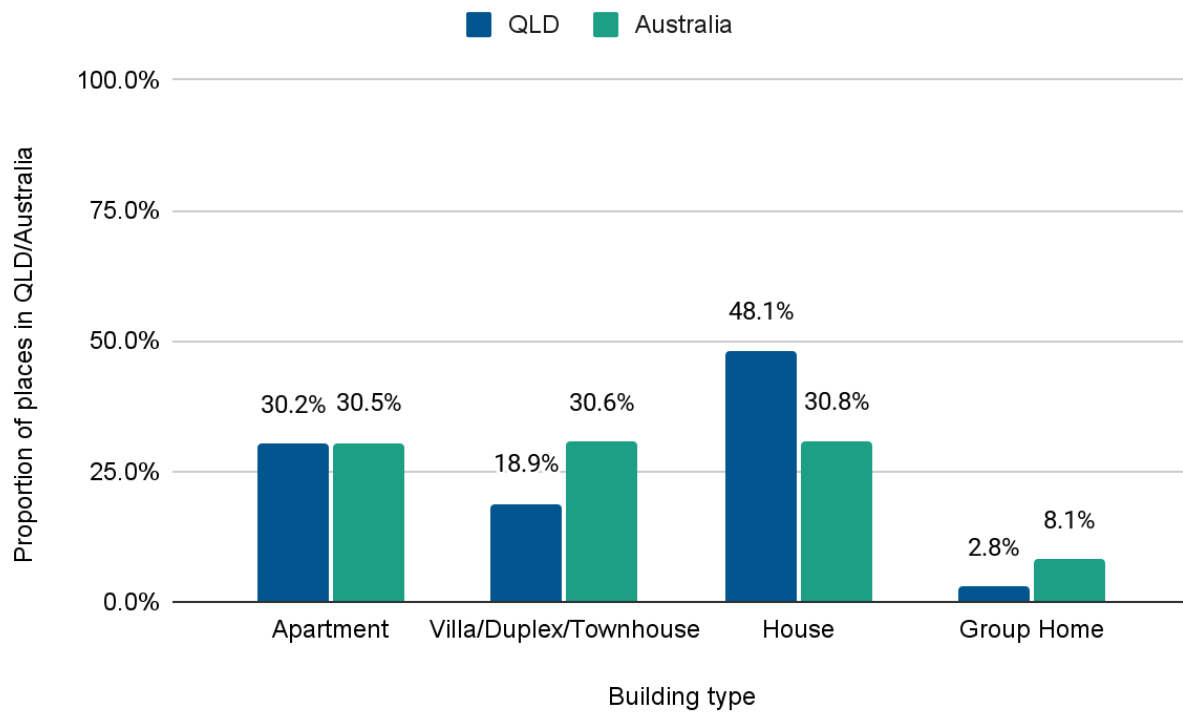


Figure 32 - Proportion of SDA places by building type: A comparison between Queensland (n = 424) and Australia (n = 2,304)



Western Australia

As can be seen in Figure 33, the proportion of High Physical Support places in development in Western Australia was slightly larger than the nationwide proportion of this design category. The proportion of places in group homes in Western Australia was also slightly larger than in the national pipeline, while the proportion of places in apartments was smaller. See Figure 34.

Figure 33 - Proportion of SDA places by design category: A comparison between Western Australia (*n* = 406) and Australia (*n* = 2,304)

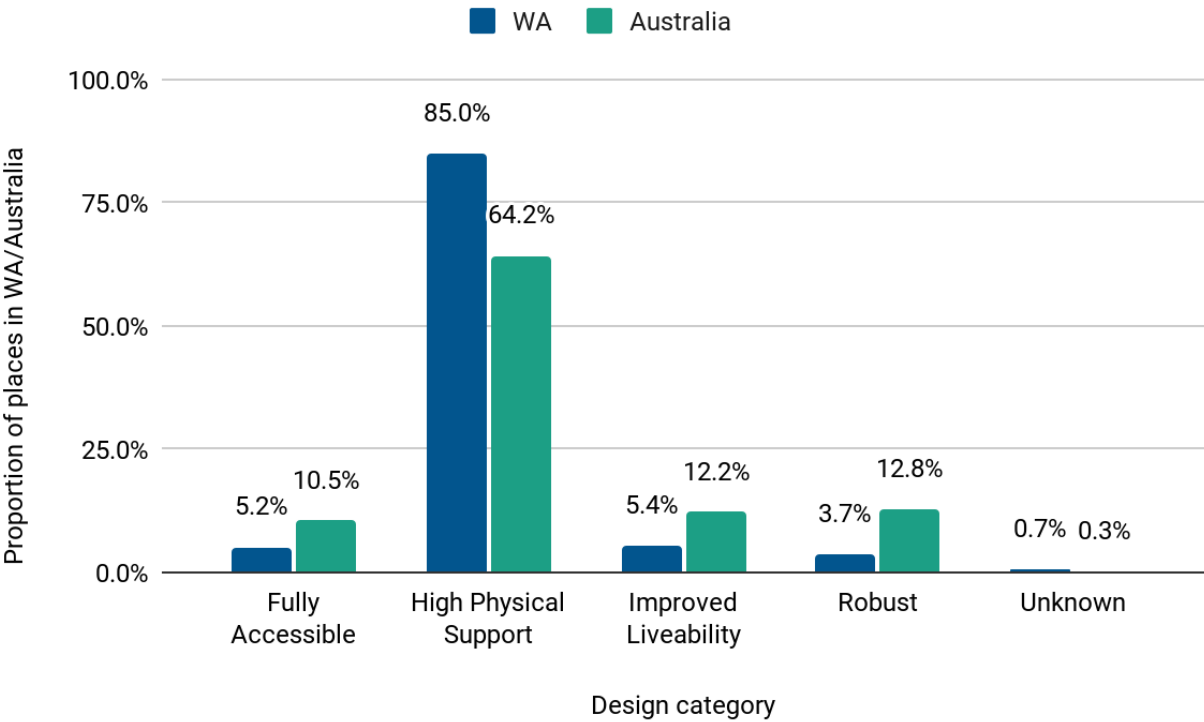
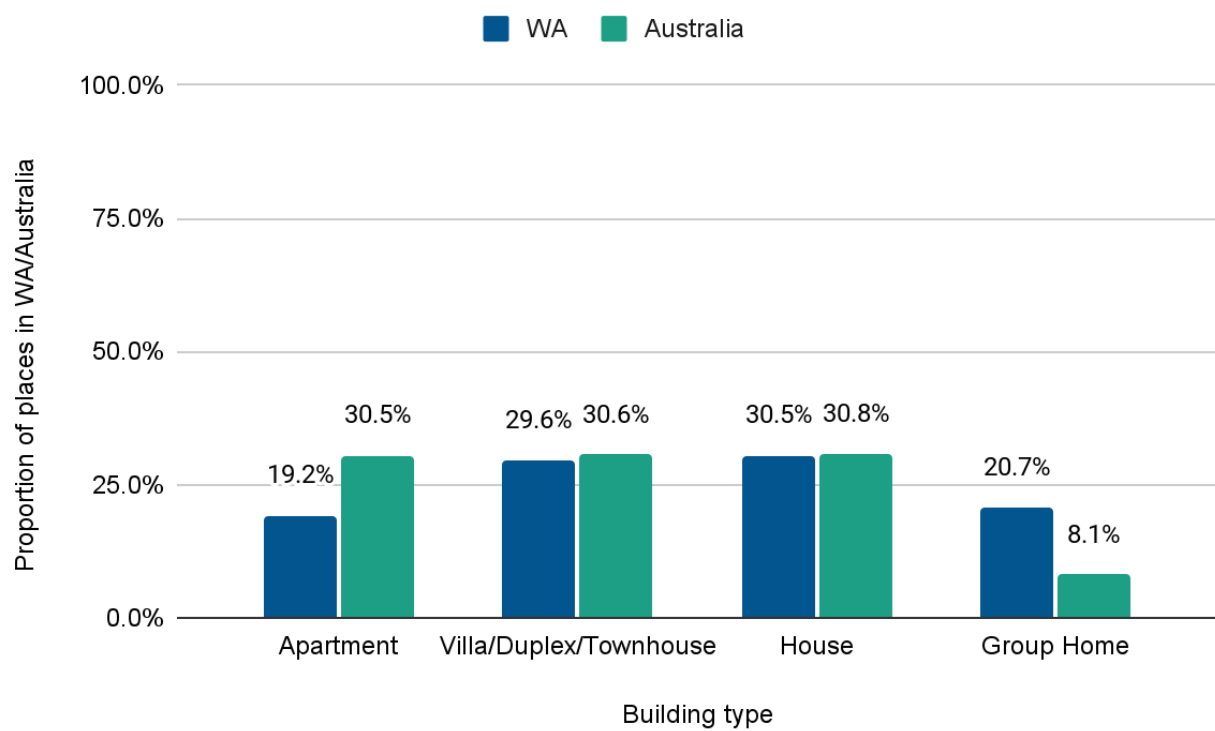


Figure 34 - Proportion of SDA places by building type: A comparison between Western Australia ($n = 406$) and Australia ($n = 2,304$)



South Australia

Relative to the national pipeline development trends, South Australia had a smaller proportion of High Physical Support places and a larger proportion of Improved Liveability places. See Figure 35.

In terms of building types, villas/duplexes/townhouses were proportionally more commonly represented in the pipeline in South Australia than in the national pipeline, while houses were less commonly represented. See Figure 36.

Figure 35 - Proportion of SDA places by design category: A comparison between South Australia (*n* = 198) and Australia (*n* = 2,304)

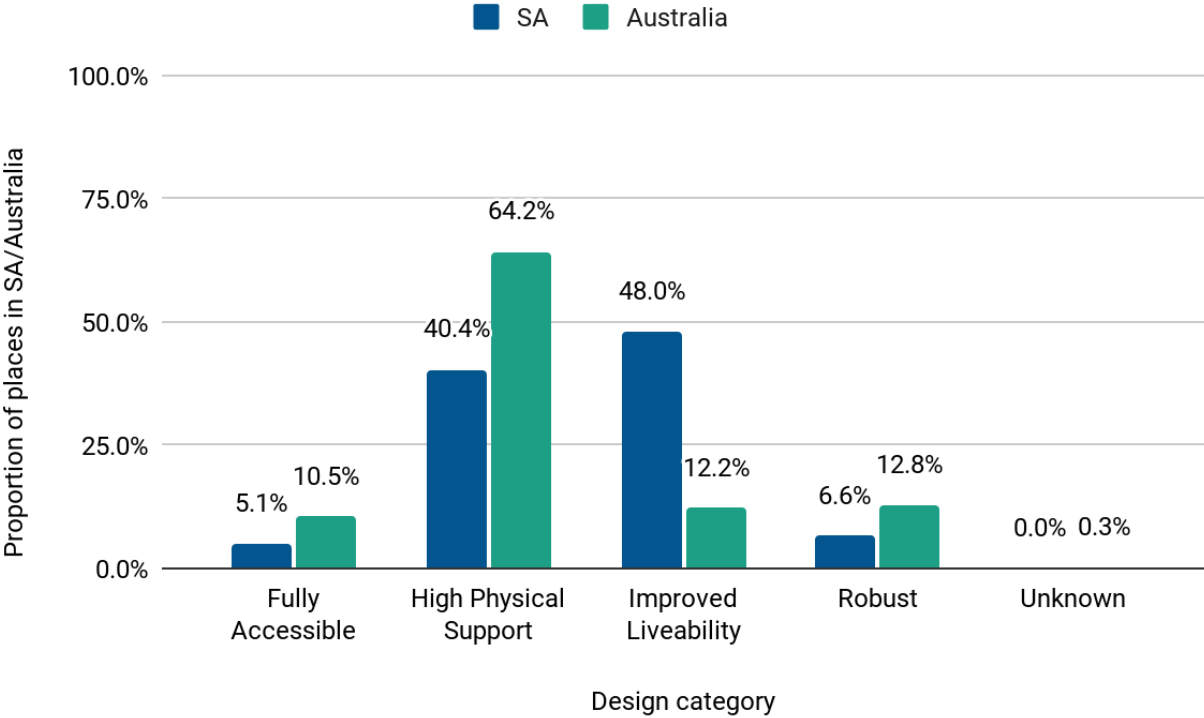
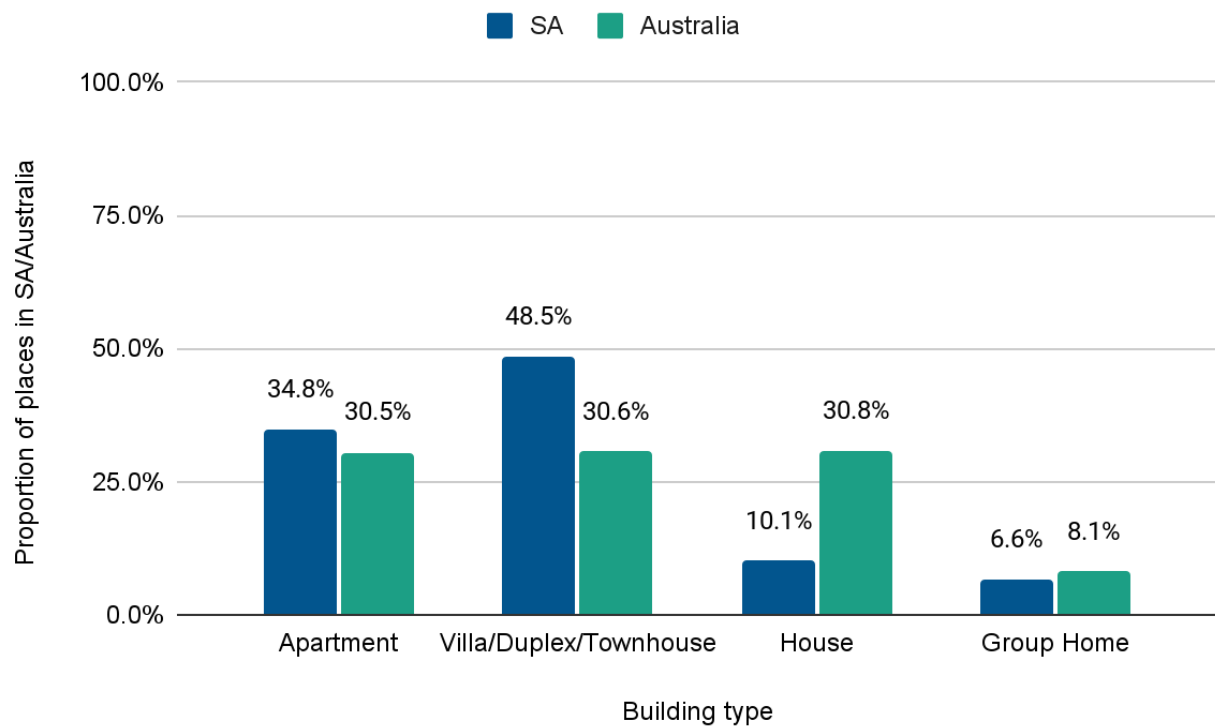


Figure 36 - Proportion of SDA places by building type: A comparison between South Australia ($n = 198$) and Australia ($n = 2,304$)



Tasmania

Compared to nationwide trends, pipeline dwellings in Tasmania were less distributed across the different design categories, with a larger proportion of places having High Physical Support and Robust design. See Figure 37.

