

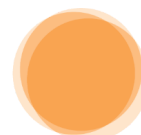


Specialist Disability Accommodation Supply in Australia

November 2023

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Specialist Disability Accommodation – Supply in Australia

Sixth *SDA Supply in Australia* report – November 2023

First *SDA Supply in Australia* report – March 2019

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DISCLAIMERS

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Acronyms

CHP	Community Housing Provider
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
OOA	On-site Overnight Assistance
RAC	Residential Aged Care
SA4	Statistical Area 4
SDA	Specialist Disability Accommodation
SIL	Supported Independent Living

Executive Summary

Funding to live in specialist disability accommodation (SDA) can be transformative for eligible participants of the National Disability Insurance Scheme (NDIS). Recent demand projections estimate that by 2042 over 36,000 people with extreme functional impairment and/or very high support needs will require SDA housing. Despite the current and projected size of the SDA market, publicly available data is incomplete. The National Disability Insurance Agency (NDIA) releases data periodically on enrolled SDA, but details on SDA under development are limited. Given the time it takes to plan, finance, and build new SDA, investors and developers require clarity on the supply pipeline to better shape their development plans.

While there are 23,092 participants with SDA funding in their plans as of June 2023, data from the NDIA shows that only 13,552 of these participants had payments made for SDA from their plans. Moreover, many NDIS participants remain stuck in hospitals and more than 2,000 people under 65 are living in residential aged care (RAC), many of whom will meet the eligibility criteria for SDA funding. Understanding the demand profile for SDA underpins decisions by investors and providers about where and what types of SDA to build. In addition, an understanding of the current and forecast supply of SDA is crucial. While the NDIA has taken positive steps in their stewardship of the SDA market with the release of the *SDA Pricing Review and Demand Projections Report*, it is clear that more work still needs to be done to understand SDA demand to ensure all eligible people can live in SDA that meets their needs.

This report presents an overview of the future SDA supply in Australia. Building on previous *Specialist Disability Accommodation – Supply in Australia* reports,¹ the Housing Hub conducted a nationwide survey among SDA providers in September 2023. The aim was to gather information on SDA currently being developed, offering clarity for the broader SDA community and the NDIA. These in-progress developments range from initial land acquisition to fully constructed dwellings awaiting NDIA enrolment.

The report integrates the survey findings with NDIA data on enrolled SDA to offer vital supply data to the market. The survey enhances the NDIA's data by providing more granular information on the SDA construction pipeline. The results offer practical knowledge about current and forecast SDA in Australia, as well as revealing strategies and perspectives of SDA providers and their plans for further SDA development.

¹ Previous iterations of the survey are available here:

<https://www.housinghub.org.au/resources/article/report-sda-supply-in-australia?cs=reports-and-publications>

Key findings

When comparing the findings of the 2021, 2022, and 2023 SDA supply survey, some notable similarities and differences emerged.

Year on year, High Physical Support single-resident apartments are highly prevalent in the SDA pipeline. In this year alone, they accounted for 44.5% of SDA dwellings and 30.0% of SDA places in development. This finding does not align with the *Specialist Disability Accommodation Market Information Statement*², released by the NDIA in August 2021. This statement, cautioned SDA providers and investors about a possible supply imbalance between High Physical Support single-resident apartments in a number of locations compared with all other building types, leading to high vacancies in the market. SDA providers and investors were advised that the continued increases in High Physical Support single-resident apartments did not reflect the “likely approved demand profile anticipated by the NDIA”.³ Despite this caution to slow the rate of development of these types of dwellings, their presence in the market has remained strong, having a higher proportion than both 2021 (40.0% of dwellings, 28.1% of places) and 2022 (34.9% of dwellings, 23.0% of places). However, group homes have reduced in development numbers this year compared to the previous 2 years (172 places in 2021, 187 places in 2022, 129 places in 2023). This trend is expected to continue, particularly given NDIA recommendations,⁴ and the views of the Disability Royal Commission⁵ regarding the need to phase out group homes in Australia. The dispersion of developments across jurisdictions has contrasted with previous years, with Western Australia showing the highest numbers for dwellings and places this year, overtaking Queensland, Victoria, and New South Wales. While Western Australia’s development activity has doubled in the number of dwellings in development since last year (231 dwellings to 477 dwellings), Victoria has shown a marked decrease in pipeline dwellings (497 in 2022 to 313 in 2023). Victorian developments, while fewer, are in line with the NDIA’s demand projections across

² NDIA (2021). *Specialist Disability Accommodation Market Information Statement*. National Disability Insurance Agency. Downloaded 10 October 2023. <https://www.ndis.gov.au/media/3489/download?attachment>

³ Ibid. Pg. 2.

⁴ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 Final Report*. National Disability Insurance Agency. Downloaded 10 October 2023. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

⁵ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*, Recommendation 7.43/44. Downloaded 31 October 2023. <https://disability.royalcommission.gov.au/system/files/2023-09/Final%20Report%20-%20Volume%207%2C%20Inclusive%20education%2C%20employment%20and%20housing%20-%20Summary%20and%20recommendations.pdf>

many Statistical Area 4 (SA4) regions,⁶ as is the case in New South Wales.⁷ Provider confidence in the SDA market has continued to build since 2021 and 2022, likely reflective of policy changes and updated market data. This year, 56.8% of providers reported some amount of confidence in the market, compared to 45.2% and 46.5% from the previous years' surveys (2021 and 2022, respectively). The separation of housing and support services, the model which is encouraged by the NDIA, has continued to improve each year, from 37.1% of providers indicating their tenants have full choice over their support providers in 2021, to 45.5% in 2022, and to 67.6% in 2023. This increased freedom of choice over housing and support services is well aligned with the recommendations of the NDIS Quality and Safeguards Commission.⁸

A total of 60 providers contributed to the current survey, including 55 who provided information about their SDA supply pipeline. The key findings from this year's survey are provided below. For comparisons to the findings from last year's survey, please refer to the footnotes.

- A total of **2,287 places** were being developed, across **1,543 SDA dwellings**⁹
- **More than half (60.7%)** of the reported SDA places were being developed by **private housing providers**¹⁰
- SDA properties were being developed in all states and territories in Australia. The state with the greatest amount of SDA places in development was **Western Australia (28.0%)**.¹¹ More than half of the SDA places were also being developed across **Victoria (20.4%)**, **New South Wales (23.0%)**, and **Queensland (16.2%)**¹²
- By build type, most places were being developed in **apartments (37.7%)**, and **houses (33.1%)**, followed by **villas/duplexes/townhouses (23.6%)**¹³

⁶ The NDIA reports geographical data relating to SDA according to the Australian Statistical Geography Standard (ASGS) release 1, 2016:
<https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/1270.0.55.001Main+Features10018July%202016?OpenDocument>

⁷ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23: Demand projections*. National Disability Insurance Agency. Downloaded 31 October 2023.
<https://www.ndis.gov.au/media/6289/download?attachment>

⁸ National Disability Insurance Scheme Quality and Safeguards Commission. (2021). *NDIS practice standards and quality indicators (Version 4)*. Downloaded 31 October 2023.
<https://www.ndiscommission.gov.au/providers/ndis-practice-standards>

⁹ Development activity is broadly on par with 2022, with 17 fewer places and 21 additional dwellings reported this year compared to last year.

¹⁰ An increase of +2.4% points from 2022.

¹¹ An increase of +10.4% points from 2022.

¹² Compared to last year, total development activity across these states has decreased by -12.3% points in 2023. In Victoria, development activity has decreased by -9.7% points in 2023, while in New South Wales and Queensland it has decreased by -0.4% and -2.2% points, respectively.

¹³ Building types are less evenly distributed than in 2022, as apartments increased by +7.2% points; houses increased by +2.5% points; villas/duplexes/townhouses decreased by -7.2% points; and group homes decreased by -2.5% points.

- Less than **one-tenth (5.6%)** of pipeline places were in **group homes**¹⁴
- More than **two-thirds (68.4%)** of the pipeline dwellings were being developed to accommodate a **maximum number of 1 SDA resident**¹⁵
- Most places were being developed for **High Physical Support (71.5%)** design, followed by **Robust (11.6%)**, **Improved Liveability (9.1%)** and **Fully Accessible (4.8%)**¹⁶
- **More than half (56.8%)** of providers reported being ‘very’ or ‘slightly’ confident in the SDA market¹⁷
- Reasons provided for this confidence were **strong demand for high-quality SDA, optimism because of NDIA policy changes and updated market data**, as well as **strengthening stakeholder relationships**
- Nearly **one-fifth (18.9%)** of providers reported feeling ‘very’ or ‘slightly’ unconfident¹⁸ because of **difficulties with NDIS processes and approvals**
- **More than two-thirds (67.6%)**¹⁹ of providers gave their tenants full choice over their support provider, with only 13.5% providers limiting their tenants to receive housing and support services from the same organisation

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

¹⁴ A decrease from 2022 of -2.5% points.

¹⁵ This matches results from 2022.

¹⁶ Proportions differed from 2022: in 2023 High Physical Support increased by +7.3% points; Robust decreased by -1.2% points; Improved Liveability decreased by -3.1% points; and Fully Accessible decreased by -5.7% points.

¹⁷ This is an increase of +10.3% points since 2022.

¹⁸ A decrease from 2022 of 15.0%.

¹⁹ An increase from 2022 of 22.1%.

Table 1 – Estimated number of SDA dwellings and places in development as at September 2023

State	Dwellings	Places
NSW	343	526
VIC	313	467
QLD	216	371
WA	477	641
SA	144	213
TAS	10	15
ACT	27	34
NT	13	20
TOTAL	1,543	2,287

Introduction

Under the National Disability Insurance Scheme (NDIS), people with disability who have an ‘extreme functional impairment and/or very high support needs’ may be eligible for funding for specialist disability accommodation (SDA). SDA is housing (i.e., the bricks and mortar) that is specifically designed to help people with disability to maximise their independence and allows for more efficient delivery of support. The SDA model of funding creates a user-driven market where eligible NDIS participants can use their SDA funding to choose a dwelling from a registered provider to suit their needs and preferences.²⁰ Thus, SDA funding is designed to give NDIS participants choice and control of where they live, how they live, and with whom they live.

Until recently, it was estimated 28,000 people would require SDA (approximately 6% of all NDIS participants) when the market reached full coverage.²¹ However, forming part of their responsibility to steward the SDA market, the National Disability Insurance Agency (NDIA) recently released a 20-year projection model which estimates that:

- 27,022 people will require SDA by 2027
- 29,742 people will require SDA by 2032
- 32,976 people will require SDA by 2037
- 36,684 people will require SDA by 2042²²

This model also estimates the projected SDA demand by design category and geography (i.e., state and SA4 region). Specifically, for design category, the projections indicate a proportional decrease in the demand for Improved Liveability, while the other 3 design categories (Fully Accessible, Robust, and High Physical Support) are expected to see an increase in demand over the two decades. Additionally, by 2042, the greatest demand for SDA is expected to be in New South Wales and Victoria. Seven out of the 10 SA4 regions which are projected to account for one-third of all growth in SDA demand are also in these states (New South Wales: Sydney - South West and Sydney - Parramatta [2 SA4 regions]; Victoria: Melbourne - West, Melbourne - South East, Melbourne - Inner, Melbourne - North East, and Melbourne - North West [5 SA4 regions]).

²⁰ NDIA (2022). *Specialist Disability Accommodation: Operational guidelines*. National Disability Insurance Agency.

<https://ourguidelines.ndis.gov.au/supports-you-can-access-menu/home-and-living-supports/specialist-disability-accommodation>

²¹ NDIA (2018). *SDA provider and investor brief*. National Disability Insurance Agency. National Disability Insurance Agency. Downloaded 10 October 2023. <https://www.ndis.gov.au/media/1137/download>

²² NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23: Demand projections*. National Disability Insurance Agency. Downloaded 31 October 2023. <https://www.ndis.gov.au/media/6289/download?attachment>

To understand and address unmet SDA demand, more focus on ‘demand activation’ is required. That is, the NDIA needs to: (1) identify all SDA eligible participants; (2) provide support to these participants to explore their housing options and assist them with making an informed choice (i.e., capacity building); (3) document the housing needs and preferences of these participants and (4) collate and release this demand data to the SDA market. As of June 2023, the number of NDIS participants with SDA funding in their plan rose from 19,358 (June 2022) to 23,092 (June 2023), with an annualised growth rate of 16%.²³ However, an analysis of the most recent line item payments shows that only 13,552 of these participants had payments made for SDA from their plan.²⁴ Additionally, in the most recent quarterly report, the NDIA reported that as of June 2023, \$365m has been allocated to SDA in participant plans but only \$230m has been paid to SDA providers on behalf of participants.²⁵ This indicates that only 63% of SDA participant funding was utilised in 2022-23. The reasons for such a gap between the amount that has been allocated and the amount that has been spent are multifaceted. Some people with disability may live in SDA that is either inadequate or they have an SDA decision for a dwelling type that is not available in the market in the region they want to live (e.g., 3 bedroom house). Other people with disability may be living in shared housing due to limited funding for support while others may be waiting for new SDA to be built before they can move in. In addition to these possible reasons, there are over 2,000 people under the age of 65 who are living in residential aged care (RAC)²⁶ and many NDIS participants remain stuck in hospitals. Thus, even though the NDIA has taken positive steps in their stewardship of the SDA market with the release of the *Demand Projections Report*, it is clear that further research is needed to understand the reasons for the gap between allocation of SDA and spend. Additionally, a greater focus on demand activation by the NDIA is also required.

It is understood that demand for SDA will inevitably increase over time and it is vital that SDA supply can keep pace with this SDA demand. To facilitate this, the NDIA has recently released the *SDA Pricing Review*, which aimed to evaluate the impact of current SDA prices on the supply and demand of SDA housing and set new SDA prices to guide market investment for the next 5 years.²⁷ The recommended changes to SDA prices are expected to reflect the real costs and demand for SDA, remunerating the construction of new dwellings in line with demand, and facilitating

²³ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency, p. 48. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>. Please note, this was the latest NDIA data available at the time this report was prepared.

²⁴ NDIA (2023). *Average support line item payments: June 2023*. National Disability Insurance Agency. Downloaded 31 October 2023. <https://data.ndis.gov.au/media/3740/download?attachment>. Please note, this was the latest NDIA data available at the time this report was prepared.

²⁵ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency, p. 48. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

²⁶ AIHW GEN Aged Care Data (2023). *Younger people in residential aged care*. Retrieved Nov 13, 2023, from <https://www.gen-agedcaredata.gov.au/Resources/Younger-people-in-residential-aged-care>

²⁷ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency. Downloaded 31 October 2023. <https://www.ndis.gov.au/media/6060>

more participants to access the SDA housing they need. The annual base prices for many SDA building types and design categories have increased, particularly for Improved Liveability dwellings, and 2 resident houses. However, prices for High Physical Support dwellings have stayed the same or decreased, particularly for apartments, which were believed to be overpriced in the initial pricing arrangements. These pricing adjustments are anticipated to change the supply of SDA, remunerating SDA providers differently for the various design categories and building types as prices become more reflective of actual current costs.

As of June 2023, there were 7,925 enrolled SDA dwellings across Australia; a 12% increase in the number of dwellings enrolled in the previous year.²⁸ These dwellings can accommodate 20,992 SDA places (inclusive of the 538 in-kind places in Tasmania), which is less than the number of NDIS participants with SDA funding in their plan (i.e., 23,092).²⁹ However, of the 7,925 enrolled SDA dwellings, less than half (48.2%, 3,818 dwellings) are categorised as New Build stock (i.e. dwellings that were issued their first certificate of occupancy on or after 1 April 2016), which amounts to approximately 6,940 New Build places for participants.³⁰ The remaining dwellings are Existing (i.e. dwellings without a certificate of occupancy for a New Build that are enrolled to accommodate 5 or fewer long-term residents, 49.4%), and Legacy stock (i.e. dwellings without a certificate of occupancy for a New Build that are enrolled to accommodate more than 5 long-term residents, 2.5%).³¹ Such dwellings do not meet contemporary standards for disability housing and therefore, are often an inappropriate housing option for people with disability.

Additionally, as of June 2023, there were 3,544 New Build dwellings that are unfinished (unenrolled).³² Reporting of this pipeline data became mandatory on 1 July 2021, requiring SDA providers or future SDA providers to inform the NDIA at the design stage of any proposed SDA dwellings.³³ However, while quarterly reporting of this pipeline data is useful, it is somewhat *restricted* by the stage of development at which providers must report (i.e., the design stage). Given the time it takes to plan,

²⁸ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Fig. P.1. Downloaded 17 August 2023.

<https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

²⁹ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency, p. 48. Downloaded 17 August 2023. <https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

³⁰ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Fig. P.4. & P.13. Downloaded 17 August 2023.

<https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

³¹ NDIA (2023). *SDA Pricing Arrangements and Price Limits 2023-24*. National Disability Insurance Agency.

<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments>

³² NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Table P.20.. Downloaded 17 August 2023.

<https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

³³ NDIS (2021) *NDIS specialist disability accommodation 2021-22 quarter 1 report*. National Disability Insurance Agency. Downloaded 15 September 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

finance, and build new SDA, both investors and developers require a more detailed and granular understanding of upcoming supply to inform their investments choices.

Aim

In September 2023, the Housing Hub conducted a nationwide survey of SDA providers with the aim of gaining an understanding of the projected SDA supply in Australia. Building upon previous iterations of the *Specialist Disability Accommodation - Supply in Australia* reports,³⁴ this survey gathered information pertaining to SDA properties in the development pipeline. Consequently, the survey yields valuable insights into SDA development, ranging from properties for which land has been secured, to properties where construction is completed and are pending enrolment with the NDIA. Hence, this survey differs from the pre-enrolment (or unenrolled) data released by the NDIA because it explores upcoming SDA supply from the earliest phase in the SDA development lifecycle, allowing greater insight into what SDA is being developed in nationwide locations. The pipeline data of the current survey is also presented alongside the enrolled data released by the NDIA, providing a comprehensive overview of the SDA supply landscape in Australia. The survey offers valuable insights into the market approaches of SDA providers and sheds light on their perspectives regarding the SDA market. It also details providers' intentions to expand their portfolio of SDA dwellings beyond their current pipeline.

Method

The SDA supply survey was promoted through various channels, including the Housing Hub's social media platforms, digital newsletters, and emails to SDA providers. The email distribution list used in the previous supply survey was updated and used again in the current survey.³⁵ The survey was distributed to SDA providers in September 2023 and data collection closed after 2 weeks. Survey participants consisted of several organisations which, for example, were SDA providers and developers. Throughout this report, the term 'providers' will refer to this participant group.

The survey encompassed 2 main components:

1. An online survey (through QuestionPro), designed to assess providers' market approaches and levels of confidence, and

³⁴ Previous iterations of the survey are available here:

<https://www.housinghub.org.au/resources/article/report-sda-supply-in-australia?cs=reports-and-publications>

³⁵ The email distribution list was updated using the NDIA's list of registered SDA providers and Housing Hub housing providers

2. A Google Sheet designed to compile information about providers' pipeline of SDA dwellings

The questions in the online survey were similar to those asked in the previous survey. However, given the NDIA released the *SDA Pricing Review* in June 2023 to incentivise the construction of new dwellings in line with demand, it was deemed appropriate to include questions about the impact of this review on providers' enrolled and pipeline dwellings.

In previous years, pipeline data was collected by asking SDA providers to fill in an Excel spreadsheet. However, guided by provider feedback, the Excel spreadsheet was replaced with a Google Sheet. Similar to last year, providers who had participated in the previous iteration of the supply survey were sent a personalised pipeline template, showing their pipeline information reported last year. However, given that the development status of their previously reported dwellings was likely to have changed, this section was blank. This allowed providers to indicate whether their previously reported dwellings had progressed in their development (e.g., from land secured, waiting for building approval and/or finance approval to under construction).³⁶ Providers were also asked to update any previously reported information which may have changed (e.g., design category or build type), along with adding any dwellings that were new to their pipeline. Providers who did not participate in the previous survey received a blank Google Sheet to report their pipeline dwellings.

The estimated time required to complete the survey varied based on the size of a provider's pipeline, with an approximate duration of 30 minutes. All providers were assured that their responses would be treated with strict commercial confidentiality, and any personally identifiable information would be anonymised in the published report.

Limitations

The data presented in this report comes with certain limitations that should be considered when interpreting its findings. Firstly, it is important to note that this survey was voluntary, and not all SDA providers currently engaged in SDA development participated in it. Consequently, the survey does not encompass all the SDA dwellings under development in Australia.

Estimating the extent to which SDA providers are represented in the survey is challenging. According to data from the NDIA, there were 355 active SDA providers in

³⁶ Changes in development status are needed to calculate the conversion rate of dwellings (i.e., those dwellings which convert from pipeline to enrolled with the NDIA. This information will be available in the SDA supply premium addendum; a paid report produced by the Housing Hub which will be available for purchase in early 2024.

the last quarter of 2022/23.³⁷ The survey collected pipeline data from 55 providers, representing approximately 15.5% of the total active providers. However, it is important to understand that ‘active providers’ includes providers with already enrolled dwellings. It is plausible that some of these ‘active providers’ are not currently developing SDA or planning on developing additional SDA in the future. This is evidenced by the findings of last year’s SDA supply survey where 10.4% of providers indicated that they were not developing further SDA dwellings beyond their current pipeline.³⁸ Hence, the count of active providers does not necessarily indicate the number of providers currently engaged in new SDA development. To ensure a high participation rate, various methods were employed, including approaching all SDA providers with an account on the Housing Hub and contacting previous survey participants with personalised pipeline spreadsheets. The survey was also advertised through multiple channels, including an industry peak body (PowerHousing Australia). These efforts aimed to yield data that represents a substantial portion of the SDA market. Despite this, the number of participants involved in the survey decreased from last year (from 79 participants in 2022 to 60 in the current survey).³⁹

Alongside not capturing all SDA developments in Australia, it's important to recognise that the pipeline dwellings included in this survey may not all reach enrolment stage. The reported pipeline figures are accepted at face value, without requiring evidence of a contractual commitment from SDA providers. Indeed, past surveys have shown instances of SDA projects in pipelines that did not come to fruition.

Additionally, some of the pipeline dwellings may undergo changes in their building and design plans, or they may not be exclusively intended for a specific design category (e.g., some providers may offer Fully Accessible funded tenants a High Physical Support dwelling). Therefore, while the data presented in this report provides an indication of future SDA supply, it is crucial to acknowledge that changes to pipeline dwellings can occur for various reasons throughout the development process.

³⁷ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Supplement P, Tab P.3. Downloaded 17 August 2023.

<https://data.ndis.gov.au/reports-and-analyses/quarterly-report-supplements>

³⁸ 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.

<https://www.housinghub.org.au/resources/article/report-sda-supply-in-australia>

³⁹ It is believed that this decrease in participation rate is due to the data collection timeframe. Specifically, in 2022, data collection was open for 4 weeks. For the current survey, data collection was open for 2 weeks.

Results: Providers who participated

Number of providers who participated

As mentioned above in the 'Methods' section, the survey consisted of two parts (i.e., the QuestionPro online survey and the Google Sheet compiling pipeline information). In this year's survey, 38 providers completed both components of the survey. However, some providers completed only one but not the other component. Specifically, there were 9 providers who completed the pipeline information but not the QuestionPro survey. In addition, there were 7 providers who completed the QuestionPro survey but not the pipeline information.

However, it is important to note that the pipeline data from the previous survey was also included in the current report, if it wasn't reported this time, and had an estimated date of occupancy after October 2023 (refer to Appendix A for a detailed description of the pipeline data screening process). This resulted in adding the pipeline details of 8 providers, who completed their pipeline information in the 2022 survey but not the current survey.⁴⁰

Therefore, the data in this report is based on a total 60 providers, with:

- 45 providers providing QuestionPro survey data⁴¹
- 55 providers providing pipeline data (i.e. 47 providers from the current survey, plus 8 providers from the previous survey who did not complete the current survey)

Refer to Appendix B for a list of all providers who agreed to be named in this report. This list also includes providers from the 2022 survey whose pipeline data was added.

⁴⁰ Please note that 2 of these 8 providers did complete the QuestionPro survey this year, so they are included in the above count of 7 providers who completed the QuestionPro survey but not pipeline information.

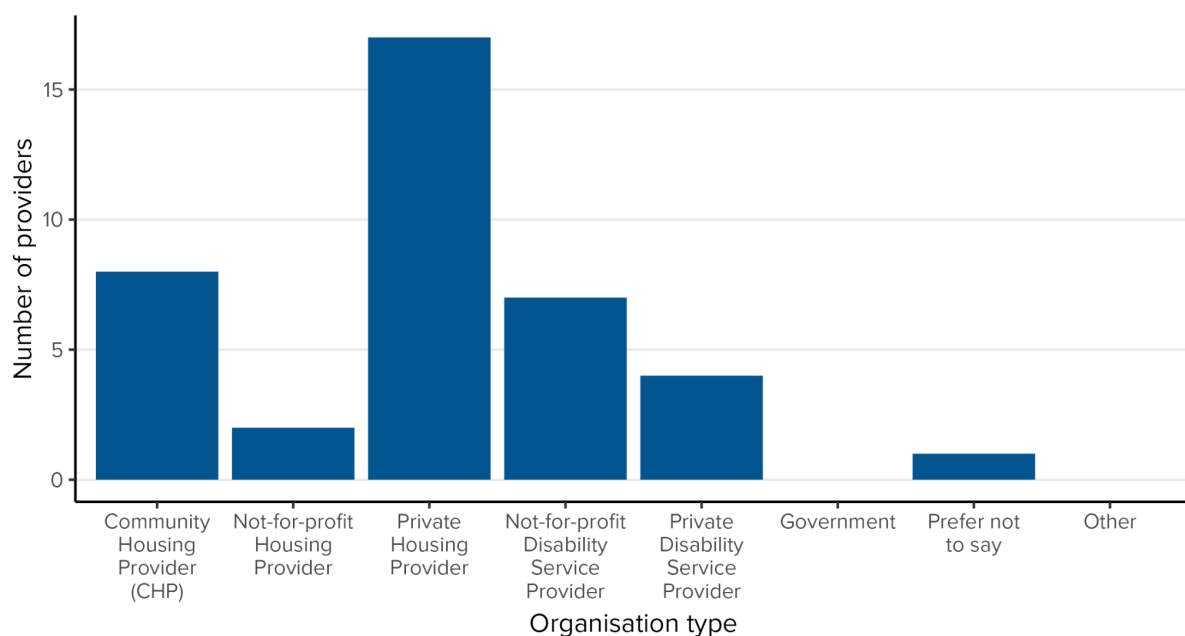
⁴¹ Some providers did not respond to all QuestionPro survey questions, therefore, the number of survey responses may differ for different sections. This will be highlighted throughout the results section.

Results: Provider approaches and confidence

Provider demographics

SDA in Australia is provided by a number of different organisation types. Of the 39 providers who completed this section of the QuestionPro survey, a large portion (43.6%) were private housing providers. The next most prevalent types were community housing providers (CHP, 20.1%) and not-for-profit disability service providers (18.0%). See Figure 1 below for an overview of all organisation types.

Figure 1 – Types of organisations developing SDA in Australia ($n = 39$)



Providers were also asked when they first started building SDA dwellings. Of the 37 providers who answered this question, responses ranged from 2016 (the first year that SDA dwellings could be enrolled as SDA) to 2023. On average, providers started building SDA dwellings in March of 2019 ($M = 4.5$ years, $SD = 2.1$ years).⁴²

⁴² Five providers reported starting SDA development before April 2016. The dates they reported were changed to April 2016 (when SDA was officially introduced by the NDIA), even though these providers may have been building disability housing from earlier.

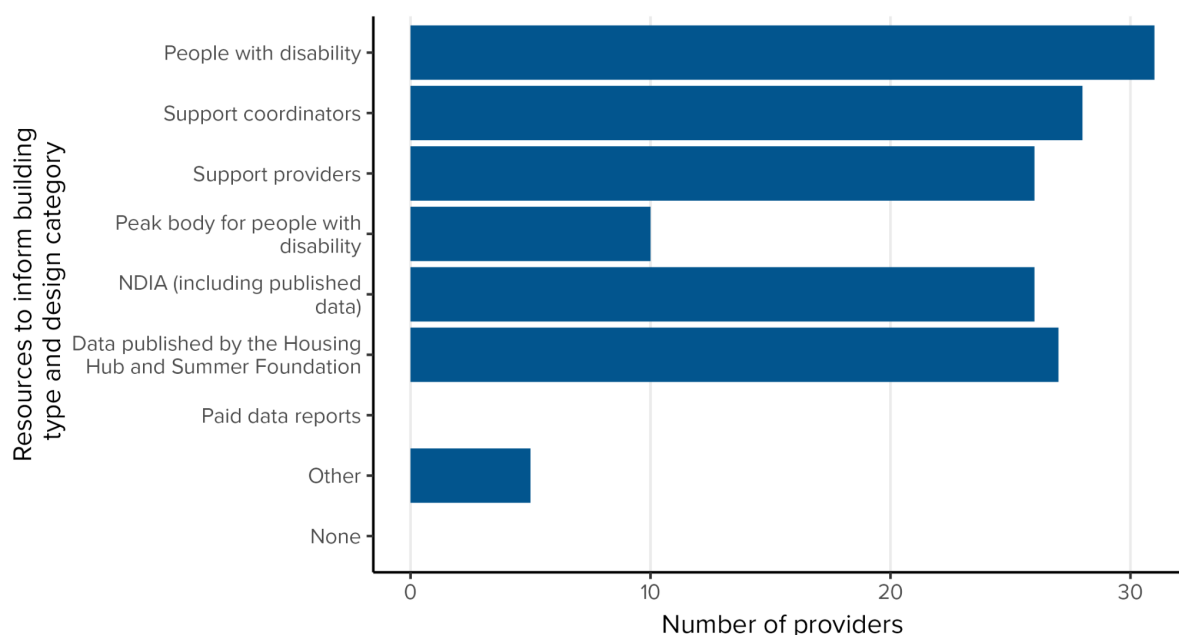
Resources that providers are using

Resources used to decide building type and design category

The resources used by providers when they are deciding what building type and design category to build were assessed as part of the survey, and the responses are shown below in Figure 2. The majority of providers (83.8%) consulted with people with disability, while over two-thirds consulted with support coordinators (75.7%), data published from the Housing Hub and Summer Foundation (73.0%), the NDIA (including published data; 70.3%), and support providers (70.3%). Peak bodies for people with disability were the least consulted resource, with only 27.0% of providers reporting their use at this stage. Paid data reports were not consulted by any providers in this survey.⁴³

Five providers (13.5%) indicated they consulted with other resources beyond what was listed in the survey. These responses consisted mainly of other professionals in the SDA market, as well as occupational therapists and family members of people with disability. On average, providers consulted with 4.1 resources ($SD = 1.5$, range = 1-6) when deciding on building type and design category. This shows providers tend to access multiple resources when making SDA decisions.

Figure 2 – Consultation of groups by SDA providers ($n = 37$) to inform building type and design category



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

⁴³ Refer to Appendix C for a description of the paid data reports produced by the Housing Hub.

