Specialist Disability Accommodation (SDA) Report: 2026

Acknowledgement of Country

The NDIA acknowledges the Traditional Custodians of Country throughout Australia and their continuing connection to land, sea and community. We pay our respects to them and their cultures, and to Elders past, present and emerging.

Artwork: ‘Belonging’ by Charmaine Mumbulla.

Contents

1. Summary

1.1 Purpose

Specialist Disability Accommodation (SDA) is a range of housing designed for people with extreme functional impairment or very high support needs. The National Disability Insurance Scheme (NDIS) funds this support as needed.

This SDA Report provides extra context to the SDA data published each quarter in the NDIA's Quarterly Reports.

This report includes some new data that hasn't yet been published in Supplement P. This includes:

- Participants with an SDA need and utilisation by build type recorded in their plan.
- Participants with an SDA need by utilisation and primary disability group.
- Participants with an SDA need by utilisation and age group

This report is intended for people interested in learning more about SDA activity recorded through current Agency systems and processes. It gives a general overview of SDA data between 31 December 2024 and 31 December 2025, including key trends over time.

The report is not intended to cover everything. Instead, it aims to support understanding of the published data and encourage informed discussion about the SDA market. It does not provide investment advice or predict future market performance.

SDA market conditions vary across locations, dwelling types and participant cohorts. Readers should consider local conditions and participant preferences when interpreting the information in this report.

You can find a glossary of key terms used in this report from page 55.

We welcome feedback on this report and will consider it when improving future versions.

1.2 SDA market snapshot

In 2025 the SDA market saw a 4% increase in the number of participants with an SDA need (24,522 at 31 December 2024 to 25,502 at 31 December 2025). In the same period, overall Scheme participant growth was 10%, however Scheme growth in those primary disability types most associated with SDA was 4–6%, broadly aligning with the increase in participants with an SDA need.

Funding use and the number of enrolled dwellings increased.

- 8.4% increase in the number of participants utilising their SDA funding. (14,688 to 15,925 within the same period)
- 23.7% increase in the number of enrolled dwellings. (10,749 to 13,297 within the same period)

Areas in Perth, Melbourne and Adelaide drove the growth of enrolled SDA dwellings.

- 75% of new enrolled dwellings nationwide were High Physical Support.
- Within the last 12 months, Victoria overtook New South Wales in total SDA commitment by $ value.

SDA supports and payments continue to grow. Over the past 2 years, the NDIA saw a:

- 19% per annum increase in total SDA supports committed, from $440m to $626m.
- 38% per annum increase in total SDA payments, from $267m to $507m.

2025 observations

New Build SDA supply continues to grow across Australia

Nationally, growth in enrolled SDA dwellings remained strong in 2025 and the pipeline of SDA supply remained active. Participant demand for SDA continued to increase and remained broadly aligned with long term projections. More participants used their SDA funding in 2025.

Growth in New Build SDA, alongside the gradual decline in Existing Stock, is consistent with current SDA pricing settings. Current pricing settings support the delivery of new contemporary dwellings, while lower pricing for Existing Stock supports continuity for participants who choose to remain in these homes.

However, signs of oversupply and misalignment with demand are emerging in some areas

In some locations, the number of available SDA places exceeds the number of participants with an SDA need. We continue to observe higher levels of supply relative to identified participant need in areas including Melbourne West, Adelaide North, Ipswich, Adelaide South and Logan – Beaudesert. These areas are generally associated with lower land costs.

Local market conditions matter. Investors and providers should consider local demand and market conditions, alongside state, territory and national data when making investment decisions.

As SDA supply and participant choice increase, location continues to be important. Access to community, transport, health services and support networks can all influence participant demand and dwelling occupancy.

This report includes data on the build type recorded in participants' Home and Living decisions which has not yet been published in Supplement P. This doesn't indicate where a participant is currently living. Participants can choose an SDA dwelling with a different build type or design category than their decision, provided they spend within their plan. As the recorded build type is linked to the SDA budget available for a participant, it will influence demand.

This data shows that 3 resident houses are the most common build type in Home and Living decisions for participants with an SDA need. However, recent SDA supply growth – both in enrolments and planned dwellings – has been concentrated in smaller dwelling types, including 2 resident houses.

This creates a risk that participant demand and available SDA supply are not aligned in relation to build type. Investors should consider this data alongside local demand when making decisions.

Responding to participant need is important for long-term sustainability

As the SDA market grows, participants have more opportunity to choose housing that suits their needs and preferences, within their approved NDIS funding. This increases the importance of matching SDA design, location and dwelling configuration to participant need.

Participants use a range of in-home support arrangements, including supported independent living (SIL), onsite shared supports and individualised living options. The way supports are delivered can also influence the type of SDA participants need.

Understanding participant support needs and local demand is important to support occupancy and participant choice. For example, participants who share SIL supports with two other people may have fewer suitable options if only 2 bedroom dwellings are available in their local area.

As in-home support models continue to evolve, understanding what this means for participant needs will remain important for the SDA market.

1.3 SDA data improvements

From September 2024 to August 2025, the NDIA completed the SDA Data Project. This project worked towards improving the public data shared for SDA.

The NDIA partnered with Finity Consulting to conduct stakeholder consultation, review current SDA data and deliver options for improvement based on the consultation.

