SPECIALIST DISABILITY ACCOMMODATION: MARKET INSIGHTS

SGS Economics & Planning

SUMMER FOUNDATION

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EXECUTIVE SUMMARY

01

The purpose of this report is to demonstrate the scale and distribution of demand for Specialist Disability Accommodation (SDA) under the National Disability Insurance Scheme (NDIS) with a view to mobilizing both private and community sector interest in provision of this housing.

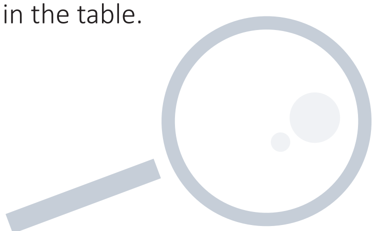
Priority areas for provision of SDA are identified through three different lenses.

The first identifies locations which are currently underserved with SDA having regard to the national average rate of per capita provision. This is the *'supply perspective'.*

Recognising that the need for SDA may not follow population shares, the second lens interfaces the current supply data with the estimated future distribution of demand for these services. This is the '*demand distribution perspective'.*

The third lens is that of a property investor looking to simultaneously meet SDA needs and generate sound financial returns. This approach interfaces the estimated distribution of demand for SDA with an index of potential property market gains.

Top ranking areas under each of these perspectives are summarised in the table.



	Supply perspective	**Demand perspective**	**Investor perspective**
Sydney / NSW	Sydney Inner City	Wagga Wagga	Marrickville- Sydenham- Petersham
	Fairfield	Griffith- Murrumbidgee (west)	Strathfield- Burwood- Ashfield
	Eastern Suburbs- North	Taree- Gloudcester	Kograh- Rockdale
	Gosford, and	Port Macquarie	Canterbury
	Kograh- Rockdale.	Coffs Harbour	Parramatta
Melbourne / Victoria	Wyndham	Tullamarine- Broadmeadows	Tullamarine- Broadmeadows
	Geelong	Dandenong	Brunswick- Coburg
	Casey South	Brimbank	Moreland- North
	Tullamarine- Broadmeadows	Knox	Keilor
	Melbourne City	Warnambool- Otway Ranges	Darebin- North
Brisbane / Queensland	Hills District	Springwood- Kingston	Holland Park- Yeronga
	Ormeau- Oxenford	Ipswich Hinterland	Nathan
	Townsville	Townsville	Chermside
	Brisbane Inner	Mt Gravatt	Mt Gravatt
	Ipswich Hinterland	Mackay	Nundah
Adelaide / South Australia	Onkaparinga	Salisbury	Adelaide City
	Tea Tree Gully	Onkaparing	Unley
	Adelaide Hills	Charles Sturt	Norwood- Payneham- St Peters
	Eyre Peninsula and South West	Playford	Prospect- Walkerville
	Barossa	Port Adelaide- East	West Torrens
Hobart / Tasmania	Meander Valley- West Tamar	Launceston	
	Sorell- Dodges Ferry	Hobart- North West	
	Hobart- South and West	Burnie- Ulverstone	
	Hobart Inner	Hobart- North East	
	West Coast	Devonport	

EXECUTIVE SUMMARY

1.1

The current supply and distribution of SDA cannot accommodate projected future demand.

Across Australia, **17,500 people** currently live in supported accommodation. The SDA funding under the NDIS is estimated to support **28,000 people**.

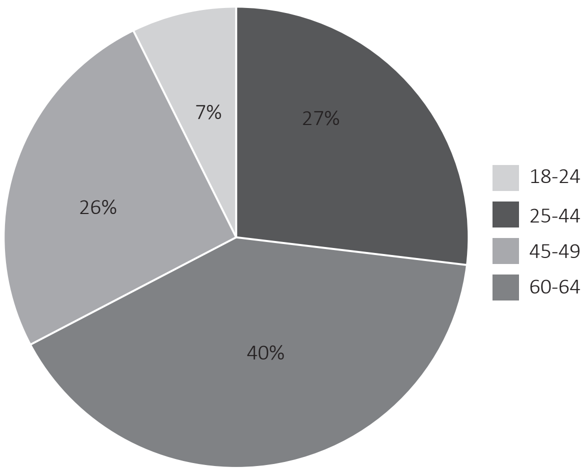
A gap of 10,500 places across Australia exists on the basis of currently supply. The table below shows how this gap is distributed across Australia, by reference to a per capita share.

State	Existing SDA residents	Per capita distribution of SDA	Difference
ACT	210	470	260
NSW	5,730	9,020	3,290
NT	160	280	120
QLD	3,340	5,650	2,310
SA	1,720	1,990	270
TAS	500	600	100
VIC	4,260	7,200	2,940
WA	1,590	2,980	1,390
Total	**17,510**	**28,190**	**10,680**

The majority of current SDA residents live in group homes. **Accessibility, mobility and co-location choices** are some of the key features that need to be considered in future SDA places.

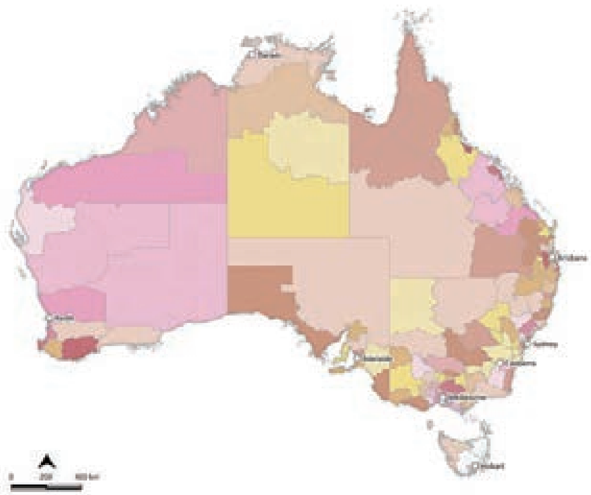
This report estimates that an additional 33,200 people may require SDA on top of the 17,500 already in this form of housing. Of these 33,200 people, 6,200 people are under 64 residing in aged care

Most of the current and potential SDA residents are under the age of 45.



Analysis comparing current SDA supply and potential demand shows there are key hot-spots across Australia.

The analysis indicates there are hotspots of potential demand for new SDA in metropolitan and regional areas.



02 BACKGROUND

ABOUT SPECIALIST DISABILITY ACCOMMODATION

2.1

THE POLICY

SDA is available to those participants of the National Disability Insurance Scheme (NDIS) requiring specialist housing options that cater for their very high support needs and/or their extreme functional impairment.

Funding made available through the SDA policy under the NDIS is designed to give participants choice and control of where, and with whom, they will live with. SDA funding is attached to individuals but paid to the housing provider.

At full Scheme, total funding for SDA is expected to be around $700 million per year

The NDIA estimates that around 6 per cent of total NDIS participants, currently around 28,000 people, will require SDA. Of these, 12,000 people will have access to affordable housing for the first time. This will be a transformational benefit for these recipients given their current living situation is primarily with parents, in hospitals or in residential aged care.

It is estimated an additional 4,000 people will require their existing SDA to be replaced with new stock.

BRIDGING THE YIELD GAP

The policy is designed to deliver annual payments to the housing provider for each occupied SDA dwelling.

The provider receives payment from the NDIS for the provision of the dwelling to the person with approved SDA payments plus reasonable rent contribution from the resident.

HOW ARE THE PAYMENTS MADE?

The SDA payment vary depending on the type of accommodation, its location and particular specifications, as shown in the table below. Per person subsidies currently range from $12,419 to $107,236 p.a.

The reasonable rent contribution by the resident is based on 25% of Disability Support Pension in addition to any Commonwealth Rent Assistance.

SDA payments	
Base price	The base price for each dwelling can be affected by four components: ▪ Type of SDA ▪ Building Type ▪ Design Category ▪ On-site overnight assistance
Types of SDA	SDA dwellings can be categorised as New Builds, Existing Stock or Legacy Stock. The type of SDA will affect the payment made to the provider.
Building Type	This refers to the physical form of the dwelling build. This can range from apartments, villa/duplex/townhouse, house and group homes. Prices for these dwelling types are further disaggregated to capture the number of residents the building type will house.
Design Category	There are five SDA design categories. These rand from a Basic design standard to a High Physical Support standard. The SDA payment differs for each of these design categories.
On-site overnight assistance (OOA)	An additional premium is paid to dwellings that have facilities to provide On-site overnight assistance.
Location factors	The base price of each dwelling is also indexed against a set of predetermined location factors. This primarily offsets any addition build costs that are likely to occur in areas outside of the metropolitan areas.
Fire Sprinklers	Additional allowances are made if the dwelling has fire sprinklers installed. This varies for apartments and all other building types from 1.2%-1.9% respectively.

Source: https://www.ndis.gov.au/medias/documents/hf8/hdf/8802881994782/SDA-Price-Guide-17-18.pdf

DATA AND APPROACH TO ANALYSIS

2.2

DATA SOURCES

This report relies on information from the Australian Institute of Health and Welfare as analysed by the Australian Housing and Urban Research Institute (AHURI) and the Summer Foundation.

Raw data on demand for SDA has been derived from comprehensive administrative records held by state and territory governments regarding users of disability services.

Of particular interest in this report is information regarding service users living in supported accommodation (residential institutions and group homes) and service users who have very high support needs but do not live in supported accommodation.

The data on service users with very high support needs but not living in supported accommodation/ SDA provides insights into the location of people who are likely to seek SDA type housing in the future.

Also of note are service users living in residential aged care aged less than 65. Aged care is not an appropriate housing option for younger people, but over 6,000 younger people with high and complex disability support needs live in residential aged care due to lack of alternative suitable accommodation.

MEASURING SUPPLY AND DEMAND

For the purposes of this report, the count of people living in existing supported accommodation is taken as a measure of current SDA supply in any given location.

The report compares the current distribution of these places with a national benchmark for provision (based on places per capita) to identify areas where there are likely SDA supply shortfalls.

The report also explores the quantum and geography of demand for SDA places by analysing the location of people with very high support needs not living in SDA and people living in residential aged care. These people represent strong potential demand for new SDA places, assuming their current housing situation does not reflect their preferred living arrangement. For example, many people with high support needs are living with ageing parents who cannot continue to care for their adult children.

INVESTMENT OPPORTUNITIES

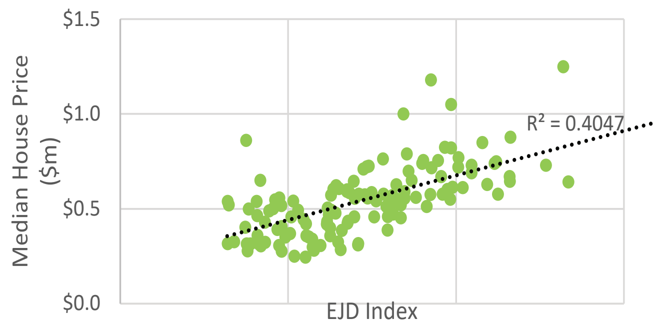
As well as providing a much needed service for people with disabilities, the subsidy streams available under the SDA program offer the potential for secure financial returns for institutional and other investors.

Investors will be interested in those areas which display both high SDA demand and sound prospects of stable or growing property value.

The Effective Job Density (EJD) of an area is a reliable predictor of current and future property value. It is a measure of relative access to jobs across a region. This, in turn, reflects relative access to retail, health, education, recreational and other opportunities, which is a driver of property values (see the Brisbane example below).

This study relates areas of high SDA need to areas with high EJD to highlight areas that might be targeted by particular groups of investors.

House prices vs EJD in metropolitan Brisbane



NATIONAL OVERVIEW

2.3

Across Australia, **17,500** people are currently living in Supported Disability Accommodation.

An additional **33,200** people have been identified with high support needs, with the potential to qualify for SDA payments. This group consists of:

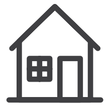
- 6,200 people aged under 64 and with very high support needs living in aged care, and
- 27,000 people with very high support needs not currently living in SDA or aged care.

The majority of the people not currently in SDA or aged care (75%) is living at home, two-thirds with family (many with ageing parents or other family carers). Two thirds are under 45 years of age. It is expected that these people will continue to receive disability support services through the NDIS and many will seek more appropriate accommodation, given more flexible support provided under the NDIS.

Similarly, many of the group currently living in aged care would be expected to seek more appropriate accommodation under the NDIS.

The following shows where current and potential users of specialist disability accommodation were residing in 2017.

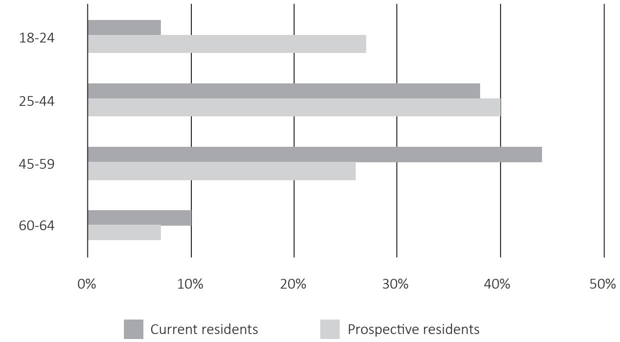
9% in large institutions



5% in small residential institution

87% in group homes

The graph below shows most people currently living in SDA are aged between 25-59, with a median age of 46 .



There is a much younger age profile of people potentially seeking SDA in the future (median age of 34).

03 LOCATIONS WITH SDA UNDERSUPPLY

LOCATIONS WITH SDA UNDERSUPPLY

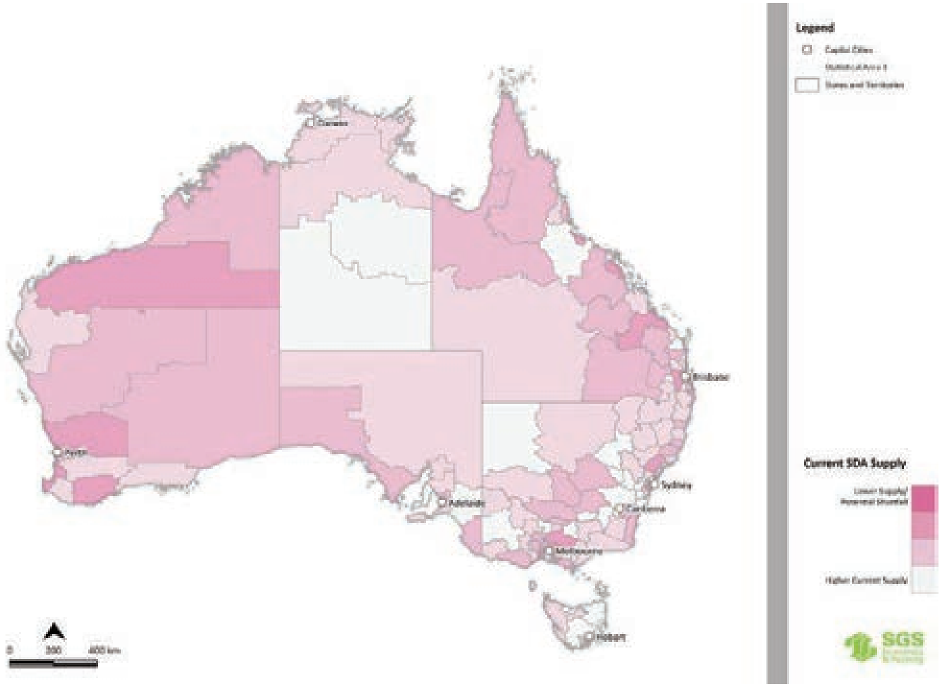
3.1

When the NDIS is fullyrolled out and there are 28,000 SDA places funded, this would equate to one SDA place per 857 people (general population).

