Housing Seeker Snapshot

November 2022
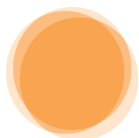
Housing Hub
Housing Seeker Snapshot

Fourth edition – November 2022
First edition – May 2021

CITATION GUIDE

Rothman, R., Wellecke, C., Rathbone, A., Winkler, D. & Aimers, N. (2022, November). *Housing Seeker Snapshot*. Melbourne, Australia: Housing Hub and Summer Foundation. **https://www.housinghub.org.au/reso urces/article/housing-hub-data-snapshot-housing-seekers**

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DISCLAIMERS

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Introduction

Welcome to the fourth snapshot of housing seeker data from the Housing Hub. The seeker snapshots provide detailed and up-to-date information about the characteristics, needs, and preferences of seekers who are looking for accessible housing options on the Housing Hub.

Information about housing seekers is collected when seekers use the Housing Hub website to search for housing. For example, seekers can quickly and easily search available housing on the Housing Hub website via location, property type, support needs and property features. These searches can provide information about the types of properties seekers are looking for. In addition to conducting searches, seekers can also create a housing seeker profile on the Housing Hub website to be notified when suitable properties become available. The information that seekers add to their profiles is collected and includes data about the characteristics of seekers as well as their housing preferences, such as where and with whom they would like to live, and what type of property features they are looking for. See page 2 for further information about the Housing Hub.

Together, searches and profiles created on the Housing Hub website result in a significant volume of demand data from housing seekers. In the previous month alone, more than 11,000 searches have been conducted on the Housing Hub website, and more than 250 seekers have updated their seeker profiles. The Housing Hub is also one of the most commonly used resources by housing providers to source tenants for their properties,[1] making the Housing Hub a valuable source of information regarding seekers in the accessible housing market. Indeed, surveys indicate that housing providers commonly use Housing Hub market data reports to understand the needs and preferences of people with disability and inform build decisions.[2]

By releasing the demand data collected via the Housing Hub's website, the Housing Hub hopes to enhance access to consumer data in the accessible housing market. Without access to detailed information on the demand for accessible housing, providers run the risk of developing housing that does not align with the needs of the market. A lack of access to demand data has been reported to pose a key challenge and market barrier for housing providers,[3] leaving providers feeling uncertain about their investments and housing developments. As such, collecting and releasing information on housing seekers is critical to guide housing providers operating in the accessible housing market and ensuring that properties meet the needs and preferences of housing seekers.

In addition to demand data, the Housing Hub also collects information about the supply-side of the accessible housing market. This supply information is collected when providers create listings on the Housing Hub to advertise their vacancies. These listings include a variety of details about the properties, such as property features, location, images and support services. Comparing this supply data to the demand data collected via the Housing Hub can help uncover potential gaps between what seekers are looking for and what is currently being offered in the market. This is critical given that recent research

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[1] Wellecke, C., Robertson, J., Mulherin, P., Rathbone, A., Winkler, D., Rothman, R., & Aimers, N. (2022). *Specialist disability accommodation supply in Australia*. Housing Hub and Summer Foundation; Aimers, N., Wellecke, C., Winkler, D., Rathbone, A., & Mulherin, P. (2021). *Specialist Disability Accommodation – Supply in Australia*. Housing Hub and Summer Foundation. **https://www.housinghub.org.au/resources/article/report-sda-supply-in-australia**

[2] Ibid.

[3] Wellecke, C., Robertson, J., Mulherin, P., Winkler, D., & Rathbone, A. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation. **https://apo.org.au/node/318315**; Aimers, N., Rathbone, A., Winkler, D., Wellecke, C., & Mulherin, P. (2022). *CHPs and disability housing: An exploration of SDA*. Housing Hub and Summer Foundation. **https://apo.org.au/node/317170**; Aimers et al. (2021, November). *Specialist Disability Accommodation – Supply in Australia*. Housing Hub and Summer Foundation; Winkler, D., Aimers, N., Rathbone, A., Douglas, J., Wellecke, C., Goodwin, I., & Mulherin, P. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation. **https://apo.org.au/node/316937**

has increasingly shown the importance of matching supply and demand in the accessible housing market to avoid prolonged vacancies and ensure that housing seekers can find suitable properties.[4]

This report aims to provide up-to-date data on the characteristics, needs, and preferences of housing seekers on the Housing Hub. This demand data is also compared to information about available supply on the Housing Hub. The report extends upon the first 3 editions of the seeker snapshot reports[5] by including the latest housing seeker data for the previous 6 months, from May 2022 to November 2022.

About the Housing Hub

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

The Housing Hub website – www.housinghub.org.au – lists properties for rent or sale that may be suitable for people with disability. With more than 9,600 properties listed since the website was launched and more than 2,500 properties currently listed, the Housing Hub features all design categories of Specialist Disability Accommodation (SDA), as well as many other types of accessible housing.

Housing seekers can search through the listings, or create a housing seeker profile by answering a few questions about where they want to live, what type of home they are looking for, what features are required and who they would like to live with. The Housing Hub then shows the seeker listed properties that are a good match for their profile. Each listing includes a 'Suitability Score', which tells the seeker how well the property matches their preferences. When creating a profile, housing seekers can also elect to be automatically notified when a property is listed that is a good match for their profile. All of these functions are available to housing seekers free of cost.

Generalised data resulting from housing seeker profiles on the Housing Hub provides insights into the demand for accessible housing across Australia. More than 466,000 people have accessed the Housing Hub to search for housing since the website was first launched in 2017, and more than 250 seekers have updated their seeker profiles in the previous month alone. Thus, the insights generated are significant. Sharing de-identified data gleaned from these interactions with the housing market enables the needs and preferences of people with disability to shape future development.

Resources

The Housing Hub website also 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

More information on the different services offered by the Housing Hub can be found on page 29.

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[4] Wellecke et al. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation
[5] Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke, C., Aimers, N., Rathbone, A., Winkler, D. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone, A., Aimers, N., Winkler, D. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation. **https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers**

Terms used

Seekers
(Housing) seekers are people who are using the Housing Hub to search for housing. Seekers are usually people with disability looking for accessible housing options.

Providers
(Housing) providers are the organisations or individuals who are offering accessible housing for rent or sale on the Housing Hub.

Supporters
Supporters are people who work with people with disability to support their housing search. Supporters include family members, support coordinators and allied health professionals.

SDA
Specialist Disability Accommodation (SDA) is housing for people with an extreme functional impairment and/or very high support needs. SDA is funded under the National Disability Insurance Scheme (NDIS). SDA has design features that maximise residents' independence and reduce the amount of person-to-person supports required.

Profiles
(Housing seeker) profiles are a set of data that housing seekers may choose to provide to the Housing Hub. This is data about seekers' housing needs and preferences. This data enables the Housing Hub to suggest properties to the seeker that meet their needs and preferences.

Listings
(Property) listings are advertisements on the Housing Hub website for homes that are available for people with disability to rent or buy. Each listing on the Housing Hub is created and managed by the owner or provider of the property. Listings on the Housing Hub include various housing types, including houses, units/villas, apartments, and rooms in shared supported accommodation (the latter are commonly known as 'group homes'). Currently, listings on the Housing Hub include all design categories of SDA and non-SDA housing options, as well as various other categories of housing for people with disability, such as Medium Term Accommodation (MTA) and Short Term Accommodation (STA). Currently, there are listings on the Housing Hub in all Australian states and territories.

Housing Seeker

Housing Provider

Support Team

Data

As well as its primary function of connecting housing seekers with homes that suit their wants and needs, the Housing Hub has been built to collate data that will assist the market in developing new housing that aligns with what people with disability are looking for.

A number of data sources have been used to develop this report, as described below. Throughout the report, the following data labels will show which data source is being used.

Profile data

Housing seekers can use the Housing Hub to set up a housing seeker profile. This is completely voluntary, and the site can be used without creating a profile. If housing seekers choose to create a profile on the Housing Hub, it is made clear that their information will be used in a de-identified way to inform the market about what seekers want. This profile data can be used to understand the characteristics of housing seekers, as well as their housing needs and preferences.

Many people who complete a profile on the Housing Hub will come into contact with the Housing Hub team. This may be via an event run by the Housing Hub, responding to emails received about property alerts, calling the Housing Hub's NDIS Housing Advice Line or by the Housing Hub calling to offer support. Collectively, this activity helps ensure that housing seeker profiles are developed with some capacity-building support for the people with disability who are creating those profiles. Capacity-building support is important so that people can exercise informed choice in their housing journeys, as the market has changed considerably over the last 5 years and many housing seekers do not know about the range of housing options now available.

Once a person has created a profile on the Housing Hub, they can update their preferences, needs, and personal information at any time. To reflect the most up-to-date seeker data, the current report only draws from profiles that have been updated within the previous 6 months (between 1 May 2022 - 1 November 2022). This resulted in de-identified data from a total of 1,461 housing seeker profiles. It is important to note that all fields are optional when creating a profile except for 'name' and 'email address'. As such, analyses using profile data in this report may not show data for all 1,461 housing seeker profiles. The specific number of profiles included in the analyses is shown in the Figure titles.

Search data

Housing seekers can search for properties on the Housing Hub without creating a housing seeker profile. When people use the Housing Hub and its search filters to look for properties, the Housing Hub collects de-identified data showing what people are searching for. To conduct a search, housing seekers need to select whether they are looking to rent or buy a property. Entering a location and specific housing preferences will narrow the search, however, these search filters are optional.

Similar to the profile data, search data for the current report was limited to all searches conducted within the previous 6 months, between 1 May 2022 - 1 November 2022. Moreover, only searches that specified a location were included in the current snapshot.[6] In total, this resulted in 69,048 searches being included in the current snapshot - an average of 11,508 searches per month. Given that search filters are optional, please note that the below analyses may not include all 69,048 searches. The number of searches included in the analyses is shown in the Figure titles.

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[6] This differs from the first 2 editions of the Housing Hub seeker snapshots, which included all housing searches that had been conducted on the Housing Hub, even if they did not specify a location.

NDIA data

The National Disability Insurance Agency (NDIA) collects and reports on data relating to all NDIS participants, including NDIS participants who are eligible for SDA (that is, housing seekers), as well as data about properties that are built and designed to be provided as SDA housing. This data is available on the NDIS website and is released quarterly.

Where this data is relevant to be viewed alongside the Housing Hub data, it is shown in this report. The current seeker snapshot refers to NDIA data from the latest quarterly report (Quarter 1 of the 2022-23 financial year; as of 30 September 2022).[7]

Listing data

The current seeker snapshot also refers to listing data to compare the demand data (i.e., search, profile and NDIA data) to supply. The listing data was taken from the most recently published Housing Hub listings snapshot.[8]

Listing data is collected as housing providers create property listings to advertise their vacancies. This data includes information about each property, such as features, images, property description, local area amenities and support provided. The most recent Housing Hub listings snapshot included data for all listings that were published as of 18 July 2022. This included a total of 2,142 listings. Please note that due to missing data, not all 2,142 listings may be shown in the below analyses.

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[7] NDIA (2022). *NDIS quarterly report to disability ministers: Q1 2022-2023*. National Disability Insurance Agency. **https://www.ndis.gov.au/about-us/publications/quarterly-reports**

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

Characteristics of housing seekers

Seekers who create a housing seeker profile on the Housing Hub tell us a little about themselves. This profile data is shown below.

Location of seekers

Similarly to the previous seeker snapshot reports,[9] the housing seekers predominantly reported being located on the east coast of Australia, with the majority of the seekers living in Victoria (41%). This was followed by Queensland (22%), New South Wales (17%), and South Australia (10%), respectively. See Figure 1.

