

Specialist Disability Accommodation Supply in Australia

January 2021



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Housing Hub

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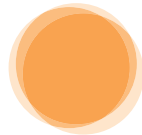
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Foreword

The Housing Hub is very pleased to present this latest edition of *Specialist Disability Accommodation – Supply in Australia*.

This is the third annual report of its type, building on previous work of the Summer Foundation and Social Ventures Australia. This report remains the most comprehensive snapshot of how the market is responding to address the long-term undersupply of housing for people with disability.

Specialist Disability Accommodation – Supply in Australia provides an update on the growth of Specialist Disability Accommodation (SDA) across Australia and shares insights into current market sentiment.

The data in this report results from a survey of SDA providers in October and November 2020. In response to the survey, 57 SDA providers supplied information about their pipeline of SDA.

There are now more than 1,800 new SDA places in the construction pipeline as at 10 November 2020.

When these pipeline properties are considered together with the 11,500 New Build SDA places reported in the most recent NDIS Quarterly Report (30 September 2020) approximately 13,000 new SDA places now exist or are in the pipeline. This compares to the roughly 11,000 SDA places that were either new or in the pipeline at the same time in 2019.

The continued growth of SDA supply is a finding that is sure to be welcomed by people with disability, policy makers and the sector more broadly.

Since the first SDA supply report was released by the Summer Foundation in 2018, significant changes have been made to both the policy settings for SDA and the SDA Rules. These changes are creating greater certainty for investors, developers, housing providers and SDA tenants, and as a result are positively influencing market sentiment.

The continued growth and maturity in the SDA market presents both opportunities and challenges for those on the supply side. Beyond the pipeline identified, there remains a significant undersupply of SDA dwellings.

We intend for this report to inform the next phase of investment in SDA by shedding light on current development activity and on particular jurisdictions and design categories where more focused efforts to generate supply may be needed.

As the SDA market matures, it will become increasingly important for developers to consider the housing needs and preferences of people who have or are eligible for SDA funding to ensure the suitability of any planned development.

The first edition of this SDA supply report was motivated by a vision for Australia where all people with disability have access to high quality housing that meets each person's requirements and fosters each person's connection to their communities. The Housing Hub looks forward to continued work with people with disability, providers, investors, governments and other partners to create an SDA market that delivers on this vision.



Di Winkler PhD AM
CEO & Founder, Summer Foundation

The Housing Hub is an initiative of the Summer Foundation.

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Executive Summary

This report provides a comprehensive summary of the current supply of Specialist Disability Accommodation (SDA) in Australia. A national survey of SDA providers and developers was undertaken in October-November 2020. Building on previous iterations of the *Specialist Disability Accommodation - Supply in Australia* reports (published in March 2019 and March 2020), this survey collected data about new SDA in the development pipeline (from contracted to completed and yet to be enrolled).

The National Disability Insurance Scheme (NDIS) provides housing payments for people with disability who need housing designed to maximise their independence and choice. This housing payment, as well as the bricks-and-mortar dwelling, is called SDA. Despite commencing in 2016, SDA funding is currently only being paid to 54% of the estimated 28,000 NDIS participants who are expected to be eligible for SDA.

The over 12,000 remaining people who are eligible for SDA funding are likely to be living in government housing, hostels, residential aged care, or with family. Once the unmet demand and the need to replace old stock with contemporary models of disability housing is taken into account, new housing is needed for an estimated 19,000 NDIS participants over the next 10 years.

New SDA is required across Australia to meet this demand. Understanding the current pipeline of supply of new housing is critical to supporting the SDA market development. The National Disability Insurance Agency (NDIA) currently provides supply data for in-kind and enrolled SDA, but does not provide information on housing projects that are in development.

Therefore, this survey offers insights into the SDA pipeline across Australia in 2020, and combines the survey results with the data published by the NDIA to provide the market an estimate of the supply pipeline. This report also provides insights into the experience of SDA providers. This includes their views about the SDA market as a whole, as well as plans they may have to develop further SDA.

Data for this report was contributed by 57 SDA developers, revealing that there are 1,817 SDA places in development. When combined with the latest NDIA data on SDA, there are an estimated total of 13,300 places enrolled and, in the pipeline, (1-5 resident dwellings).¹

More than half of the SDA places in the national SDA pipeline are being built in Queensland (28.6%) and Victoria (26.3%), followed by New South Wales (24.2%). These findings show that there is a more even spread of development activity than in previous years, where development had been primarily concentrated in New South Wales.

Table 1 – Estimated number of SDA dwellings and places in development as at 10 November 2020

<i>State</i>	<i>Dwellings</i>	<i>Places</i>
NSW	288	440
VIC	367	478
QLD	366	520
WA	229	290
SA	62	77

In addition to the overall number of SDA under development, the survey found that 77.6% of the estimated number of dwellings in the pipeline around Australia will accommodate only one resident. This indicates that the SDA market is moving away from larger settings that accommodate multiple residents and instead is focusing on building SDA in smaller settings.

Furthermore, the survey estimates the number of SDA places reported by building type across Australia. Apartments account for a significant majority (54.3%) of all SDA places, followed by houses (21.2%), villa/duplex/townhouses (17.9%), and group homes (6.5%). Compared with the previous surveys, the most significant change is in relation to group homes, with a decrease of approximately 389 SDA places.

¹ NDIA (2020). 'SDA Enrolled Dwellings and NDIS Demand Data.' Appendix P, Table P. 4; Table P.6.

Data available at: data.ndis.gov.au/data-downloads

The pipeline data is also reported by design category. This reveals that High Physical Support dwellings continue to be the dominant design category under development this year (representing 66.5% of the pipeline) as has been the case for the past two years. While the Robust design category continues to lag behind all others, this year it is promising to see an increase in Robust dwellings being developed at 6.6% of the pipeline.

This report also presents the results of additional questions put to SDA providers and developers, including their plans to further develop SDA. The estimated total number of future SDA beyond the pipeline reported was 5,061 dwellings to be developed within the next five years. It was encouraging to see that more than half of the respondents said that they are confident in the SDA market.

SDA developers also reported on the range of ways they understand their customers needs and preferences. A variety of sources of information were quoted. The development of demand for SDA and in particular demand data and information on the needs and preferences of potential tenants continues to be an important area of focus to ensure a strong SDA market is developed.

The results from this survey are encouraging, as they demonstrate an emerging SDA market in which developers are confident demand for their housing will continue to grow. With active stewardship from the NDIA, the SDA market has the potential to be a world-first demonstration of leveraging private capital to deliver quality housing that meets the needs of people with disability at a national scale.

The SDA market

What is SDA?

Specialist Disability Accommodation (SDA) is housing that has been specially designed to suit the needs of people with disability who have an 'extreme functional impairment' or 'very high support needs'. The features of an SDA property are intended to support the resident(s) to live as independently as possible and in so doing reduce their lifetime support costs.

It is expected that around 28,000 NDIS participants – or around 6% of all participants – will ultimately be funded for SDA, with the NDIS then spending an estimated \$700 million per year on SDA payments.² Based on this, building the scale of housing required for the SDA

market has the potential to stimulate around \$5 billion in private sector investment.³

As at 30 September 2020, 15,240 NDIS participants have SDA funded in their NDIS Plans (or approximately 54% of the projected total).⁴

The SDA housing market is developing rapidly and is expected to create thousands of new dwellings for people with disability over the next few years. As noted in last year's *Specialist Disability Accommodation – Supply in Australia* report, there has been a marked shift away from government-supported development towards private SDA providers leveraging private capital.

² NDIA (2018). 'SDA Provider and Investor Brief'. www.ndis.gov.au/providers/housing-and-living-supports-and-services/housing/specialist-disability-accommodation/sda-design-standard

³ PricewaterhouseCooper and Summer Foundation (2017). 'NDIS Specialist Disability Accommodation: Pathway to a Mature Market'. <https://www.summerfoundation.org.au/wp-content/uploads/2017/08/pwc-summer-foundation-sda-market.pdf>

⁴ NDIA (2020). 'SDA Enrolled Dwellings and NDIS Demand Data.' Appendix P, Figure P.1. Data available at: data.ndis.gov.au/data-downloads

Over the past 18 months, many of the early inadequacies in SDA policy settings and the related regulatory framework have been addressed, and the *SDA Rules* were amended in June 2020 to create greater flexibility for SDA tenants around who they can live with. These changes have resulted in greater control and safeguards for NDIS participants, and greater certainty for SDA providers.

A continuing challenge for the market is to identify the almost 13,000 additional NDIS participants who are expected to be eligible for SDA funding and support their transition into more suitable housing.⁵ Many of these people may have lived with low expectations for many years and have had limited opportunities to learn about and explore housing options.

SDA payments

SDA funding is included in the NDIS Plans of eligible NDIS participants. SDA payments from a participant's Plan are made directly to the provider of the SDA property the participant lives in. SDA payments are not made to providers of vacant properties.

The amount a housing provider receives in SDA payments depends on the building type (house, apartment, villa/duplex), the SDA Design Category of the property (see below) and its location. SDA payments are intended to cover the additional build costs of the property over a comparable standard build and provide a long-term commercial return that is sufficiently generous to encourage SDA investment.

In addition to the SDA payments from a participant's Plan, the participant also pays what is known as a Reasonable Rent Contribution (RRC) to their SDA landlord. The RRC is capped at 25% of the Disability Support Pension, plus rent assistance or equivalent for a person receiving a different source of income – the total equates to approximately \$8,550 per year.

The SDA model of funding under the NDIS creates a user-driven market, where the NDIS participant with SDA funding decides where they live and who they live with. As a consequence, SDA providers who develop stock that reflects the needs and preferences of people with SDA funding reduce their vacancy risk and maximise the return on their investment. This model will deliver better housing outcomes for people with very high and complex disability support needs.

⁵ NDIA (2018). '*SDA Provider and Investor Brief*.' www.ndis.gov.au/providers/housing-and-living-supports-and-services/housing/specialist-disability-accommodation/sda-provider-and-investor-brief

SDA Design Categories and Design Standard

SDA dwellings are enrolled with the NDIS in one of five SDA Design Categories:

Basic – older SDA properties that don't have any special design features. Basic SDA is no longer being built.

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 one 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. It has good sound-proofing, so that sounds from outside don't upset the tenant and so that any noise the tenant makes doesn't upset 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 2019 the Australian Government announced it would introduce a pre-certification process for new build SDA dwellings, as well as an SDA Design Standard that will apply to SDA properties enrolled in the NDIS after 1 July 2021. The SDA Design Standard sets out detailed design requirements that will be incorporated into newly built SDA. More information about the SDA Design Standard is available on the NDIS website.⁶

⁶ NDIA (2020), 'SDA Design Standard', www.ndis.gov.au/providers/housing-and-living-supports-and-services/housing/specialist-disability-accommodation/sda-design-standard

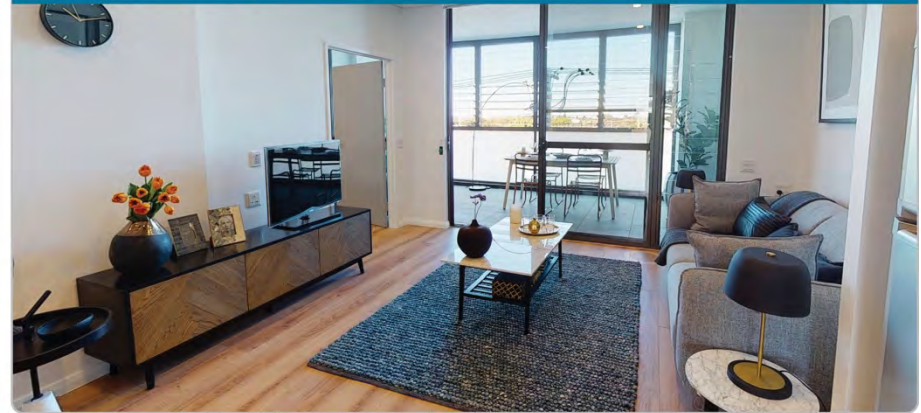
Basic

SDA



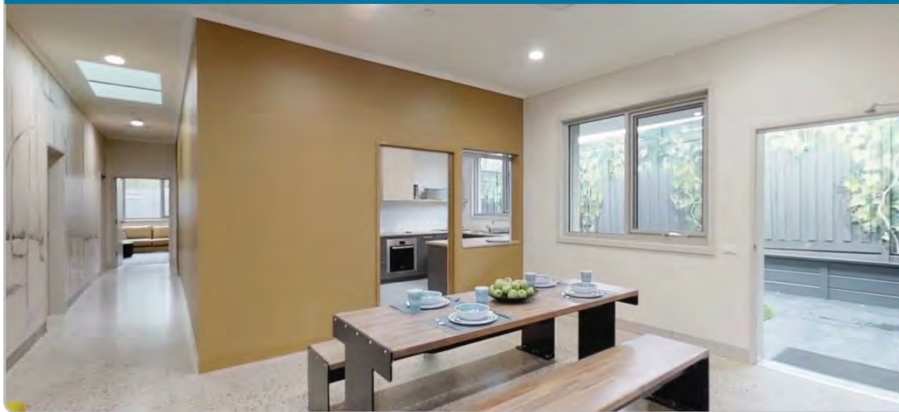
Improved Liveability

SDA



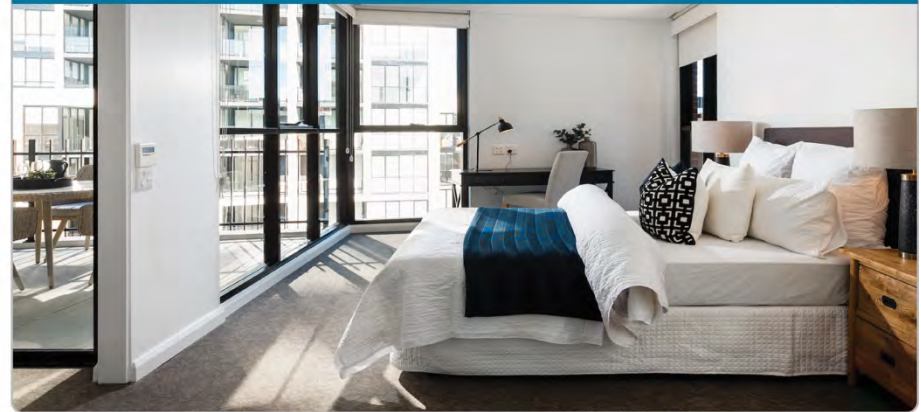
Robust

SDA



Fully Accessible/High Physical Support

SDA



Previous SDA market analyses

The first *Specialist Disability Accommodation – Supply in Australia* report, released by the Summer Foundation in March 2019, identified 1,518 SDA places in the development pipeline. The report was based on the results of a survey sent to 450 SDA providers in late 2018.

The second *Specialist Disability Accommodation – Supply in Australia* report was released by the Summer Foundation and Social Ventures Australia in March 2020. It identified 1,766 SDA places in the development pipeline. The report was based on the results of a survey sent to SDA providers in late 2019.

Key findings of the 2019 survey were:

- Continuing trends identified in 2018, the SDA development pipeline was dominated by High Physical Support designs, while very few Robust category dwellings were being built.
- The most common building types continued to be Apartments and Group Homes.
- Development of SDA in New South Wales continued to outpace other jurisdictions, however data from Queensland and Western Australia indicated increased activity in 2019.
- No SDA pipeline had been identified in the Northern Territory.

Undersupply of SDA places continued to feature in major cities and in some rural areas of South Australia, Western Australia and Tasmania.

The profile of SDA providers and developers has changed between the 2018 and 2019 surveys, with the latter indicating a stronger representation of private developers of SDA.

Approximately three-quarters of survey respondents in 2019 were at least somewhat confident in the SDA supply market with 17% “very confident”. Half the survey respondents planned to build further SDA dwellings beyond their current commitments.

SDA data reported by the NDIA

The National Disability Insurance Agency (NDIA), which administers the NDIS, continues to report quarterly on the number of NDIS participants with SDA funding in their NDIS plan and the number of SDA dwellings enrolled. NDIS Quarterly Reports can be found on the NDIS website.⁷

The NDIS Quarterly Report for September 2020 reported that as at 30 September 2020 15,240 participants had SDA funding (an increase of around 12% on the 13,581 reported at the same time in 2019), while around 4,400 SDA dwellings have been enrolled as SDA (26% increase on 2019), providing over 12,700 SDA places.⁸

The September 2020 quarterly report provided more information on people with SDA in their NDIS plans. The report now features a table that shows the number of people with SDA in their NDIS plan who are living in SDA and those seeking an alternative dwelling or a new dwelling. This data is broken down by SA4 regions and the design category that the participant has funding for.

Data on in-kind SDA (SDA provided by State Governments) was provided for the first time in the September 2020 quarterly report. This showed, for example, that there are 203 in-kind dwellings in Tasmania and 853 in Victoria.

The first *Specialist Disability Accommodation – Supply in Australia* report noted limitations with the SDA data reported by the NDIA. As noted above, a number of these limitations have recently been resolved, however the following identified limitations remain relevant:

- The majority of NDIS participants with SDA funding in their plans would likely have transitioned to the NDIS within an existing living arrangement in supported accommodation, often in a group home. These participants automatically had SDA funding included in their plan that reflected their existing living arrangements. With relatively few exceptions, the future housing preferences and reasonable and necessary SDA funding for this population remains unknown.

⁷ NDIA (2020). 'Quarterly Reports.' www.ndis.gov.au/about-us/publications/quarterly-reports

⁸ NDIA (2020). 'SDA Enrolled Dwellings and NDIS Demand Data.' Appendix P, Table P. 4; Table P.6.

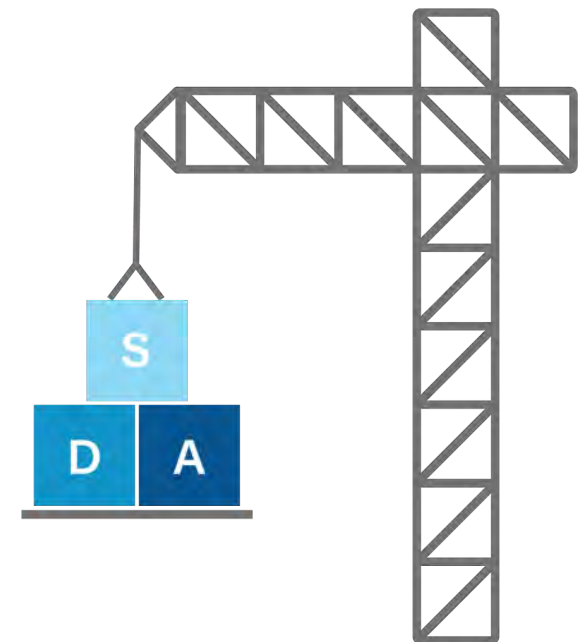
Data available at: data.ndis.gov.au/data-downloads

- While data is now available on the current location of NDIS participants with SDA funding, there is no information on where SDA-funded participants want to live.
- Data about the type of SDA funding participants have (e.g. the Design Category they are funded for) is only available for participants who are seeking housing.

Latest NDIS enrolment data is compared with the latest survey data (September 2020) on pages 57-66 of this report.

Further reading on the SDA market for investors

The Summer Foundation and JBWere have recently released a comprehensive document for those considering investing in SDA, called *Specialist Disability Accommodation (SDA) – Explainer for Investors*.⁹



⁹ Summer Foundation and JBWere (2020), '*Specialist Disability Accommodation (SDA) – Explainer for Investors*' www.summerfoundation.org.au/resources/specialist-disability-accommodation-sda-explainer-for-investors/

SDA Supply Survey

Aim

The aim of this report is to provide a comprehensive summary of SDA supply in Australia. Given the NDIA only provides information on in-kind and enrolled SDA dwellings, information about SDA in development was needed. Therefore, the survey intends to offer an insight of the SDA dwellings in the pipeline within Australia in 2020, as well as provide insights into the experience of SDA providers. This includes their views about the SDA market and plans to develop more SDA dwellings beyond their current pipeline.