The 1:857 ratio can be used to highlight locations of clear undersupply of SDA places across Australia (noting that “current supply” reflects historic decisions about provision of supported accommdation by governments).

The map shows there are varying degrees of *current* supply (by total number) across the country. Areas with deeper shading indicate likely shortfalls in future supply based on the current distribution of SDA.

On this index, metropolitan areas within NSW, VIC and QLD have the greatest shortage of SDA. The table provides data by jurisdiction highlighting those with large shortfalls in SDA supply.



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Total	**17,510**	**28,190**	**10,680**

SYDNEY AND NEW SOUTH WALES

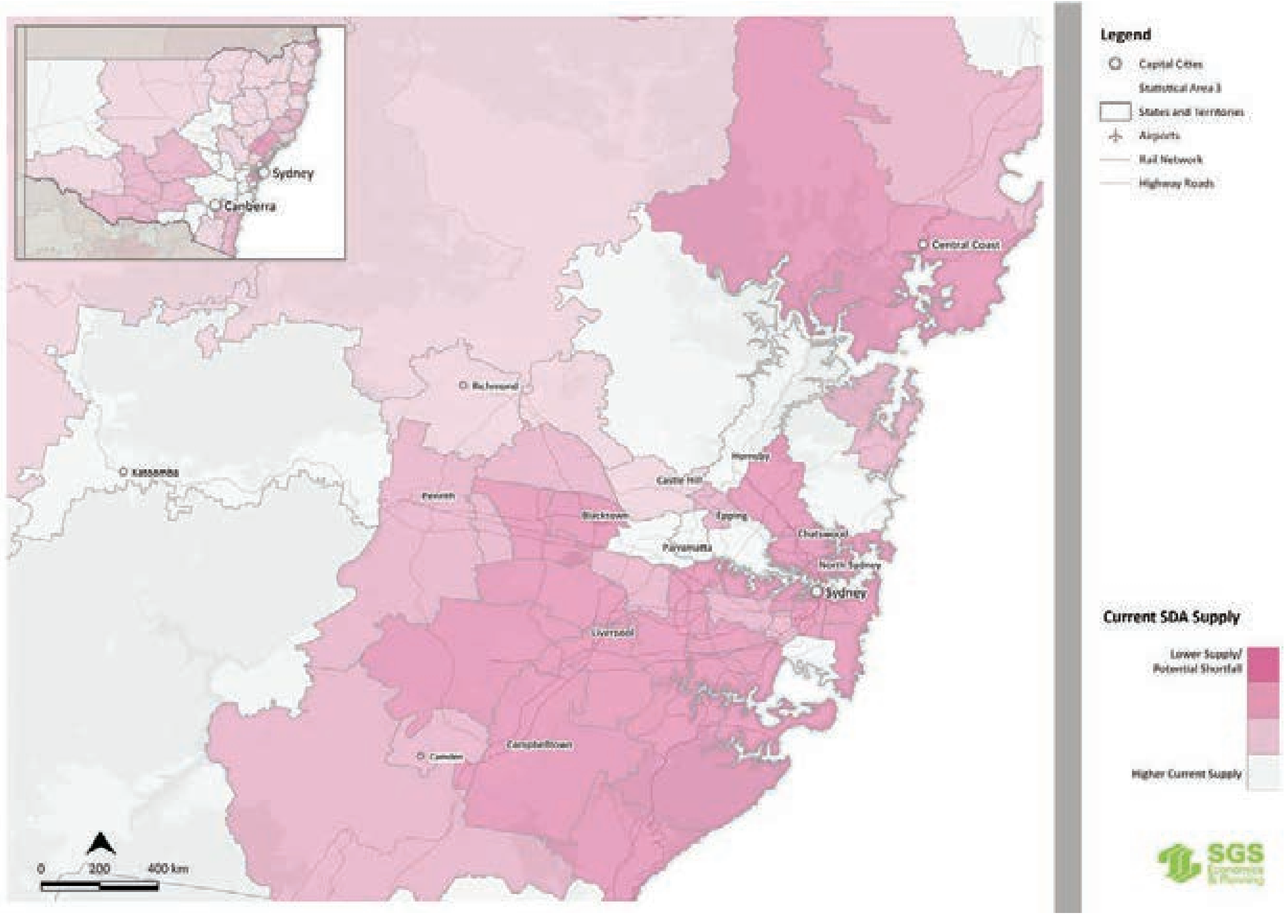
3.2

Greater Sydney has an under-provision of SDA compared to the regional areas of NSW.

In particular, the inner ring of Sydney has the greatest shortfalls of SDA provision. These areas would require the most investment in SDA to return them to the national average.

The top five districts within NSW for shortfalls in SDA provision are shown in the table below.

	Undersupply (no. of places)
Sydney inner City	254
Fairfield	162
Eastern Suburbs- North	154
Gosford	148
Kogarah- Rockdale	125



MELBOURNE AND VICTORIA

3.3

Inner Melbourne has greater under-provision of SDA compared to regional Victoria.

Like NSW, the metropolitan areas of Victoria have the highest shortfalls of SDA supply compared to the national per capita average.

The top five shortfall districts within Victoria are shown in the table below.

	Undersupply (no. of places)
Wyndham	247
Geelong	204
Casey- South	172
Tullamarine-Broadmeadows	170
Melbourne City	167

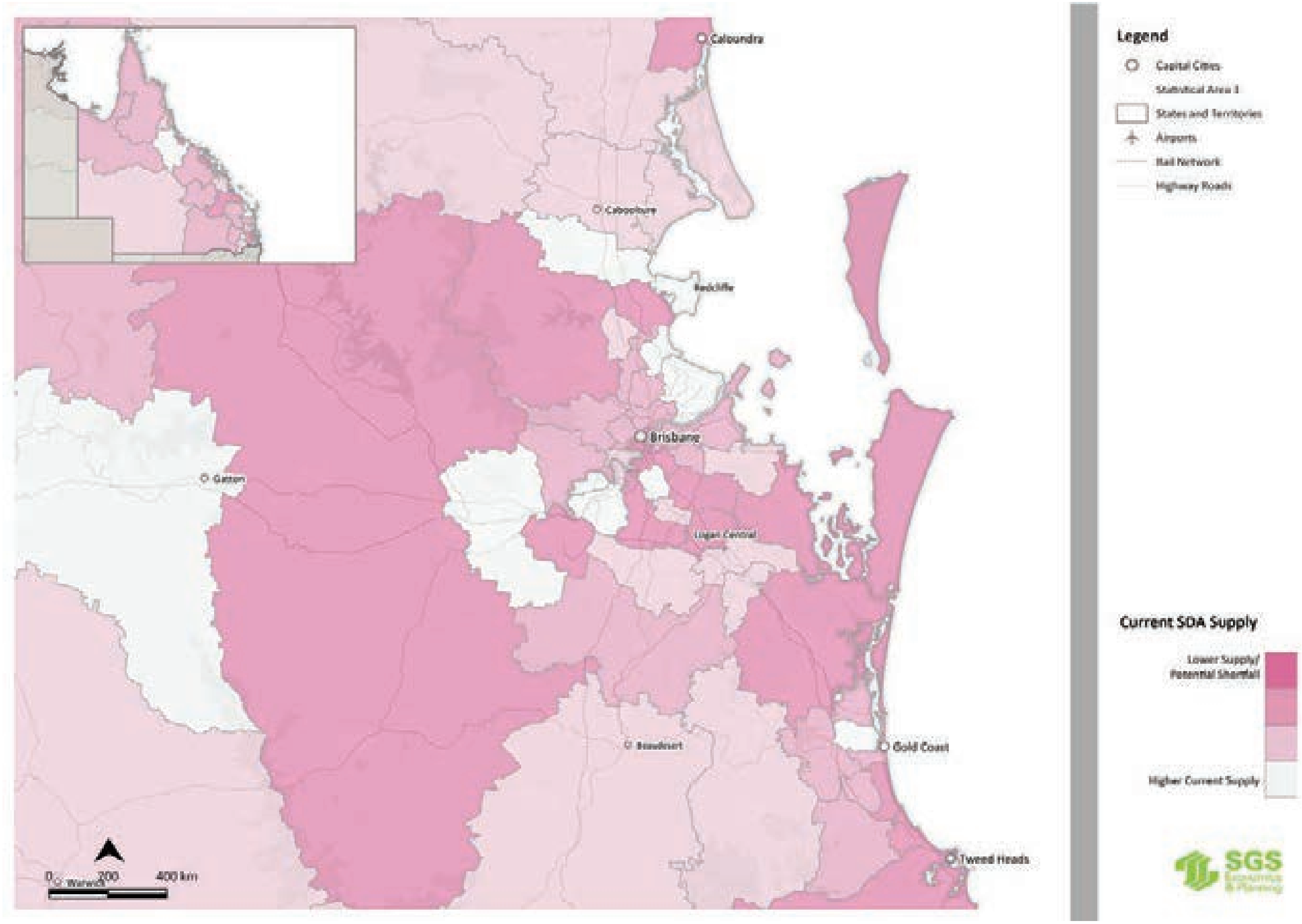
BRISBANE AND QUEENSLAND

3.4

The outer districts of South East Queensland have greater shortfalls of SDA compared to metropolitan Brisbane.

The top five districts within Queensland for SDA shortfalls are shown in the table below.

	Undersupply (no. of places)
Hills District	87
Ormeau- Oxenford	80
Townsville	77
Brisbane Inner	76
Ipswich Hinterland	71



ADELAIDE AND SOUTH AUSTRALIA

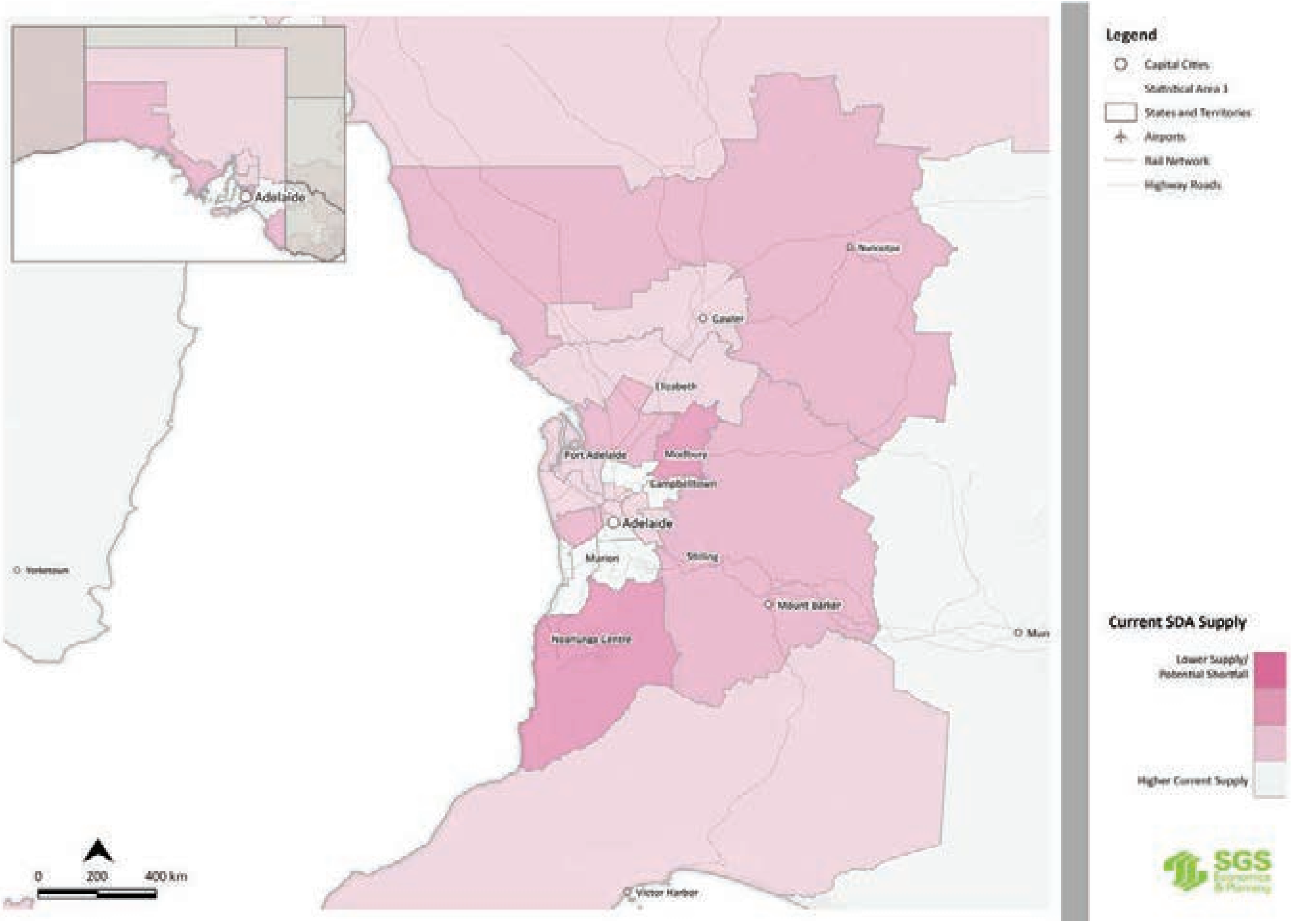
3.5

The inner metropolitan areas of Adelaide have a relatively even distribution of SDA in line with the national provision ratio.

Outer metro areas and regional South Australia have the lowest provision of SDA.

The top five districts for SDA shortfalls are shown in the table below.