Similarly, almost all pipeline places in Tasmania were for villas/duplexes/townhouses, making this building type proportionally more represented in Tasmania than in the national pipeline. See Figure 38.

Figure 37 - Proportion of SDA places by design category: A comparison between Tasmania ($n = 11$) and Australia ($n = 2,304$)

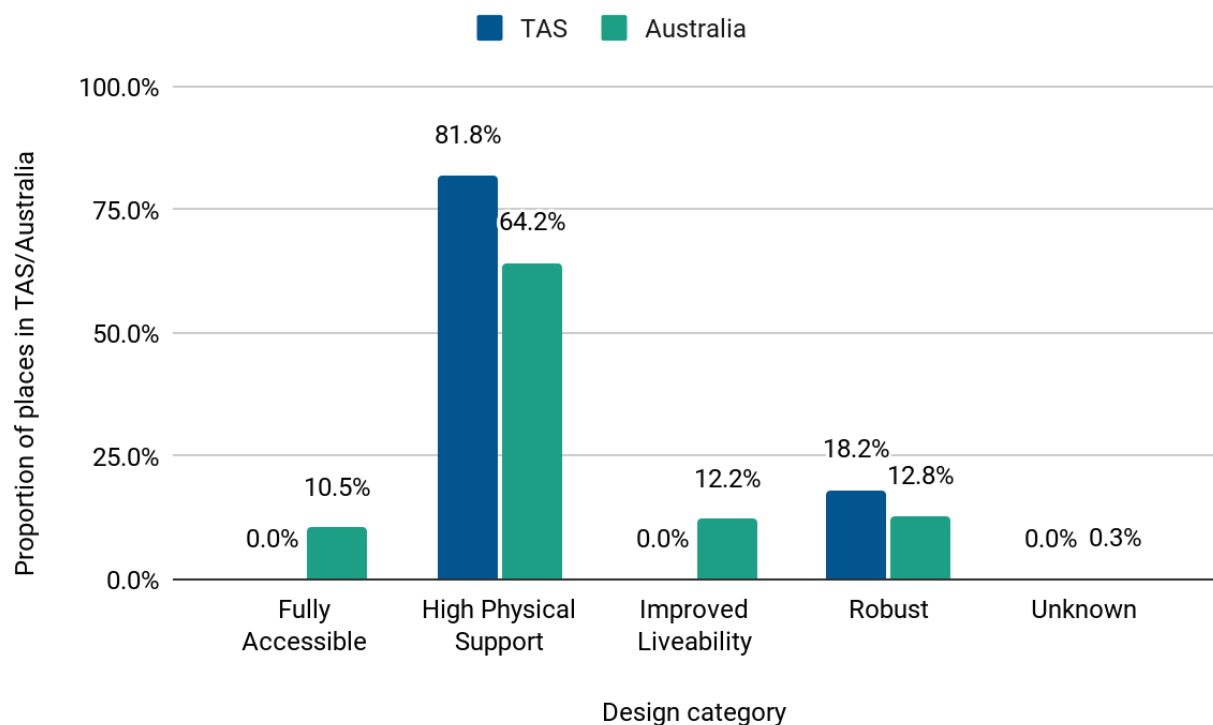
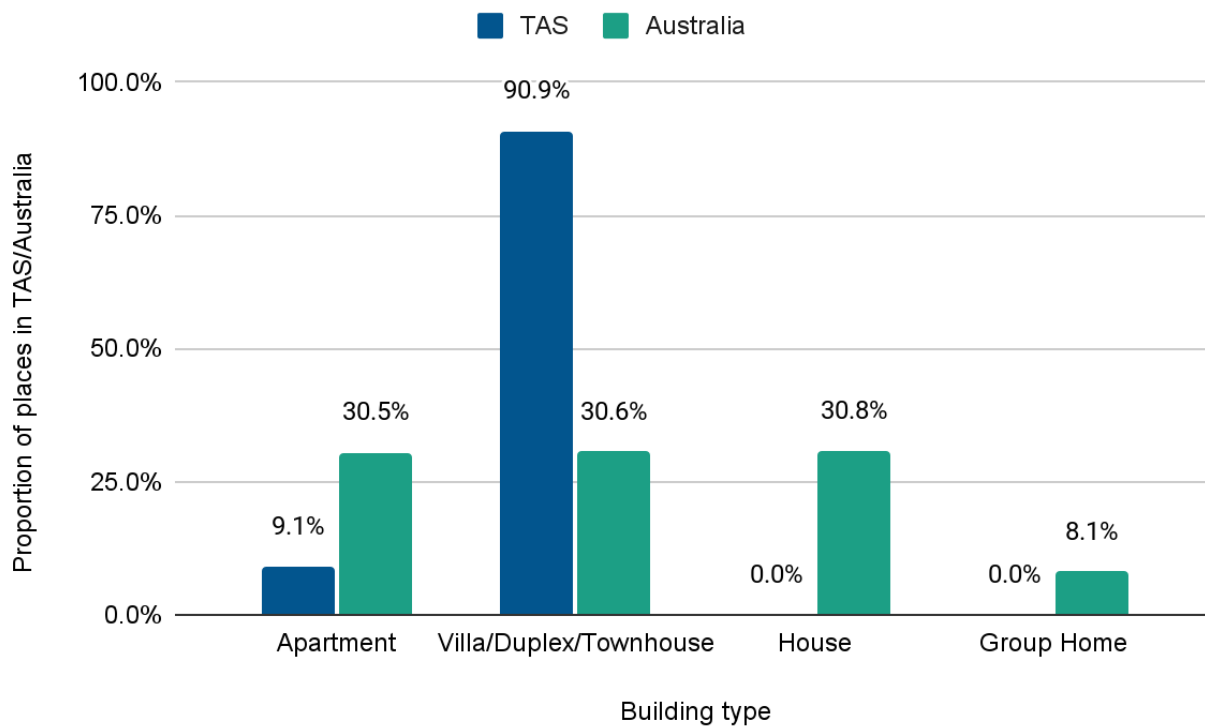


Figure 38 - Proportion of SDA places by building type: A comparison between Tasmania ($n = 11$) and Australia ($n = 2,304$)



Australian Capital Territory

Given that the Australian Capital Territory only had developments for High Physical Support villas/duplexes/townhouses, the proportion of building types and design categories in this jurisdiction differed strongly from nationwide proportions. See Figures 39 and 40.

Figure 39 - Proportion of SDA places by design category: A comparison between Australian Capital Territory ($n = 12$) and Australia ($n = 2,304$)

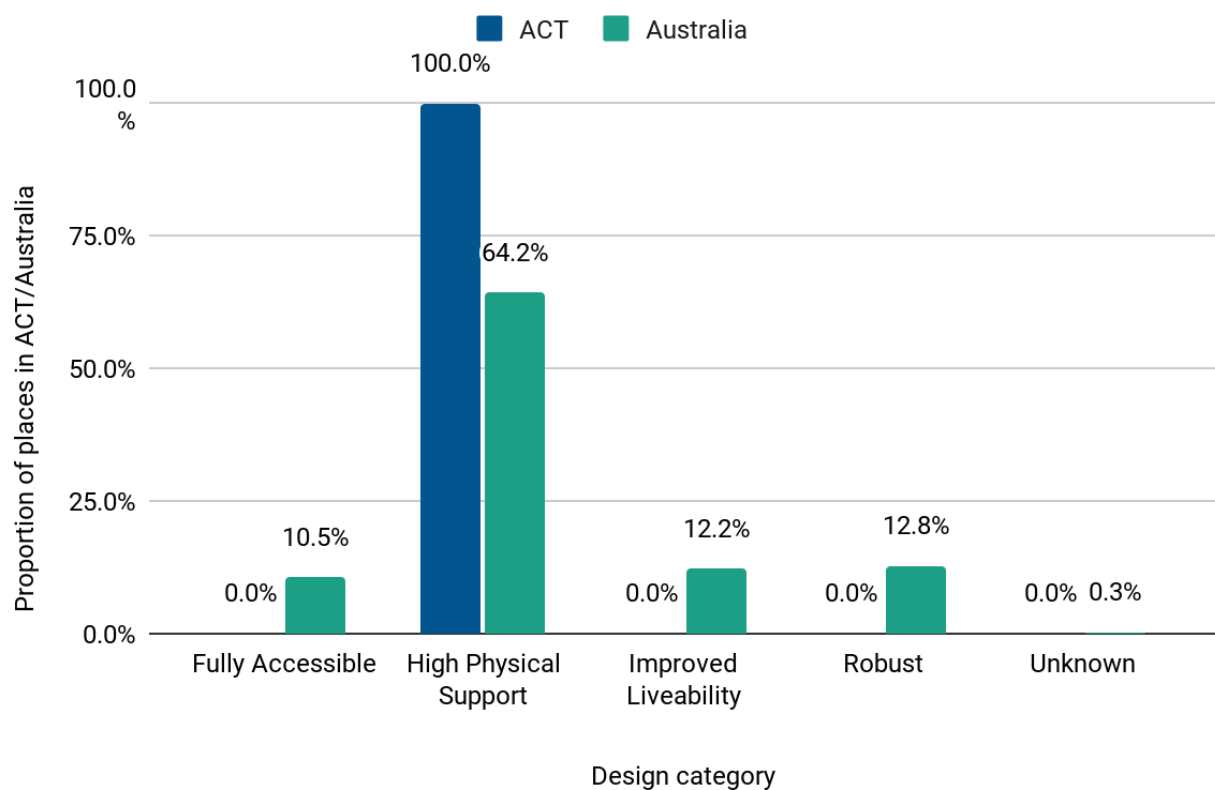
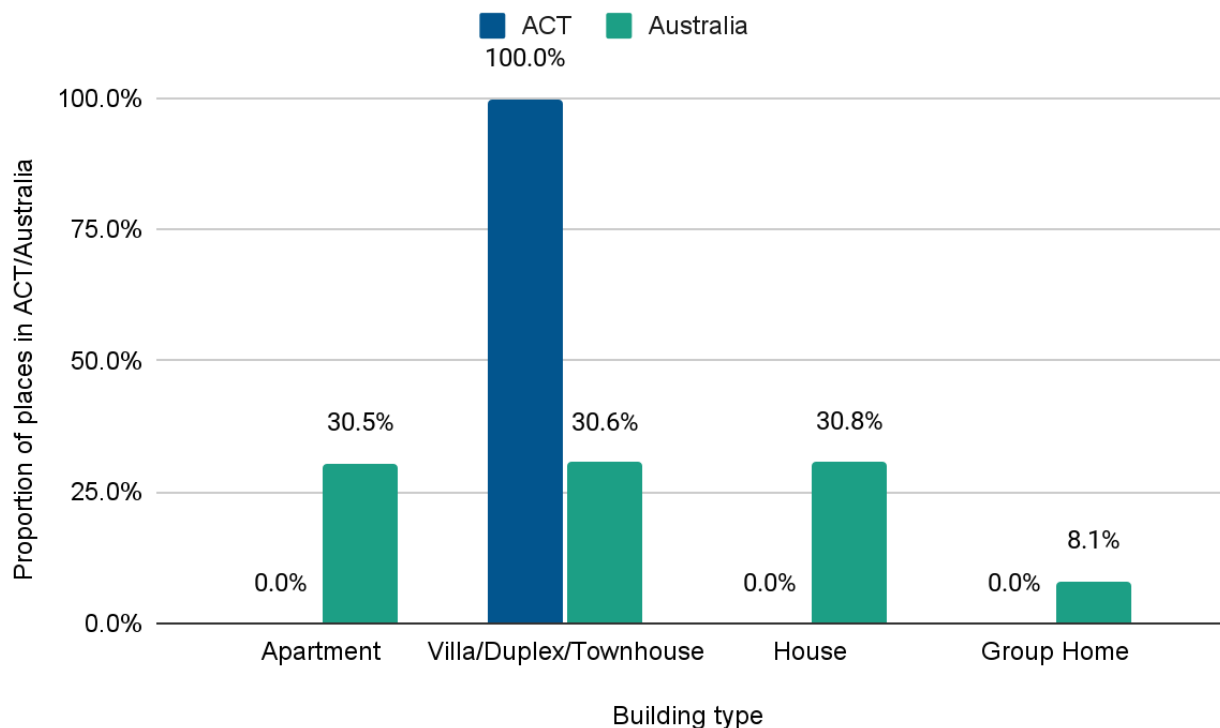


Figure 40 - Proportion of SDA places by building type: A comparison between Australian Capital Territory ($n = 12$) and Australia ($n = 2,304$)



Northern Territory

Proportionally, the Northern Territory had fewer pipeline places in the Improved Liveability design category and more places with Robust design than the national pipeline. In terms of building types, the Northern Territory had more places in villas/duplexes/townhouses but fewer places in apartments and group homes. See Figures 41 and 42.

Figure 41 - Proportion of SDA places by design category: A comparison between Northern Territory ($n = 20$) and Australia ($n = 2,304$)

