

NDIS specialist disability accommodation 2020-21 quarter 4 report

[ndis.gov.au](https://www.ndis.gov.au)

ndis

Contents

1.	Introduction to data released by the NDIA	3
1.1	How to use this report	3
1.2	Commonly used terms	4
2.	SDA supply market overview	5
2.1	Dwelling enrolments	5
2.2	Dwellings by design category	6
2.3	Dwellings by number of residents	7
2.4	Locations	9
3.	SDA participant market overview	11
3.1	Eligible participant profiles	11
3.1.1	Participant demographics	13

1. Introduction to data released by the NDIA

The National Disability Insurance Agency (NDIA) is committed to providing the Specialist Disability Accommodation (SDA) market with the information it needs to foster continued growth for a thriving market that delivers quality, innovative SDA for participants and important national infrastructure.

The NDIA has been steadily increasing the amount of data published about SDA.

Release of data sets into a new and growing market is a balancing exercise for the NDIA in its market stewardship role. There is a need for such releases to be done in a responsible way, as data needs to be collated, reviewed and analysed to ensure that it is providing an accurate representation of the state of the market.

Small sample sizes are often involved early on in a market's development – longer term trends are better at presenting a more accurate picture. The NDIA has tried to provide data to the market as soon as it is possible and responsible to do so.

Since the introduction of SDA, the NDIA now publishes the following categories of data:

- participant funding levels, including plan utilisation and Supported Independent Living (SIL) supports for SDA-eligible participants;
- enrolled dwelling information, including design category and bedrooms, to Statistical Area Level 4 (SA4) level;
- the number of in-progress or unfinished SDA dwellings in the pipeline, and
- SDA demand data at the Statistical Area Level 3 (SA3) to help registered providers identify areas in need of additional supply.

This report is based on the data that is released regularly through the [NDIA's Quarterly Reports](#) and data on the [NDIS data and insights webpage](#). These are the SDA data tables for 'Appendix P' published in the Quarterly reports to the disability ministers and additional datasets for SDA enrolled dwellings and NDIS demand data published for that quarter.

This report will feature observations into publically available NDIA data and introduce new SDA data; participants with SDA cohort characteristic data.

The NDIA will continue to develop the release of information and analysis to the market on key features of expected SDA supply and demand as well as continue to engage with stakeholders to gather feedback on the market information being released and ways in which these can be further enhanced for the benefit of participants and providers.

1.1 How to use this report

This report supplements the data that is released regularly through the [NDIA's Quarterly Reports](#) and data on the [NDIS data and insights webpage](#).

Participants, providers and other stakeholders can use this report as a starting point for engaging further with the very detailed SDA data that is contained in the [NDIS Quarterly Reports](#), either through those publications or on the [NDIS data and insights webpage](#).

1.2 Commonly used terms

Culturally and Linguistically Diverse (CALD): Country of birth is not Australia, New Zealand, the United Kingdom, Ireland, the United States of America, Canada or South Africa, or primary language spoken at home is not English.

In-kind: Existing Commonwealth or state/territory government programs delivered under existing block grant funding arrangements.

Specialist disability accommodation (SDA) is accommodation for people who require specialist housing solutions, including to assist with the delivery of supports that cater for their extreme functional impairment or very high support needs.

SDA does not refer to the support services, but the homes in which these support services are delivered. SDA may include specialist designs for people with very high needs or may have a location or features that make it feasible to provide complex or costly supports for independent living.

SDA design categories

Enrolled dwelling: means a dwelling enrolled under section 26 of the *National Disability Insurance Scheme (Specialist Disability Accommodation) Rules 2020* to provide specialist disability accommodation.

Existing: Dwellings built before 1 April 2016 that were used as disability related supported accommodation under a previous state, territory or commonwealth scheme. Existing dwellings must substantially comply with the requirements of a new build, and must meet the maximum resident requirement (5 residents or less).

Legacy: Existing dwellings that do not meet the maximum resident requirement of 5 residents or less. Over time, the NDIA will stop making SDA payments towards legacy dwellings.

New Build: An SDA dwelling that was built (has a certificate of occupancy dated) after 1 April 2016 and meets all of the requirements under the [SDA Rules 2020](#) and the [Pricing Arrangements for Specialist Disability Accommodation 2021-22](#).