	Undersupply (no. of places)
Onkaparinga	113
Tea Tree Gully	76
Adelaide Hills	51
Eyre Peninsula and South West	45
Barossa	37



HOBART AND TASMANIA

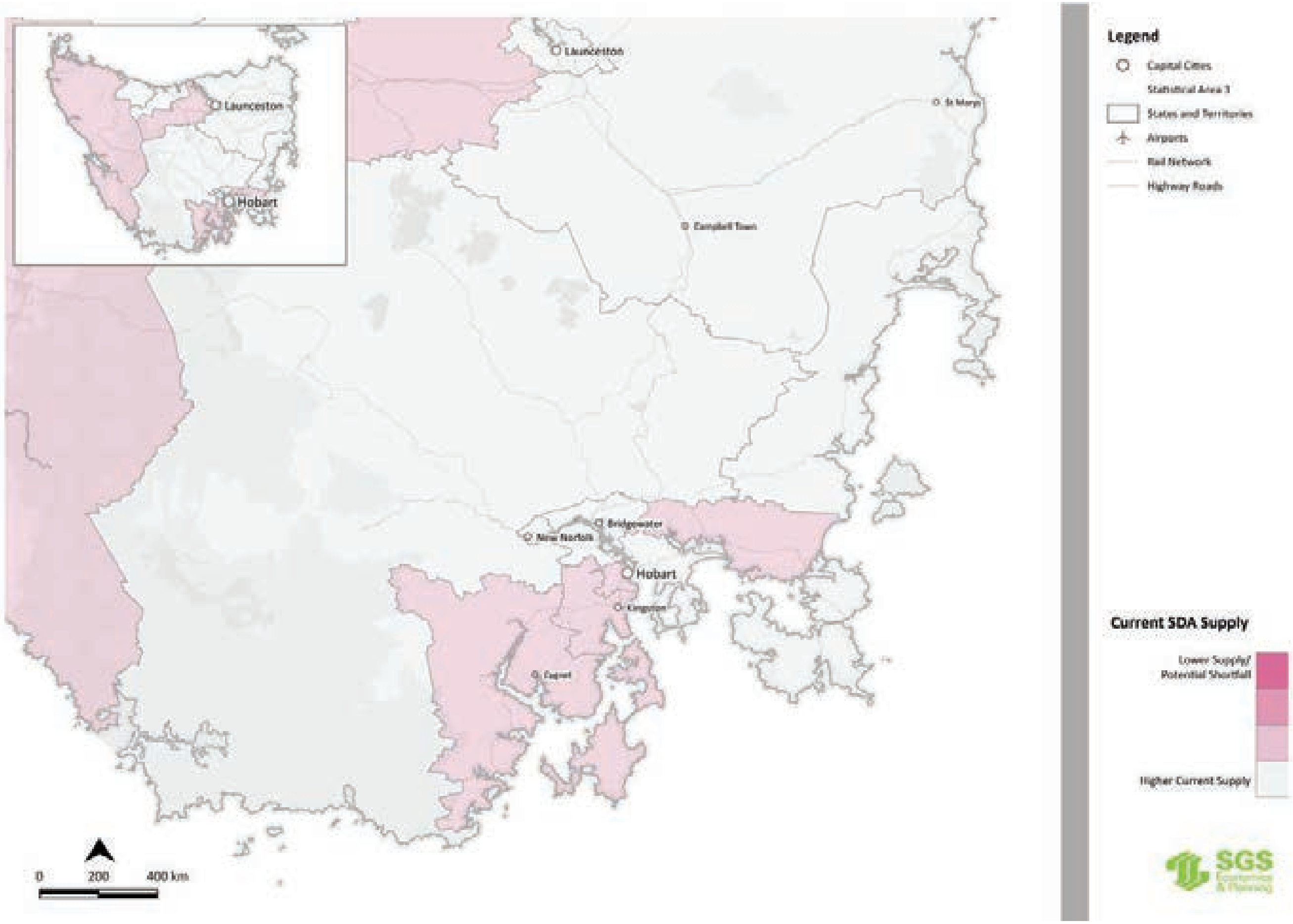
3.6

Tasmania is relatively well provisioned with SDA dwellings compared to other states.

The primary areas that require additional dwellings are concentrated in the south east and on the north west coast of the state.

The five districts with the greatest shortfalls of SDA provision shown in the table below.

	Undersupply (no. of places)
Meander Valley- West Tamar	22
Sorell- Dodges Ferry	19
Hobart- South and West	18
Hobart Inner	17
West Coast	16



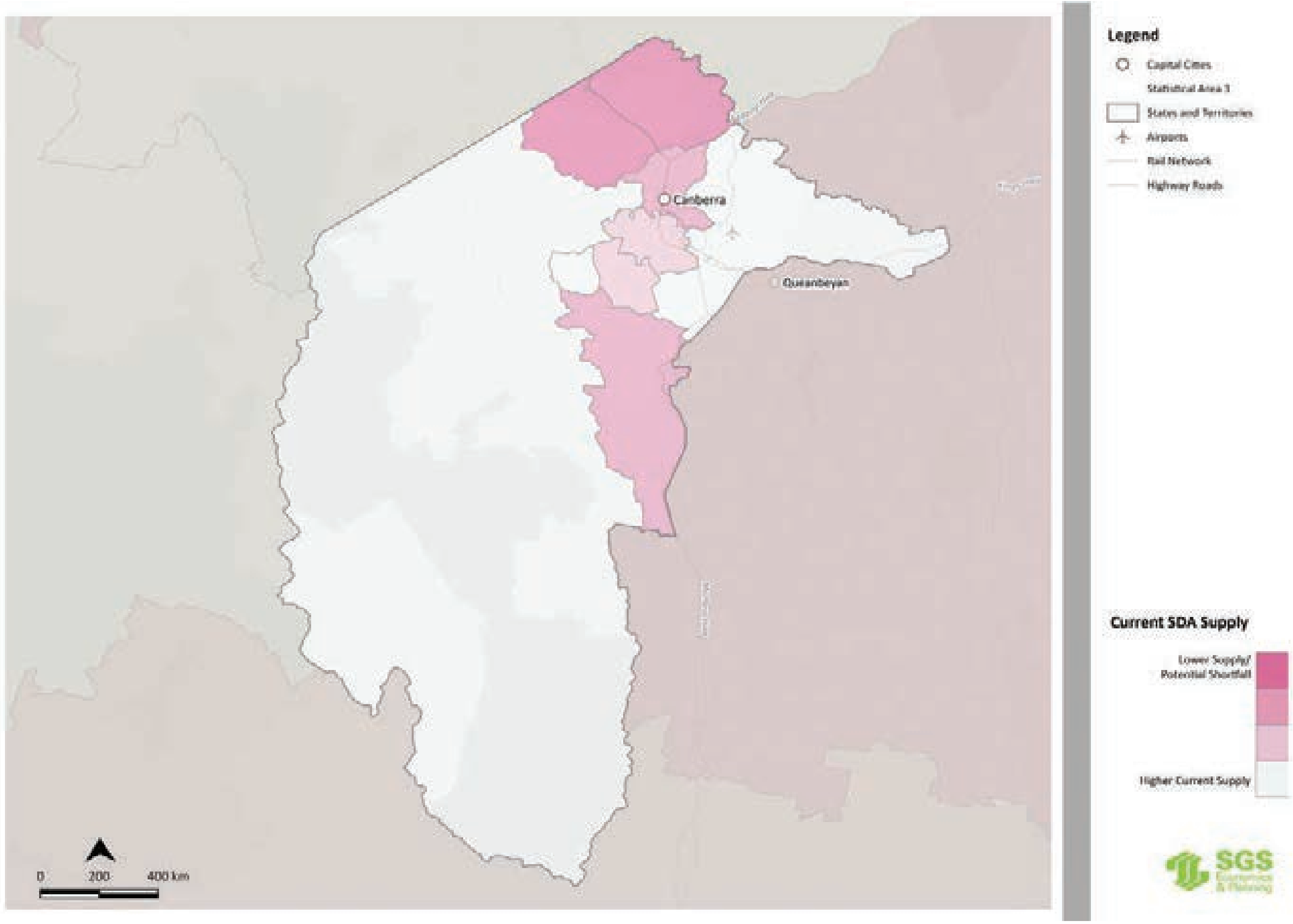
CANBERRA AND THE AUSTRALIA CAPITAL TERRITORY

3.7

The northern districts of the ACT have a higher shortage of SDA compared to the south of the Capital.

The five districts with the greatest shortfalls of SDA provision shown in the table below.

	Undersupply (no. of places)
Belconnen	77
Gungahlin	62
Tuggeranong	43
North Canberra	30
South Canberra	22



DARWIN AND THE NORTHERN TERRITORY

3.8

The Northern Territory is relatively well provisioned with SDA dwellings compared to the national average.

The five districts with the greatest shortfalls of SDA provision shown in the table below.

	Undersupply (no. of places)
Darwin City	33
Palmerston	27
Litchfield	24
Daly- Tiwi- West Arnhem	21
East Arnhem	17

04 DISTRIBUTION OF POTENTIAL SDA DEMAND

DISTRIBUTION OF POTENTIAL SDA DEMAND

4.1

Comparing current provision of SDA in each area with the national average provides one insight to those parts of Australia in need of investment in this form of housing.

However, data analysis shows that the need for SDA is not proportionally distributed across the country. Rather there are areas of concentrated demand.

Analysing the spatial distribution of people who might seek SDA in the future provides further insight as to where investment in this form of housing might be best deployed.

This section focusses on the distribution of estimated demand for SDA as indicated by the number of potential NDIS participants aged between 18-64 years currently living in residential aged care plus people who have very high disability support needs and not living in supported accommodation.

CURRENT SUPPLY VERSUS POTENTIAL DEMAND

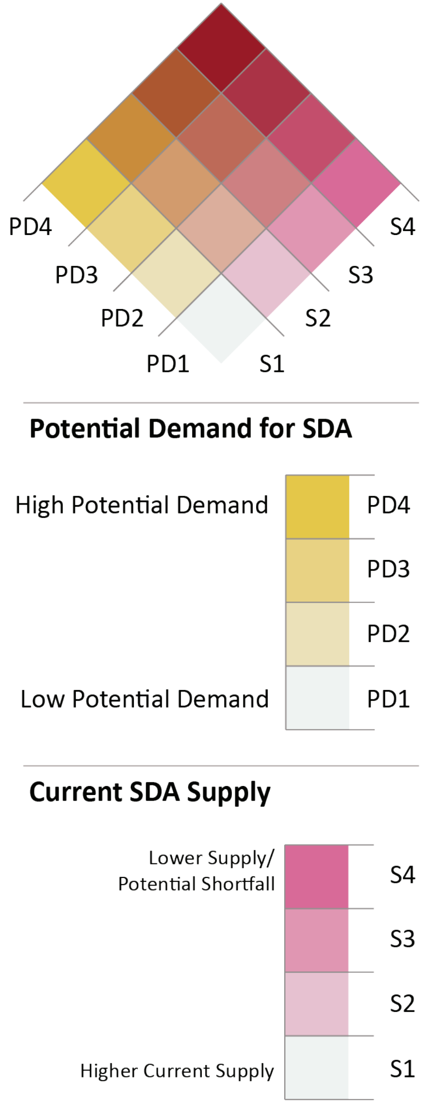
The following maps overlay the index of relative under-provision of SDA , as identified by reference to national benchmarks (Section 3) with the measured distribution of potential demand for SDA housing.

The dark yellow areas show areas of high potential SDA demand.

The dark pink areas have low SDA supply compared to the national benchmark.

Amongst other things, combining these indices highlights areas of both very low relative supply and very high demand (shown in dark red). These could be key target areas for SDA investment.

In interpreting these maps, it should be noted that people with high needs who are currently not in supported accommodation are not guaranteed access to SDA payments. For a more accurate picture of actual demand, data on the success rate of receiving an SDA payment is required from the NDIA.



SYDNEY AND NEW SOUTH WALES

4.2

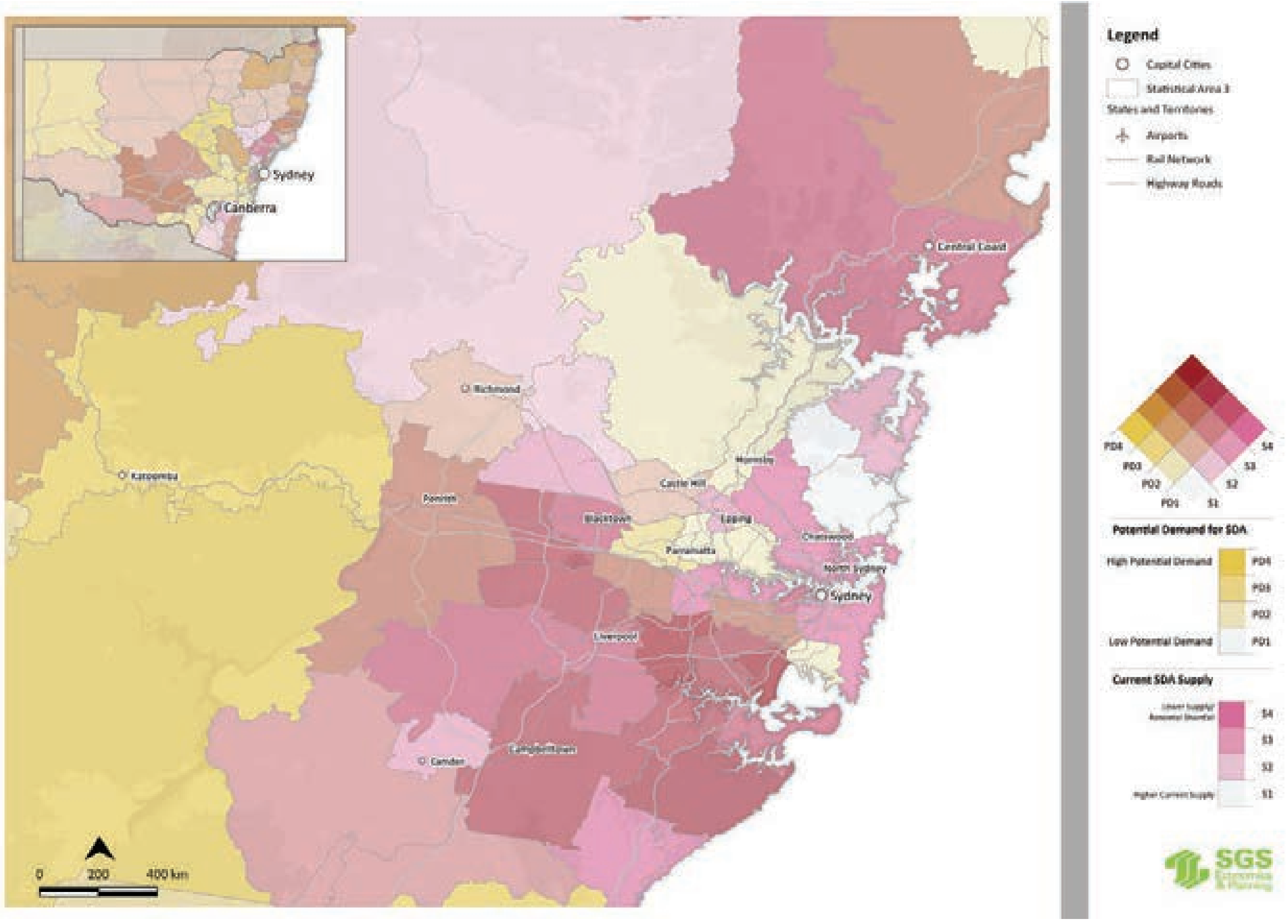
In Sydney, the areas that have both high potential demand and low supply are primarily across the south west of the metropolitan area.