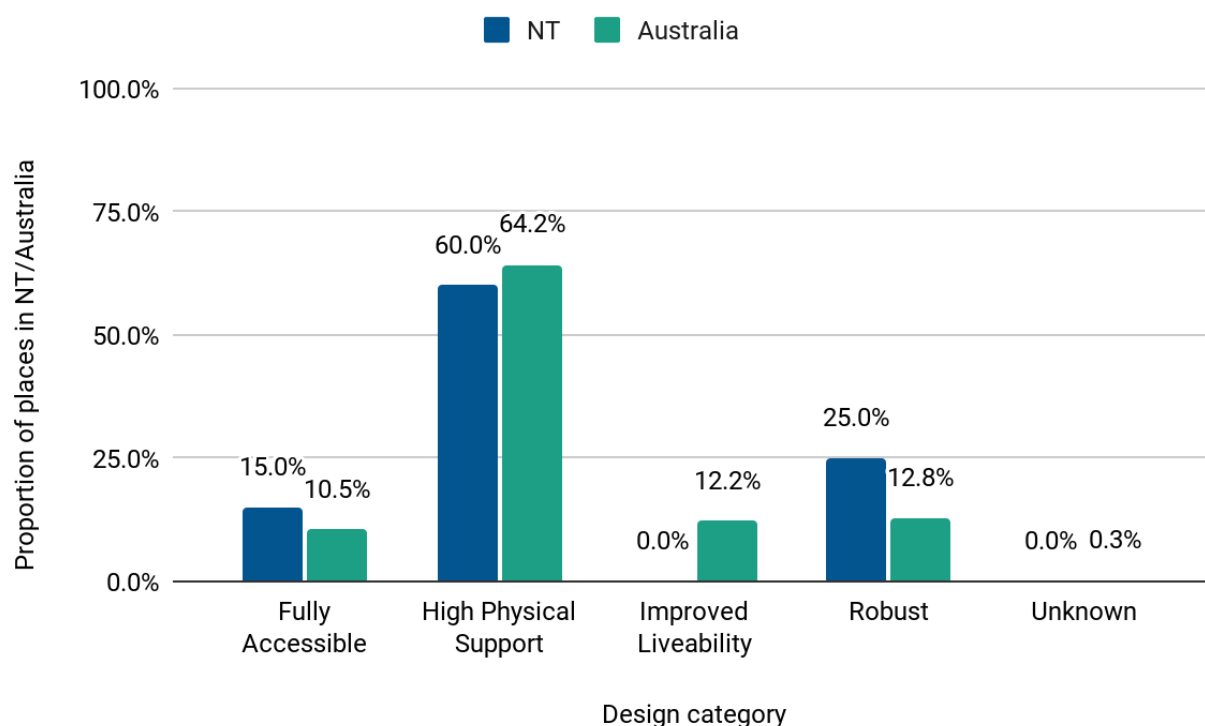
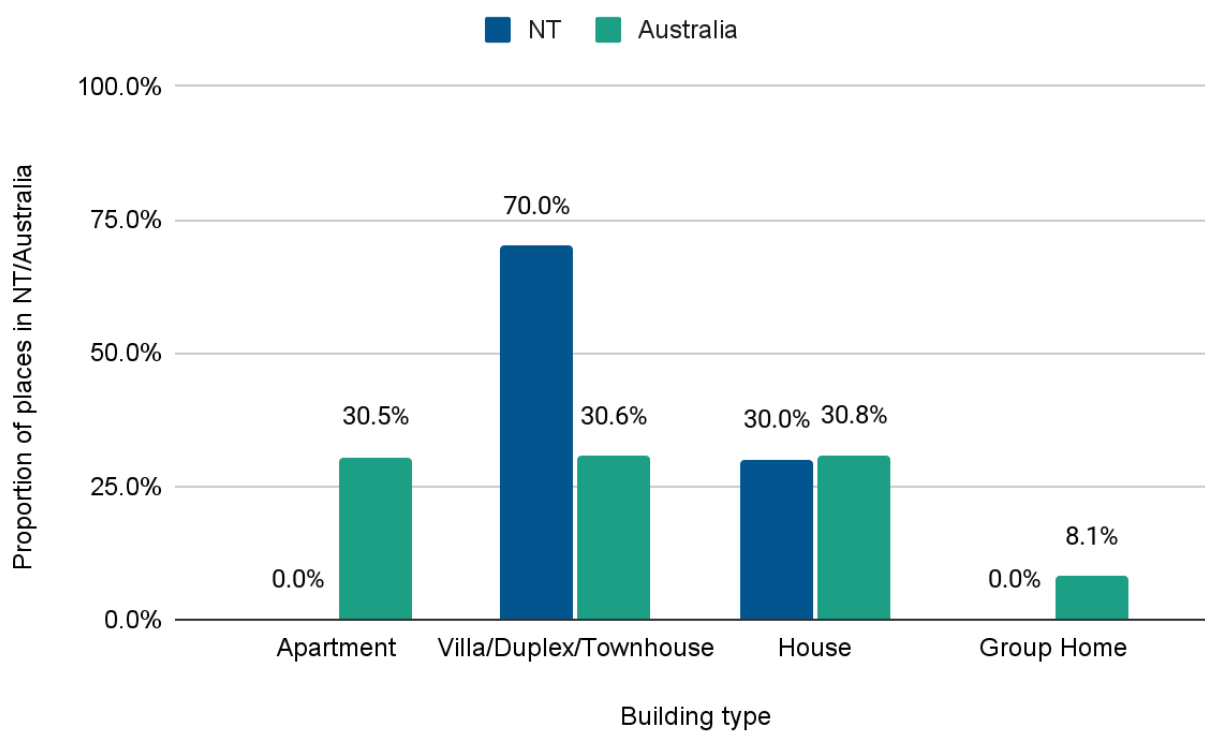


Figure 42 - Proportion of SDA places by building type: A comparison between Northern Territory ($n = 20$) and Australia ($n = 2,304$)



SA4 regions and NDIA data

This section presents the pipeline data (number of SDA dwellings and places) at the SA4 level for each jurisdiction.³⁸ It also combines this data with what is reported by the NDIA as enrolled dwellings for each SA4 region and, therefore, provides a comprehensive summary of SDA supply in Australia.

In total, there are 87 SA4 regions across Australia, for which 75 regions had SDA pipeline data reported in this survey. Data from the NDIA was taken from the latest quarterly report, showing the number of enrolled and in-kind dwellings and places as of 30 June 2022.³⁹ In-kind SDA dwellings are properties that are owned by a state government and tenanted by NDIS participants in that state. The NDIA data from the latest quarter (i.e. 30 June 2022) shows that there are in-kind properties only in Tasmania.

The below estimates are shown for both the number of dwellings and places. Please note that the number of places in enrolled and in-kind dwellings could only be estimated. This is because the NDIA does not report the exact number of places for Legacy stock, and instead reports these dwellings as having 6+ places. For the purpose of this report, these dwellings were counted as having 6 places. Therefore, the estimated number of places in the below sections represents the *minimum* supply and needs to be interpreted with caution.

NDIA notification status

From 1 July 2021, it became mandatory for SDA providers or future SDA providers to inform the NDIA at the design stage of any proposed SDA dwellings. The NDIA reports this number of unenrolled (i.e. pipeline) SDA dwellings in their quarterly reports, with the latest report indicating 3,085 unenrolled dwellings as of 30 June 2022.⁴⁰

To assess the extent to which the dwellings reported in this survey overlap with the unenrolled dwellings reported by the NDIA, the survey asked providers to indicate whether they had notified the NDIA about their pipeline dwellings. This information was available for a total of 1,023 out of all 1,522 dwellings reported in this survey. Providers indicated that the NDIA has been notified about approximately half of the 1,023 dwellings (515 dwellings; 50.3%), while 43.7% (447 dwellings) of the dwellings had not yet been reported. Providers were unsure about the notification status of a small proportion of their pipeline dwellings (6%). See Figure 43.

Please note that to avoid duplication, the unenrolled dwellings reported by the NDIA are not included in any of the below sections. Instead, the below sections only show the

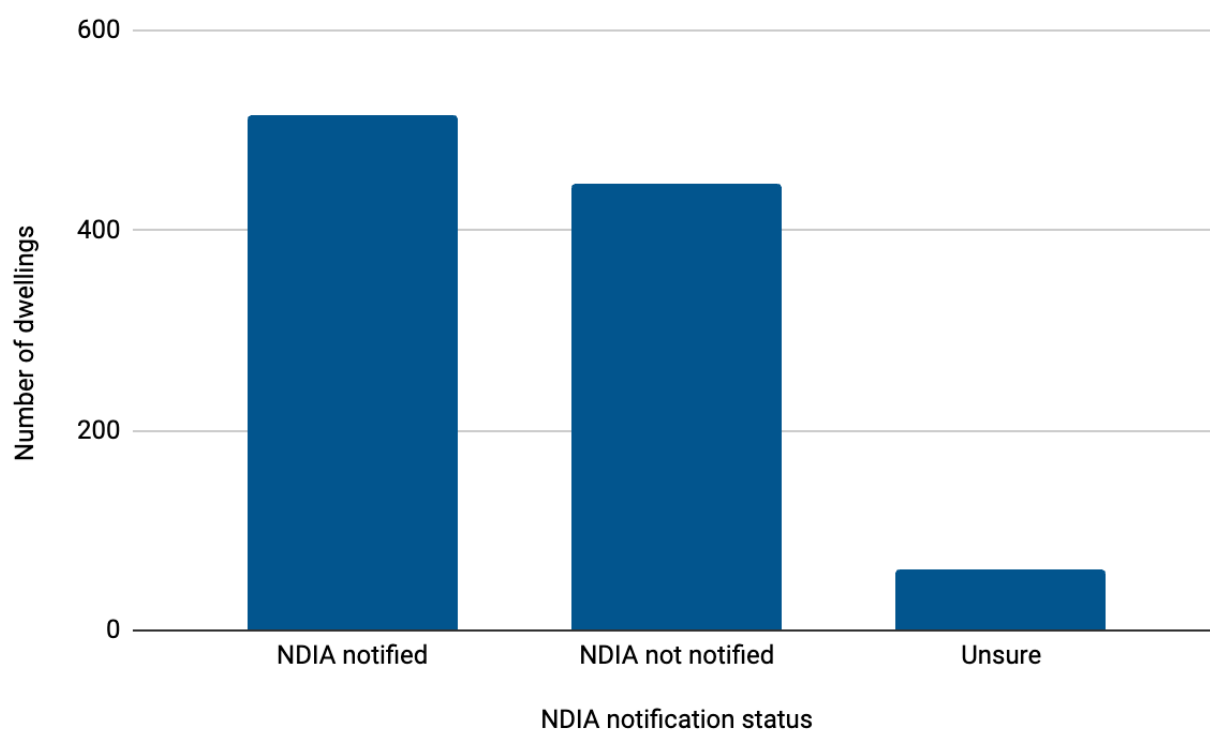
³⁸ See Australian Bureau of Statistics (ABS, 2016) for more information on Statistical Area Level 4 (SA4)

³⁹ NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Downloaded 11 August 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

⁴⁰ NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Table P10. Downloaded 29 September 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

pipeline dwellings reported in this survey, alongside enrolled and in-kind enrolled SDA dwellings.

Figure 43 - NDIA notification status ($n = 1,023$)



New South Wales

Table 32 shows the number of dwellings and places in the different SA4 regions in New South Wales. These numbers are also visualised in Figure 44 (number of dwellings) and Figure 45 (number of places).

As seen in Table 32, the SA4 region with the greatest number of pipeline dwellings was 'Sydney - Parramatta' (58 dwellings), followed by 'Sydney - Outer West and Blue Mountains' (33 dwellings). The following SA4s had no pipeline dwellings: 'Capital Region', 'Riverina', and 'Southern Highlands and Shoalhaven'.

When combining the total number of enrolled and pipeline dwellings, the SA4 region with the highest SDA supply was again 'Sydney - Parramatta' (323 dwellings), followed by 'Sydney - Outer West and Blue Mountains' (245 dwellings), and 'Newcastle and Lake Macquarie' (204 dwellings).

Interestingly, 'Sydney - Outer West and Blue Mountains' had slightly more forecasted SDA *places* (653 places) than 'Sydney - Parramatta' (650 places), despite having fewer SDA dwellings. This may suggest that the dwellings in 'Sydney - Outer West and Blue Mountains' tend to accommodate more tenants (i.e. there are more places per dwelling).



Table 32 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in New South Wales (NSW)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Capital Region	74	0	0	74	189	0	0	189
Central Coast	127	0	11	138	366	0	20	386
Central West	66	0	2	68	258	0	6	264
Coffs Harbour - Grafton	30	0	11	41	106	0	15	121
Far West and Orana	57	0	12	69	176	0	12	188
Hunter Valley exc Newcastle	58	0	2	60	195	0	4	199
Illawarra	73	0	4	77	241	0	4	245
Mid North Coast	57	0	6	63	158	0	18	176
Murray	75	0	9	84	189	0	13	202
New England and North West	46	0	24	70	166	0	25	191
Newcastle and Lake Macquarie	197	0	7	204	508	0	21	529
Richmond - Tweed	64	0	23	87	188	0	38	226
Riverina	44	0	0	44	138	0	0	138
Southern Highlands and Shoalhaven	39	0	0	39	128	0	0	128
Sydney - Baulkham Hills and Hawkesbury	107	0	17	124	358	0	18	376
Sydney - Blacktown	121	0	23	144	415	0	24	439
Sydney - City and Inner South	41	0	5	46	118	0	9	127
Sydney - Eastern Suburbs	13	0	3	16	56	0	5	61
Sydney - Inner South West	142	0	22	164	414	0	26	440
Sydney - Inner West	20	0	6	26	87	0	10	97

Sydney - North Sydney and Hornsby	58	0	9	67	189	0	13	202
Sydney - Northern Beaches	65	0	11	76	236	0	18	254
Sydney - Outer South West	71	0	30	101	229	0	45	274
Sydney - Outer West and Blue Mountains	212	0	33	245	572	0	81	653
Sydney - Parramatta	265	0	58	323	576	0	74	650
Sydney - Ryde	129	0	2	131	337	0	5	342
Sydney - South West	97	0	19	116	251	0	22	273
Sydney - Sutherland	99	0	9	108	271	0	13	284
Total	2,447	0	358	2,805	7,115	0	539	7,654

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

Figure 44 - Estimated SDA dwellings in New South Wales (NSW)

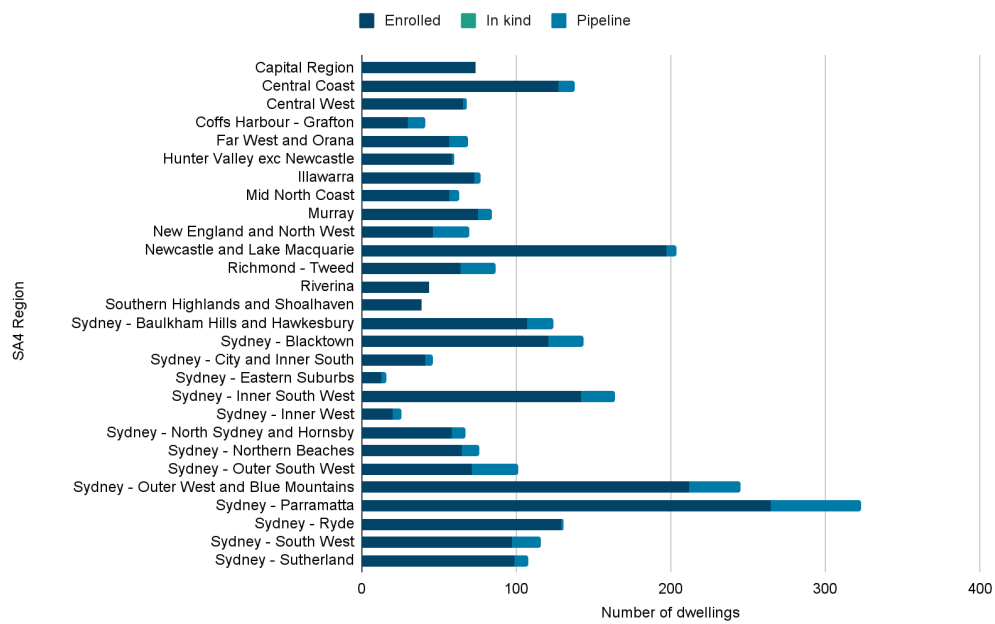
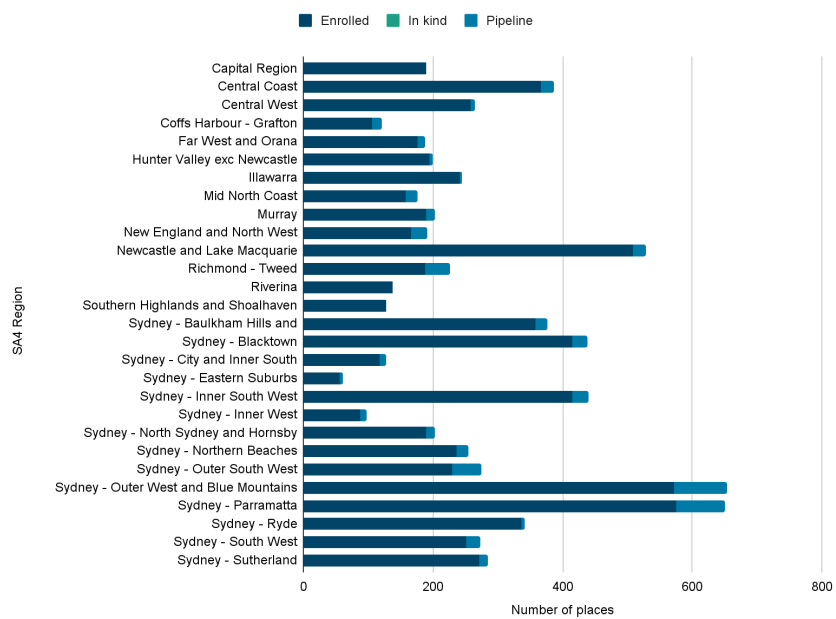


Figure 45 - Estimated SDA places in New South Wales (NSW)



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

As seen in Table 33, the SA4 region with the greatest number of pipeline dwellings was 'Melbourne - Inner' (84 dwellings), closely followed by 'Geelong' (74 dwellings) and 'Melbourne - West' (64 dwellings). 'Hume' and 'North West' had no pipeline developments.