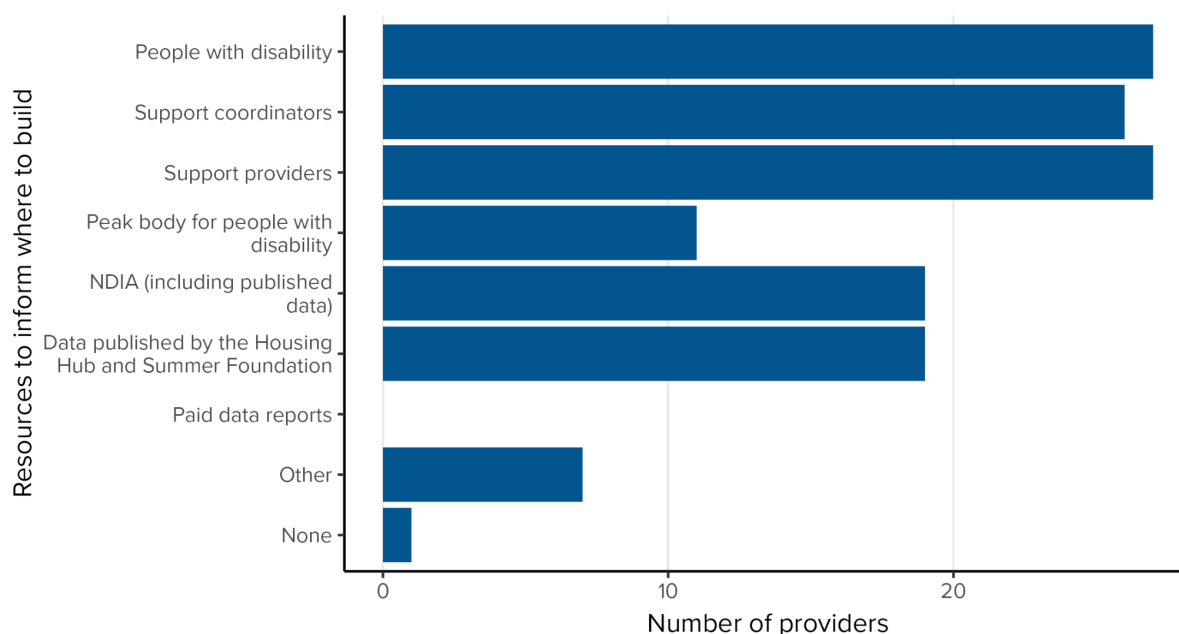
Resources used to decide location

In terms of using resources to decide where to build new SDA dwellings, once again, most providers consulted people with disability (73.0%), as shown in Figure 3 below. Support providers were also consulted by the same number of providers (73.0%), and a similar number reported consulting with support coordinators (70.3%).

Approximately half of the surveyed providers consulted with the NDIA (including published data; 51.4%) and data published by the Housing Hub and Summer Foundation (51.4%). Nearly one-third of providers consulted with peak bodies for people with disability (29.7%), and none of the surveyed providers accessed paid data reports when deciding where to build SDA properties. One provider reported accessing none of the listed resources, though did indicate they used other resources when deciding on location.

In total, 7 providers (18.9%) reported accessing other resources when deciding on locations to build SDA. These largely included locations of pre-existing developments to either be rebuilt or added on to, and information already known to the organisation. One provider consulted with the family of their prospective resident. On average, providers consulted with 3.7 resources ($SD = 1.7$, range = 1-6) when deciding upon where to build their SDA properties.

Figure 3 – Consultation of groups by SDA providers ($n = 37$) to inform the location of the build



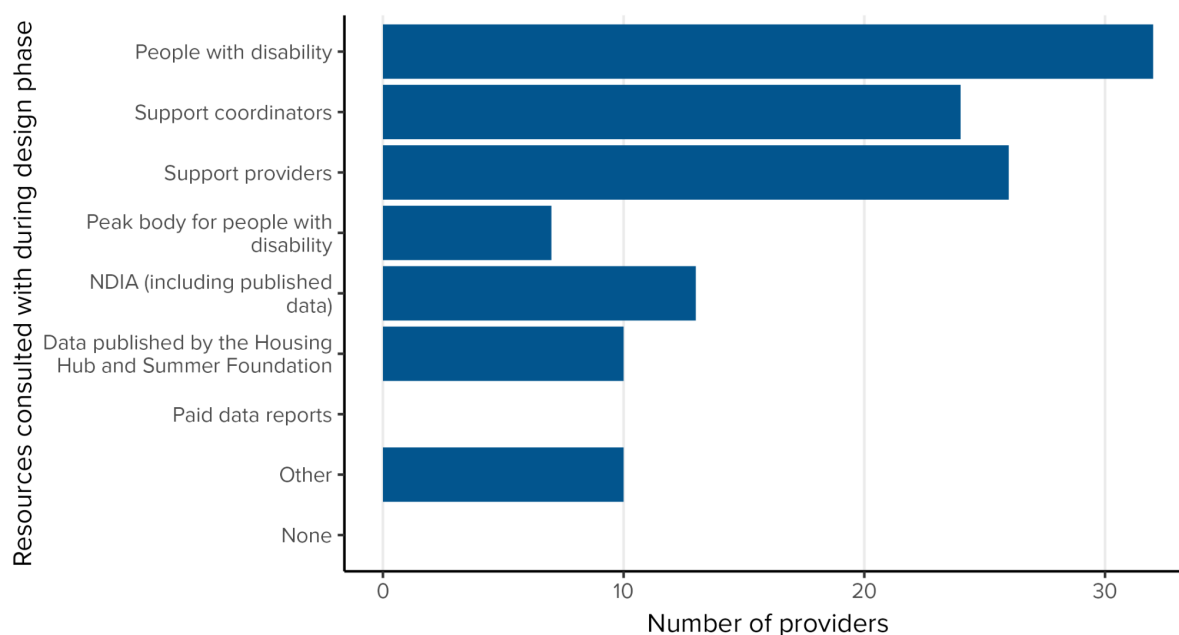
Note: Providers could select multiple responses. Examples of data published by the Housing Hub and Summer Foundation were the SDA Supply Survey, SDA Seekers Snapshot, and SDA Listings Snapshot.

Resources used during the design phase

The resources consulted with during the design phase of developing SDA dwellings are presented in Figure 4. As in the above sections, the most commonly consulted resources were people with disability (86.5%), support providers (70.3%), and support coordinators (64.9%). The NDIA (including published data; 35.1%) and data published by the Housing Hub and Summer Foundation (27.0%) were used markedly less than when making decisions about the other aspects of SDA dwellings. Peak bodies for people with disability were consulted by 18.9% of surveyed providers. Once again, paid data reports were not utilised.

Ten providers (27.0%) included additional resources which were consulted during the design phase. These included other professionals in the SDA market, allied health professionals, and families of people with disability. Across the providers surveyed, an average of 3.3 resources ($SD = 1.5$, range = 1-7) were consulted during the design phase of developing SDA dwellings.

Figure 4 – Consultation of groups by SDA providers ($n = 37$) during the design phase



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

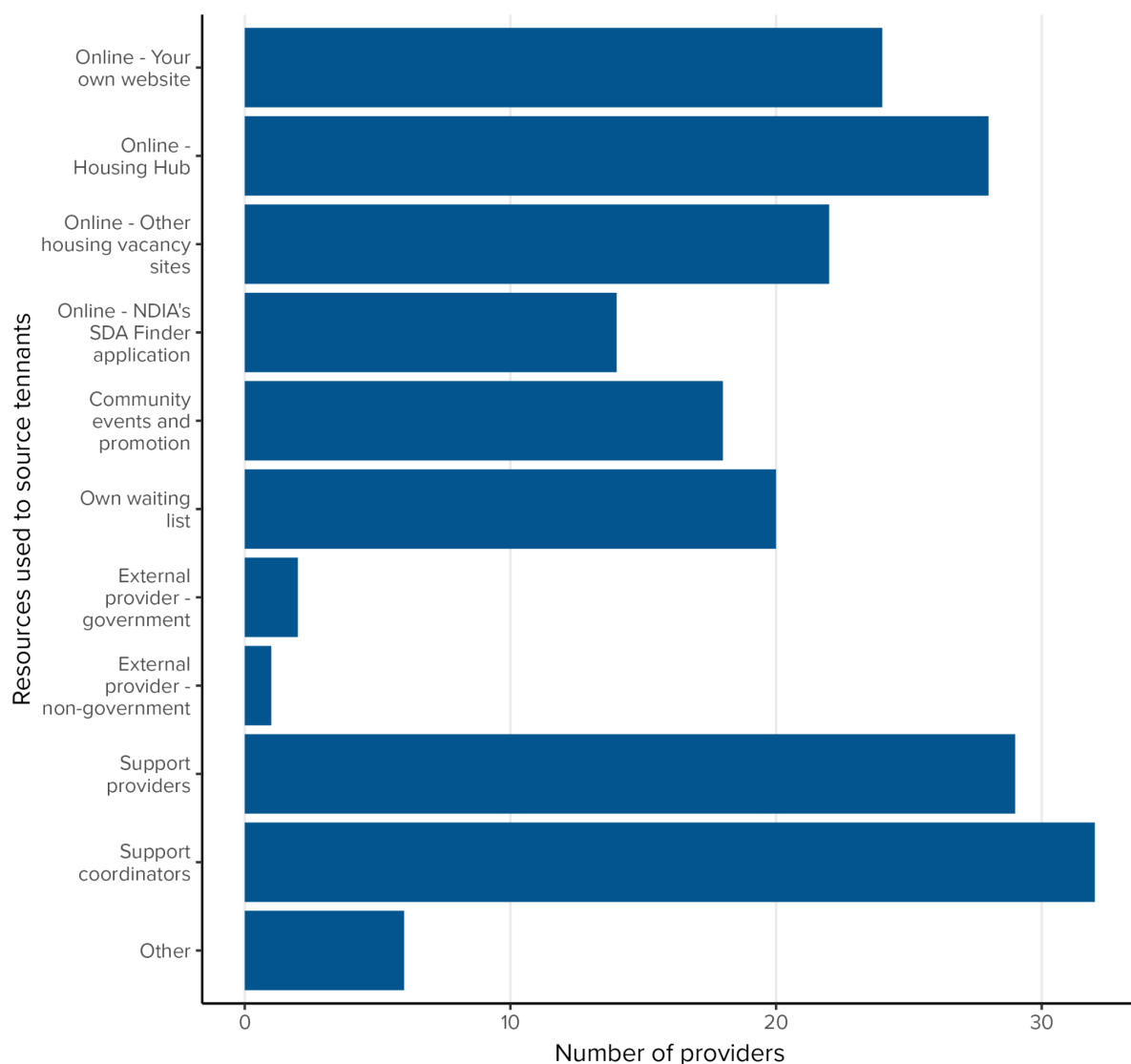
Resources used to source tenants

In addition to surveying the resources consulted with throughout the development of SDA dwellings, providers were also asked what resources they use to source tenants, as shown in Figure 5. Support coordinators (88.9%) and support providers (80.6%) were the most commonly consulted resources. Many tenants appear to be sourced online, through the Housing Hub (77.8%), providers' own websites (66.7%), other

housing vacancy sites (61.1%), and the NDIA's SDA Finder application (38.9%). In addition, providers' own waiting lists (55.6%) and community events and promotion (50.0%) were also common methods for sourcing tenants. External providers, both government (5.6%) and non-government (2.8%), were not commonly used to source tenants.

Six providers (16.7%) listed other methods used to source tenants. No common patterns emerged from these responses, but they included direct marketing, referrals from hospital staff, and enquiries. On average, 5.6 resources ($SD = 2.5$, range = 1-10) were used to source tenants for SDA properties.

Figure 5 – Resources used by SDA providers ($n = 36$) to source tenants



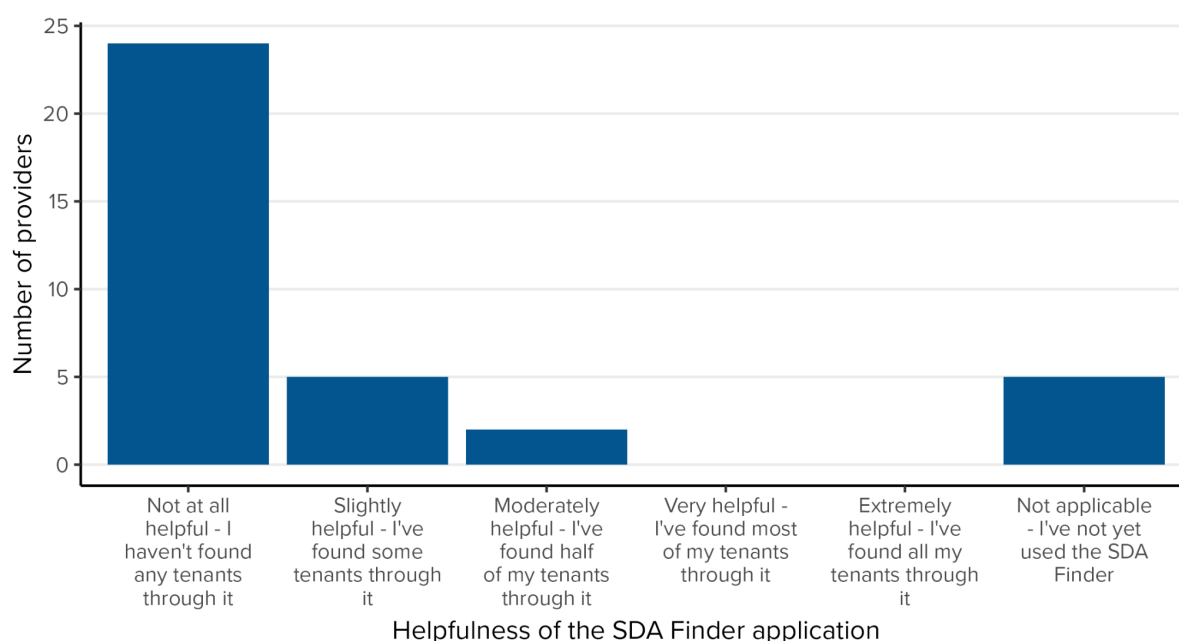
Note: Providers could select multiple responses.

Usefulness of the SDA Finder

One of the above resources, the NDIA's SDA Finder application, is an online tool developed by the NDIA for the purposes of connecting those seeking SDA with available SDA properties.⁴⁴

Providers were asked to rate how helpful the SDA Finder application has been in sourcing tenants for their properties, as shown in Figure 6. Overall, only 31 of the providers had used the tool before, and the majority of them rated the tool as 'not at all helpful' (66.7%). The remaining providers rated it as 'slightly helpful' (13.9%) and 'moderately helpful' (5.6%). None of the surveyed providers rated the tool as 'very helpful' or 'extremely helpful' or 'extremely helpful'.

Figure 6 – Helpfulness of the SDA Finder application ($n = 36$) to source tenants



Provider confidence in the SDA market

Current level of confidence in the SDA market

SDA market confidence was broadly measured in this survey, asking providers to give an overall rating of their confidence in the SDA market. While this assessment does not provide specific details on the impacts of SDA market confidence, providers were given the opportunity to explain their rating in a text comment.

⁴⁴ Available at:

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

As shown in Figure 7, confidence in the SDA market appears to have increased overall compared to last year's survey.⁴⁵ Smaller portions of providers indicated they were unconfident and a larger portion indicated they were confident. Compared to 2 years ago, there were also fewer ratings of unconfidence and more ratings of confidence generally, though a smaller proportion of providers indicated they were 'very confident'. This year, the most common response was 'slightly confident' (48.7%). The next most common responses were 'neither unconfident nor confident' (24.3%), 'slightly unconfident' (13.5%), and 'very confident' (8.1%). Finally, 5.4% of providers indicated they were 'very unconfident' in the SDA market.

Figure 7 – Providers' confidence in the SDA market in 2021 ($n = 62$), 2022 ($n = 56$), 2023 ($n = 37$)



Providers were able to give an explanation regarding their current confidence levels in the SDA market. These confidence levels were split into 3 groups: (1) responses of providers who felt slightly or very unconfident, (2) responses of providers who felt neither unconfident nor confident, and (3) responses of providers who felt slightly or very confident. All responses were summarised and grouped into overarching themes that reflected common concepts from the SDA providers' explanations.

Themes among providers who were slightly or very unconfident

One main theme was identified across the SDA providers who stated they felt either slightly or very unconfident. This theme was **difficulties with NDIS processes and approvals** ($n = 5$), which refers to the challenges stakeholders face with the NDIA's inconsistent approval processes, which can lead to long delays and mismatches

⁴⁵ These comparisons need to be interpreted with caution, because different providers participated in the surveys in 2021, 2022, and 2023

between participants' needs and levels of funding. Similar to last year's SDA supply survey, there were still issues surrounding funding approval for participants seeking single-resident dwellings, demonstrating the continuing mismatch between the housing needs of people with disability and their level of funding. Additionally, providers stated that the NDIA's SDA approval process is complex, unreliable, uncertain, and poorly administered. Although the demand for SDA dwellings is acknowledged by providers, there is a sense of hesitancy in expanding their property portfolio due to these difficulties.

“Our understanding is that while there is strong demand for SDA (at least in some categories in some areas), getting the participants, support providers and dwellings approved by NDIA as a package is difficult and uncertain in each case. Our total investment in SDA remains a small part of our overall housing portfolio and there are no plans for increased growth.” - Response from SDA provider, very unconfident.

“Poorly [administered] by the NDIS making claiming very complex. Individual participants are not receiving determinations aligned to their desires to live by themselves.” - Response from SDA provider, slightly unconfident.

In addition, 2 providers noted issues relating to **financial concerns and market dynamics** ($n = 2$). This included difficulties surrounding increased market competition, financial decline in returns, and SDA payments not matching the price changes in the property market. With the release of the *SDA Pricing Review*, some of these concerns may be addressed as the pricing changes are enacted, which according to the NDIA, will be mid-October 2023.⁴⁶ Providers' responses to the price changes are explored in a later section of this report.

“We believe SDA payments have not kept pace with increases in prices in the broader property market” - Response from SDA provider, slightly unconfident.

“SDA returns are falling, there's increased competition, and the NDIA is difficult.” - Response from SDA provider, slightly unconfident.

Themes among providers who were neither unconfident nor confident

This year's SDA supply survey shows a large group of providers ($n = 9$) that indicate that they were neither unconfident nor confident in the market. Three main themes were identified. Of these, 2 themes - **difficulties with NDIA processes and approvals** ($n = 5$) and **financial concerns and market dynamics** ($n = 2$) - echoed the concerns and difficulties identified by the providers who were unconfident in the market. For a description of these themes, please refer to the above section labelled 'Themes among providers who were slightly or very unconfident'.

⁴⁶ NDIA (2023). *SDA Pricing Review*. National Disability Insurance Agency. <https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

The third theme referred to **market uncertainties and changes** ($n = 6$). Some providers referred to NDIA policy changes, such as the recent *SDA Pricing Review*. While the outcomes of the pricing review were perceived as positive, providers noted that the changes impacted their business model and they were concerned about the implementation of the new pricing.⁴⁷ In addition to policy changes, some providers noted uncertainties about future demand, support models (such as the separation of SDA and supported independent living; SIL), and filling vacancies, leading providers to adopt a 'wait & watch' approach.

“My current advice to our Board of Management is to 'wait and watch' for determinations re separation of SIL and SDA service provision. My current advice to other investors we are working with locally [is] to 'wait and watch' given the amount of local vacancies [...].” - Response from SDA provider, neither unconfident nor confident.

“SDA Price Review outcome was good however I am concerned about the implementation of the new pricing and continued challenges associated with demand activation, slow decision making and SDA outcomes that are not aligned with the home and living goals of the participant.” - Response from SDA provider, neither unconfident nor confident.

Themes among providers who were slightly or very confident

Of the 34 providers who responded to this section of the survey, the majority of them felt either slightly or very confident in the SDA market ($n = 21$). Although the majority of providers expressed confidence, there was still an acknowledgement that there are complexities and difficulties associated with the market. Irrespective of this, providers seemed to remain confident and optimistic about the prospects of the current and future SDA market. Four key themes emerged.

The most common explanation for confidence in the market was **strong demand for high-quality SDA** ($n = 10$). This refers to the growing interest and need for SDA, which was demonstrated through increased property inquiries, high occupancy rates, and the belief that there will be an ongoing need for high-quality SDA. Providers also stated that the demand and income increase has had a positive impact on investors' willingness to invest in the market.

“The level of enquiry we are receiving, we are receiving calls constantly asking for available options” - Response from SDA provider, slightly confident.

⁴⁷ There has been a lack of communication from the NDIA following the release of the *SDA Pricing Review*, which has left several practical questions regarding the implementation of pricing changes unanswered. This may be contributing to the uncertainties observed in the current survey.

“...I am confident with the product we are bringing to the market and believe that location and quality finishes, with practical living spaces provide an appealing home.”

- Response from SDA provider, slightly confident.

“We are confident that there is still an ongoing need for quality SDA housing built to the needs of participants...” - Response from SDA provider, very confident.

Secondly, providers noted feelings of **optimism because of NDIA policy changes and updated market data** ($n = 8$) in explaining why they felt confident in the market. Most notably, providers referred to the recent *SDA Pricing Review* providing the market with more certainty around NDIA's commitment to SDA, information about demand (i.e. in terms of where and what to build), as well as financial security due to the price increases, particularly for previously underfunded categories. Providers also referred to updated market data, such as demand and supply data, more broadly.

“NDIA data suggests continuing demand for SDA properties, and the recent SDA Pricing Review has lifted prices to a more attractive level for impact investors.” -

Response from SDA provider, slightly confident.

“Latest pricing review seems to highlight the types/locations of dwellings the NDIA is [signalling] the market to build. Approvals are seemingly coming back somewhat more aligned to what is requested in reports/home and living applications.” -

Response from SDA provider, slightly confident.

“...The NDIS price review also gives us confidence in the ability to provide [SDA housing] in the current building environment and that the NDIA are committed to the ongoing funding of these homes.” - Response from SDA provider, very confident.

Despite feeling confident in the market, providers also expressed concerns **navigating a complex market and funding challenges** ($n = 6$). Similar to the difficulties acknowledged by providers who reported feeling unconfident or neutral, these providers re-emphasized the slow NDIA processing times, funding and financial constraints, and the lack of a comprehensive SDA market.

“The process is very complex, nothing is guaranteed, it's a very thin market and very few including those inside the NDIA fully understand it.” - Response from SDA provider, slightly confident.

“There is a definite need for housing, the challenge is in people having the funding in their plan for both SDA and SIL and the challenge of getting it into your plan if you don't. This challenge applies equally to both SDA and SIL funding.” - Response from SDA provider, slightly confident.

The last theme highlighted that providers felt confident due to **positive outcomes from building relationships** ($n = 3$). Providers reported an increase in stakeholder

relationships (e.g., support providers, support coordinators, tenants) which helped them to gain more experience operating in the SDA market. As such, this aided in their confidence and helped ensure the participants' needs and preferences were at the forefront of their build perspective.

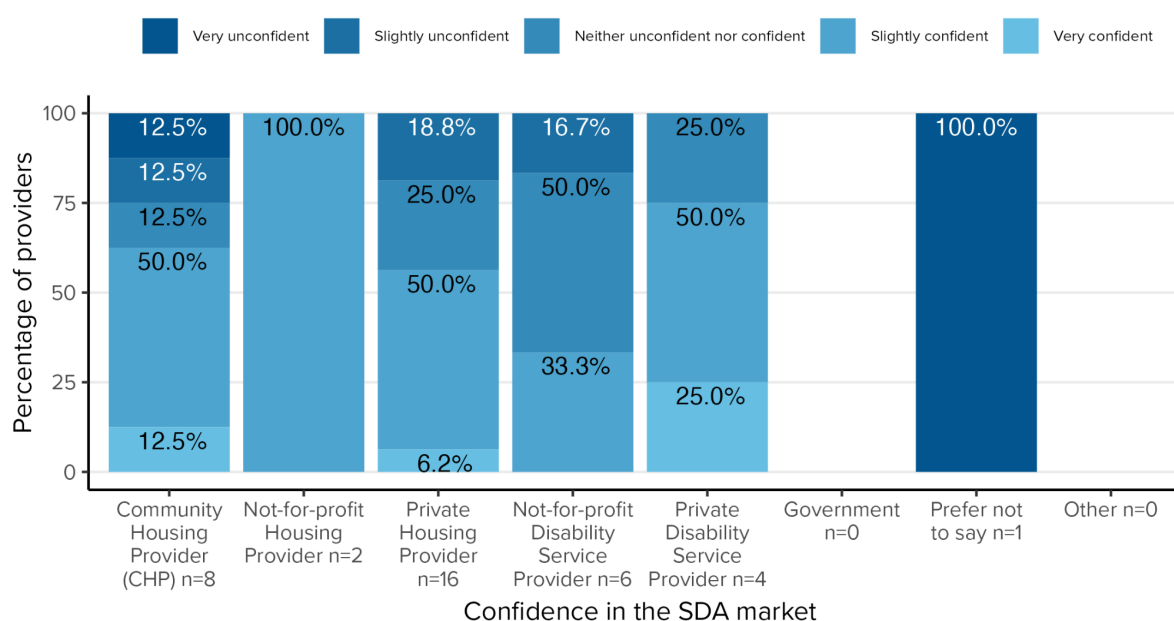
“We now have a lot more experience in this space, gained from relationships with support providers and support coordinators” - Response from SDA provider, slightly confident.

“We understand and believe in the market. We provide above the SDA recommendations from a build perspective and always consider what is best for participants.” - Response from SDA provider, very confident.

Confidence levels by organisation type

Confidence levels across the different organisation types who participated in this survey appeared to vary, as shown in Figure 8. Ratings of being unconfident in the market were consistently outweighed by ratings of being confident. Private disability service providers appeared to have the greatest confidence in the market, with 75.0% reporting being ‘slightly confident’ or ‘very confident’. CHPs and private housing providers displayed a large percentage of high confidence ratings (62.5% and 56.2%, respectively), but also the highest percentage of non-confidence ratings (25.0% and 18.8%, respectively). Though only a small sample of 2 providers, the not-for-profit housing providers showed slight confidence in the SDA market.

Figure 8 – Providers’ current confidence in the SDA market in 2023 ($n = 37$) by organisation type

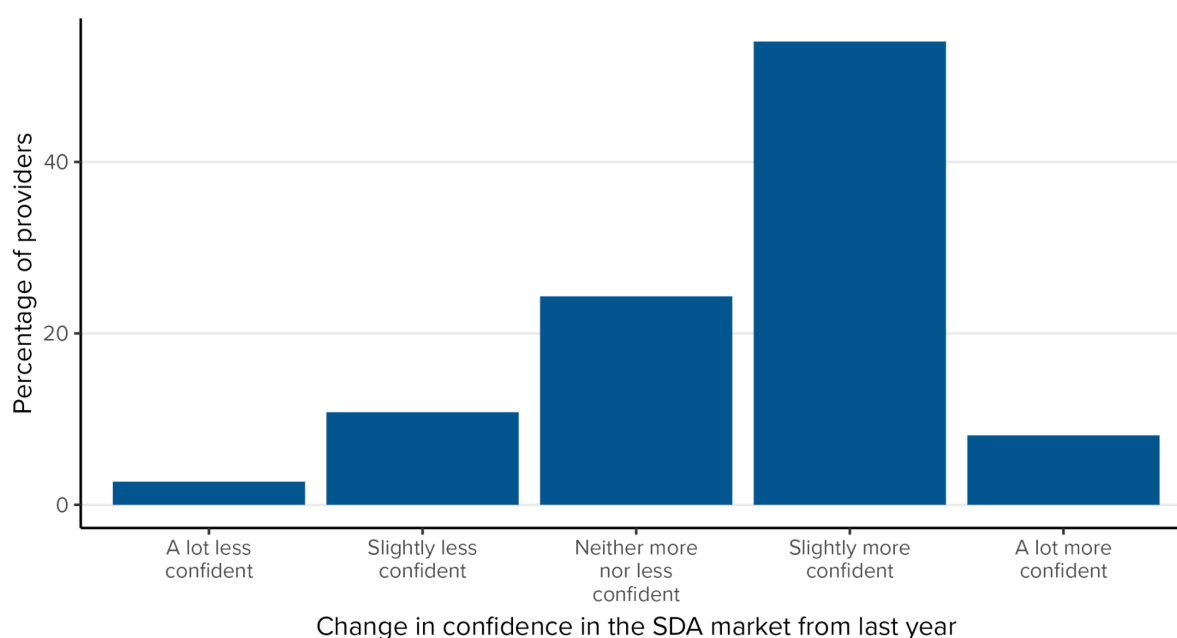


Note: ‘Prefer not to say’ only consisted of 1 respondent; therefore, this proportion needs to be interpreted with caution.

Change in level of confidence and explanation for the change

Confidence in the SDA market can fluctuate over time in response to factors internal and external to providers. When comparing their current confidence to their confidence from 12 months ago (shown in Figure 9), most providers indicated they were 'slightly more confident' (54.1%). Almost one-quarter of providers were 'neither more nor less confident' (24.3%), while 10.8% of providers stated they were 'slightly less confident'. An overall increase in confidence is consistent with the above comparison between the confidence levels of 2022 and 2023.

Figure 9 – Change in providers confidence levels in the SDA market over the past 12 months ($n = 37$)



Responses from SDA providers regarding why their confidence levels in the SDA market have changed compared to last year were split into 2 groups: (1) feeling less confident than last year, and (2) feeling more confident this year. As above, these responses were also summarised and grouped into higher order themes.

Themes among providers feeling less confident in the market this year

Two themes relating to feeling less confident in the SDA market this year were identified. The first theme relates to **concerns operating within current market conditions** ($n = 4$). One provider spoke about SDA developments being driven by financial reasons of the investors rather than the needs of people with disability. There were also some issues relating to diminishing returns, and SDA prices not matching market conditions and vacancies, which is similar to the concepts identified in the above unconfidence theme of financial concerns and market dynamics.

“A lot more SDA providers that are building bulk SDA in areas that will result in an oversupply. Unfortunately a lot of these will end up with considerable [vacancies]. Some of the providers are building without knowledge of practical and functional housing and just building with the focus of getting a high return on investment, instead of hearing the market and building to the needs of individuals.” - Response from SDA provider, slightly less confident.

The second theme of having less confidence this year was due to **difficulties with NDIA processes and approvals** ($n = 3$), which was also identified in the justifications for current levels of unconfidence. Given the similarity, please see the description above.

Themes among providers feeling more confident in the market this year

The majority of the providers that responded to this question stated that they were more confident in the SDA market this year compared to last year (22 out of 27 providers). Three key themes emerged, with the most common explanation of more confidence in the market being the **positive response to the SDA Pricing Review** ($n = 14$). This theme was fairly similar to what was described in the above section ‘Themes among providers who were slightly or very confident’. Providers again stated that the SDA Pricing Review has fostered more confidence in the market as it signals the commitment from the NDIA to continue supporting SDA. Moreover, the pricing changes were believed to help correct the overinvestment in High Physical Support apartments, and better support the construction of Improved Liveability and Robust dwellings, which will help stabilise the market.

“The NDIS has reviewed pricing for the 23/24 financial year which seems to indicate the government's willingness to support housing in this sector” - Response from SDA provider, a lot more confident.

“The results of the SDA Pricing Review were generally positive, particularly in relation to the uplift in funding for lower design categories, across a range of dwelling types. These factors have increased our confidence in the SDA market when compared to 12 months ago.” - Response from SDA provider, slightly more confident.

“Pricing review brought some needed [price] changes to make it more viable. We just didn't know what way the NDIA would go with everything so great to see it and it takes away a bit of fear about things.” - Response from SDA provider, slightly more confident.

The second theme related to **organisational growth and strategic planning** ($n = 6$) as an explanation for increases in confidence. Providers cited having up-to-date knowledge, education, and experience as important assets in navigating the SDA environment. This also included providers looking for strategic partnerships and consulting with people with disability.

“As an [organisation] we have made ourselves better informed. We have made significant attempts to look for strategic partnerships and consult with people with disability.” - Response from SDA provider, slightly more confident.

Lastly, the third theme of **improved market conditions and participant engagement** ($n = 5$) and how it changed confidence levels this year, is similar to the above confidence theme of strong demand and market engagement. However, providers placed more emphasis on the involvement and understanding of SDA from support coordinators and other stakeholders as contributors to their change in confidence levels. It was also noted that an increase in market activity, increased confidence in the commitment from the NDIA to make SDA work, more housing enquiries, and having successful tenant experiences helped change confidence levels.