Figure 1. Current location of seekers by state (profile data, n = 437)
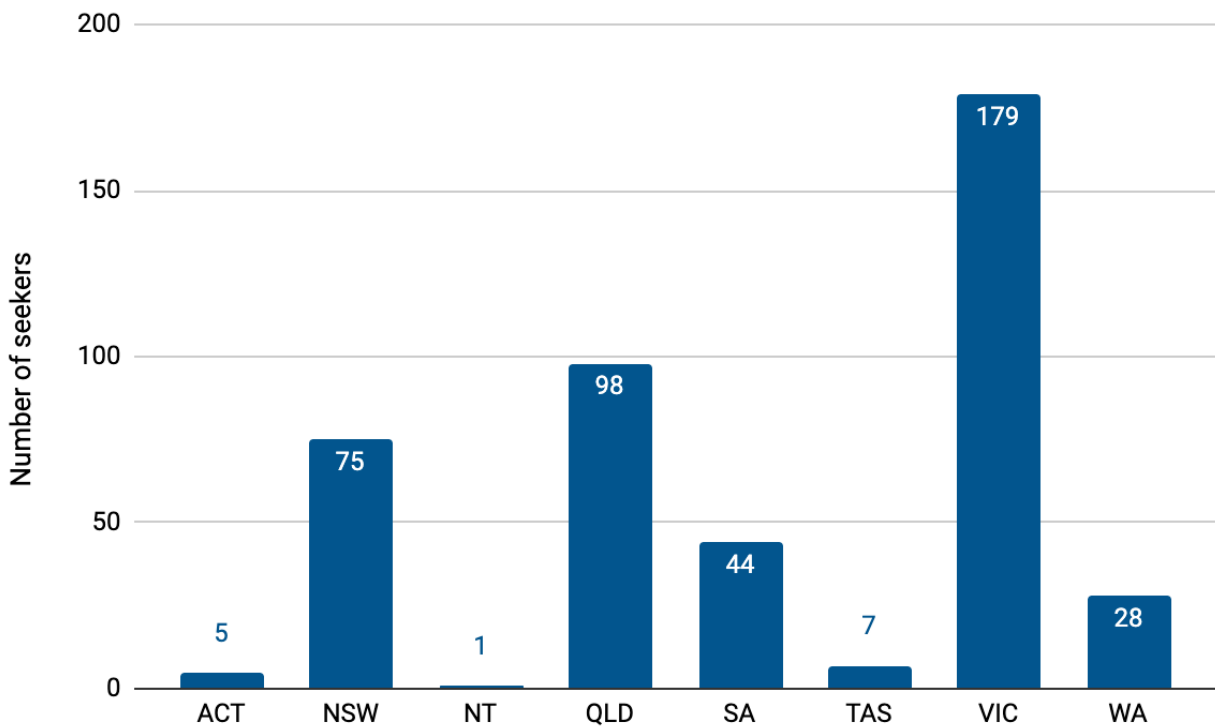
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[9] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

Usage data of the Housing Hub website also shows the location of housing seekers using the website – see Figure 2. The usage data over the past 6-months (May-November 2022) matched with the above east coast pattern, whereby Victoria, New South Wales, and Queensland had the highest usage rates.

Figure 2. Housing Hub website usage

Number of Housing Hub website uses between May-November:

168 � with gradient bar 42,679
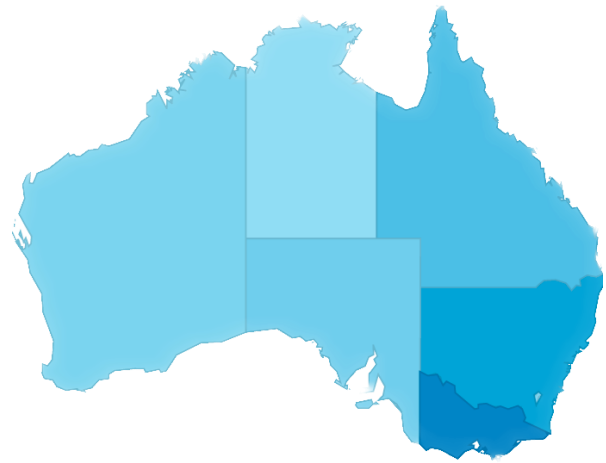
Age of seekers

Nearly all of the Housing Hub seekers were aged between 25-64 years (86%) - see Figure 3. The most common age groups were seekers aged between '25-34 years old' and '55-64 years old', with each group making up 23% of the Housing Hub seeker population. This was then followed by seekers aged between '35-44 years old' (21%) and '45-54 years old' (19%). Interestingly, compared to the previous seeker snapshot, there appeared to be slightly less seekers aged between 18-24 years old (10%).

Figure 3. Age range of seekers (profile data, *n* = 405)
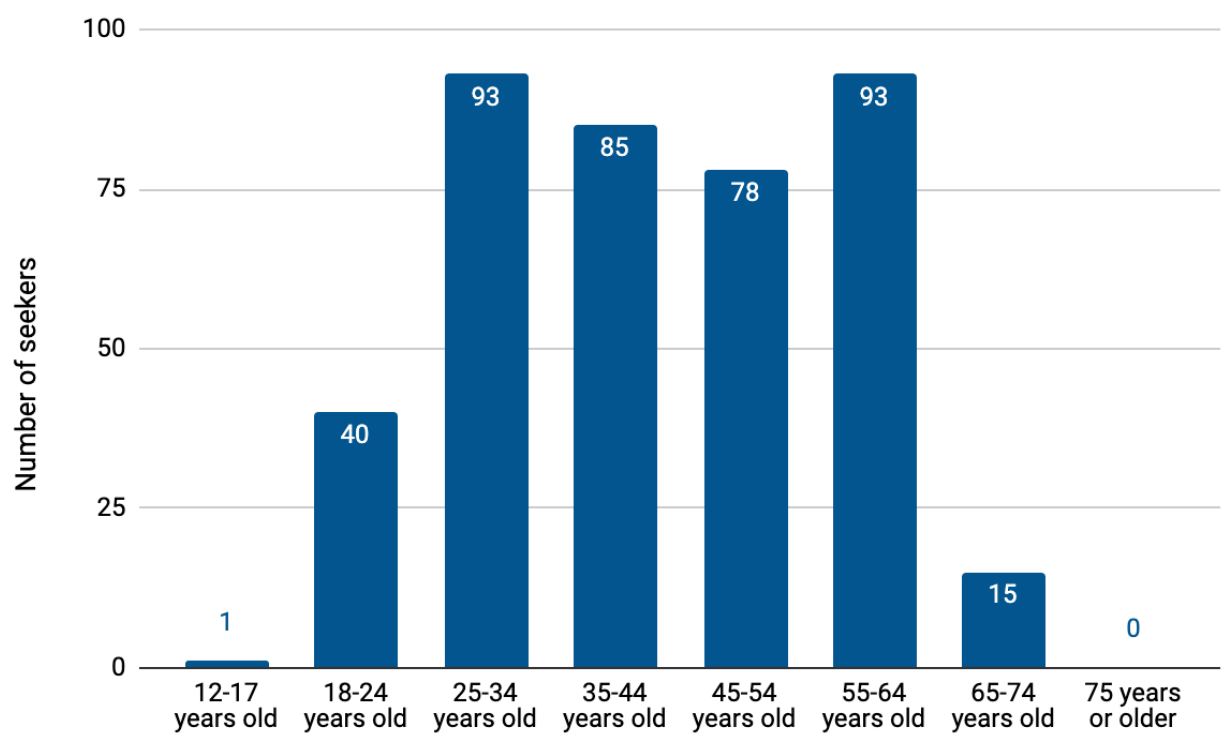
Disability type

Aligning with previous seeker snapshot reports,[10] the most common primary disability type reported by seekers was Autism (13%) - see Figure 4. This was followed by disabilities categorised as Psychological (12%), Other Physical (10%), Other Intellectual (10%), and Acquired Brain Injury (9%).

Figure 4. Primary disability type of seekers (profile data, *n* = 387)

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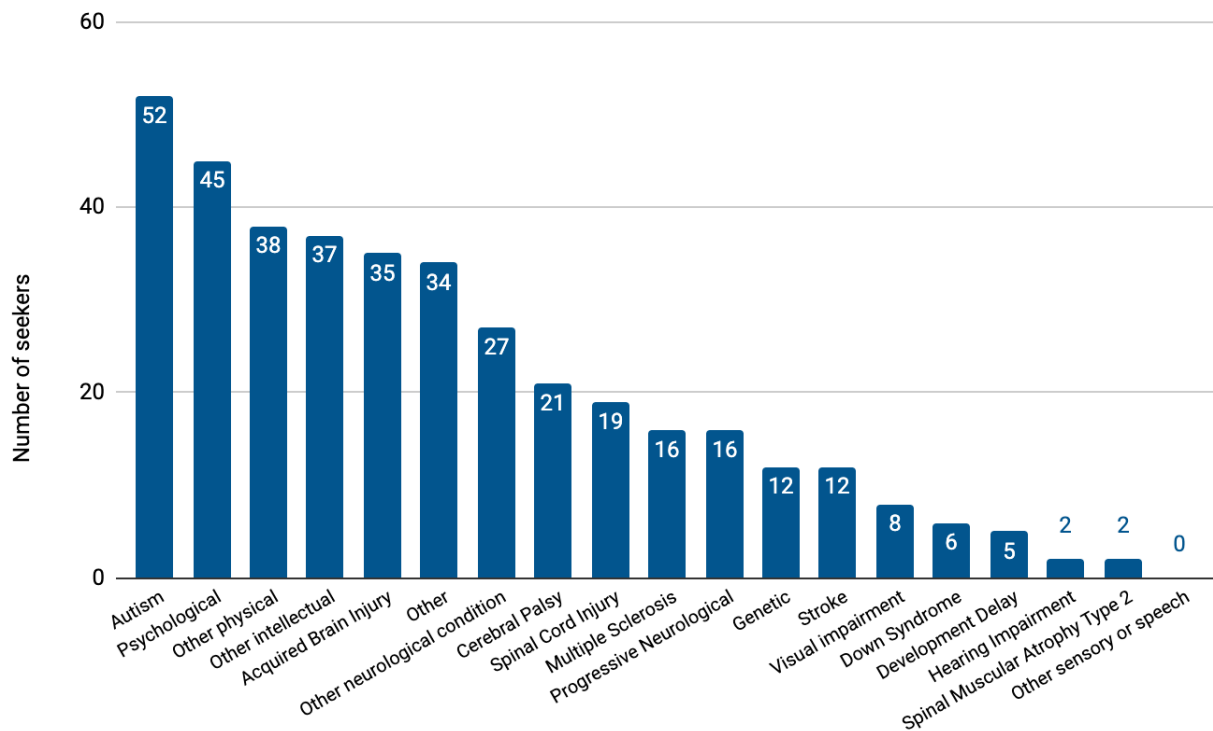
[10] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

Current housing situation

Living in private homes was the predominant housing situation among seekers, as 55% of seekers lived in either private rentals (23%), privately owned (22%), or public rental (10%) housing - see Figure 5. No seekers reported living in boarding houses or hostels. In contrast to the last seeker snapshot,[11] housing seekers were privately renting homes slightly more than owning their own homes.

Figure 5. Current housing situation of seekers (profile data, *n* = 69)

Note: Small residential dwellings are defined as housing for less than 20 people; large residential dwellings are for more than 20 people.

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[11] Wellecke et al. (2022, June). *Housing seeker snapshot.* Housing Hub and Summer Foundation

The majority of seekers (67%) were either 'very unsatisfied' or 'unsatisfied' with their current living arrangements, with only 17% of seekers indicating that they were 'satisfied' or 'very satisfied' with their housing - see Figure 6.