When combining the total number of enrolled and pipeline dwellings, the SA4 regions with the highest forecast SDA supply were 'Melbourne - North East' (261 dwellings), followed by 'Melbourne - Inner' (229 dwellings), and 'Melbourne - West' (221 dwellings). See Figures 46 and 47 for a visualisation of the forecast supply in Victoria.



Table 33 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Victoria (VIC)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Ballarat	95	0	51	146	235	0	77	312
Bendigo	67	0	15	82	173	0	25	198
Geelong	103	0	74	177	290	0	96	386
Hume	55	0	0	55	177	0	0	177
Latrobe - Gippsland	79	0	17	96	246	0	37	283
Melbourne - Inner	145	0	84	229	282	0	85	367
Melbourne - Inner East	101	0	27	128	441	0	30	471
Melbourne - Inner South	151	0	46	197	510	0	50	560
Melbourne - North East	210	0	51	261	738	0	93	831
Melbourne - North West	59	0	4	63	240	0	4	244
Melbourne - Outer East	179	0	8	187	635	0	10	645
Melbourne - South East	184	0	25	209	633	0	47	680
Melbourne - West	157	0	64	221	501	0	83	584
Mornington Peninsula	85	0	2	87	304	0	5	309
North West	97	0	0	97	336	0	0	336
Shepparton	39	0	15	54	147	0	22	169
Warrnambool and South West	55	0	14	69	208	0	30	238
Total	1,861	0	497	2,358	6,096	0	694	6,790

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

Figure 46 - Estimated SDA dwellings in Victoria (VIC)

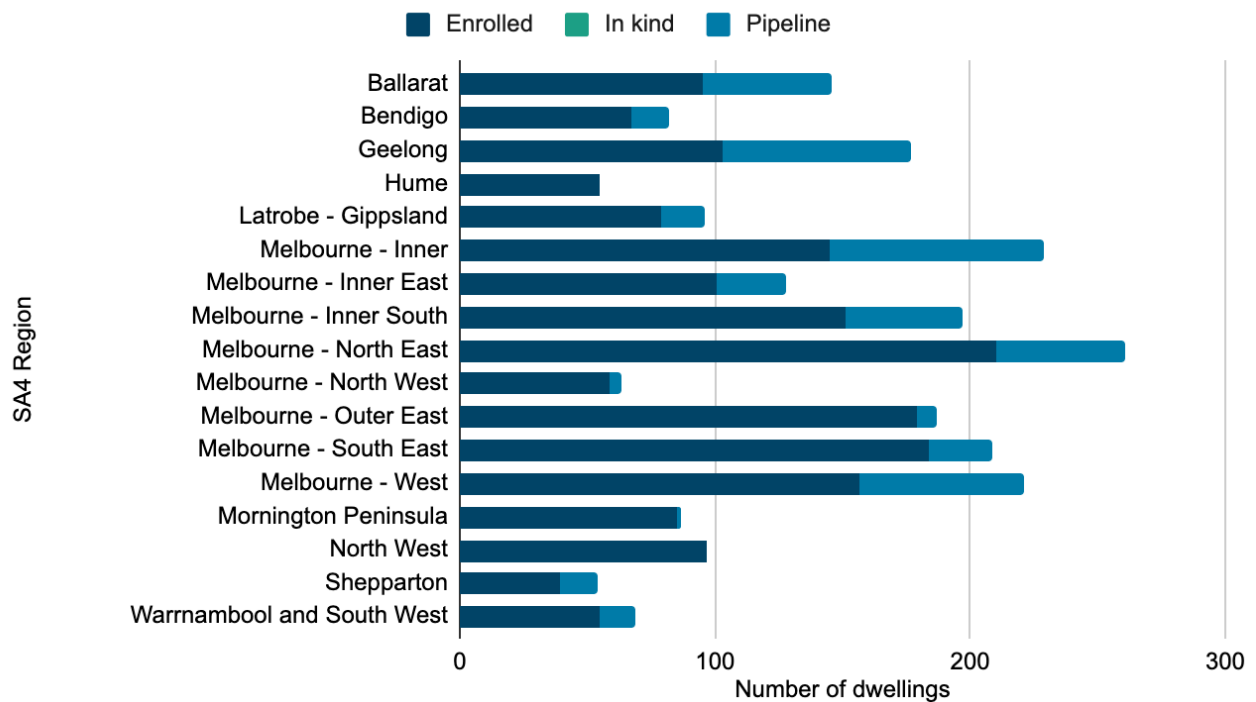
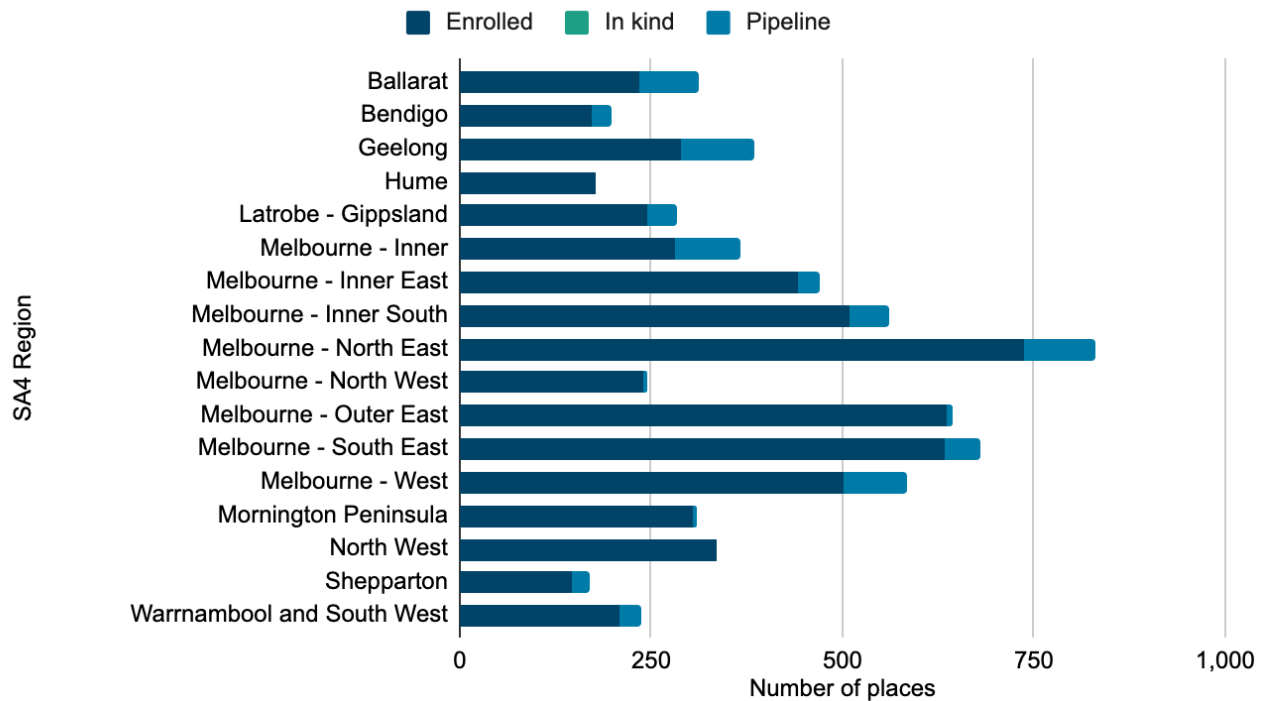


Figure 47 - Estimated SDA places in Victoria (VIC)



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

As seen in Table 34, the SA4 region with the greatest number of pipeline dwellings was 'Logan - Beaudesert' (41 dwellings), closely followed by 'Gold Coast' (38 dwellings) and 'Brisbane - East' (32 dwellings). No pipeline dwellings were reported for the SA4 regions 'Queensland - Outback' and 'Mackay'. 'Queensland - Outback' was also the only region that did not have any enrolled SDA dwellings, indicating an overall lack of SDA in this region.

The SA4 region with the highest estimated total SDA supply was 'Gold Coast' (201 enrolled and pipeline dwellings). This was followed with some distance by 'Ipswich' (149 dwellings), and 'Logan - Beaudesert' (145 dwellings). See Figure 48 for a visualisation of the estimated supply of SDA dwellings.

Interestingly, when looking at the number of estimated SDA places, 3 SA4 regions (i.e. 'Ipswich', 'Logan - Beaudesert', and 'Wide Bay') had almost the same forecast supply as the SA4 region 'Gold Coast', even though they had a lower number of estimated dwellings. This suggests that the SDA dwellings in these regions may be built for more SDA tenants (i.e. they have more places) than the dwellings on the Gold Coast. See Figure 49 for a visualisation of the estimated supply of SDA places.



Table 34 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Queensland (QLD)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Brisbane - East	34	0	32	66	70	0	54	124
Brisbane - North	47	0	15	62	97	0	23	120
Brisbane - South	54	0	17	71	99	0	26	125
Brisbane - West	54	0	4	58	102	0	4	106
Brisbane Inner City	45	0	10	55	52	0	10	62
Cairns	47	0	3	50	95	0	3	98
Darling Downs - Maranoa	8	0	1	9	25	0	2	27
Fitzroy	33	0	6	39	87	0	6	93
Gold Coast	163	0	38	201	250	0	60	310
Ipswich	130	0	19	149	267	0	43	310
Logan - Beaudesert	104	0	41	145	232	0	72	304
Mackay	10	0	0	10	37	0	0	37
Moreton Bay - North	84	0	20	104	207	0	33	240
Moreton Bay - South	52	0	4	56	111	0	9	120
Queensland - Outback	0	0	0	0	0	0	0	0
Sunshine Coast	75	0	15	90	149	0	21	170
Toowoomba	60	0	8	68	150	0	14	164
Townsville	47	0	17	64	136	0	21	157
Wide Bay	115	0	15	130	268	0	23	291
Total	1,162	0	265	1,427	2,434	0	424	2,858

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.



Figure 48 - Estimated SDA dwellings in Queensland (QLD)

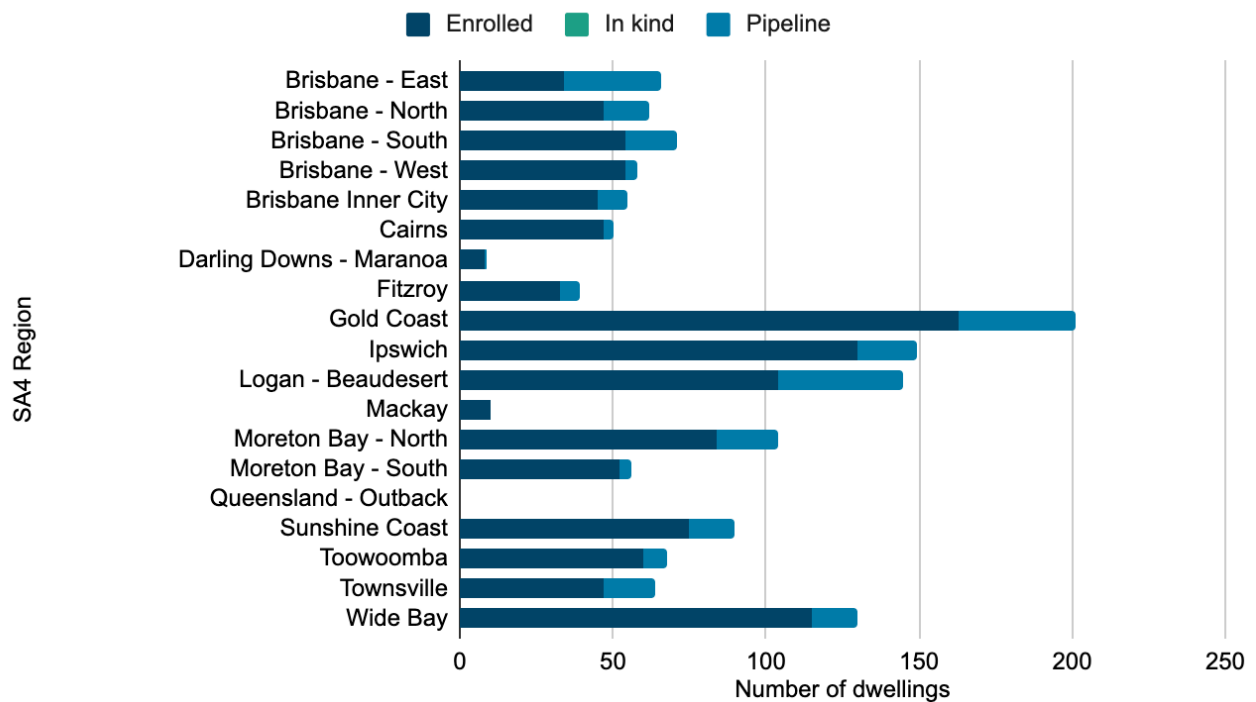
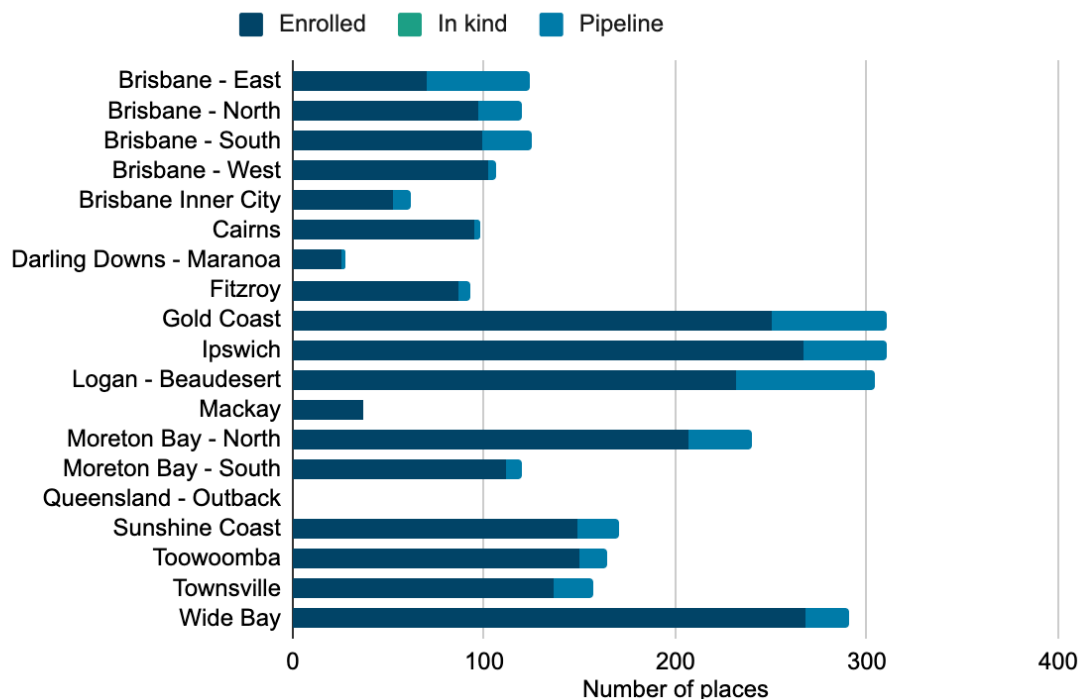


Figure 49 - Estimated SDA places in Queensland (QLD)



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

Table 35 shows the number of dwellings and places in the different SA4 regions in Western Australia. These numbers are also visualised in Figure 50 (number of dwellings) and Figure 51 (number of places).