Method

The Summer Foundation undertook a survey of SDA providers and developers across Australia that was designed to provide a snapshot of SDA dwellings in the pipeline. The survey was designed using REDCap (Research Electronic Data Capture), a web application for building and managing online surveys and databases (Harris et al., 2009). The previous distribution list for the survey was updated from multiple sources such as the NDIS list of SDA providers, Housing Hub housing providers, PowerHousing Australia membership and the SDA Alliance membership. The survey link was sent to SDA providers and developers in October 2020 and remained open/active for four weeks. The survey closed on 11 November 2020.

Compared to the previous survey conducted in 2019, several new questions were added to the survey this year to obtain a more comprehensive and holistic understanding of SDA providers and their pipeline of supply. Refer to Appendix A for

a comparison of the content covered in the previous and current survey.

The current survey consisted of five sets of questions: About you; Needs and preferences of people with disability; SDA policy; SDA pipeline; Beyond your current pipeline. Depending on the size of a provider’s pipeline, it was estimated that survey would take 20 minutes to complete. All providers were advised that their responses would be treated strictly commercial-in-confidence would be applied to their responses and that all identifying information would be removed. Providers were given the option to save their responses and return to the survey at a later time if they preferred. Providers and developers who had a large SDA pipeline to report has the option to provide their pipeline data via an Excel spreadsheet. All other sections of the survey (i.e., About you, Needs and preferences of people with disability, SDA policy and Beyond your current SDA pipeline) were completed in REDCap by the majority of providers.

Survey Participation

A summary of the total number of providers who completed each section of the survey is presented in Table 1 below.

Table 2 – Number of providers who completed each section of the survey

<i>Section</i>	<i>Total number of responses</i>
About you	57
Needs and preferences of people with disability	57
SDA policy	56
SDA pipeline	46
Beyond your current pipeline	46

As a total of 57 providers were involved in the survey (refer to Appendix B for a list of these providers who agreed to be named in this report). One provider did not complete the SDA policy section and 11 providers did not complete the Beyond your current pipeline section of the survey. Furthermore, nine providers reported that they did not have a current pipeline and a further two providers did not complete the majority of the questions asked about their pipeline. This resulted in a total of 46 providers completing the SDA pipeline section of the survey. It is important to note that the pipeline data from the previous survey was included in the current report, only if it wasn’t reported this time and was classified as under development (refer to Appendix C for a detailed description).

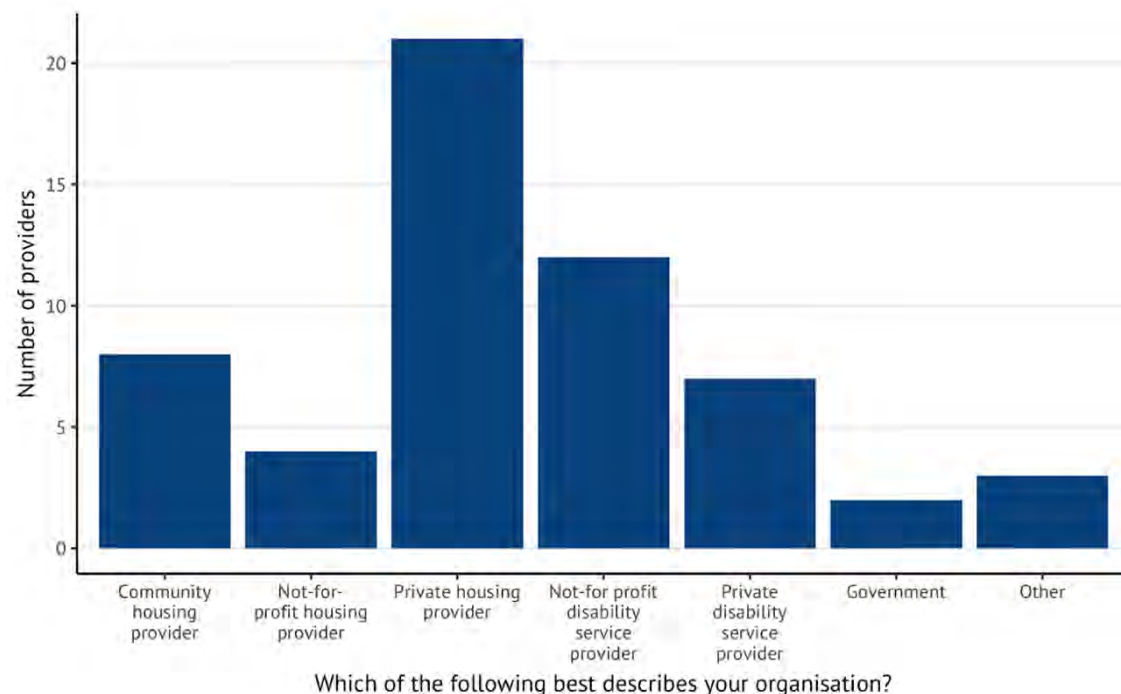
Provider demographics

Within Australia, there are several different types of organisations or individuals providing SDA. Of the providers who participated in this survey, 36.8% were private housing providers, followed by 21.1% not-for-profit disability service providers. There were three providers who selected 'other', for which their responses included 'individual self-provider of SDA', 'property developer' and 'public offer investment fund'. Refer to Figure 1 to for an overview of all provider types.

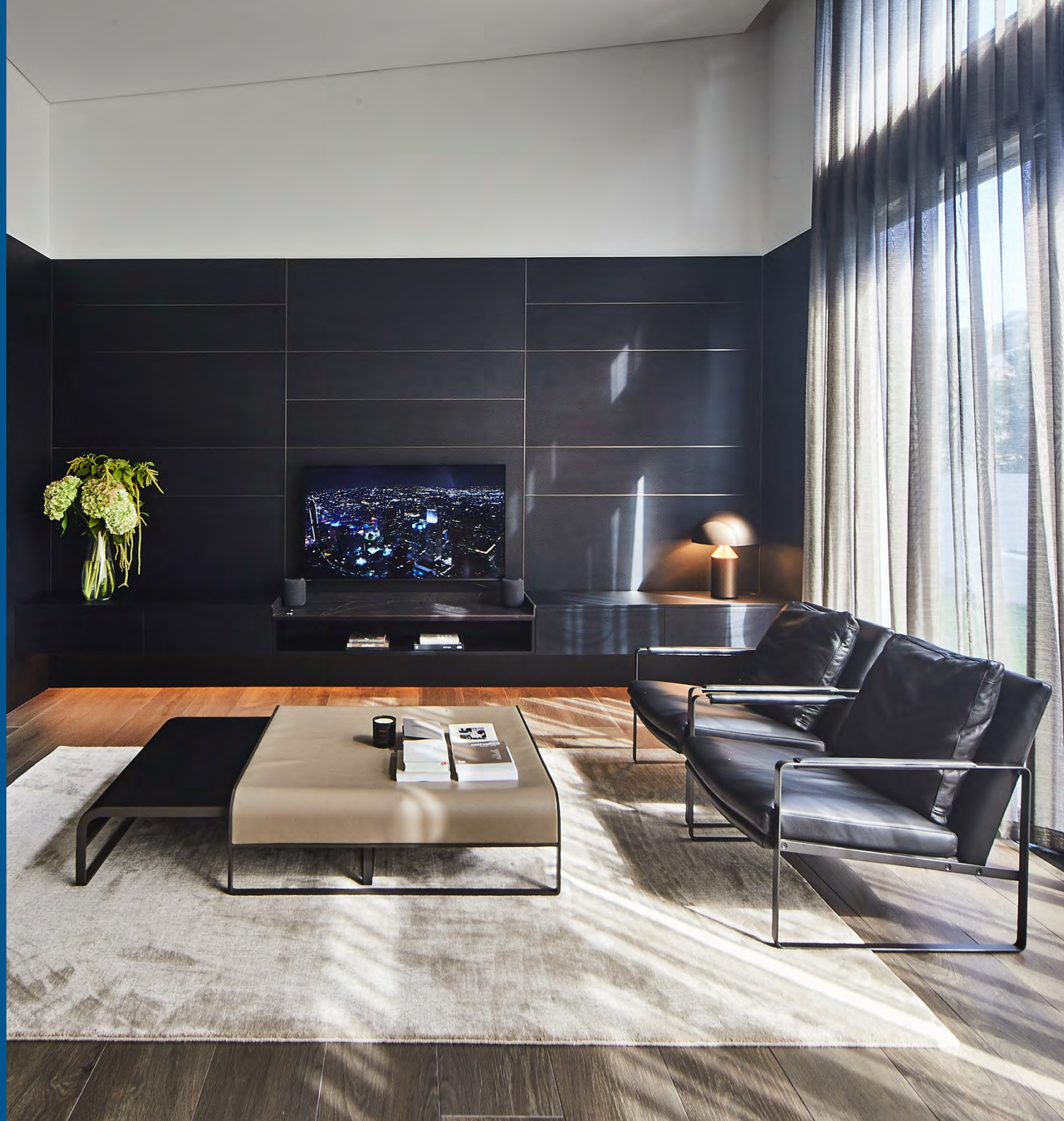
On average, it was identified that the providers involved in this survey had been building SDA dwellings for 22.7 months ($SD = 18.4$).¹⁰

The descriptive analysis for each of the five sections of the survey is discussed below.

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



¹⁰ Data screening for this question revealed that 6 responses which were considered outliers. Given these responses were made by providers who were long-term developers of disability housing, these responses were recoded to the maximum number of months a provider could have been developing SDA. Because new SDA was registered from April 2016, this maximum number of months was 54 months.



About the providers

Engagement of groups

When asked about which groups of people were consulted to inform what building type and design category to build, the majority of providers reported that they engaged with people with disability (82.5%), followed by support providers (66.7%) and support coordinators (64.9%). The same trend was found for engagement of groups to inform the location of the build, with people with disability (77.2%) consulted with the most, followed by support providers (68.4%) and support coordinators (63.2%) respectively. Peak bodies were the group that were consulted with the least to inform building type and design category (28.1%) and also the location of the build (21.1%).

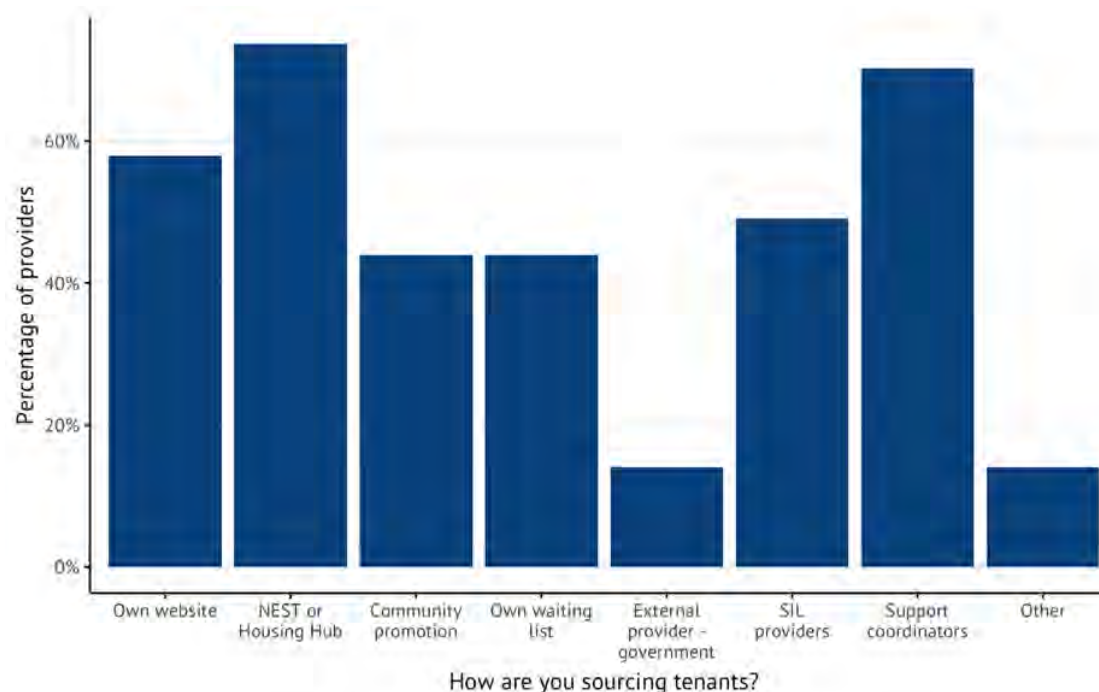
The findings also reveal that providers do not commonly rely on one group of people to inform decisions about building type, design category and the location of the build. In fact, providers, consulted with three different groups of people on average ($SD = 1.2$, $n = 57$). This finding may suggest that providers are attempting to gain a holistic understanding of what to build (i.e., building type and design category) and where to build it to meet demand more accurately.



Strategies for sourcing tenants

The most common strategy used for sourcing tenants was via the Housing Hub and Nest (73.7%), closely followed by support coordinators (70.2%). Again, more than one strategy was typically used, with providers reporting, on average, utilising 3.7 strategies ($SD = 1.7$, $n = 57$) to fill their SDA vacancies. Refer to Figure 2 for an overview of all strategies reported.

Figure 2 – Strategies used by SDA providers ($n = 57$) to source tenants



Note: Providers could select multiple strategies.

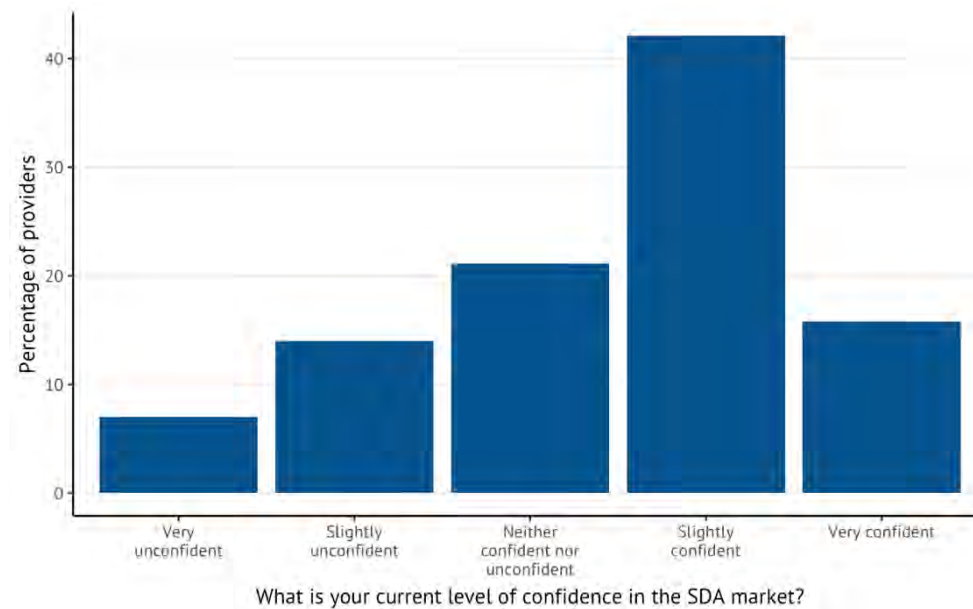
Confidence in the SDA market

As can be seen in Figure 3, more than half of the providers reported that they were slightly confident (42.1%) or very confident (15.8%) in the SDA market, followed by 21.1% of providers reporting they were neither confident or unconfident. These findings are in line with what was reported in the previous survey, suggesting no change in SDA market confidence over the past 12 months.

Management of SDA properties

Consistent with the previous survey, almost two-thirds of providers indicated that their organisation managed SDA properties (64.9%) and a further 17.5% of providers indicated that even though they do not manage properties at the moment, they would like to in the future.

Figure 3 – Provider confidence in the SDA



Separation of housing and support services

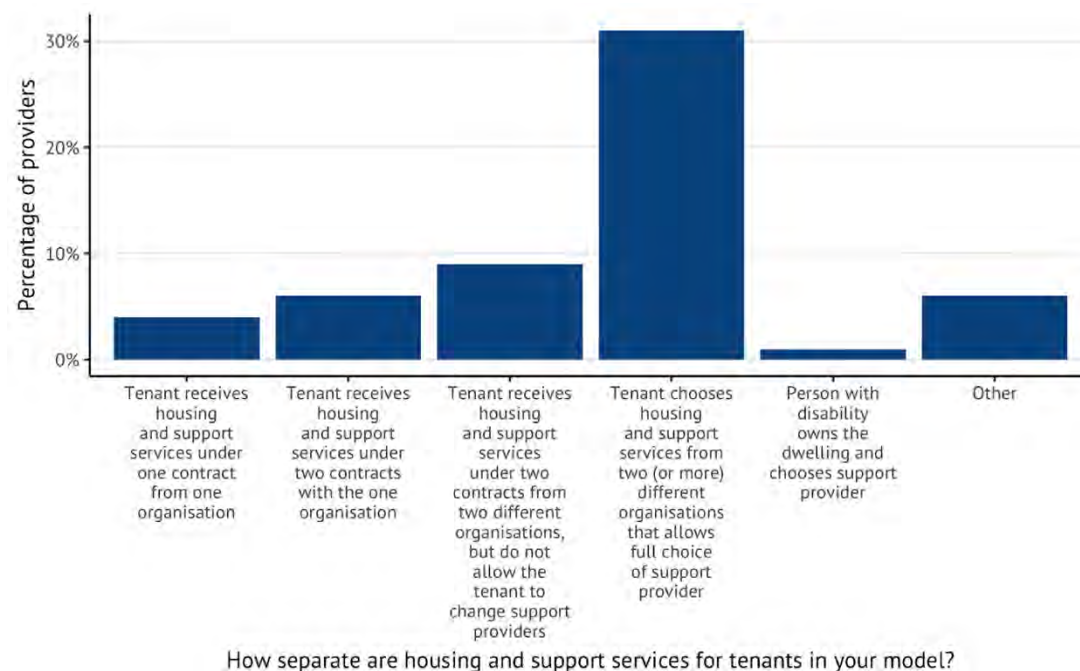
Separation of housing and support services enables choice and control for SDA tenants, giving people the freedom to choose and change support providers without changing their dwelling. The aim of this question in the survey was to explore the range of models for separation currently in use.

Consistent with the previous survey, slightly more than half of the providers (54.4%) indicated that their tenants chose housing and support services from two or more organisations. In contrast, 7% of providers indicated that their tenants received housing and support services under one contact from one organisation. Refer to Figure 4 for all models reported.

The National Disability Insurance Scheme (NDIS) Quality and Safeguards Commission (2020) noted that “each participant’s right to exercise choice and

control over other NDIS support provision is not limited by their choice of specialist disability accommodation dwelling” (p.38). With 33% of providers indicating that their tenants’ choice of supports is in some way limited, the findings of the current report suggest that more separation of housing and support services still needs to occur to align with NDIA policy.

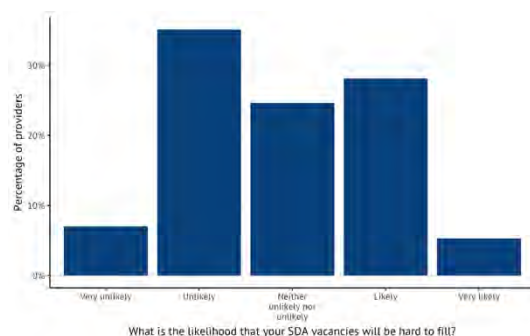
Figure 4 – Models for separation of housing and support services (*n* = 57)



Filling SDA vacancies

When asked whether SDA vacancies will be hard to fill, 35.1% of providers indicated that they would be unlikely to experience difficulty filling their vacancies, with a further 24.6% of providers indicating that it would be neither unlikely nor likely. This contrasts with results from the previous survey, which found that almost 50% of providers thought it would be likely or very likely to have difficulty filling their vacancies, the findings of this report indicate that this perception has improved.