“More participants & support coordinators are learning what SDA is and working on trying to get the funding” - Response from SDA provider, a lot more confident.

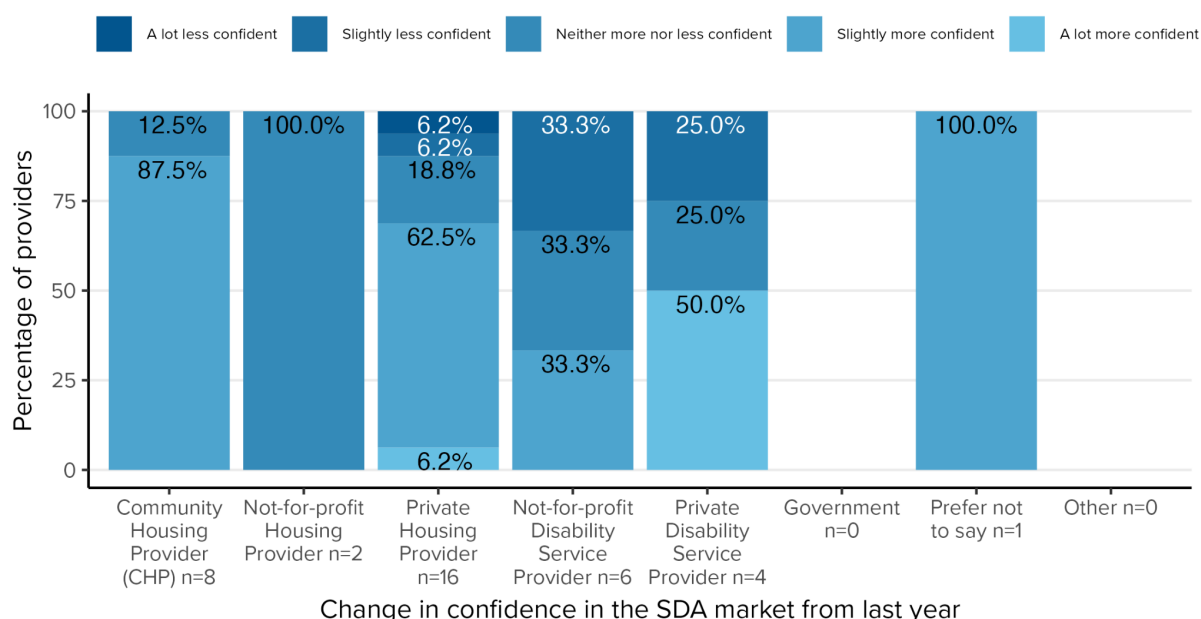
“NDIA is showing a stronger intention to making NDIS work than before 2022. A year ago it felt like 'wait and see', we are now seeing some signs of SDA becoming more realistic for more people (but only incrementally).” - Response from SDA provider, slightly more confident.

“Significant increase in enquiries, and success in tenanting our vacant dwellings.” - Response from SDA provider, slightly more confident.

Change in confidence levels by organisation type

Providers' changes in confidence over 12 months was also examined across organisation types. CHPs, private housing providers, and private disability service providers all reported being more confident than last year (87.5%, 68.8%, 50.0%, respectively), while not-for-profit disability service providers had an even portion of increased and decreased confidence (33.3% each). The breakdown of ratings is shown in Figure 10.

Figure 10 - Change in providers' confidence in the SDA market since 2022 (n = 37) by organisation type



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

Impact of the SDA Pricing Review

The *SDA Pricing Review*,⁴⁸ released by the NDIA in June 2023, represents a significant step in reevaluating the funding amounts allocated to SDA by examining the underlying assumptions used to calculate SDA prices and assessing the impact of current prices on the availability of SDA properties. In this pricing review, most types of building configurations have seen an increase in their pricing, except High Physical Support dwellings, which were believed to have been priced too high in the past. Furthermore, there have been proposals to raise the costs associated with maintenance, property management, and tenancy management to better reflect the actual expenses incurred in providing SDA services in the current economic environment. The changes in SDA pricing set out in the pricing review are aimed at encouraging the construction of SDA properties that align more closely with participant demand, rather than focusing primarily on High Physical Support dwellings. This shift in pricing is expected to contribute to ensuring that participants have access to SDA homes that genuinely cater to their specific needs and attract investment in the SDA market.

⁴⁸ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 - Final report*. National Disability Insurance Agency.

<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

Impact on Enrolled Dwellings

Providers were asked to respond 'yes' or 'no' to whether they think the changes in SDA pricing will impact their enrolled SDA dwellings. Of the 40 providers who completed this question, 26 responded 'yes' with 14 responding 'no'. Providers were also given the opportunity to give a short answer to their response, with these being summarised and grouped into high-order themes.

Providers who responded 'no' impact on enrolled dwellings

Providers reported three reasons for why pricing changes will not impact their enrolled SDA dwellings.

The most common reason was that the pricing changes **had minimal or no impact due to the organisation's specific market approach** ($n = 7$). Specifically, providers reported that the pricing changes evened themselves out because they had a diverse portfolio (i.e. some dwellings saw pricing increases while others saw pricing reductions) or because the reduced location factors of their dwellings evened out the annual base increase in pricing. Lastly, 1 provider noted using a conservative approach in financial modelling, such that the pricing changes do not have an impact on the overall financial model of their business.

"No - [Our] already enrolled dwellings conservatively [modelled] with lower levels of SDA payment than they are eligible to receive. Therefore, changes to SDA pricing whether they be increases or small decreases do not have a significant impact on the [SDA provider's] financial model. The factor that has the single biggest impact on the [SDA provider's] financial model is the presence and ongoing risk of long term vacancies in new build stock." - Response from SDA provider.

"[No] Because we hold a diverse portfolio of different types of dwellings, the impact of the pricing changes is largely evened out where we have increases in some areas and decreases in others." - Response from SDA provider.

Secondly, some providers reported that due to their **commitment to providing quality SDA** ($n = 3$), the pricing changes will have minimal impact on their development goals. As such, irrespective of pricing changes or challenges, providers voiced a strong commitment to consistently providing high-quality SDA housing.

"No - [SDA provider] will continue to build quality housing for people with disability irrespective of pricing changes" - Response from SDA provider.

Lastly, 2 providers felt that **other factors have more impact** on their operations than the pricing changes, including difficulties finding tenants to fill vacancies.

Providers who responded 'yes' to the impact on enrolled dwellings

The most common reason from the providers who responded 'yes', was that there would be **financial impacts from the pricing changes** ($n = 14$). Whether these impacts were perceived as positive or negative appeared to largely depend on the providers' portfolio. The majority of providers were optimistic of the new pricing structure as it was thought to lead to more revenue, investor interest, and sustainable business operations (e.g., redirecting more money into property maintenance). However, for some providers the pricing changes were reported to lead to a reduction in their financial returns because their portfolio consisted of dwellings (i.e. single-occupancy apartments and some locations) for which funding amounts are set to reduce. Similarly, 2 providers reported a mix of positive and negative financial impacts, with some of their dwellings set to increase and others set to decrease in funding amounts.

"Yes - The increased prices will make a significant contribution to available funds for property maintenance and to offset the loss of revenue through vacancies." -

Response from SDA provider.

"Yes - Some places have gone up in prices but my regional apartments have had a huge pay cut, but such is life. [...]" - Response from SDA provider.

Another theme that emerged from why providers believed pricing changes would impact their current SDA dwellings was **increasing flexibility and diversity in housing options** ($n = 9$). Providers reported that the pricing change has enabled more flexibility in terms of who can live in certain design categories of SDA (i.e., participants with an Improved Liveability determination to live in a High Physical Support dwelling) and a renewed focus of other neglected design categories and dwelling types.

"Yes - Appendix H will allow more participants to live together irrespective of their SDA eligibility. It is also making it more desirable to property owners to accept." -

Response from SDA provider.

"Yes - Working with SDA providers who had previously been focused on higher return on investment SDA often did not consider the more predominant NDIS participants who were more likely to receive Improved [Liveability] or Fully Accessible 'shared'. On review, the new pricing regime will allow for the consideration of alternative SDA development with better outcomes based on NDIS participants actual SDA funding. In my discussion with our partner SDA providers since the pricing changes were announced there is now genuine interest in some categories previously left out." -

Response from SDA provider.

Impact on pipeline dwellings

Similar to above, providers were also asked to state a 'yes' or 'no' response to whether they think the pricing changes will impact their planning for SDA dwellings in current or future pipelines. A total of 25 providers responded with 'yes', with 16 providers anticipating no impact on their SDA planning. Providers could also enter an explanation as to why they responded either 'yes' or 'no', with these explanations being summarised and grouped into overarching themes below.

Providers who responded 'no' impact on SDA planning

The reasons for why the pricing changes were thought not to impact current or future pipelines were similar to the reasons reported for enrolled dwellings (see section 'Providers who responded 'no' impact on enrolled dwellings'). Specifically, providers felt the changes had no impact due to their **commitment to providing quality SDA** ($n = 10$), their **organisation's specific market approach** ($n = 2$), and because **other factors have more impact** ($n = 2$).

Interestingly, 1 provider voiced concerns that the pricing changes may lead to a new type of SDA supply imbalance, whereby the increased incentives to build Improved Liveability dwellings may see a shift to an undersupply of Fully Accessible and High Physical Support dwellings (see quote below).

"No - We hope not. As we work with private investors who own and build the properties, we hope to see the same quality high spec'd properties still being developed. Our concern is that people are going to see the cost saving opportunity of only building to Improved Liveability and therefore potentially see a shift to undersupply in Fully Accessible and High Physical Support builds." - Response from SDA provider.

Providers who responded 'yes' to the impact on SDA planning

Providers highlighted 3 key reasons as to why the pricing changes are expected to impact their current or future pipeline.

Most commonly, providers reported that they may **change the design categories, building types, and locations of their pipeline dwellings** due to the pricing review ($n = 12$). In particular, providers noted a potential shift towards considering building more SDA properties outside of urban areas, more Improved Liveability dwellings, and more Houses and/or Villas.

"Yes - It has given us greater confidence and ability to develop a pipeline of Houses and Villas, and [assists] with back filling [vacancies]." - Response from SDA provider.

"Yes - It will make us rethink some options. Improved [Liveability] is much more viable than before." - Response from SDA provider.

Secondly, providers noted **financial impacts from the pricing changes** ($n = 7$), with most providers stating that the pricing changes will make their future projects financially more viable.

“Yes - New pricing makes new builds and ongoing maintenance more financially sustainable.” - Response from SDA provider.

Lastly, some providers explained that the pricing changes will encourage an **expansion of their pipeline** ($n = 6$). While this is a positive development in the SDA market, providers also noted that the increased interest in building SDA may lead to increased competition.

“Yes - It is dramatically increasing our build volume again to being closer to 2021 - but I am sure it is for other providers/builders also - so we have an eye on how we can make our homes the top choice for participants via designs and inclusions.” - Response from SDA provider.

Property and tenancy management

SDA property management

Of the 37 surveyed providers, all but 1 managed their own SDA properties. The provider who did not manage their own properties engaged the services of multiple local organisations for property management, and was satisfied with these organisations.

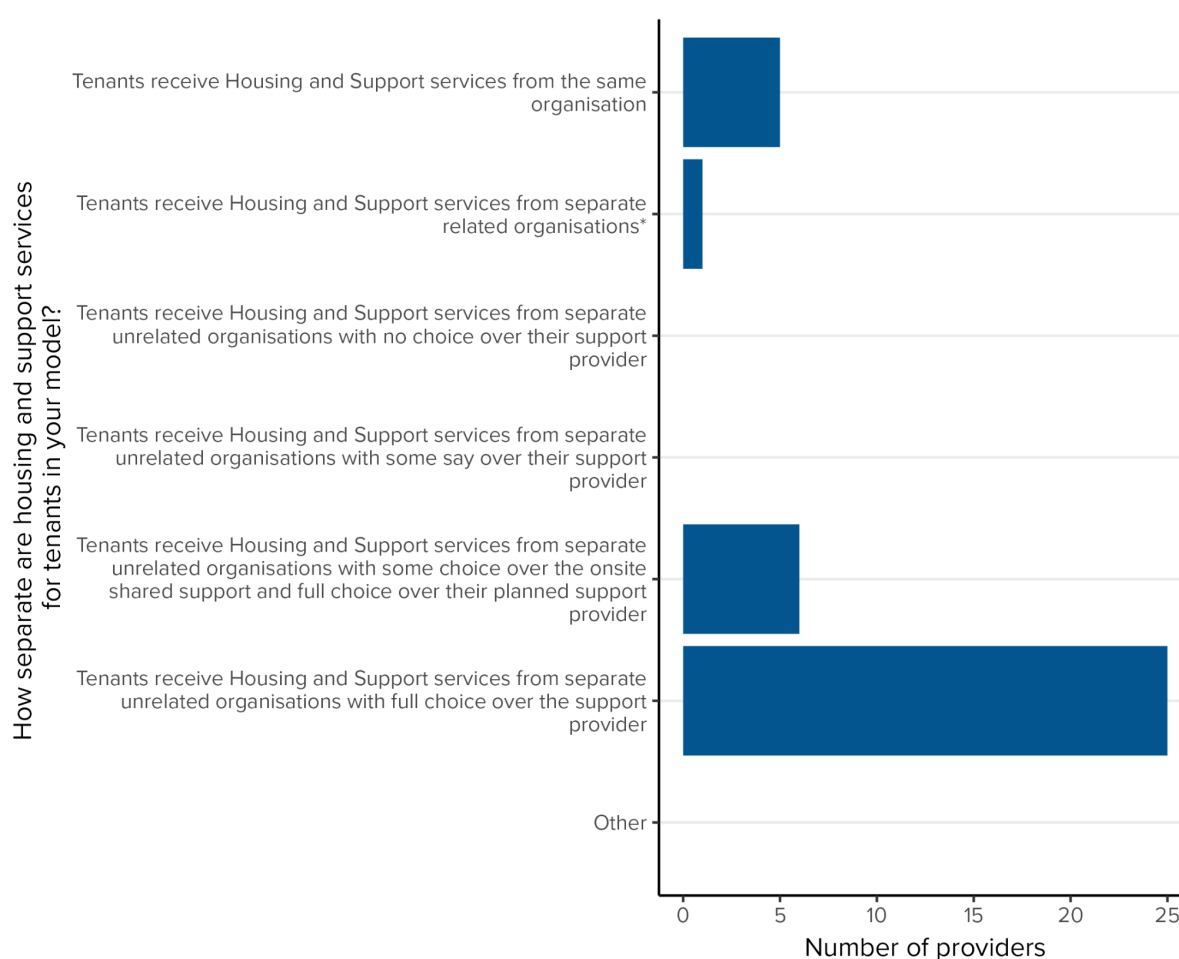
SDA tenancy management

Similarly, most providers (94.6%) also managed their SDA tenancies themselves, with only 2 providers engaging other organisations (i.e., a CHP and a private company) to do so. These providers were ‘satisfied’ and ‘very satisfied’ with their tenancy manager, respectively.

Separation of housing and shared support services

Providers largely keep housing and support separate for their properties, with most providers indicating that tenants receive housing and support from separate, unrelated organisations (as seen in Figure 11). A large number of providers (67.6%) gave their tenants full choice over their support provider, and some (16.2%) gave their tenants some choice over the onsite shared support provider and full choice over the planned support provider. A subset of providers (13.5%) have housing and support services from the same organisation. This is a smaller portion than last year, indicating the market is further separating housing and support services.

Figure 11 - Models for separation of housing and support services ($n = 37$)



*Note: The separate organisations are related through corporate structures or personnel (management or directors).

Needs and preferences of people with disability

Level of understanding needs/preferences of people with disability

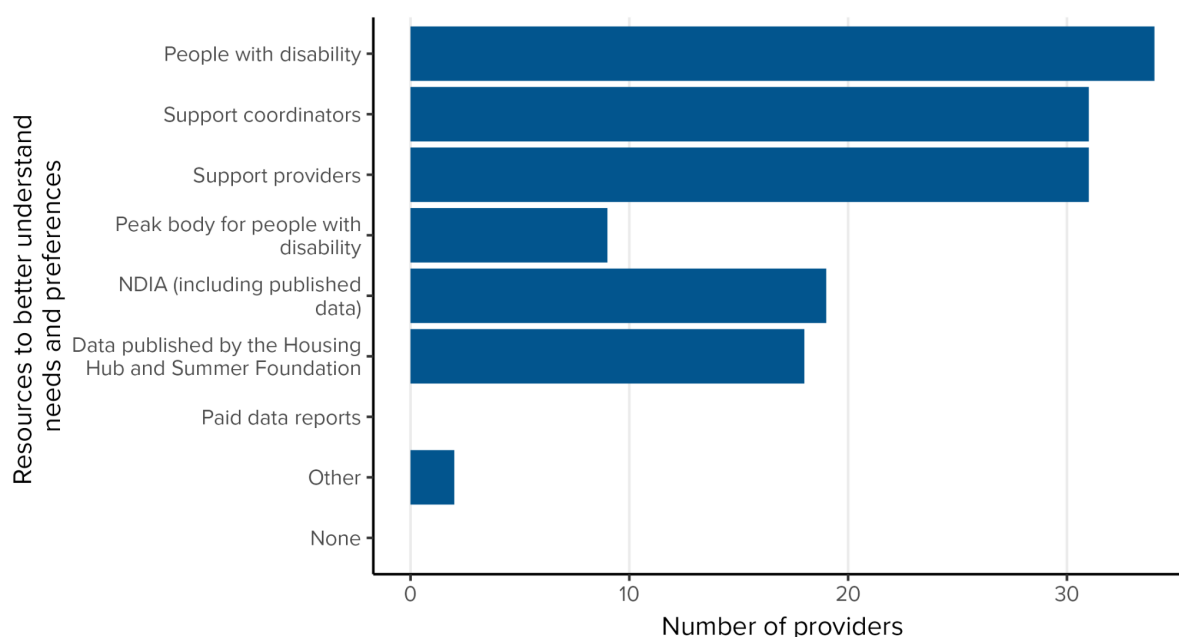
Providers were also surveyed on their agreement with the statement “I understand the needs and preferences of people with disability when building our SDA properties”. This was measured on a 5-point scale, where a 1 indicated they strongly disagreed with the statement and a 5 indicated strong agreement. On average, providers agreed with this statement ($M = 4.1$, $SD = 0.7$, $n = 36$). Only 1 provider (2.8%) strongly disagreed with the statement, and 2 (5.6%) neither disagreed nor agreed with the statement.

Resources used to understand needs and preferences

Providers indicated the resources they consulted to better understand the needs and preferences of people with disability to ensure the suitability of any planned SDA development. As with the responses to the previous questions about resources used,

many providers consulted with people with disability (91.9%), as well as support coordinators (83.8%) and support providers (83.8%). A smaller portion of providers consulted with the NDIA (including published data; 51.4%) and with data published by the Housing Hub and Summer Foundation (48.7%). Peak bodies for people with disability were consulted by 24.3% of providers, and 2 providers (5.4%) consulted with other resources such as occupational therapists and families of people with disability (Figure 12). On average, providers consulted with 3.9 resources ($SD = 1.6$, range = 1-6).

Figure 12 – Resources used by SDA providers ($n = 37$) to gain a better understanding of the needs and preferences of people with disability



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

Questions for people with disability

Providers were given the opportunity to report any questions they would like to ask people with disability to help better understand their needs and preferences. 16.7% of providers responded to this section of the survey and some of the responses highlighted the providers' commitment to maintaining consistent dialogue with tenants. The questions providers wished to ask were:

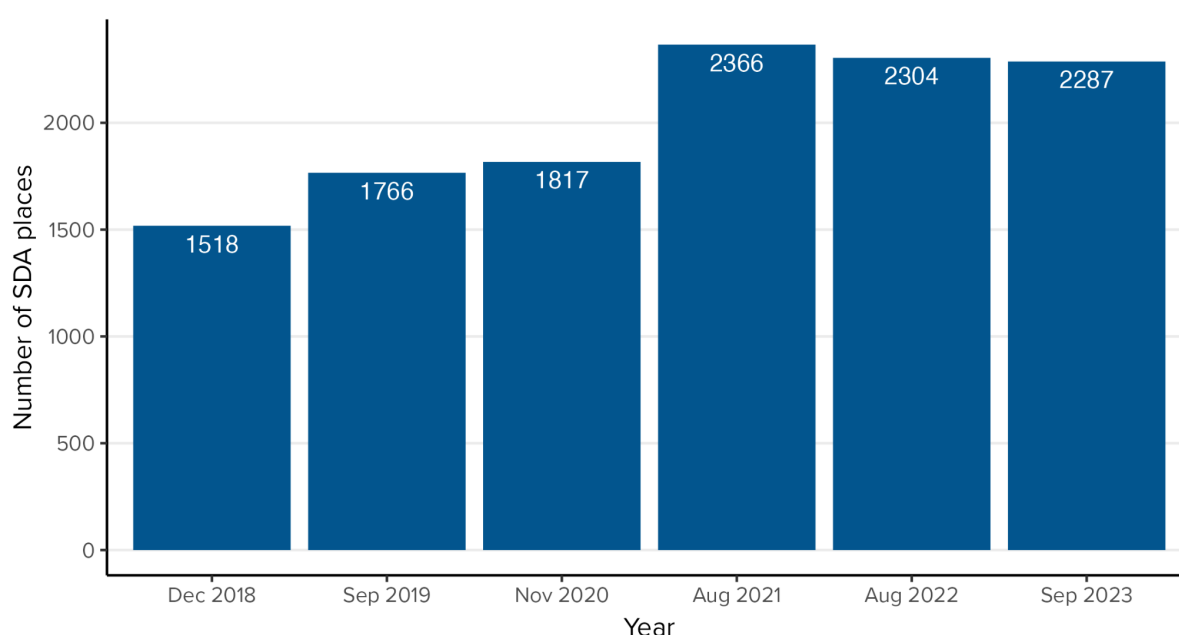
- “What do you think the built environment should look like?”
- “What additional amenities would help increase your independence?”
- “How the SDA decision was determined for the participant, as this doesn't often reflect the true wishes”

Results: SDA supply pipeline

The data from the pipeline survey consisted of the responses of 55 SDA providers. A total of 1,543 SDA dwellings were reported, consisting of 2,287 SDA places (an approximate average of 1.5 SDA places per dwelling).

In a comparison between the number of SDA places in providers' pipelines across the previous years' SDA supply surveys (see Figure 13), this year is roughly on par with the number of SDA places reported in the previous 2 SDA supply survey reports.⁴⁹

Figure 13 - Number of SDA supply pipeline places over time



The SDA supply survey largely focuses on SDA dwellings and places in the *pipeline*, not dwellings and places that are enrolled with the NDIA. This distinction is to reduce overlap with the NDIA's published data on enrolled dwellings. The number of enrolled SDA dwellings and places are compared to those in the pipeline in a later section of this report. Pipeline dwellings include all dwellings in any of the following stages of development:

- Construction completed, pending enrolment with the NDIA
- Under construction
- Development stalled
- Development and building approval completed and contractually committed to build

⁴⁹ Figure 13 shows that the general increase in SDA places over time appears to have stopped this year. However, it is important to note that fewer participants completed the survey this year than last year.

- Land secured, waiting for building approval and/or finance approval

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

SDA supply pipeline: National overview

Maximum number of residents

Table 2 shows the estimated dwellings and places across the maximum number of residents in a dwelling. The vast majority (68.4%) of SDA dwellings in the pipeline are being developed to accommodate 1 SDA resident. This continues the trend from previous SDA supply surveys of the market prioritising properties that enable independent living, as opposed to shared dwellings.

Table 2 - Number and percentage (%) of SDA dwellings ($n = 1,543$) and places ($n = 2,287$) in Australia by maximum number of residents

Maximum number of residents	Dwellings	% of dwellings	Places	% of places
1	1055	68.4%	1055	46.1%
2	265	17.2%	530	23.2%
3	191	12.4%	573	25.0%
4	31	2.0%	124	5.4%
5	1	0.1%	5	0.2%

Location

SDA dwellings are being developed across all states and territories in Australia, shown in Table 3. Over half of dwellings (56.6%) and places (59.6%) in the pipeline were reported in the eastern Australian states (Victoria, New South Wales, and Queensland). Victoria's pipeline dwellings and places have decreased noticeably from last year's reports. An increase in dwellings and places was reported in Western Australia this year (30.9% of dwellings, 28.0% of places), while South Australia's numbers remained similar to last year (9.3% of dwellings, 9.3% of places). Pipeline

dwellings and places in Tasmania, the Australian Capital Territory, and the Northern Territory made up the remaining 3.3% of dwellings and 3.1% of places.

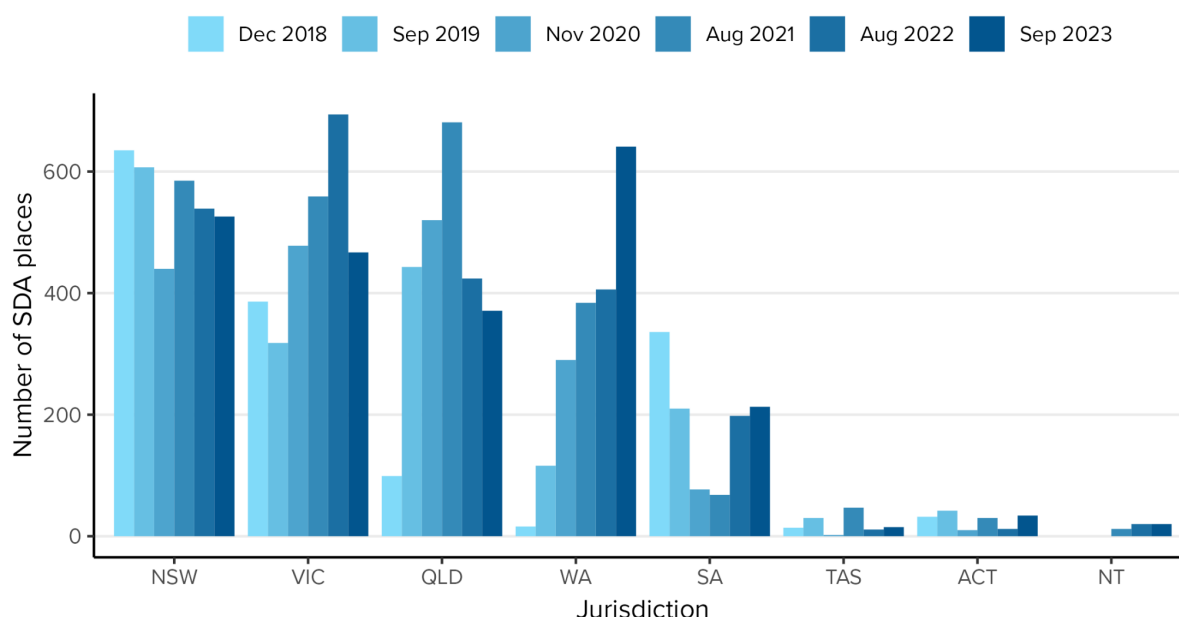
Table 3 - Number and percentage (%) of SDA dwellings ($n = 1,543$) and places ($n = 2,287$) by state and territory

Jurisdiction	Dwellings	% of dwellings	Places	% of places
NSW	343	22.2%	526	23.0%
VIC	313	20.3%	467	20.4%
QLD	216	14.0%	371	16.2%
WA	477	30.9%	641	28.0%
SA	144	9.3%	213	9.3%
TAS	10	0.7%	15	0.7%
ACT	27	1.8%	34	1.5%
NT	13	0.8%	20	0.9%

As mentioned above, the biggest change in SDA places in the pipeline came from Victoria and Western Australia. This is shown in Figure 14; the number of SDA places by state, across the 6 years of the SDA supply survey. Victoria's reduction in pipeline places (from 694 to 467) was mirrored by Western Australia's increase in reported places (from 406 to 641). Other states that saw reductions in SDA pipeline places were New South Wales (13 fewer places) and Queensland (53 fewer places). With the exception of Western Australia, the decrease in the number of pipeline places for Victoria, New South Wales and Queensland does not align with the projected demand for SDA in these states. Specifically, Victoria and New South Wales are expected to have the highest proportion of total demand by 2042 however, Queensland and Western Australia are expected to have the highest rate of increase in demand over

the next 2 decades.⁵⁰ Figure 14 also shows that South Australia saw an increase in places (15 more places), as did Tasmania (4 more places) and the Australian Capital Territory (22 more places). The Northern Territory maintained the same number of reported places. Victoria's sharp decrease in places marks the end of an increasing trend since 2019, while Western Australia's sudden increase has resulted in it being the state with the most pipeline dwellings and places.

Figure 14 - A comparison of SDA places in development over time



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

Building type

The NDIS provides SDA funding for 4 building types, according to the pricing arrangements for SDA.⁵¹ These are apartments, villas/duplexes/townhouses, houses, and group homes (refer to Appendix D for a brief description).

In last year's survey, apartments, villas/duplexes/townhouses, and houses were reported at roughly equal proportions, however this year, apartments consisted of the most SDA places (37.7%), followed by houses (33.1%), villas/duplexes/townhouses

⁵⁰ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 Demand Projections*. National Disability Insurance Agency. Downloaded 10 October 2023.

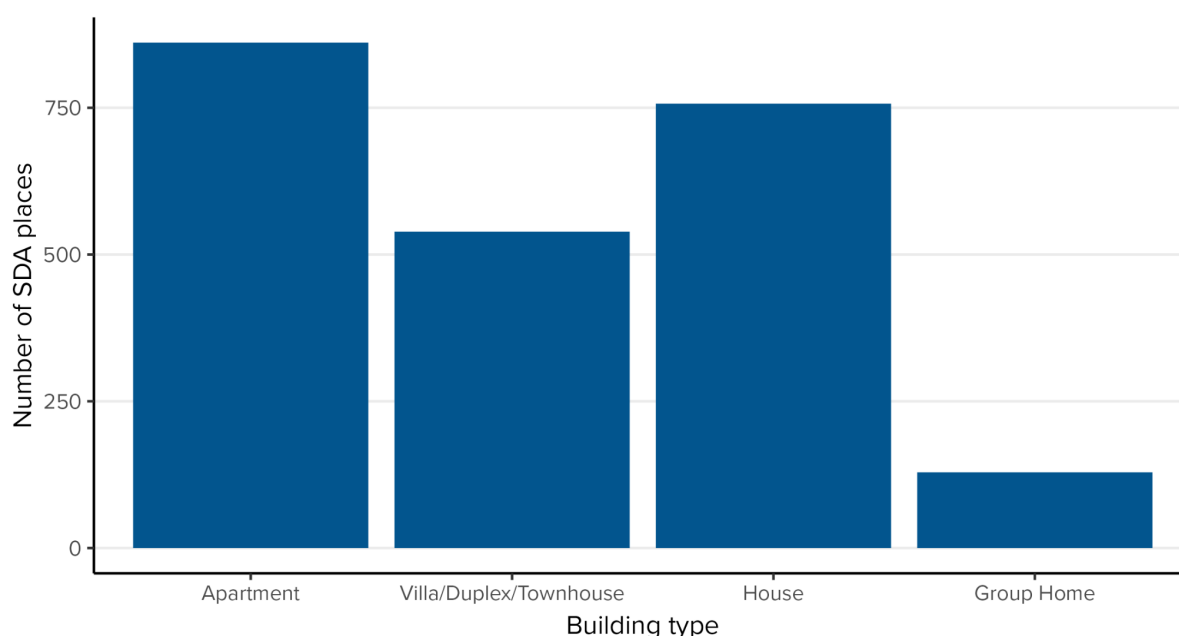
<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review#sda-demand-projections-report>

⁵¹ NDIA (2023). *Pricing arrangements for specialist disability accommodation*. National Disability Insurance Agency. Downloaded 31 October 2023.