These areas include the following:

- Fairfield
- Kogarah – Rockdale
- Bankstown
- Mount Druitt
- Hurstville

Outside of the greater Sydney catchment, notable high demand and low supply areas include:

- Wagga Wagga
- Griffith – Murrumbidgee (West)
- Taree – Gloucester
- Port Macquarie
- Coffs Harbour



MELBOURNE AND VICTORIA

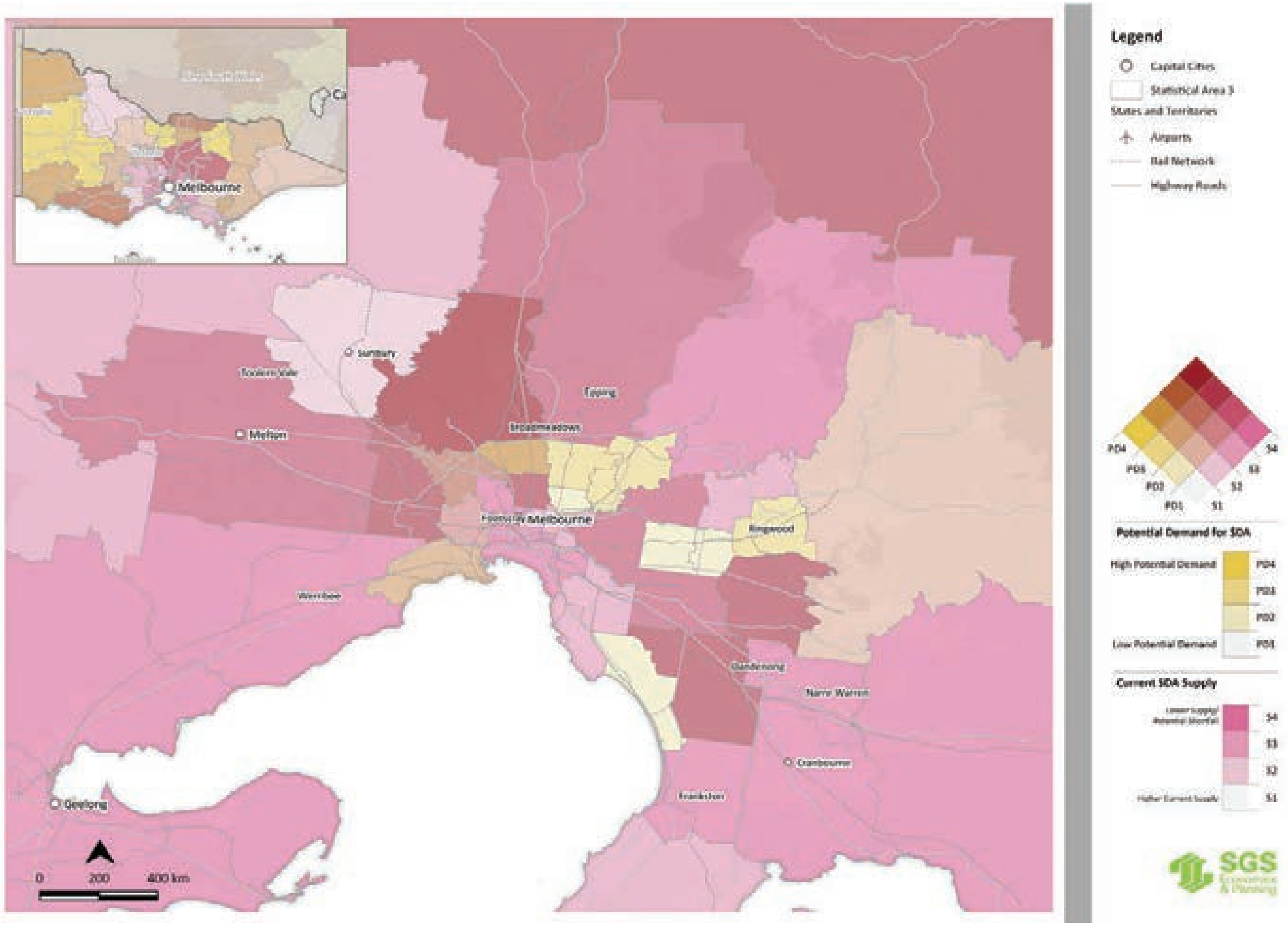
4.3

In Victoria, regional areas to the west of Melbourne have a much higher need for SDA investment based on the intersection of the two prioritisation indices compared to the rest of the state.

Notable areas with high potential demand as well as low relative supply include:

- Tullamarine- Broadmeadows
- Dandenong
- Brimbank
- Knox
- Upper Goulburn Valley.

New SDA investments into these areas are likely to have a lower vacancy risk.



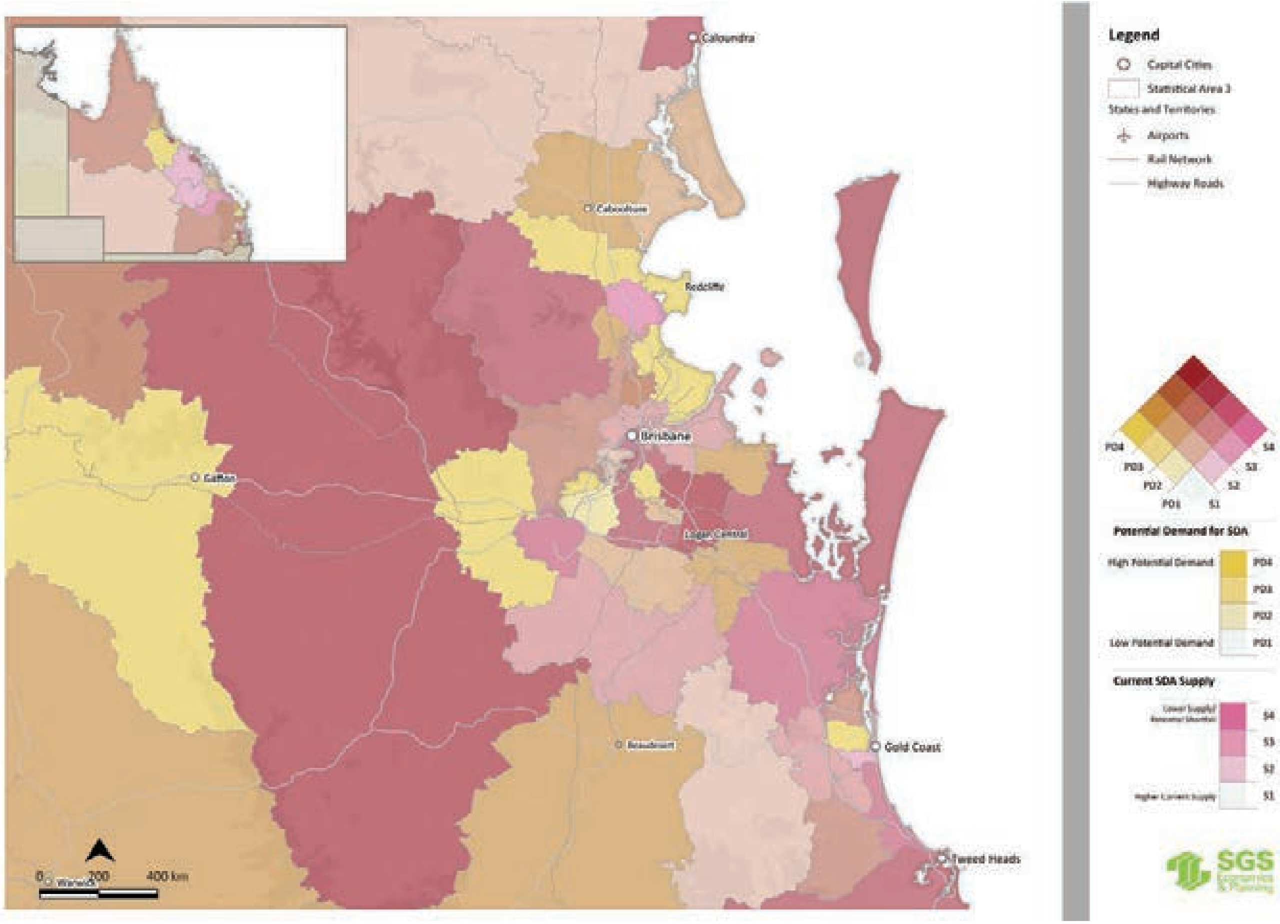
BRISBANE AND QUEENSLAND

4.4

Within Brisbane, the crossover of the two indices highlight key pockets in the city to be prioritised. The inner metropolitan areas of Brisbane have relatively low potential demand compared to these peri-urban and regional districts.

Priority areas based on the combination of estimated demand and current supply include:

- Springwood- Kingston
- Ipswich Hinterland
- Townsville
- Mt Gravatt
- Mackay



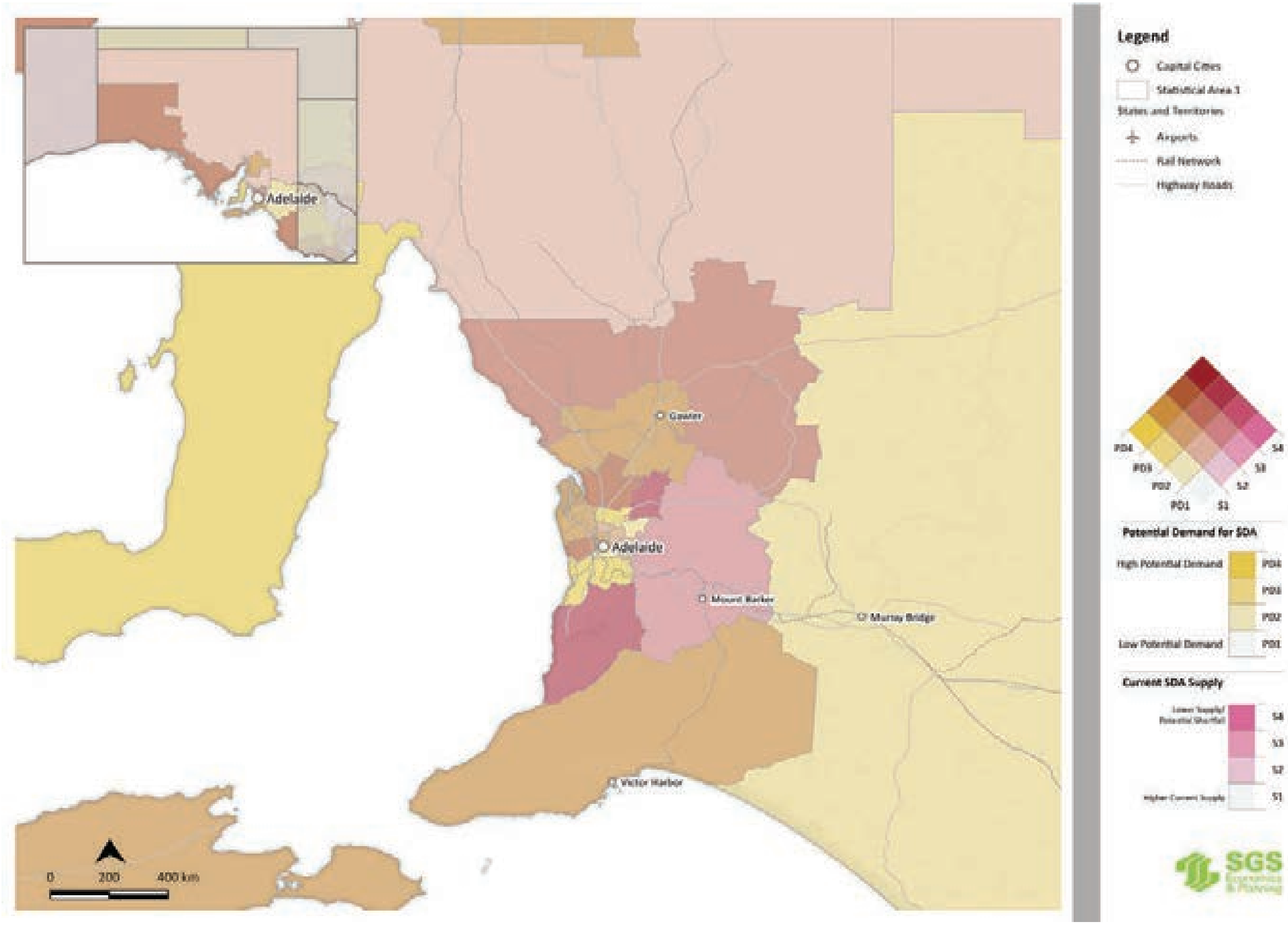
ADELAIDE AND SOUTH AUSTRALIA

4.5

In South Australia, metropolitan areas tend to have the highest demand and the lowest supply of SDA.