Figure 5 – Providers perception of the likelihood that their SDA vacancies will be hard to fill ($n = 57$)

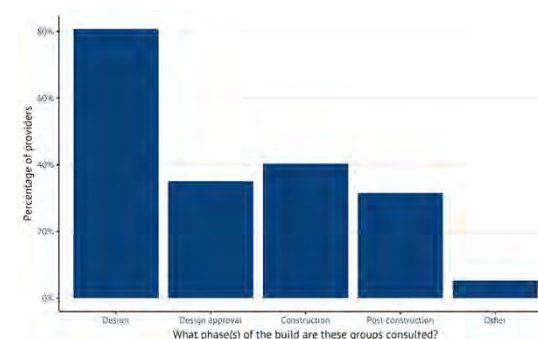


Groups consulted in the design phase

On average, providers reported consulting with 2.5 different groups of people during the design phase ($SD = 1.0$, $n = 57$). Similar to the previous report, the main groups that were consulted were people with disability (77.2%), SIL providers (68.4%) and family/carers (64.9%). A minority (35.1%) of providers reported consulting support coordinators, SDA assessors, design consultants/ architects and other SDA housing providers. Consultation with people with disability remains paramount to developing SDA that meets the needs of tenants.

Consistent with results of the previous survey, the current survey also indicated that providers typically engaged these groups of people across multiple phases of the build (i.e., not just the design phase; $M = 2.1$, $SD = 1.1$, $n = 57$), including the construction phase (40.4%), design approval phase (35.1%) and post construction phase (31.6%). Refer to Figure 6 below.

Figure 6 – The build phase for which SDA providers ($n = 57$) sought consultation

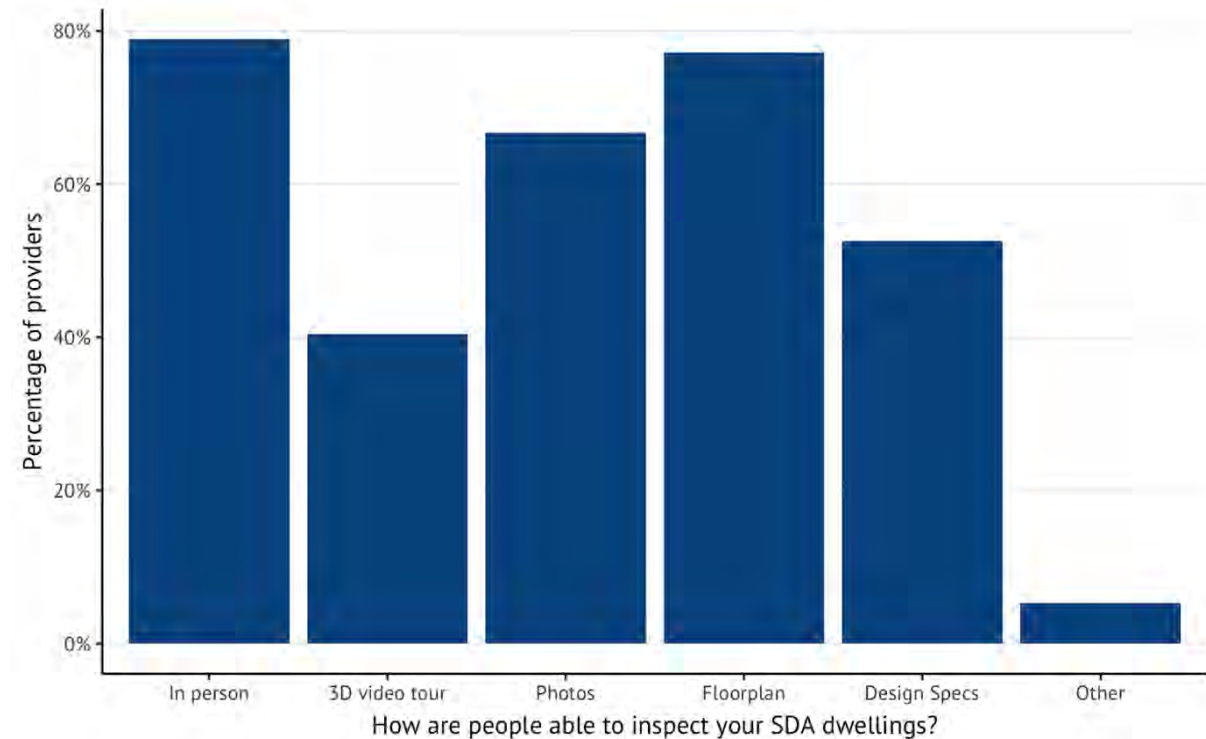


Note: Providers could select multiple phases.

Dwelling inspections

New to the current report was exploring the methods used by providers for inspection of their SDA dwellings. On average, it was found that providers used 3.5 different strategies ($SD = 1.4$), with inspecting the dwelling in person (78.9%) the most commonly reported, followed by floorplans (77.2%), photos (66.7%), design specs (52.6%), and 3D video tours (40.4%; Figure 7). Covid-19 has impacted some people's ability to inspect dwellings, particularly in Victoria. This has led to an increased use of technology in a range of formats to engage potential tenants.

Figure 7 – Methods used by SDA providers ($n = 57$) for inspection of their dwellings



Note: Providers could select multiple methods.

Needs and preferences of people with disability

New to the current report was a section about understanding the needs and preferences of people with disability. Providers were asked to indicate, on a scale of 1 – 5 (where 1 = strongly disagree and 5 = strongly agree) how much they agree with the statement “I understand the needs and preferences of people with disability”. Findings revealed that overall, providers tended to agree with this statement ($M = 4.0$, $SD = 1.1$, $n = 57$).



Providers were also asked what resources were used to help them understand these needs and preferences. The findings indicated that on average, providers used 1.4 resources to aid their understanding ($SD = 0.6$, $n = 57$), with the Housing Hub (59.6%) used the most. This resource was then followed by ‘other’ (42.1%; NDIS Participants and their family/caregivers, SIL providers, support providers), and the Housing Hub’s needs and preferences tool (29.8%). A total of seven providers reported that they did not use any resources.



Providers were also asked if they had any questions, they would like to ask people with disability in order to better understand their needs and preferences. The purpose of this question was to explore if there were common themes in the type of information needed/wanted by providers, so that these questions could be incorporated into future demand research by the Summer Foundation.

Common questions asked by providers included:

- 'Where would you like to live?'
- 'Do you prefer to live alone or with other people with disability?'
- 'What has worked and what hasn't worked well in other properties you have lived in?'

- 'Do you feel that your support providers are informing and encouraging you to seek alternative purpose-built accommodation?'
- 'What can we provide you to make your life happier and easier in your accommodation?'



SDA policy

Another section which was new to the current report was provider views about SDA policy. On a scale of 1 – 5 (where 1 = very difficult and 5 = very easy) providers were asked to indicate how difficult it has been to ensure that their dwellings meet all of the requirements of the design category and building type in order to enrol the dwelling with the NDIA. On average, providers reported that this has been neither difficult nor easy ($M = 2.9$, $SD = 1.0$, $n = 56$).

The NDIA released Edition 1.1 of the *SDA Design Standards* in October 2019 to codify the requirements SDA dwellings must be met in order to be receive enrolled. These new design standards will come into effect and apply to SDA enrolled after June 2021. The survey responses show that there is a mixed view from developers on whether it will be difficult or easy to implement these standards, indicating developers may still be working through the implications.

Providers were also asked how likely it is that their pipeline of dwellings will accommodate the NDIA policy change of allowing family members to live together, where 1 = very unlikely and 5 = very likely. Findings revealed that, on average, providers were likely to accommodate this change ($M = 3.9$, $SD = 1.1$, $n = 56$).

This is a positive step as providers are key to enabling this new policy to become a reality in the market. This change is an improvement to the SDA framework in allowing NDIS participants an ordinary life and choice over who they live with.



SDA supply pipeline

The pipeline data presented in this section is based on the responses of 56 SDA developers for which there was estimated to be 1324 dwellings in development or an estimated total of 1817 SDA places. This is equivalent to an average of 1.4 SDA residents per – refer to Appendix C for a detailed account of the data screening which took place for this section. Note that as per the previous survey, completed dwellings which had already been enrolled with the NDIA were excluded from the analysis and thus, not included in the current report.¹¹ This is to avoid duplication with what is already published by the NDIA.

All dwellings reported for each of the following stages of development were included:

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

¹¹ This data will be analysed at a later point and included in a separate report with the aim to extend upon the information about enrolled dwellings reported by the NDIA.

National Overview



Maximum number of residents

As can be seen in Table 2 below, more than three quarters (77.6%) of the estimated number of dwellings in the pipeline around Australia will accommodate a maximum number of one resident. This indicates that the SDA market is moving away from larger

settings that accommodate multiple residents such as group homes, and is instead beginning to focus on building SDA in smaller settings. This shift is a positive step in fostering greater independence for people with disability and subsequently, has been shown to lead to many positive outcomes such as enhanced quality of life (see Oliver et al., 2020 for a review).

Table 3 – Number and percentage (%) of SDA dwellings and places in Australia by the maximum number of residents

<i>Maximum number of residents</i>	<i>Dwellings</i>	<i>% of dwellings</i>	<i>Places</i>	<i>% of places</i>
1	1027	77.6	1027	56.5
2	138	10.4	276	15.2
3	126	9.5	378	20.8
4	29	2.2	116	6.4
5	4	0.3	60	1.1

Location

A total of seven states and territories were reported as locations where SDA dwellings are currently being built. These were: New South Wales (NSW); Victoria (VIC); Queensland (QLD); Western Australia (WA); South Australia (SA); Tasmania (TAS); Australian Capital Territory (ACT).

More than half of the SDA places in the national SDA pipeline are being built in Queensland (28.6%) and Victoria (26.3%).

These states were followed by New South Wales wherein 24.2% of SDA places are in development. As can be seen in Table 3, Tasmania has the least amount of places in the pipeline; accounting for only 0.1% of the overall national total.

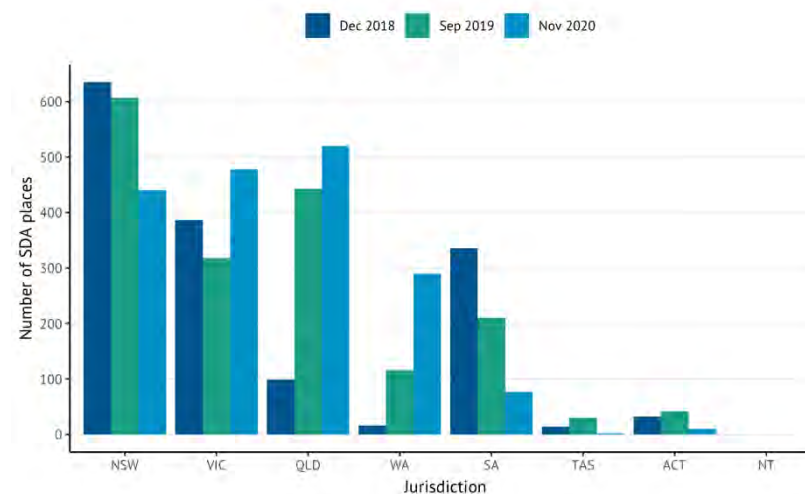
In comparison to the previous supply report, these findings show that there is a more even spread of development activity across New South Wales, Victoria and Queensland rather than most occurring in one state (i.e., New South Wales).

However, similar to the previous report, there was no reported development activity in Northern Territory. The findings of the current report highlight the dynamic and evolving nature of the SDA market and suggest that whilst growth is still clearly needed, supply is becoming more established across Australia. Refer to Figure 8 below for a comparison of SDA places in the pipeline across the 2018, 2019 and current supply survey.

Table 4 – Number and percentage (%) of dwellings and places by states and territories

State	Dwellings	% of dwellings	Places	% of places
NSW	288	21.8	440	24.2
VIC	367	27.7	478	26.3
QLD	366	27.6	520	28.6
WA	299	17.3	290	16.0
SA	62	4.7	77	4.2
TAS	2	0.2	2	0.1
ACT	10	0.8	10	0.6
NT	0	0	0	0

Figure 8 – A comparison of SDA places in development over time



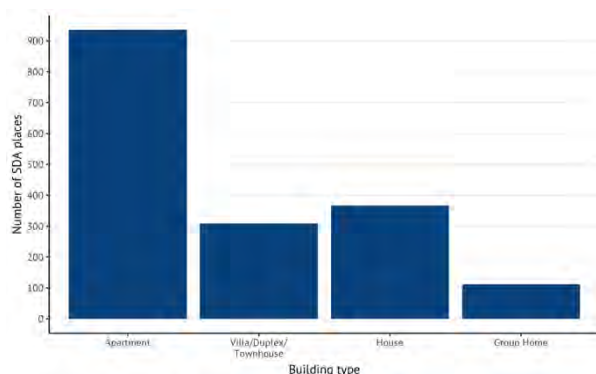
Note: December 2018 (n = 1518 places), September 2019 (n = 1766 places and November 2020 (n = 1817 places).

Building type

The NDIS provides funding for SDA on the basis of specified building types (National Disability Insurance Agency [NDIA], 2020). These building types include apartments, villa/duplex/townhouses, houses, and group homes.

Figure 9 shows the estimated number of SDA places reported by building type across Australia. As can be seen, apartments account for most of the SDA places (936; 54.3%), followed by

Figure 9 – Estimated number of SDA places by building type across Australia



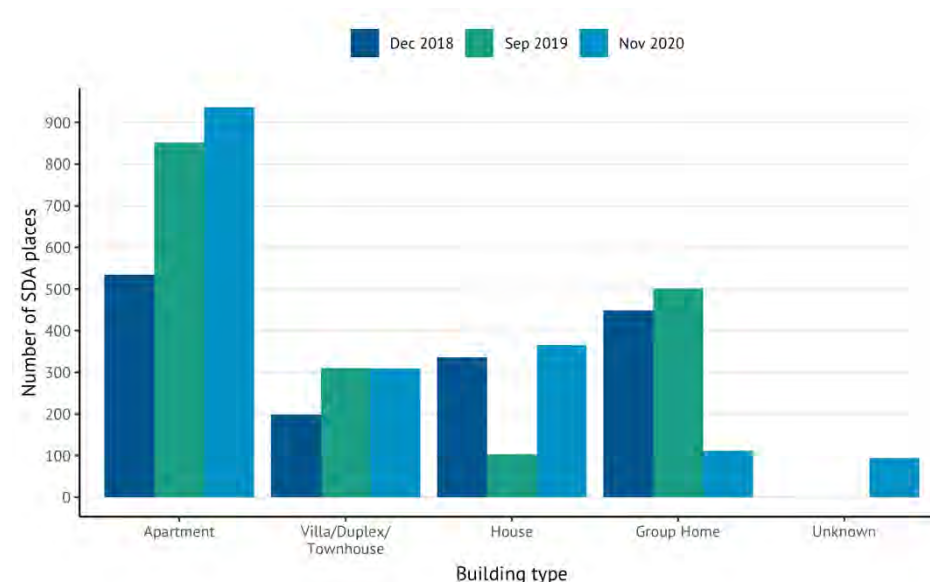
Note: Building type was not reported for 91 dwellings and 94 SDA places.

houses (366; 21.2%), villa/duplex/townhouses (309; 17.9%), and group homes (112; 6.5%).

Compared with the previous survey (Figure 10), the most notable difference is in relation to group homes, with a sizeable decrease of approximately 389 SDA places this year. This finding is in line with Table 2 and provides a further

indication that the SDA market is progressing away from larger settings that accommodate groups of residents to smaller settings.

Figure 10 – A comparison of SDA places in development by building type over time



Note: December 2018 (n = 1518), September 2019 (n = 1766) and November 2020 (n = 1817).

A similar trend for building type was found across states and territories. Specifically, as can be seen in Figure 11, apartments are the dominant building type reported for new SDA across all jurisdictions except New South Wales. Within New South Wales, houses account for slightly more SDA places than any other building type. However, it is interesting to note that in comparison to the previous report, more apartments are in development across every jurisdiction except the Australian Capital Territory, New South Wales and South Australia. This clear preference of many SDA providers to build apartments may reflect that this building type utilises land most effectively and so, is more financially viable in comparison to other building types.

A more detailed snapshot of the estimated number of SDA places reported by building type is provided in Table 4.

Figure 11 – Estimated number of SDA places across building type for each jurisdiction

Jurisdiction	Building type				
	Apartment	Group Home	House	Villa/Duplex/Townhouse	
	NSW	112	35	139	94
	VIC	214	25	98	111
	QLD	386	12	94	28
	WA	149	40	35	62
	SA	63	0	0	14
	TAS	2	0	0	0
	ACT	10	0	0	0

Note: Building type for 94 SDA places was not reported.

Table 5 – Number and percentage (%) of dwellings and places by building type (granular breakdown)

<i>Building Type</i>	<i>Dwellings</i>	<i>% of dwellings</i>	<i>Places</i>	<i>% of places</i>
Apartment, 1 bedroom, 1 resident	427	34.6	427	24.8
Apartment, 2 bedrooms, 1 resident	317	25.7	328	19.0
Apartment, 2 bedroom, 2 residents	55	4.5	112	5.5
Apartment, 3 bedroom, 2 residents	39	3.2	69	4
Group home, 4 residents	27	2.2	108	6.3
Group home, 5 residents	4	0.3	20	1.2
House, 2 residents	36	2.9	68	3.9
House, 3 residents	94	7.6	282	16.4
Villa/Duplex/Townhouse, 1 resident	191	15.5	191	11.1
Villa/Duplex/Townhouse, 2 residents	13	1.1	28	1.6
Villa/Duplex/Townhouse, 3 residents	30	2.4	90	5.2

Note: Building type was not reported for 91 dwellings and 94 SDA places.

In the REDCap survey, there was an option for 'other' building type to be selected. The responses given by some providers were:

- Apartment, 3 bedrooms, 1 resident
- Apartment, 4 bedrooms, 1 resident
- House, 1 resident
- House, 4 residents

Given the above responses do not exist in the SDA price guide, however, they were recoded to the most likely category that does exist in the price guide. This highlights that misconceptions exist about the SDA price guide and suggests some providers need more clarity about what dwelling types can be enrolled with the NDIA. Specifically:

- Apartment, 3 bedrooms, 1 resident was recoded to Apartment, 3 bedrooms, 2 residents
- Apartment, 4 bedrooms, 1 resident was recoded to Apartment, 3 bedrooms, 2 residents
- House, 1 resident was recoded to House, 2 residents
- House, 4 residents was recoded to Group home, 4 residents.