As seen in Table 35, all SA4 regions had pipeline developments. The SA4 region with the greatest number of pipeline dwellings was 'Perth - South West' (64 dwellings), followed by 'Perth - South East' (43 dwellings). Pipeline dwellings were also being developed in 2 SA4 regions ('Bunbury' and 'Western Australia - Wheat Belt') that currently do not have any enrolled SDA dwellings.

When combining the total number of enrolled and pipeline dwellings, the SA4 regions with the highest forecasted SDA supply were 'Perth - South East' (92 dwellings) and 'Perth - South West' (77 dwellings). The high forecast supply for 'Perth - South West' is noteworthy, given that this region does not currently have a large number of enrolled dwellings.



Table 35 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Western Australia (WA)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Bunbury	0	0	22	22	0	0	31	31
Mandurah	9	0	8	17	28	0	12	40
Perth - Inner	5	0	24	29	10	0	27	37
Perth - North East	6	0	23	29	21	0	47	68
Perth - North West	29	0	36	65	48	0	78	126
Perth - South East	49	0	43	92	81	0	99	180
Perth - South West	13	0	64	77	30	0	94	124
Western Australia - Outback	6	0	5	11	14	0	9	23
Western Australia - Wheat Belt	0	0	6	6	0	0	9	9
Total	117	0	231	348	232	0	406	638

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

Figure 50 - Estimated SDA dwellings in Western Australia (WA)

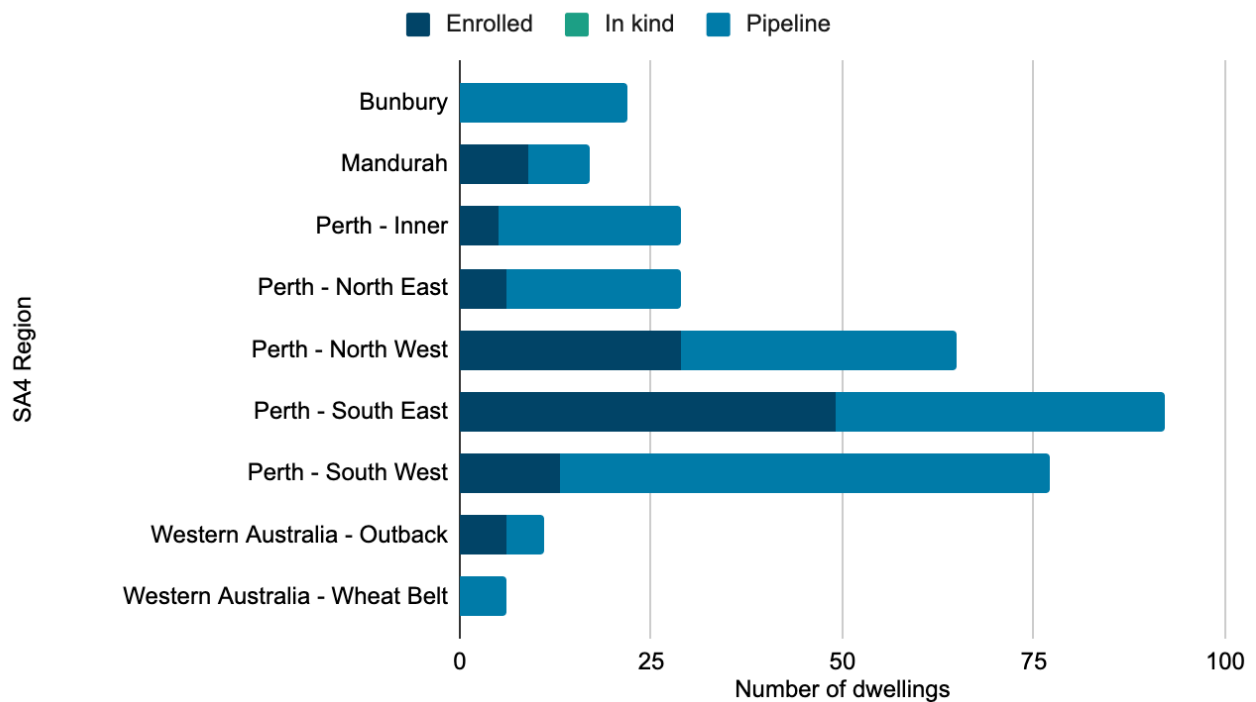
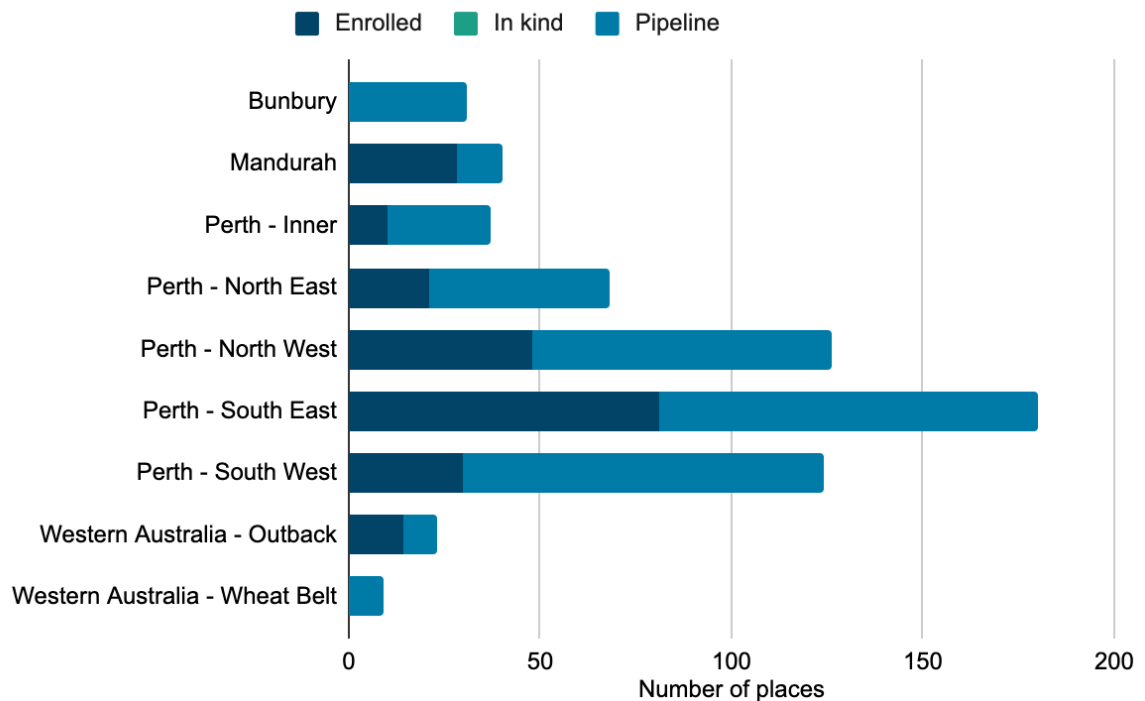


Figure 51 - Estimated SDA places in Western Australia (WA)



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

As seen in Table 36, the SA4 regions with the greatest number of pipeline dwellings were 'Adelaide - North' (46 dwellings) and 'Adelaide - South' (38 dwellings). When combined with the number of enrolled dwellings, these regions also had the highest total forecast supply.

'Barossa - Yorke - Mid North' and 'South Australia - Outback' did not have any SDA dwellings in the pipeline. These 2 SA4 regions also had the lowest number of enrolled dwellings, suggesting that these areas will likely continue to have limited SDA supply available in the near future. See Figure 52 for a visualisation of the number of dwellings and Figure 53 for a visualisation of the number of places.



Table 36 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in South Australia (SA)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Adelaide - Central and Hills	162	0	30	192	331	0	33	364
Adelaide - North	410	0	46	456	999	0	58	1,057
Adelaide - South	338	0	38	376	766	0	56	822
Adelaide - West	205	0	29	234	442	0	44	486
Barossa - Yorke - Mid North	19	0	0	19	50	0	0	50
South Australia - Outback	18	0	0	18	44	0	0	44
South Australia - South East	103	0	6	109	249	0	7	256
Total	1,255	0	149	1,404	2,881	0	198	3,079

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

Figure 52 - Estimated SDA dwellings in South Australia (SA)

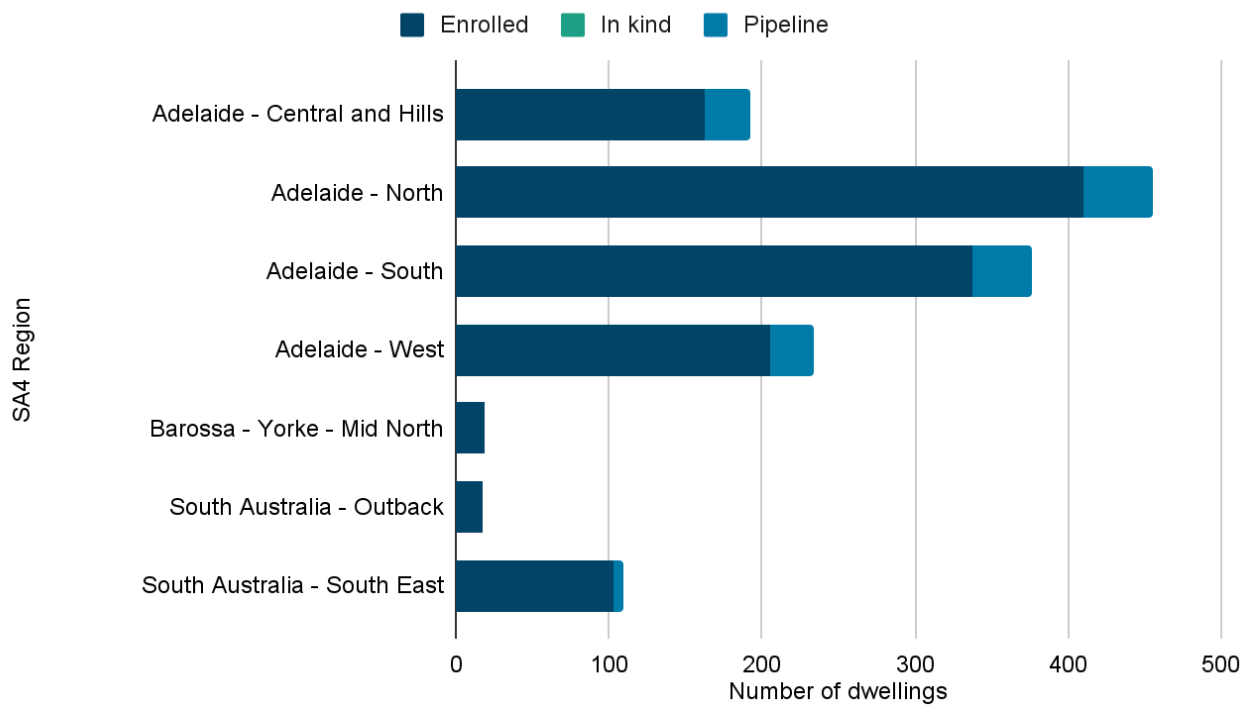
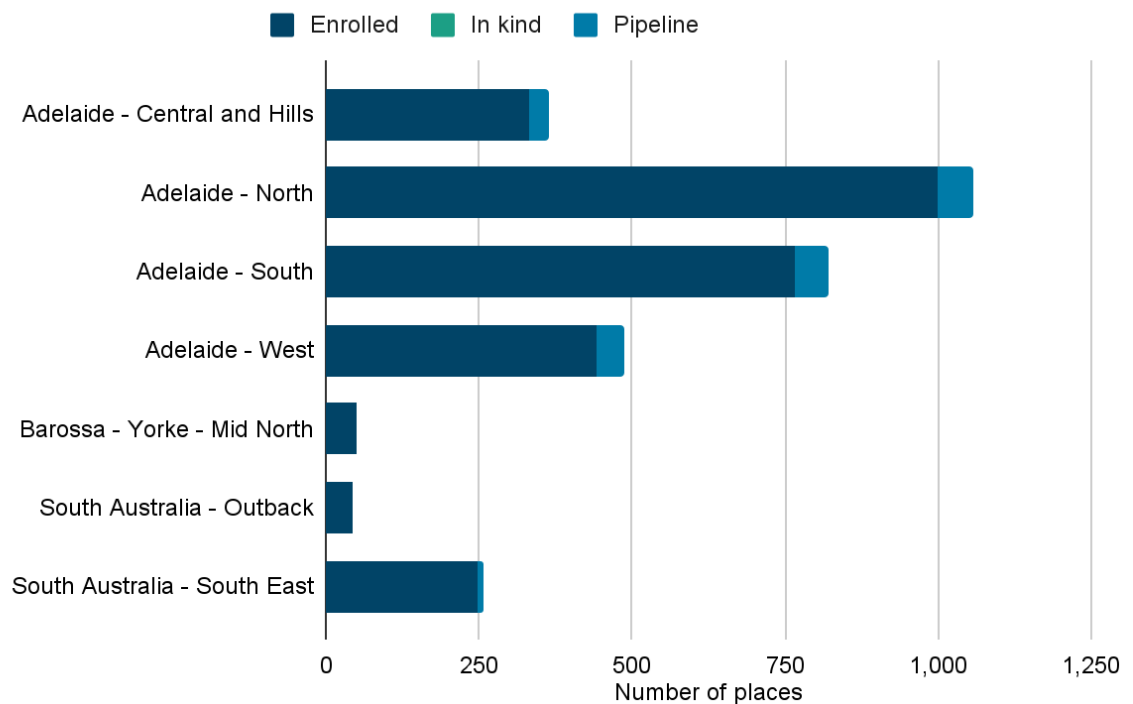


Figure 53 - Estimated SDA places in South Australia (SA)



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

Table 37 shows the number of dwellings and places in the different SA4 regions in Tasmania. These numbers are also visualised in Figure 54 (number of dwellings) and Figure 55 (number of places). Of note, Tasmania is the only state with in-kind dwellings.

As seen in Table 37, the only SA4 region with pipeline dwellings was 'West and North West' (6 dwellings). The SA4 region with the greatest number of in-kind dwellings was 'Hobart', with 111 dwellings.