Figure 6. Current seeker satisfaction of housing situation (profile data, *n* = 65)
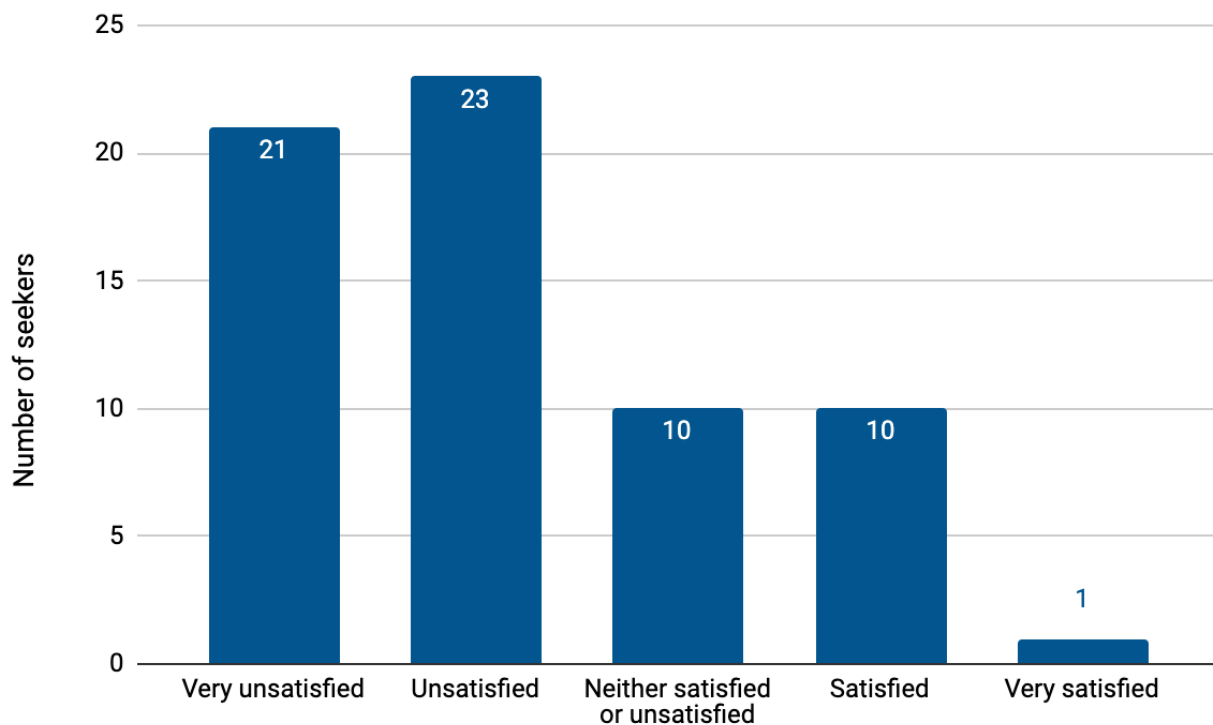
Seekers' satisfaction levels with their current housing were also compared to those reported in previous seeker snapshots from May 2021, December 2021, and June 2022 - see Figure 7.[12] When compared over time, seekers' satisfaction levels appeared to have remained relatively similar across the editions of seeker snapshots.

However, slight differences in percentages were evident when comparing the current seeker snapshot to the last snapshot in June 2022. In the current snapshot, there was a slight increase in the percentage of seekers that were 'satisfied' (increase of +4% points), and a minor decrease in the percentage of seekers that were 'unsatisfied' (decrease of -3% points). However, it also appears that there was a slight increase in the seekers who were 'very unsatisfied' (increase of +2% points), and a decrease in seekers who were 'very satisfied' (decrease of -4% points). Therefore, there is no clear trend to suggest that satisfaction levels are increasing or decreasing, demonstrating that seekers' satisfaction with their housing arrangements is possibly stagnant. It is important to note that the comparison between satisfaction levels over time should be interpreted with caution, as there were large differences between the profile data available between May 2021 to November 2022.
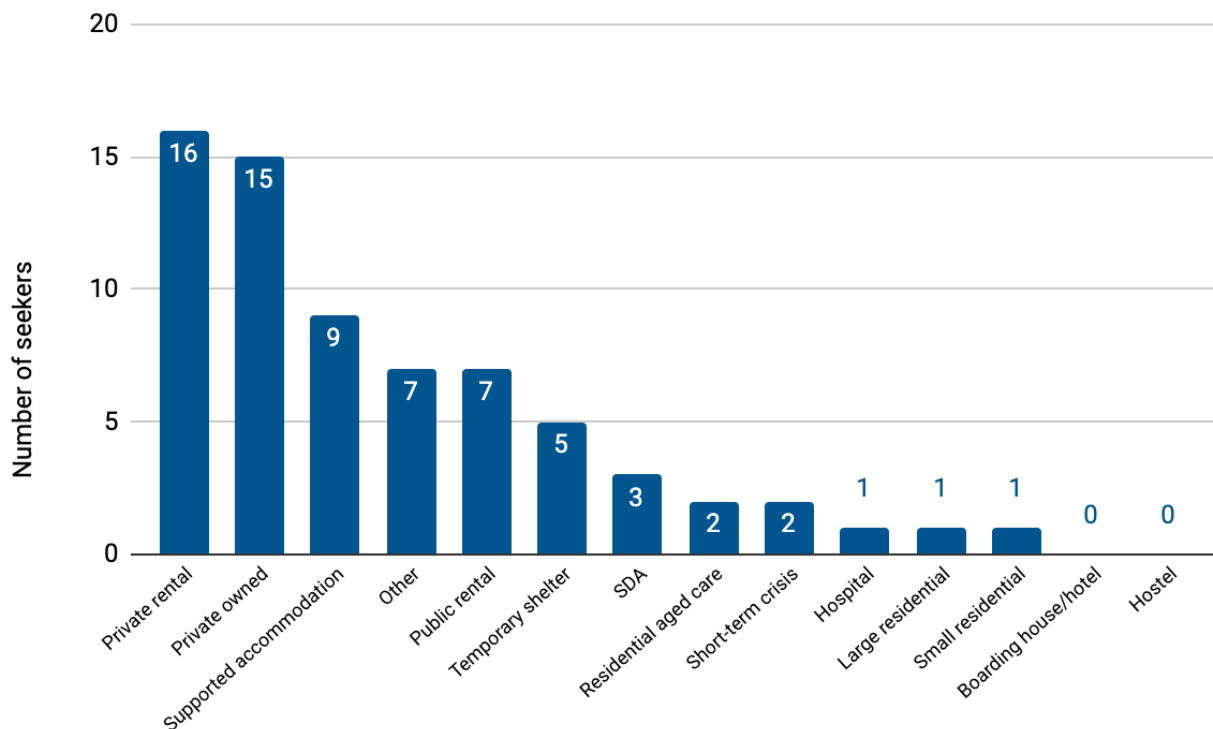
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[12] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

Figure 7. Satisfaction of seekers with their current living arrangements across time (profile data from all 4 editions of the seeker snapshot)
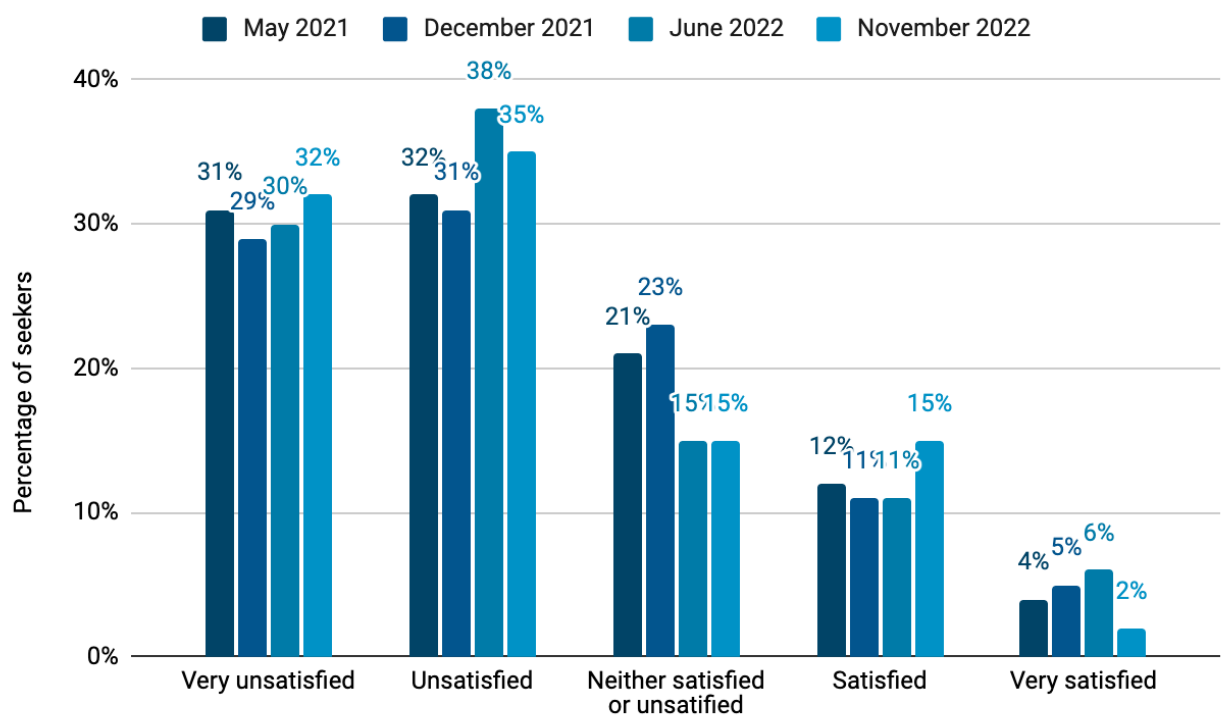
Note: *May 2021 = 819 profiles; December 2021 = 374 profiles; June 2022 = 82 profiles; November 2022 = 65 profiles.*

Needs and preferences of housing seekers

The data presented on the needs and preferences of housing seekers utilises both Housing Hub seeker profiles and Housing Hub website searches. As the volume of searchers is larger than the number of profiles, the profile data and search data are compared using percentages of each respective total. To compare the profile and search data from the Housing Hub website to the NDIA data, percentages are also used.

Needs and preferences for housing arrangements

As illustrated in Figure 8, most seekers were looking for rental properties - approximately 92% of searches on the Housing Hub were conducted for SDA properties and 85% of profiles were for SDA seekers. When combining search and profile data, 92% of all seekers indicated a need for rental properties. This data is consistent with previous seeker snapshot reports,[13] which also illustrated that the majority of seekers were looking to rent.

Figure 8. Seekers looking to rent or buy a property (*n*= 69,048 searches; *n* = 872 profiles)
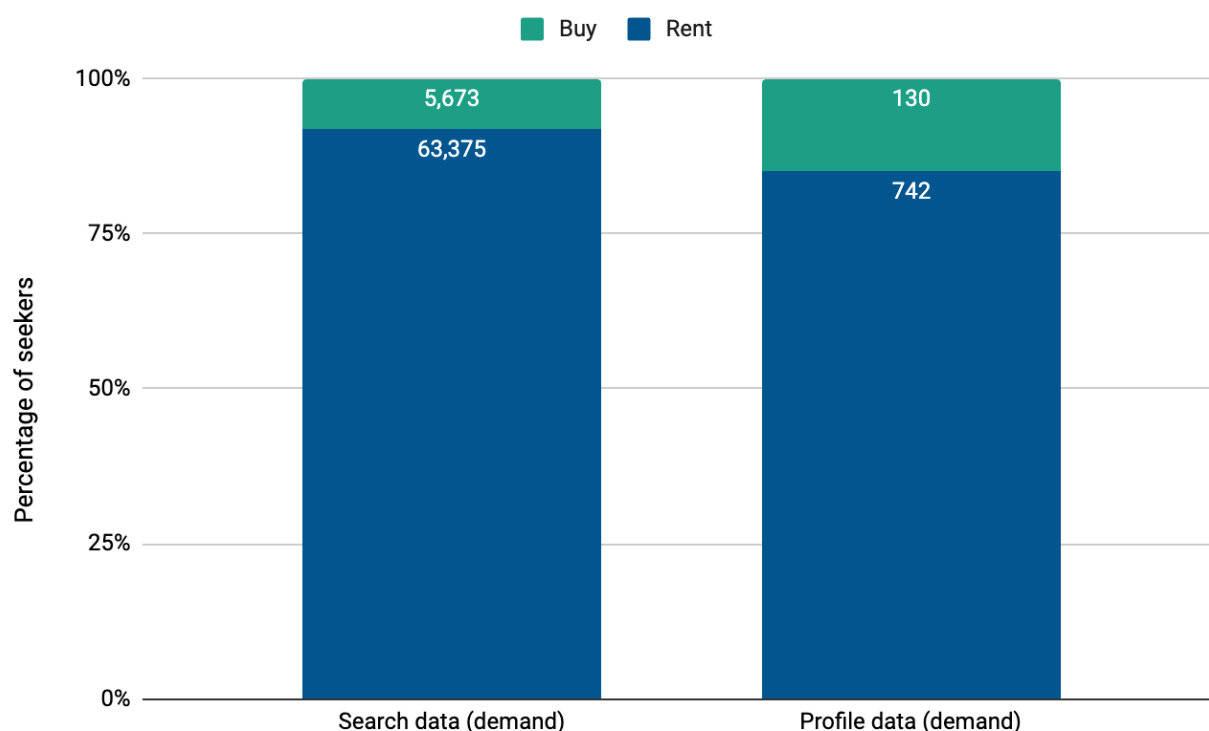
Consistent with the seekers' preference of predominantly looking to rent a property, the listing data demonstrates a larger amount of available properties to rent rather than buy - see Figure 9. However, the demand for purchasing properties appears less well-matched to the available supply. Although less than 10% of seekers were looking for properties to buy, only a very small number of properties were currently offered for sale (0.2%). This demonstrates a lack of supply of properties available to purchase on the

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[13] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

Housing Hub, meaning it is likely that seekers looking to buy will have considerable difficulty finding suitable properties that suit their needs.