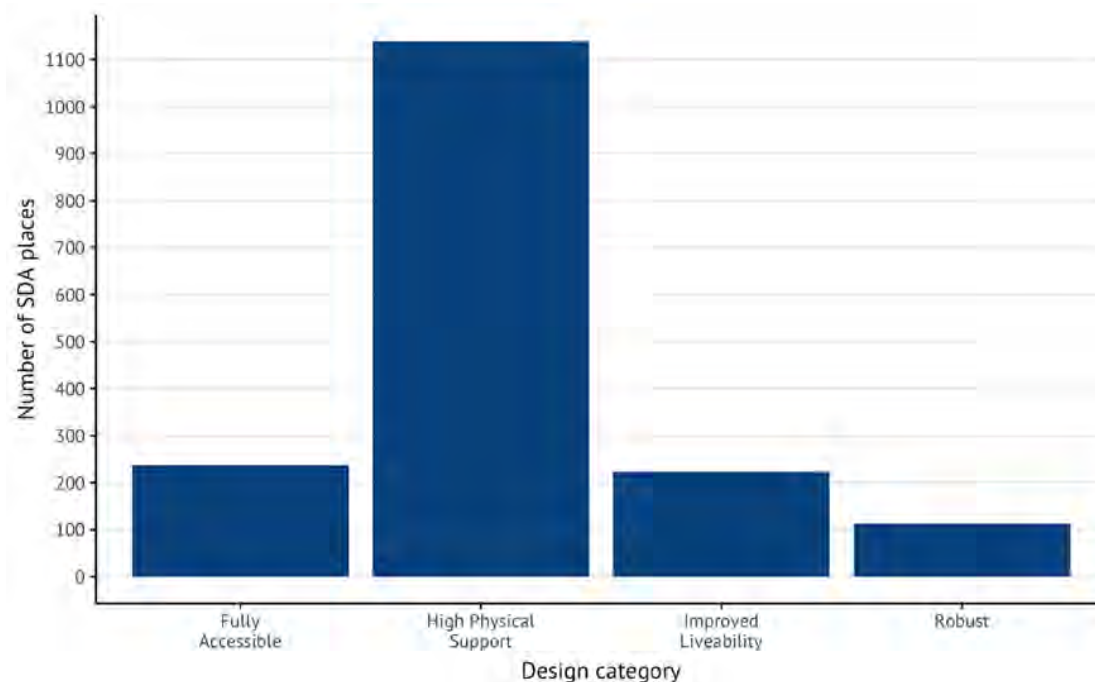
In line with the findings about building type reported above, Table 4 shows that one-bedroom apartments for one SDA resident is the preferred build type by many providers across Australia, accounting for 24.8% of SDA places in the current pipeline. This is then followed by two-bedroom apartments for one SDA resident (19.0%). This finding may indicate that the SDA market is responding to the need for more storage space for storage equipment and consumables by SDA residents and/or the desire for residents to reside with other family members.

Design category

The NDIS provides funding for SDA on the basis of specified design categories (NDIA 2020). The design categories for new SDA properties are: Fully Accessible, High Physical Support, Improved Liveability and Robust.

Figure 12 shows the estimated number of SDA places reported by design category across Australia. As can be seen, High Physical Support dwellings account for approximately two thirds of SDA places (1139; 66.5%), followed by Fully Accessible (237; 13.8%), Improved Liveability (223; 13.0%) and Robust (113; 6.6%).

Figure 12 – Estimated number of SDA places by design category across Australia



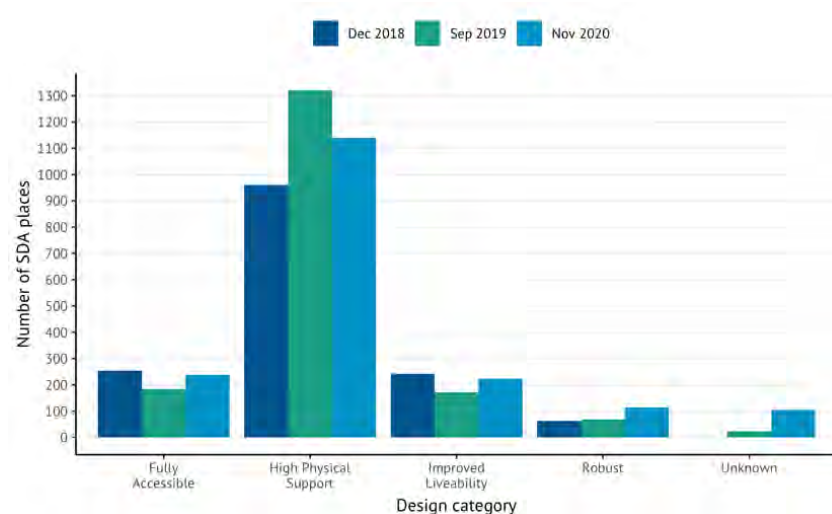
Note: SDA design category was not reported for 101 dwellings and 95 SDA places.

However, as can be seen in Figure 13, the number of High Physical Support SDA places across Australia has decreased slightly in comparison to the previous survey and all other design categories have increased compared to previous surveys.

A similar trend for design category was found across states and territories. Specifically, as can be seen in Figure 14, the findings reveal that high physical support is the predominant design category across all jurisdictions except

Tasmania (which had one High Physical Support dwelling and one Improved Liveability dwelling). Figure 14 also shows is that Robust remains the least common design category in all jurisdictions except Victoria – this is discussed further on page 41.

Figure 13 – A comparison of SDA places in development by design category over time



Note: December 2018 (n = 1518 places, September 2019 (n = 1766) and November 2020 (n = 1817 places).

Figure 14 – Estimated number of SDA places across design category for each jurisdiction

Jurisdiction	Design category			
	Fully Accessible	High Physical Support	Improved Liveability	Robust
NSW	60	151	120	44
VIC	94	266	35	53
QLD	24	424	47	15
WA	37	236	16	1
SA	22	51	4	0
TAS	0	1	1	0
ACT	0	10	0	0

Note: Design category was not reported for 101 dwellings and 105 SDA places.

Building type and design category

Within Australia, there are a large proportion of estimated SDA places for High Physical Support apartments, followed by High Physical Support houses, Fully Accessible Apartments, and High Physical Support villa/duplex/townhouses. Refer Figure 15.

Figure 15 – Estimated number of SDA places across building type and design category in Australia

	Design category			
	Fully Accessible	High Physical Support	Improved Liveability	Robust
Building type				
Apartment	158	699	69	0
Villa/Duplex/Townhouse	57	137	68	47
House	10	224	82	50
Group Home	12	79	0	16

Note: Building type and design category was not reported for 109 SDA places.

¹² This is not applicable to apartments

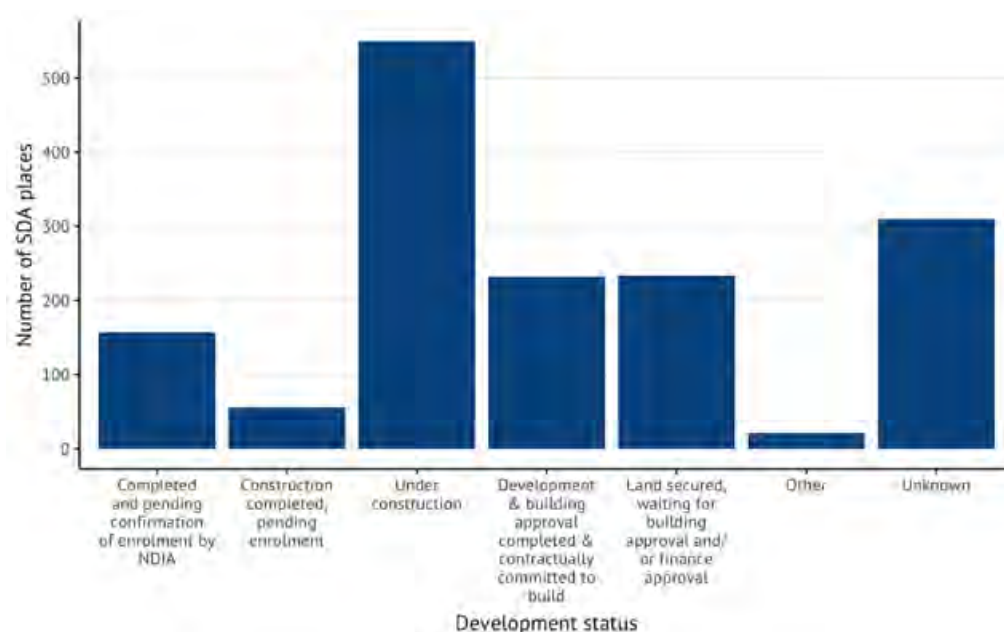
Similar to the previous report, High Physical Support category dwellings continue to dominate the development pipeline for SDA. However, unlike the previous report, there is a considerable decline in the number of SDA places in group homes, across all design categories. The most sizable difference noted was High Physical Support group homes, with an estimated decrease of 335 places over the past twelve months across Australia. Again, this indicates that the SDA market is continuing to evolve, enabling people with disability to have greater independence.

Another notable difference is in relation to the Robust design category. That is, in comparison to the previous report, there are more Robust places in development across all build types except group homes.¹² Whilst this is a positive step, there has been a consistent trend over the past three years for Robust SDA places to be the least commonly reported design category. This suggests that barriers for SDA providers to build more robust dwellings exist. Some of these barriers may include perceptions about Robust tenants and their needs, as well as challenges with the financial model for Robust dwellings in capital cities. It is clear that further action to increase supply of Robust SDA dwellings is warranted.

Stage of new SDA development

Figure 16 illustrates the stage of development for SDA projects in the pipeline, with most activity under construction (550 SDA places; 35.3%), and 465 places yet to begin construction (29.8%).

Figure 16 – Estimated number of SDA places by development status in Australia

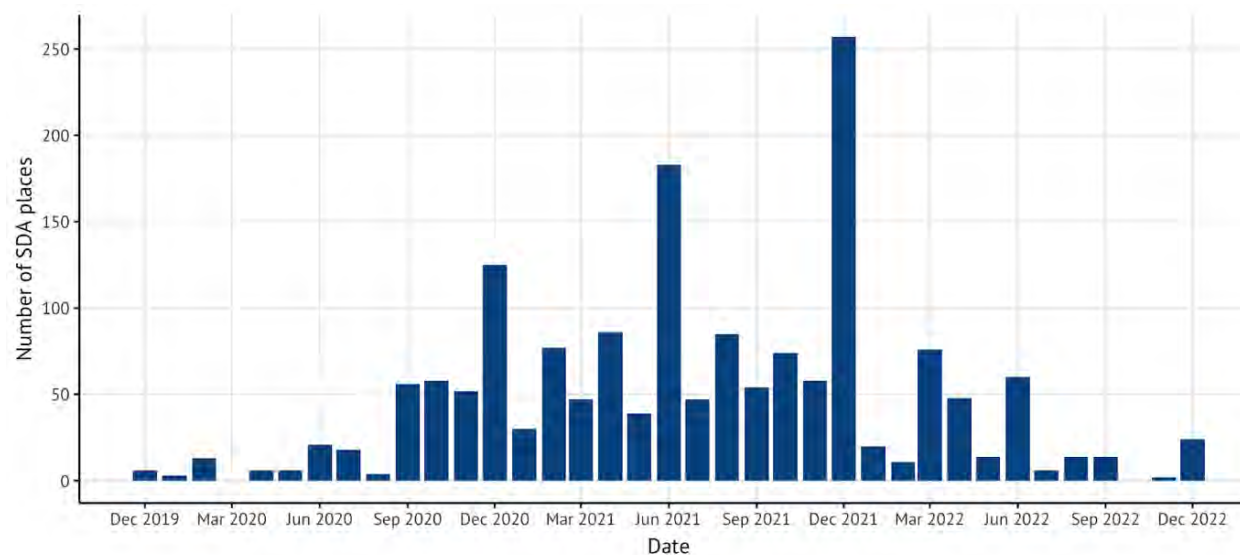


Note: The development status for a total of 206 dwellings and 258 SDA places was not reported. The 310 SDA places that are listed as 'Unknown' are not missing data; rather this category was used to describe properties that were included from the 2019 pipeline data for which the current status is unknown.

Estimated date for occupancy

The findings indicated that most SDA places in pipeline across Australia have an expected occupancy date of mid to late 2021 (1037 SDA places; 61.2% of total pipeline).¹³ Refer to Figure 17.

Figure 17 – Estimated number of SDA places by estimated date of occupancy in Australia



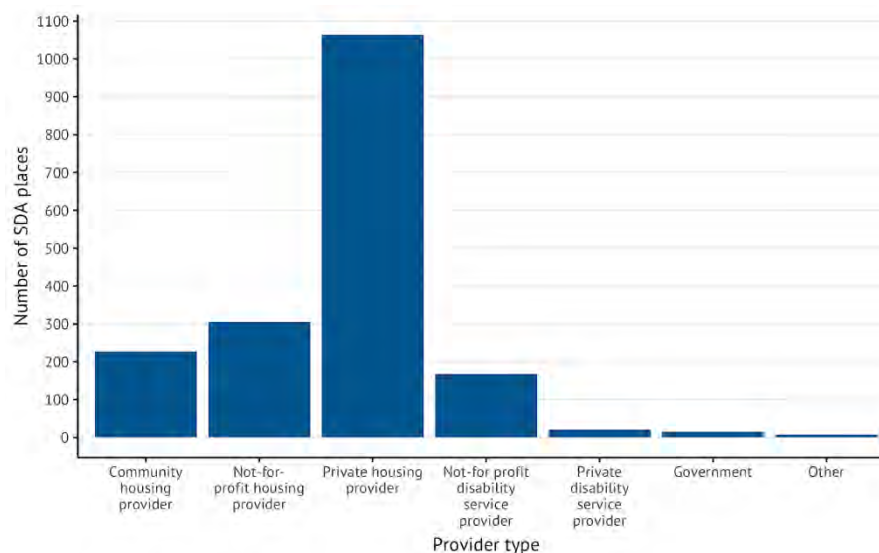
Note: The development status for 111 dwellings and 123 SDA places was not reported

¹³ Estimated date for occupancy should be viewed with caution as the occupancy dates for dwellings reported and carried forward from the previous survey may have changed.

Profile of SDA providers and developers

Figure 18 below provides the latest insights into estimated SDA development activity by provider type and Table 5 presents a comparison of this activity across the 2018, 2019 and current survey.

Figure 18 – Estimated number of SDA places by provider type in Australia



Note: Provider type was not reported for 10 SDA places

Table 6 – A comparison of estimated number of SDA places by provider type over time

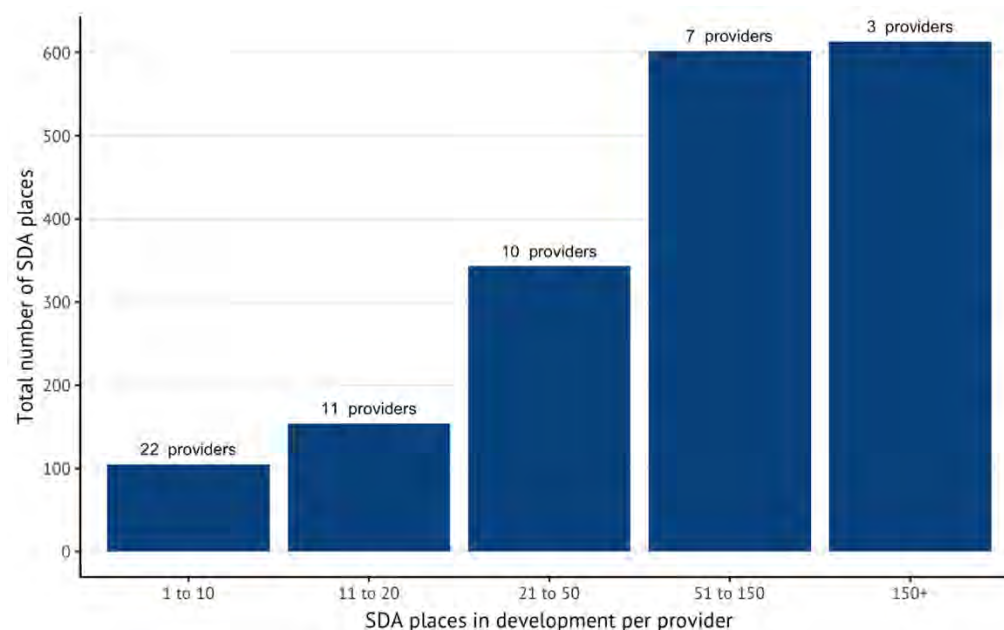
Provider type	Dec 2018	Sep 2019	Nov 2020
Community housing provider	891	502	227
Not-for-profit housing provider	90	404	305
Private housing provider	217	555	1064
Not-for profit disability service provider	234	247	167
Private disability service provider	33	54	21
Government	0	0	15
Other	0	0	8
Prefer not to say	0	0	10
TOTAL	1518	1766	1817

The previous survey, identified that private housing providers, community housing providers and not-for-profit housing providers accounted for the most development activity across Australia. As can be seen in Figure 18 and Table 5, however there has been a decrease in number of SDA places in the pipeline for all provider types except private housing providers, for which activity has almost doubled.¹⁴

Figure 19 illustrates SDA providers by number of SDA places in development. Consistent with the previous survey, three providers reported large amounts of activity, with more than 150 SDA places in development (33.7% of the total pipeline). Interestingly, a number of providers have larger pipelines than last year and appear to be experiencing rapid growth

Only three providers had between 51 and 150 places in development last year, whereas this year there are seven. Together, these providers account for 602 SDA places in development (33.1% of the total pipeline).

Figure 19 – SDA providers by scale of their development activity



¹⁴ Given that many SDA providers and developers did not participate in this survey, please interpret these findings with caution.

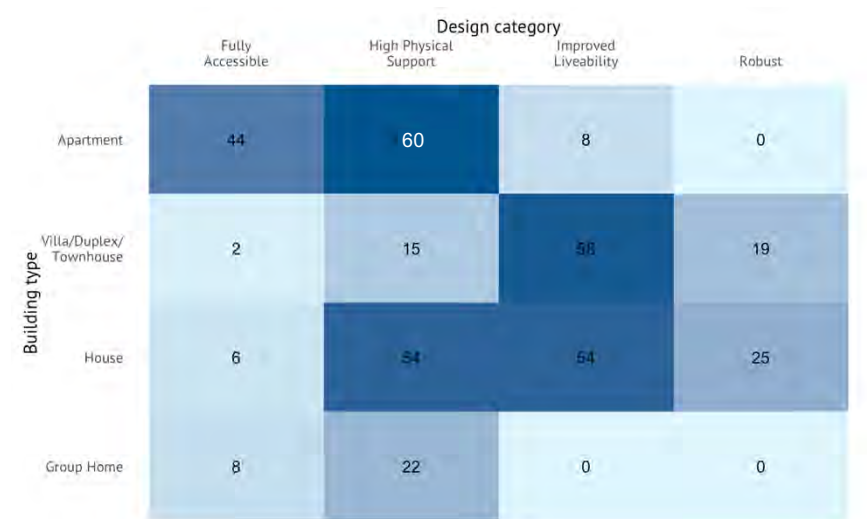
State and Territory Overview

New South Wales



A total of 440 SDA places are reported to be in development in New South Wales – a decline in the number of new places reported to the previous survey (607 places). However, the New South Wales SDA development pipeline has greater diversity in comparison to the previous survey, which was highly dominated by High Physical Support group homes (341 places). This year, there are similar numbers of places across High Physical Support SDA apartments (60 places), High Physical Support houses (54 places), Improved Liveability houses (54 places) and Fully Accessible apartments (44 places). Refer to Figure 20.

Figure 20 – Estimated number of SDA places across building type and design category in New South Wales (*n* = 440)



Note: For NSW, design category and building type were not reported for 65 SDA places.

Interestingly, 40.2% of SDA places in development in New South Wales were reported by private housing providers, followed by community housing providers (31.2%; see Table 6). Almost two thirds (64%) of SDA development in New South Wales is contractually committed to build or is under construction (refer Table 7).

Table 7 – 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	52	18.3	134	31.2
Not-for-profit housing provider	62	21.8	69	16.0
Private housing provider	130	45.8	173	40.2
Not-for profit disability service provider	23	8.1	37	8.6
Private disability service provider	17	6.0	17	4.0

Note: For New South Wales, there was missing data for provider type for a total of 10 SDA places.