The most notable areas to be prioritised include:

- Salisbury
- Onkaparinga
- Charles Sturt
- Playford
- Port Adelaide – East



HOBART AND TASMANIA

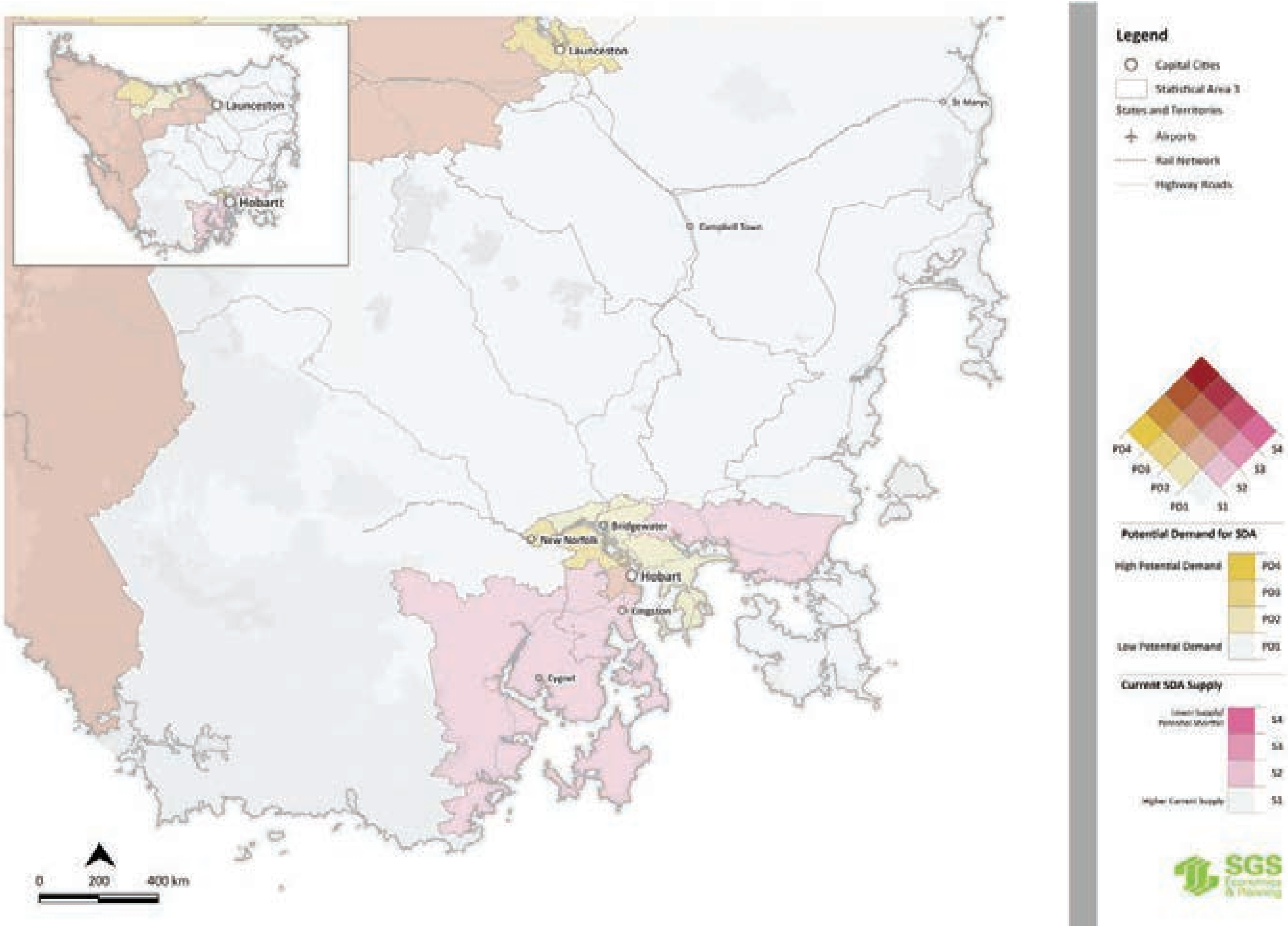
4.6

Most districts in Tasmania are characterised by relatively low levels of potential demand for SDA dwellings combined with a relatively high existing supply.

The areas with the highest potential demand are:

- Launceston
- Hobart – North West
- Burnie – Ulverstone
- Hobart – North East
- Devonport

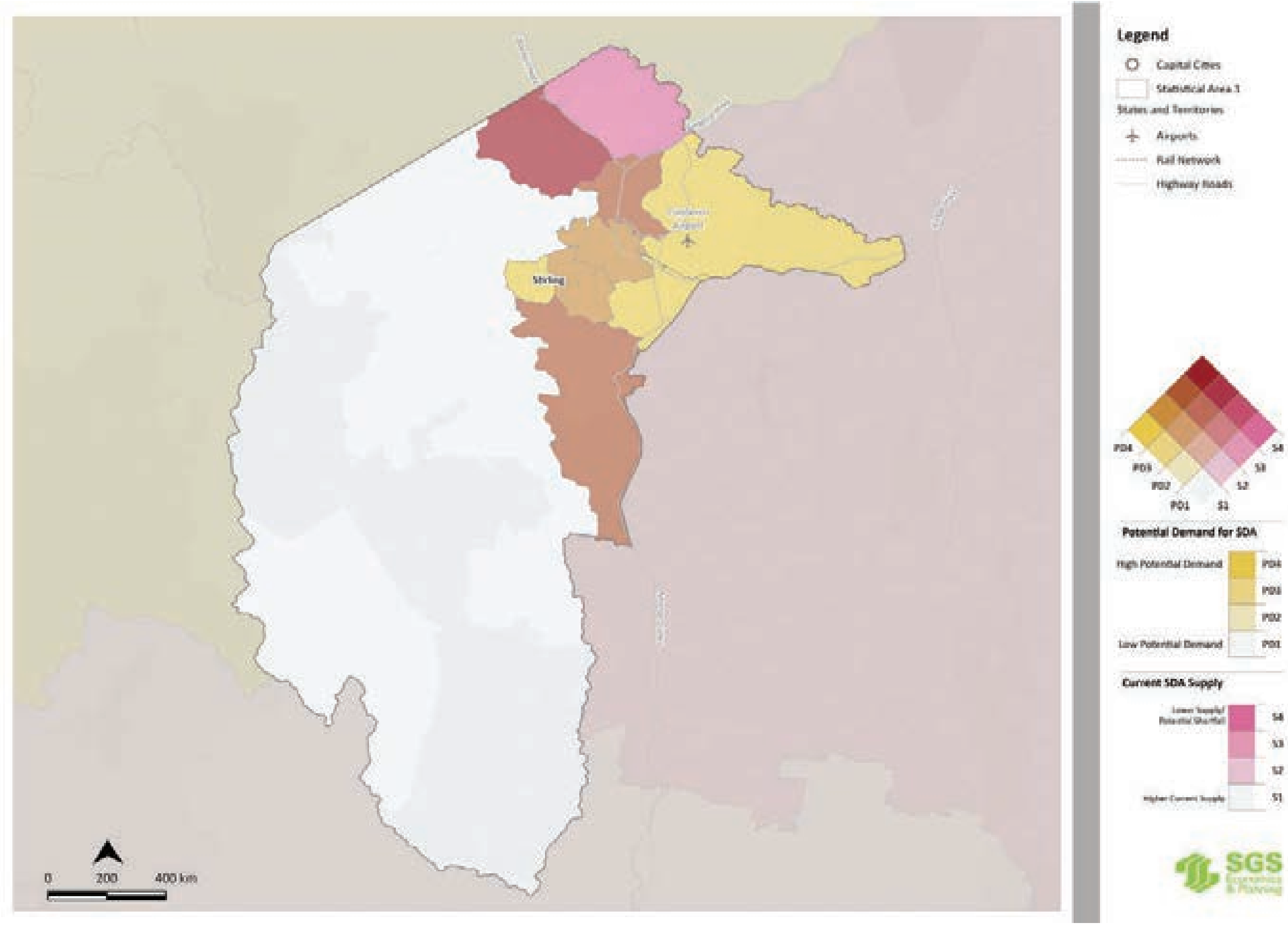
Investment in SDA in Tasmania will need to be carefully targeted to manage vacancy risk.



CANBERRA AND THE AUSTRALIAN CAPITAL TERRITORY

4.7

Across the ACT, all regions have high need (except Gungahlin and Cotter – Namadgi). The two areas with the highest potential demand are Weston Creek and Canberra East.



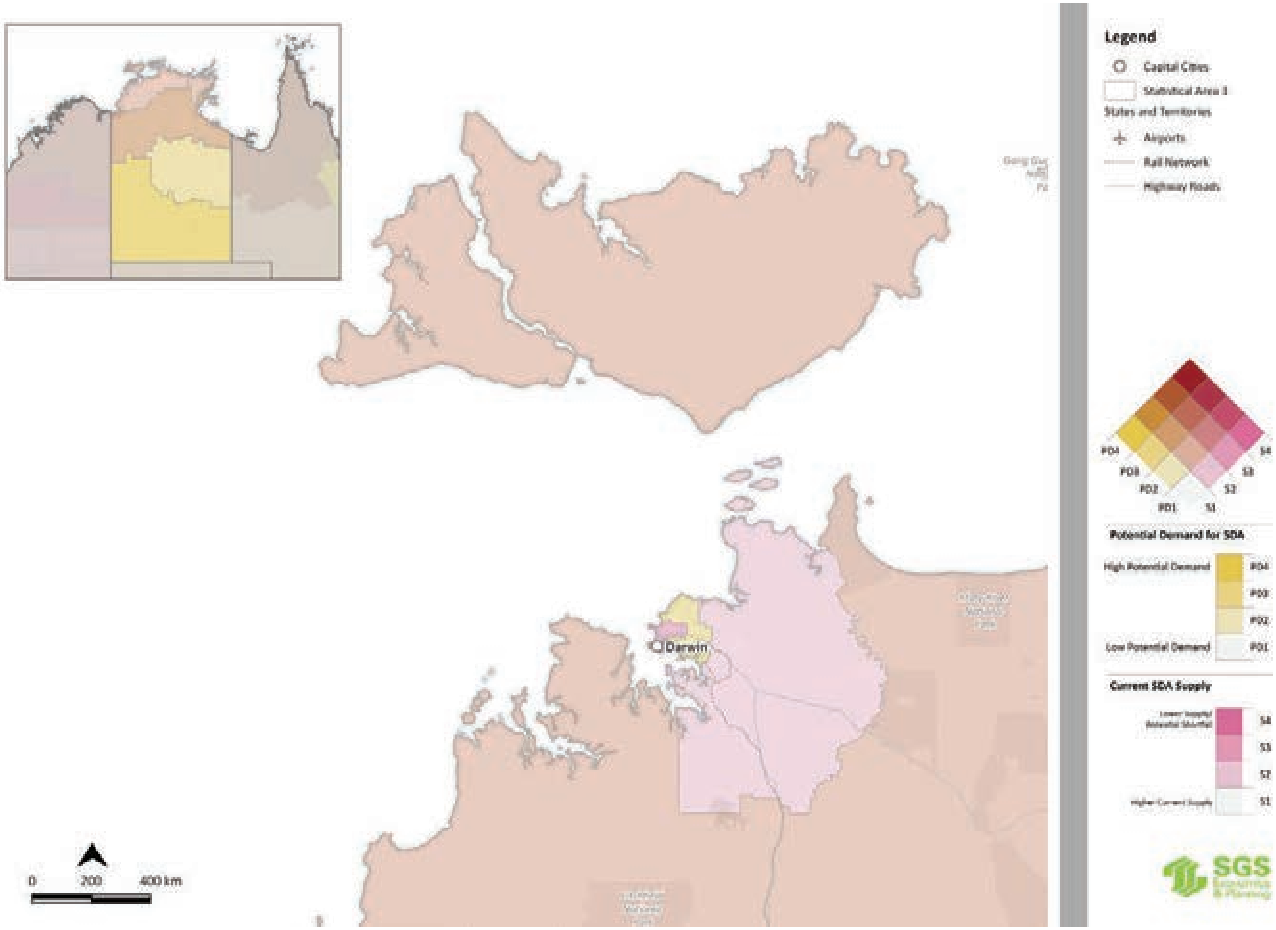
DARWIN AND THE NORTHERN TERRITORY

4.8

The remote areas of the Northern Territory have the highest potential demand for SDA.

The areas with the highest potential demand are:

- Alice Springs
- Katherine
- Barkly
- Darwin Suburbs
- Daly – Tiwi – West Arnhem



05 INVESTING IN SDA

INVESTING IN SDA

5.1

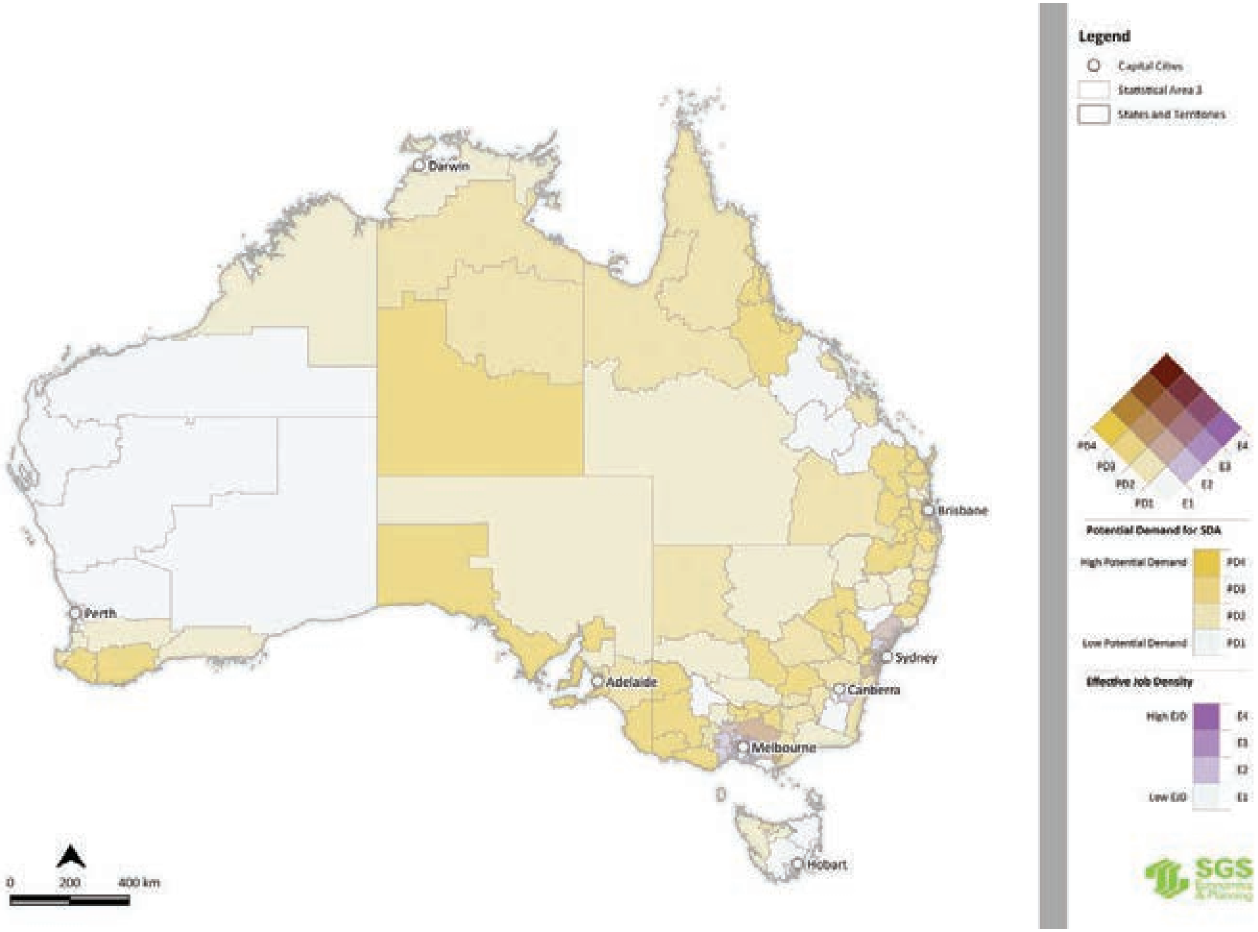
Investors mobilised by the NDIS subsidies for SDA will come from both the not-for-profit and commercial sectors. To varying degrees, both these groups will have an eye to the financial performance of these investments, including the prospects of sound capital growth.