Table 37 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Tasmania (TAS)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Hobart	15	111	0	126	36	299	0	335
Launceston and North East	19	33	0	52	58	108	0	166
South East	0	2	0	2	0	9	0	9
West and North West	14	57	6	77	37	122	11	170
Total	48	203	6	257	131	538	11	680

Figure 54 - Estimated SDA dwellings in Tasmania (TAS)

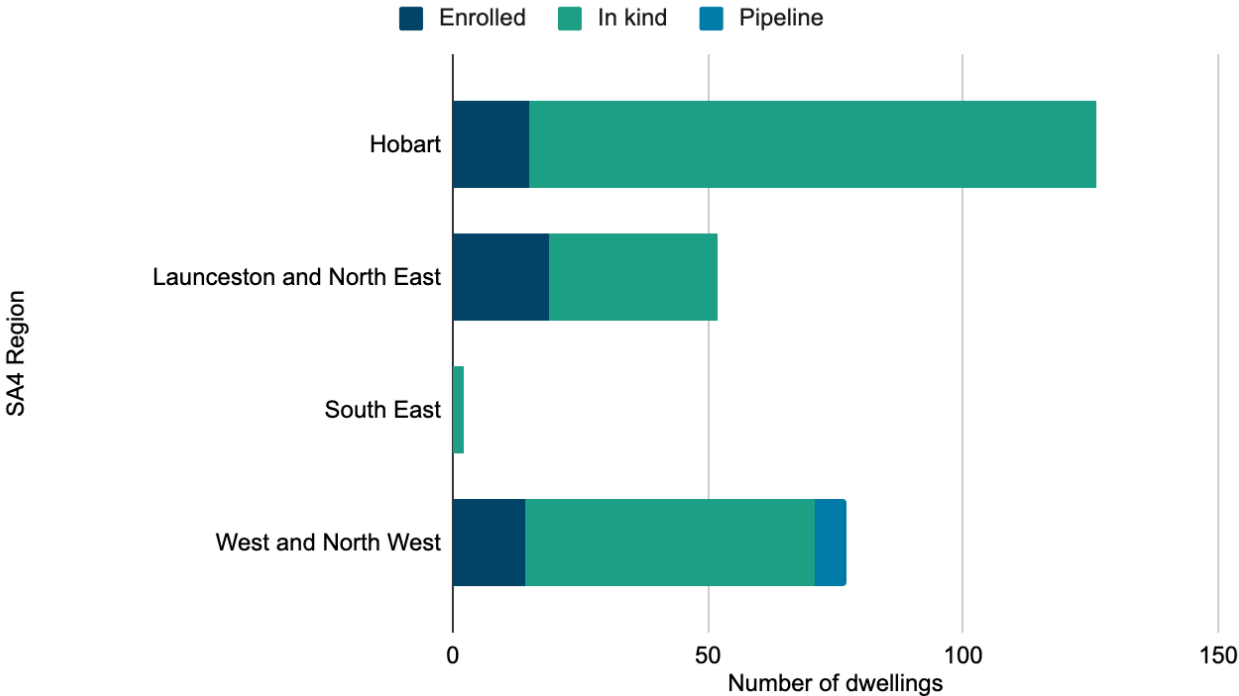
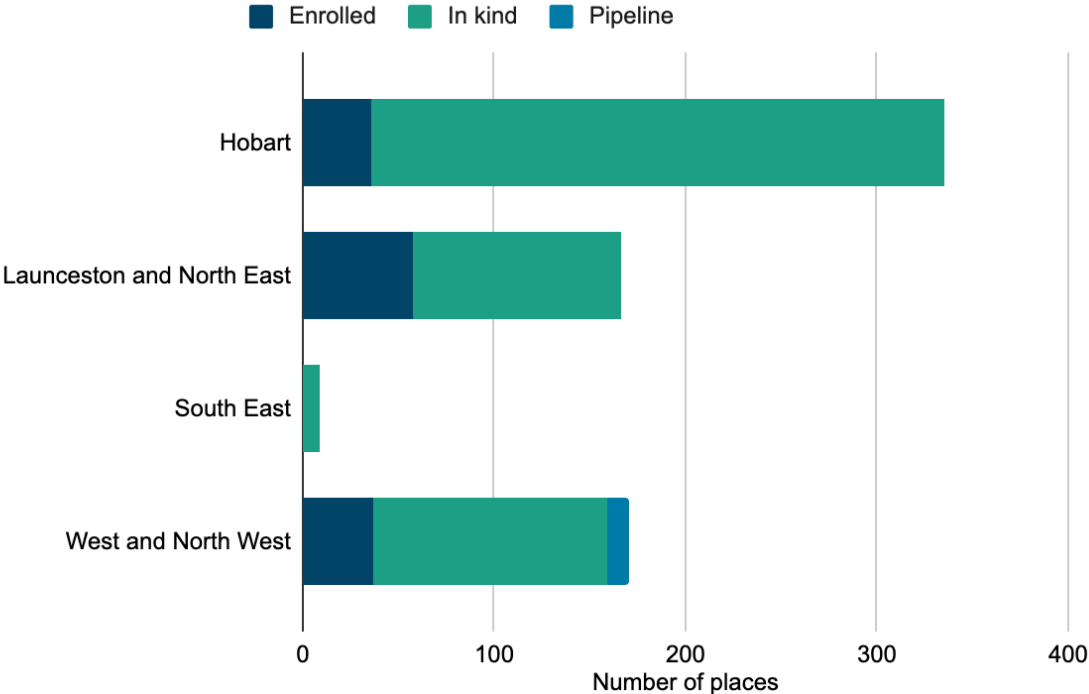


Figure 55 - Estimated SDA places in Tasmania (TAS)



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

Table 38 shows the number of dwellings and places in the Australian Capital Territory, which only has 1 SA4 region. These numbers are also visualised in Figure 56 (number of dwellings) and Figure 57 (number of places).



Table 38 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Australian Capital Territory (ACT)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Australian Capital Territory	165	0	6	171	393	0	12	405
Total	165	0	6	171	393	0	12	405

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

Figure 56 - Estimated SDA dwellings in Australian Capital Territory (ACT)

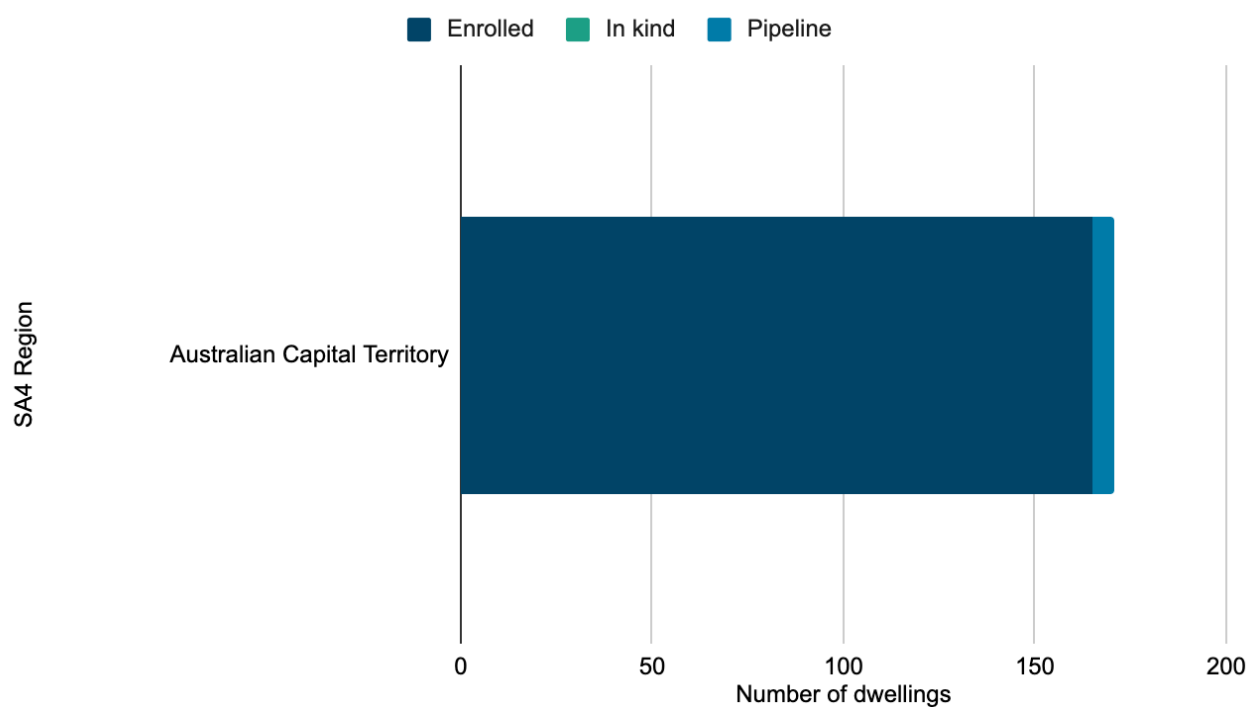
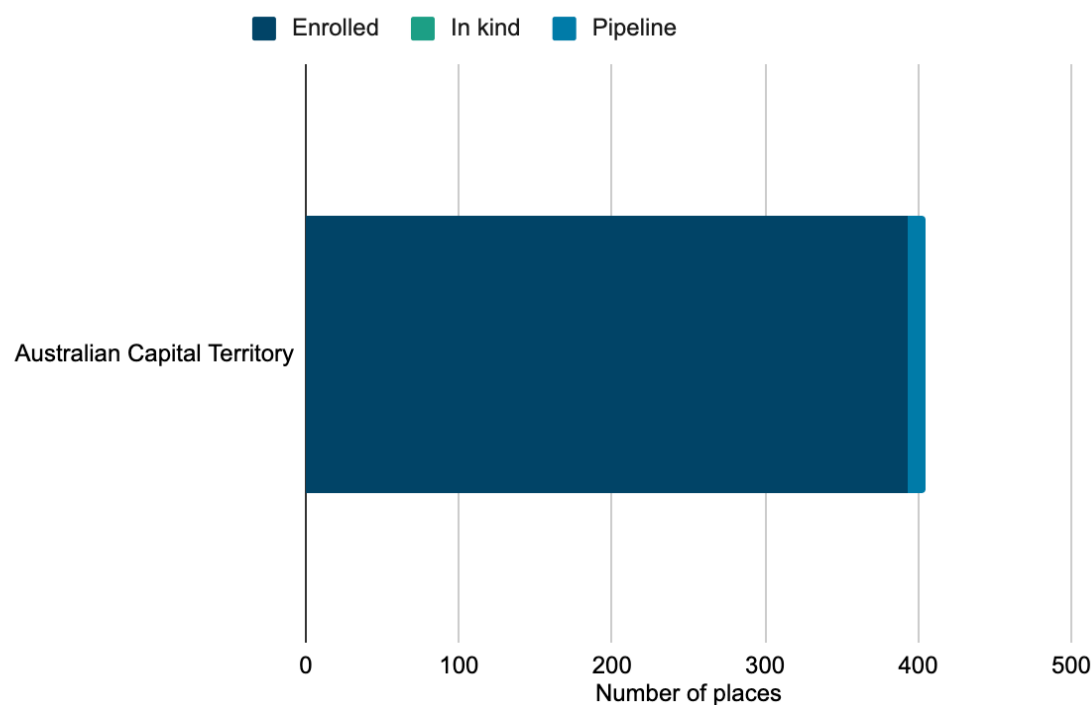


Figure 57 - Estimated SDA places in Australian Capital Territory (ACT)



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

Northern Territory

The Northern Territory has only 2 SA4 regions. 'Northern Territory - Outback' had 8 pipeline dwellings, which is a significant increase from the existing supply in this region (9 enrolled dwellings). 'Darwin' appears to have less growth, with only 2 pipeline dwellings. However, it continues to be the region with the highest forecasted supply, comprising 24 dwellings in total (i.e. enrolled and pipeline dwellings combined). See Table 39, and Figures 58 and 59.



Table 39 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in the Northern Territory (NT)

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In kind	Pipeline	Total	Enrolled	In kind	Pipeline	Total
Darwin	22	0	2	24	74	0	6	80
Northern Territory - Outback	9	0	8	17	24	0	14	38
Total	31	0	10	41	98	0	20	118

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

Figure 58 - Estimated SDA dwellings in Northern Territory (NT)

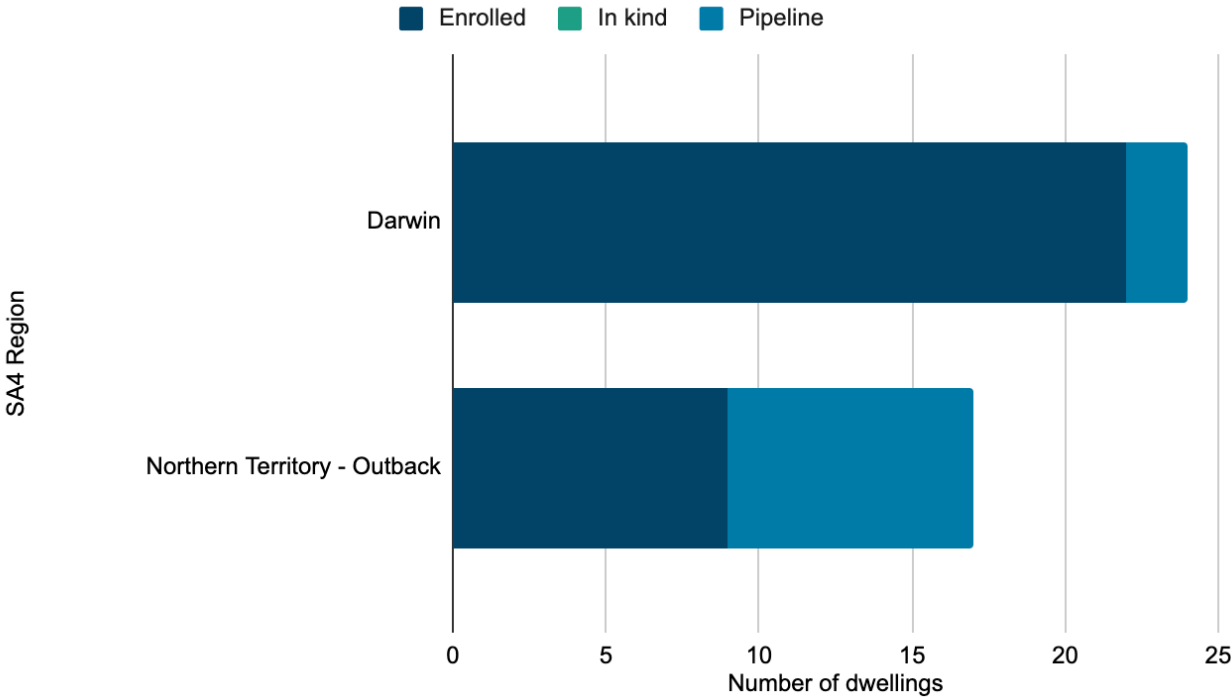
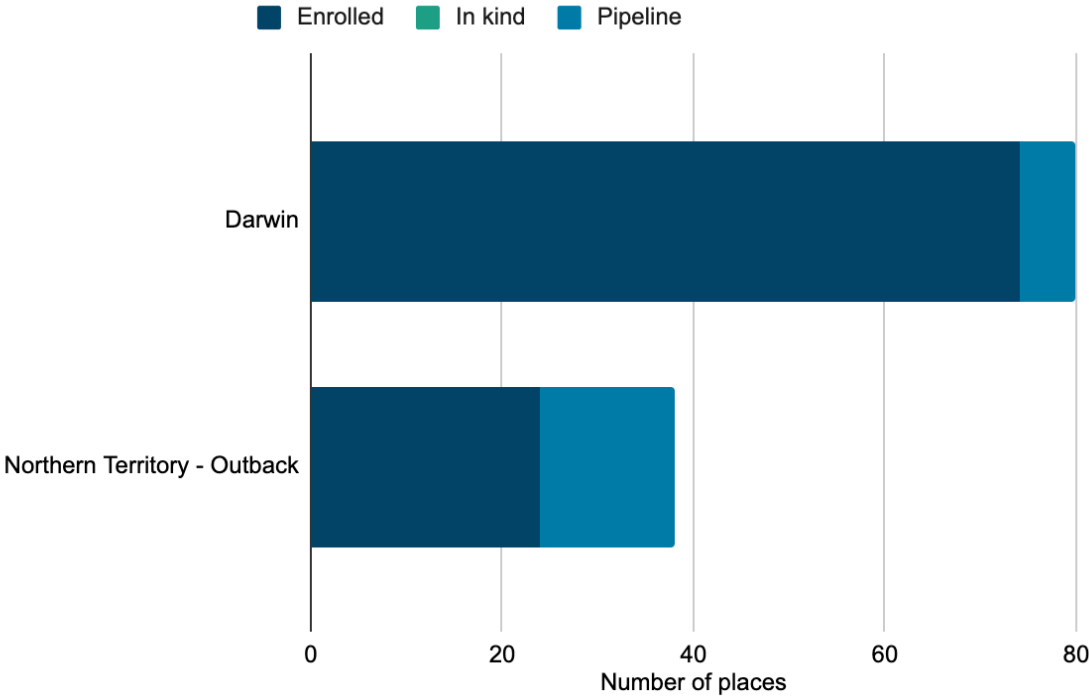


Figure 59 - Estimated SDA places in Northern Territory (NT)



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

Future plans for SDA dwellings beyond the current pipeline

A total of 77 providers responded to this section of the survey, which asked providers about future plans to develop SDA dwellings beyond their current pipeline.