New Build (refurbished): A dwelling that was built before 1 April 2016 but has been significantly refurbished since and now meets all of the requirements for a new build in the [SDA Rules 2020](#) and [Pricing Arrangements for Specialist Disability Accommodation 2021-22](#). In order to qualify a new build (refurbished), providers must spend a minimum amount. These minimum amounts are specified per dwelling type in Appendix F of the [Pricing Arrangements for Specialist Disability Accommodation 2021-22](#).

2. SDA supply market overview

2.1 Dwelling enrolments

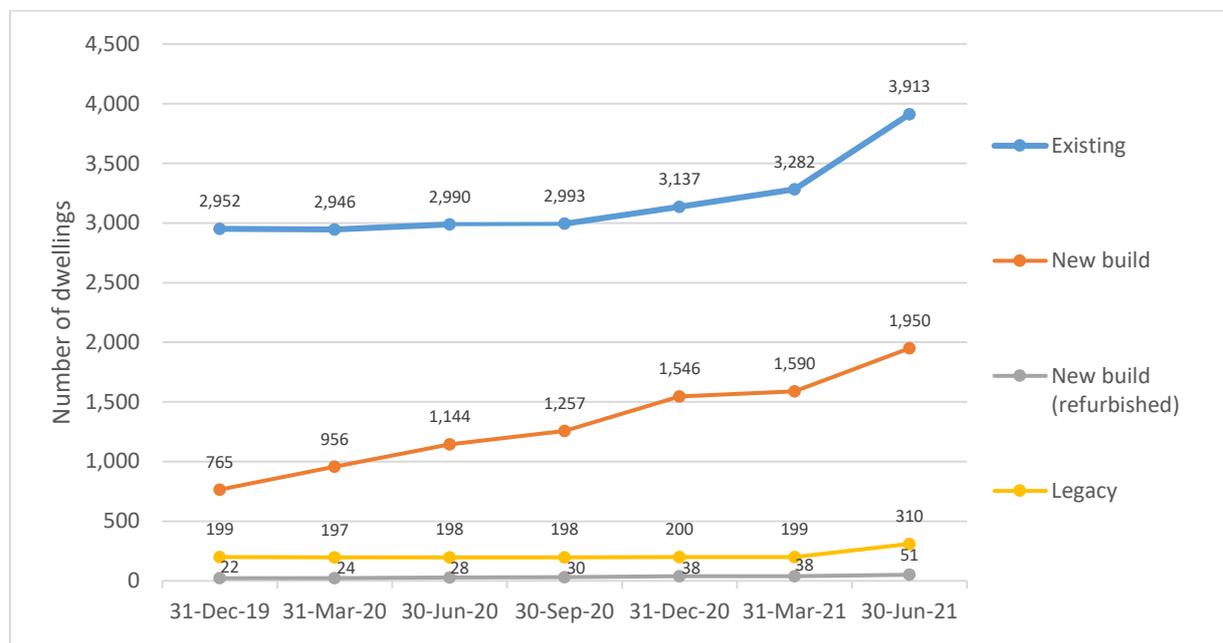
Since Q2 FY19-20, just over half of the growth in total SDA stock (52%) has come from new builds (1,185 dwellings). 42% of dwellings came from existing stock (961 dwellings), 5% for legacy stock (111), whereas new build (refurbished) only contributed to 1% of overall SDA dwelling increase in the same timeframe (29 of 2,286 dwellings).

Since Q4 FY19-20 (same time last year), within each build type, new build dwellings has seen steady growth, with a 70% growth in stock enrolled since then.

Since Q3 FY20-21, there has been a 23% increase in new build. Also since Q3 FY20-21, the stock of legacy housing increased by 56% and existing SDA stock numbers saw a 19% growth from the previous quarter, both considerably larger than previous quarters mostly due to Victoria's transition of in-kind arrangements (explained further in NDIA Observations section below).

Further breakdown by SA4 regions in states and territories can be found within 'Table P.4' in the SDA quarterly report to disability ministers.

Figure 1: Enrolled SDA dwellings by building type (excludes in-kind arrangements)



NDIA observations

The stock of enrolled SDA dwellings is increasing steadily, having grown by 58% since Q2 FY19-20 (although partly due to state government in-kind stock being transferred to enrolled dwellings).

New build stock - the main source of growth - has seen stable increases over each quarter since Q2 FY19-20. Nearly all recent additions have come from the marketplace, with only 12% of new build and new build (refurbished) dwellings added over the last quarter being due to in-kind transitions.

Enrolled existing category SDA stock numbers have remained relatively stable until more recent quarters. When Victoria completed its transfers to enrolled stock from in-kind last quarter, 95% of the total 861 newly enrolled dwellings were existing stock (which explains the jump in existing and legacy stock in the last quarter).