This section brings together the index of SDA need derived from the AHURI analysis with an index of underlying strength in the property market – Effective Job Density (EJD). EJD captures the centrality of a location which is often the determining factor in property values.

EJD captures the centrality of a location which is often the determining factor in property values.

It is a measure of relative access to jobs across a region. This, in turn, reflects relative access to retail, health, education, recreational and other opportunities, which is a driver of property values.

Areas showing high potential demand for SDA as well as strong market growth, as indicated by high EJD, will be of interest to commercially focussed SDA investors.



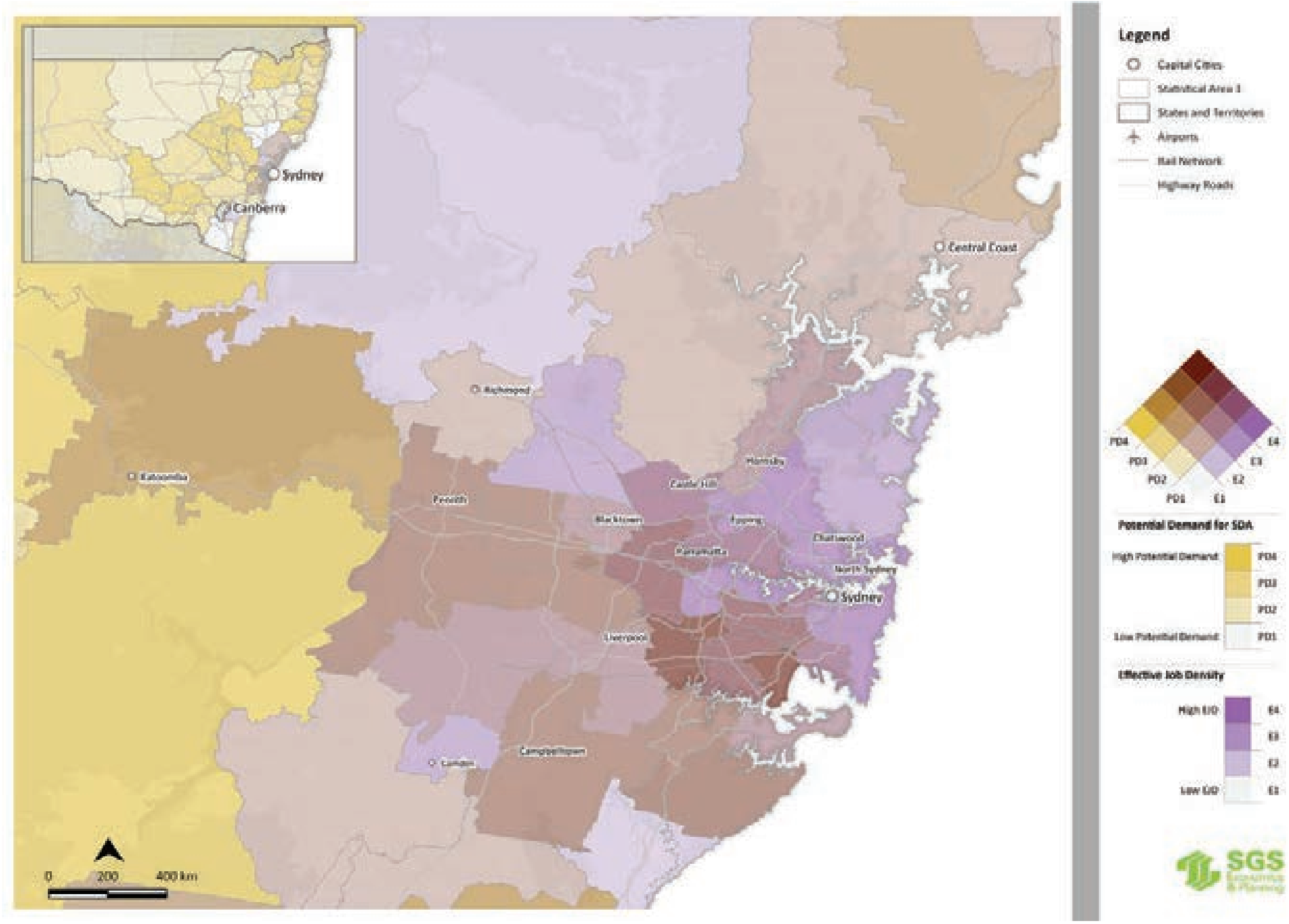
SYDNEY AND NEW SOUTH WALES

5.2

Greater Sydney's south west districts have relatively high EJD as well high potential demand. These are areas that would have the strongest investment potential whilst also addressing potential SDA needs.

Key areas of high EJD and strong potential demand are:

- Marrickville – Sydenham – Petersham
- Strathfield – Burwood – Ashfield
- Kogarah – Rockdale
- Canterbury
- Parramatta

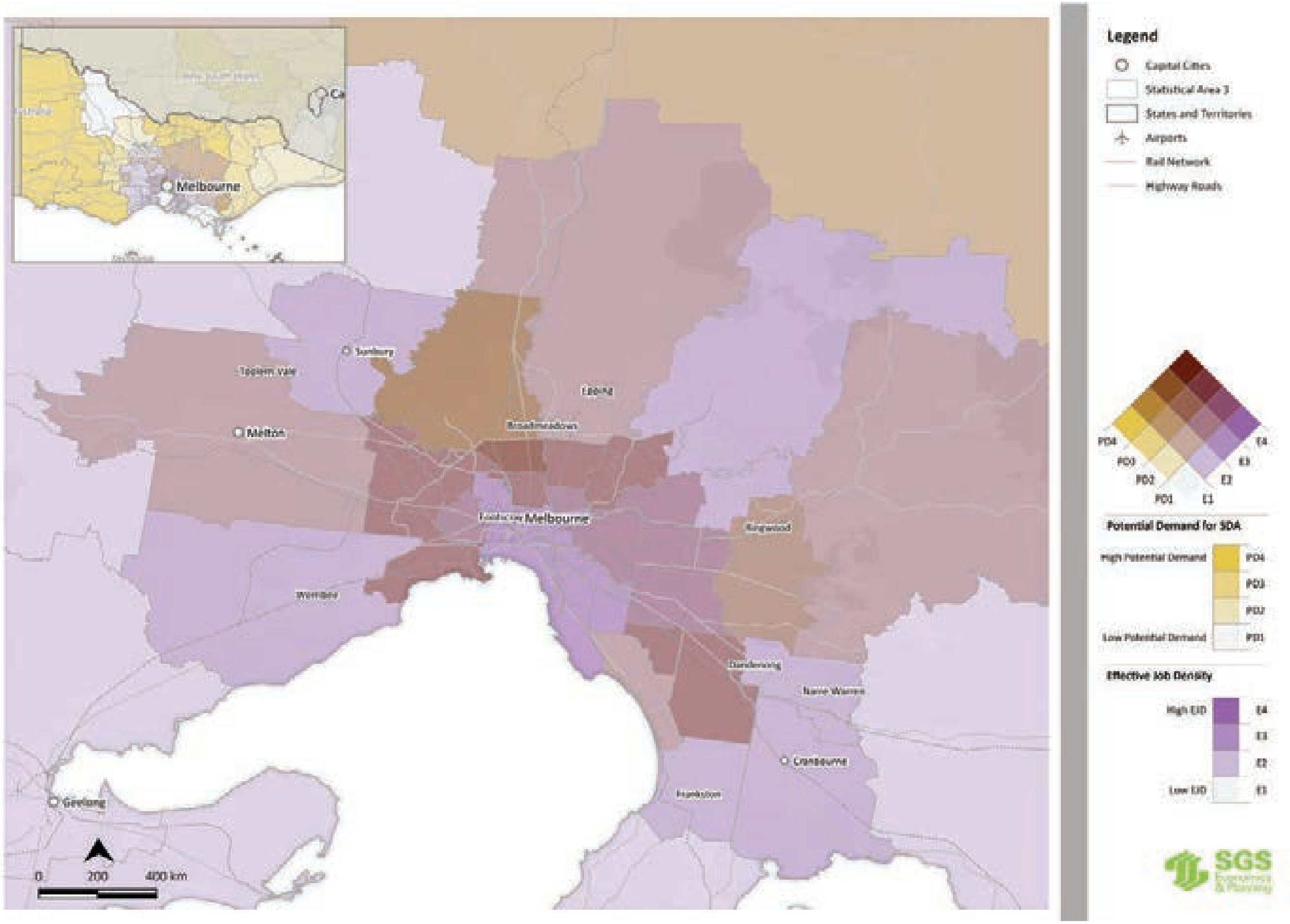


MELBOURNE AND VICTORIA

The outer districts within metropolitan Melbourne have strong potential demand and high potential commercial returns.

Notable areas with high EJD and strong potential demand include:

- Tullamarine- Broadmeadows
- Brunswick- Coburg
- Moreland – North
- Keilor
- Darebin – North



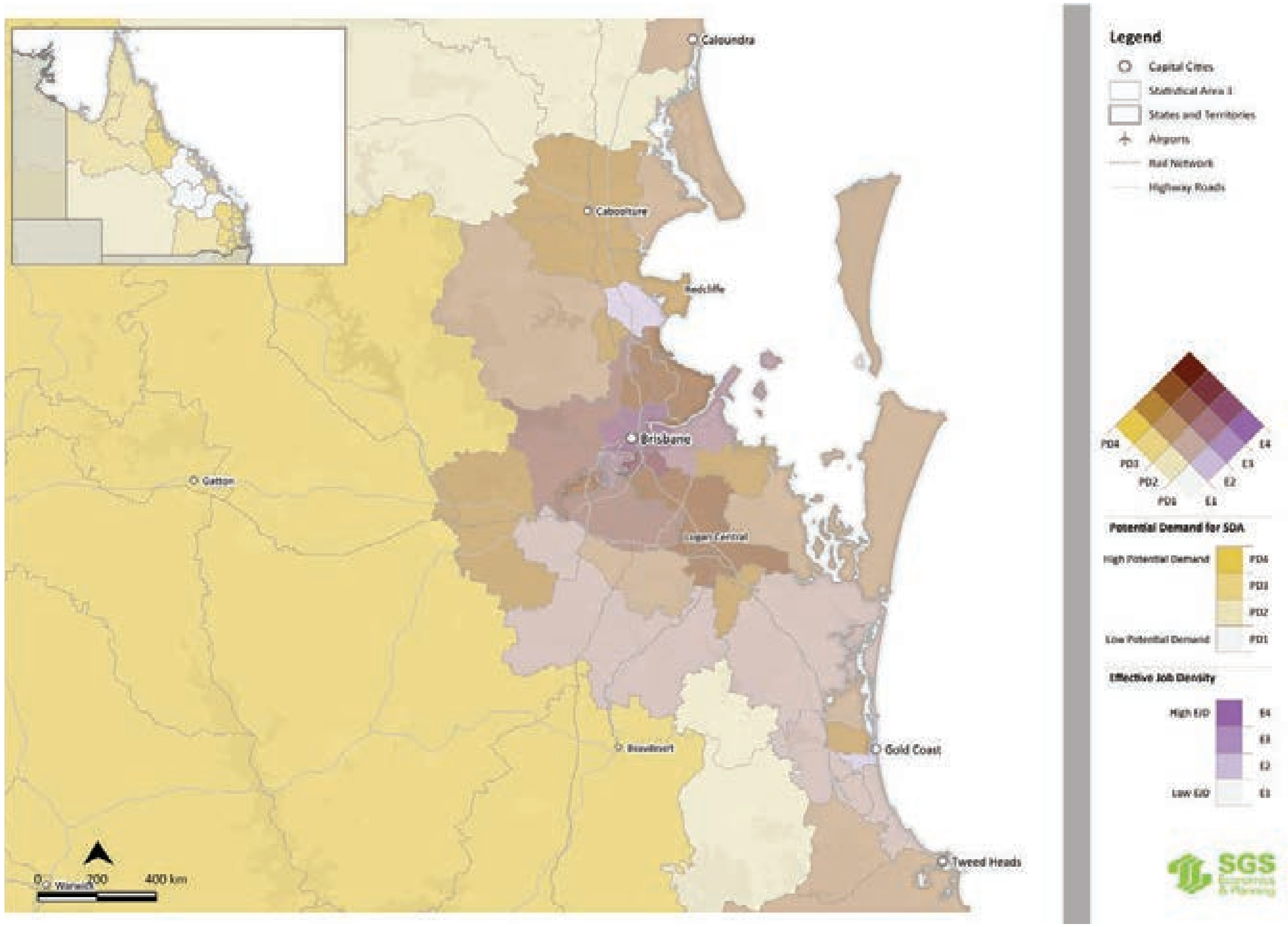
BRISBANE AND QUEENSLAND

5.4

The intersection of both strong potential demand for SDA and strong commercial returns highlights the outer districts of metropolitan Brisbane and districts in and around the Gold Coast.