<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments>

(23.6%), and group homes (5.6%). The breakdown of SDA places by building type for this year's survey is shown in Figure 15.

Figure 15 - Estimated number of SDA places ($n = 2,286$) by building type across Australia



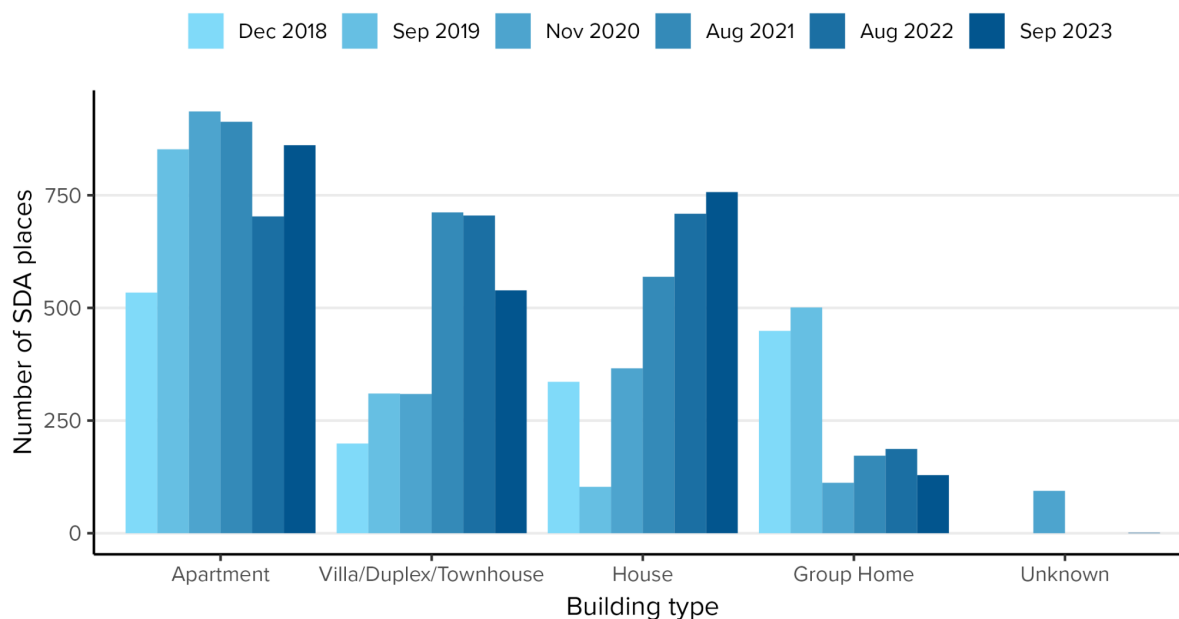
Note: 1 dwelling did not have a building type provided, and was removed from this analysis.

This breakdown of SDA places by building type over time is shown in Figure 16. Apartment SDA places have increased to a similar number as in 2020 and 2021, while villas/duplexes/townhouses have shown a decrease compared to last year. Houses have continued their steady increase since 2019, while group homes continue with a relatively low number of places. The low number of group homes in the SDA pipeline aligns with research that shows a preference for 1-resident dwellings.⁵² In addition, in the recent *SDA Pricing Review*, the NDIA has recommended that, in consultation with participants and providers, to phase out the ability for providers to enrol 4 or 5 resident group homes as SDA with the NDIA.⁵³

⁵² Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022). *Housing seeker snapshot*. Housing Hub and Summer Foundation.
<https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers?cs=reports-and-publications&ct=Publications%20&%20reports>

⁵³ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23 Final Report*. National Disability Insurance Agency. Downloaded 10 October 2023.
<https://www.ndis.gov.au/providers/housing-and-living-supports-and-services/specialist-disability-accommodation/sda-pricing-and-payments/sda-pricing-review>

Figure 16 - A comparison of SDA places in development by building type over time



Note: December 2018 (n = 1,518 places), September 2019 (n = 1,766 places), November 2020 (n = 1,817 places), August 2021 (n = 2,366 places), August 2022 (n = 2,304 places), September 2023 (n = 2,287 places). The dwelling with a missing building type from Figure 15 was included in this figure as 'unknown'.

Figure 17 shows the reported pipeline places for each building type across the different jurisdictions in Australia. Western Australia was developing the most apartments. The highest number of villas/duplexes/townhouses was in Victoria, while houses were most commonly being built in Queensland. Group homes were predominantly developed in New South Wales and Western Australia. Tasmania, the Australian Capital Territory and the Northern Territory showed the smallest numbers of pipeline places across all building types.

Figure 17 - Estimated number of SDA places ($n = 2,286$) across building type for each jurisdiction

Jurisdiction	Building type			
	Apartment	Villa/Duplex/Townhouse	House	Group Home
NSW	205	113	151	57
VIC	128	176	147	16
QLD	81	68	214	8
WA	382	66	148	44
SA	44	72	93	4
TAS	1	12	2	0
ACT	20	14	0	0
NT	0	18	2	0

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

Within the building types mentioned in this report, there are sub-classifications dependent on the number of residents and bedrooms. The number of SDA pipeline dwellings and places across these more specific categories is shown in Table 4.

Dwellings for 1 resident make up the vast majority of the total dwellings, with 2 bedroom apartments counting the highest number (38.5%).

Villas/duplexes/townhouses (18.6%) and 1 bedroom apartments (10.2%) add to this to total to approximately two-thirds of dwellings. Even though they provide just 1 SDA place each, the sheer number of planned 2 bedroom apartments for 1 resident still make it the category with the most number of SDA pipeline places (26.0%), followed closely by houses for 3 residents (22.7%). This high number of places for 3 resident houses does not match the reported preferences of people with disability for independent living options.⁵⁴ Very few 3 bedroom apartments are being developed (0.6% of dwellings) and only 1 group home for 5 residents appears to be in the pipeline.

⁵⁴ Wellecke, C., Robertson, J., Rathbone, A., Winkler, D., Aimers, N. (2022). *Housing seeker snapshot*. Housing Hub and Summer Foundation.
<https://www.housinghub.org.au/resources/article/housing-hub-data-snapshot-housing-seekers?cs=reports-and-publications&ct=Publications%20&%20reports>

Table 4 - Estimated number and percentage (%) of SDA dwellings ($n = 1,542$) and places ($n = 2,286$) by building type (granular breakdown)

Building type	Dwellings	% of dwellings	Places	% of places
Apartment, 1 bedroom, 1 resident	157	10.2%	157	6.9%
Apartment, 2 bedrooms, 1 resident	594	38.5%	594	26.0%
Apartment, 2 bedrooms, 2 residents	46	3.0%	92	4.0%
Apartment, 3 bedrooms, 2 residents	9	0.6%	18	0.8%
Villa/Duplex/Townhouse, 1 resident	287	18.6%	287	12.6%
Villa/Duplex/Townhouse, 2 residents	99	6.4%	198	8.7%
Villa/Duplex/Townhouse, 3 residents	18	1.2%	54	2.4%
House, 2 residents	127	8.2%	238	10.4%
House, 3 residents	173	11.2%	519	22.7%
Group home, 4 residents	31	2.0%	124	5.4%

Group home, 5 residents	1	0.1%	5	0.2%
Total	1,542	100%*	2,286	100%*

Note: 1 dwelling did not have a building type provided, and was removed from this analysis. 1 provider indicated they were building houses for only a single resident, though this is not a building type supported by the NDIA. This has resulted in the number of places for 2 resident houses appearing inconsistent with the number of 2 resident houses.

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

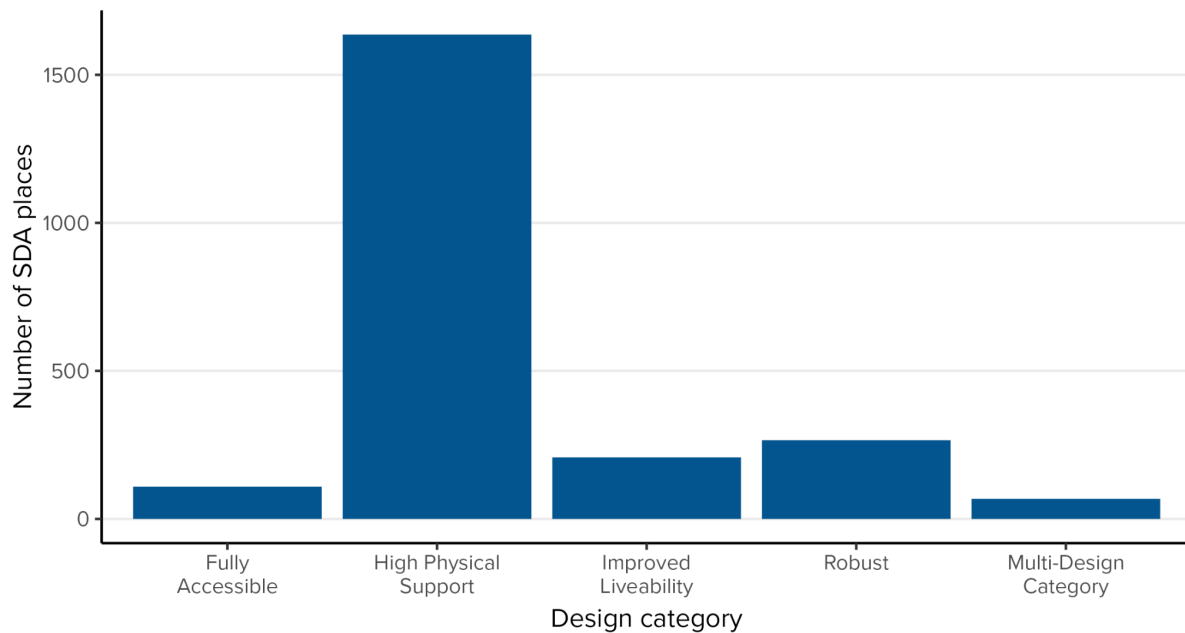
Design category

There are 5 design categories of new build SDA: Fully Accessible, High Physical Support, Improved Liveability, Robust and Multi-Design category. Refer to Appendix D for a brief description.

The number of SDA pipeline places for each design category is shown in Figure 18. High Physical Support is the most common, accounting for the largest number of places (71.5%).⁵⁵ Robust places (11.6%) and Improved Liveability places (9.1%) showed a similar number of places to each other, with Fully Accessible being the design category with the fewest places (4.8%). The final 3.0% of places were in dwellings that fit into the Multi-Design category. Of the 34 dwellings categorised as such, 25 of them will accommodate tenants with High Physical Support, Fully Accessible and Improved Liveability funding. Other combined design categories included High Physical Support/Improved Liveability (4 dwellings) and High Physical Support/Robust (3 dwellings), as well as 2 dwellings that did not yet have a design category.

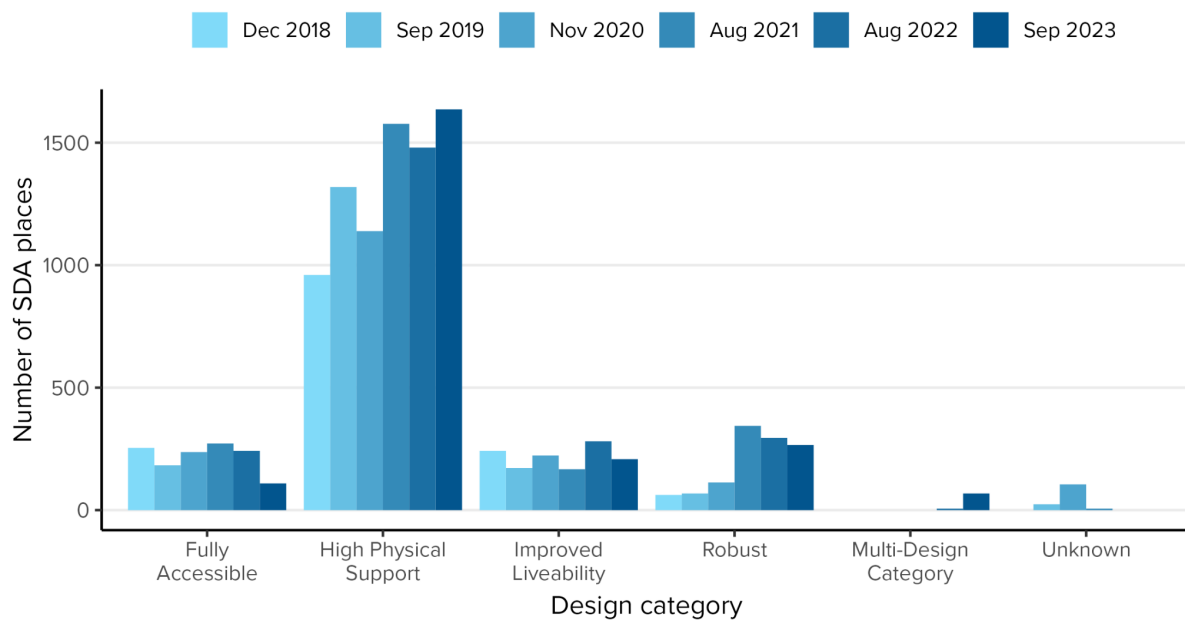
⁵⁵ Consistent with the 2021 and 2022 SDA supply survey reports, the number of High Physical Support places should be interpreted with caution as some providers have indicated that even though the dwelling will be enrolled as High Physical Support, they will accept tenants funded for a different design category such as Fully Accessible.

Figure 18 - Estimated number of SDA places ($n = 2,287$) by design category across Australia



This year's data is consistent with previous years' in that the High Physical Support category encompasses the most SDA pipeline places, as it has for every year of this survey. This year shows the largest number of High Physical Support places (1,636 places), while Robust (266), Improved Liveability (208), and Fully Accessible (109) have shown reduced numbers compared to last year. The number of places that fit into the Multi-Design category have increased from their first reporting last year (6 places to 68 places). These comparisons are shown in Figure 19 below.

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



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

The variation of design categories across jurisdictions in Australia is shown in Figure 20. High Physical Support was the most common design category across all jurisdictions, with Western Australia having the greatest number of High Physical Support places in the pipeline (563). New South Wales (337), Queensland (319), and Victoria (270) also showed a large number of High Physical Support places.

Figure 20 - Estimated number of SDA places ($n = 2,287$) across design category for each jurisdiction

	Design category				
	Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
NSW	22	337	81	72	14
VIC	50	270	14	115	18
QLD	10	319	18	24	0
WA	13	563	36	23	6
SA	14	89	59	21	30
TAS	0	12	0	3	0
ACT	0	34	0	0	0
NT	0	12	0	8	0

Building type and design category

As shown in Figure 21, High Physical Support is the most common design category across all building types, with apartments having the most High Physical Support places (772). Apartments also had the most Fully Accessible places (44), while villas/duplexes/townhouses had the most places for the Improved Liveability (95) and Robust (146) categories. Houses had the most places that fit into multiple of the design categories, with 50 places.

Figure 21 - Estimated number of SDA places ($n = 2,286$) across building type and design category in Australia

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	44	772	32	0	13
	Villa/Duplex/Townhouse	15	278	95	146	5
	House	33	509	61	104	50
	Group Home	16	77	20	16	0

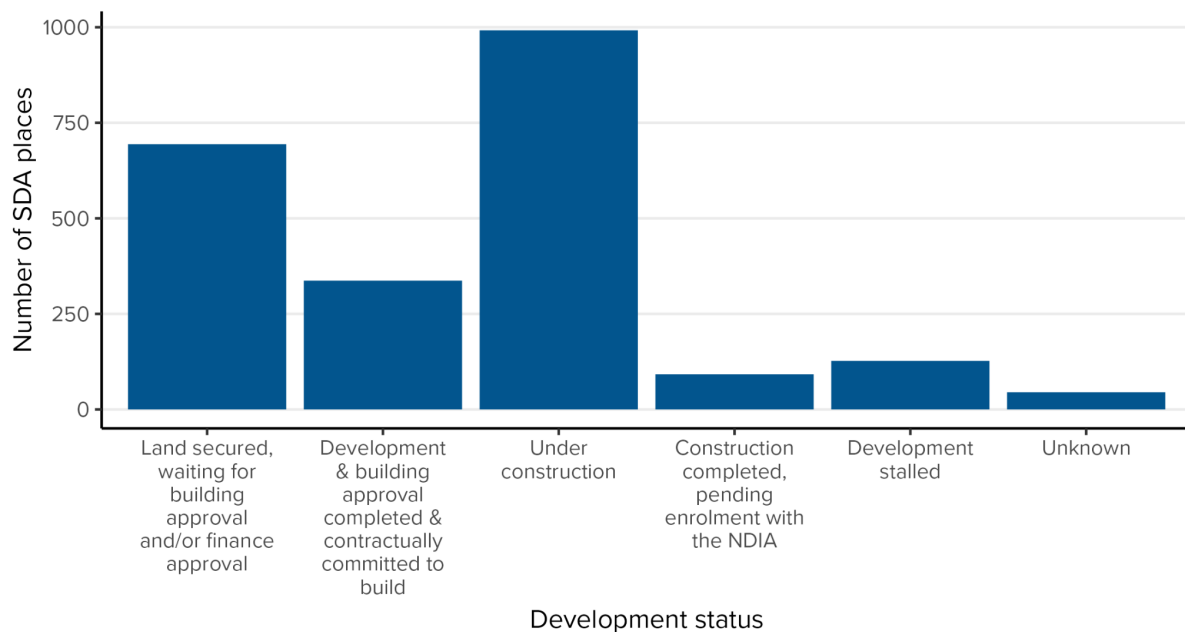
Note: The SDA Pricing and Payments guide does not allow Robust design in apartments. 1 dwelling did not have a building type provided, and was removed from this analysis.

SDA development status

Providers were asked to report the development status of their SDA developments, shown in Figure 22. The most common development status for SDA pipeline places was ‘under construction’ (43.4%), followed by ‘land secured, waiting for building approval and/or financial approval’ (30.4%). It should be noted that this stage is often at the highest risk of the development not going ahead and therefore reaching enrolment. This highlights that the reported places from this survey are not guaranteed to reach enrolment, and as such, the number of SDA dwellings and places reported in the pipeline must be interpreted with a degree of caution.

Assuming the building and/or financial approvals are achieved, the development will likely progress to ‘development and building approval completed and contractually committed to build’, which was the next most common development status (14.7%). Stalled developments accounted for 5.6% of pipeline places (with reasons including construction costs, uncertain commitment to their pipeline, and being in the concept planning stage) and 4.0% of places had completed construction and were pending enrolment with the NDIA. Some places did not have a development status provided (2.0%) and were classified in the analysis as ‘unknown’.

Figure 22 - Estimated number of SDA places ($n = 2,287$) by development status in Australia

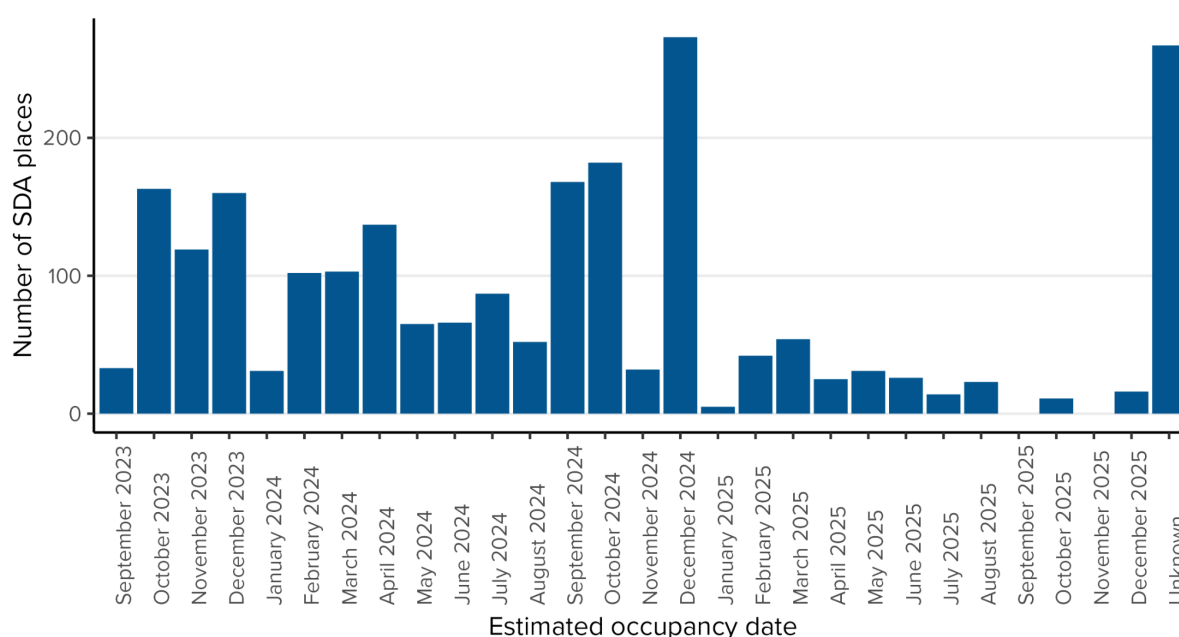


Note: The 45 SDA places that are listed as 'unknown' are both missing data from this year's survey as well as properties that were included from the 2022 pipeline data for which the current development status was unknown.

Estimated occupancy date

The reported dates of estimated occupancy for the pipeline places are shown in Figure 23. Many of the places were expected to be available for tenancy by December 2024, which was also the most common estimated month of occupancy. 20.8% of places were expected to be ready for occupancy by the end of this year, and a further 56.8% were expected to be ready by the end of next year. Only an additional 10.8% of places were expected to be ready by the end of 2025, however, developments may begin and finish between now and then. There were 267 places (11.7%) that were classified as having an 'unknown' occupancy date. Of these 267 places, 46 had an occupancy date in the past (i.e., earlier than the survey was completed) and were all pending enrolment with the NDIA. It is highly possible that these occupancy dates were not updated from last year when they were first reported. The remaining 221 places were missing an occupancy month, year, or both.

Figure 23 - Estimated number of SDA places ($n = 2,287$) by estimated date of occupancy in Australia

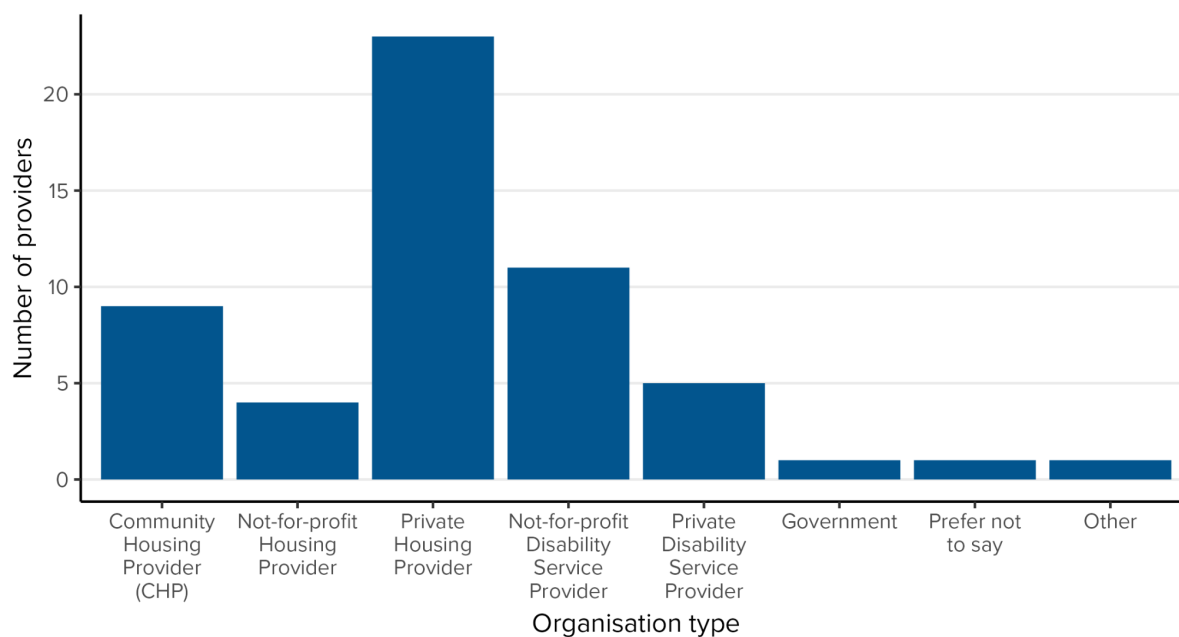


Note: Date of occupancy was unknown for 267 SDA places. Date of occupancy was coded as 'unknown' when there was a missing month or year of estimated occupancy, or an estimated occupancy date that was earlier than September 2023. Estimated dates for occupancy should be viewed with caution as the occupancy dates for some SDA places were carried forward from the previous survey and may no longer be accurate due to development delays.

SDA provider and developer profiles

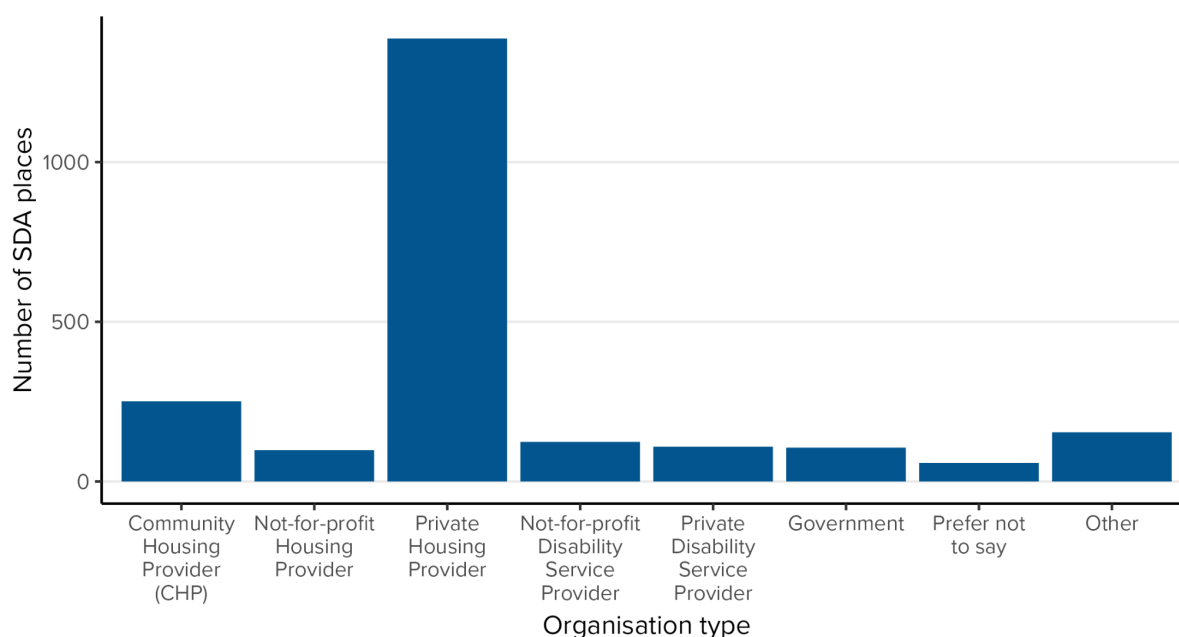
The number of providers who responded to the pipeline portion of the survey differed from the number who responded to the QuestionPro portion (i.e., the online survey, designed to assess providers' market approaches and levels of confidence). As such, the distribution of organisation types in this section differs from the distribution shown in Figure 1. Figure 24 is included below to show the types of organisations developing SDA across Australia. As shown, the majority of providers who reported their pipeline data were private housing providers (41.8%). The number of SDA pipeline places across the different organisation types is shown in Figure 25. Most of the pipeline places were reported by private housing providers (60.7%). However, as shown in Figure 24, the most surveyed organisation type was private housing providers, partially contributing to their large portion of places. The remaining organisation types reported a much smaller number of places, with CHPs being the next highest with 11.0%. The remaining organisation types all reported relatively similar numbers for SDA pipeline places.

Figure 24 - Types of providers developing SDA across Australia (pipeline data)



Note: As some providers did not complete the QuestionPro survey, they did not self-report their organisation type. In these cases, providers were looked up online and classified into 1 of the categories.

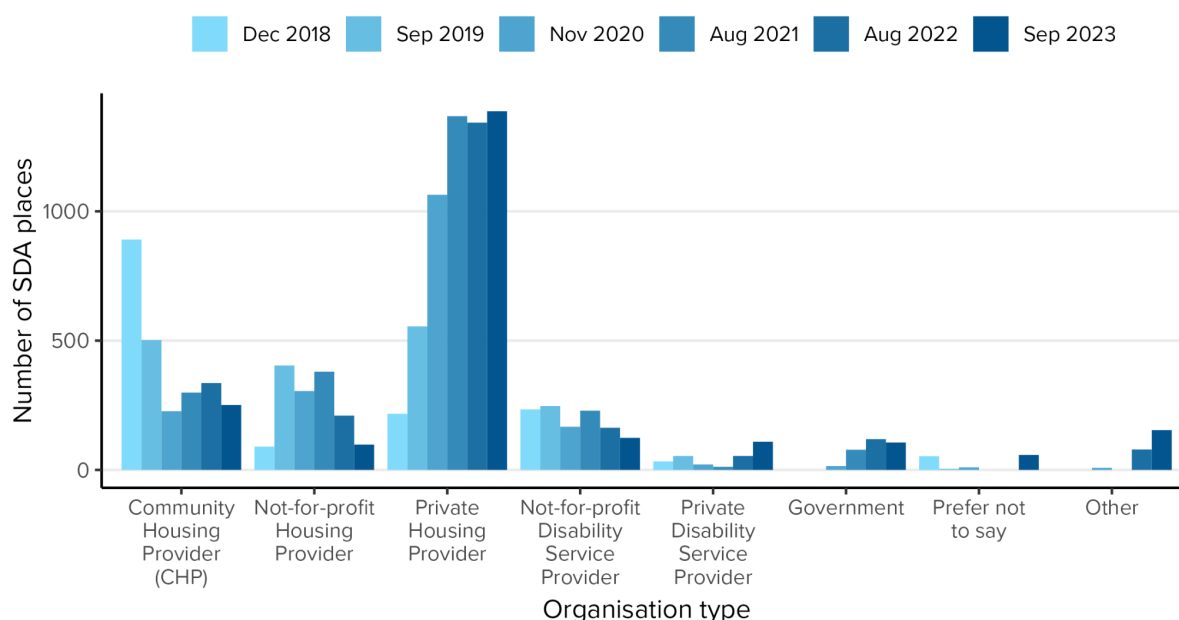
Figure 25 - Estimated number of SDA places ($n = 2,287$) by organisation type in Australia



The current data is compared to data from the previous years of the SDA supply survey in Figure 26. This year, private housing providers reported their highest number of SDA places, as did private disability service providers. Conversely, not-for-profit housing providers and not-for-profit disability service providers reported

their lowest number of places. CHPs and government providers have shown a slight decrease in places compared to last year.