With all jurisdictions now part of the NDIS, it is expected that the vast majority of existing SDA should be accounted for in these figures. The NDIA expects some increases in the future as Western Australia's stock (which is currently neither enrolled nor in-kind) is brought into the NDIS. Tasmania also has 203 in-kind dwellings to transition in future quarters.

2.2 Dwellings by design category

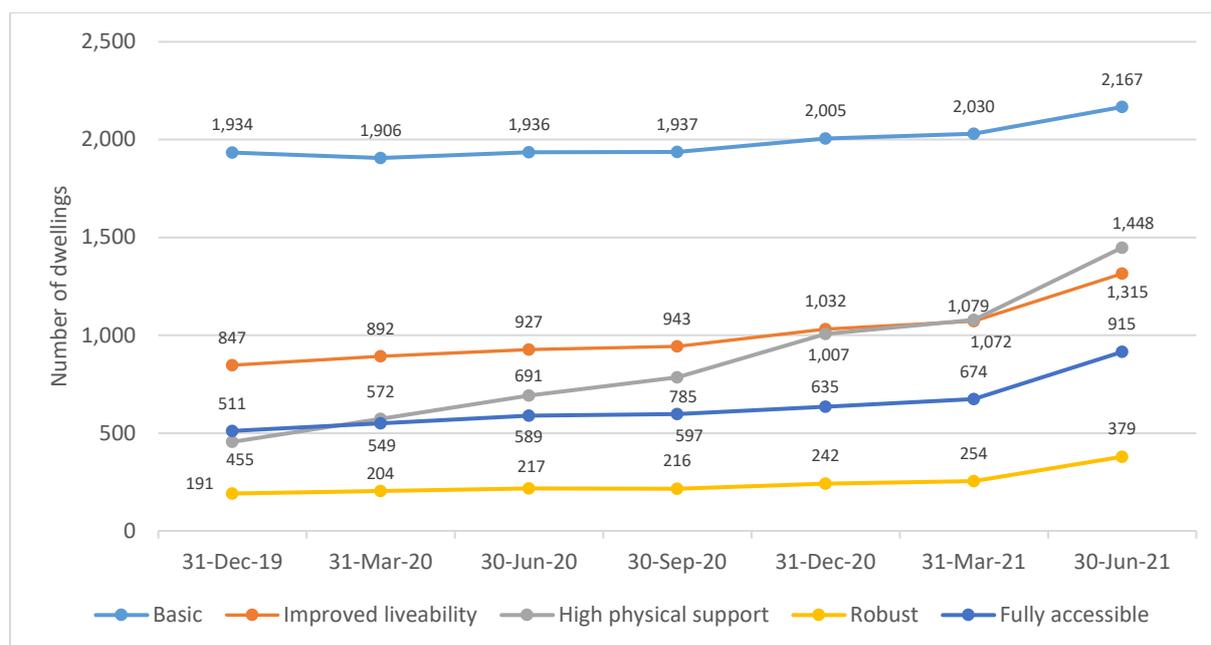
Since Q2 FY19-20, high physical supports stock has increased by 218%. This is more than double the increases in robust (98%), almost triple fully accessible (79%), and almost quadruple improved liveability (55%). Basic stock increased by 12% over this period which is mostly attributable to Victoria's transition of in-kind arrangements. Moreover, for all categories other than high physical supports, most of this increase only occurred in the most recent quarter due to Victoria's transition of its in-kind portfolio.

The increase in high physical support dwellings over the period since Q2 FY19-20 (993 dwellings) was more than double the number of either new increased improved liveability dwellings (468) or of fully accessible dwellings (404). The increase in high physical support dwellings over this period was also more than quadruple that of either basic dwellings (233) or robust dwellings (188).

Since Q4 FY19-20, the largest percentage growth in enrolments has been seen in high physical support dwellings (110%), followed by robust dwellings (75%) and fully accessible dwellings (55%). From Q3 FY20-21, these 3 dwelling types continue to be the fastest growing (34%, 49% and 36%, respectively).

Further breakdown by SA4 regions in states and territories can be found within 'Table P.5' in the SDA quarterly report to disability ministers.