Table 8 – Estimated number and percentage (%) of SDA dwellings and places by development status in New South Wales

<i>Development status</i>	<i>Number of Dwellings</i>	<i>% of dwellings</i>	<i>Number of Places</i>	<i>% of places</i>
Completed and pending confirmation of enrolment by NDIA	31	13.7	43	31.2
Construction completed, pending enrolment	5	2.2	15	16.0
Under construction	85	37.4	128	40.2
Development and building approval completed and contractually committed to build	54	23.8	112	8.6
Land secured, waiting for building approval and/or finance approval	20	8.8	38	4.0
Unknown	32	14.1	39	10.4

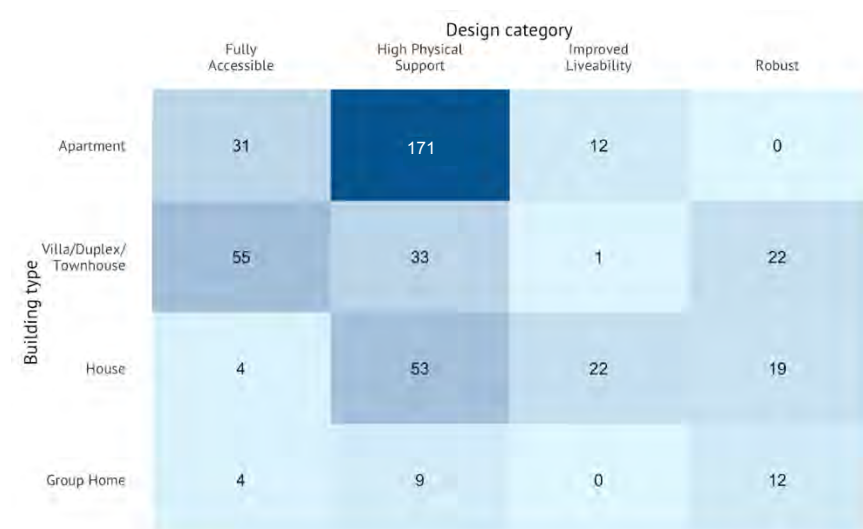
Note: For New South Wales, there was missing data for development status of a total of 61 dwellings and 64 SDA places. The 39 SDA spaces that are listed as Unknown included from the 2019 pipeline data and for which the current development status is unknown.

Victoria



A total of 478 SDA places are reported to be in development in Victoria, an increase in the number of places previously reported (318 places). In comparison to the pipeline reported last year which was dominated by apartments and villas/townhouses, the findings of the current report indicate that more houses are in development across all design categories, including Robust. Refer Figure 21.

Figure 21 – Estimated number of SDA places across building type and design category in Victoria (n = 478)



Note: For Victoria, design category and building type were not reported for 30 SDA places.

As can be seen in Table 8, more than half of the reported SDA places in the Victoria pipeline are being delivered by private housing providers (55.6%), followed by not-for-profit housing providers (17.6%). Almost half (46.2%) of SDA development in Victoria is contractually committed to build or is under construction (refer to Table 9).

Table 9 – Estimated number and percentage (%) of SDA dwellings and places by provider type in Victoria

<i>Provider Type</i>	<i>Number of Dwellings</i>	<i>% of dwellings</i>	<i>Number of Places</i>	<i>% of places</i>
Community housing provider	52	14.2	59	12.3
Not-for-profit housing provider	75	20.4	84	17.6
Private housing provider	202	55.0	266	55.6
Not-for profit disability service provider	27	7.4	50	10.5
Private disability service provider	1	0.3	2	0.4
Government	4	1.1	11	2.3
Other	6	1.6	6	1.3

Table 10 – 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
Completed and pending confirmation of enrolment by NDIA	38	11.3	42	9.4
Construction completed, pending enrolment	18	5.4	21	4.7
Under construction	115	34.2	141	31.6
Development and building approval completed and contractually committed to build	57	17.0	65	14.6
Land secured, waiting for building approval and/or finance approval	72	21.4	93	20.9
Other	6	1.8	17	3.8
Unknown	30	8.9	67	15.0

Note: For Victoria, development status was not reported for 31 dwellings and 32 SDA places. The 67 SDA places that are listed as Unknown are included in the 2019 pipeline data and the current development status is unknown.

Queensland



A total of 520 SDA places are reported to be in development in Queensland, an increase in the number of new places previously reported (443 places). Similar to the previous report, the Queensland SDA development pipeline is dominated by High Physical Support apartments (308 places), with High Physical Support houses (86 places), Improved Liveability apartments (44 places), Fully Accessible apartments (24 places) and High Physical Support villa/duplex/townhouses (22 places) also being reported (see Figure 22)

Figure 22 – Estimated number of SDA places across building type and design category in Queensland ($n = 520$)

	Design category			
	Fully Accessible	High Physical Support	Improved Liveability	Robust
Building type				
Apartment	24	308	44	0
Villa/Duplex/Townhouse	0	22	0	6
House	0	86	3	5
Group Home	0	8	0	4

Note: For Queensland, design category and building type were not reported for 10 SDA places.

Similar to the previous report, 72.7% of SDA places in development in Queensland are being delivered by private housing providers, with most of the remaining development being reported by not-for-profit housing (13.1%) and service providers (12.3%). Many SDA places in development in Queensland are under construction (39.2%), while a further 12.4% are pending confirmation of enrolment by NDIA.

Table 11 – Estimated number and percentage (%) of SDA dwellings and places by provider type in Queensland

<i>Provider type</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Community housing provider	4	1.1	8	1.5
Not-for-profit housing provider	63	17.2	68	13.1
Private housing provider	253	69.1	378	72.7
Not-for-profit disability service provider	45	12.3	64	12.3
Private disability service provider	1	0.3	2	0.4

Table 12 – 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
Completed and pending confirmation of enrolment by NDIA	32	9.2	62	12.4
Construction completed, pending enrolment	8	2.3	18	3.6
Under construction	140	40.5	196	39.2
Development & building approval completed & contractually committed to build	12	3.5	16	3.2
Land secured, waiting for building approval and/or finance approval	33	9.5	41	8.2
Unknown	121	35.0	167	33.4

Note: For Queensland, development status was not reported for 20 dwellings and 20 SDA places. The 167 SDA spaces that are listed as Unknown are properties that were included from the 2019 pipeline data and the current development status is unknown.

Western Australia



A total of 290 SDA places are reported to be in development in Western Australia, more than double the number previously reported (116 places). The Western Australia SDA development pipeline is again dominated by High Physical Support apartments (108 places). However, unlike last year, there are increases in High Physical Support SDA places across all building types, particularly villa/duplex/townhouses (57 places) and group homes (40 places). Only one Robust SDA place was reported (see Figure 23)

Figure 23 – Estimated number of SDA places across building type and design category in Western Australia (*n* = 290)

		Design category			
		Fully Accessible	High Physical Support	Improved Liveability	Robust
Building type	Apartment	37	108	4	0
	Villa/Duplex/ Townhouse	0	57	5	0
	House	0	31	3	1
	Group Home	0	40	0	0

Note: For Western Australia, design category and building type were not reported for a total of 4 SDA places.

The majority (85.2%) of SDA places in development in Western Australia are being delivered by private housing providers, followed by not-for-profit housing providers (11.0%). Most SDA development reported in Western Australia is either waiting for building approval and/or finance approval (36.2%) or is contractually committed to build (26.2%).

Table 13 – Estimated number and percentage (%) of SDA dwellings and places by provider type in Western Australia

<i>Provider type</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Community housing provider	7	3.1	7	2.4
Not-for-profit housing provider	32	14.0	32	11.0
Private housing provider	186	81.2	247	85.2
Government	4	1.7	4	1.4

Table 14 – 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
Completed and pending confirmation of enrolment by NDIA	10	7.4	10	6.7
Construction completed, pending enrolment	1	0.7	2	1.3
Under construction	33	24.4	33	22.1
Development & building approval completed & contractually committed to build	35	25.9	39	26.2
Land secured, waiting for building approval and/or finance approval	45	33.3	54	36.2
Other	4	3.0	4	2.7
Unknown	7	5.2	7	4.7

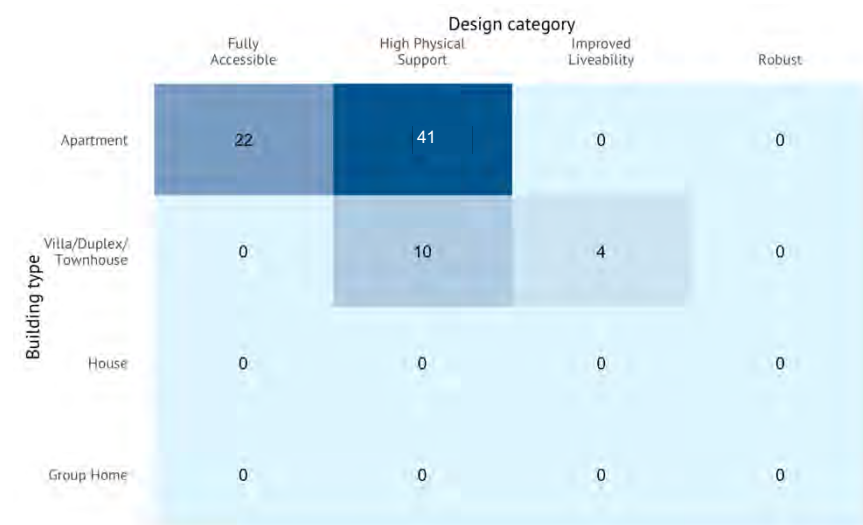
Note: For Western Australia, development status was not reported for 94 dwellings and 141 SDA places. The 7 SDA spaces that are listed as Unknown are properties that were included from the 2019 pipeline data and the current development status is unknown.

South Australia



A total of 77 SDA places are reported to be in development in South Australia, a considerable decrease compared to what was previously reported (210 places). Interestingly, similar to the previous report, the South Australia SDA development pipeline only includes apartments and villa/duplex/townhouses across the fully accessible, High Physical Support and Improved Liveability design categories. Refer Figure 24. No houses or group homes have been reported, nor any robust SDA places in the 2019 and 2020 SDA pipeline.

Figure 24 – Estimated number of SDA places across building type and design category in South Australia (n = 77)



More than half (54.5%) of the SDA places in development in South Australia are being delivered by not-for-profit housing providers (54.5%), with the remaining development being reported by community housing providers (24.7%) and not-for-profit disability service providers (20.8%). More than half (54.5%) of the SDA development in South Australia is under construction.

Table 15 – Estimated number and percentage (%) of SDA dwellings and places by provider type in South Australia

<i>Provider type</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Community housing provider	10	16.1	19	24.7
Not-for-profit housing provider	42	67.7	42	54.5
Not-for-profit disability service provider	10	16.1	16	20.8

Table 16 – Estimated number and percentage (%) of SDA dwellings and places by development status in South Australia

<i>Development status</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Under construction	42	67.7	42	54.5
Land secured, waiting for building approval and/or finance approval	5	8.1	5	6.5
Unknown	15	24.2	30	39.0

Note: The 30 SDA spaces that are listed as Unknown are properties that were included from the 2019 pipeline data and the current development status is unknown.

Tasmania



A total of two SDA places are reported to be in development in Tasmania; a notable decline compared to what was previously reported (30 places). The Tasmanian SDA pipeline comprises one High Physical Support apartment and one Improved Liveability apartment. No other building types or design categories were reported. Refer to Figure 25.

Figure 25 – Estimated number of SDA places across building type and design category in Tasmania (*n* = 2)

	Design category			
	Fully Accessible	High Physical Support	Improved Liveability	Robust
Building type	Apartment	1	1	0
	Villa/Duplex/Townhouse	0	0	0
	House	0	0	0
	Group Home	0	0	0

The two SDA places are being developed by a provider who selected 'other' for provider type and did not specify which type. The two SDA places are waiting for building approval and/or finance approval.

Table 17 – Estimated number and percentage (%) of SDA dwellings and places by provider type in Tasmania

<i>Provider type</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Other	2	100	2	100

Table 18 – Estimated number and percentage (%) of SDA dwellings and places by development status in Tasmania

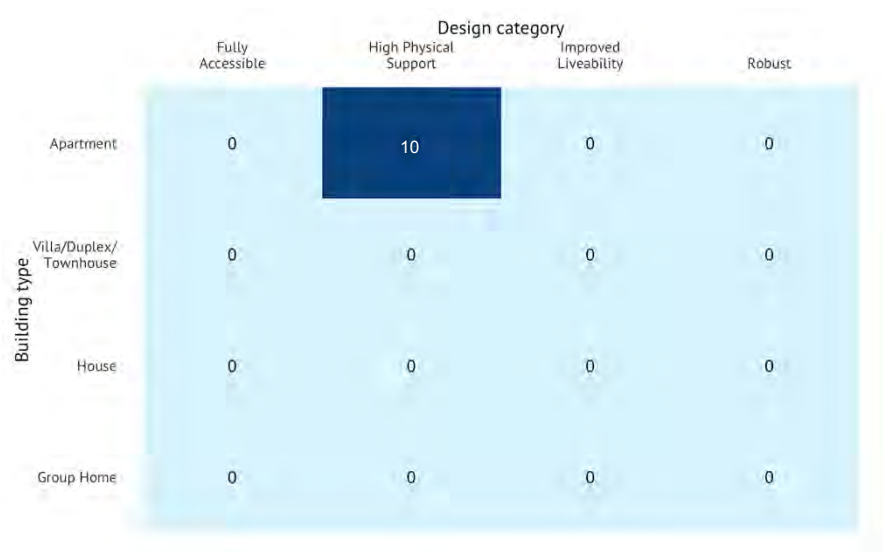
<i>Development status</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Land secured, waiting for building approval and/or finance approval	2	100	2	100

Australian Capital Territory



A total of 10 SDA places are reported to be in development in the Australian Capital Territory; a decrease compared with what was previously reported (42 places). Similar to the previous report, the Australian Capital Territory SDA development pipeline comprises High Physical Support SDA places only. Last year, reported places were split across apartments and villa/duplex/ townhouses whereas this year; there are apartments only (see Figure 26). No houses or group homes were reported.

Figure 26 – Estimated number of SDA places across building type and design category in Australian Capital Territory (*n* = 10)



All SDA development in the Australian Capital Territory is being delivered by not-for-profit housing providers and is under construction.

Table 19 – Estimated number and percentage (%) of SDA dwellings and places by provider type in Australian Capital Territory

<i>Provider type</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Not-for-profit housing provider	10	100	10	100

Table 20 – Estimated number and percentage (%) of SDA dwellings and places by development status in Australian Capital Territory

<i>Development status</i>	<i>Number of dwellings</i>	<i>% of dwellings</i>	<i>Number of places</i>	<i>% of places</i>
Under construction	10	100	10	100

Where is the new SDA supply being developed?

In this section, the distribution of new SDA development reported in each that jurisdiction is shown relative to the national figures by building type and design category. Note that these figures do not represent all SDA development activity as some providers who may have SDA developments in progress did not respond to the survey.



New South Wales

Figure 27 - Proportion of SDA places by building type: A comparison between New South Wales and Australia

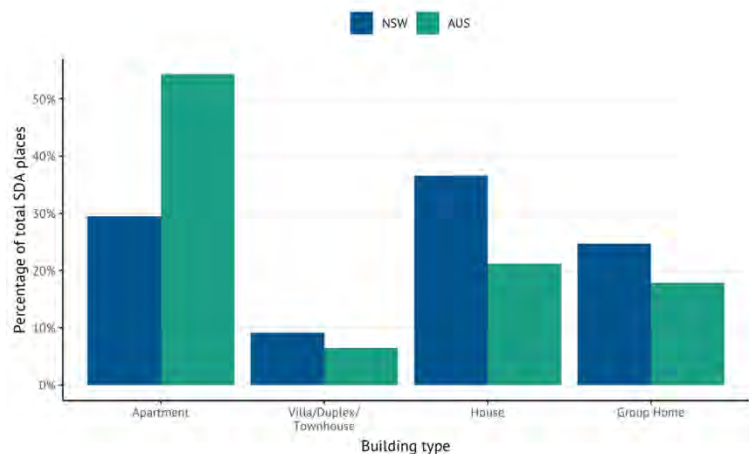
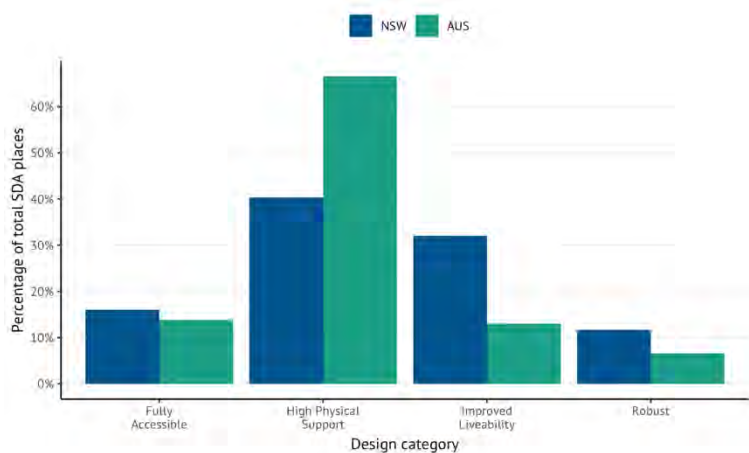


Figure 28 - Proportion of SDA places by design category: A comparison between New South Wales and Australia



Victoria

Figure 29 - Proportion of SDA places by building type: A comparison between Victoria and Australia

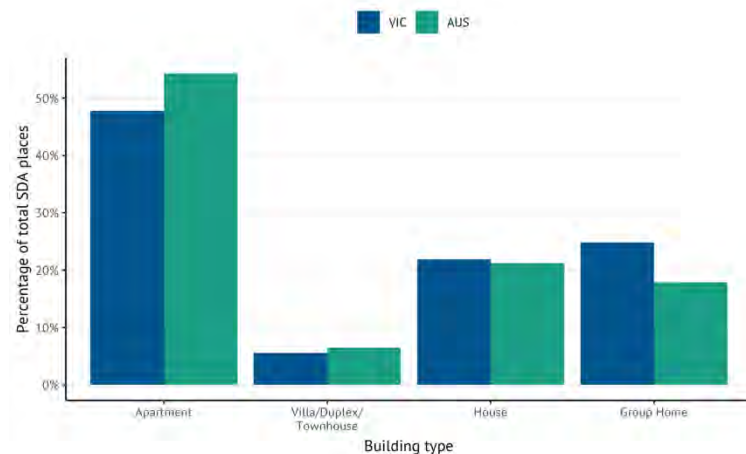
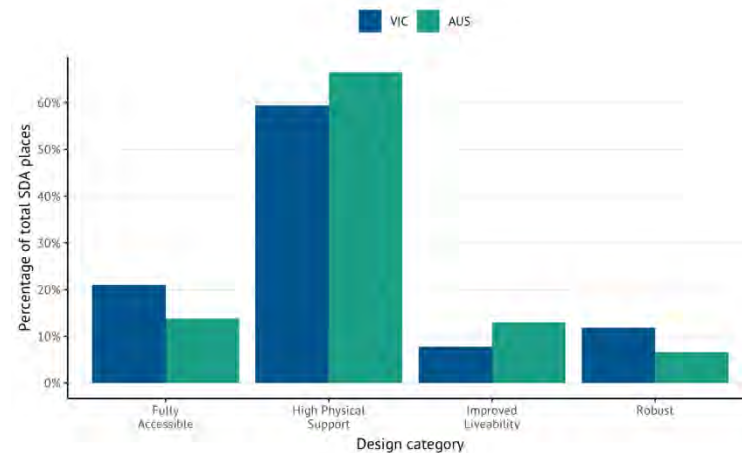


Figure 30 - Proportion of SDA places by design category: A comparison between Victoria and Australia



Queensland

Figure 31 - Proportion of SDA places by building type: A comparison between Queensland and Australia