Noteworthy areas showing high scores on both EJD and demand are:

- Holland Park – Yeronga
- Nathan
- Chermside
- Mt Gravatt
- Nundah



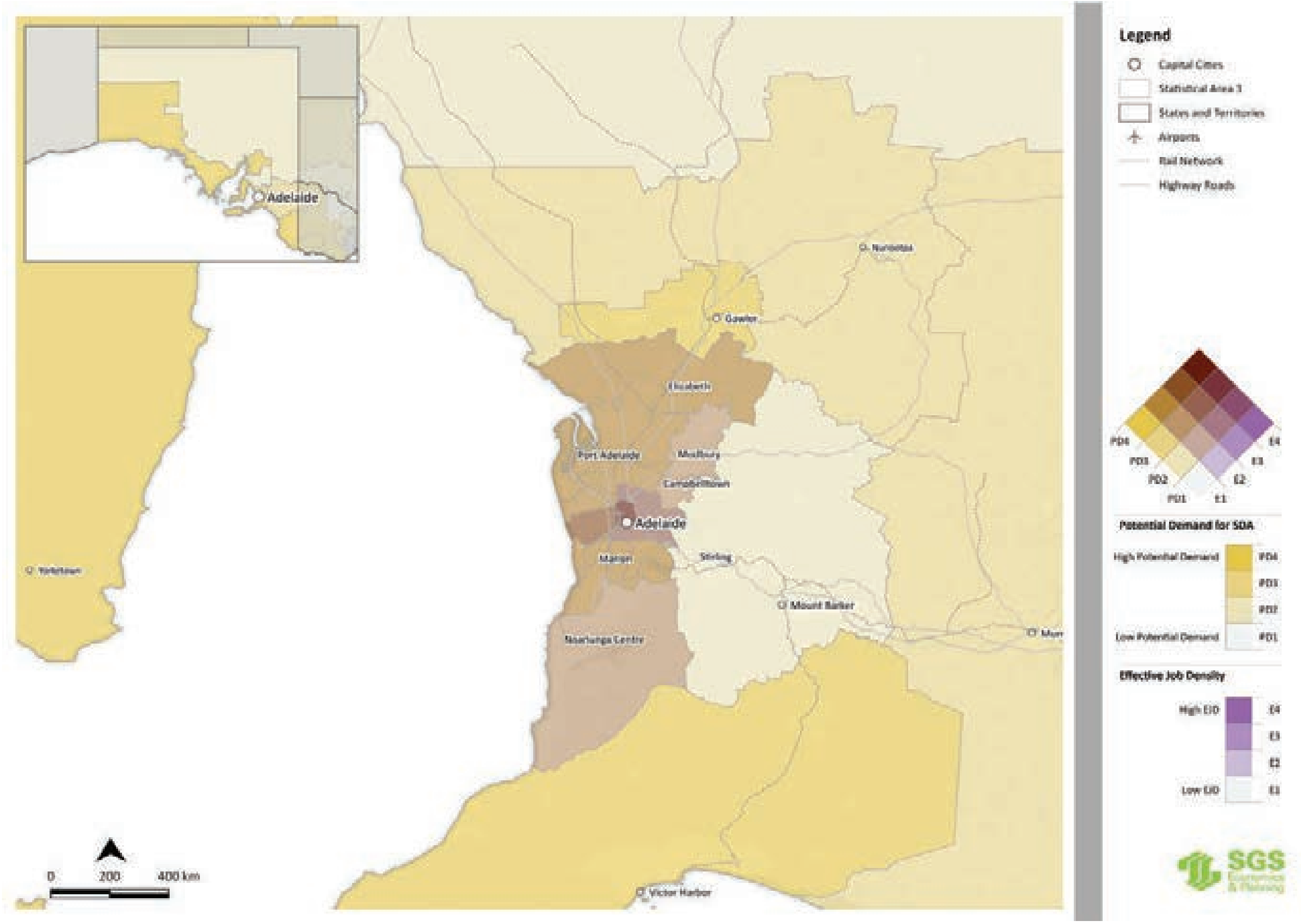
ADELAIDE AND SOUTH AUSTRALIA

5.5

Inner city Adelaide shows highest potential demand for SDA coupled with the strongest commercial potential.

The most notable areas with the highest EJD and strong potential demand are:

- Adelaide City
- Unley
- Norwood – Payneham – St Peters
- Prospect – Walkerville
- West Torrens

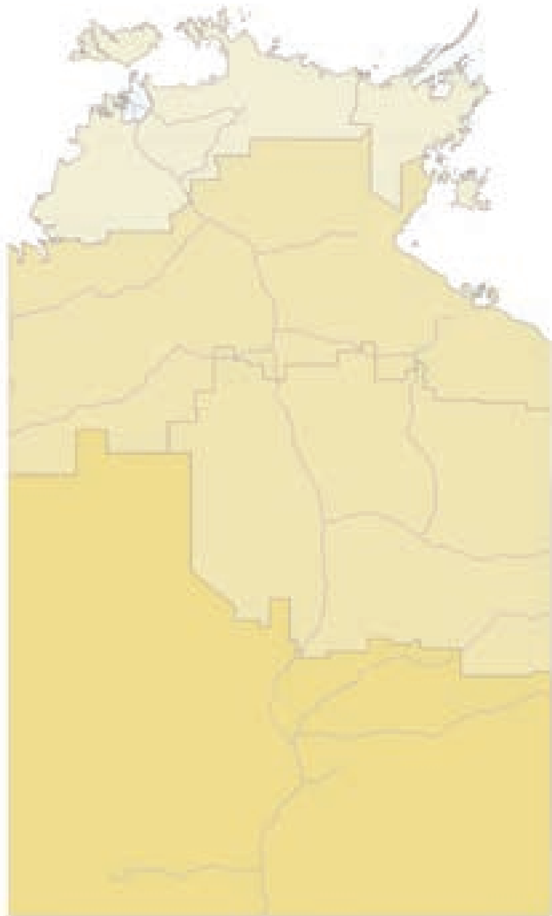


TASMANIA, THE NORTHERN TERRITORY AND ACT

5.6

Tasmania, the Northern Territory and the Australian Capital Territory generally have lower levels of EJD reflecting relatively small cities in each of these jurisdictions.

Accordingly, the measure of potential demand for SDA is likely to be the more reliable indicator for preferred SDA investment areas in these states and territories.



06 HOUSING PREFERENCES

HOUSING PREFERENCES

6.1

The SDA policy is designed to ensure individuals have greater choice in where they live, with whom they live and the type of house they live in. Currently, many potential SDA participants have no choice but to live in accommodation that is poorly aligned to their preferences. Providers of, and investors in, SDA will need to understand the housing preference profile of participants.

In 2017, the Summer Foundation held workshops and conducted in-depth interviews with a sample of people with high support needs living in a variety of situations around Australia.

Sixty-nine people provided information about where they live now and their preferences for future housing.

Younger people with high support needs and living with family, or living in group homes or aged care, indicated a strong desire to change their living arrangements. They wanted to move to their own place and find greater independence and privacy while maintaining proximity to family, friends and services.

CO-LOCATION CHOICES

More than two thirds of the participants preferred to be living with different people to their current situation. This resonates strongly with those currently living with parents and/or siblings wanting more independence and to live with friends. Those living with other people reported a strong preference to live by themselves with support.

These preferences are important to consider for future investments into SDA dwellings. Accessible houses, units and apartments are more likely to be the preference for most SDA seekers. This is a very different future SDA supply profile to what currently exists – mainly group homes.

" I would live somewhere with younger people, people my own age"

ACCESSIBILITY AND MOBILITY

For most of the survey participants, accessibility and mobility within their dwelling was reported to be satisfactory.

However, suggested improvements included increasing the number of automated doorways.

"It's on a hill so I can't walk anywhere"

"House was not designed to be accessible. Step at the front and rear doors, double storey with all bedrooms upstairs."

HOUSING PREFERENCES

6.2

PRIVACY

For those participants expressing dissatisfaction with the level of privacy in their supported accommodation, the key concerns related to unwanted intrusions from staff and other residents. Many expressed their preference for their own bathroom closer to their room.

“My (accommodation) feels busy and crowded, lack of privacy and space, overwhelming especially when visitors are over.”

“Privacy in both of the nursing homes I’ve lived in has been terrible. Staff would be present during doctor visits and nursing procedures.”

“Not enough privacy. People are always in and out of the house.”

SAFETY

Responses in respect of safety and security were varied. Those reporting satisfaction with their current situation on these matters tended to reside with their families and/or had good accessibility in and around their homes.

Participants expressing dissatisfaction over the safety provided by their current living situation resided in both supported accommodation and private homes.

“I feel 10/10 safe where I am: I live with my family.”

“Do not feel safe due to accessibility issues.”

07 APPENDIX

APPENDIX 1 - NSW

7.1

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
NSW	5,738	9,029	3,291	10,101
Capital Region	153	262	108	283
Goulburn- Yass	88	85	-3	113
Queanbeyan	27	69	42	48
Snowy Mountains	3	23	20	10
South Coast	35	84	49	112
Central Coast	209	391	183	450
Gosford	54	202	148	203
Wyong	154	189	35	247
Central West	254	246	-8	370
Bathurst	57	56	-2	74
Lachlan Valley	31	66	35	89
Lithgow- Mudgee	30	56	25	91
Orange	135	69	-67	115
Coffs Harbour- Grafton	88	162	74	219
Clarence Valley	35	59	24	71
Coffs Harbour	52	103	50	148
Far West and Orana	159	136	-23	187
Bourke- Cobar- Coonamble	10	29	19	27
Broken Hill and Far West	21	24	3	32
Dubbo	128	83	-45	128

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Hunter Valley exc Newcastle	176	315	139	312
Lower Hunter	48	105	56	117
Maitland	58	89	31	80
Port Stephens	62	85	23	85
Upper Hunter	8	36	28	29
Illawarra	256	354	98	355
Dapto- Port Kembla	57	91	34	126
Illawarra Catchment Reserve	0	0	-0	0
Kiama- Shellharbour	116	108	-8	98
Wollongong	83	156	72	132
Mid North Coast	129	252	123	412
Great Lakes	18	37	20	40
Kempsey- Nambucca	32	57	25	115
Port Macquarie	51	93	42	137
Taree- Gloucester	28	64	36	120
Murray	111	137	27	166
Albury	96	73	-23	105
Lower Murray	0	15	15	13
Upper Murray exc. Albury	15	50	35	48
New England and North West	155	217	62	255
Armidale	36	44	8	39
Inverell- Tenterfield	29	45	16	69
Moree- Narrabri	17	31	14	35
Tamworth- Gunnedah	73	96	23	112
Newcastle and Lake Macquarie	674	432	-242	507
Lake Macquarie- East	68	144	76	147
Lake Macquarie- West	108	90	-18	90
Newcastle	499	198	-301	270

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Richmond- Tweed	161	286	126	377
Richmond Valley- Coastal	55	94	38	110
Richmond Valley- Hinterland	59	83	24	136
Tweed Valley	46	109	63	130
Riverina	100	186	86	378
Griffith- Murrumbidgee (West)	22	58	36	128
Tumut- Tumbarumba	15	17	2	20
Wagga Wagga	63	112	49	230
Southern Highlands and Shoalhaven	170	176	6	210
Shoalhaven	117	119	2	139
Southern Highlands	53	57	4	71
Sydney- Baulkham Hills and Hawkesbury	234	274	40	239
Baulkham Hills	149	174	25	160
Dural- Wisemans Ferry	40	32	-8	28
Hawkesbury	16	29	14	24
Rouse Hill- McGraths Hill	30	40	9	25
Sydney- Blacktown	170	409	238	428
Blacktown	67	163	95	187
Blacktown- North	77	112	34	71
Mount Druitt	26	134	109	170
Sydney- City and Inner South	103	393	291	311
Botany	51	57	6	59
Marrickville- Sydenham- Petersham	37	67	30	94
Sydney Inner City	14	269	254	158
Sydney- Eastern Suburbs	71	333	262	167
Eastern Suburbs- North	5	159	154	48
Eastern Suburbs- South	66	174	108	119
Sydney- Inner South West	300	698	398	984
Bankstown	98	208	110	314
Canterbury	95	165	70	221
Hurstville	63	155	92	198
Kogarah- Rockdale	44	170	125	252

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Sydney- Inner West	180	360	180	406
Canada Bay	25	105	80	81
Leichhardt	13	69	56	81
Strathfield- Burwood- Ashfield	142	186	44	244
Sydney- North Sydney and Hornsby	233	496	263	311
Chatswood- Lane Cove	49	137	89	78
Hornsby	115	97	-17	90
Ku-ring-gai	36	144	108	103
North Sydney- Mosman	33	117	83	40
Sydney- Northern Beaches	225	311	86	222
Manly	1	52	52	22
Pittwater	30	74	44	60
Warringah	194	184	-10	141
Sydney- Outer South West	151	314	163	339
Camden	33	75	42	53
Campbelltown (NSW)	101	190	89	236
Wollondilly	16	49	33	51
Sydney- Outer West and Blue Mountains	289	367	78	515
Blue Mountains	119	92	-27	187
Blue Mountains- South	0	0	0	0
Penrith	125	167	42	196
Richmond- Windsor	18	44	26	45
St Marys	27	65	37	87
Sydney- Parramatta	497	545	48	609
Auburn	30	110	80	93
Carlingford	148	80	-68	77
Merrylands- Guildford	151	184	33	229
Parramatta	168	171	3	209
Sydney- Ryde	210	222	12	208
Pennant Hills- Epping	21	58	36	29
Ryde- Hunters Hill	189	164	-25	179

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Sydney- South West	137	492	355	586
Bringelly- Green Valley	30	124	94	128
Fairfield	64	225	162	304
Liverpool	44	143	99	154
Sydney- Sutherland	143	263	120	293
Cronulla- Miranda- Caringbah	71	133	62	135
Sutherland- Menai- Heathcote	72	130	58	158
(blank)	0	0	0	3
No usual address (NSW)	0	0	0	3

APPENDIX 2 - VICTORIA

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
VIC	4,264	7,209	2,945	7,390
Ballarat	144	186	42	225
Ballarat	123	123	0	162
Creswick- Daylesford- Ballan	3	34	30	24
Maryborough- Pyrenees	18	30	12	39
Bendigo	141	181	39	203
Bendigo	114	112	-2	136
Heathcote- Castlemaine- Kyneton	25	56	30	55
Loddon- Elmore	2	13	11	12
Geelong	21	333	312	196
Barwon- West	0	22	22	15
Geelong	20	224	204	155
Surf Coast- Bellarine Peninsula	0	86	86	26
Hume	127	200	73	267
Upper Goulburn Valley	10	63	53	88
Wangaratta- Benalla	53	54	1	82
Wodonga- Alpine	64	83	19	97
Latrobe- Gippsland	195	320	125	381
Baw Baw	43	57	14	60
Gippsland- East	38	53	15	51
Gippsland- South West	24	73	49	57
Latrobe Valley	62	87	25	142
Wellington	28	51	22	72
Melbourne- Inner	237	742	505	541
Brunswick- Coburg	36	107	71	125
Darebin- South	73	64	-8	68
Essendon	22	82	60	54

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Melbourne City	6	173	167	82
Port Phillip	21	127	106	88
Stonnington- West	4	79	75	44
Yarra	76	110	34	80
Melbourne- Inner East	436	444	7	492
Boroondara	137	207	70	241
Manningham- West	56	112	56	112
Whitehorse- West	244	125	-118	139
Melbourne- Inner South	409	497	88	387
Bayside	89	120	31	77
Glen Eira	144	183	39	149
Kingston	160	143	-17	124
Stonnington- East	15	51	36	37
Melbourne- North East	527	607	80	647
Banyule	177	149	-28	178
Darebin- North	179	116	-63	147
Nillumbik- Kinglake	17	80	63	64
Whittlesea- Wallan	154	262	108	259
Melbourne- North West	171	446	275	612
Keilor	35	72	36	98
Macedon Ranges	0	36	35	22
Moreland- North	79	93	14	154
Sunbury	29	48	19	30
Tullamarine- Broadmeadows	28	198	170	309
Melbourne- Outer East	530	608	77	696
Knox	92	187	95	223
Manningham- East	2	32	30	25
Maroondah	169	134	-36	185
Whitehorse- East	111	74	-37	75
Yarra Ranges	155	180	25	188
Melbourne- South East	314	926	612	812
Cardinia	10	114	104	68