Figure 2: Growth in dwelling enrolments by design categories (excludes in-kind arrangements)



NDIA observations

While high physical support has the largest increase in dwellings, all design categories have seen increases in their build type since Q2 FY19-20. The increase across all design categories in Q4 FY20-21 can be mostly attributed to Victoria’s in-kind transition and these dwelling numbers now appearing in this data. In Q3 FY20-21, Victoria’s in-kind stock was 91 basic, 230 improved liveability, 155 high physical support, 108 robust and 277 fully accessible dwellings, which all have been transitioned.

The majority of growth in high physical support is not from Victoria’s in-kind transition but from marketplace providers.

2.3 Dwellings by number of residents

Since Q2 FY19-20, the largest growth has been in single resident dwellings, both in absolute terms (819 dwellings) and in percentage terms (85%).

Similarly, looking at just the last year, since Q4 FY19-20, the largest increase in enrolled dwellings was single resident dwellings (589 dwellings) followed by 5-resident dwellings (451 dwellings). Much of the growth since Q2 FY19-20, for all dwelling sizes, has occurred in the last quarter. Across all building sizes, more dwellings were added in Q4 FY20-21 than in the 3 previous quarters combined. The largest increases over the last quarter were for 6 or more resident legacy stock dwellings (56%) and 5-resident dwellings (42%), which is mostly attributable to Victoria’s transition of in-kind arrangements.

Further breakdown by SA4 region for each state and territory can be found within ‘Table P.6’ in the SDA quarterly report to disability ministers.

Figure 3: Enrolled SDA dwellings by maximum number of residents (excludes in-kind arrangements)

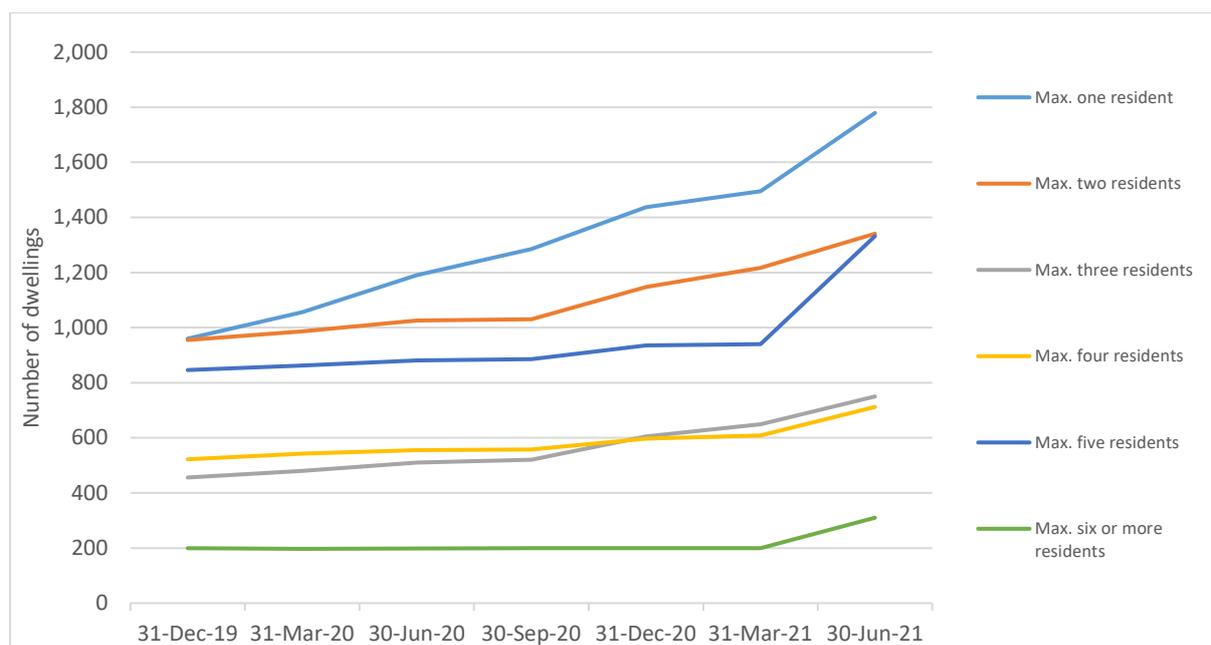


Table 1: Enrolled SDA dwellings by maximum number of residents (excludes in-kind arrangements)

Maximum number of residents in SDA dwelling	31-Dec-19	31-Mar-20	30-Jun-20	30-Sep-20	31-Dec-20	31-Mar-21	30-Jun-21
One resident	960	1,056	1,190	1,285	1,437	1,495	1,779
Two residents	955	986	1,026	1,030	1,147	1,217	1,341
Three residents	456	480	510	520	605	649	750
Four residents	522	542	555	558	597	609	712
Five residents	846	862	881	885	935	940	1,332
Six or more residents	199	197	198	200	200	199	310

NDIA observations

The increase in larger dwellings (5 and 6 residents) over the last year is mostly driven by Victoria’s stock transferring out of in-kind and is unlikely to be repeated as currently only Tasmania has in-kind stock. Of Tasmania’s 203 in-kind dwellings still to be transferred, only 12 are 5-resident and zero are 6 or more residents. As new build and existing stock dwellings are limited to 5 residents or less, 6 or more resident dwellings are not expected to grow further once all states, including Western Australia, finalise their enrolments.