Figure 9. Supply and demand of rental properties compared to properties for sale (n = 69,048 searches; n = 872 profiles; n = 2,140 listings)
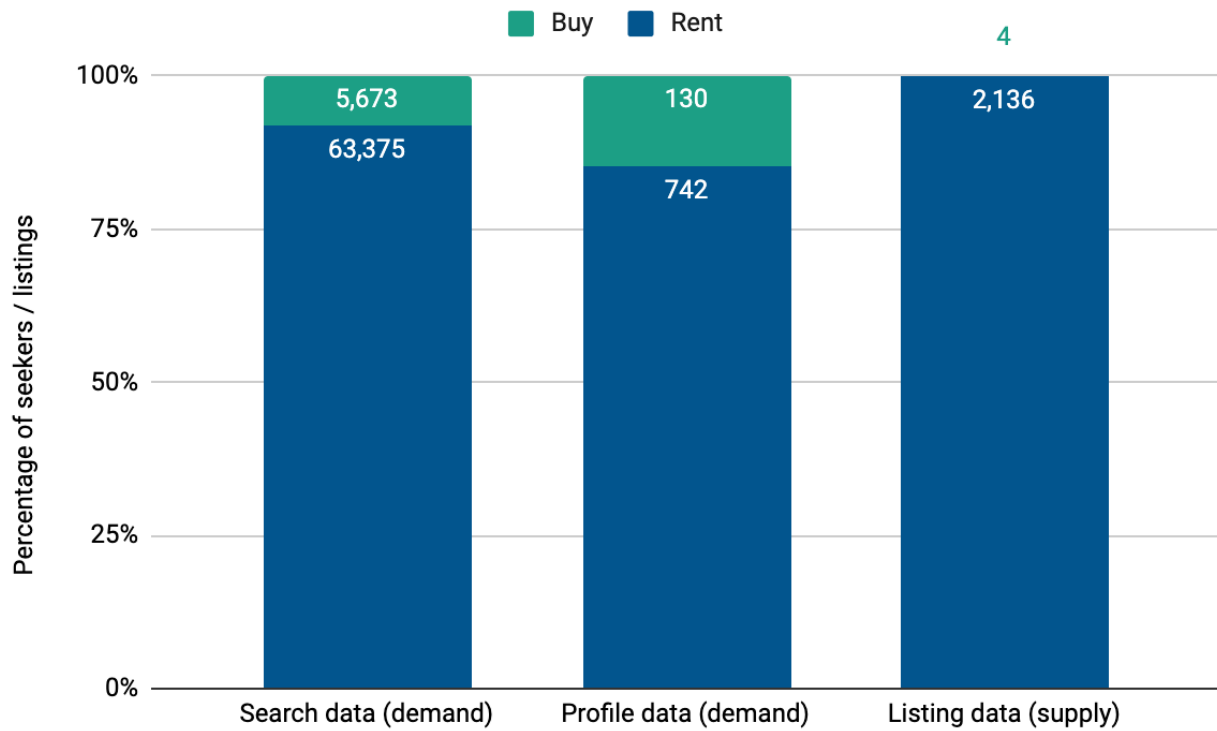
In terms of preferred rental terms, 74% of seekers were looking for ongoing leases as opposed to medium or short term rentals - see Figure 10. This is consistent with the supply of rental properties available on the Housing Hub, as the majority of the properties were offered on ongoing leases (87%).

Demand for short or medium term leases was substantially lower than demand for ongoing leases, with only one-quarter (26%) of seekers looking for short or medium term options. Although the demand for short or medium term leases was relatively low, it appeared to exceed the available supply - only 13% of available properties on the Housing Hub were offered on short or medium term leases. These findings demonstrate that short and medium term rental seekers may have challenges in finding appropriate housing.

Figure 10. Seekers preferred rental term and supply of different rental term properties (*n* = 21,537 data points from searches; *n* = 2,135 listings)
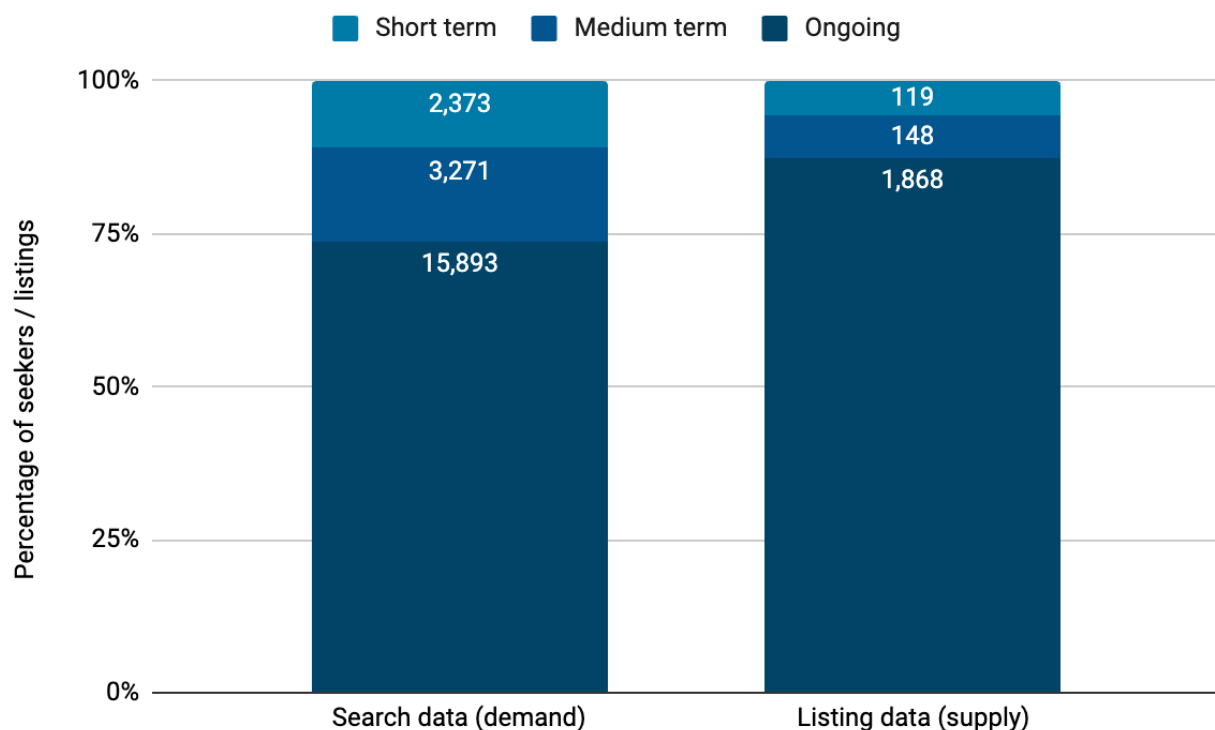
Note: Seekers were able to select multiple options when conducting a search.

As seen in Figure 11, the preferences regarding who seekers would like to live with were consistent between the search data and profile data. The majority of seekers stated they would prefer to live by themselves (43% = search data, 42% = profile data), with a very minimal number of seekers stating they would share a house with people who do not have a disability (5% = search data, 4% = profile data). Results from the previous seeker snapshots[14] also illustrated that nearly half of all seekers would like to live on their own, further emphasising that most seekers are regularly looking for accessible housing that

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[14] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

will enable independent living. Although most seekers appear to be looking for independent living options, recent survey findings have demonstrated that the NDIA has been shifting away from approving SDA funding for single-occupant dwellings,[15] despite there being a large number of single-occupant dwellings in the pipeline for construction.[16]

Some differences regarding preferred living arrangements arose between the search and profile data, such as more profiles indicating a preference to live with family and/or partners (21%), compared to the seekers from the search data (14%). Additionally, seekers from the search data demonstrated a larger preference to live with other people with disability (38%), compared to the profile data (33%).

Figure 11. Seekers' preferred living arrangements (*n* = 24,028 data points from searches; *n* = 676 profiles)
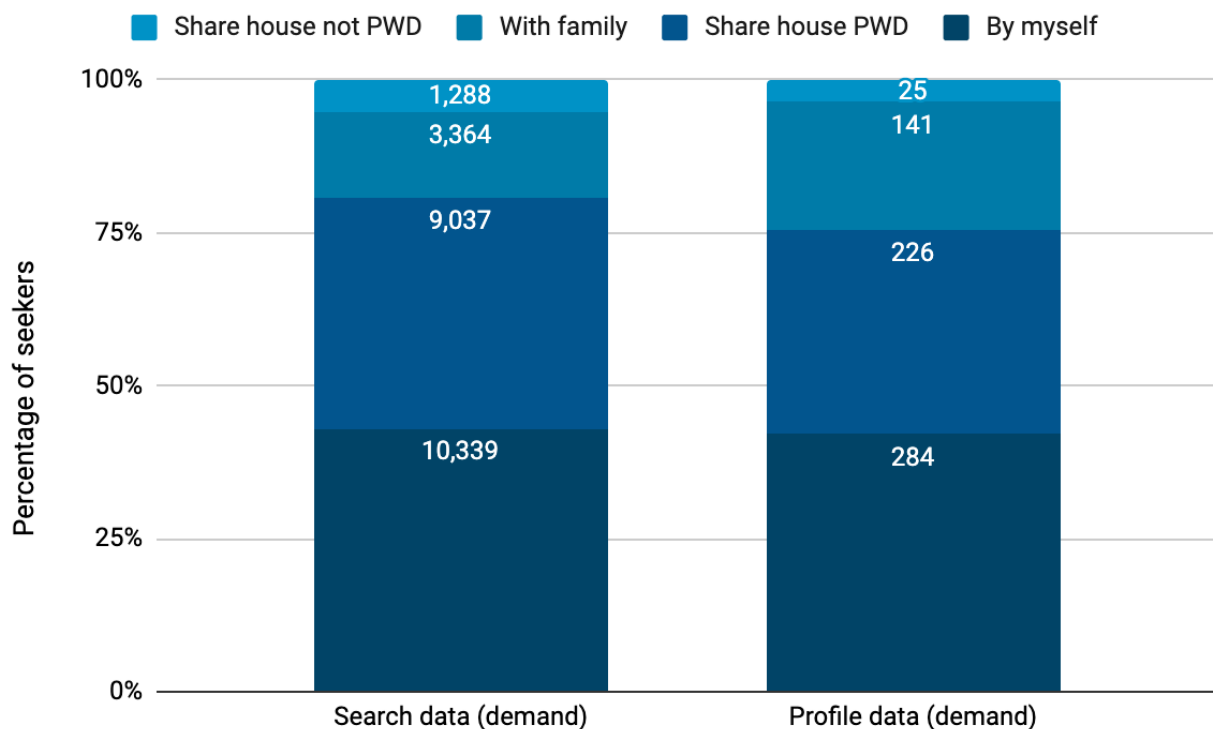
Note: Seekers were able to select multiple options when conducting searches.

Aligning with the previous editions of the seeker snapshots,[17] over half of the seekers (57%) would like to move immediately - see Figure 12. This was followed by moving within 6 months (25%), 12 months (8%), 24+ months (7%), and lastly between 12-24 months (3%). This illustrates that there is a high demand for properties that are immediately available to move into.