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Casey- North	35	160	125	134
Casey- South	33	205	172	110
Dandenong	111	230	120	285
Monash	126	216	90	215
Melbourne- West	348	894	546	870
Brimbank	113	230	116	275
Hobsons Bay	74	103	29	124
Maribyrnong	72	102	30	117
Melton- Bacchus Marsh	63	187	124	181
Wyndham	25	272	247	173
Mornington Peninsula	219	350	131	272
Frankston	83	163	80	136
Mornington Peninsula	137	188	51	136
North West	251	177	-74	276
Grampians	175	69	-106	123
Mildura	49	64	15	120
Murray River- Swan Hill	27	44	17	34
Shepparton	102	154	52	249
Campaspe	45	44	-1	79
Moira	0	34	34	54
Shepparton	57	76	19	116
Warrnambool and South West	90	145	55	231
Glenelg- Southern Grampians	29	42	13	77
Warrnambool- Otway Ranges	61	103	42	154
(blank)	0	0	0	31
No usual address (Vic.)	0	0	0	31

APPENDIX 3 - QUEENSLAND

7.3

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
QLD	3,342	5,657	2,315	7,843
Brisbane- East	152	270	118	346
Capalaba	65	87	21	133
Cleveland- Stradbroke	44	100	56	119
Wynnum- Manly	43	83	40	93
Brisbane- North	211	250	39	393
Bald Hills- Everton Park	19	49	30	69
Chermside	49	84	34	131
Nundah	49	47	-2	68
Sandgate	95	70	-24	125
Brisbane- South	173	416	243	561
Carindale	10	61	51	62
Holland Park- Yeronga	31	87	56	118
Mt Gravatt	25	87	62	127
Nathan	40	47	8	78
Rocklea- Acacia Ridge	17	72	56	88
Sunnybank	49	61	12	87
Brisbane- West	106	218	112	268
Centenary	33	39	7	60
Kenmore- Brookfield- Moggill	18	55	37	70
Sherwood- Indooroopilly	41	63	21	59
The Gap- Enoggera	14	61	46	79
Brisbane Inner City	111	309	198	339
Brisbane Inner	8	84	76	97
Brisbane Inner- East	11	50	39	46
Brisbane Inner- North	65	106	40	119
Brisbane Inner- West	26	69	43	76

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Cairns	172	289	117	458
Cairns- North	21	64	43	72
Cairns- South	117	122	5	182
Innisfail- Cassowary Coast	12	42	29	90
Port Douglas- Daintree	2	14	12	20
Tablelands (East)- Kuranda	20	48	29	94
Darling Downs- Maranoa	44	150	106	230
Darling Downs- East	7	50	43	87
Darling Downs (West)- Maranoa	10	52	42	69
Granite Belt	26	47	21	74
Fitzroy	155	264	109	294
Central Highlands (Qld)	4	35	31	28
Gladstone- Biloela	21	91	70	72
Rockhampton	130	138	8	195
Gold Coast	276	690	414	754
Broadbeach- Burleigh	18	75	57	69
Coolangatta	7	64	57	67
Gold Coast- North	41	80	38	109
Gold Coast Hinterland	4	22	18	23
Mudgeeraba- Tallebudgera	11	40	29	54
Nerang	48	81	33	78
Ormeau- Oxenford	66	146	80	142
Robina	16	60	44	67
Southport	65	71	7	119
Surfers Paradise	0	50	50	26
Ipswich	380	389	10	634
Forest Lake- Oxley	167	88	-80	122
Ipswich Hinterland	4	75	71	118
Ipswich Inner	176	125	-51	291
Springfield- Redbank	32	102	69	102

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Logan- Beaudesert	194	383	188	580
Beaudesert	8	17	9	31
Beenleigh	23	49	26	85
Browns Plains	69	96	27	123
Jimboomba	9	55	45	63
Loganlea- Carbrook	60	72	12	121
Springwood- Kingston	25	93	69	155
Mackay	89	203	114	238
Bowen Basin- North	9	40	31	21
Mackay	77	137	60	196
Whitsunday	3	25	22	20
Moreton Bay- North	243	283	40	467
Bribie- Beachmere	17	39	22	47
Caboolture	63	81	18	142
Caboolture Hinterland	0	16	16	15
Narangba- Burpengary	82	76	-6	112
Redcliffe	81	71	-10	151
Moreton Bay- South	80	235	155	252
Hills District	17	104	87	124
North Lakes	26	86	60	57
Strathpine	37	45	8	72
Queensland- Outback	9	96	88	123
Far North	2	39	38	53
Outback- North	7	36	29	47
Outback- South	0	21	21	23
Sunshine Coast	226	417	191	496
Buderim	26	66	39	63
Caloundra	40	97	57	118
Maroochy	31	68	37	87
Nambour- Pomona	70	77	7	107
Noosa	20	50	29	55
Sunshine Coast Hinterland	38	59	22	67

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Toowoomba	255	179	-77	315
Toowoomba	255	179	-77	315
Townsville	194	274	80	441
Charters Towers- Ayr- Ingham	47	50	3	103
Townsville	147	224	77	339
Wide Bay	270	341	71	655
Bundaberg	94	104	10	182
Burnett	24	58	34	134
Gympie- Cooloola	25	59	34	97
Hervey Bay	54	67	13	122
Maryborough	73	53	-20	121

APPENDIX 4 - WESTERN AUSTRALIA

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
WA	1,591	2,985	1,394	2,686
Bunbury	75	210	135	255
Augusta- Margaret River- Busselton	6	61	55	85
Bunbury	63	122	59	123
Manjimup	6	27	21	47
Mandurah	63	116	53	116
Mandurah	63	116	53	116
Migratory- Offshore- Shipping (WA)	8	0	-8	5
No usual address (WA)	8	0	-8	5
Perth- Inner	69	209	139	244
Cottesloe- Claremont	33	83	50	75
Perth City	36	126	89	169
Perth- North East	316	303	-13	208
Bayswater- Bassendean	161	98	-64	87
Mundaring	49	50	2	42
Swan	106	155	49	79
Perth- North West	348	651	302	524
Joondalup	17	188	171	125
Stirling	228	235	6	218
Wanneroo	103	227	125	181
Perth- South East	447	591	144	497
Armadale	24	96	72	75
Belmont- Victoria Park	93	86	-7	105
Canning	84	113	29	94
Gosnells	144	142	-2	116
Kalamunda	79	69	-10	53
Serpentine- Jarrahdale	2	32	30	18

South Perth	20	52	32	36
Perth- South West	211	490	279	472
Cockburn	71	124	53	137
Fremantle	14	45	31	39
Kwinana	17	47	30	59
Melville	60	123	63	96
Rockingham	49	151	102	141
Western Australia- Outback	33	256	223	178
Esperance	4	19	15	19
Gascoyne	0	11	11	6
Goldfields	9	47	38	31
Kimberley	0	42	42	49
Mid West	18	64	46	38
Pilbara	2	72	70	35
Western Australia- Wheat Belt	20	160	140	187
Albany	14	70	56	108
Wheat Belt- North	6	66	60	55
Wheat Belt- South	0	24	24	24
(blank)	0	0	0	29

APPENDIX 5 - SOUTH AUSTRALIA

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
SA	1,721	1,999	278	3,470
Adelaide- Central and Hills	254	347	93	458
Adelaide City	1	27	26	49
Adelaide Hills	34	85	51	96
Burnside	27	53	26	63
Campbelltown (SA)	75	60	-15	79
Norwood- Payneham- St Peters	26	43	16	60
Prospect- Walkerville	14	34	19	45
Unley	77	45	-31	65
Adelaide- North	457	503	45	1,015
Gawler- Two Wells	14	41	26	68
Playford	86	107	20	242
Port Adelaide- East	192	81	-111	186
Salisbury	129	163	33	373
Tea Tree Gully	35	111	76	146
Adelaide- South	540	423	-117	689
Holdfast Bay	167	40	-126	75
Marion	208	107	-101	213
Mitcham	79	76	-3	114
Onkaparinga	86	199	113	287
Adelaide- West	220	272	52	573
Charles Sturt	118	130	12	275
Port Adelaide- West	58	69	11	183
West Torrens	44	73	29	116

Barossa- Yorke- Mid North	53	132	79	183
Barossa	6	43	37	50
Lower North	1	27	26	26
Mid North	20	33	13	63
Yorke Peninsula	26	30	4	44
South Australia- Outback	38	100	62	193
Eyre Peninsula and South West	23	68	45	161
Outback- North and East	15	32	17	32
South Australia- South East	158	221	63	359
Fleurieu- Kangaroo Island	34	60	26	91
Limestone Coast	46	78	32	150
Murray and Mallee	78	83	5	118

APPENDIX 6 - TASMANIA

7.6

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
TAS	510	604	94	646
Hobart	233	262	29	268
Brighton	13	20	7	18
Hobart- North East	56	62	6	65
Hobart- North West	99	62	-37	89
Hobart- South and West	21	39	18	31
Hobart Inner	44	61	17	53
Sorell- Dodges Ferry	0	19	19	11
Launceston and North East	133	167	35	192
Launceston	92	97	5	136
Meander Valley- West Tamar	4	27	22	26
North East	37	44	7	30
South East	24	44	21	30
Central Highlands (Tas.)	13	13	0	12
Huon- Bruny Island	10	23	13	13
South East Coast	0	8	8	6
West and North West	121	130	9	156
Burnie- Ulverstone	57	57	0	75
Devonport	59	53	-6	61
West Coast	5	21	16	20

APPENDIX 7 - NORTHERN TERRITORY AND ACT

7.7

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
NT	165	287	122	293
Darwin	91	170	79	128
Darwin City	0	33	33	9
Darwin Suburbs	71	67	-4	83
Litchfield	5	29	24	8
Palmerston	15	42	27	28
Migratory- Offshore- Shipping (NT)	0	0	0	4
No usual address (NT)	0	0	0	4
Northern Territory- Outback	74	116	42	161
Alice Springs	61	46	-15	77
Barkly	0	7	7	10
Daly- Tiwi- West Arnhem	0	21	21	21
East Arnhem	0	17	17	18
Katherine	13	24	11	35

	Existing SDA residents	Per capita distribution	Difference/shortfall between existing and per capita distribution	Potential demand
Australian Capital Territory	212	471	259	761
Belconnen	37	114	77	218
Canberra East	0	2	2	4
Cotter- Namadgi	0	6	6	1
Gungahlin	22	84	62	59
North Canberra	33	63	30	107
South Canberra	10	32	22	75
Tuggeranong	57	100	43	154
Weston Creek	24	27	3	65
Woden	28	41	13	77
(blank)	0	0	0	0
Jervis Bay	0	0	0	0

APPENDIX 8 - TECHNICAL NOTES

7.8

DATA AND THE APPROACH

- Administrative data is sourced from the annual Disability Services National Minimum Data Set compiled by AIHW and is for the period 2013-14 for NSW and ACT and for the period 2015-16 for all other jurisdictions.
- This dataset provide the most comprehensive picture of disability service users in state disability systems prior to transition to the NDIS.
- Administrative data on people under 65 years living in residential aged care is from the AIHW National Aged Care Data Clearinghouse, as at 30 June 2016.
- The analysis of the AIHW datat has been undertaken on the basis of statistical areas (SAs) used by the Australian Bureau of Statistics – data analysed at the SA4 and SA3 level. For maps of these statistical areas visit: http://stat.abs.gov.au/itt/r.jsp?ABSMaps
- Three data sets were analysed for this report: (1) disability service users living in existing supported accommodation (SDA) (2) disability service users with very high support needs living in settings other than an "accommodation service" (3) residential aged care users who are aged under 65 years
- For disability service users living in settings other than an "accommodation service", "very high support needs" were defined as those service users requiring support all the time in two or more of five core life areas:-
    - Self-care
    - Mobility
    - Communication
    - Interpersonal interactions and relationships
    - Domestic life
- This definition aimed to identify people with a very high level of in-home support required and a likely need for highly accessible housing. This was considered a reasonable proxy for identifying people who may be eligible for SDA payments under the NDIS.
- All data is based on adults aged 18-64 years.

APPENDIX 9 - TECHNICAL NOTES

SOURCES AND ASSUMPTIONS

- The disability service data is a snapshot in time of service users in the state-based disability systems prior to commencement of NDIS transition (2013-14 for NSW and ACT; 2015-16 for other jurisdictions)
- This data does not capture people in need of disability support services but who were not either using disability services or permanently residing in aged care for the relevant year. Missing cohorts could include those residing in hospital settings, justice settings, homeless or entirely supported by family and not accessing disability support.
- The analysis identifies existing supply of SDA (supported accommodation).
- 13% (2,341 places) are in settings with more than 7 residents and will require replacement. The remaining SDA stock comprises group homes; not all existing supply is expected to remain in the future SDA profile due to increasing user choice and alternatives developed in the SDA supply market more aligned with user preferences.
- A proportion of existing SDA supply will also require replacement due to age and condition.
- Existing SDA supply has been funded under state disability programs and the location and type of supply reflects historic funding and administrative decisions.
- Analysis of SDA demand in this report is based on current location of people with very high support needs and does not necessarily reflect preferred locations. This is particularly relevant for areas lacking SDA supply or with undersupply of other disability services, for example remote and very regional locations. People with disability from these locations may be residing in larger urban centres but wish to return to their communities when provided with this option.

APPENDIX 10 - TECHNICAL NOTES

EFFECTIVE JOB DENSITY

SGS has developed a spatial index measuring the relative access to jobs referred to as Effective Job Density or EJD. EJD is a measure of the relative concentration of employment, derived from the density and accessibility of all jobs across a region. This, in turn, reflects relative access to retail, health, education, recreational and other opportunities, which is a driver of property values.

The region might be a city or, in this report, the entire Australian continent. The 'National EJD' of a specific area provides a relative rank of how "agglomerated" or connected to opportunity one location is, compared to any other location in the country.

It is calculated using two variables:

- Car travel time from location a to location b- calculated using actual road networks
- Number of jobs at location b

The figure below shows the formula used to derive the index.

$$\mathrm{EJD}_{at_a} = \sum_{b=a}^{n} \frac{\mathrm{Jobs}_{at\ b}}{\mathrm{Travel\ time}_{a\ to\ b}}$$

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