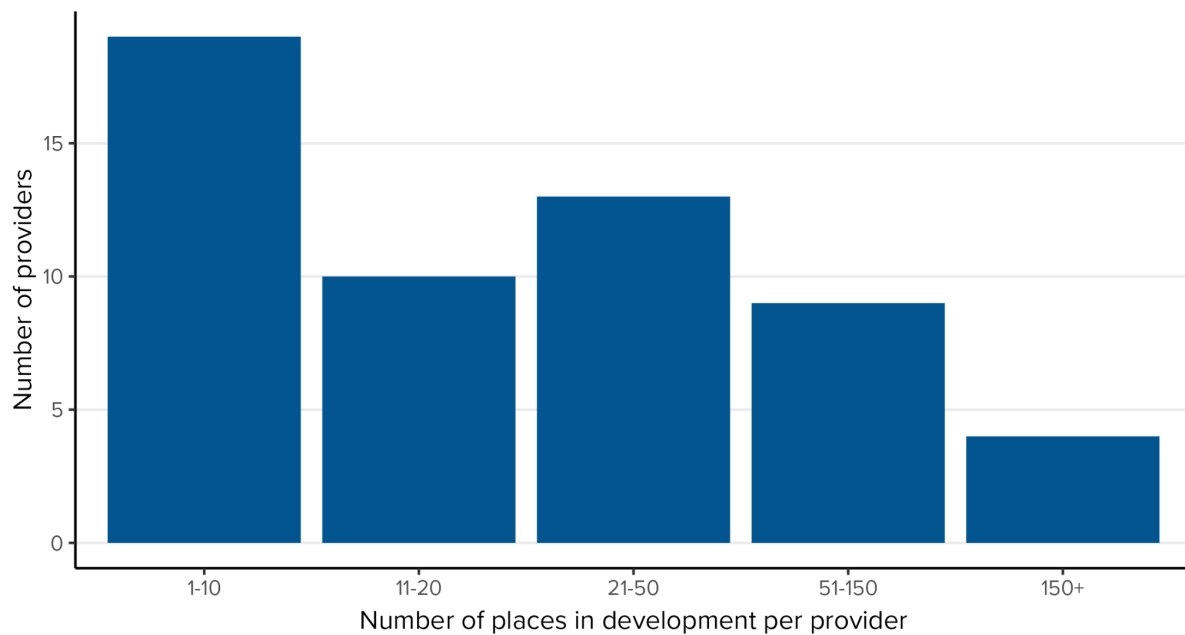
Figure 26 - A comparison of the estimated number of SDA places by organisation type over time



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

Providers vary on how many places they are developing (their scale of development activity; refer Figure 27). Most commonly, providers were only developing between 1 and 10 SDA places (34.6%). The next most common scale of development activity was between 21 and 50 places (23.6%), then between 11 and 20 places (18.2%), between 51 and 150 places (16.4%), and more than 150 places (7.3%).

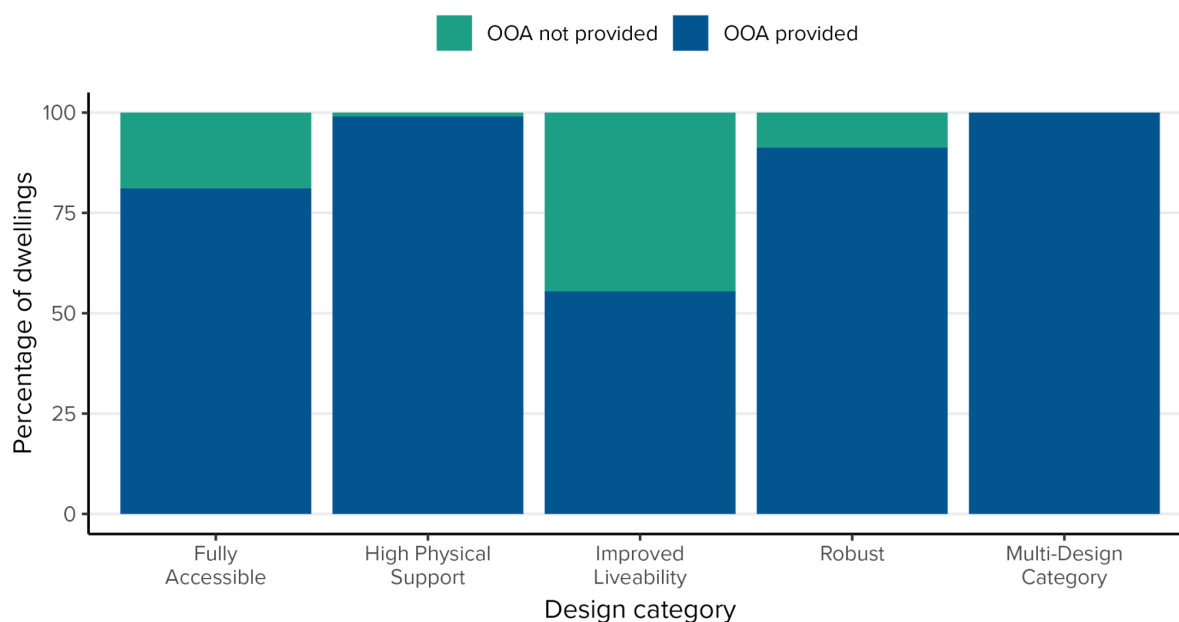
Figure 27 - SDA providers by scale of their development activity ($n = 55$)



Provision of on-site overnight assistance (OOA)

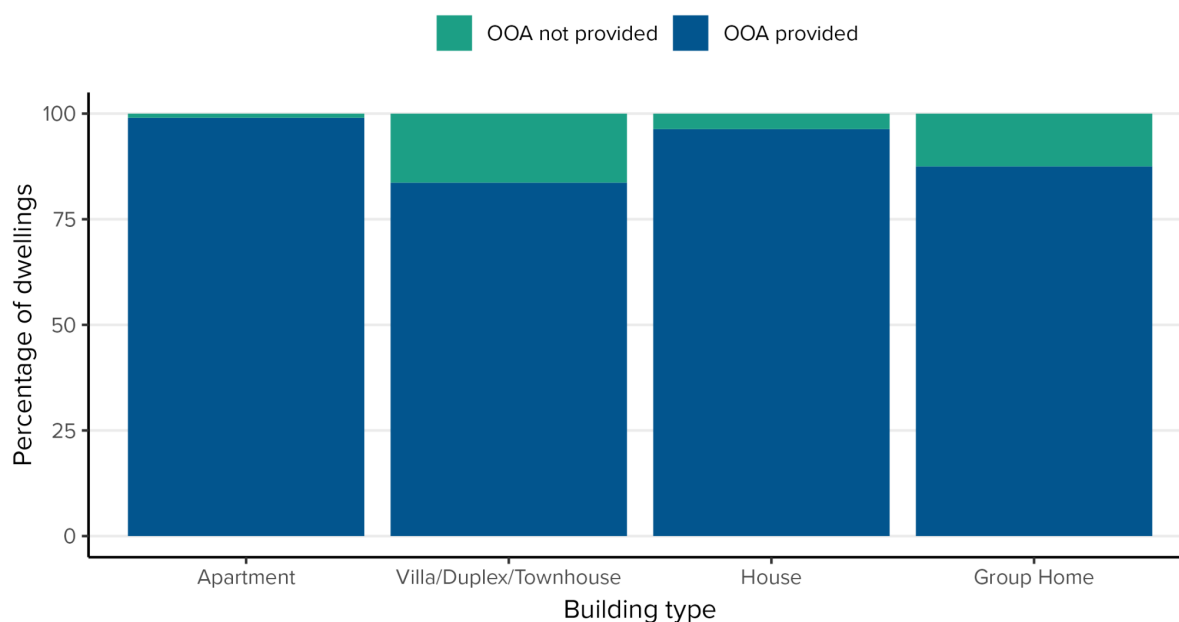
On-site overnight assistance (OOA) was reported to be planned for almost all SDA pipeline dwellings (1,454, 94.2%), as shown in Figure 28 below. Across the design categories, High Physical Support (99.0%), Robust (91.4%), and dwellings that fit multiple design categories (100.0%) reported very high levels of OOA presence. Dwellings in the Fully Accessible design category were reported to have lower provision of OOA (81.2%), while only slightly above half of Improved Liveability dwellings (55.5%) would provide OOA.

Figure 28 - Provision of OOA by design category ($n = 1,543$)



In Figure 29, OOA is broken down by building types. Apartments (99.0%) and houses (96.3%) were largely being planned to include OOA, as were group homes (87.5%) and villas/duplexes/townhouses (83.7%), though to a slightly lesser extent.

Figure 29 - Provision of OOA by building type ($n = 1,542$)



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

SDA supply pipeline: State and territory overview

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

New South Wales

In total, 343 dwellings with 526 places were reported to be in development in New South Wales, which is comparable to the number of developments reported in last year's SDA supply survey.

Also similar to last year's survey, the majority of the places in development in New South Wales were High Physical Apartments (170 places), followed by High Physical Support Houses (100 places). See Figure 30.

Figure 30 - Estimated number of SDA places across building type and design category in New South Wales ($n = 526$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	13	170	22	0	0
	Villa/Duplex/Townhouse	3	42	31	34	3
	House	2	100	12	26	11
	Group Home	4	25	16	12	0

As can be seen in Table 5, almost half of all the pipeline places in New South Wales were under construction. This was followed by a relatively even split between places with the development statuses 'Development stalled' (15.6%), 'Development & building approval completed & contractually committed to build' (16.2%), and 'Land secured, waiting for building approval and/or finance approval' (17.5%).

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

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	37	10.8%	92	17.5%
Development & building approval completed & contractually committed to build	69	20.1%	85	16.2%
Under construction	170	49.6%	236	44.9%
Construction completed, pending enrolment with the NDIA	13	3.8%	25	4.8%
Development stalled	52	15.1%	82	15.6%
Unknown	2	0.6%	6	1.1%
Total	349	100%	532	100%*

Note: The 6 SDA places that are listed as 'unknown' are missing data from this year's survey for which the current development status was unknown.

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

As shown in Table 6, the most common organisation type was private housing providers, who reported developing 41.3% of the pipeline places in New South Wales. In comparison to last year's survey, there has been an increase in places developed by private disability service providers, from 13 (2.4%) to 92 (17.5%) places.

Table 6 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in New South Wales

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	45	13.1%	93	17.7%
Not-for-profit Housing Provider	25	7.3%	36	6.8%
Private Housing Provider	153	44.6%	217	41.3%
Not-for-profit Disability Service Provider	44	12.8%	77	14.6%
Private Disability Service Provider	70	20.4%	92	17.5%
Government	0	0%	0	0%
Prefer not to say	0	0%	0	0%
Other	6	1.8%	11	2.1%
Total	349	100%	532	100%

Note: 1 provider's type did not fit the listed categories and has been listed as 'other'. This provider did not provide data in the QuestionPro survey, hence why no organisation types were listed as 'other' in the QuestionPro survey sections.

Victoria

In Victoria, a total of 313 dwellings and 467 places were reported to be in the pipeline, representing a decrease from last year's SDA supply survey.

Figure 31 shows that most of the places were being built to High Physical Support standards, comprising 108 places for apartments, 84 places for villas/duplexes/townhouses, and 70 places for houses. A relatively large number of pipeline places in Robust villas/duplexes/townhouses were also reported (76 places). This distribution is similar to the trends observed in last year's survey.

Figure 31 - Estimated number of SDA places across building type and design category in Victoria ($n = 467$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	7	108	0	0	13
	Villa/Duplex/Townhouse	10	84	6	76	0
	House	29	70	8	35	5
	Group Home	4	8	0	4	0

As seen in Table 7, the most common development status was 'Land secured, waiting for building approval and/or finance approval', comprising 42.2% of all pipeline places in Victoria. This was followed by approximately one-third (32.1%) of pipeline places under construction.

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

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	110	35.1%	197	42.2%
Development & building approval completed & contractually committed to build	67	21.4%	80	17.1%
Under construction	113	36.1%	150	32.1%
Construction completed, pending enrolment with the NDIA	4	1.3%	8	1.7%
Development stalled	11	3.5%	12	2.6%
Unknown	8	2.6%	20	4.3%
Total	313	100%	467	100%

Note: The 20 SDA places that are listed as 'unknown' are properties that were included from the 2022 pipeline data for which the current development status was unknown.

Similar to last year's survey, private housing providers developed the majority (60.4%) of the reported pipeline places in Victoria. See Table 8.

Table 8 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in Victoria

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	12	3.8%	21	4.5%
Not-for-profit Housing Provider	12	3.8%	16	3.4%
Private Housing Provider	215	68.7%	282	60.4%
Not-for-profit Disability Service Provider	6	1.9%	15	3.2%
Private Disability Service Provider	15	4.8%	17	3.6%
Government	49	15.7%	106	22.7%
Prefer not to say	0	0%	0	0%
Other	4	1.3%	10	2.1%
Total	313	100%	467	100%*

Note: 1 provider's type did not fit the listed categories and has been listed as 'other'. This provider did not provide data in the QuestionPro survey, hence why no organisation types were listed as 'other' in the QuestionPro survey sections.

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

Queensland

A total of 216 dwellings and 371 places were reported to be in development in Queensland. This demonstrates continued reduction in development activity in Queensland since 2021 (where 681 pipeline places were reported) and 2022 (where 424 pipeline places were reported).

As seen in Figure 32, the places being developed in Queensland were almost exclusively for High Physical Support houses (196 places), apartments (61 places) and villas/duplexes/townhouses (54 places).

Figure 32 - Estimated number of SDA places across building type and design category in Queensland ($n = 371$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	10	61	10	0	0
	Villa/Duplex/Townhouse	0	54	0	14	0
	House	0	196	8	10	0
	Group Home	0	8	0	0	0

Similar to the pipeline reported in last year's survey, almost half (48.5%) of all SDA places in development in Queensland were under construction. This was again followed by the development statuses 'Land secured, waiting for building approval and/or finance approval' (18.9%) and 'Development & building approval completed & contractually committed to build' (11.1%). See Table 9.

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

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	40	18.5%	70	18.9%
Development & building approval completed & contractually committed to build	25	11.6%	41	11.1%
Under construction	105	48.6%	180	48.5%
Construction completed, pending enrolment with the NDIA	13	6.0%	35	9.4%
Development stalled	21	9.7%	26	7.0%
Unknown	12	5.6%	19	5.1%
Total	216	100%	371	100%

Note: The 19 SDA places that are listed as 'unknown' are missing data from this year's survey for which the current development status was unknown.

As shown in Table 10, more than two-thirds (70.4%) of the SDA pipeline places in Queensland were being developed by private housing providers. This was followed by 20.2% of places being developed by a provider who did not fit the categories shown in Table 10.

Table 10 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in Queensland

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	25	11.6%	35	9.4%
Not-for-profit Housing Provider	0	0%	0	0%
Private Housing Provider	163	75.5%	261	70.4%
Not-for-profit Disability Service Provider	0	0%	0	0%
Private Disability Service Provider	0	0%	0	0%
Government	0	0%	0	0%
Prefer not to say	0	0%	0	0%
Other	28	13.0%	75	20.2%
Total	216	100%*	371	100%

Note: 1 provider's type did not fit the listed categories and has been listed as 'other'. This provider did not provide data in the QuestionPro survey, hence why no organisation types were listed as 'other' in the QuestionPro survey sections.

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

Western Australia

Last year's SDA supply survey reported an increase in pipeline places in Western Australia, from 384 places in 2021 to 406 places in 2022. Continuing this trend, this year's survey demonstrated significant growth in pipeline activity, with 477 dwellings and 641 places being developed in Western Australia.

The increase in pipeline places appears to be mainly due to a large increase in the number of High Physical Support apartment places (from 78 places in 2022 to 376 places in 2023). As seen in Figure 33, High Physical Support apartment places comprised more than half of all pipeline places in Western Australia in this year's survey.

Figure 33 - Estimated number of SDA places across building type and design category in Western Australia ($n = 640$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	6	376	0	0	0
	Villa/Duplex/Townhouse	0	51	6	9	0
	House	2	100	26	14	6
	Group Home	4	36	4	0	0

Note: Building type was not provided for 1 dwelling, which meant it was removed from this analysis.

Almost all of the pipeline places in Western Australia were either under construction (300 places; 46.8%) or awaiting building approval and/or finance approval (219 places; 34.2%). See Table 11.

Table 11 - Estimated number and percentage (%) of SDA dwellings and places by development status in Western Australia

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	191	40.0%	219	34.2%
Development & building approval completed & contractually committed to build	71	14.9%	107	16.7%
Under construction	205	43.0%	300	46.8%
Construction completed, pending enrolment with the NDIA	4	0.8%	9	1.4%
Development stalled	6	1.3%	6	0.9%
Unknown	0	0%	0	0%
Total	477	100%	641	100%

As seen in Table 12, private housing providers dominated the SDA pipeline in Western Australia, developing 76.0% of all SDA pipeline places in this state. Consistent with the findings from last year's survey, no CHPs, private disability service providers or government providers reported developing SDA in Western Australia.

Table 12 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in Western Australia

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	0	0%	0	0%
Not-for-profit Housing Provider	10	2.1%	10	1.6%
Private Housing Provider	386	80.9%	487	76.0%
Not-for-profit Disability Service Provider	10	2.1%	32	5.0%
Private Disability Service Provider	0	0%	0	0%
Government	0	0%	0	0%
Prefer not to say	33	6.9%	58	9.1%
Other	38	8.0%	54	8.4%
Total	477	100%	641	100%*

Note: 1 provider's type did not fit the listed categories and has been listed as 'other'. This provider did not provide data in the QuestionPro survey, hence why no organisation types were listed as 'other' in the QuestionPro survey sections.

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

South Australia

A total of 144 dwellings comprising 213 places were reported to be in the pipeline in South Australia, which is similar to the pipeline activity reported in last year's survey.

As seen in Figure 34, the most commonly built SDA property type in South Australia was Improved Liveability villas/duplexes/townhouses at 52 places. This was closely followed by High Physical Support apartments (36 places) and High Physical Support houses (41 places) - interestingly, the number of places in the latter property type has more than tripled since last year (from 12 places to 41 places).

A relatively large number of places (28 places) in houses were also being designed to multiple design categories. These places were predominantly a combination of High Physical Support, Fully Accessible, and Improved Liveability (26 places), while 1 dwelling was classified as High Physical Support and Robust (2 places).

Figure 34 - Estimated number of SDA places across building type and design category in South Australia ($n = 213$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	8	36	0	0	0
	Villa/Duplex/Townhouse	2	12	52	4	2
	House	0	41	7	17	28
	Group Home	4	0	0	0	0

As can be seen in Table 13, almost half (49.3%) of all the SDA pipeline places in South Australia were under construction at the time of the survey. This was followed by one-third (33.8%) of places for which the provider had secured land and was waiting for building and/or finance approval.

Table 13 - Estimated number and percentage (%) of SDA dwellings and places by development status in South Australia

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	40	27.8%	74	34.7%
Development & building approval completed & contractually committed to build	12	8.3%	24	11.3%
Under construction	87	60.4%	102	47.9%
Construction completed, pending enrolment with the NDIA	5	3.5%	13	6.1%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
TOTAL	144	100%	213	100%

As seen in Table 14 below, the majority of SDA pipeline places in South Australia were being developed by private housing providers (40.6%) and CHPs (39.3%). Notably, there has been a strong increase in the presence of private housing providers in South Australia's pipeline activity compared to last year's survey in which private housing providers comprised only 19.2% (38 places) of South Australia's pipeline.

Table 14 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in South Australia

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	58	40.3%	86	40.4%
Not-for-profit Housing Provider	33	22.9%	36	16.9%
Private Housing Provider	52	36.1%	89	41.8%
Not-for-profit Disability Service Provider	0	0%	0	0%
Private Disability Service Provider	0	0%	0	0%
Government	0	0%	0	0%
Prefer not to say	0	0%	0	0%
Other	1	0.7%	2	0.9%
Total	144	100%*	213	100%

Note: 1 provider's type did not fit the listed categories and has been listed as 'other'. This provider did not provide data in the QuestionPro survey, hence why no organisation types were listed as 'other' in the QuestionPro survey sections.

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

Tasmania

In total, 10 SDA dwellings with 15 places were in development in Tasmania, which is similar to the pipeline observed in last year's survey.

As shown in Figure 35, the most commonly built property type was High Physical Support villas/duplexes/townhouses at 9 places. This was followed by 3 places in Robust villas/duplexes/townhouses, 2 places in High Physical Support houses, and 1 place in High Physical Support apartments. No Improved Liveability properties, Fully Accessible properties, or group homes were being developed in Tasmania. Overall, this development activity is very similar to the trends observed in last year's SDA supply survey.

Figure 35 - Estimated number of SDA places across building type and design category in Tasmania ($n = 15$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	0	1	0	0	0
	Villa/Duplex/Townhouse	0	9	0	3	0
	House	0	2	0	0	0
	Group Home	0	0	0	0	0

As seen in Table 15 below, almost all (80.0%) of the pipeline places in Tasmania were in the first development phase (i.e. 'Land secured, waiting for building approval and/or finance approval'). This was followed by 13.3% of pipeline places that were in the final development stage (i.e. 'Construction completed, pending enrolment with the NDIA'). This differs markedly from last year's survey, where the majority of pipeline places were under construction.

Table 15 - Estimated number and percentage (%) of SDA dwellings and places by development status in Tasmania

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	8	80.0%	12	80.0%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Under construction	0	0%	0	0%
Construction completed, pending enrolment with the NDIA	1	10.0%	2	13.3%
Development stalled	1	10.0%	1	6.7%
Unknown	0	0%	0	0%
Total	10	100%	15	100%

The majority (73.3%) of pipeline places in Tasmania were being developed by private housing providers while only 13.3% of places were being developed by CHPs. See Table 16. This differs strongly from last year's survey, where a reversed pattern was observed, with the majority of places being developed by CHPs and only a small proportion being developed by private housing providers.

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

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	1	10.0%	2	13.3%
Not-for-profit Housing Provider	0	0%	0	0%
Private Housing Provider	8	80.0%	11	73.3%
Not-for-profit Disability Service Provider	0	0%	0	0%
Private Disability Service Provider	0	0%	0	0%
Government	0	0%	0	0%
Prefer not to say	0	0%	0	0%
Other	1	10.0%	2	13.3%
Total	10	100%	15	100%*

Note: 1 provider's type did not fit the listed categories and has been listed as 'other'. This provider did not provide data in the QuestionPro survey, hence why no organisation types were listed as 'other' in the QuestionPro survey sections.

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

Australian Capital Territory

A total of 27 SDA dwellings and 34 SDA places were in the pipeline in the Australian Capital Territory. This represents a strong increase in pipeline activity since 2022, with the number of pipeline places having almost tripled.

As can be seen in Figure 36, the pipeline in the Australian Capital Territory consisted solely of High Physical Support properties, with 20 places in apartments and 14 places in villas/duplexes/townhouses. This differs from last year's pipeline, which consisted only of High Physical Support villas/duplexes/townhouses.

Figure 36 - Estimated number of SDA places across building type and design category in the Australian Capital Territory ($n = 34$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	0	20	0	0	0
	Villa/Duplex/Townhouse	0	14	0	0	0
	House	0	0	0	0	0
	Group Home	0	0	0	0	0

As seen in Table 17 below, approximately two-thirds of all pipeline places in the Australian Capital Territory were in the first phase of the development cycle (i.e. 'Land secured, waiting for building approval and/or finance approval'). The remaining one-third (35.3%) of places were reported to be under construction. This differs from last year's survey, in which all pipeline places were still at the first stage of the development cycle.

Table 17 - Estimated number and percentage (%) of SDA dwellings and places by development status in the Australian Capital Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	16	59.3%	22	64.7%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Under construction	11	40.7%	12	35.3%
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
Total	27	100%	34	100%

The SDA pipeline in the Australian Capital Territory was being developed by private housing providers (developing 58.8% of pipeline places) and CHPs (developing 41.2% of pipeline places). In contrast, the pipeline in last year's SDA supply survey was developed solely by CHPs. See Table 18 below.

Table 18 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in the Australian Capital Territory

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	7	25.9%	14	41.2%
Not-for-profit housing Provider	0	0%	0	0%
Private Housing Provider	20	74.1%	20	58.8%
Not-for-profit Disability Service Provider	0	0%	0	0%
Private Disability Service Provider	0	0%	0	0%
Government	0	0%	0	0%
Prefer not to say	0	0%	0	0%
Other	0	0%	0	0%
Total	27	100%	34	100%

Northern Territory

A total of 13 dwellings and 20 places were in the Northern Territory's pipeline, which is similar to the pipeline activity reported in last year's SDA supply survey.

As shown in Figure 37, the SDA pipeline in the Northern Territory consisted of 12 places in High Physical Support villas/duplexes/townhouses, followed by 6 places in Robust villas/duplexes/townhouses and 2 places in Robust houses. In contrast to last year's pipeline, no Fully Accessible dwellings were reported to be in development in the Northern Territory this year.

Figure 37 - Estimated number of SDA places across building type and design category in the Northern Territory ($n = 20$)

		Design category				
		Fully Accessible	High Physical Support	Improved Liveability	Robust	Multi-Design Category
Building type	Apartment	0	0	0	0	0
	Villa/Duplex/Townhouse	0	12	0	6	0
	House	0	0	0	2	0
	Group Home	0	0	0	0	0

As seen in Table 19 below, the pipeline places in the Northern Territory were either under construction (60.0% of places) or in the first development phase of 'Land secured, waiting for building approval and/or finance approval' (40.0% of places).

Table 19 - Estimated number and percentage (%) of SDA dwellings and places by development status in the Northern Territory

Development status	Number of dwellings	% of dwellings	Number of places	% of places
Land secured, waiting for building approval and/or finance approval	7	53.9%	8	40.0%
Development & building approval completed & contractually committed to build	0	0%	0	0%
Under construction	6	46.2%	12	60.0%
Construction completed, pending enrolment with the NDIA	0	0%	0	0%
Development stalled	0	0%	0	0%
Unknown	0	0%	0	0%
TOTAL	13	100%*	20	100%

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

All of the pipeline places were being developed by private housing providers - see Table 20 below.

Table 20 - Estimated number and percentage (%) of SDA dwellings and places by organisation type in the Northern Territory

Organisation type	Number of dwellings	% of dwellings	Number of places	% of places
Community Housing Provider (CHP)	0	0%	0	0%
Not-for-profit Housing Provider	0	0%	0	0%
Private Housing Provider	13	100%	20	100%
Not-for-profit Disability Service Provider	0	0%	0	0%
Private Disability Service Provider	0	0%	0	0%
Government	0	0%	0	0%
Prefer not to say	0	0%	0	0%
Other	0	0%	0	0%
Total	13	100%	20	100%

SA4 regions and NDIA data

The number of SDA dwellings and places in the pipeline have been organised into Statistical Area Level 4 (SA4) regions to provide a detailed overview of the SDA supply across Australia.⁵⁶ This pipeline data has also been combined with the NDIA's reported data on enrolled and in-kind dwellings across SA4 regions as of 30 June 2023.⁵⁷ In-kind dwellings (which are only present in Tasmania) are SDA properties that are owned by the state's government and tenanted by NDIS participants.

Of the 87 SA4 regions in Australia, 76 have SDA dwellings in development, according to the data in this survey. It is important to note that the number of enrolled places shown in the below sections are only estimates, as the *NDIA Quarterly Report* does not specify the exact number of places for Legacy dwellings (which are reported as having '6+' places).⁵⁸ For consistency, the following analyses treated these as though they had exactly 6 places, though they could provide more places. As such, the number of enrolled places presented is the minimum number of places. As the number could be larger for each Legacy dwelling, the results need to be interpreted with caution.

NDIA notification status

As of 1 July 2021, it is mandatory for present and future SDA providers to notify the NDIA of any planned SDA dwellings once they reach the design stage. According to the June quarterly report, there are 3,544 unenrolled dwellings.⁵⁹

Given this report and the NDIA's *Quarterly Report* both measure unenrolled SDA dwellings, the potential overlap between the 2 reports was assessed by asking providers whether the NDIA had been notified about each of their pipeline dwellings. Most dwellings (941; 62.4%) had been reported to the NDIA, while 395 dwellings (26.2%) had not been reported to the NDIA. For the rest of the dwellings, providers were unsure whether the NDIA had been notified about them or not (173 dwellings; 11.5%). Refer Figure 38.

The next sections of this report present the enrolled and pipeline SDA dwellings across SA4 regions in each jurisdiction, however, to avoid duplication the unenrolled

⁵⁶ See Australian Bureau of Statistics (ABS, 2016) for more information on Statistical Area Level 4 (SA4)

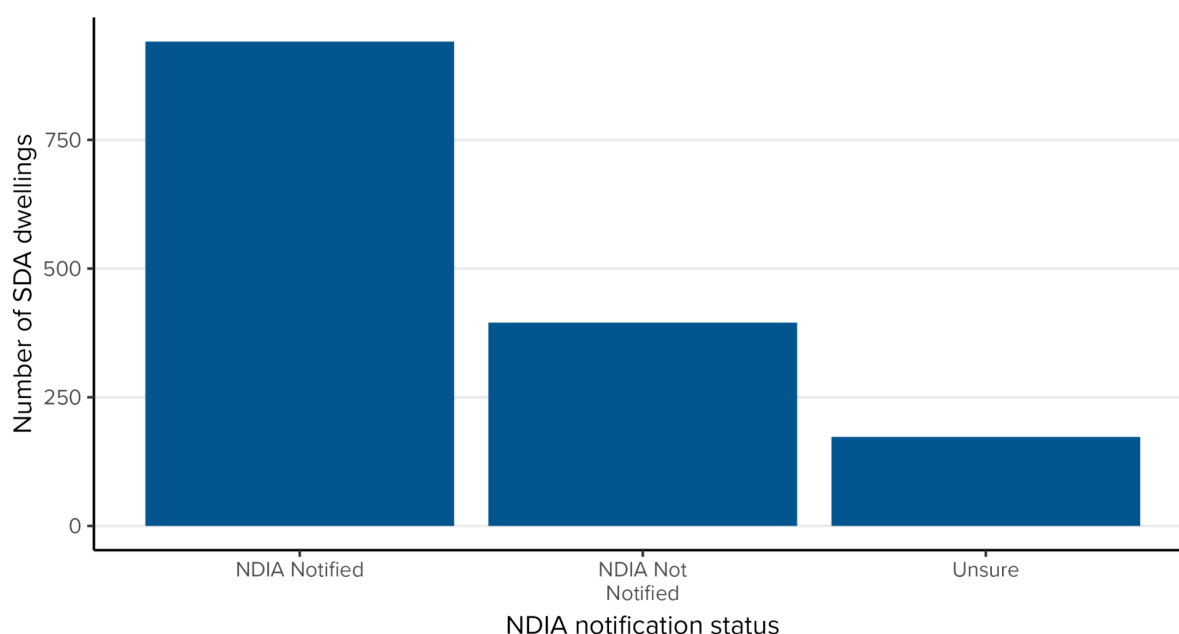
⁵⁷ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Downloaded 10 October 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

⁵⁸ This only applies to enrolled dwellings in New South Wales, Victoria, Queensland, Western Australia, South Australia, and Tasmania. No enrolled dwellings in the Australian Capital Territory and Northern Territory, and none of the enrolled in-kind dwellings in Tasmania were reported as having 6+ places.

⁵⁹ NDIA (2023). *NDIS quarterly report to disability ministers: Q4 2022-2023*. National Disability Insurance Agency. Table P10. Downloaded 10 October 2023. <https://www.ndis.gov.au/about-us/publications/quarterly-reports>

dwellings from the NDIA's *Quarterly Report* will not be included. Thus, these sections will present the reported pipeline dwellings from this current survey, as well as the enrolled dwellings from the NDIA's report.

Figure 38 - NDIA notification status ($n = 1,509$)



Note: A total of 34 dwellings did not have any response for NDIA Notification Status, and were removed from this analysis.

New South Wales

For New South Wales, the number of SDA dwellings and places across the state's SA4 regions is shown in Table 21, as well as in Figure 39 (number of dwellings) and Figure 40 (number of places). The geographic location of SDA pipeline places in New South Wales is shown in Figure 41.

'Sydney - Parramatta' was the SA4 region with the highest number of pipeline dwellings (61), followed by 'Central Coast' (34 dwellings), 'Newcastle and Lake Macquarie' (32 dwellings), and 'Coffs Harbour - Grafton' (30 dwellings). 'Capital Region', 'Hunter Valley exc Newcastle', 'Riverina', 'Sydney - Eastern Suburbs', and 'Sydney - Inner West' did not have any pipeline dwellings in development.