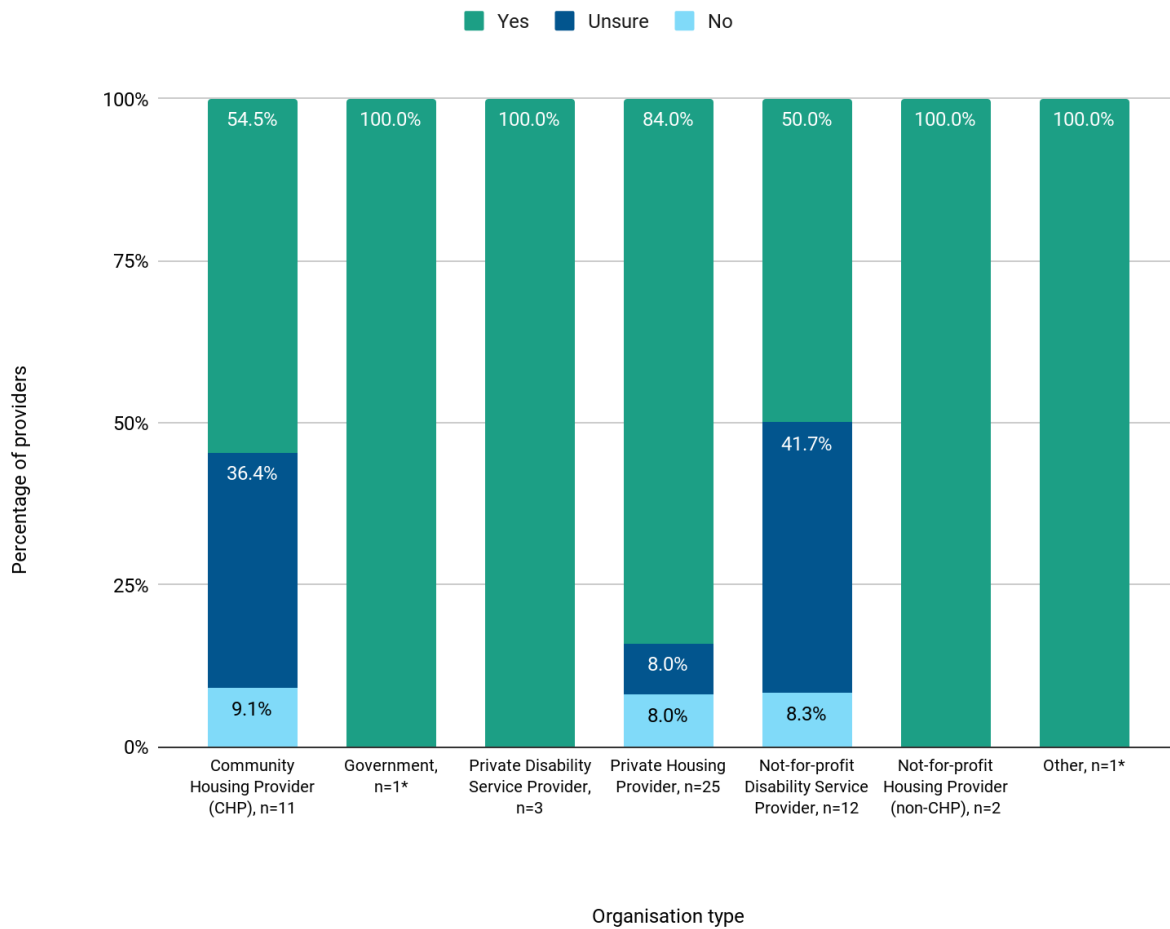
Plans to build more SDA dwellings beyond current pipeline

Most providers (59.7%, $n = 46$) indicated that they are planning to build further SDA dwellings beyond their current pipeline, followed by 29.9% of providers ($n = 23$) who were unsure. A small proportion of providers (10.4%, $n = 8$) reported not having any plans to develop more SDA dwellings.

Future plans by organisation type

Out of the 77 providers who were asked about their future SDA plans, information about providers' organisation types was available for 55 respondents. As seen in Figure 60, more than 50% of providers in all organisation types indicated having plans to build SDA beyond their current pipeline. Organisation types that indicated being unsure or not intending to build beyond their current pipeline were not-for-profit disability service providers (50.0%), CHPs (45.5%), and private housing providers (16.0%). Interestingly, these were the same groups that comprised providers who were very unconfident in the SDA market (see Figure 9) and had experienced a strong decline in confidence since last year (see Figure 11).

Figure 60 - Plans to build beyond the current pipeline by organisation type (n = 55)



* Note = 'Government' and 'Other' only consisted of 1 respondent each; therefore, this proportion needs to be interpreted with caution

Number of places beyond current pipeline

The 46 providers who indicated having plans to build more SDA dwellings beyond their current pipeline were asked to report the number of SDA places they are planning to develop. The providers' plans ranged from only 1 further SDA place to 900 more places. In total, the 46 providers had plans for 2,856 further SDA places.

Reasons for being unsure or not having plans for future dwellings

The remaining 31 providers were asked to disclose the reasons why they were unsure or did not have plans to build further SDA dwellings. Providers' reasons were thematically analysed, with 3 key themes emerging.

Providers ($n = 11$) were unsure or did not have future plans to build more SDA places because of the **current risks in the market**. Providers reflected on vacancy risks, stating that they are already facing difficulties finding tenants for their enrolled SDA dwellings. The complexity and difficulty of dealing with the NDIA, including constant delays, were also reported to be barriers to committing to further dwellings. Financial difficulties and increased costs in the market were also stated as reasons.

"Not enough clients to fill existing vacancies and no funds to build any more properties." - Respondent 53, Unknown organisation type

"The NDIA is too hard to deal with. Delay delay delay." - Respondent 46, Private Housing Provider

Providers ($n = 8$) were also unsure about their future plans because their plans **depended on market and building factors**, such as the availability of funding, availability and suitability of land, availability of coordinated market information, and the success of their current SDA projects. Some providers reported that they build SDA dwellings when suitable opportunities arise, rather than making formal "plans" to build SDA dwellings.

"Depending how the first build goes." - Respondent 66, Private Housing Provider

"Depends on suitable land available and feasibility etc." - Respondent 21, Community Housing Provider (CHP)

Lastly, a small number of providers ($n = 4$) reported that they are unsure if they will commit to further SDA builds because they are **focusing on their current projects**. Providers indicated that they are already fully committed, including financially, to their current building projects so are unable to commit to further projects.

"Wanting to get through the current schedule before committing to anymore." - Respondent 10, Not-for-profit Disability Service Provider

Conclusion

As the fifth edition of the SDA supply survey, this report deepens collective understanding of the market and offers insights on emerging supply trends. The reported information is valuable to a range of stakeholders in the SDA market, including people with disability in need of SDA properties, the NDIA, SDA providers, developers and investors, and state and territory governments.

In total, 79 providers responded to this year's survey, with 62 providing information about their SDA pipeline. A large proportion of these providers were private housing providers. Combined, the providers had a total of 1,522 SDA dwellings with 2,304 places in development. The providers tended to have been building SDA properties for approximately 3 years, with some building SDA since its inception.⁴¹ Thus, this survey involved stakeholders with significant market experience.

Despite the respondents' experience, it is important to acknowledge that this survey did not capture all SDA dwellings that are currently in the pipeline. NDIA data indicates that there were 3,085 pipeline dwellings as of 30 June 2022,⁴² which is more than double what was reported in the current report. However, the current report did capture a broader range of the development life cycle than the NDIA, as it included dwellings prior to the design stage. Indeed, almost half (43.7%) of the pipeline dwellings in this survey had not yet been reported to the NDIA. Therefore, although not comprehensive, the data presented in this report provides a unique perspective on the estimated supply in Australia.

Findings regarding pipeline supply trends

Findings of the pipeline data revealed that the vast majority of SDA places were being developed to High Physical Support design. This has been a consistent trend since the first edition of the SDA supply survey, and is also in line with the large proportion of High Physical Support New Build SDA dwellings that are already enrolled with the NDIA.⁴³ Thus, newly built properties in the SDA market appear to be heavily concentrated on 1 design category, rather than designed for a variety of accessibility needs.

The findings also revealed that Robust design is the second most commonly developed design category, which is consistent with the pipeline trends reported last year. This is encouraging, given that there has been a persistent undersupply of Robust SDA, and it may suggest that potential barriers regarding the perceptions about Robust tenants' needs might be improving.

⁴¹ The maximum amount of time a provider could have been developing SDA was 6 years and 4 months, based on the survey closing date being August 2022

⁴² NDIA (2022). *NDIS quarterly report to disability ministers: Q4 2021-2022*. National Disability Insurance Agency. Table P.10. Downloaded 29 September 2022. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

⁴³ NDIA (2022). *SDA Enrolled dwellings and NDIS demand data: Q4 2021-2022*. P. 13. National Disability Insurance Agency. <https://data.ndis.gov.au/data-downloads>

In terms of building types, there was a relatively even distribution of the pipeline places across apartments, houses, and villas/duplexes/townhouses. This appears to be a new development trend, given that apartments tended to dominate the pipeline in previous supply surveys.

Similar to the findings from the previous supply surveys, group homes continued to be the least commonly developed building type. This suggests that the market continues to move towards more individualised housing options and away from larger shared settings. Indeed, more than two-thirds of the pipeline dwellings were reported to be developed to accommodate a maximum of 1 SDA resident.

The pipeline trend towards developing single-resident properties aligns with the needs and preferences of people with disability. Most seekers of accessible housing have indicated they would like to live by themselves rather than share a property with other people with disability they do not know.⁴⁴ However, it is important to note that several recent reports suggest that SDA funding requests for independent living are often not approved by the NDIA.⁴⁵ Thus, as the newly developed 1-resident SDA dwellings enter the SDA market, the vacancy risk is rising. This is concerning given that vacancy rates in the SDA market are already higher than the rates in the mainstream rental market⁴⁶ and the rates in the SDA pricing arrangements,⁴⁷ highlighting an urgent need for changes to the timeliness and accuracy of NDIA decision-making for SDA funding.

Findings regarding providers' approaches and confidence

In addition to pipeline information, the survey also explored providers' market approaches, including what resources providers are using to inform their build decisions, such as where and what to build. Encouragingly, providers tended to consult with a variety of resources rather than relying on 1 source of information. Moreover, people with disability were the

⁴⁴ Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022). *Housing seeker snapshot*. Housing Hub and Summer Foundation. <https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers>; Wellecke, C., Aimers, N., Rathbone, A., & Winkler, D. (2021). *Housing seeker snapshot*. Housing Hub and Summer Foundation.

https://downloads.ctfassets.net/blhxs4s3wp2f/1Ve3btZAUzSI2TyVuTn51/f2f1e3226133f54993e10eea484fc3ea/2021_12_Housing_Hub_Seeker_Snapshot_Report.pdf

⁴⁵ Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., & Rathbone, A. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>; Skipsey, M., Winkler, D., Cohen, M., Mulherin, P., Rathbone, A., & Efstathiou, M. (2022). *Housing delayed and denied: NDIA decision-making on Specialist Disability Accommodation*. Public Interest Advocacy Centre and Housing Hub. <https://apo.org.au/node/317589>; Aimers, N., Rathbone, A., Winkler, D., Wellecke, C., & Mulherin, P. (2022). *CHPs and disability housing: An exploration of SDA*. Housing Hub and Summer Foundation. <https://apo.org.au/node/317170>; Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/316937>

⁴⁶ Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., & Rathbone, A. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. <https://apo.org.au/node/318315>

⁴⁷ NDIA (2022). *NDIS pricing arrangements for Specialist Disability Accommodation 2021-22*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments>

most commonly consulted group for a variety of build decisions. This is again an encouraging finding, given that engagement with people with disability is paramount to developing SDA that meets the needs of tenants.

Interestingly, while NDIA data and Housing Hub data were frequently used to inform decisions about the building type, design category and location, these 2 resources were less commonly used during the design phase of SDA projects. The Housing Hub provides opportunities for housing providers to connect with housing seekers in the accessible housing market, as well as releases data insights about where people with disability are searching to live and what housing design features are needed and preferred by housing seekers. See Appendix E for more information about available Housing Hub services and resources.

The survey also explored providers' confidence levels in the SDA market, with approximately a third of providers reporting they felt slightly or very unconfident. Issues around SDA funding approvals were cited as a reason for the low confidence levels. This included slow approval times, inconsistent funding decisions, and an overall lack of NDIS participants with SDA funding approved in their plans. These factors have been ongoing barriers in the SDA market that have already been identified in a number of previous reports, including last year's SDA supply survey.⁴⁸ Providers also stated that the rising building costs and interest rates contributed to their low market confidence. The upcoming SDA Price Review will be a key opportunity for the NDIA to work with the sector to ensure that SDA pricing keeps pace with the current market conditions.

