

SPECIALIST DISABILITY ACCOMMODATION Supply in Australia

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Specialist Disability Accommodation Supply in Australia is a new report about the supply of Specialist Disability Accommodation (SDA) across Australia.

The report, prepared by Social Ventures Australia and the Summer Foundation, provides results of a survey of SDA providers undertaken in late 2018 to determine how many SDA places are in development.

Background

In 2018 the Summer Foundation and SGS Economics and Planning published the *Specialist Disability Accommodation Market Insights* report which estimated current SDA supply and potential demand. NDIS data was not available for this analysis, so an alternative data source was used to provide estimates for SDA supply. This report also modelled the location of undersupply.

When the *Market Insights* report was presented at a series of seminars and other forums around Australia in 2018, there were calls for data that would give an indication of the SDA development pipeline to improve confidence in the direction of locations for new SDA investment.

NDIA data on SDA

The latest available data from the National Disability Insurance Agency (NDIA) as at December 2018 indicates 10,975 participants have SDA funding in their plans (39% of an expected total of 28,000 participants with SDA funding), and there are 2,593 dwellings enrolled as SDA. However, the NDIA does not currently collect information about upcoming SDA supply that is not yet enrolled with the NDIA (i.e. SDA currently planned or being built).

National survey results

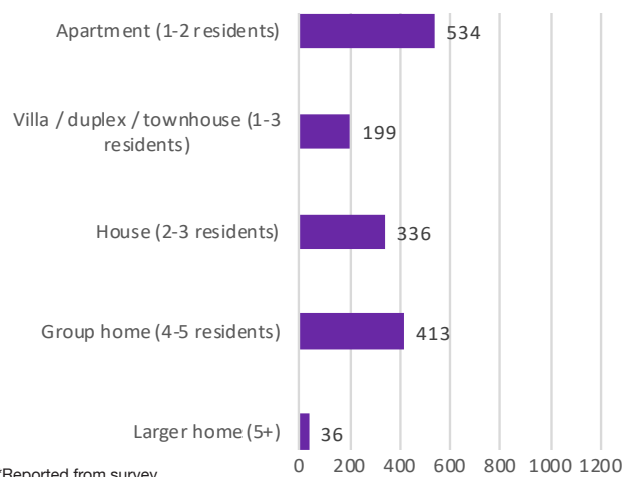
The *Specialist Disability Accommodation Supply in Australia* report indicates that there are 1,518 SDA places in development around Australia, with the most activity in NSW, Victoria and South Australia.

Number of SDA places in development

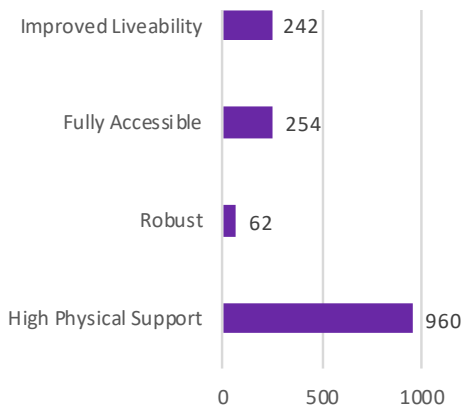
ACT	32
NSW	635
NT	0
QLD	99
SA	336
TAS	14
VIC	386
WA	16
National	1,518

The survey has revealed that the most common building types in the current SDA development pipeline are apartments and group homes. The pipeline is dominated by High Physical Support designs, with very little Robust capacity being built.

New SDA supply* by Building Type



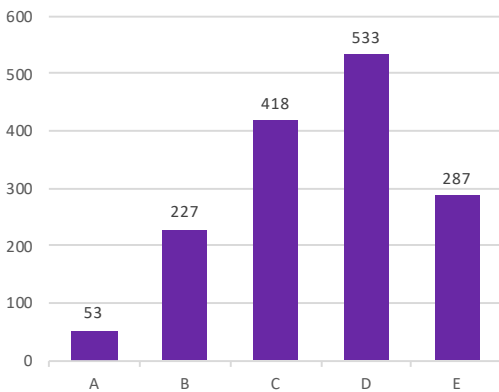
New SDA supply* by Design Category



*Reported from survey

The survey indicates that over 80% of places are at pre-construction or construction stages of development. Three-quarters of the reported supply is anticipated to be delivered by early 2020.

New SDA supply by stage of development



Development status:

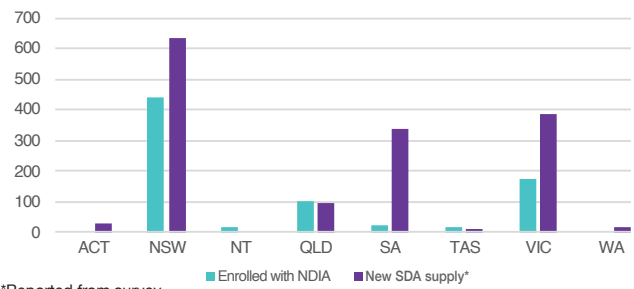
- A. Completed after 1 April 2017 and enrolment confirmed with NDIA
- B. Construction completed, pending enrolment
- C. Under construction
- D. Development & building approval completed & contractually committed to build
- E. Land secured, waiting for development approval, building approval and/or finance approval

New Build SDA enrolled with NDIA

The NDIA has recently reported that 718 places of newly built SDA have been enrolled as at end December 2018.

SDA New Build enrolments with the NDIA are much higher in NSW than in other jurisdictions. The Report compares New Build SDA enrolled with the NDIA and the results of the survey.

New Build SDA enrolled compared with new SDA supply* by jurisdiction

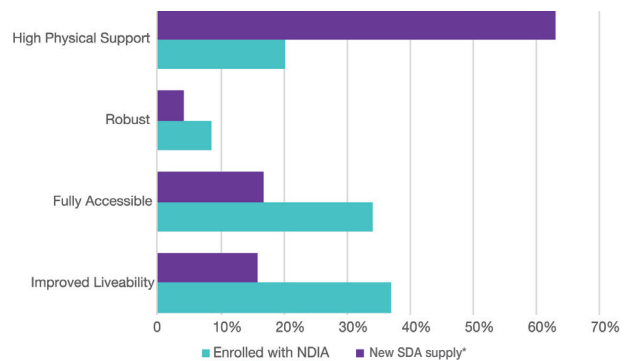


*Reported from survey

There is a significant difference between the profile of New Build SDA places enrolled with the NDIA and the future SDA supply reported through the survey.

While just 20% of New Build SDA places enrolled with the NDIA are High Physical Support, over 60% of places in the development pipeline are High Physical Support.

New Build SDA enrolled compared with new SDA supply* by Design Category



*Reported from survey

Around 12,000 new SDA places need to be created to meet the anticipated demand from NDIS participants with SDA funding. The survey indicates that a solid start has been made in the new SDA market, with over 2,000 new SDA places either enrolled or in the development pipeline. It is also important to note that some of these 2,000 new places will be used to replace outdated or inappropriate housing for some of the existing 16,000 SDA residents.

Technical note:

1. Survey data used in this report is from data reported by 55 organisations with SDA development projects at various stages of development or completed and enrolled with the NDIA since April 2017.
2. All survey data is reported as number of SDA places.

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