In terms of total SDA dwellings (enrolled and pipeline), 'Sydney - Parramatta' had the most (292 dwellings), followed by 'Sydney - Outer West and Blue Mountains' (252 dwellings), and 'Newcastle and Lake Macquarie' (225 dwellings). As was the case last year, 'Sydney - Parramatta', though having more dwellings, had fewer places (566) than 'Sydney - Outer West and Blue Mountains' (623). This indicates the dwellings in 'Sydney - Outer West and Blue Mountains' tend to house more tenants than dwellings in 'Sydney - Parramatta'. Interestingly, the NDIA predicts that 'Sydney - Parramatta' will

be 1 of 10 SA4 regions that will account for one-third of SDA demand over the next 2 decades.⁶⁰ Specifically, it is estimated that by 2042, a total of 786 participants will be seeking SDA in that region (2.1% of total SDA demand). Another SA4 region in which SDA demand is expected to be high is 'Sydney - South West (i.e., 650 participants seeking SDA by 2042). There are currently 313 total SDA places (pipeline and enrolled) reported by providers involved in this survey in that region.

⁶⁰ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23: Demand projections*. National Disability Insurance Agency. Downloaded 31 October 2023.
<https://www.ndis.gov.au/media/6289/download?attachment>

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

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Capital Region	74	0	74	189	0	189
Central Coast	131	34	165	386	44	430
Central West	69	15	84	266	19	285
Coffs Harbour - Grafton	31	30	61	110	34	144
Far West and Orana	78	6	84	200	6	206
Hunter Valley exc Newcastle	62	0	62	207	0	207
Illawarra	106	4	110	278	12	290
Mid North Coast	59	19	78	164	38	202
Murray	85	2	87	204	4	208
New England and North West	43	12	55	166	15	181
Newcastle and Lake Macquarie	193	32	225	492	57	549
Richmond - Tweed	65	9	74	191	14	205
Riverina	45	0	45	141	0	141
Southern Highlands and Shoalhaven	40	8	48	124	20	144
Sydney - Baulkham Hills and Hawkesbury	70	22	92	278	22	300
Sydney - Blacktown	121	1	122	403	2	405
Sydney - City and Inner South	41	5	46	118	9	127

Sydney - Eastern Suburbs	17	0	17	66	0	66
Sydney - Inner South West	136	22	158	397	26	423
Sydney - Inner West	35	0	35	103	0	103
Sydney - North Sydney and Hornsby	80	7	87	207	9	216
Sydney - Northern Beaches	65	11	76	236	18	254
Sydney - Outer South West	65	8	73	191	10	201
Sydney - Outer West and Blue Mountains	232	20	252	572	51	623
Sydney - Parramatta	231	61	292	472	94	566
Sydney - Ryde	135	1	136	337	4	341
Sydney - South West	139	5	144	308	5	313
Sydney - Sutherland	100	9	109	277	13	290
Total	2548	343	2891	7083	526	7609

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

Figure 39 - Estimated SDA dwellings in New South Wales (NSW)

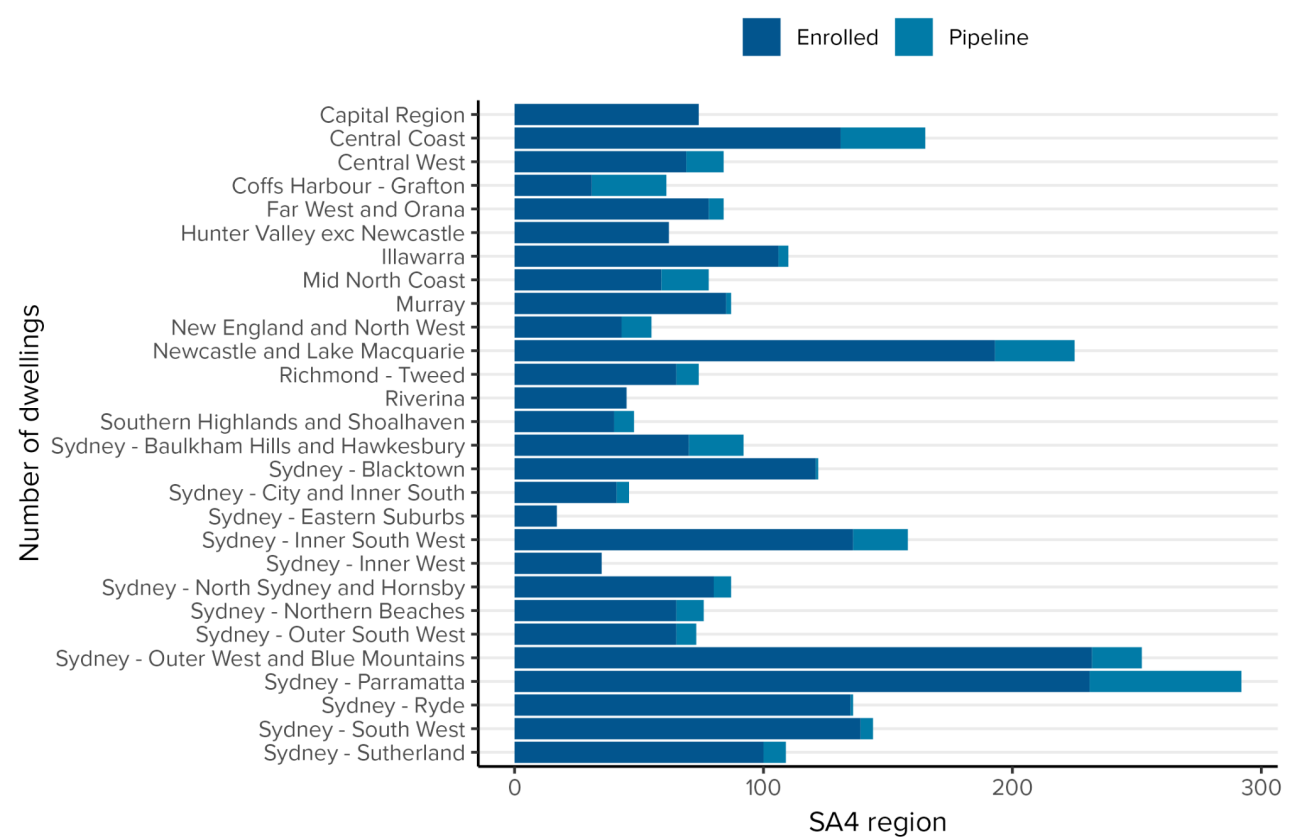
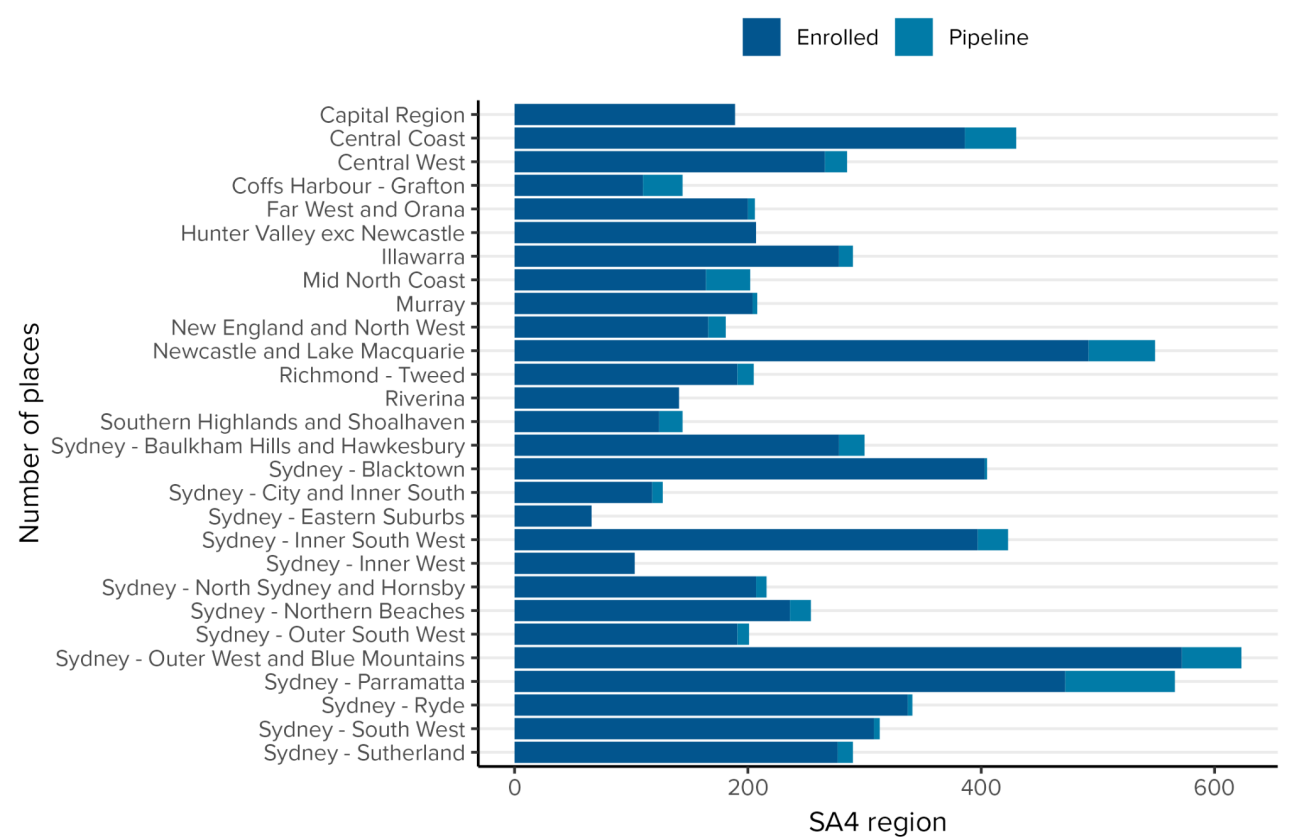
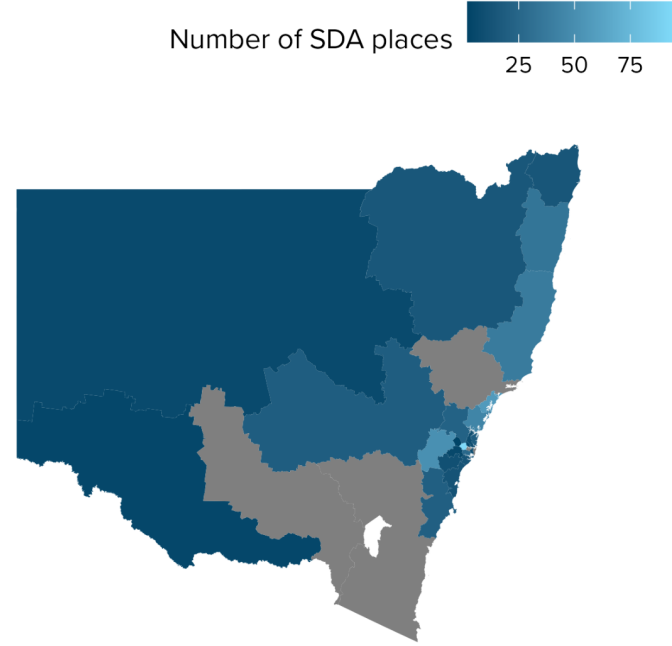


Figure 40 - Estimated SDA places in New South Wales (NSW)



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

Figure 41 - SDA places in the pipeline in New South Wales (NSW)



Victoria

For Victoria, the number of SDA dwellings and places across the state's SA4 regions is shown in Table 22, as well as in Figure 42 (number of dwellings) and Figure 43 (number of places). The geographic location of SDA pipeline places in Victoria is shown in Figure 44.

'Melbourne - West' was the SA4 region with the highest number of pipeline dwellings (63), followed by 'Melbourne - North East' (38 dwellings), and 'Melbourne - Inner' (31 dwellings). 'Hume' and 'North West' did not have any pipeline dwellings in development.

In terms of total SDA dwellings (enrolled and pipeline), 'Melbourne - West' had the most (310 dwellings), followed by 'Melbourne - North East' (249 dwellings), and 'Melbourne - South East' (222 dwellings). These SA4 regions align with the NDIA's SDA demand projections for Victoria.⁶¹ Along with 'Melbourne - Inner' and 'Melbourne - North West', 'Melbourne - West', 'Melbourne - North East' and 'Melbourne - South East' are 5 of 10 SA4 regions that will account for one-third of all growth in SDA demand by 2042. In fact, the NDIA estimates that by 2042, a total of 5,384 participants will be seeking SDA in these regions (14.7% of total SDA demand).

⁶¹ NDIA (2023). *Specialist Disability Accommodation Pricing Review 2022-23: Demand projections*. National Disability Insurance Agency. Downloaded 31 October 2023.
<https://www.ndis.gov.au/media/6289/download?attachment>

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

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Ballarat	132	27	159	297	41	338
Bendigo	62	15	77	160	25	185
Geelong	132	24	156	323	36	359
Hume	55	0	55	175	0	175
Latrobe - Gippsland	81	15	96	245	35	280
Melbourne - Inner	166	31	197	299	32	331
Melbourne - Inner East	112	15	127	441	18	459
Melbourne - Inner South	170	23	193	522	30	552
Melbourne - North East	211	38	249	719	69	788
Melbourne - North West	64	4	68	249	4	253
Melbourne - Outer East	185	3	188	646	4	650
Melbourne - South East	198	24	222	630	40	670
Melbourne - West	247	63	310	665	77	742
Mornington Peninsula	92	2	94	315	5	320
North West	97	0	97	330	0	330
Shepparton	42	16	58	147	25	172

Warrnambool and South West	56	13	69	211	26	237
Total	2102	313	2415	6374	467	6841

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

Figure 42 - Estimated SDA dwellings in Victoria (VIC)

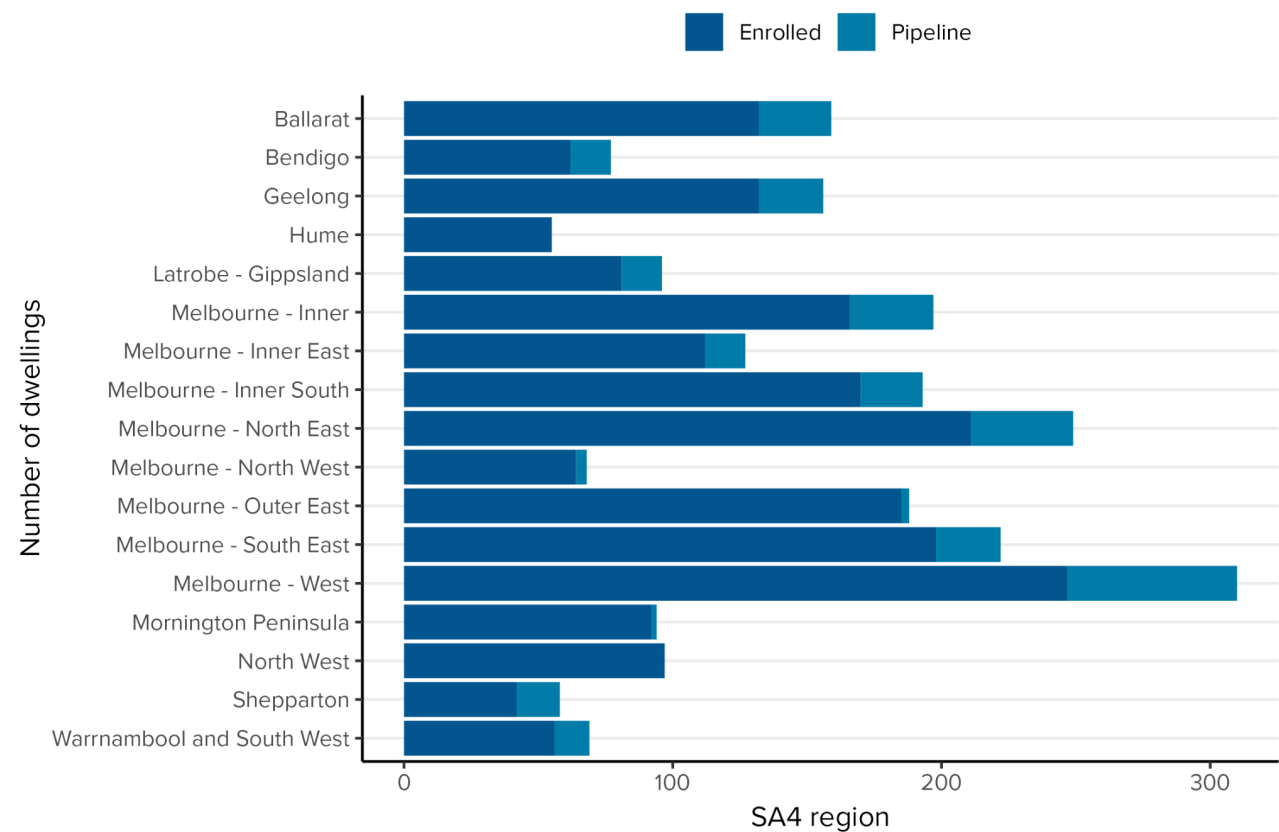
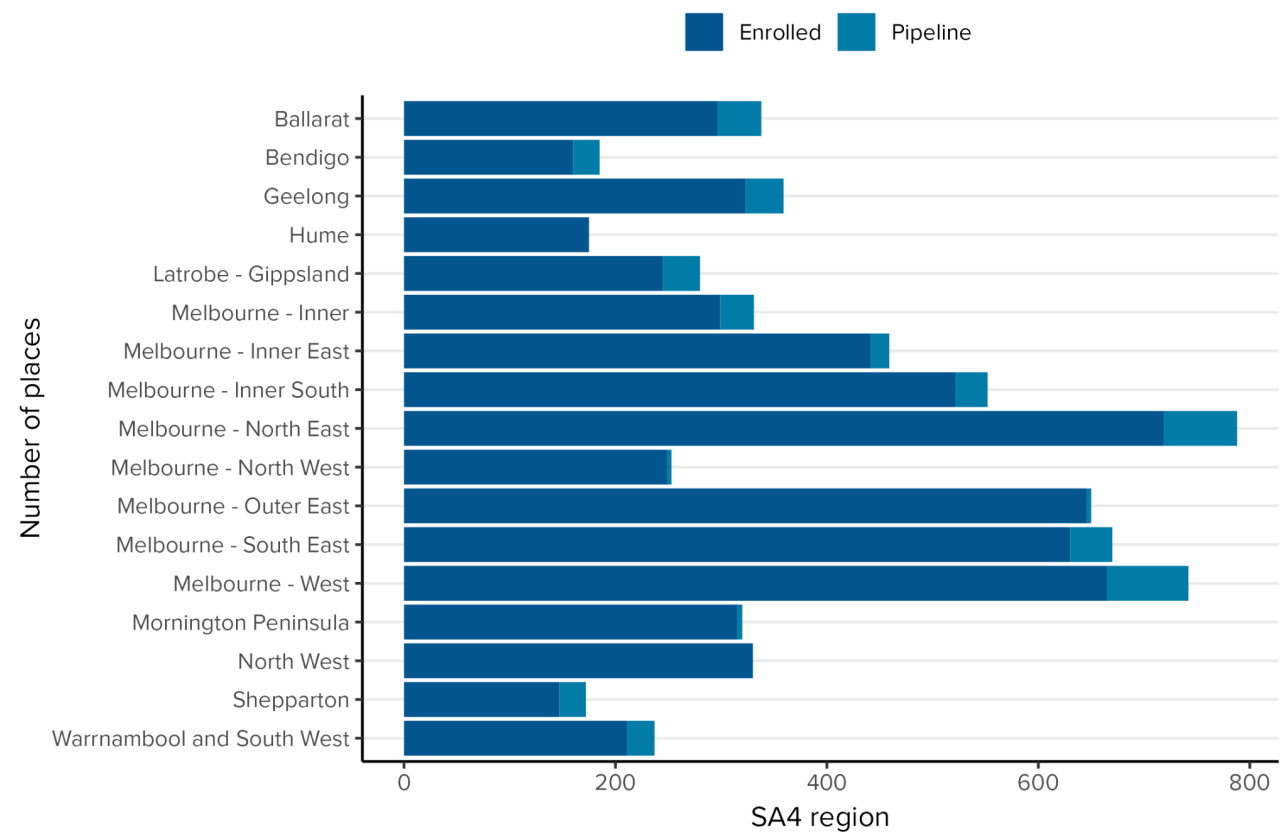
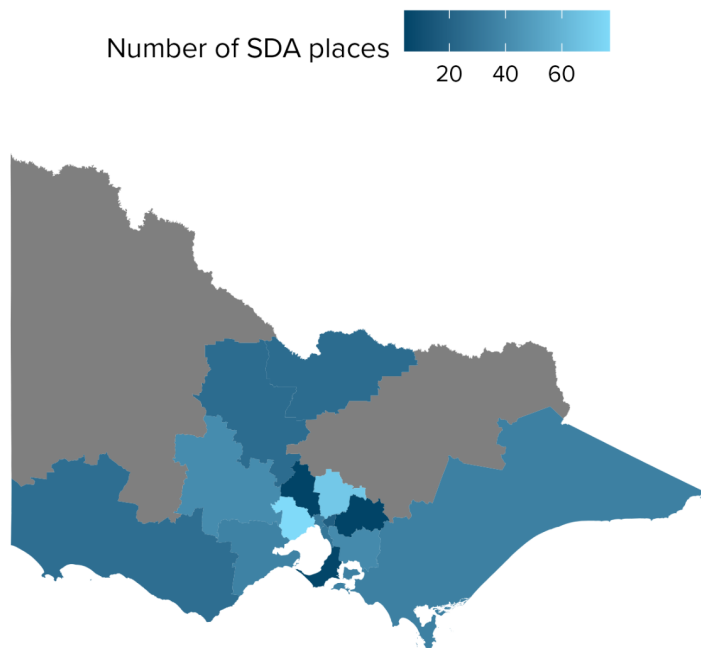


Figure 43 - Estimated SDA places in Victoria (VIC)



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

Figure 44 - SDA places in the pipeline in Victoria (VIC)



Queensland

For Queensland, the number of SDA dwellings and places across the state's SA4 regions is shown in Table 23, as well as in Figure 45 (number of dwellings) and Figure 46 (number of places). The geographic location of SDA pipeline places in Queensland is shown in Figure 47.

'Townsville' was the SA4 region with the highest number of pipeline dwellings (41), followed by 'Brisbane - East' (26 dwellings). 'Darling Downs - Maranoa' and 'Queensland - Outback' did not have any pipeline dwellings in development. As highlighted in last year's report, 'Queensland - Outback' still has no enrolled or pipeline dwellings.

In terms of total SDA dwellings (enrolled and pipeline), 'Gold Coast' had the most (209 dwellings), followed by 'Ipswich' (194 dwellings), and 'Logan - Beaudesert' (192 dwellings).

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

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Brisbane - East	46	26	72	84	42	126
Brisbane - North	59	19	78	114	34	148
Brisbane - South	57	19	76	109	33	142
Brisbane - West	55	4	59	103	9	112
Brisbane Inner City	58	8	66	74	10	84
Cairns	66	3	69	133	3	136
Darling Downs - Maranoa	42	1	43	105	3	108
Fitzroy	11	0	11	31	0	31
Gold Coast	197	12	209	301	15	316
Ipswich	186	8	194	391	24	415
Logan - Beaudesert	174	18	192	351	38	389
Mackay	15	2	17	49	5	54
Moreton Bay - North	141	10	151	329	12	341
Moreton Bay - South	55	4	59	119	9	128
Queensland - Outback	0	0	0	0	0	0
Sunshine Coast	87	16	103	166	28	194
Toowoomba	67	10	77	167	20	187
Townsville	62	41	103	168	66	234

Wide Bay	137	15	152	306	20	326
Total	1515	216	1731	3100	371	3471

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

Figure 45 - Estimated SDA dwellings in Queensland (QLD)

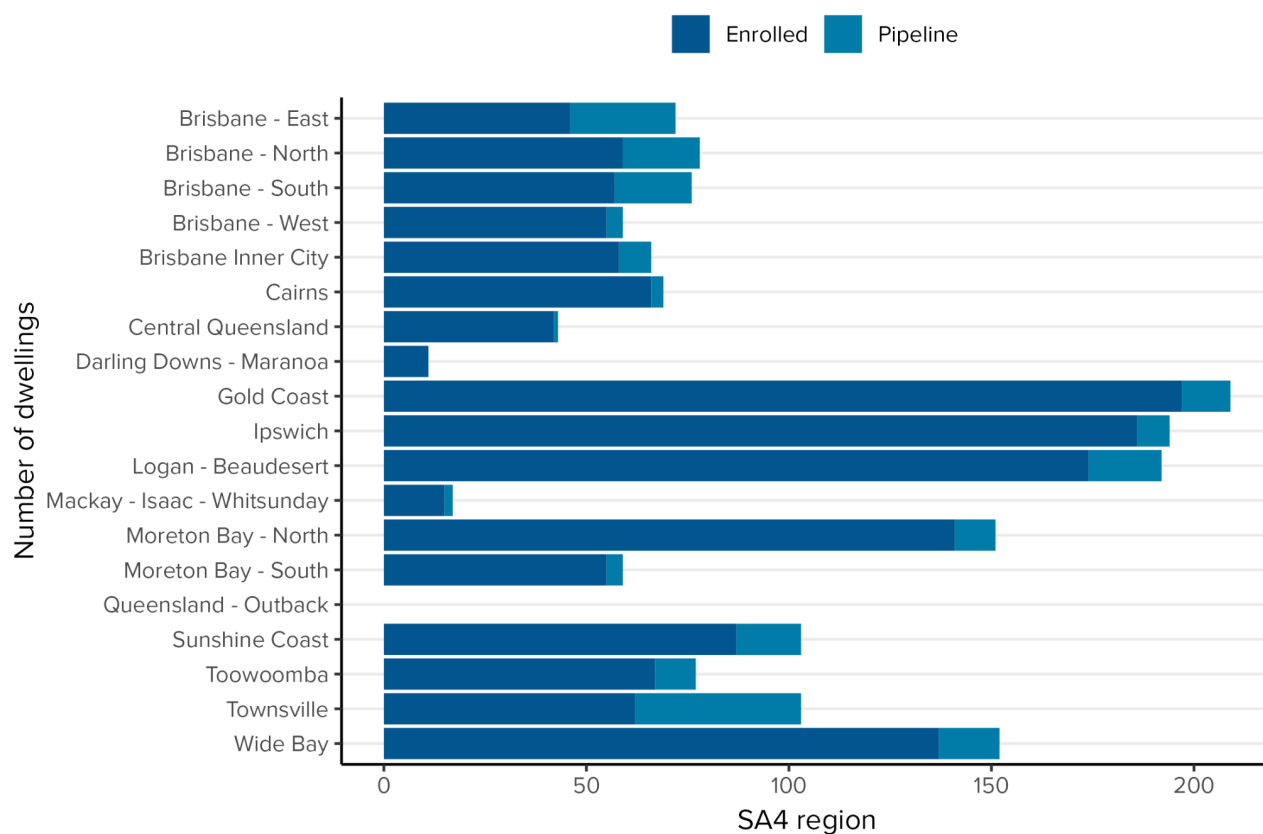
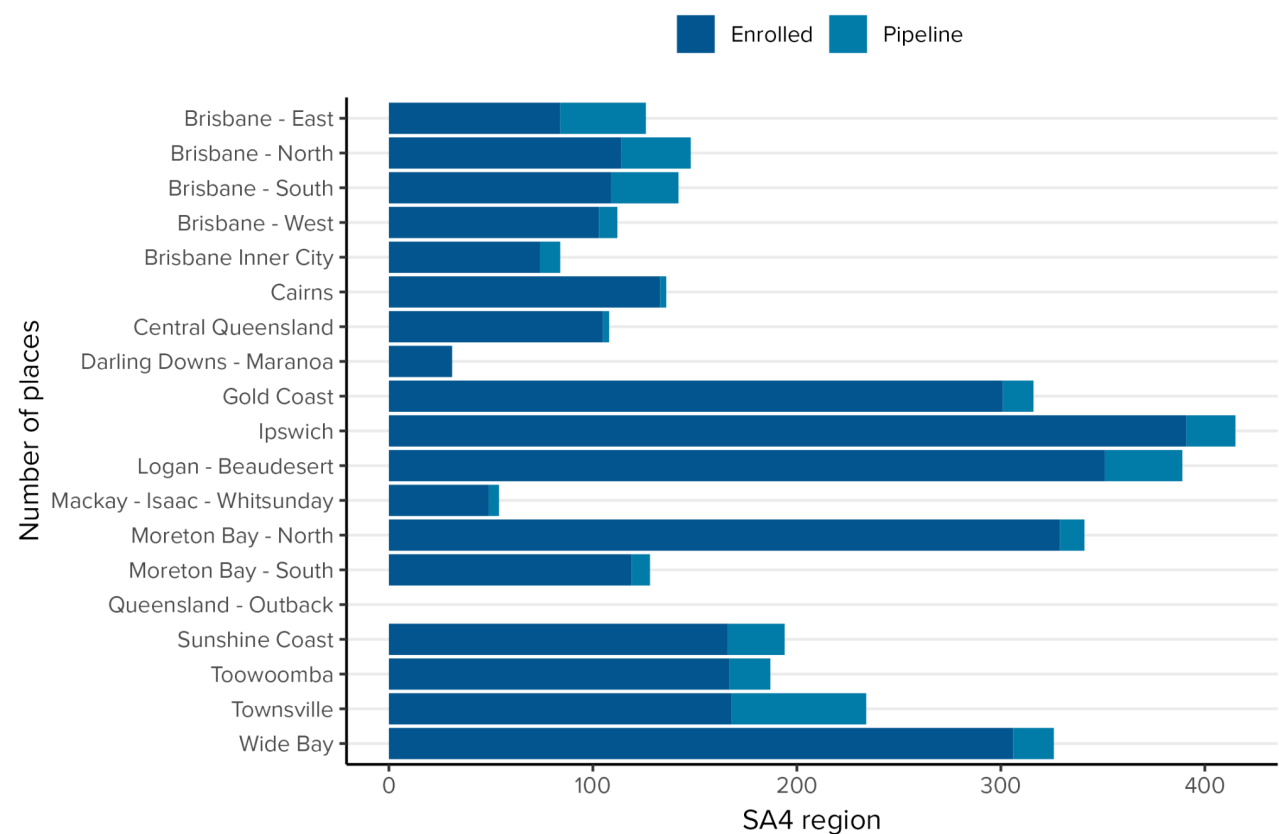
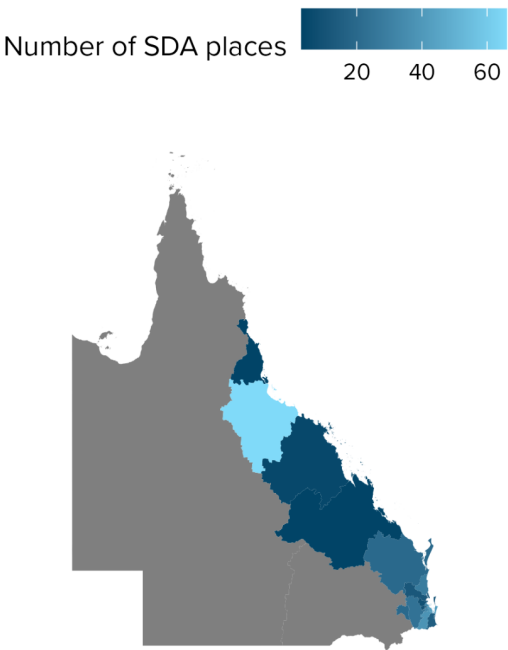


Figure 46 - Estimated SDA places in Queensland (QLD)



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

Figure 47 - SDA places in the pipeline in Queensland (QLD)



Western Australia

For Western Australia, the number of SDA dwellings and places across the state's SA4 regions is shown in Table 24, as well as in Figure 48 (number of dwellings) and Figure 49 (number of places). The geographic location of SDA pipeline places in Western Australia is shown in Figure 50.