Issues around SDA funding and financing may be deterring providers from expanding their SDA pipeline activity. Indeed, although this year's survey had slightly more providers contributing information about their pipeline (62 providers this year versus 59 providers last year), the number of reported dwellings and places has slightly decreased (1,522 dwellings and 2,304 places this year versus 1,661 dwellings and 2,366 places last year). Moreover, providers tended to have a smaller scale of pipeline activity, with fewer providers developing between 51-150 places compared to last year. Together, these findings may indicate that providers are beginning to embark on fewer new SDA projects, which may be a result of feeling uncertain about the future of the market. There appears to be a disconnect between the lack of SDA market confidence reported by SDA providers and the appetite of wholesale investors to fund new SDA at scale.^{49,50,51}

⁴⁸ Skipsey, M., Winkler, D., Cohen, M., Mulherin, P., Rathbone, A., & Efstathiou, M. (2022). *Housing delayed and denied: NDIA decision-making on Specialist Disability Accommodation*. Public Interest Advocacy Centre and Housing Hub. <https://apo.org.au/node/317588>; Aimers, N., Wellecke, C., Winkler, D., Rathbone, A., & Mulherin, P. (2021). *Specialist Disability Accommodation – Supply in Australia: November 2021*. Housing Hub and Summer Foundation. <https://apo.org.au/node/314855>

⁴⁹ Ashokan, T. (2022) Lighthouse raises A\$300m for second disability accommodation fund. **Infrastructure Investor**, 22 July

⁵⁰ Lenaghan, N. (2021) Australian Unity raises \$30m for special disability housing. **Australian Financial Review**, 26 September

⁵¹ Lenaghan, N. (2021) Goldman Sachs backs disability housing in \$137m deal with Synergis, **Australian Financial Review**, 5 December

Despite these market issues, it is noteworthy that a relatively large proportion of providers (43%) were at least somewhat confident in the market, and a third of providers reported that their confidence had increased since last year. Many of these providers recognised the potential of the SDA market, noted benefits from enhanced relationships with other stakeholders, and hoped that the change in Federal Government will result in improvements in the market. Providers were hopeful that the newly appointed Australian Labor Party will lead to a return to the Scheme's initial values and principles, with some providers reportedly already noting positive market developments. This is an encouraging finding and highlights an opportunity for the new Government to enhance the NDIA's market stewardship and ensure the ongoing viability of developing SDA properties based on participant demand.

Appendix A: 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 4 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.

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 B: Data screening for SDA supply pipeline

A total of 56 providers completed the SDA supply pipeline section of the current survey, together reporting a total of 1,483 dwellings. 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

Based on these 1,483 dwellings, the total number of SDA places reported in the current pipeline was 2,215. Note that this only includes the pipeline data that was reported by providers who participated in this year's survey. Dwellings from the previous supply survey that were still considered to be in the pipeline but were not reported this year (because the provider did not participate in this year's survey) were added to this pipeline data. Dwellings were considered to still be in the pipeline if their estimated occupancy date was August 2022 or beyond (as reported by providers in the previous survey).⁵² This resulted in an additional 39 dwellings and 89 places being added from a total of 6 providers, all of which did not provide any pipeline data in this year's survey.

Therefore, the pipeline data presented in the current report is based on the responses of 62 SDA providers. The combined pipeline total revealed that there were 1,522 dwellings in development, creating a total of 2,304 SDA places. This is equivalent to an average of 1.5 SDA residents per dwelling.

For accuracy, the statistical geography of each dwelling in the SDA pipeline was determined using ABS maps⁵³ to identify the 2011 Statistical Area Level 4 (SA4)⁵⁴. This was done based on the address provided by the survey respondents for each dwelling. If only part of the address was available, such as the suburb and/or postcode, the statistical geography was based on the central point of that region.

⁵² This date is an estimated occupancy date only and should be interpreted with caution

⁵³ Available here: <https://maps.abs.gov.au/>

⁵⁴ The NDIA reports geographical data relating to SDA according to the Australian Statistical Geography Standard (ASGS) release 1, 2011. Therefore, the current report classified pipeline data according to the 2011 SA4 regions to enable comparisons to NDIA data

Appendix C: List of contributors who provided consent for publication

The Housing Hub and Summer Foundation sincerely thank all providers who participated in the survey.

1. Ability Housing
2. Ability SDA Pty Ltd
3. Able Australia Services
4. Access 2 Place Housing
5. Accessible Homes Australia
6. Accessible Housing (Victoria)
7. ADAPT Housing
8. Adaptive Housing
9. AnglicareSA t/a Believe Housing Australia
10. ARD Housing Group
11. BlueCHP Ltd
12. Brisbane Housing Co Ltd
13. Casa Capace
14. Cerebral Palsy Foundation Pty Ltd
15. Choice Health & Wellbeing Group
16. Churches of Christ Housing Services
17. Colac Otway Disability Accommodation Inc
18. Community Housing Canberra
19. Community Housing Limited
20. Community Living & Respite Services
21. Cooina Terang Inc
22. Disability Homes Victoria
23. Disability Living Inc
24. ELJET Property Group
25. Enliven Housing
26. Erwin Vogt Foundation (Uniting Communities)
27. Evolve Housing
28. Finding Yellow
29. Focus Care Adelaide
30. Focused Supports
31. Good Housing
32. gproperty pty ltd
33. Grayllen Co. Pty Ltd
34. Guardian Living Australia
35. Horizon SDA Care
36. Housing Choices Australia
37. Hume Community Housing
38. Hunter Carers Limited
39. Identitywa
40. Illowra
41. Independent Living Villages
42. inhousing
43. Kennett Ridge Pty Ltd
44. Kyeema Support Services Inc
45. Li-Ve Tasmania
46. Life Choice Wide Bay Burnett
47. Link Wentworth Housing Limited
48. LX Holding
49. McCall Gardens
50. Mercy Connect Limited
51. Minda Housing Limited
52. MS Plus
53. Multitask
54. MyLife Housing Pty Ltd
55. Perth Design + Construct
56. Perth Disability Homes
57. Purposed Housing Australia
58. Quest Innaloo
59. Sana Living
60. SDA by Project Friday
61. SDA Management Australia
62. SDA Management Services WA
63. Shift
64. SJG Marillac
65. Southern Stay Disability Services Inc
66. Summer Housing Ltd
67. Sunnyfield

68. Sylvanvale Limited
69. Szabo Pty Ltd t/as SDA Smart Homes
70. The Housing Connection
71. Uniting VT
72. Unity Housing Company

73. Vera Living
74. Youngcare
75. YourPlace Housing Ltd
76. Yumba-Meta Limited

The above list shows the providers who contributed to this year's survey and provided consent to be listed as a contributor.⁵⁵

⁵⁵ This list includes providers whose pipeline data was added from the previous supply survey

Appendix D: Questions for people with disability

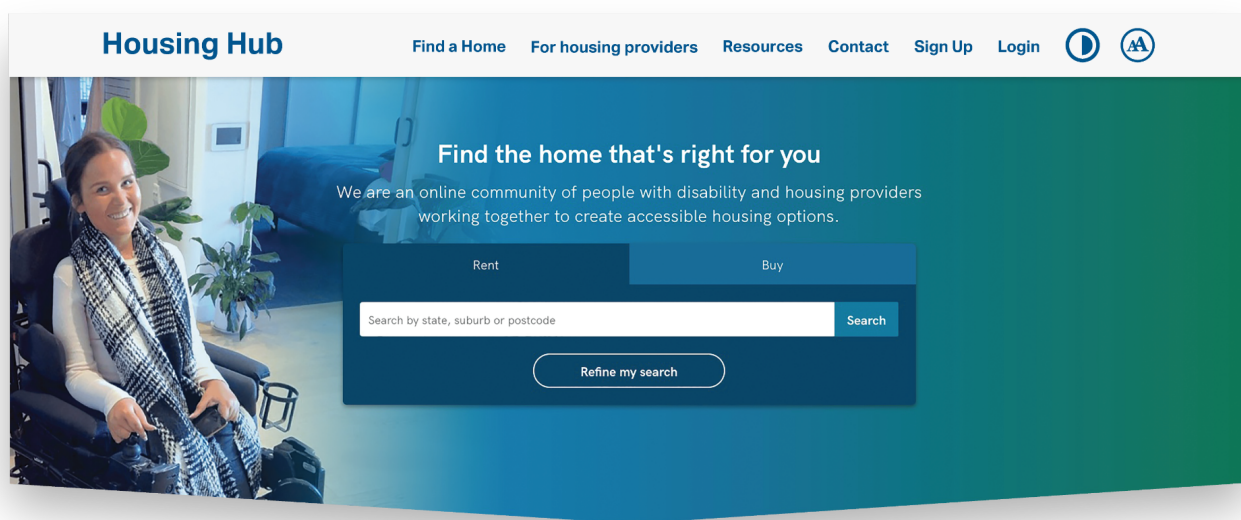
The following is a list of the questions that providers reported they would like to ask people with disability:

- More feedback on robust specifications from participants and their stakeholders and behavioural therapists would be great.
- In an ideal world where funding is not an issue, what housing model do you really want?
- What technology are they bringing into the home or considering and how can the home be better designed to support this?
- Any feedback on fixtures and fittings that a provider should consider (e.g. approved taps, blinds etc - what is the real-world experience in the home)?
- What are requirements beyond the SDA design guidelines that have made finding a suitable home challenging (e.g approved for IL [Improved Liveability] but requires a quiet home)?
- Is there room for improvement in design to enable their ability to access education, employment, skill building and/or meet their goals? - e.g. study nook for home office set-up in a room?
- Key features they'd like to see in their future home they'd envisage living in. Would these key features change if you envisioned the home long-term accommodation that you may age in place in?
- What is important to you when deciding on a property to live in?
- Vocational preferences
- Please provide any requirement that is most important to consider renting the house from us.
- Is there anything unique (not provided within the SDA design guidelines) that will assist you in your day-to-day living?
- Every disability is different and unfortunately the inflexibility of the SDA rules limits catering for individuals' disability needs. The apartments need to be designed to pass audit regardless of the individual's needs that are sometimes at odds with the SDA rules.
- Do they prefer their own apartment or shared housing?
- What kind of supports are you hoping to bring into your home?
- How can we help build a suitable dwelling for a long-term stay, what features within the design category can we include?

Appendix E: 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 well over 2,000 properties currently listed, the Housing Hub features all design categories of Specialist Disability Accommodation (SDA), as well as many other types of accessible housing. To understand more about the listings on the Housing Hub, review the [Listing Snapshot Report](#).



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 tells the seeker just how good a match the property is to 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 for their profile. For more information on how housing seekers are using the Housing Hub, check out the [Housing Seeker Snapshot report](#).

Generalised data resulting from housing seeker profiles on the Housing Hub provides insights into the demand for accessible housing across Australia. With around 17,000 users and 85,000 page views every month – and around 500 enquiries generated to property owners per month – 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

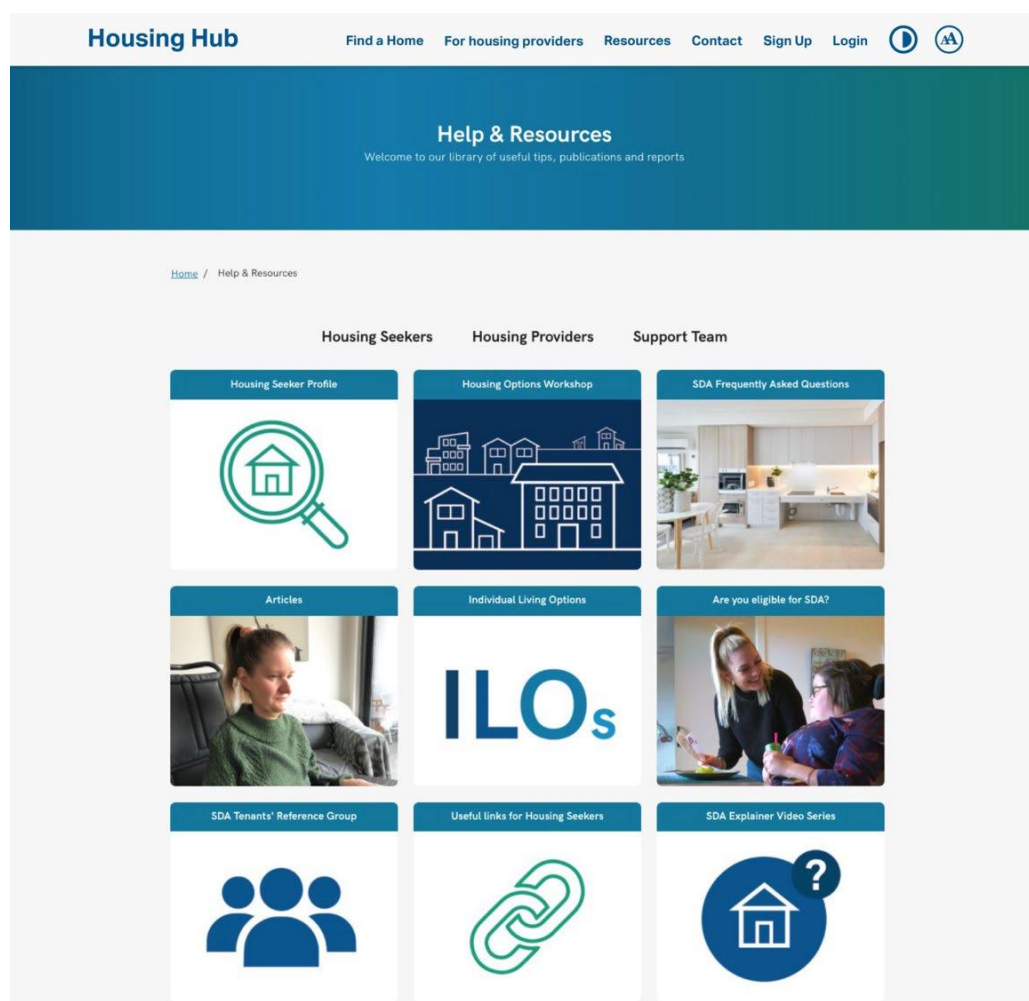
The Housing Hub website contains a library of resources for housing seekers, supporters and housing providers – including videos, guides and templates. To explore, go to:

www.housinghub.org.au/resources

Services for housing seekers

The Housing Hub team provides a range of services to support housing seekers. Via workshops, resources, support coordination services, and the SDA Housing Advice Line (1300 61 64 63), we support people with disability 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 free to use the Housing Hub to create property listings and receive enquiries from prospective tenants.

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

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 certain locations, providers can build to address demand with greater certainty. The Housing Hub offers 2 types of market data reports to support greater understanding of housing needs in locations.

Market data subscription

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 April, July, October and January each year. Each report includes the 3 preceding months of data for both demand and 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 this SDA Supply in Australia report. [Click here for more information.](#)

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 this SDA Supply Report report. Data is shown for a 3-month period in detail for the selected Local Government Area. [Click here for more information.](#)

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 of more than 8,000 housing seekers. [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](#).

Housing Hub listing service

Let the Housing Hub's experienced team take care of creating your listings. The Housing Hub team can arrange to have high quality images taken of your property, write the copy and create the listing. [Click here for more information.](#)

Listing performance dashboard

For providers who would like to analyse the performance of their listings on the Housing Hub, a customised listing dashboard can be created to track the performance of each listing on a daily basis across key metrics such as views, enquires, phone calls and website click throughs. [Click here for more information.](#)

Individual matching service

Housing Hub's experienced tenancy matching team can support providers to identify potential tenants eligible for SDA funding for single vacancies in SDA properties. [Click here for more information.](#)

Building SDA properties for identified tenants

The Housing Hub's work has identified people with disability seeking SDA dwellings who have not been able to identify a new home. The Housing Hub is interested in connecting with SDA providers who would consider working with a group of prospective tenants in a given location to develop housing that meets their needs and preferences. [Click here for more information.](#)

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, so complements 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.](#)

Understanding the needs of your customers

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. [Click here for more information.](#)

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.

Appendix F: 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 RAC. 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 RAC and younger people at risk of entering RAC) 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 RAC. 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 Verbinding, a registered support coordination provider.

More than 15 different disability organisations are 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.