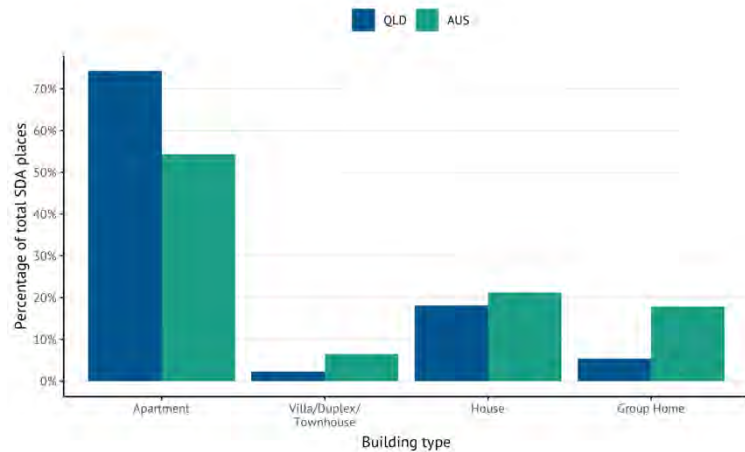
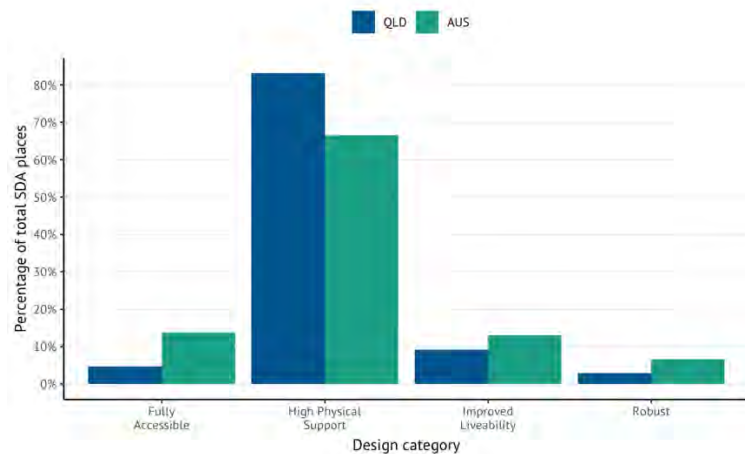


Figure 32 - Proportion of SDA places by design category: A comparison between Queensland and Australia



Western Australia

Figure 33 - Proportion of SDA places by building type: A comparison between Western Australia and Australia

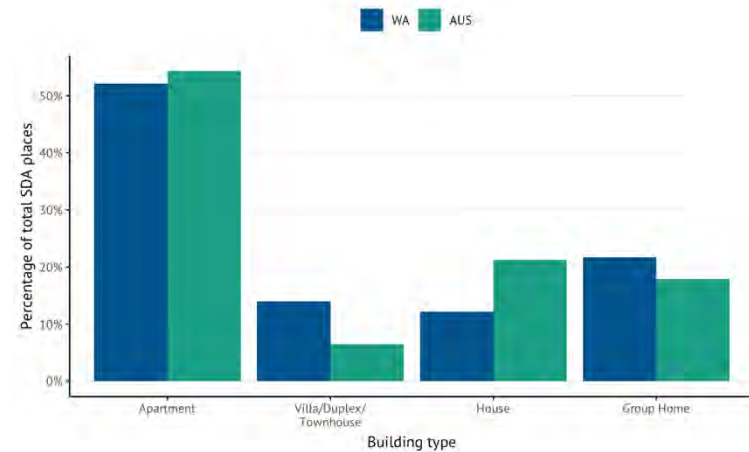
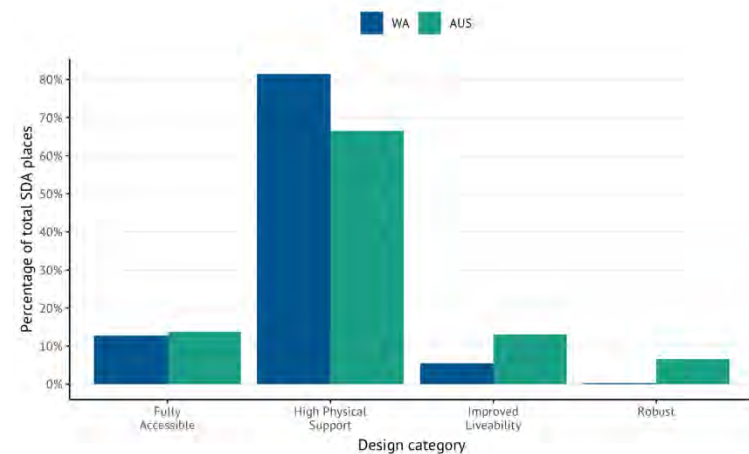


Figure 34 - Proportion of SDA places by design category: A comparison between Western Australia and Australia



South Australia

Figure 35 - Proportion of SDA places by building type: A comparison between South Australia and Australia

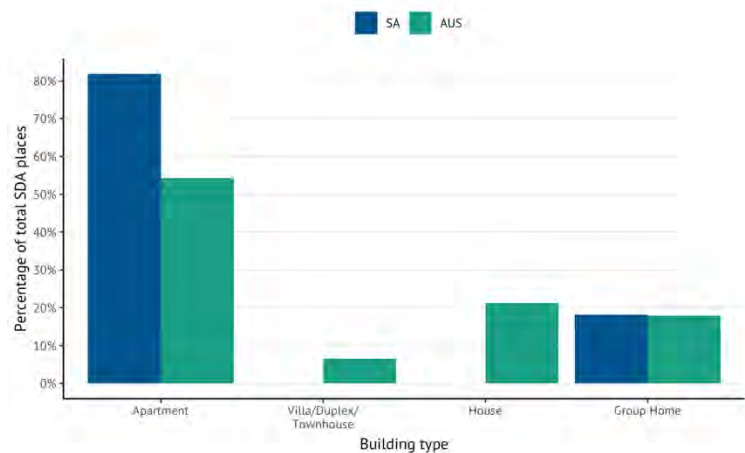
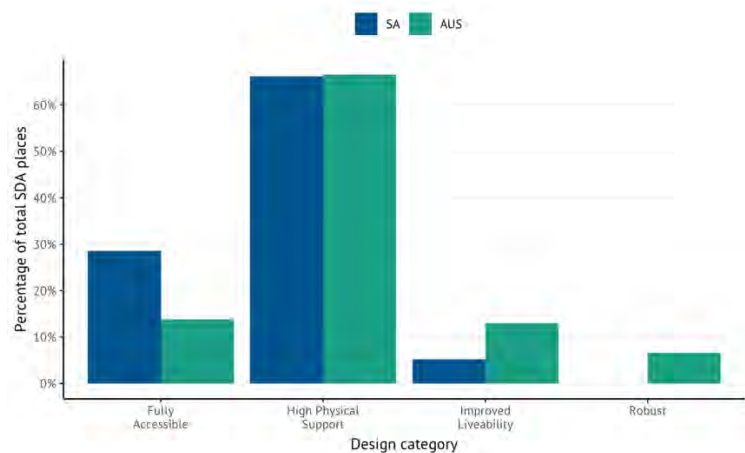


Figure 36 - Proportion of SDA places by design category: A comparison between South Australia and Australia



Tasmania

Figure 37 - Proportion of SDA places by building type: A comparison between Tasmania and Australia

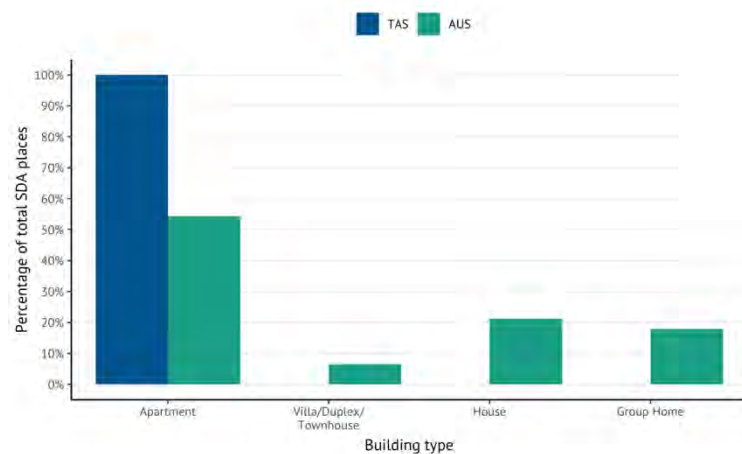
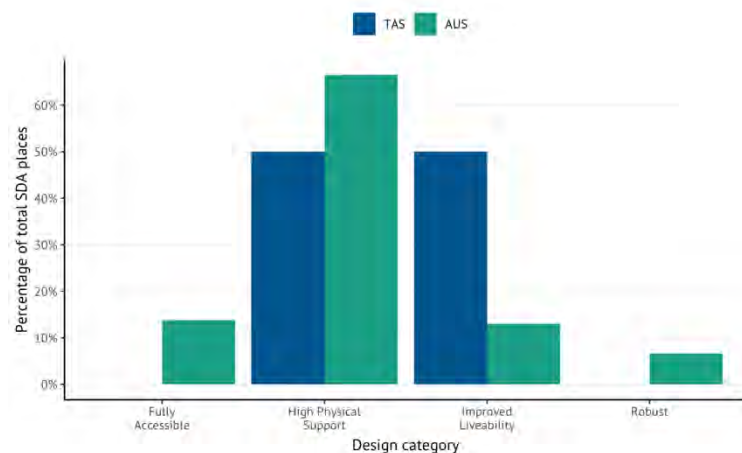


Figure 38 - Proportion of SDA places by design category: A comparison between Tasmania and Australia



Australian Capital Territory

Figure 39 - Proportion of SDA places by building type: A comparison between Australian Capital Territory and Australia

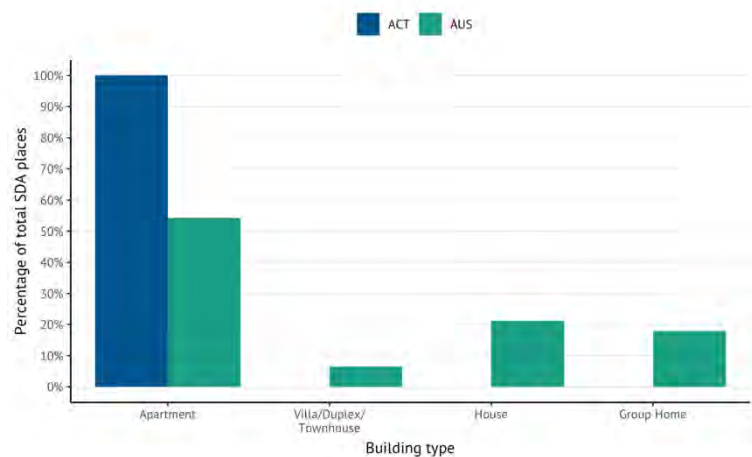
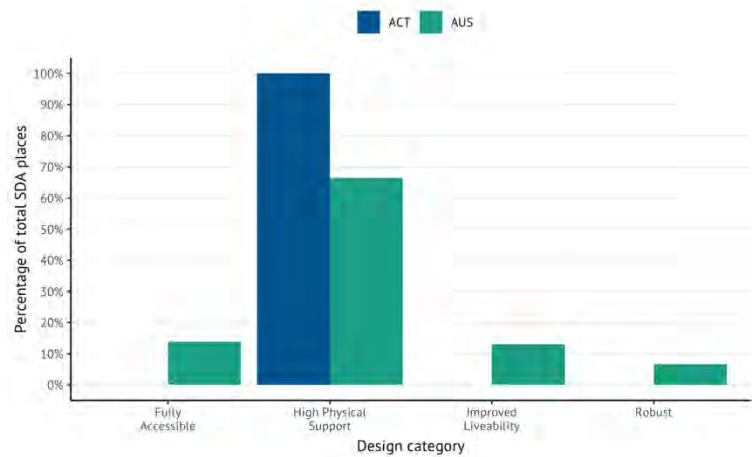


Figure 40 - Proportion of SDA places by design category: A comparison between Australian Capital Territory and Australia



SA4 regions and NDIA data

The section presents the pipeline data (number of SDA dwellings and places) at the SA4 level for each jurisdiction.¹⁵ It also combines this data with what is reported by the NDIA (in-kind and/or enrolled) for each SA4 region and therefore, provide a comprehensive summary of SDA supply in Australia. 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 30 September 2020 shows that there are in-kind properties in Victoria and Tasmania. In this survey, SDA pipeline dwellings were reported in a total of 64 SA4s.

¹⁵ See Australian Bureau of Statistics (ABS, 2016) for more information on Statistical Area Level 4 (SA4)

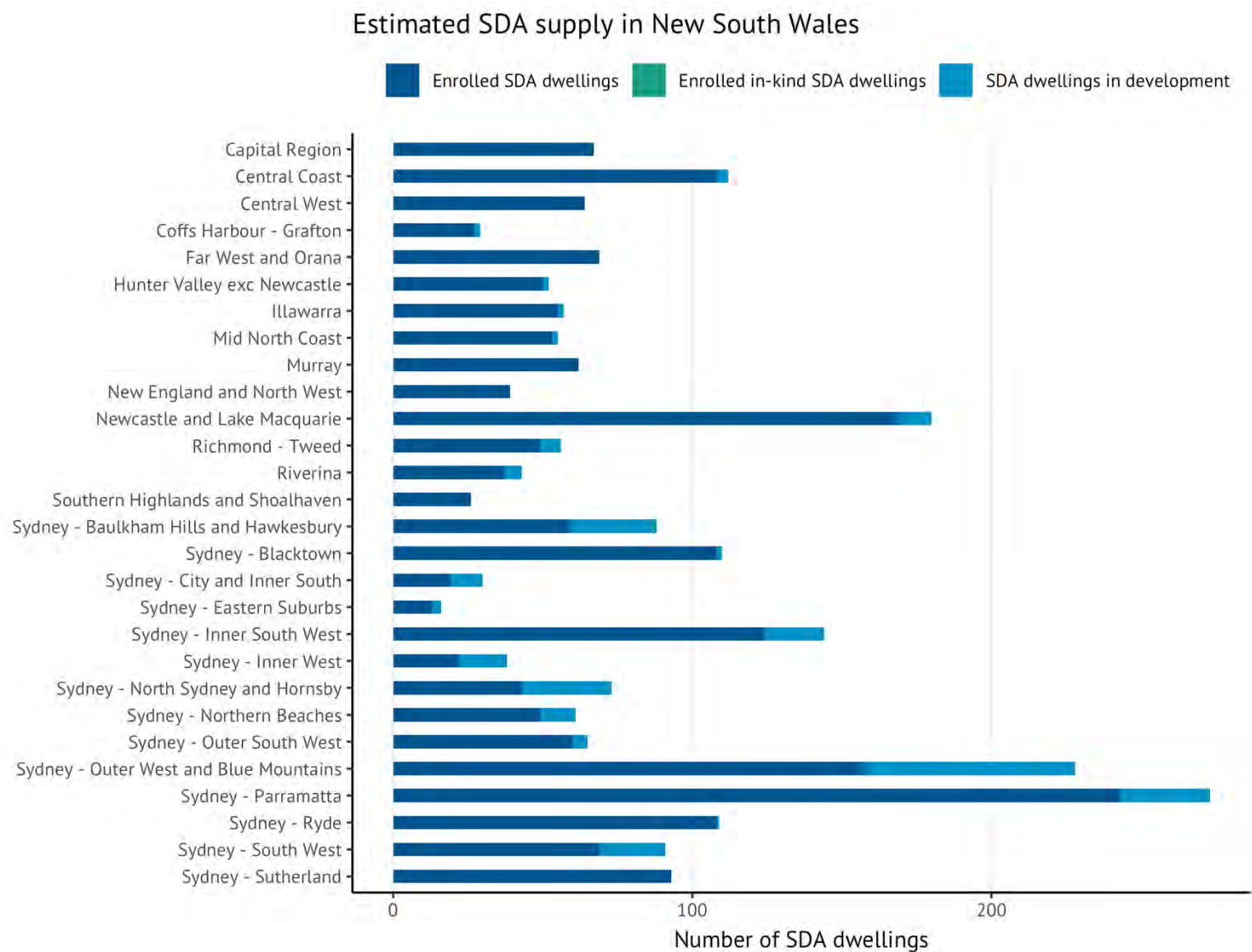
New South Wales

Table 21 – Estimated number of SDA dwellings and places for each SA4 region in the pipeline in New South Wales (NSW)

<i>NSW SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Capital Region	0	0
Central Coast	4	12
Central West	0	0
Coffs Harbour - Grafton	2	6
Far West and Orana	0	0
Hunter Valley excl Newcastle	2	5
Illawarra	2	5
Mid North Coast	2	5
Murray	0	0
New England and North West	0	0
Newcastle and Lake Macquarie	11	13
Richmond - Tweed	7	19
Riverina	6	8
Southern Highlands and Shoalhaven	0	0
Subtotal	36	73
Total		

<i>NSW SA4 Region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Sydney - Baulkham Hills and Hawkesbury	29	29
Sydney - Blacktown	2	6
Sydney - City and Inner South	11	14
Sydney - Eastern Suburbs	3	5
Sydney - Inner South West	20	20
Sydney - Inner West	16	20
Sydney - North Sydney and Hornsby	30	34
Sydney - Northern Beaches	12	20
Sydney - Outer South West	5	11
Sydney - Outer West and Blue Mountains	71	149
Sydney- Parramatta	30	30
Sydney- Ryde	1	3
Sydney - South West	22	26
Sydney - Sutherland	0	0
Subtotal	252	367
		728

Figure 41 - Estimated SDA supply in New South Wales

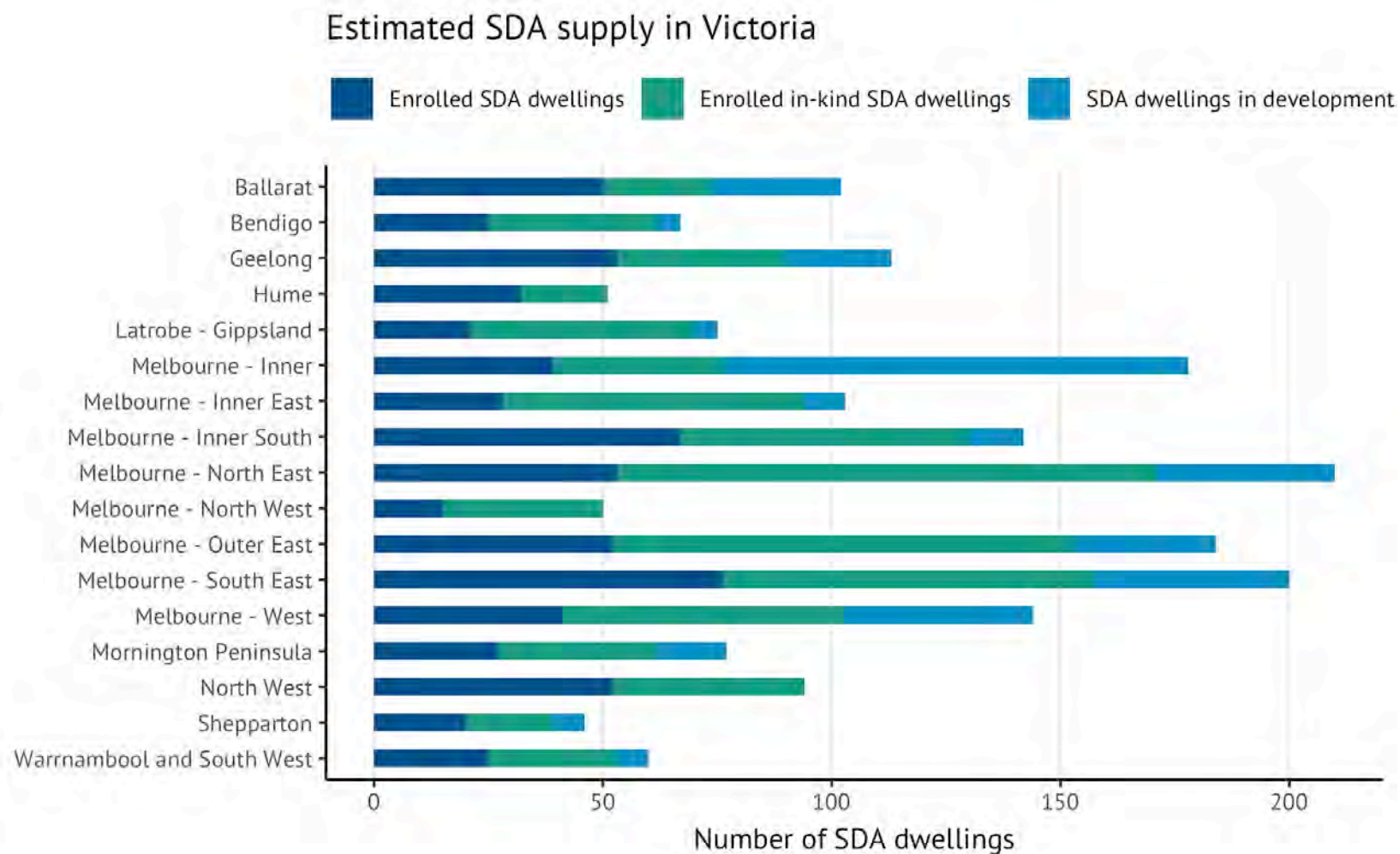


Victoria

Table 22 – Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Victoria (VIC)