'Perth - South East' was the SA4 region with the highest number of pipeline dwellings (131), followed by 'Perth - South West' (103 dwellings), 'Mandurah' (82 dwellings), and 'Perth - North East' (79 dwellings). Only 'Western Australia - Outback (North)' did not have any pipeline dwellings in development, and neither did it have any enrolled dwellings.

In terms of total SDA dwellings (enrolled and pipeline), 'Perth - South East' had the most (198 dwellings), followed by 'Perth - South East' (143 dwellings), 'Mandurah' (93 dwellings), and 'Perth - North East' (89 dwellings).

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

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Bunbury	5	17	22	12	23	35
Mandurah	11	82	93	32	103	135
Perth - Inner	16	24	40	21	26	47
Perth - North East	10	79	89	34	97	131
Perth - North West	38	32	70	69	69	138
Perth - South East	67	131	198	115	193	308
Perth - South West	40	103	143	65	118	183
Western Australia - Outback (North)	0	0	0	0	0	0
Western Australia - Outback (South)	6	3	9	14	3	17
Western Australia - Wheat Belt	0	6	6	0	9	9
Total	193	477	670	362	641	1003

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

Figure 48 - Estimated SDA dwellings in Western Australia (WA)

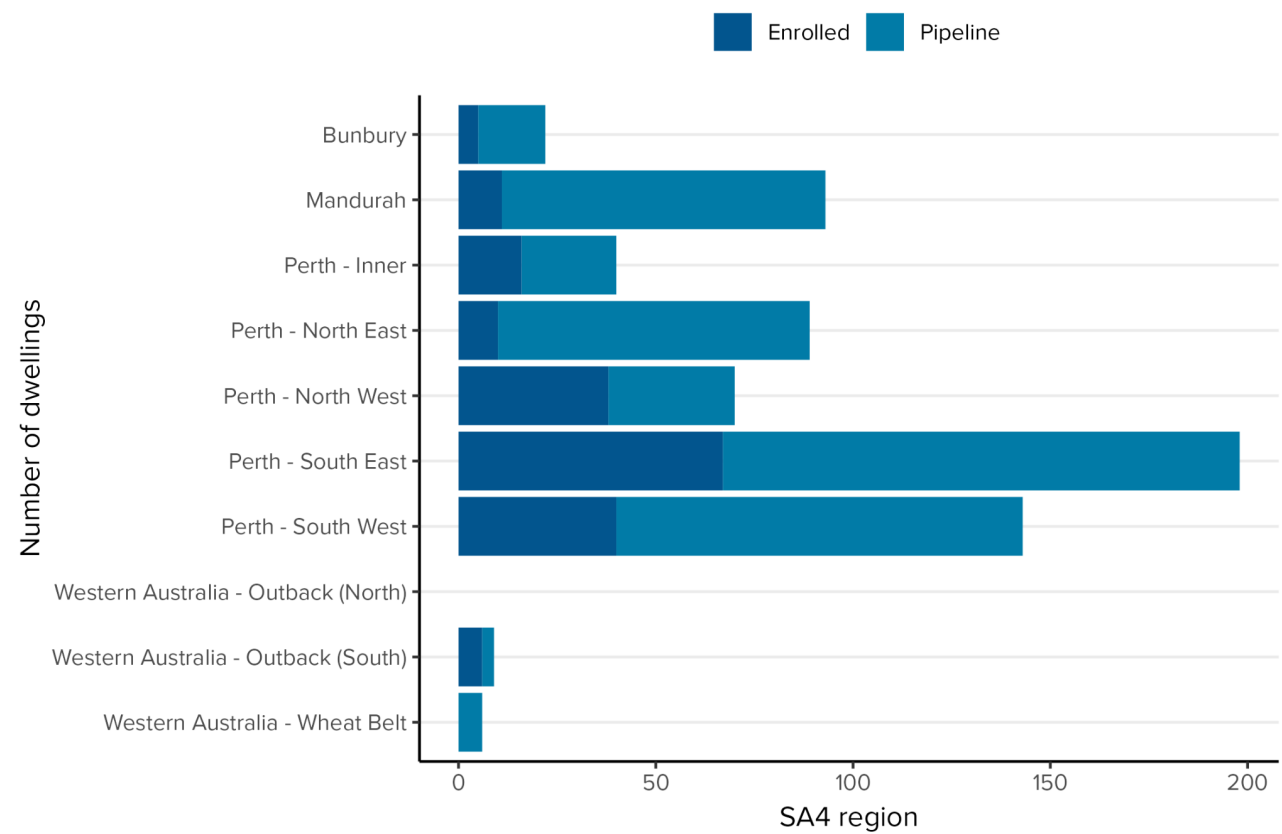
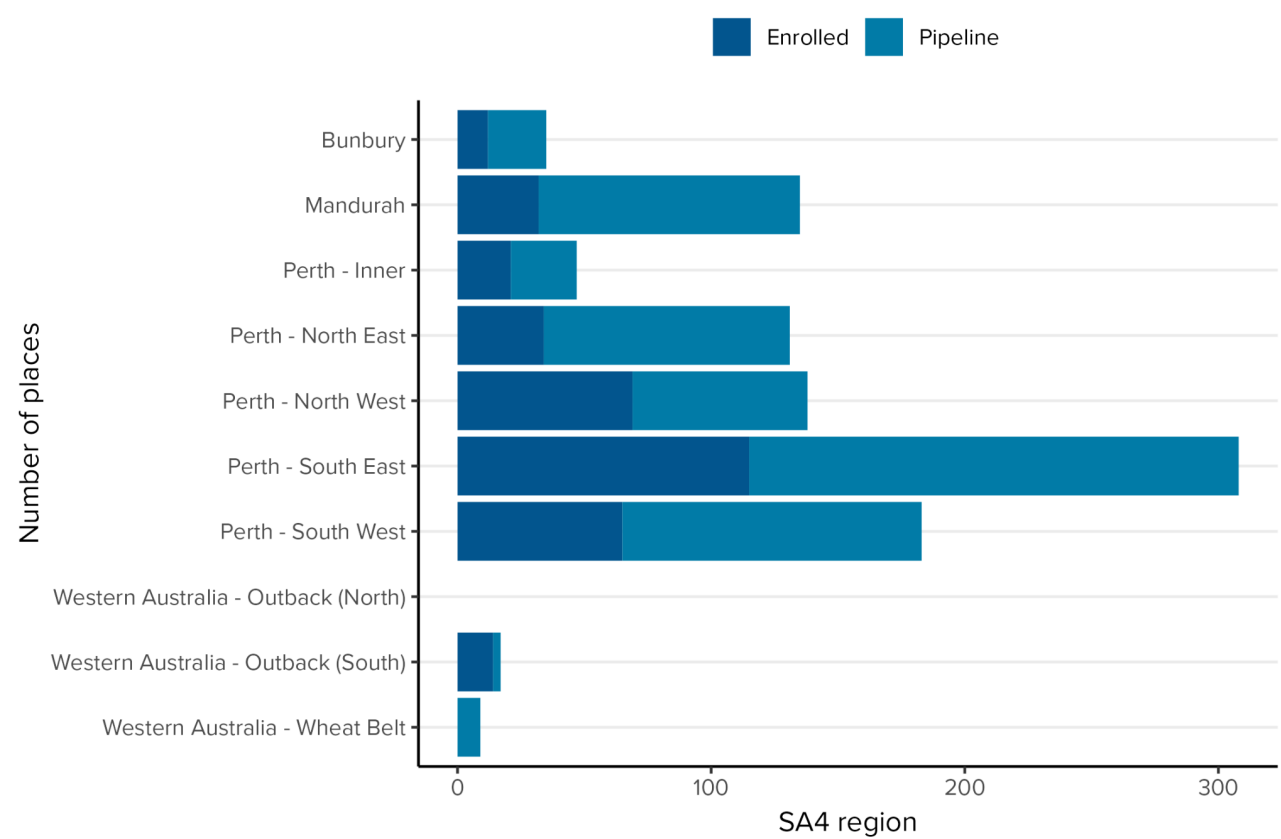
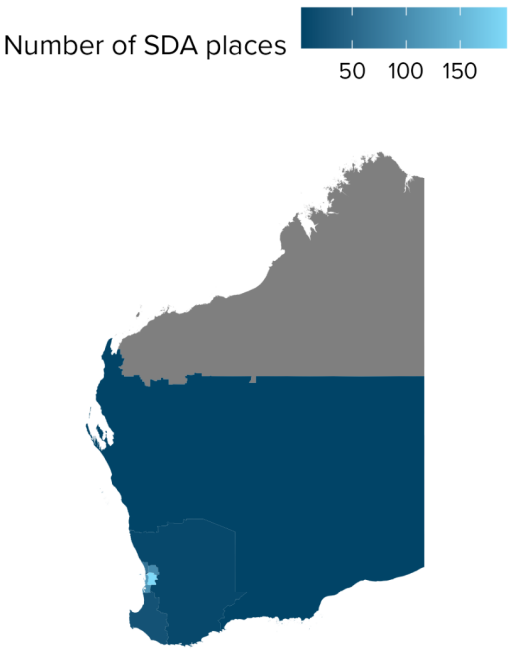


Figure 49 - Estimated SDA places in Western Australia (WA)



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

Figure 50 - SDA places in the pipeline in Western Australia (WA)



South Australia

For South Australia, the number of SDA dwellings and places across the state's SA4 regions is shown in Table 25, as well as in Figure 51 (number of dwellings) and Figure 52 (number of places). The geographic location of SDA pipeline places in South Australia is shown in Figure 53.

'Adelaide - North' was the SA4 region with the highest number of pipeline dwellings (46), followed by 'Adelaide - South' (40 dwellings), and 'Adelaide - Central and Hills' (33 dwellings). Only 'Barossa - Yorke - Mid North' did not have any pipeline dwellings in development.

In terms of total SDA dwellings (enrolled and pipeline), 'Adelaide - North' had the most (474 dwellings), followed by 'Adelaide - South' (383 dwellings), 'Adelaide - West' (238 dwellings), and 'Adelaide - Central and Hills' (203 dwellings).

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

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Adelaide - Central and Hills	170	33	203	333	4337	370
Adelaide - North	428	46	474	1010	77	1087
Adelaide - South	343	40	383	775	54	829
Adelaide - West	216	22	238	448	41	489
Barossa - Yorke - Mid North	11	0	11	33	0	33
South Australia - Outback	17	1	18	40	1	41
South Australia - South East	106	2	108	248	3	251
Total	1291	144	1435	2887	213	3100

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

Figure 51 - Estimated SDA dwellings in South Australia (SA)

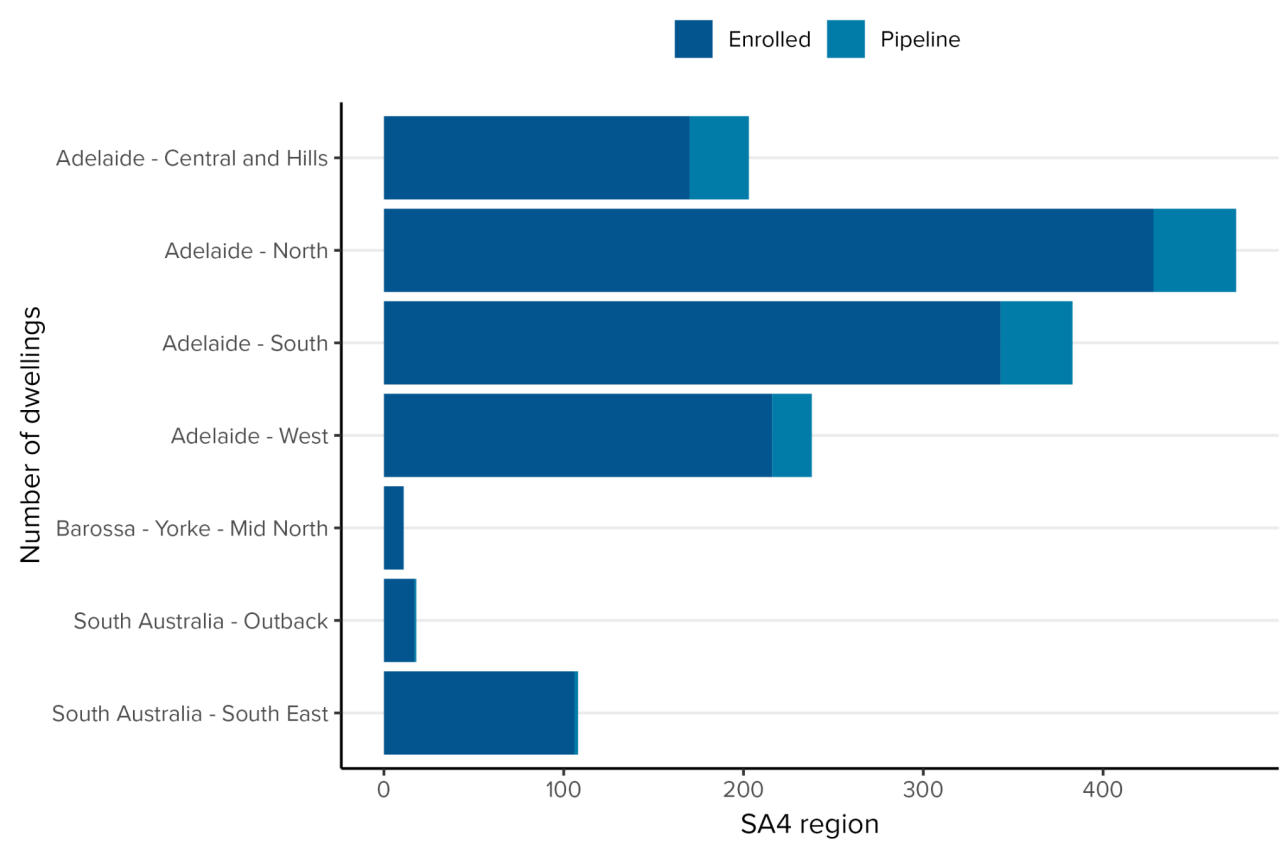
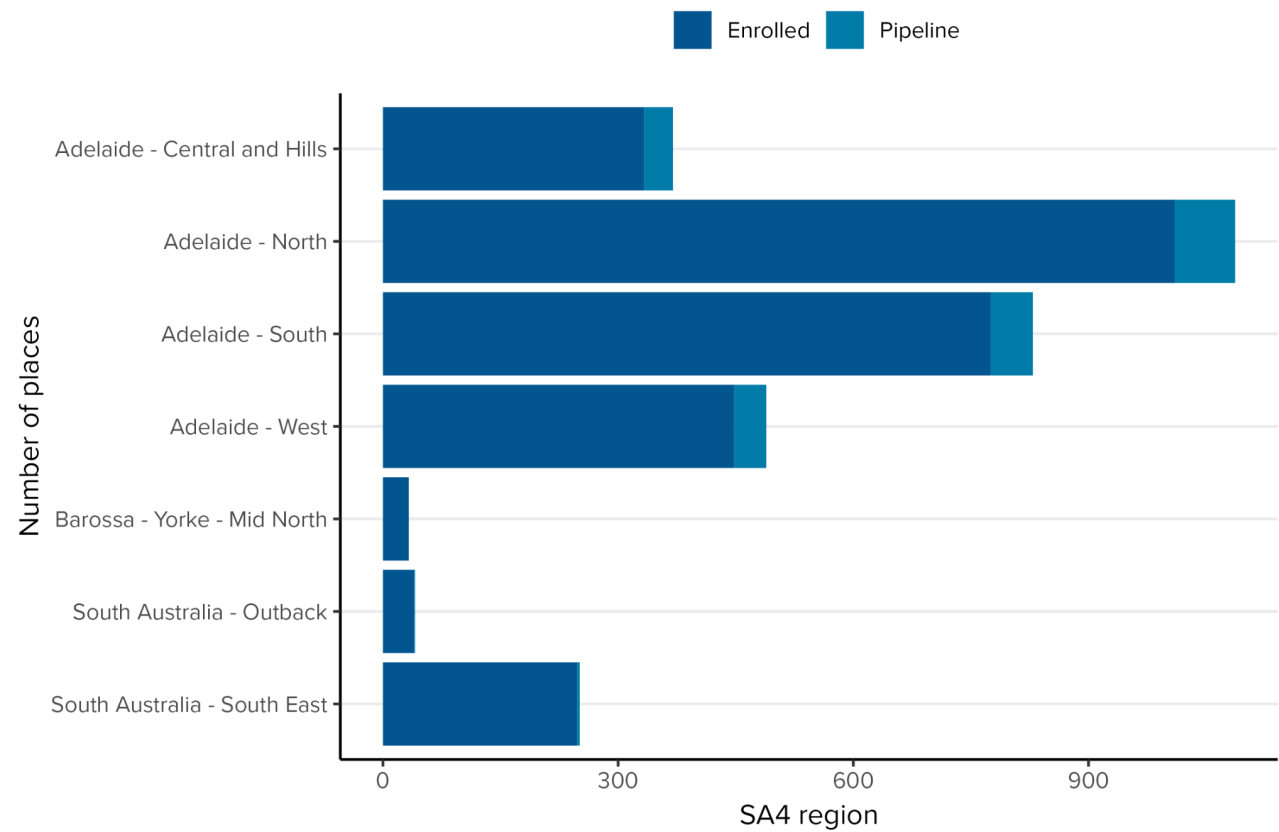
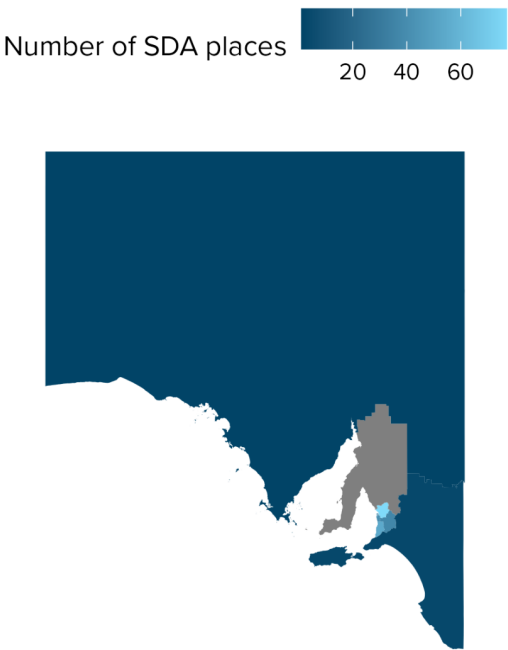


Figure 52 - Estimated SDA places in South Australia (SA)



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

Figure 53 - SDA places in the pipeline in South Australia (SA)



Tasmania

For Tasmania, the number of SDA dwellings and places across the state's SA4 regions is shown in Table 26, as well as in Figure 54 (number of dwellings) and Figure 55 (number of places). The geographic location of SDA pipeline places in Tasmania is shown in Figure 56.

'West and North West' was the SA4 region with the highest number of pipeline dwellings (8), followed by 'Hobart' (1 dwelling), and 'Launceston and North East' (1 dwelling). 'South East' did not have any pipeline dwellings in development.

Tasmania is the only jurisdiction with in-kind dwellings, which make up the bulk of their SDA dwellings. In terms of total SDA dwellings (enrolled, in-kind, and pipeline), 'Hobart' had the most (124 dwellings), followed by 'West and North West' (93 dwellings), 'Launceston and North East' (53 dwellings), and 'South East' (2 dwellings).

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

SA4 Region	Number of dwellings				Number of places			
	Enrolled	In-kind	Pipeline	Total	Enrolled	In-kind	Pipeline	Total
Hobart	12	111	1	124	25	299	2	326
Launceston and North East	19	33	1	53	57	108	1	166
South East	0	2	0	2	0	9	0	9
West and North West	28	57	8	93	50	122	12	184
Total	59	203	10	272	132	538	15	685

Figure 54 - Estimated SDA dwellings in Tasmania (TAS)

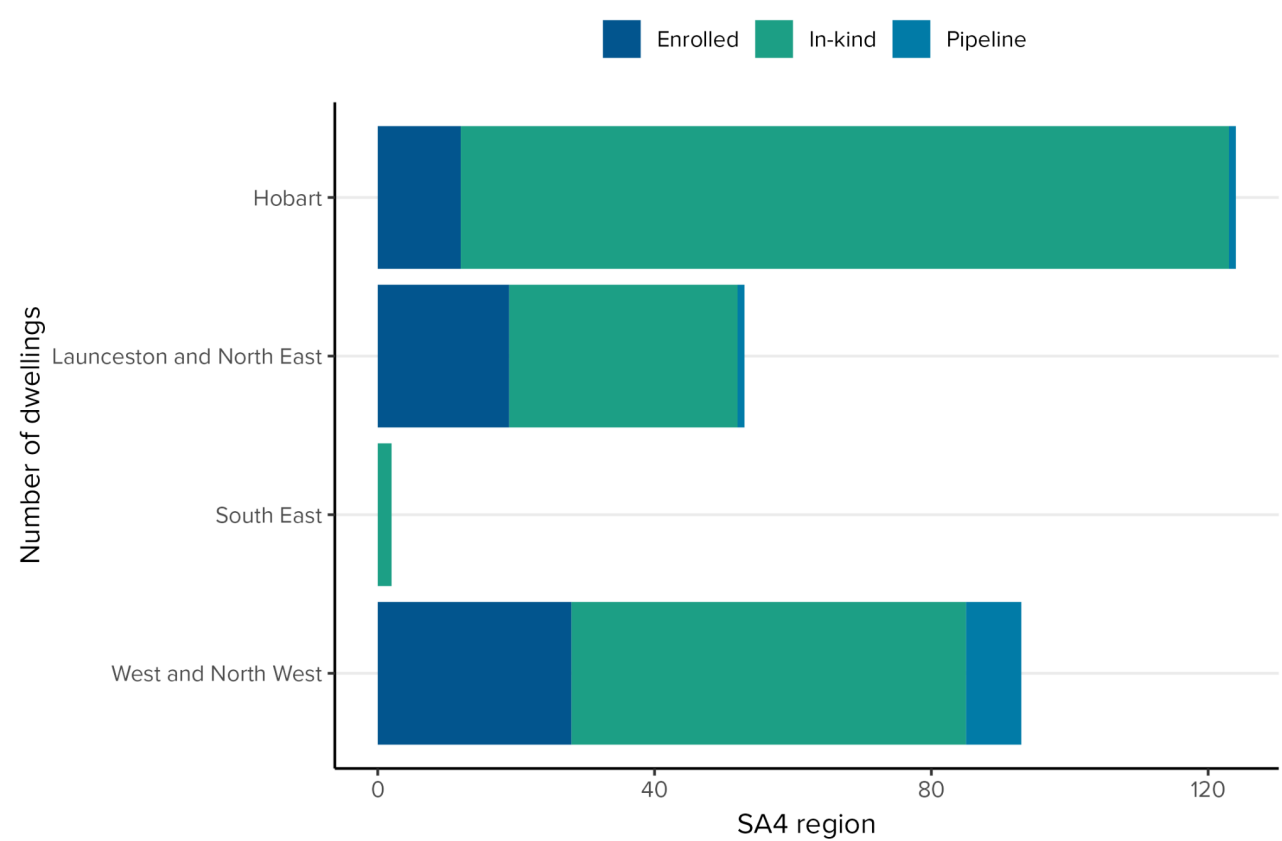
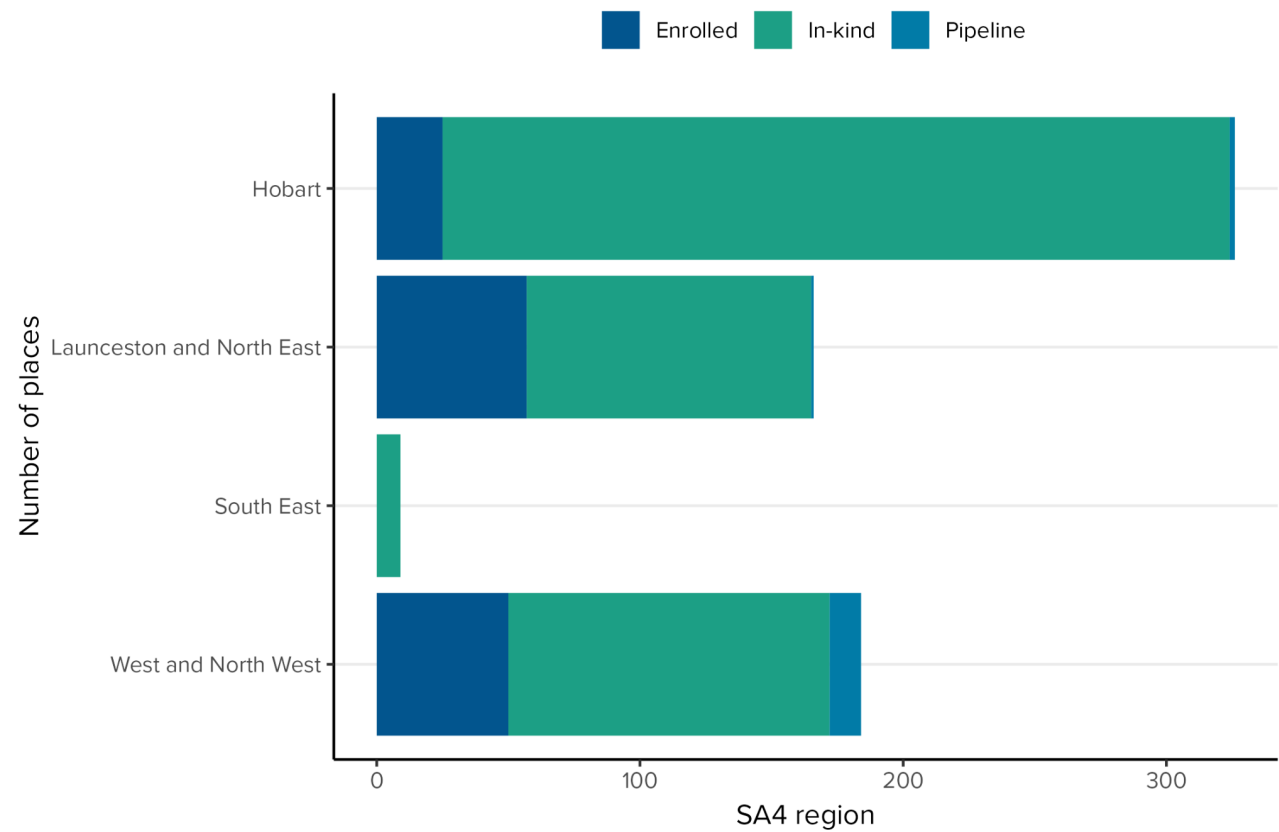
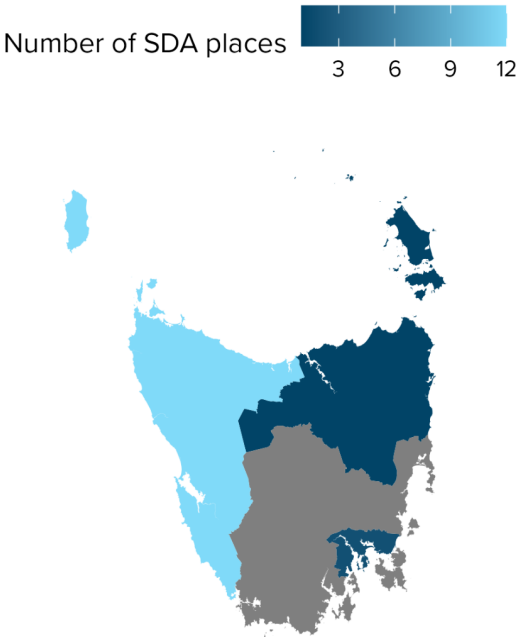


Figure 55 - Estimated SDA places in Tasmania (TAS)



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

Figure 56 - SDA places in the pipeline in Tasmania (TAS)



Australian Capital Territory

For the Australian Capital Territory, there is only 1 SA4 region. The SDA dwellings and places are shown in Table 27, as well as in Figure 57 (number of dwellings) and Figure 58 (number of places). There were 6 pipeline dwellings in development and 171 total dwellings (enrolled and pipeline combined).