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[15] Wellecke et al. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation; Aimers et al. (2022). *CHPs and disability housing: An exploration of SDA*. Housing Hub and Summer Foundation; Aimers et al. (2021, November). *Specialist Disability Accommodation – Supply in Australia*. Housing Hub and Summer Foundation; Winkler et al. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation.

[16] Wellecke et al. (2022). *Specialist disability accommodation supply in Australia*. Housing Hub and Summer Foundation; Aimers et al. (2021). *Specialist Disability Accommodation – Supply in Australia*. Housing Hub and Summer Foundation.

[17] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

Figure 12. Seekers' preference for when to move (profile data, *n* = 61)
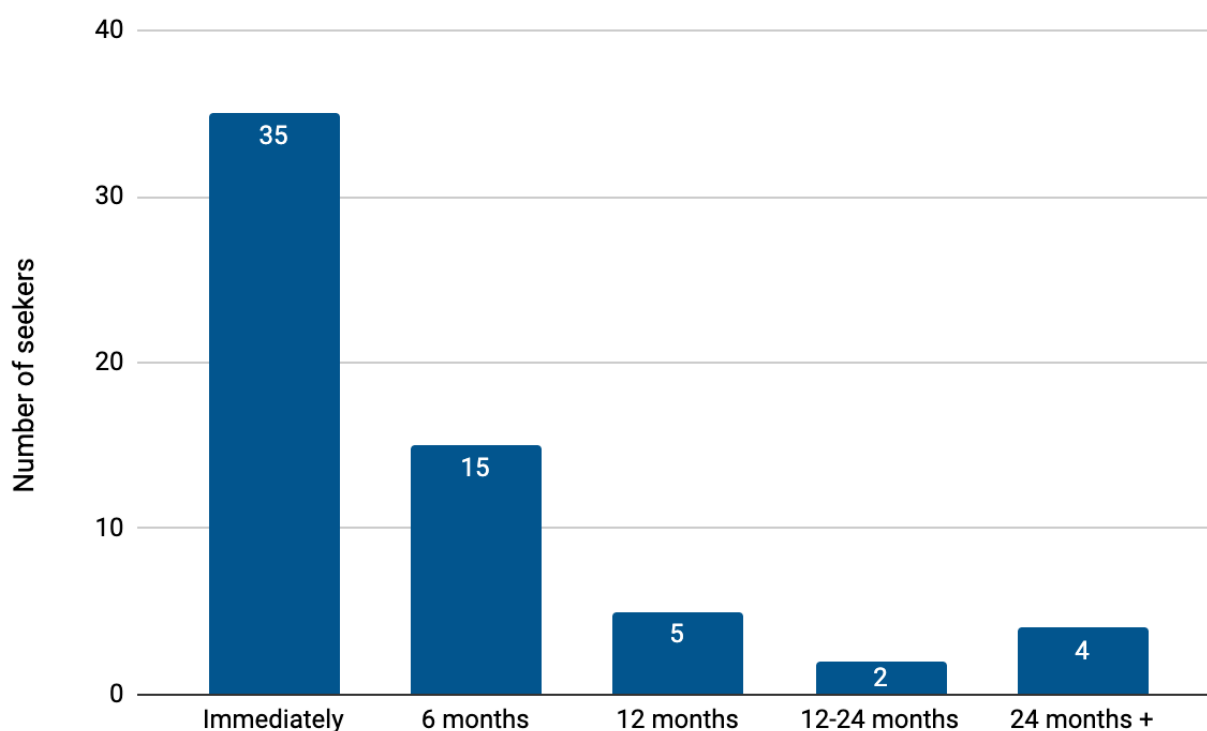
The search data demonstrated that more than a third of seekers (36%) need support 24 hours a day (see Figure 13), which is consistent with previous seeker snapshot reports.[18] This was followed secondly by seekers requiring support via an onsite shared support (26%), and thirdly with no support needed as seekers will bring their own support (25%). A small number of seekers indicated that they only required day support (8%) or only evening support (5%), with no seekers reporting that they did not require any support at all.

The findings suggest that there are 3 vital types of housing and support being sought by seekers - (1) housing that comes with 24-hour onsite support, (2) housing that has onsite shared support, and (3) housing that allows the seeker to have full choice over the support brought into the property. Since the type of support being sought varied from being able to bring one's own support to needing 24-hour onsite support, the findings indicate a great spectrum in support provision that needs to be recognised by the market.

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[18] Ibid.

Figure 13. Seekers' support needs (search data, *n* = 24,377 data points)
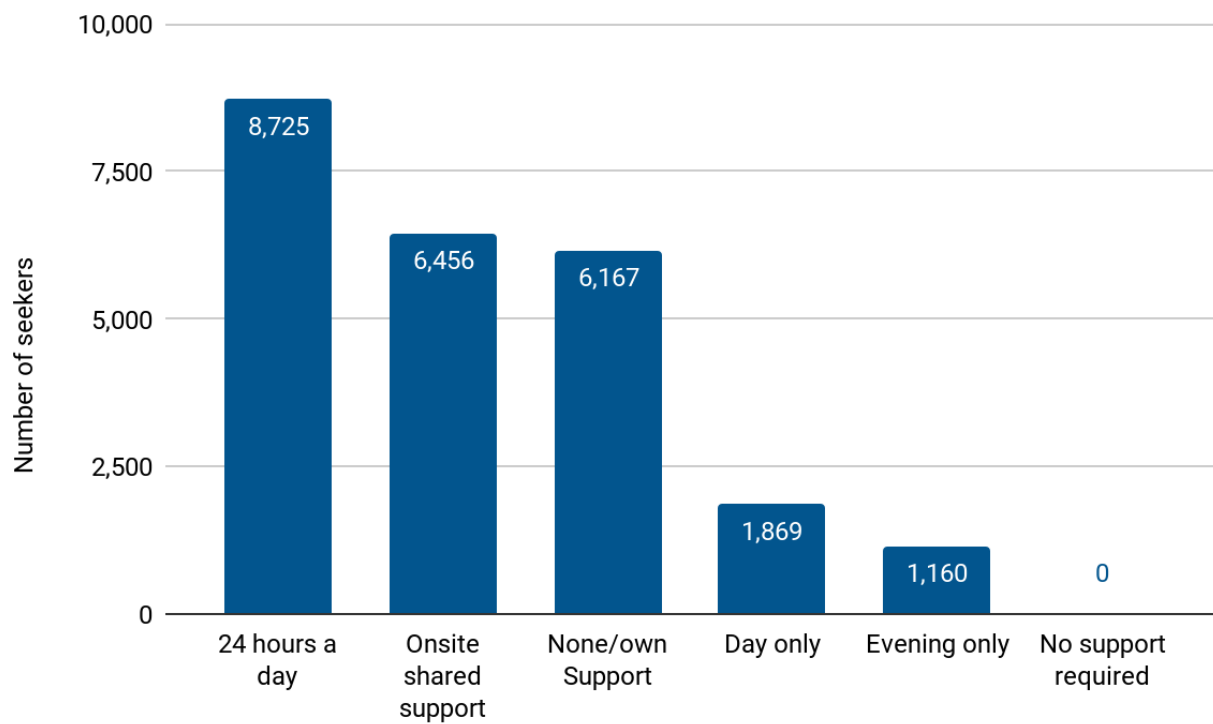
Note: Seekers were able to select multiple options.

The support options offered by property listings are compared to the seekers search data in Figure 14. The type of support provided by the property listings appears to be largely consistent with the seekers' support preferences, with the majority of listings offering 24-hour onsite support (57%). However, only a small percentage of listings (10%) offered no support or allowed seekers to bring their own support, compared to the 25% demand of seekers who are looking to bring their own support to the property. This discrepancy shows that seekers looking to bring their own support will have a lower volume of housing options available than those seeking 24-hour onsite support housing options.

Figure 14. Comparison of seekers' support needs to type of support provided by the property listings (*n* = 24,377 data points from searches; *n* = 2,808 data points from listings)*
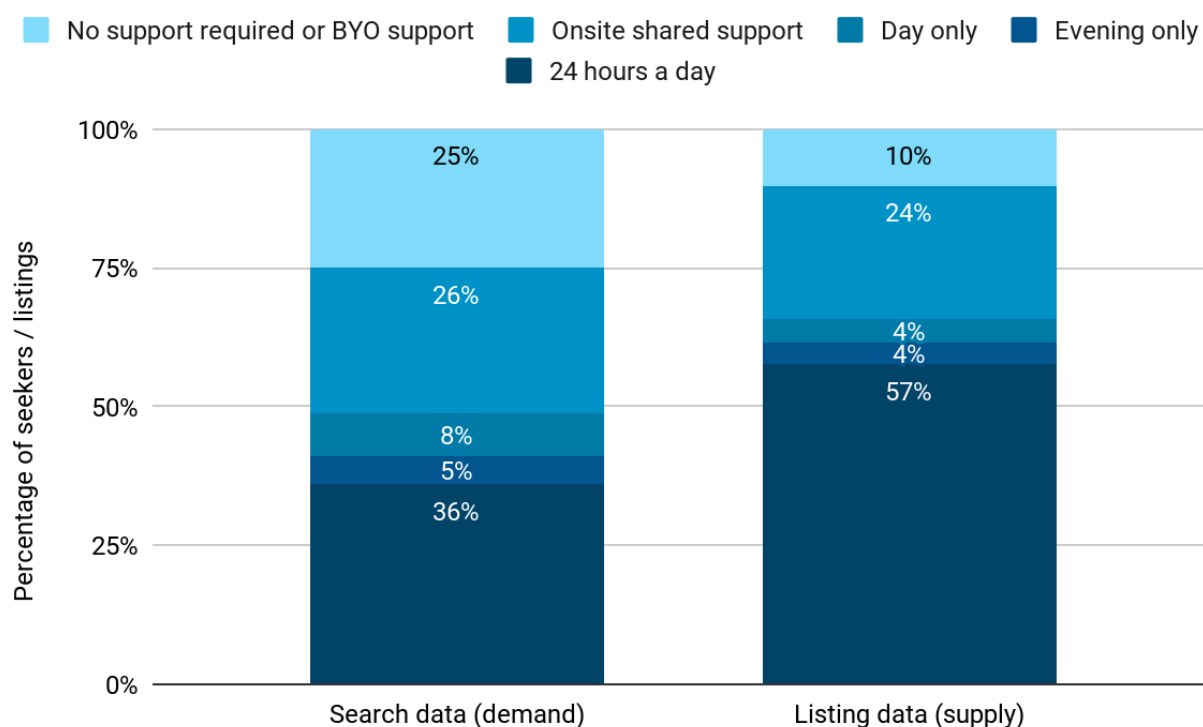
Note: Seekers and listings could indicate multiple support options. Search data had 1 support category called 'concierge on site' - this was renamed as 'onsite shared support' to enable comparison between listing and search data, as this type of support is considered the same.

Preferences for SDA properties

Across the search data, a large number of seekers were looking for SDA properties (62%) compared to non-SDA properties - see Figure 15. This represents an increase in seeking SDA properties compared to previous seeker snapshots,[19] which consistently demonstrated an even split between seekers requiring SDA versus non-SDA homes. Interestingly, this increase was not evident in profile data, which demonstrated that seekers slightly favoured non-SDA homes (51%).