<i>VIC SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Ballarat	28	39
Bendigo	5	8
Geelong	23	34
Hume	0	0
Latrobe - Gippsland	5	9
Melbourne - Inner	102	102
Melbourne - Inner East	9	10
Melbourne - Inner South	12	12
Melbourne - North East	39	57
Melbourne - North West	0	0
Melbourne - Outer East	31	38
Melbourne - South East	43	64
Melbourne - West	41	61
Mornington Peninsula	15	20
North West	0	0
Shepparton	7	9
Warrnambool and South West	7	15
Total	367	478

Figure 42 - Estimated SDA supply in Victoria

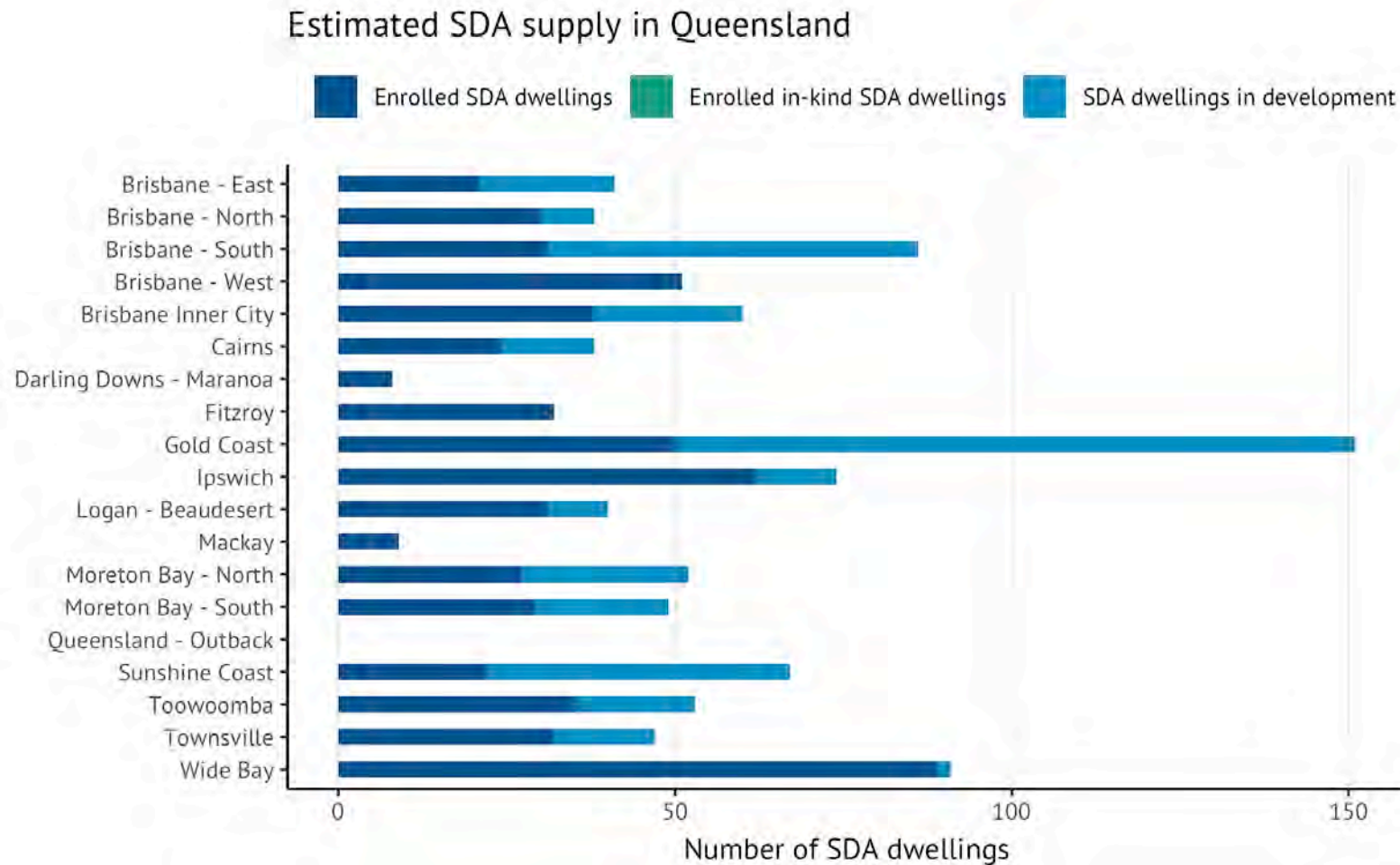


Queensland

Table 23 – Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Queensland (QLD)

<i>QLD SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Brisbane – East	20	26
Brisbane – North	8	8
Brisbane – South	55	77
Brisbane – West	0	0
Brisbane Inner City	22	24
Cairns	14	20
Darling Downs – Maranoa	0	0
Fitzroy	0	0
Gold Coast	101	116
Ipswich	12	14
Logan - Beaudesert	9	20
Mackay	0	0
Moreton Bay – North	25	61
Moreton Bay – South	20	38
Queensland – Outback	0	0
Sunshine Coast	45	63
Toowoomba	18	30
Townsville	15	17
Wide Bay	2	6
Total	366	520

Figure 43 – Estimated SDA supply in Queensland

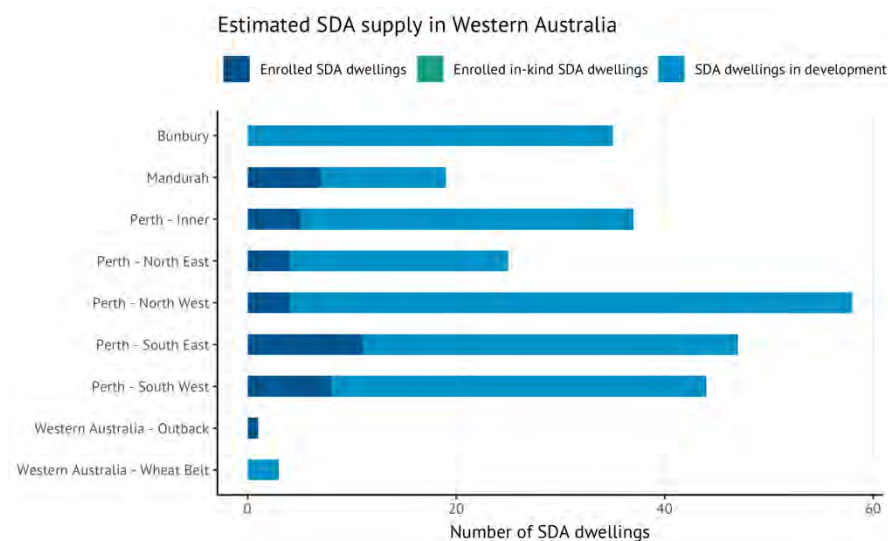


Western Australia

Table 24 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Western Australia (WA)

<i>WA SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Bunbury	35	35
Mandurah	12	13
Perth - Inner	32	32
Perth - North East	21	32
Perth - North West	54	84
Perth - South East	36	52
Perth - South West	36	39
Western Australia - Outback	0	0
Western Australia - Wheat Belt	3	3
Total	229	290

Figure 44 - Estimated SDA supply in Western Australia

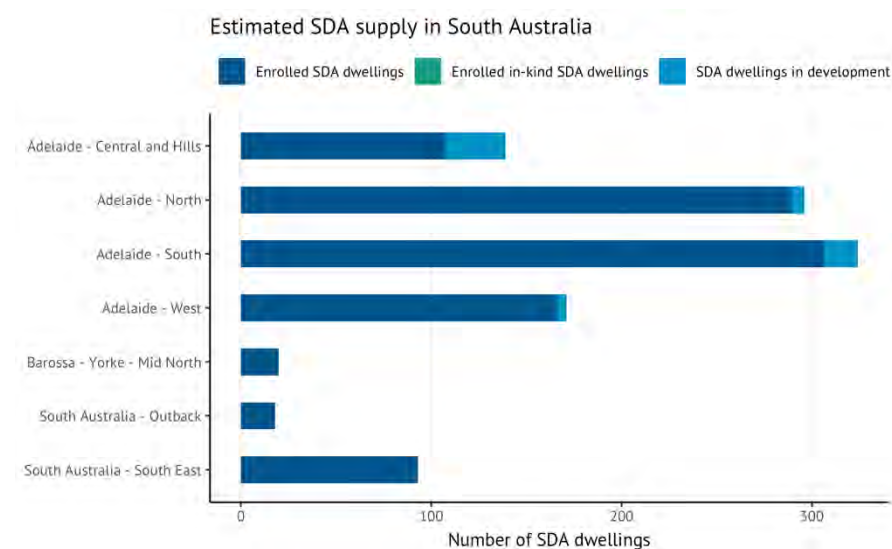


South Australia

Table 25 – Estimated number of SDA dwellings and places for each SA4 region in the pipeline in South Australia (SA)

<i>SA SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Adelaide – Central and Hills	32	32
Adelaide – North	7	18
Adelaide – South	18	22
Adelaide – West	5	5
Barossa – Yorke – Mid North	0	0
South Australia – Outback	0	0
South Australia – South East	0	0
Total	62	77

Figure 45 – Estimated SDA supply in South Australia

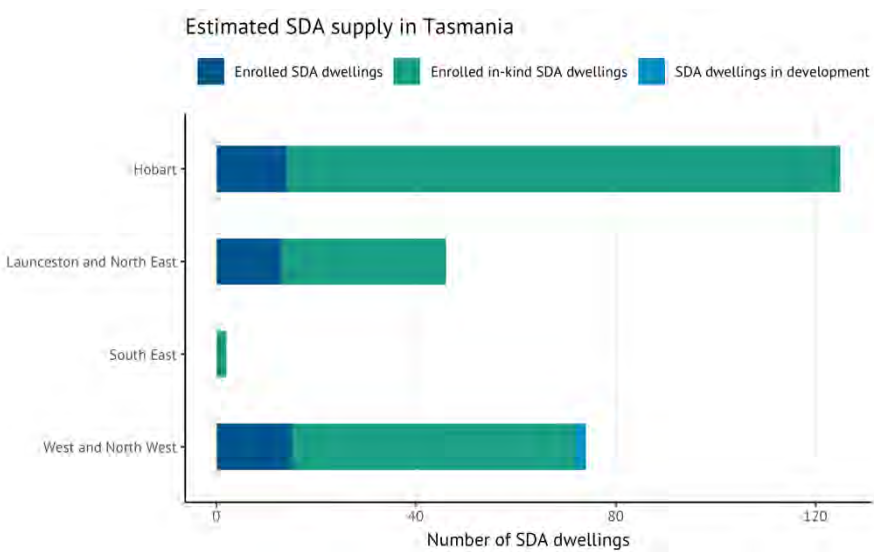


Tasmania

Table 26 – Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Tasmania (TAS)

<i>TAS SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Hobart	0	0
Launceston and North East	0	0
South East	0	0
West and North West	2	2
Total	2	2

Figure 46 - Estimated SDA supply in Tasmania

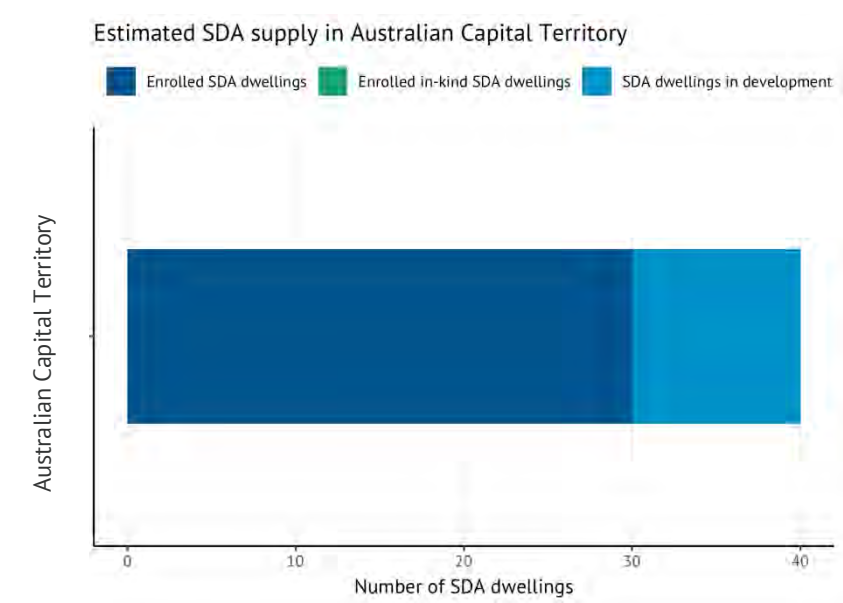


Australian Capital Territory

Table 27 – Estimated number of SDA dwellings and places for each SA4 region in the pipeline in Australian Capital Territory (ACT)

<i>ACT SA4 region</i>	<i>Number of dwellings</i>	<i>Number of places</i>
Australian Capital Territory	10	10
Total	10	10

Figure 47 - Estimated SDA supply in Australian Capital Territory



Beyond the current pipeline

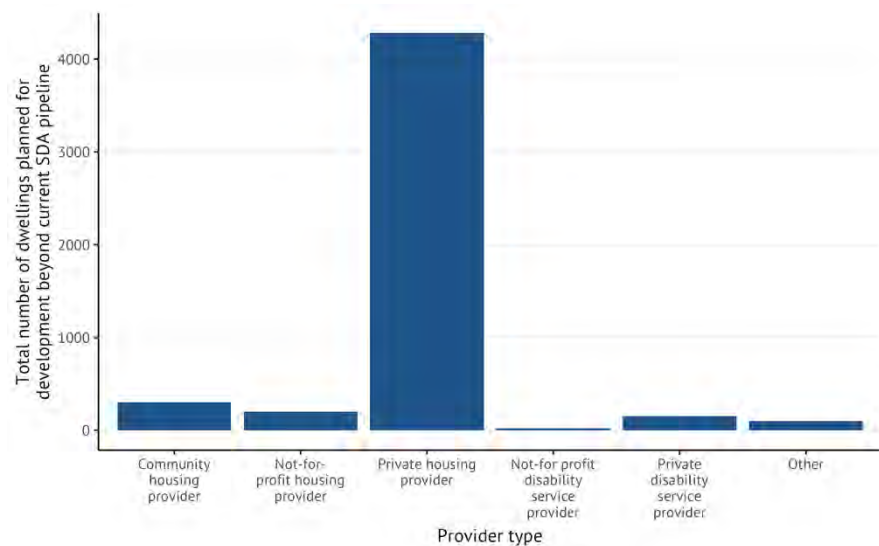
A total of 46 providers responded to this section of the survey, which asked providers about future plans to develop future SDA properties beyond their current pipeline. Developers were asked how many dwellings this includes, and the timeframe in which these dwellings will be built. Of the 46 respondents, 33 providers (71.7%) reported that they were planning on building more SDA dwellings beyond their current pipeline, while 8 providers (17.4%) were unsure.

Of the 33 providers who reported planning more SDA dwellings, 8 providers reported text which could not be coded to a numeric response so, were removed from the analysis. The findings below are therefore based on the responses of 25 providers.

Descriptive analysis

The total number of future SDA dwellings reported by providers was 5061, which were predicted to be developed within the next 1 to 5 years. Note that these dwellings are future plans only and thus do not form part of the current pipeline. As can be seen in Figure 47, the majority of these dwellings are planned to be built by private housing providers (84.6%), followed by community housing providers (6.0%). However, given that the majority of providers who responded to this section of the survey were private housing providers ($n = 14$), these findings should be interpreted with caution.

Figure 48 – Number of SDA dwellings planned for development by provider type over the next 5 years



Note: CHP (n = 3), NFP HP (n = 1), Private HP (n = 14), NFP DSP (n = 3), Private DSP (n = 3), Other (n = 1).

Limitations

There are some limitations in the data presented which should be taken into account when reading this report. This survey is voluntary and therefore not all developers of SDA participated. It is difficult to estimate the share of SDA developers captured. The NDIA reported¹⁶ at 30 September that there are 793 registered SDA providers and 272 active SDA providers. As active providers only include those with enrolled dwellings who are operating existing SDA, this number is not an indicator of the number of providers who may be developing new SDA. It could be expected that the 521 providers not yet active may be developing SDA, however our view is that it is very unlikely that all of these providers are currently developing SDA.

Our approach to ensuring a high participation rate was to approach all SDA providers that have an account with the Housing Hub as well as all providers who have previously participated in the survey. We also used the reach of two industry peak bodies being the SDA Alliance and PowerHousing Australia to encourage all members to contribute.

¹⁶ NDIA (2020). 'SDA Enrolled Dwellings and NDIS Demand Data.' Appendix P, Table P. 4; Table P.6. Data available at: data.ndis.gov.au/data-downloads

We believe this has resulted in data that is representative of a large portion of the SDA market and the number of participants has been consistent with past years (57 responses in this report compared to March 2019: 55, March 2020: 53).

Another limitation to consider is that pipelines reported are taken on face value and we do not require evidence that a contract is in place. While this survey has not captured all of the SDA in development, there is also some SDA in the pipeline that may not be built. We do require at least an address to be known and the provider to say they have entered into a contract in order for pipeline data to be counted.

We have seen numerous examples of SDA projects that are in pipelines that do not eventuate, so one should assume that not all of the places reported will make it to enrolment with the NDIA. This can occur for various reasons along the development life cycle. There was a surprising amount of Queensland apartments reported in the survey. Further analysis is needed to better understand this finding.



Conclusion

Once the unmet demand and the need to replace old stock with contemporary models and configurations of disability housing is taken into account, new housing is needed for an estimated 19,000 NDIS participants over the next 10 years. In order for the SDA market to flourish and meet this demand, there are three essential elements that need to evolve at a similar pace. Firstly, NDIS participants needed SDA in their plans at a level that enables them to move to new SDA, secondly, a steady supply of new disability housing is required that meets the needs and preferences of SDA tenants and finally investors are needed to fund SDA.

The SDA supply survey conducted by the Summer Foundation over the past three years demonstrates that there is a steady pipeline of SDA under development (Mar 2019 - 1,518 places; Mar 2020 - 1,766 places; Nov 2020 - 1,817 places). This is consistent with the steady increase in the number of new SDA dwellings registered with the NDIS over the past two years.

The concentration of new SDA in the pipeline was heaviest in NSW in Mar 2019 (41.8% of places) and Mar 2020 (34.4% of places) and in this report, has shifted to QLD with 28.6% of places. This year sees a much more even spread across the three states of QLD, VIC and NSW than ever before.