As Figure 3 shows, growth in single-resident enrolments has exceeded other sized dwellings for a considerable period of time and is largely market-driven.

2.4 Locations

Since Q2 FY19-20, New South Wales, Queensland and South Australia have seen moderate growth rates in their SDA housing stock (30%, 57% and 16% respectively). The Australian Capital Territory (1200%) and Western Australia (550%) have experienced large growth rates, but from small baselines (11 and 10 dwellings, respectively). Housing stock in the Northern Territory remained unchanged, and Tasmania's housing stock has decreased by 10%. Victoria has almost tripled its enrolled SDA stock (a 192% increase), accounting for almost half (49%) of the total national growth in SDA dwellings over the period. This is largely due to the Victorian government's stock no longer being in-kind, and thus now appearing in enrolled stock data.

Since Q4 FY19-20, growth rates have continued to be high in the Australian Capital Territory, Victoria and Western Australia, all increasing their stock by more than 100%. Tasmania and the Northern Territory reversed some of their earlier decreases.

Since Q3 FY20-21, Victoria added 904 dwellings (81% of Victoria's total growth since Q2 FY19-20 and is mostly due to its transition of in-kind arrangements).

Note, this section is for the number of enrolled dwellings in a jurisdiction and does not equal the total number of SDA residents or potential residents.

Further breakdown by design category, build type and SA4 region for each state and territory can be found within 'Table P.13' and 'Table P.14' in the SDA data published on the [NDIS data and insights webpage](#).

Figure 4: Enrolled SDA dwellings by state and territories (excludes in-kind arrangements)

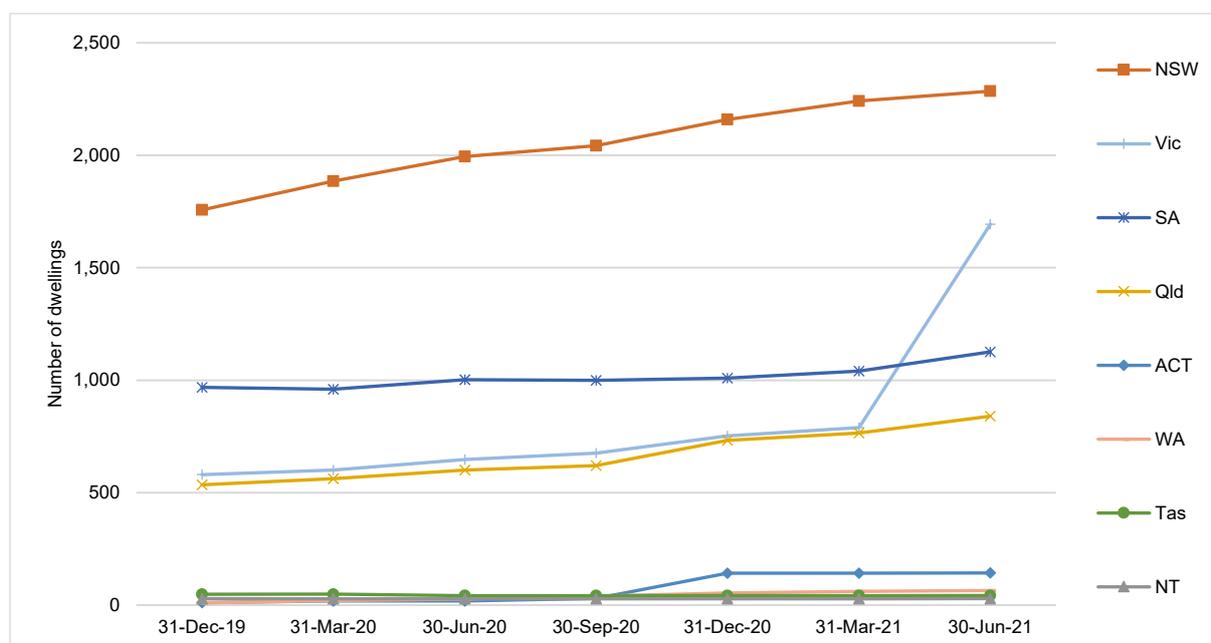


Table 2: Enrolled SDA dwellings by state and territories (excludes in-kind arrangements)