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[19] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

Figure 15. Seekers' need for SDA and non-SDA properties (*n* = 23,315 searches; *n* = 1,461 profiles)
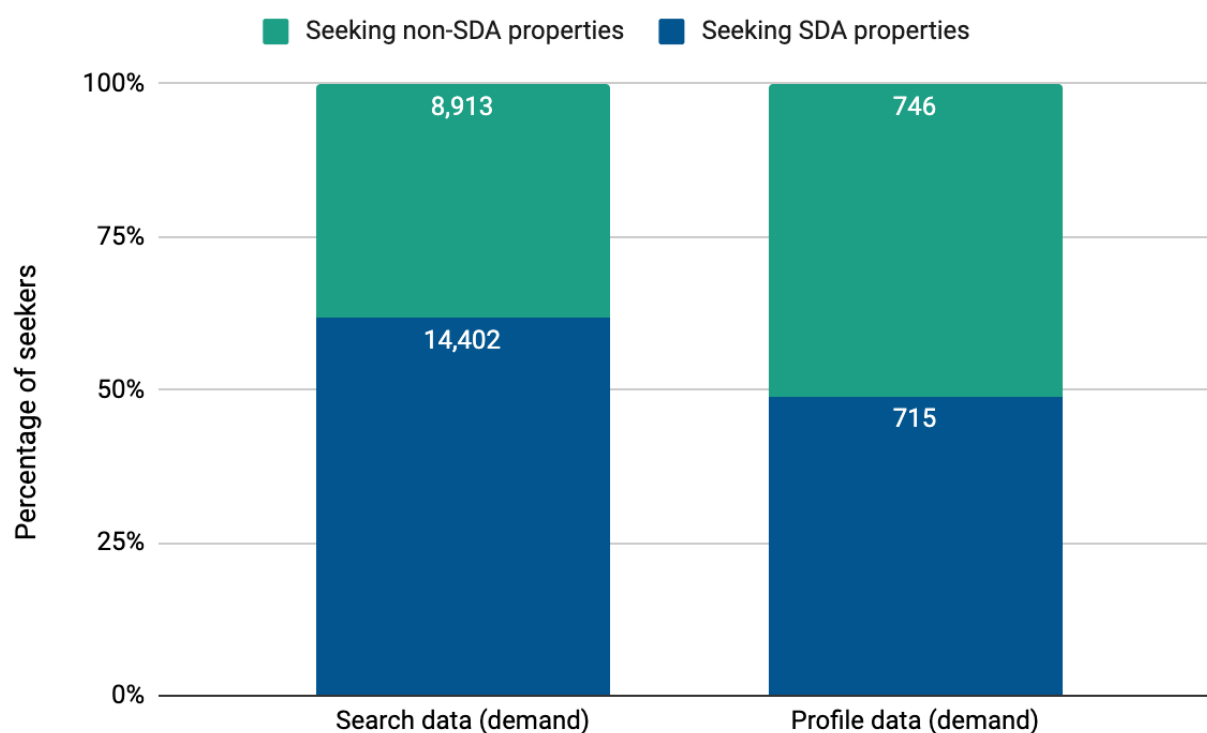
In terms of proportions, the property listings were consistent with the seekers' preference towards SDA housing, as the majority of the listings offered were SDA housing (65%) - see Figure 16. However, it is important to acknowledge that the *number* of SDA listings (1,402) substantially exceeded the number of seeker profiles for SDA properties (715). As it is not mandatory for seekers to create a profile when searching for properties on the Housing Hub website, this may explain the difference between the number of SDA listings and seeker profiles. Regardless, there do not appear to be enough SDA seekers to match the available SDA supply on the Housing Hub. This reinforces previous research findings that have highlighted the importance of the NDIA to further activate demand for SDA.[20]

Discrepancies between the supply and demand for non-SDA housing were also evident. Although more than a third of searches (38%) and over half of seeker profiles (51%) indicated a desire for non-SDA housing, there was slightly less supply of non-SDA housing available on the market (35%). This suggests that seekers looking for non-SDA housing may have difficulties finding appropriate housing.

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[20] Wellecke et al. (2022). *Specialist disability accommodation supply in Australia*. Housing Hub and Summer Foundation; Wellecke et al. (2022). *Specialist Disability Accommodation provider experience survey*. Housing Hub and Summer Foundation; Aimers et al. (2021). *Specialist Disability Accommodation – Supply in Australia*. Housing Hub and Summer Foundation; Winkler et al. (2021). *Specialist Disability Accommodation Provider Experience Survey*. Housing Hub and Summer Foundation.

Figure 16. Seekers' need for SDA and non-SDA properties (*n* = 23,315 searches; *n* = 1,461 profiles; *n* = 2,142 listings)
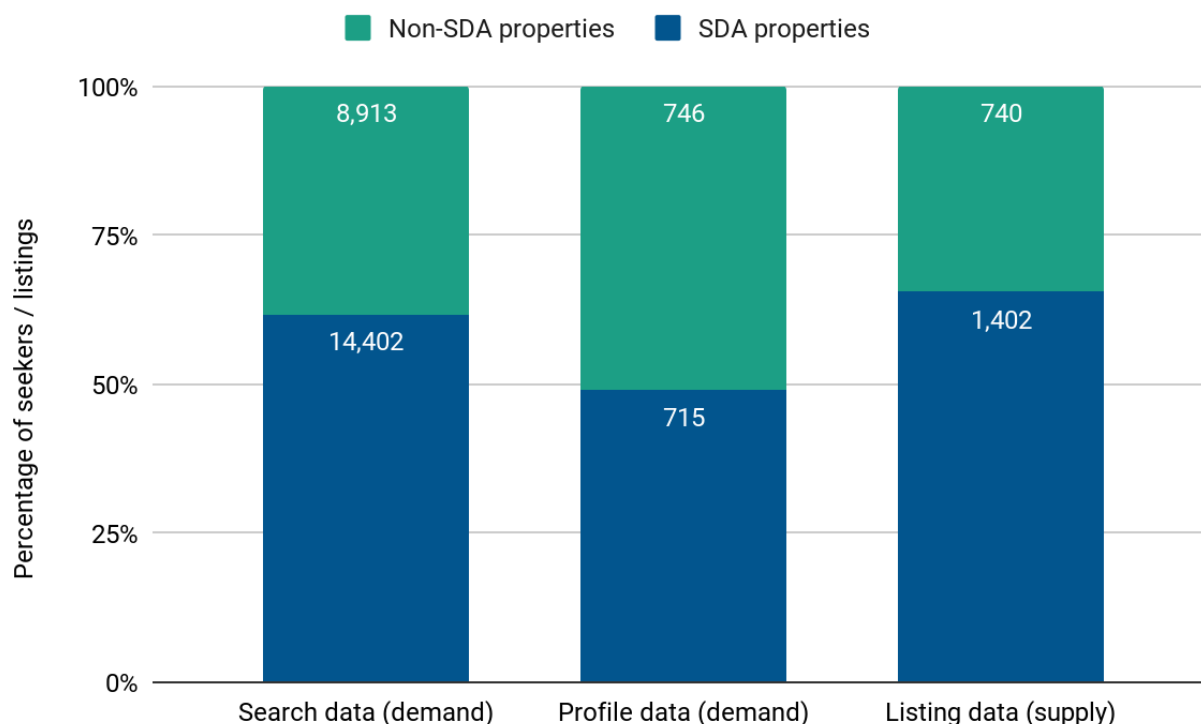

Within the SDA properties, there are 5 different design categories: High Physical Support, Fully Accessible, Robust, Improved Liveability, and Basic. Each category consists of different design features and is supported by additional funding in people's NDIS plans. Older SDA properties that do not have any special design features may be enrolled as 'Basic', but this category is not available for New Build SDA. As NDIS participants with SDA funding are generally aware of the SDA design category that they have been funded to live in, it is likely that seekers will select the appropriate design category when searching for housing on the Housing Hub website.

Figure 17 illustrates the SDA design categories that seekers were looking for according to the search data and profile data. This is shown alongside NDIA data from the latest quarterly report, showing the number of NDIS participants seeking SDA properties by design category.[21]

As demonstrated in Figure 17, the seekers' need for certain SDA design categories varied across the search, profile and NDIA data. The search data indicated that seekers searched most for High Physical Support (36%), followed by Improved Liveability (23%) design categories. Contrastingly, the Housing Hub profiles most commonly had a preference for Improved Liveability (28%), followed closely by Fully Accessible (28%) design categories. Similarly, the NDIA data also showed that Improved Liveability (39%) was the most required design category, with High Physical Support (31%) being the second most required design. The least searched designs across the search, profile, and NDIA data were Robust and Basic.

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[21] NDIA (2022). *NDIS quarterly report to disability ministers: Q1 2022-2023*. National Disability Insurance Agency. Table P.12. Downloaded 07/11/2022. **https://www.ndis.gov.au/about-us/publications/quarterly-reports**

Figure 17. Seekers' need for SDA design categories (*n* = 18,263 data points from searches; *n* = 439 profiles; *n* = 4,295 SDA seekers according to NDIA data)
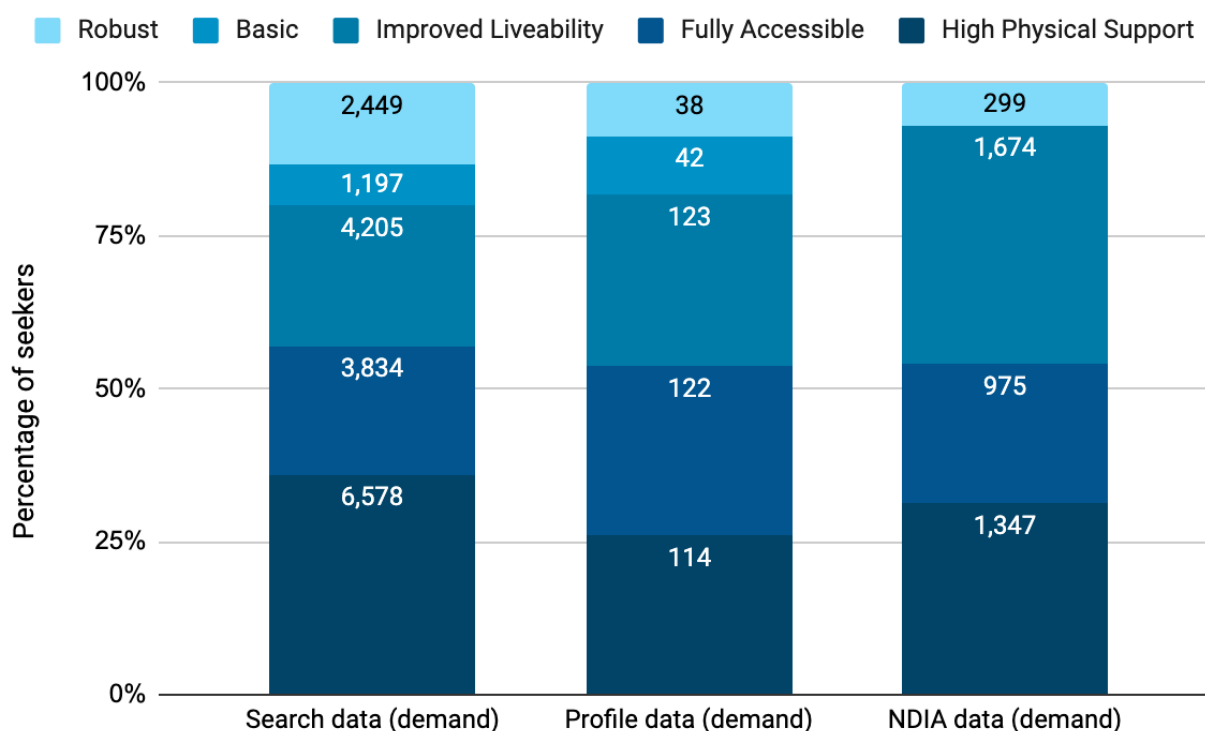
Note: The NDIA does not report on demand from participants seeking Basic design categories. Seekers were able to select multiple options when conducting a search on the Housing Hub.

Figure 18 also illustrates the SDA design categories that seekers were looking for according to the search data, profile data and NDIA data, whilst also compared to the listing data available on the Housing Hub website. The listing data demonstrates that the majority of Housing Hub's listings were High Physical Support properties (43%), which slightly exceeded the demand for this design category.

Conversely, the small percentage of Improved Liveability (16%) properties and Fully Accessible (17%) properties was largely inconsistent with the seekers' preference for these design categories. Overall, the incongruence between the listing and various seekers' data regarding their preference for SDA design categories is concerning, especially for people seeking Improved Liveability or Fully Accessible homes. This may disadvantage seekers when trying to find appropriate homes that fit their SDA funding and nominated SDA category, as well as, meet their general housing needs and preferences. However, it is important to note that some providers have acknowledged in previous research that some SDA properties were not exclusive nor limited to a particular design category (i.e., the provider may accept Fully Accessible funded tenants in a High Physical Support dwelling).[22] Hence, the discrepancy between the search and listings data for the design category should be interpreted with caution.

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[22] Wellecke et al. (2022). *Specialist disability accommodation supply in Australia*. Housing Hub and Summer Foundation; Aimers et al. (2021). *Specialist Disability Accommodation – Supply in Australia*. Housing Hub and Summer Foundation.