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

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Australian Capital Territory	175	27	202	404	34	438
Total	175	27	202	404	34	438

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

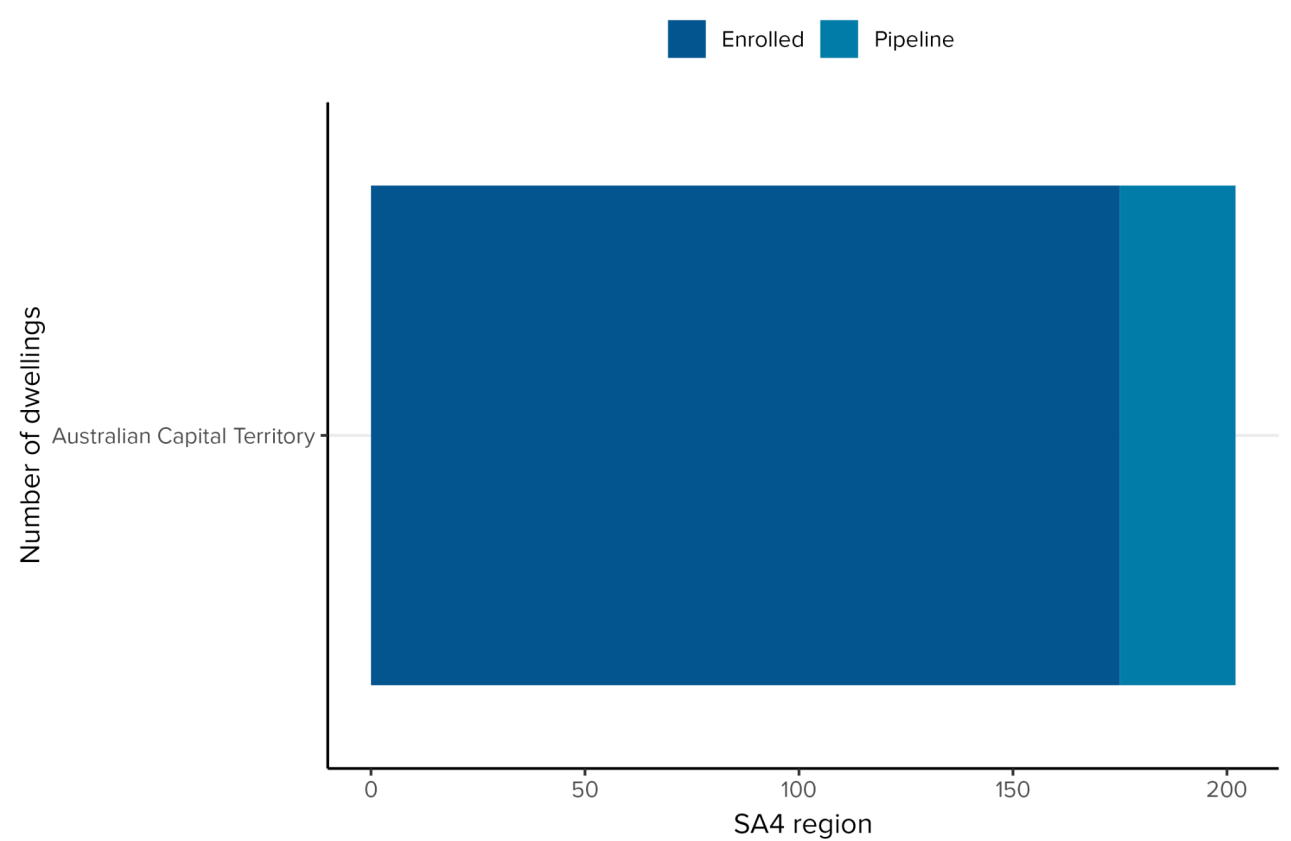
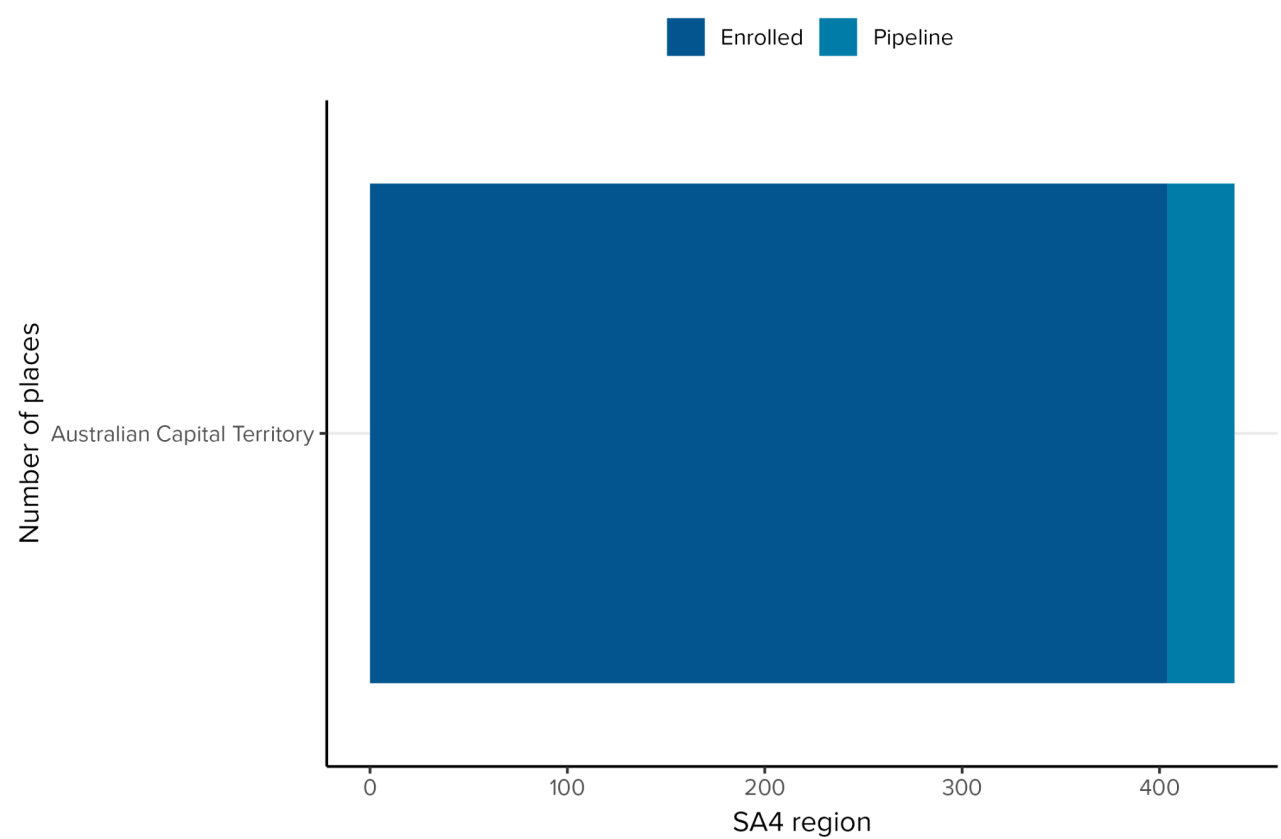


Figure 58 - Estimated SDA places in the Australian Capital Territory (ACT)



Northern Territory

For the Northern Territory, there are only 2 SA4 regions. The SDA dwellings and places are shown in Table 28, as well as in Figure 59 (number of dwellings) and Figure 60 (number of places). The geographic location of SDA pipeline places in the Northern Territory is also shown in Figure 61. ‘Northern Territory - Outback’ had 8 pipeline dwellings and 17 total dwellings (enrolled and pipeline combined), while ‘Darwin’ had 5 pipeline dwellings and 38 total dwellings.

Table 28 - Estimated number of SDA dwellings and places for each SA4 region in the pipeline in the Northern Territory (NT)

SA4 Region	Number of dwellings			Number of places		
	Enrolled	Pipeline	Total	Enrolled	Pipeline	Total
Darwin	33	5	38	89	6	95
Northern Territory - Outback	9	8	17	23	14	37
Total	42	13	55	112	20	132

Figure 59 - Estimated SDA dwellings in the Northern Territory (NT)

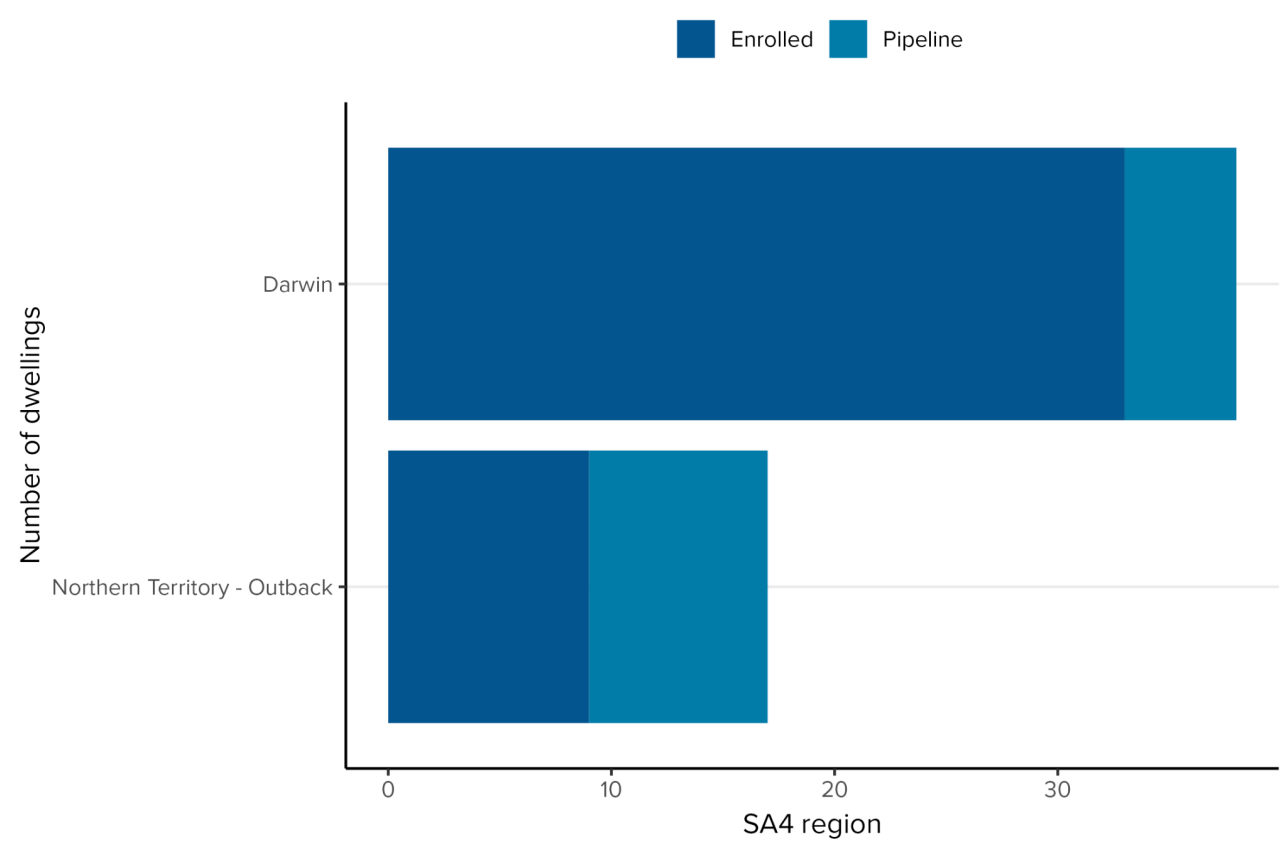


Figure 60 - Estimated SDA places in the Northern Territory (NT)

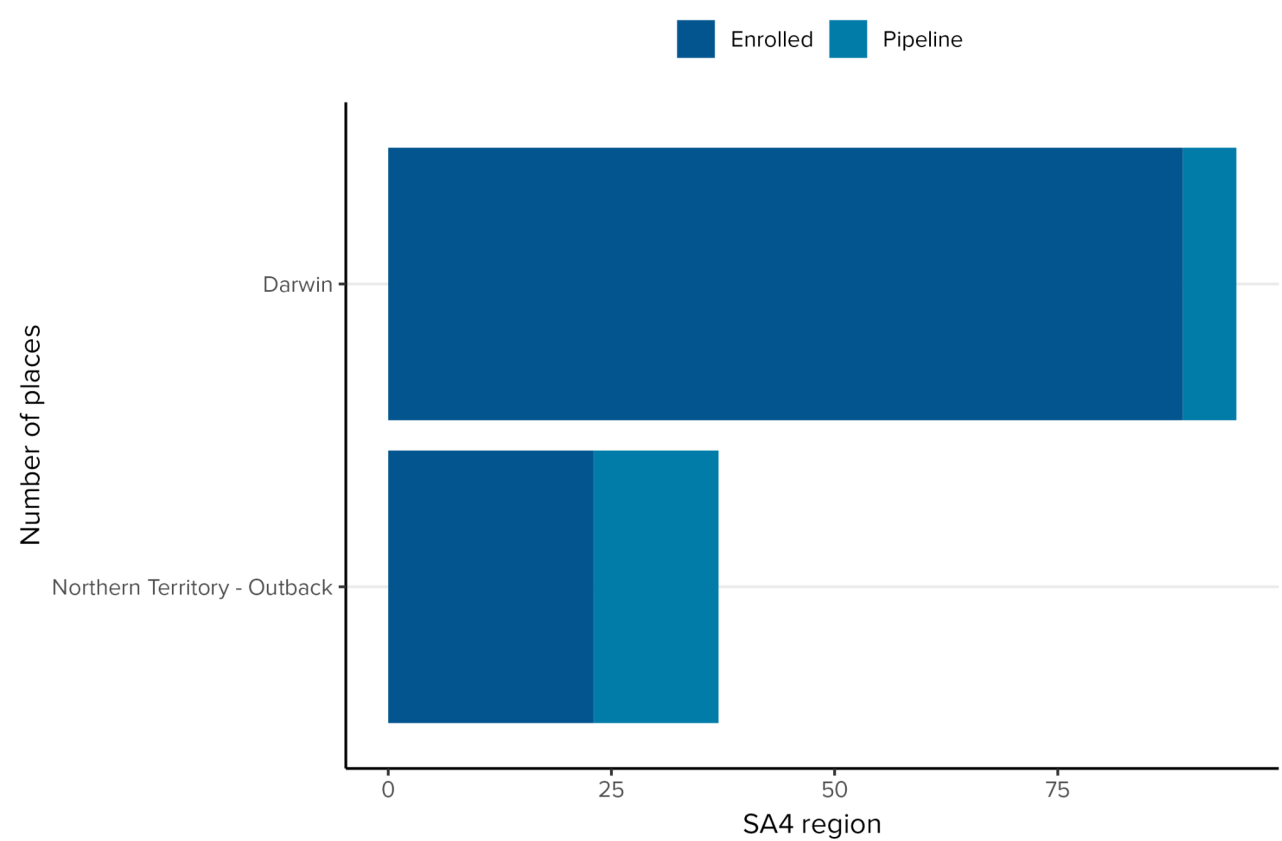
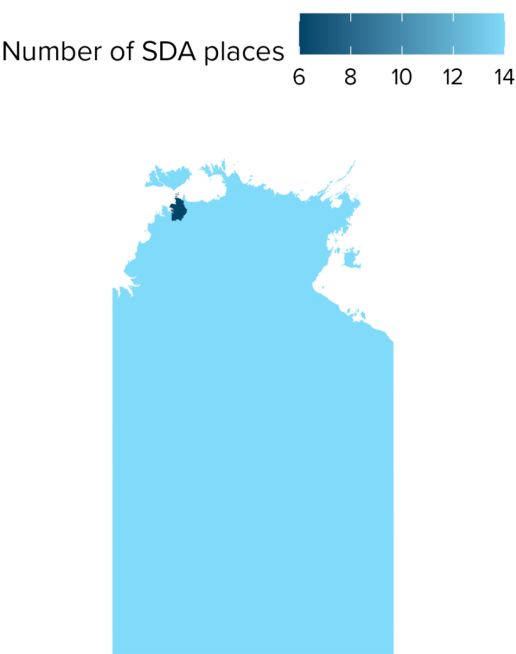


Figure 61 - SDA places in the pipeline in the Northern Territory (NT)



Future plans for SDA dwellings beyond the current pipeline

A total of 42 providers responded to this section of the survey, which asked providers about future plans to develop SDA dwellings beyond their current pipeline.

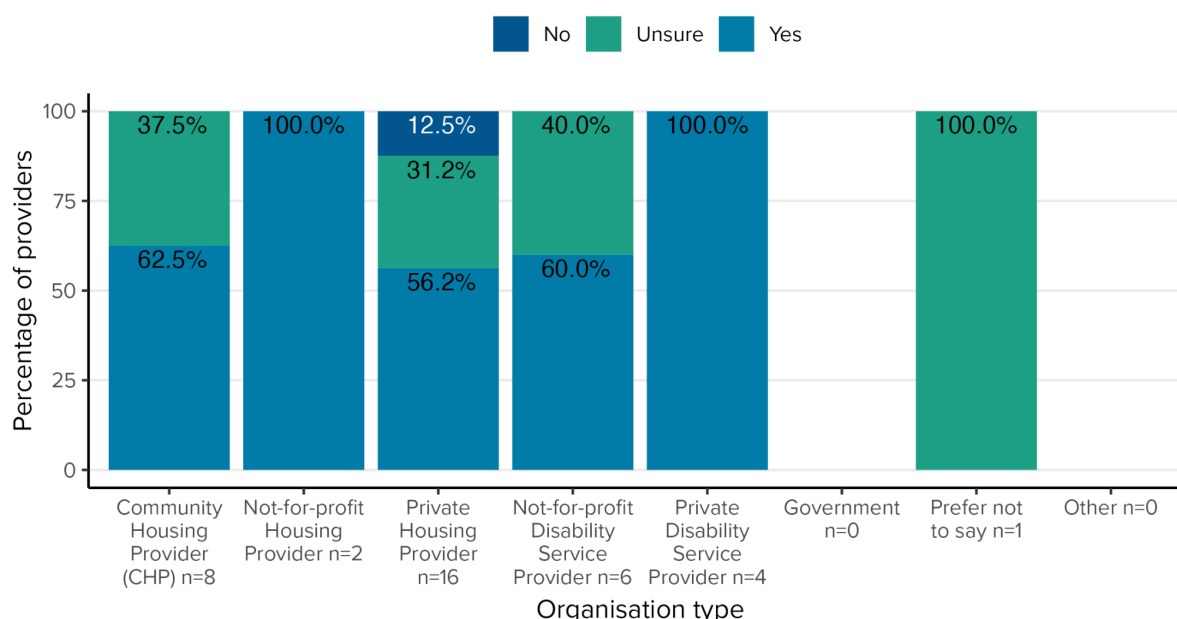
Plans to build more SDA dwellings beyond current pipeline

The majority of providers (61.9%) reported intentions to build further SDA dwellings beyond their current pipeline, while nearly one-third of providers (31.0%) were unsure if they would. The remaining providers (7.1%) reported having no intentions to build further SDA dwellings.

Future plans by organisation type

While 42 providers responded to the questions about future SDA dwelling plans, only 36 reported the type of provider they were (Figure 62). At least 50.0% of all providers across each organisation type indicated they plan to build further SDA dwellings (except for 'Prefer not to say', which only included 1 provider). Uncertainty was present for some not-for-profit disability service providers (40.0%), CHPs (37.5%), and private housing providers (31.2%). Only the private housing providers had providers who were not planning to develop further SDA dwellings (12.5%). These organisation types were also the groups that reported higher levels of being unconfident (from Figure 8).

Figure 62 - Plans to build SDA beyond the current pipeline by organisation type (*n* = 36)



Note = 'Prefer not to say' only consisted of 1 respondent; therefore, this proportion needs to be interpreted with caution

Number of places beyond current pipeline

The 39 providers who responded 'Yes' or 'Unsure' to having future SDA pipeline plans were also asked to indicate how many SDA places they would be planning to develop in the future. In total, 2,816 further places will potentially be developed, with providers' individual plans ranging from developing between 2 and 1200 more SDA places.

Reasons for being unsure or not having plans for future dwellings

The 14 providers who responded 'Unsure' or 'No' to having future SDA pipeline plans were given the opportunity to elaborate on why they did not intend to develop further SDA dwellings or why they were uncertain.⁶² After analysis, these elaborations were categorised into key themes.

Many providers reported that they were unsure on their plans because of **market and financial difficulties** (*n* = 7). This referred to having difficulties in finding approved SDA clients, uncertainties around the separation of SIL and SDA, delays with current pipeline dwellings, and waiting to further evaluate the market and demand data.

⁶² 16 providers reported 'unsure' or 'no' to having future pipeline plans. However, 2 'unsure' responses were removed - 1 provider indicated that their organisation partners with SDA developers, rather than develop the SDA themselves, while another provider did not provide a comment.

“Unsure - We have so many properties that have been delayed in the past 12 months that we really just want to get these over the line before considering anything else.” - Response from SDA provider.

Some providers ($n = 4$) also stated that whilst they were open towards developing further dwellings, they did not have any specific dwellings planned yet or that it was too early to report on these plans.

“[Unsure] We are - but do not yet have a confirmed number.” - Response from SDA providers.

Three providers reported that they were not planning on building more SDA dwellings. This was mainly due to having difficulties and frustrations working with the NDIA. One provider also cited that they are not intending on operating as a business, and their SDA dwelling was a one-off build.

“No - The business model is designed something like: Participants need freedom of choice where they live, they want tailored homes to suit their needs, however they need to be able to leave whenever they like, we need multi million dollar homes sitting empty to have more options in the market, and we cannot guarantee tenants with correct funding to get you started, and NDIA is also not granting SDA to those unless they really need it.” - Response from SDA provider.

Conclusion

In its sixth iteration, this SDA supply survey report enhances our shared comprehension of the market and provides valuable insights into the emerging trends in the supply landscape. The information presented in this report holds significance for various stakeholders within the SDA market, encompassing people with disability seeking SDA properties, the NDIA, SDA providers, developers, investors, as well as state and territory governments.

Being voluntary, this survey could not capture all data from the 355 registered active SDA providers in Australia. However, by integrating the survey findings with NDIA data on enrolled SDA, it offers vital supply data to the market. The results enhance existing data from the NDIA by providing more granular information on the SDA construction pipeline. This means it offers more practical knowledge about SDA under development than is possible to derive from publicly available data alone.

In total, 60 SDA providers contributed to the survey, including 55 who reported information about their development pipeline. Across these providers, 1,543 SDA dwellings were being developed, comprising 2,287 places. More than half of these places were being developed by private housing providers. In contrast to previous years, the location of SDA under development was less concentrated in Victoria, New South Wales and Queensland, with more activity occurring in other states, particularly Western Australia.

The survey revealed that the vast majority of all SDA places were being developed in either apartments, houses, or villas/duplexes/townhouses. Apartments alone comprised more than one-third of all new places under development, which is an increase from last year. Similar to 2022, over two-thirds of dwellings being developed will accommodate a maximum of 1 SDA resident. On the other hand, the proportion of new places in group homes continued to decline; accounting for only 5.6% of all places in the pipeline. This aligns with the preferences of many NDIS participants to live alone or with one or two others. This trend is also expected to continue, particularly given NDIA recommendations,⁶³ and the views of the Disability Royal Commission regarding the need to phase out group homes in Australia.⁶⁴

Similar to 2022, most SDA places being developed are High Physical Support. As a proportion of places across all design categories, High Physical Support has

⁶³ NDIA (2023). *Specialist disability accommodation pricing review 2022-23: Final report*. National Disability Insurance Agency. Downloaded 31 October 2023. <https://www.ndis.gov.au/media/6060>

⁶⁴ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*, Recommendation 7.43/44. Downloaded 31 October 2023. <https://disability.royalcommission.gov.au/system/files/2023-09/Final%20Report%20-%20Volume%207%2C%20Inclusive%20education%2C%20employment%20and%20housing%20-%20Summary%20and%20recommendations.pdf>

increased to nearly three-quarters, while the proportions of places in Robust, Improved Liveability, and Fully Accessible all fell from last year. The strong trend in favour of High Physical Support SDA should, however, be interpreted with caution, as some providers in this survey indicated that they will accept tenants funded for a different design category (such as Fully Accessible) for their High Physical Support dwellings. Moreover, pricing signals from the NDIA remunerating the development of other design categories in line with actual current costs may see a supply response in coming years.

In the *SDA Pricing Review*, most types of building configurations saw an increase in their pricing. However, prices for High Physical Support dwellings have stayed the same or decreased, particularly for apartments, which were reported as overpriced to begin with. This pricing shift is expected to increase stock in undersupplied design categories and build types, and improve participant access to SDA homes that meet their specific needs. Most providers in this survey believed that the changes to SDA pricing would have a financial impact, both positive and negative depending on whether the prices increased or decreased for the SDA they provide. Other providers noted that increased flexibility and diversity in housing options would be generated by the changes.

Pleasingly, providers rated their overall confidence in the SDA market as higher than in previous years. More than half of providers were confident, citing strong demand, improvements from the NDIA, and growing stakeholder relationships as key reasons underpinning their confidence. The proportion of providers who are unconfident fell to less than one-fifth, with providers noting ongoing issues such as complex funding approval processes, inconsistent NDIA decision-making, and enduring financial concerns. Similar to previous years, providers noted that when they are making decisions on the types, designs, and locations of SDA to develop they most often consult with people with disability, access published data, or speak with support providers.

Another welcomed shift in the market was captured in this year's survey with regards to the separation of housing and support services. Compared to previous years, a growing number of SDA providers are giving their tenants full choice over their support provider, which aligns with the views of the Disability Royal Commission.⁶⁵ Despite these positive trends, many NDIS participants who are likely eligible for SDA funding remain stuck in hospitals and RAC. While the NDIA has improved its market stewardship in the last year – reflected in rising provider confidence – more work

⁶⁵ Commonwealth Government (2023). Volume 7: Inclusive education, employment, and housing. *Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability: Final Report*, Recommendation 7.41. Downloaded 31 October 2023.

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

needs to be done to activate demand to ensure the SDA market lives up to its promise to deliver impact for people with disability.

Appendix A: Data screening for SDA supply pipeline

A total of 47 providers completed the SDA supply pipeline section of the current survey, together reporting a total of 1,430 dwellings. Please note that the survey focused on SDA dwellings in the pipeline, and therefore did not include any completed dwellings that had already been enrolled with the NDIA. This was to avoid duplication with what is already published by the NDIA. For the purpose of this survey, dwellings were defined to be in the pipeline if they were in 1 of the following development stages:

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

Based on these 1,430 dwellings, the total number of SDA places reported in the current pipeline was 2,081. Note that this only includes the pipeline data that was reported by providers who participated in this year's survey. Dwellings from the previous supply survey that were still considered to be in the pipeline but were not reported this year (because the provider did not participate in this year's survey) were added to this pipeline data. Dwellings were considered to still be in the pipeline if their estimated occupancy date was October 2023 or beyond (as reported by providers in the previous survey).⁶⁶ This resulted in an additional 113 dwellings and 206 places being added from a total of 8 providers, all of which did not provide any pipeline data in this year's survey.

Therefore, the pipeline data presented in the current report is based on the responses of 55 SDA providers. The combined pipeline total revealed that there were 1,543 dwellings in development, creating a total of 2,287 SDA places. This is equivalent to an average of 1.5 SDA residents per dwelling.

For accuracy, the statistical geography of each dwelling in the SDA pipeline was determined using the Australian Bureau of Statistics maps⁶⁷ to identify the 2016

⁶⁶ This date is an estimated occupancy date only and should be interpreted with caution

⁶⁷ Available here: <https://maps.abs.gov.au/>

Statistical Area Level 4 (SA4)⁶⁸. 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.

⁶⁸ The NDIA reports geographical data relating to SDA according to the Australian Statistical Geography Standard (ASGS) release 1, 2016. Therefore, the current report classified pipeline data according to the 2016 SA4 regions to enable comparisons to NDIA data.

Appendix B: List of contributors who provided consent for publication¹

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

- | | |
|---|---|
| 1. Ability Housing | 32. Paramount Disability Homes |
| 2. Ability SDA | 33. Project Friday |
| 3. Accessible Homes Australia | 34. SDA Management Australia |
| 4. ADAPT Housing Pty Ltd | 35. SDA Smart Homes Australia |
| 5. Adaptive Housing | 36. Seton Villa |
| 6. ARD Housing Group | 37. Specialist Disability Accommodation Pty Ltd |
| 7. Believe Housing Australia | 38. Specialist Disability Property 28 Pty Ltd |
| 8. Better Life Housing Pty Ltd | 39. St John of God Marillac |
| 9. Blue CHP | 40. Sunnyfield |
| 10. Charvin & Slaven Property Group | 41. Sylvanvale Limited |
| 11. Churches of Christ Housing Services Limited | 42. Synergy Housing |
| 12. Colac Otway Disability Accommodation Inc | 43. The trustee for Elks Investments (TAS) unit trust |
| 13. Community Housing Canberra | 44. Yaran SDA |
| 14. Community Living & Respite Services | 45. YourPlace Housing Ltd |
| 15. Cooina Terang Inc | 46. Yumba-Meta Limited |
| 16. Disability Homes Victoria | |
| 17. ELJET Property Group | |
| 18. Enliven Housing | |
| 19. Evolve Housing Ltd | |
| 20. Good Housing | |
| 21. Gproperty | |
| 22. Guardian Living Australia | |
| 23. Housing Choices Australia | |
| 24. Illowra | |
| 25. Independent Living Villages | |
| 26. iNSiTU Housing | |
| 27. Liverty Housing ⁶⁹ | |
| 28. Melba Support Services | |
| 29. Mercy Connect Limited | |
| 30. MS Plus | |
| 31. MyLife Housing | |

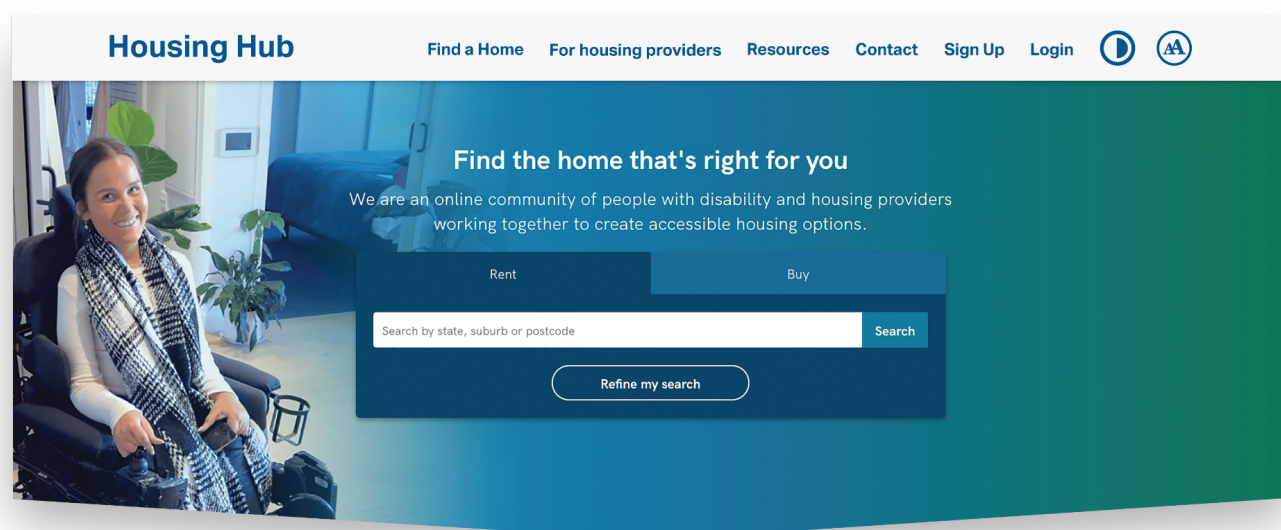
** The above list shows the providers who contributed to this year's survey and provided consent to be listed as a contributor.*

⁶⁹ Formerly known as Summer Housing

Appendix C: About the Housing Hub

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

The Housing Hub website – www.housinghub.org.au – lists properties for rent or sale that may be suitable for people with disability. With over 4,100 properties currently listed, the Housing Hub features all design categories of Specialist Disability Accommodation (SDA), as well as many other types of accessible housing. To understand more about the listings on the Housing Hub, review the [Listing Snapshot Report](#).



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

Generalised data resulting from housing seeker profiles on the Housing Hub provides insights into the demand for accessible housing across Australia. With over

8,000 seekers signed up with the Housing Hub as of July 2023, the insights generated are significant. Sharing the data gleaned from these interactions with the housing market enables the needs and preferences of people with disability to shape future development.

Resources

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

To explore, go to: www.housinghub.org.au/resources

Services for housing seekers

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

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

Services for housing providers and vendors

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

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

It is currently free to use the Housing Hub to create property listings and receive enquiries from prospective tenants. Pay for use of the Housing Hub along with a range of new provider features will commence in early 2024.

Premium services

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

Understanding the SDA Market

Understanding the SDA market is extremely important when planning your property pipeline. With access to critical information around supply and demand in the

accessible housing market, providers and investors can harness this knowledge to ensure building decisions match the needs of housing seekers.

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

Market data subscription

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

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

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

Market data report for a Local Government Area

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

SDA Supply - Premium Addendum⁷⁰

The SDA Supply Premium Addendum extends upon the Housing Hub’s annual *SDA Supply in Australia* report, providing a snapshot of the SDA dwellings in the pipeline across Australia.

The data is presented in a detailed spreadsheet format that enables information to be filtered and sorted to suit your individual needs.

The Premium Addendum includes:

- Pipeline data from the 2023 SDA supply survey shown by SA3 regions
- NDIA data on demand and supply shown by SA3 regions

⁷⁰ The next iteration of the addendum will be available for purchase early 2024.

- Pipeline conversion data tracking the progression of SDA pipeline dwellings from our 2021 SDA supply survey to our 2023 SDA supply survey

[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. Featured Listings are targeted to the audience from the state where the listing is located. [Click here for more information.](#)

Advertising

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

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

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 \(and click the "Listing Performance" heading\).](#)

Supporting prospective tenants to secure SDA and support funding

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

For more information on the Housing Hub's suite of services for housing providers and vendors, contact the Housing Hub's Customer Solutions Coordinator, Rachel Murray [via email](#) or by phoning 0497 814 567.

Appendix D: SDA design categories and building types

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

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

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

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

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

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

Multi-design - This option has been recently introduced by the NDIA. The NDIA's definition for multi-design dwellings is as follows: "SDA Design Standard compliant New Build dwellings with more than 1 bedroom and with bedrooms of differing design categories. A dwelling where all bedrooms meet several and the same design categories is not a multi-design category dwelling. In multi-design category dwellings, all shared areas must comply with the minimum requirements of all enrolled design categories."

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

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

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

Houses – detached low rise dwellings with gardens or courtyards.

Group Homes – houses that accommodate up to 5 residents.

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

Appendix E: 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 almost 2,000 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.

From 2017 to 2023 the Housing Hub's Tenancy Matching Service worked with SDA providers to identify potential tenants for new SDA projects in the pipeline. Over this time, the Tenancy Matching Service supported more than 950 participants to receive a housing offer in New Build SDA, including 116 younger people who were living in residential aged care. Through the work of the Tenancy Matching Service, the Housing Hub team has witnessed hundreds of SDA-eligible 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.

Many 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 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.