State	31-Dec-19	31-Mar-20	30-Jun-20	30-Sep-20	31-Dec-20	31-Mar-21	30-Jun-21
NSW	1,757	1,885	1,994	2,042	2,159	2,242	2,285
Vic	580	600	647	676	753	789	1,693
Qld	535	562	601	621	732	765	840
WA	10	20	27	40	54	61	65
SA	968	960	1,002	999	1,010	1,040	1,126
Tas	48	49	42	42	43	42	43
ACT	11	19	19	30	142	142	143
NT	29	28	28	28	28	28	29
Total	3,938	4,123	4,360	4,478	4,921	5,109	6,224

NDIA observations

Total enrolled SDA dwellings have grown by 43% from Q4 FY19-20, nearly all of which is from Victoria, largely due to the transfer from in-kind arrangements which was completed during Q4 FY20-21. Otherwise, dwelling growth has been steady in all jurisdictions except Tasmania and the Northern Territory (small or negative). There has been substantial growth in the Australian Capital Territory (fourth largest absolute increase in dwellings over the last year), mostly attributable to the Australian Capital Territory Government’s dwelling enrolments.

The NDIA expects some increases in the future from Western Australia transferring stock to the NDIS, and from Tasmania’s 203 in-kind dwellings transitioning in coming quarters.

It should be noted that while the number of enrolled bedrooms equals the number of SDA residents, there are also more participants seeking SDA accommodation, and more dwellings under construction.

3. SDA participant market overview

3.1 Eligible participant profiles

There was a total of 16,033 participants with SDA in their plans in Q4 FY20-21. New South Wales and Victoria are still the 2 largest states, by overall participants with SDA. The trend since Q2 FY19-20 can be seen in Figure 6.

Figure 5: Participants with SDA by states or territory of residence at Q4 FY20-21



Figure 6: Active participants with SDA funding in current NDIS plan in states and territories

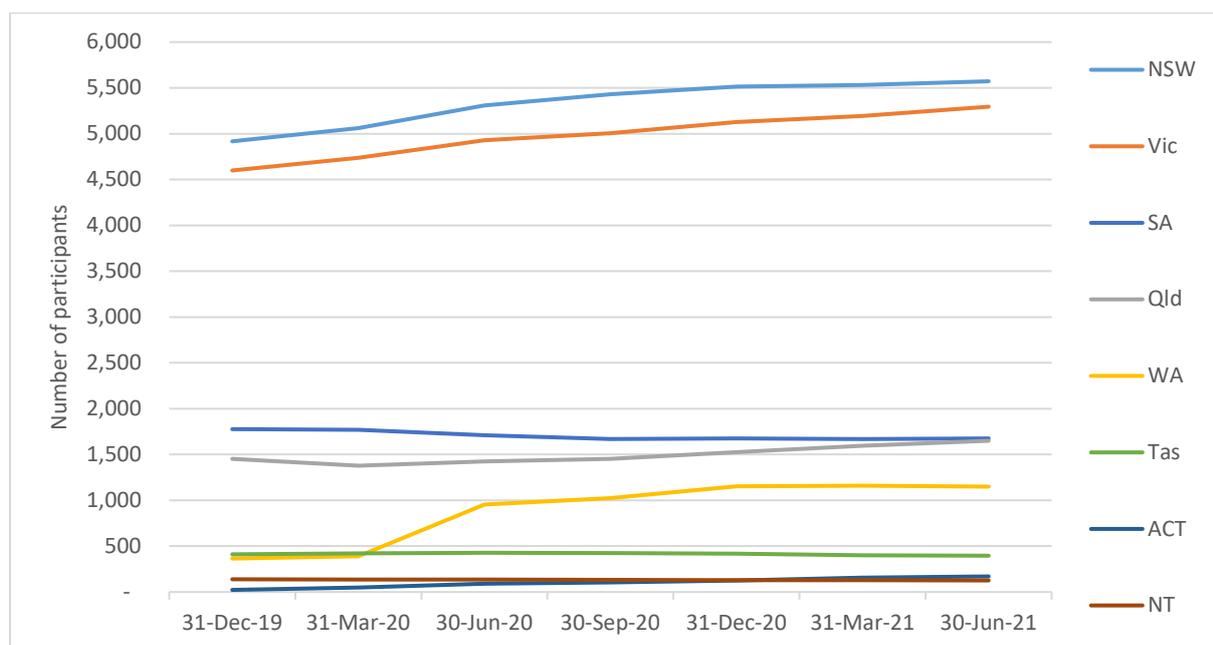


Table 3: Active participants with SDA funding in current NDIS plan in states and territories