The building type of Apartment has dominated throughout the last three years as the preferred type in the pipeline, and has grown each year (Mar 2019 - 35.2%; Mar 2020 - 48.2%; Nov 2020 - 54.3%). Group homes followed in both Mar 2018 (27.2%) and Mar 2019 (28.4%). This year Houses have been the second most development building type (21.2%) seeing a move away from group homes being developed.

High Physical Support has been the design category with the most development in the pipeline across all three surveys (Mar 2019 - 63.2%; Mar 2020 - 74.7%; Nov 2020 - 66.5%). This has been followed by either Fully Accessible (Mar 2019 - 16.7%; Mar 2020 - 10.4%; Nov 2020 - 13.8%) or Improved Liveability (Mar 2019 - 15.9%; Mar 2020 - 9.4%; Nov 2020 - 13.0%).

The share of High Physical Support dwellings has continued to dominate across all three years. The NDIA data from 30 September 2020 shows the number of Participants with SDA in their plans who are seeking a new dwelling.¹⁷ This data shows that there are 962 people (30% of all people) with SDA at the High Physical Support level looking for housing. This suggests that it is likely that supply of High Physical Support dwellings is outstripping the number of people with this level of SDA in their plans at this time.

The data over the past three years shows a change in the combination of building type and design category. In Mar 2018 the most developed was High Physical Support Group Homes at 26.9%, followed by High Physical Support Apartments at 21.4%. In Mar 2020 and in this current report High Physical Support Apartments are the most developed at 39% and now 40.9% of all places. This shows a shift in places reported towards High Physical Support Apartments further this year accounting for almost half of all places.

Four years after the commencement of SDA payments, only 54% of the estimated 28,000 eligible NDIS participants¹⁸ receive payments for SDA. Over 12,000 eligible NDIS participants are eligible for SDA but do not have these payments included in their NDIS plans. The 'missing' SDA tenants are living with parents, or living in disability housing owned by the Victorian or Tasmanian governments, residential aged care, hostels or boarding houses. Most of the NDIS participants that do have

SDA payments in their NDIS plans are living in old housing stock and do not have SDA approved at a level that would enable them to move into newly built SDA.

In 2021, the Housing Hub team at the Summer Foundation is implementing a national engagement campaign to support people with disability and those around them to "believe better is possible." Many people eligible for SDA funding are not aware of SDA or that it is even an option. Without informed consumers and demand driven supply there is a risk that we will be left with housing infrastructure for the next 30 years that is not fit for purpose.

While the lack of action to date promoting SDA to NDIS participants, building their capacity to consider housing options and getting SDA in their plans does not appear to have inhibited SDA supply or investment, it is a significant risk to the development of a mature SDA market. This risk may become more tangible for SDA Providers as the pipeline

¹⁷ NDIA (2020). 'SDA Enrolled Dwellings and NDIS Demand Data.' Appendix P, Table P. 4; Table P.6. Data available at: data.ndis.gov.au/data-downloads

¹⁸ NDIA (2020). 'SDA Enrolled Dwellings and NDIS Demand Data.' Appendix P, Table P.1. Data available at: data.ndis.gov.au/data-downloads

described above comes online over the coming years. If the demand side of the market is not consciously developed, it may become increasingly difficult to identify tenants with the level of SDA in their NDIS Plans to match the build type and design category being developed.

It is promising to note that confidence levels of SDA developers remains strong. In this survey, more than half of the providers reported that they were slightly confident (42.1%) or very confident (15.8%) in the SDA market.

A recent desktop review of SDA investment opportunities and a survey of SDA investors demonstrates the significant appetite for SDA investment.¹⁹ Another significant limitation to the SDA market is that while there is an increasing number of willing investors, there are very few SDA providers with a track record of building good quality SDA at scale and experience in finding suitable tenants and supporting them to navigate the NDIS processes and move in. A recent SDA Explainer for Investors aims to support investors to make an informed decision about the myriad of SDA investment opportunities. While the NDIA has been working on its SDA approval systems and processes, the SDA provider experience is that the inconsistencies and the time the NDIA takes to determine the outcomes of SDA and support applications continues to be a major contributor to vacancies.

SDA is an emerging market that has the potential to stimulate world-class innovation in disability housing and support that incorporates smart home technology and is cost-effective and evidenced based. Given the annual cost of the support provided within disability housing is over \$8.3 billion, the relative cost of SDA is relatively small (i.e 2.3% of the cost of support). The SDA market provides a unique opportunity to demonstrate how the provision of good quality housing designed to maximise independence and autonomy has the potential to reduce reliance on paid supports and the long-term liability of the NDIS. Establishing a rigorous evidence base regarding tenant outcomes and the impact on paid supports over the next 5 years also has the potential to justify the expansion of SDA beyond the initial 28,000 NDIS participants.

¹⁹ Summer Foundation and JBWere (2020), 'Specialist Disability Accommodation (SDA) – Explainer for Investors' www.summerfoundation.org.au/resources/specialist-disability-accommodation-sda-explainer-for-investors/

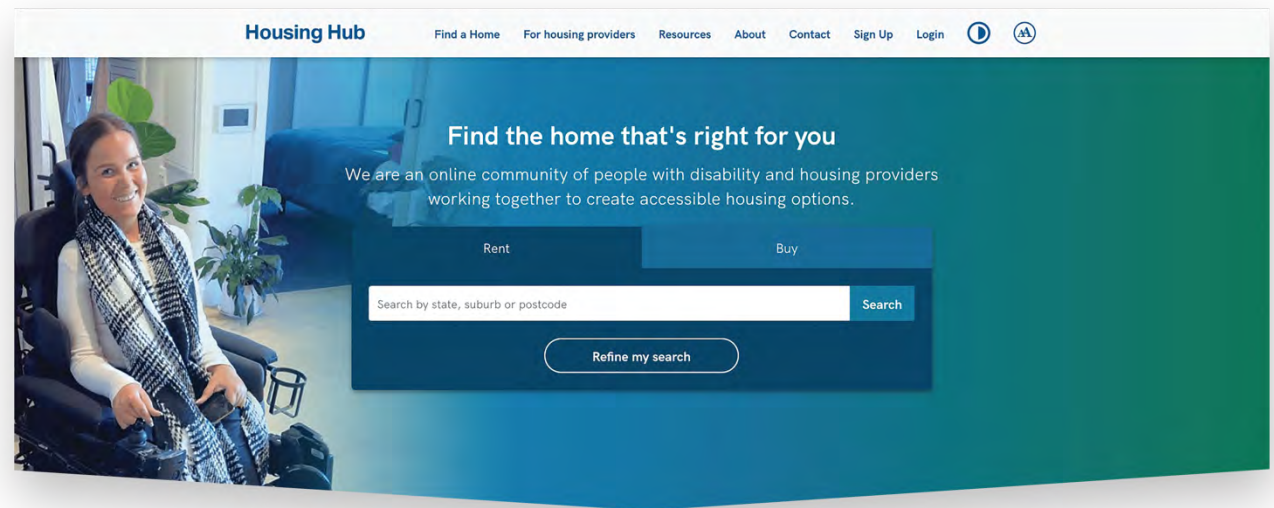
Housing Hub

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 1,000 properties currently listed, the Housing Hub features all design categories of Specialist Disability Accommodation (SDA), as well as many other types of accessible housing.

housinghub.org.au

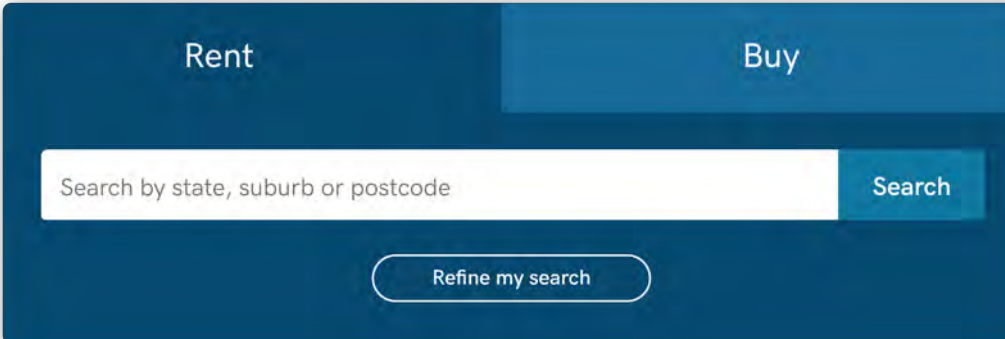


Housing seekers can search through the listings, or create a housing seeker profile by answering a few questions about where they want to live, what type of home they're looking for, what features are required and who they would like to live with. The Housing Hub will then show the seeker listed properties 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.

Generalised data resulting from housing seeker profiles on the Housing Hub provides insights into the demand for accessible housing across Australia. With almost 10,000 new users and around 65,000 page views every month – and over 700 enquiries generated to property owners per month (and growing) – 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.

Find the home that's right for you

We are an online community of people with disability and housing providers working together to create accessible housing options.

A screenshot of a web interface for finding housing. It features a dark blue header with two tabs: 'Rent' and 'Buy'. Below the tabs is a search bar with the placeholder text 'Search by state, suburb or postcode' and a blue 'Search' button. At the bottom, there is a white button with a blue border labeled 'Refine my search'.


Background

In 2017, with seed funding from the Australian Government Department of Social Services (DSS) Sector Development Fund, the first iteration of the Housing Hub was created by the Summer Foundation as a pilot project. In its first year, the Housing Hub expanded from a few small regions to include housing located in many states across Australia.

The Housing Hub team began providing tenant matching services in 2018. To date, our team has supported over 400 people to access SDA funding and move into a new SDA home.

Ringwood

Rent SDA ☆



Quiet home in the Eastern Suburbs

Suitability Score 78%

Reasonable Rent Contribution as set by the NDIA


2 Bedroom 2 Bathrooms 1 Cars

House Fully Accessible Bedroom Only

Number of residents: 2

Posted 9 days ago Edited 2 minutes ago

Find a Home For housing providers Resources About Contact



Download application form

Download brochure

Print Listing

Quiet home in the Eastern Suburbs

Ringwood, VIC, 3134

Reasonable Rent Contribution as set by the NDIA [More info](#)

2 Bedroom 2 Bathroom 1 Car park

Bedroom Only Available 14/12/2020

*Plus 100% of Commonwealth Rent Assistance

*Plus 100% of the SDA funding in your NDIS plan

This property will accept MTA funding instead of SDA funding for up to 90 days [Read more](#)

SDA Information

SDA Design Category: Fully Accessible

SDA Building Type: House

SDA Location: Ringwood - VIC - Outer Easter Suburbs

Suitability Score

Suitability score is calculated using your preferences set in 'My Preferences'. Higher scores indicate the properties that best meet your needs.

78%

View score breakdown

My Preferences

Resources

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

www.housinghub.org.au/resources



Housing Seeker Resources



Housing Provider Resources



Support Team Resources

Services for housing seekers

The Housing Hub team provides a range of services to support housing seekers. Via workshops, resources 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.

Recent 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 inquiries from prospective tenants.

Premium services

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

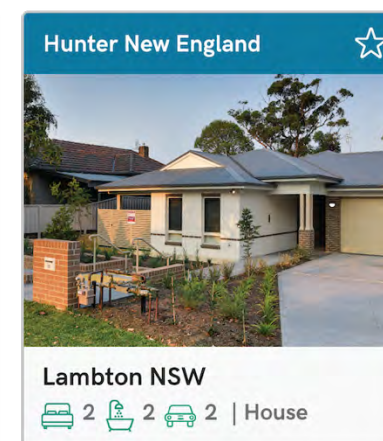
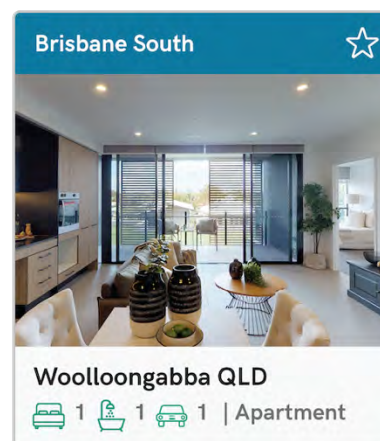
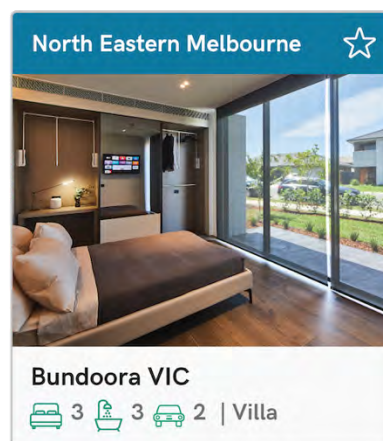
Generalised data resulting from housing seeker profiles on the Housing Hub can build a nuanced understanding of the demand for accessible housing. With insights into what types of housing (and housing features) are desired in what locations, providers can build to address demand with greater certainty. The Housing Hub regularly releases data insights to the market; while more detailed analyses are available for a fee. Contact support@housinghub.org.au for more information.

For a fee, 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 to housing seekers via the Housing Hub's social media channels and via email to our subscriber list of more than 5,000 housing seekers.

For more information on the Housing Hub's services for housing providers and vendors, email:

support@housinghub.org.au

Featured Homes



Appendix A

A comparison of content between the 2019 and 2020 supply report

<i>Section</i>	<i>Content</i>	<i>Previous report (data collected in 2019, report published 2020)</i>	<i>Previous report (data collected in 2020, report published 2020)</i>
About the providers	Number of months building SDA properties		✓
	Provider type	✓	✓
	Engagement of groups to inform building type, design category and location		✓
	Strategies for sourcing tenants	✓	✓
	Confidence in the SDA market	✓	✓
	Management of SDA properties	✓	✓
	Separation for housing and support services	✓	✓
	Filing SDA vacancies	✓	✓
	Groups consulted in design phase of build	✓	✓
	Groups consulted in all phases of build		✓
	Methods for inspection of dwellings		✓

<i>Section</i>	<i>Content</i>	<i>Previous report (data collected in 2019, report published 2020)</i>	<i>Previous report (data collected in 2020, report published 2020)</i>
Needs and preferences of people with disability	Views about understanding the needs and preferences of people with disability		✓
	Resources used for understanding the needs and preferences of people with disability		✓
	Questions for people with disability		✓
SDA Policy	Level of difficulty to meet NDIS requirements for design categories and building types		✓
	Likelihood of accommodating policy change enabling family members to live together		✓
SDA Pipeline	Location	✓	✓
	Building type	✓	✓
	Design category	✓	✓
	SDA capacity	✓	✓
	Estimated date for occupancy	✓	✓
	Stage of development	✓	✓
	Number of bedrooms, bathrooms, spare rooms, and study nook (i.e., layout of dwelling)	✓	✓
	OOA	✓	✓
Beyond SDA pipeline	Special design features	✓	✓
	Plans to build beyond current pipeline	✓	✓
	Number of dwellings to be built	✓	✓
	Timeframe for build		✓

Appendix B

List of contributors who provided consent for publication

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

1. aaasda pty ltd
2. Ability Housing
3. Ability SDA
4. Able Australia
5. AccessAccom
6. Accessible Homes Australia
7. Adaptive Housing
8. Alysto Construction
9. Anand Group Homes
10. BlueCHP Limited
11. Carra Property
12. Community Housing Limited
13. Community Living & Respite Services
14. ConnectGV
15. Cooinda Terang Inc
16. Department of Health & Human Services
Victoria
17. Disability Housing Centre
18. Disability Housing Solutions Pty Ltd
19. DPN Casa Capace
20. EACH Housing
21. Enliven Housing
22. Evolve Housing Ltd
23. Good Housing
24. Guardian Living Australia
25. Halcyon Homes
26. Havelock Housing Association
27. Home Base Services Limited
28. Housing Choices Australia
29. Hume Community Housing
30. Illowra Projects Pty Ltd
31. Kennett Ridge
32. MAD SDA WA
33. NDISP
34. Nhaka Asset Management
35. Perth Design & Construct
36. pulse property solutions
37. Purposed Housing Australia
38. Sana Living
39. Scope
40. SDA Management Australia
41. SDA Smart Homes
42. SGCH
43. SRP Impact Fund
44. St John of God Accord
45. Summer Housing
46. The Housing Connection
47. United Disability Care
48. Vera Living Pty Ltd
49. VMCH
50. Willow house Services
51. Youngcare Ltd
52. Yumba-Meta Limited

List of contributors who provided images

Page i

Summer Housing, Kirrawee NSW

Page 7 (clockwise)

Department of Health and Human
Services, VIC

Photo courtesy of Paul West

Enliven Housing, San Souci NSW

Summer Housing, Westmead NSW

Purposed Housing, Cranbourne VIC

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DPN Casa Capace pilot SDA home,
Oran Park NSW

Photo courtesy Tyrone

Branigan Photography

Page 24

Blue CHP Limited, Lambton NSW

Page 51

DPN Casa Capace pilot SDA home,
Oran Park NSW

Photo courtesy Tyrone

Branigan Photography

Page 56

Summer Housing, Kirrawee NSW

Page 76

Blue CHP Limited, Lambton NSW

Page 78 (left to right)

DPN Casa Capace pilot SDA home,
Oran Park NSW

Photo courtesy Tyrone

Branigan Photography

Summer Housing, Woolloongabba Qld

Blue CHP Limited, Lambton NSW

Appendix C

Data screening for SDA pipeline section of survey

A total of 46 providers completed the SDA pipeline section of the current survey, together reporting a total of 1246 dwellings. However, as per the previous survey, completed dwellings which had already been enrolled with the NDIS were excluded from the analysis and thus not included in the current report.²⁰ This is to avoid duplication with what is already published by the NDIS. All other dwellings reported for each of the following stages of development were included:

- Completed and pending confirmation of enrolment by NDIA
- Construction completed, pending enrolment
- Under construction

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

This resulted in 127 dwellings being removed from the SDA pipeline analysis, yielding a total of 1119 dwellings reported in the SDA pipeline that were 'new' but not yet enrolled by NDIA as of 11th November 2020 (the closing date of the survey).

Based on these 1119 dwellings, the total number of SDA places reported in the current pipeline was 1507, a decrease of 177 from the number of places reported in the previous survey. However, it is important to note that this figure does not include the pipeline data of providers who did not participate.

²⁰ Please note that this information will be analysed at a later point and included in a different report with the aim to extend upon the information about enrolled dwellings reported by the NDIA.

When combining the pipeline data from the previous SDA supply report, the number of dwellings and respective places increased. Specifically, dwellings that had an estimated occupancy date of October 2020 or beyond (as reported by providers in the previous survey) were included in the current estimate.²¹²² Importantly, this only occurred if dwellings were not also reported in the current survey. This resulted in an additional 205 dwellings and 310 places being added from a total of 17 providers, 10 of which did not provide any pipeline data in the survey this year. Therefore, the pipeline data presented in the current report is based on the responses of 56 SDA developers. The combined pipeline total revealed that there are 1324 dwellings in development, creating a total of 1817 SDA places. This is equivalent to an average of 1.4 SDA residents per dwelling.

Of the 56 total responses for the SDA pipeline, 36 providers reported their pipeline information in REDCap and 20 providers reported their pipeline information using the Excel bulk template (10 providers from the current survey and 10 providers from the previous survey whose pipeline was still in development and therefore, included in this report).

For accuracy, the statistical geography of each dwelling in an SDA pipeline was verified and/or determined using ABS maps (ABS, 2020) to identify the 2016 Statistical Area Level 4 (SA4) and the 2020 Local Government Areas (LGA). 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.

²¹ Please note that this information will be analysed at a later point and included in a different report with the aim to extend upon the information about enrolled dwellings reported by the NDIA.

²² This date is an estimated occupancy date only and should be interpreted with caution.

Appendix D

References

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Australian Bureau of Statistics. (2020). *ABS maps*.
<https://itt.abs.gov.au/itt/r.jsp?ABSMAPS>

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