Figure 18. Seekers' need for SDA design categories in comparison to SDA listings (*n* = 18,263 data points from searches; *n* = 439 profiles; *n* = 4,295 SDA seekers according to NDIA data; *n* = 1,396 listings)
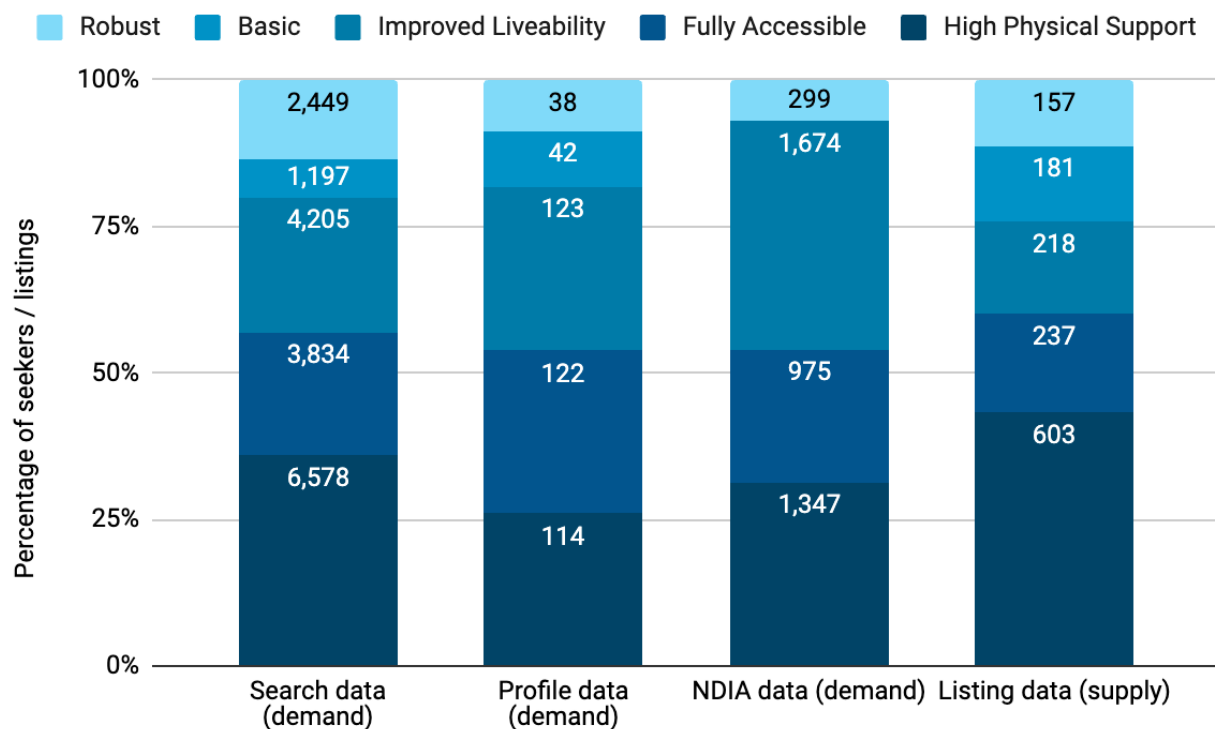

Note: The NDIA does not report on demand from participants seeking Basic design categories. Seekers were able to select multiple options when conducting a search on the Housing Hub.

Preferred location for SDA

When making a profile on the Housing Hub website, seekers are given an option to select their preferred location on where they would like to reside. This allows seekers to be given digital alerts when housing in these locations becomes available to rent or buy. See Figure 19 for the preferred areas selected by seekers of SDA properties.

Most seekers preferred locations along the east coast, particularly in Victoria, which is consistent with the majority of seekers being located on the east coast as referred to in Figures 1 and 2. Many of the seekers were looking for housing among the capital cities, with an increasing demand in regional housing being apparent.

Figure 19. SDA seekers' preferred living locations (profile data, *n* = 1,900)
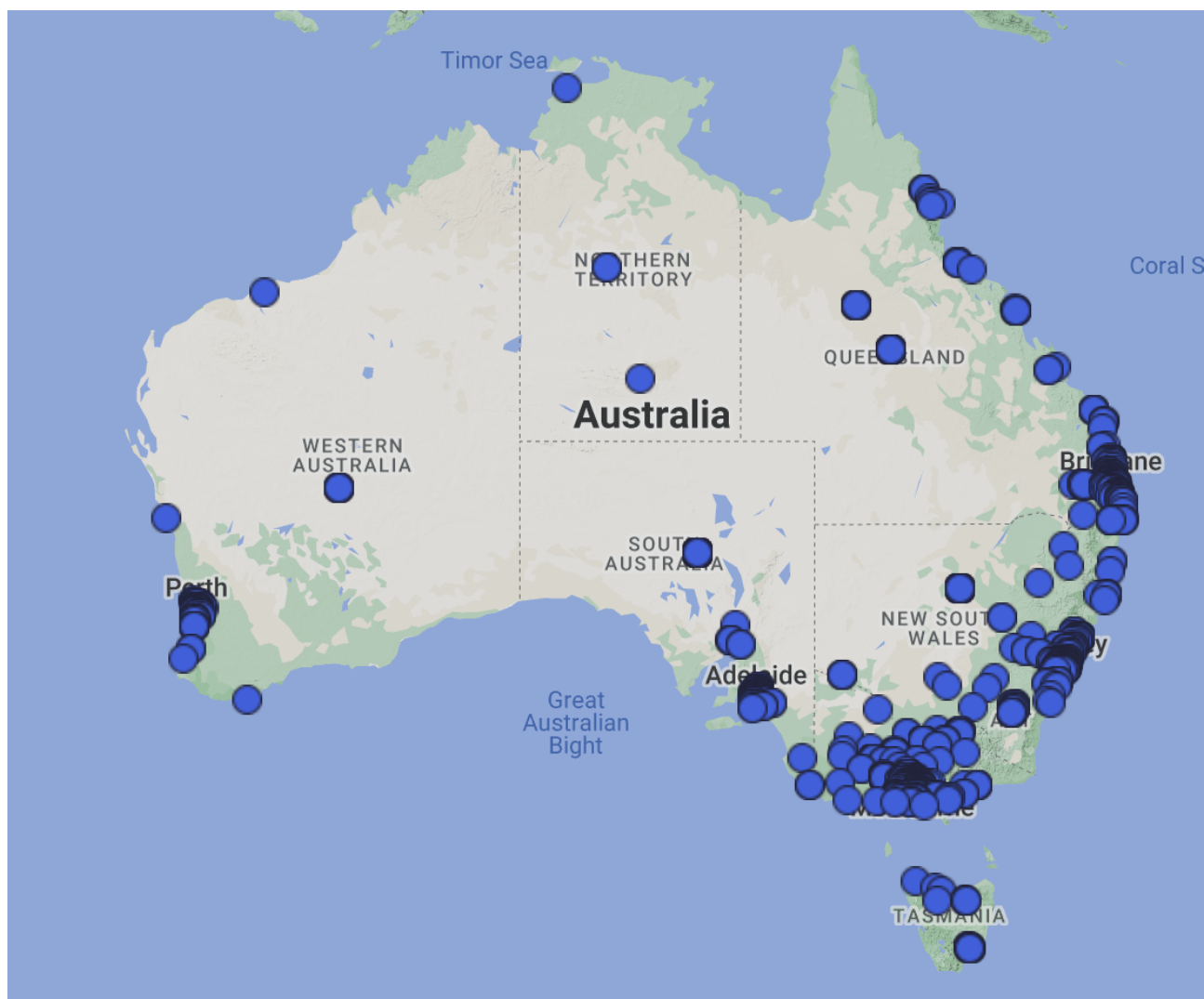
Note: Unlike other analyses in this snapshot, this map captures all seeker profiles that have ever been created on the Housing Hub and is not limited to profiles that have been updated within the past 6 months.

Figure 20 examines the current SDA listings available (green circles) in comparison to the preferred locations of SDA seekers (blue circles). The preferred locations of the seekers generally aligned with the available listings on the Housing Hub. Although, it is evident that more housing development is needed to meet the demand for housing in some regional areas.

As previously reported,[23] it is possible that housing will need to be developed for individuals in regional areas by directly connecting seekers with providers, enabling providers to build housing to the needs and preferences of housing seekers in those locations. To meet this need, the Housing Hub is working with housing providers who can commit to developing housing for people based on their needs – known as building for demand. This represents a positive development in the SDA market, which has been largely supply-led to date.

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[23] Wellecke et al. (2022, August). *Housing Hub listings snapshot*. Housing Hub and Summer Foundation.

Figure 20. Seekers' preferred living locations and listing locations (*n* = 1,900 profiles; *n* =1,587 listings)
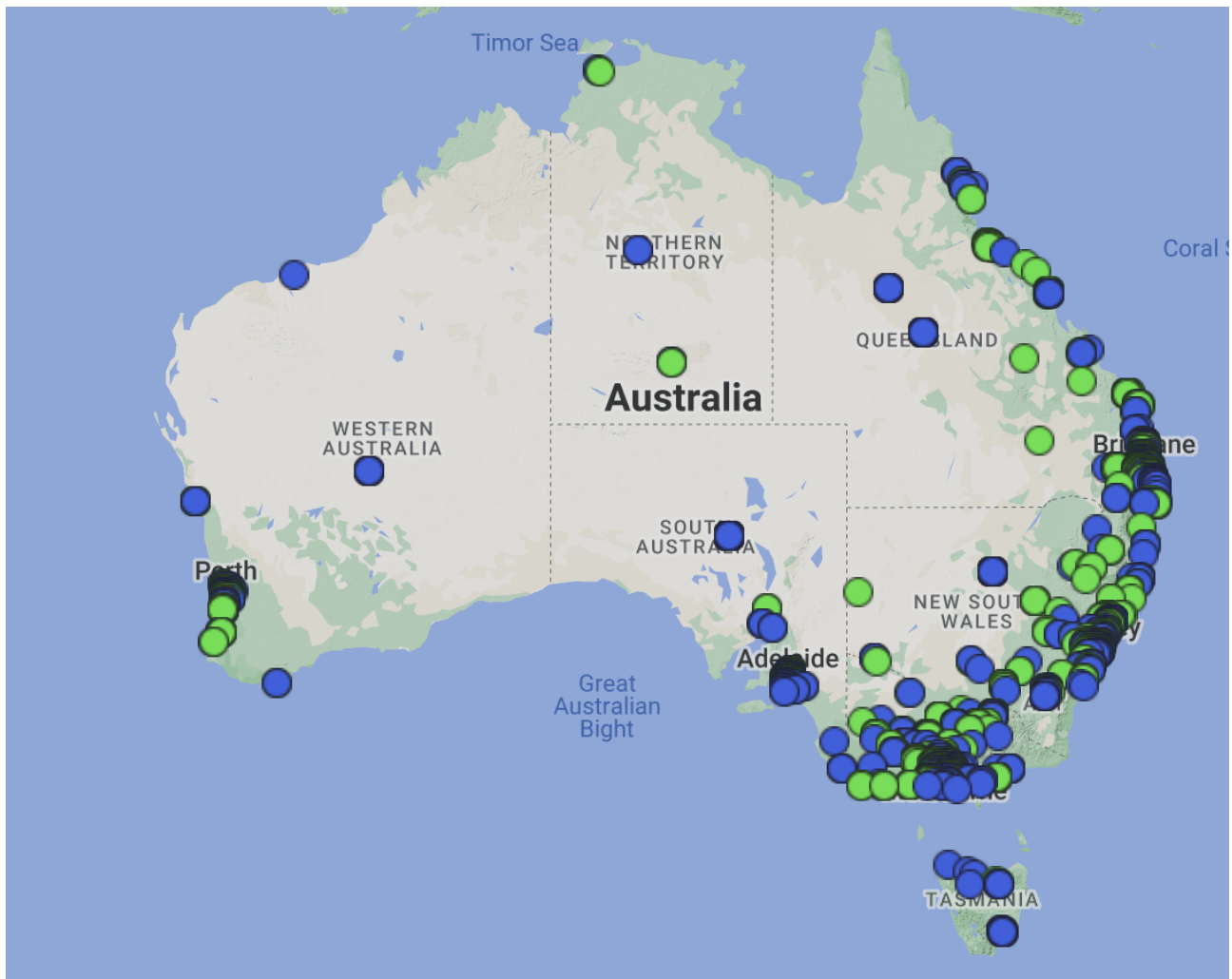
Property features

Another option available when creating a profile with the Housing Hub is for seekers to select which features they would like to have in their home. As illustrated in Figure 21, the top 15 features that seekers were looking for were:

1. Cooling
2. Heating
3. Outdoor area
4. Built-in wardrobes
5. Accessible features
6. Wheelchair accessibility
7. Broadband internet
8. Parking

9. Dishwasher
10. Pets allowed
11. Ensuite
12. Strong walls/doors/glass/soundproofing
13. Lift in building
14. Fire sprinkles
15. Automated doors

Consistent with previous seeker snapshots,[24] 'cooling' and 'heating' remain the most popular features seekers are looking for. Moreover, all of these features (with a slight variation in ranking) also appeared in the top 15 features in the previous seeker snapshots,[25] except for 'automated doors.' These top 15 features are important to consider, as this can be useful for informing future developments and help providers to ensure that these features are prominently displayed in their listings.