State	31-Dec-19	31-Mar-20	30-Jun-20	30-Sep-20	31-Dec-20	31-Mar-21	30-Jun-21
NSW	4,917	5,061	5,307	5,429	5,513	5,533	5,572
Vic	4,599	4,738	4,929	5,004	5,128	5,195	5,295
Qld	1,452	1,378	1,425	1,451	1,524	1,595	1,650
WA	365	391	954	1,024	1,152	1,160	1,149
SA	1,777	1,770	1,711	1,669	1,676	1,670	1,675
Tas	411	421	428	424	417	402	396
ACT	23	48	92	106	127	158	170
NT	139	137	136	132	130	129	126
Total	13,683	13,944	14,982	15,240	15,667	15,842	16,033

Between Q2 FY19-20 and Q4 FY20-21, growth rates for east coast states was steady at 13% for New South Wales, 14% for Queensland and 15% for Victoria. In the west, participant numbers increased by over 200% in Western Australia. In most of the smaller states, participant numbers fell, down by 4% in Tasmania (15), 6% in South Australia (102) and 9% in the Northern Territory (13). Participant numbers in the Australian Capital Territory increased from 23 to 170 over the period. While this is large in terms of percentage growth rates, it is small in terms of absolute numbers.

NDIA observations

Of the 16,033 participants in an SDA dwelling, 10% are currently seeking alternative accommodation (1,668). In addition to this 16,033 participants, there are a further 1,795 participants not currently residing in a SDA but are seeking a dwelling in the current quarter. This is detailed further by SA4 region for each state and territory within 'Table P.11' in the SDA quarterly report to disability ministers.

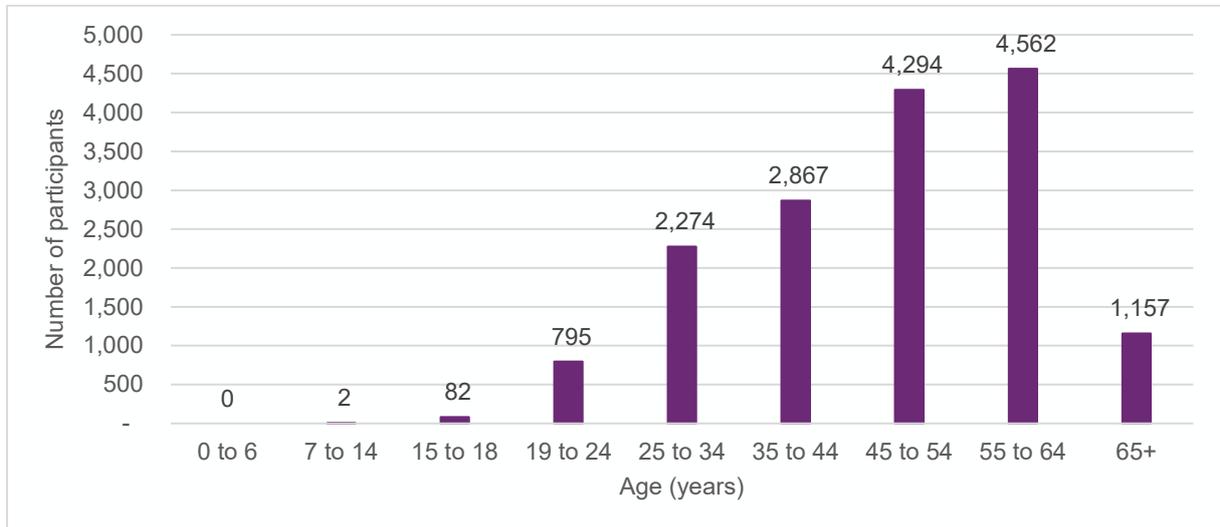
Some participants who may be eligible for SDA or other types of accommodation support in the NDIS are those currently residing in residential aged care. As at Q4 FY20-21, for participants with an approved plan, there were 3,232 participants aged under 65 years in residential aged care. Of these 3,232 participants, 89 were aged under 45 years (2.8%). The Government continues to work on reducing the number of participants entering residential aged care and to support participants already living in residential aged care to move into more age-appropriate accommodation, unless the person has exercised informed choice and decided to remain in residential aged care.

3.1.1 Participant demographics

Age

The majority of SDA-eligible participants are aged between 45 and 64.

Figure 7: Participants with SDA by age at Q4 FY20-21



NDIA observations

This reflects the aging population that have transitioned into the NDIS from previous state and territory support models. Over time this may have some bearing on housing needs of SDA-eligible participants. For example, elderly SDA participants may need to move out of dwellings with stairs. As other SDA-eligible participants are identified, it is expected that the age demographic may also see increases in other ages over time.

Primary disability type

Almost half of participants with SDA have an intellectual disability as their primary disability (48%). The next 2 largest are participants with cerebral palsy (12%) and participants with autism (11%).

Table 4: Percentage of participants with SDA by primary disability type at Q4 FY20-21

Primary disability	Number of SDA participants	Proportion of SDA participants
Intellectual disability	7,661	48%
Cerebral palsy	1,845	12%
Autism	1,684	11%
Down syndrome	1,281	8%
Acquired brain injury (ABI)	1,194	7%
Other neurological	679	4%
Psychosocial disability	644	4%
Stroke	267	2%
Multiple sclerosis	252	2%
Other physical	217	1%
Spinal cord injury	194	1%
Other	60	0%
Visual impairment	51	0%
Hearing impairment	4	0%
Total	16,033	100%

Other characteristics

Figure 8: Participants with SDA who identify with a gender at Q4 FY20-21

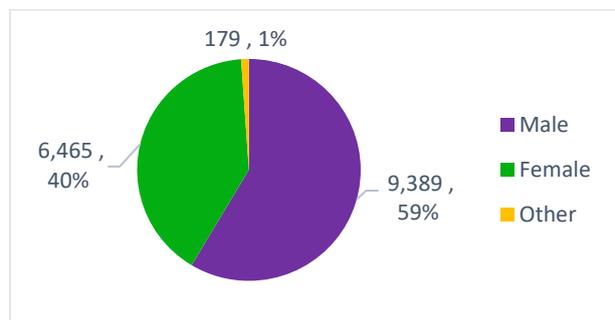


Figure 9: Participants who identify as indigenous at Q4 FY20-21

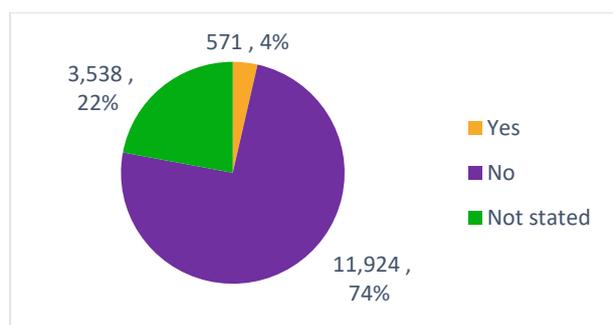
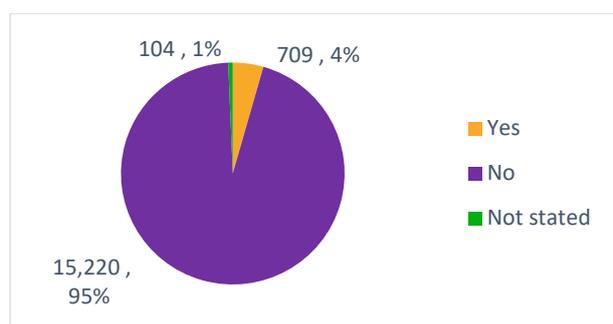


Figure 10: Participants by CALD status at Q4 FY20-21



NDIA observations

Participants who identify as male account for 59% of the SDA population, which is a slightly smaller proportion than for all NDIS participants (62%). For participants with SDA, this is still almost 1.5 participants who identify as male for every participant who identifies as female (9,389 compared to 6,465).

There are relatively small numbers of participants with SDA who identify as Culturally and Linguistically Diverse (CALD) (4%) or Indigenous (4%). (Noting 22% of participants with SDA were “not stated” for Indigenous status).

These are smaller proportions than for all Scheme participants in Q4 FY20-21, where 6.9% of participants identified as Aboriginal or Torres Strait Islander (32,396) and 9.5% of active participants identified as CALD (44,113).