Figure 21. Seekers' preferred housing features (profile data, *n* = 6,464 data points)

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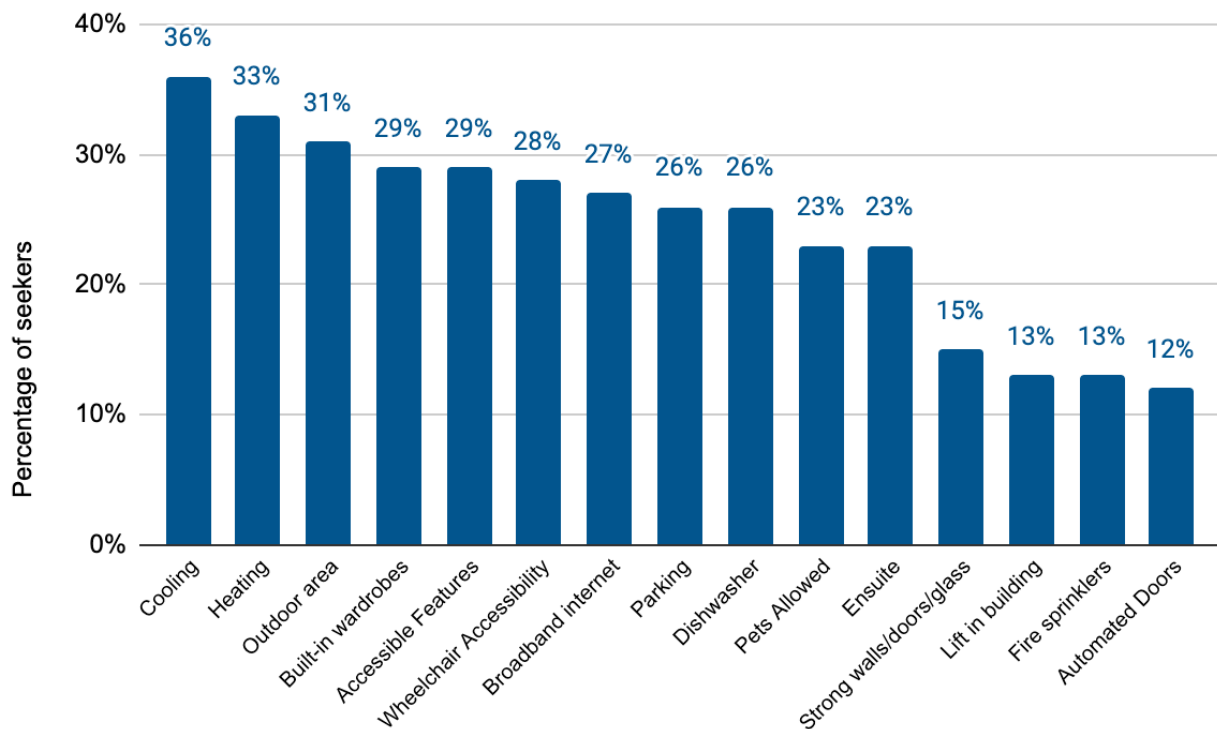
[24] Wellecke et al. (2022, June). *Housing seeker snapshot*. Housing Hub and Summer Foundation; Wellecke et al. (2021, December). *Housing Seeker Snapshot*. Housing Hub and Summer Foundation; Rathbone et al. (2021, May). *Housing Hub Housing Seekers Snapshot*. Housing Hub and Summer Foundation

[25] Ibid.

What does the data say?

The current edition of the Housing Hub seeker snapshot provides insight into the housing needs and preferences of people with disability in Australia.

The findings largely align with the 3 previous editions of the report. Many seekers are dissatisfied with their current housing situations, are looking for ongoing rental properties, and are wanting to move immediately. Although slight differences are apparent, the consistent findings across the snapshots suggest that the housing needs and preferences of people with disability are relatively stable over time. Given the consistency in findings, as well as the high and immediate demand for accessible housing options, the Housing Hub hopes that the seeker snapshots will help guide housing providers in developing suitable properties that align with the preferences of people with disability.

The key findings of the report are summarised and compared to previous snapshots below:

	May 2021	December 2021	June 2022	November 2022
Location	Most seekers were located in: (1) Victoria, (2) New South Wales, (3) Queensland, and (4) South Australia	Most seekers were located in: (1) Victoria, (2) New South Wales, (3) Queensland, and (4) South Australia	Most seekers were located in: (1) Victoria, (2) Queensland, (3) New South Wales, and (4) South Australia	Most seekers were located in: (1) Victoria, (2) Queensland, (3) New South Wales, and (4) South Australia
Preferred location	Most seekers were looking for properties in the eastern states, predominantly in capital cities.	Most seekers were looking for properties in the eastern states, predominantly in capital cities.	Most seekers were looking for properties in the eastern states, predominantly in capital cities.	Most seekers were looking for properties in the eastern states, predominantly in capital cities, with slight demand for regional suburbs.
Age	Almost all seekers were between 18 and 64 years old. The most common age range was 35-44 years.	Almost all seekers were between 18 and 64 years old, with a relatively even age distribution.	Almost all seekers were between 18 and 64 years old. The most common age range was 25-34 years.	Almost all seekers were between 25-64 years old. The most common age range was 25-34 years, and 55-64 years.
Disability type	The most common disability types were: (1) Autism, (2) Other, and (3) Acquired Brain Injury	The most common disability types were: (1) Autism, (2) Other Intellectual, and (3) Psychological / Other physical / Other	The most common disability types were: (1) Autism, (2) Psychological, and (3) Other Intellectual	The most common disability types were: (1) Autism, (2) Psychological, and (3) Other Physical

	May 2021	**December 2021**	**June 2022**	**November 2022**
Current living situation	Most seekers were living in privately rented homes, followed by privately owned properties.	Most seekers were living in privately rented homes, followed by privately owned properties.	Most seekers were living in privately owned properties, followed by privately rented homes.	Most seekers were living in privately rented homes, followed by privately owned homes.
Satisfaction with current living situation	63% of seekers were dissatisfied with their current housing situation.	60% of seekers were dissatisfied with their current housing situation.	68% of seekers were dissatisfied with their current housing situation.	67% of seekers were dissatisfied with their current housing situation.
Preferences to rent/buy	More than 85% of seekers were looking for a rental property, with 69% seeking an ongoing lease.	More than 85% of seekers were looking for a rental property, with 71% seeking an ongoing lease.	More than 87% of seekers were looking for a rental property, with 73% seeking an ongoing lease.	More than 85% of seekers were looking for a rental property, with 74% seeking an ongoing lease.
Living with or without others	Almost half of all seekers wished to live alone.	Almost half of all seekers wished to live alone.	Almost half of all seekers wished to live alone.	More than two-fifths of all seekers wished to live alone.
When to move	67% of seekers wished to move immediately.	67% of seekers wished to move immediately.	64% of seekers wished to move immediately.	57% of seekers wished to move immediately.
Support needs	41% of seekers have support needs for 24 hours a day.	38% of seekers have support needs for 24 hours a day.	39% of seekers have support needs for 24 hours a day.	36% of seekers have support needs for 24 hours a day.
SDA and design category	Slightly more than half of the seekers were seeking an SDA property. The most commonly selected SDA design categories were High Physical Support, followed by Improved Liveability.	Slightly more than half of the seekers were seeking an SDA property. The most commonly selected SDA design categories were High Physical Support, followed by Improved Liveability.	Approximately half of the seekers were seeking an SDA property. The most commonly selected SDA design categories were High Physical Support, followed by Improved Liveability and Fully Accessible.	Majority of the seekers were seeking an SDA property. The most commonly selected SDA design categories were High Physical Support, Improved Liveability and Fully Accessible.
Top 5 Features	(1) Cooling (2) Heating (3) Private bathroom (4) Outdoor area (5) Built-in wardrobes	(1) Cooling (2) Heating (3) Outdoor area (4) Built-in wardrobes (5) Wheelchair accessibility	(1) Cooling (2) Heating (3) Accessible features (4) Outdoor area (5) Built-in wardrobes	(1) Cooling (2) Heating (3) Outdoor area (4) Built-in wardrobes (5) Accessible features

Housing Hub services for housing providers

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

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

It is free to use the Housing Hub to create property listings and receive enquiries from prospective tenants.

Premium services

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

Understanding the SDA Market

Generalised data resulting from housing seeker searches on the Housing Hub can be used to understand demand for accessible housing in locations across Australia. With insights into what types of housing (and housing features) are desired in certain locations, providers can build to address demand with greater certainty. The Housing Hub offers 2 types of market data reports to support greater understanding of housing needs in locations.

Market data subscription

A data report in an easy-to-read dashboard and an Excel format spreadsheet that can be emailed to subscribers on a quarterly basis in early April, July, October and January each year. Each report includes the 3 preceding months of data for both demand and supply. Demand data is shown by SA3 and SA4 locations across the whole of Australia, and shows the number of searches for each location along with the number of searches for property types and design categories. Supply data is from this SDA Supply in Australia report. Click here for more information.

Market data report for a Local Government Area

A bespoke report for a Local Government Area can be developed to show the demand and supply for housing in that area from data within the Housing Hub and this SDA Supply Report report. Data is shown for a 3-month period in detail for the selected Local Government Area. Click here for more information.

Attracting tenants

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

Featured property listing

Housing providers and vendors can promote a listing as a 'Featured Property'. Featured properties appear on the homepage of the Housing Hub website, and are promoted via the Housing Hub's social media channels and via email to our subscriber list of more than 8,000 housing seekers. Click here for more information.

Advertising

Providers can also advertise their organisation and link to their provider page on the Housing Hub through paid advertisements that appear as banner ads on housing seekers' search results page. Click here for more information.

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

Housing Hub listing service

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

Listing performance dashboard

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

Individual matching service

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

Building SDA properties for identified tenants

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

Supporting prospective tenants to secure SDA and support funding

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

Understanding the needs of your customers

The Housing Hub's Lived Experience Facilitators are people with disability who currently live in SDA or other accessible housing, or are currently working towards a housing outcome that is right for them.

Our team of Lived Experience Facilitators run regular information and capacity building events for people with disability, families and supporters. For a fee, the team can also provide expert support to housing providers and vendors who wish to learn more about the cohort of people they are developing for, co-design or get input into their future builds, get insights into the preferences of prospective tenants, or build the capacity of their workforce. Click here for more information.

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

The Summer Foundation's role in the SDA Market

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

Summer Foundation

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

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

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

The Housing Hub's Tenancy Matching Service currently works with 6 SDA providers to identify potential tenants for new SDA projects in the pipeline. Those providers are Summer Housing, Enliven Housing, Insitu Housing, Guardian Living, Project Friday and Specialist Disability Accommodation Pty Ltd. So far, the Tenancy Matching Service has supported more than 700 NDIS participants to receive a housing offer in New Build SDA, including 90 younger people who were living in residential aged care. The Tenancy Matching Service is a social enterprise that operates on a cost recovery basis as part of the Summer Foundation's Housing Hub initiative.

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

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

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