The recommendations focus on improving data collection, strengthening data quality through system updates, and sharing data in more user-friendly formats.

During 2025, we delivered several initiatives to strengthen SDA data and improve access to information, including:

Improving data collection

- Reviewing and improving the data captured for dwellings registered at the Design Stage. This includes:
  - improving the accuracy of the data we collect at design stage.
  - uplifting data quality to better match unfinished dwellings to enrolled dwellings.
  - exclusion of unfinished dwellings from potential future supply. These are dwellings that were submitted at the design stage but have not progressed to enrolment within a specified timeframe.

These updates came into effect in our 31 March 2026 quarterly reporting and provide a more reliable view of the potential future supply of SDA. They aim to provide SDA stakeholders with more accurate information to support planning and decision making for future SDA.

Strengthening data quality through system updates

- Design of a series of system improvements to strengthen data quality and enable more detailed insights into the SDA market.

Sharing data in more user-friendly formats

- Publishing insights from stakeholder consultation with SDA providers, investors, participants, families, and carers.
- Establishing a central SDA data webpage to bring together all SDA data releases, reports, and tools in one accessible location.
- Expanding the data included in Supplement P, with new tables that provide more granular information on SDA locations and SDA decision data.

- Releasing the SDA Report (May 2025), offering a high-level overview of SDA activity up to 31 December 2024.

Work to improve SDA data is ongoing, with system improvements a longer-term initiative to improve data quality and provide more reliable SDA data in future.

In the short to medium term, we will continue to look at ways to share more meaningful insights and data with the SDA market.

This report draws on feedback and findings from the SDA Data Project. It includes information based on current Agency system capability and some data that has not yet been publicly released. We are investigating ways to share this data in the future and are open to feedback about whether the information is useful to the market.

1.4 SDA policy and regulatory updates

Scheme sustainability

The NDIS plays a critical role in supporting people with permanent and significant disability. However, it continues to grow at a far higher rate than any other comparable program, placing long-term Scheme sustainability at risk.

On 22 April 2026, the Minister for Disability and the NDIS the Hon Mark Butler MP gave a speech at the National Press Club. This speech detailed planned reforms to secure the NDIS for Australians with permanent and significant disability and to ensure it can serve future generations.

The 2026–27 Budget reinforced these reforms by providing additional detail and targeted investment to support implementation.

Due to this, the participant landscape will likely evolve.

Of note:

- Changes are occurring to the participant planning process which will deliver more consistent participant budgets through a new support needs assessment process and budget method. This new planning process is called new framework planning (NFP).

- The Government is moving to a new supports model for plan management, support coordination and supported independent living (SIL). Design and consultation on SIL commissioning will commence from July 2026.
- The Agency has developed a 3-year Pricing workplan which will set out a staged program of pricing improvements designed to ensure NDIS markets are able to deliver high-quality, sustainable supports for participants.
- Both SDA and SIL pricing will be reviewed as part of this workplan.

Information to support SDA Investors

To strengthen support for prospective SDA investors the Agency released an updated detailed investor webpage in July 2025.

The Agency also delivered public webinars focused on integrity and SDA investment in September 2025. These involved the Australian Competition & Consumer Commission (ACCC), NDIS Quality and Safeguards Commission (NQSC) and the Australian Securities and Investments Commission (ASIC).

Review of the SDA Design Standard

A review of the SDA Design Standard was announced in September 2025. The Agency has engaged KPMG to undertake the review.

The consultation phase for the review of the SDA Design Standard ran from October to December 2025. We heard from more than 350 stakeholders about their experiences using the current Standard, including:

- participants
- families and carers
- the disability sector
- community organisations
- people who design, build and invest in SDA.

The feedback highlighted areas of the SDA Design Standard which could be changed to support ongoing delivery of safe, high-quality and contemporary dwellings for NDIS participants with an SDA need. Further information is available on the NDIS Engage page Specialist Disability Accommodation Design Standard Review.

Deceptive and misleading advertising

The NDIA is aware of misleading and deceptive advertising in the SDA market.

Some examples of problematic advertising include the following claims:

- Guaranteed return on investment or profitability
- Guaranteed occupancy
- SDA properties are more secure investments than other types of investments (i.e. recession proof investment, guaranteed income, etc.)
- SDA properties having secure government funding or are 'government-backed'.

The NDIA works collaboratively with the ACCC, ASIC and the NQSC as required to address any concerning SDA market behaviours.

ASIC is Australia's integrated corporate, markets, financial services, and consumer credit regulator. ASIC has taken and will continue to take action where appropriate against unscrupulous SDA property investment schemes. Investors are encouraged to contact ASIC if they are concerned that an SDA investment scheme has engaged in misleading behaviour or misappropriated investor funds.

2. Participant SDA data

Table 1: SDA participant snapshot as at 31 December 2025.

Participants with an identified SDA need	Percentage of participants with an identified SDA need	Participants with SDA in use	Participants not yet using SDA
25,502 as at 31 December 2025	**3%** of all participants with NDIS plans	**+8.4%** from 14,688 to 15,925 since 31 December 2024	**-4%** from 9,961 to 9,577 since 31 December 2024

This section provides insights into the current participant demand for SDA. These insights are based on an identified SDA need among NDIS participants and any trends observed over time.

2.1 Data clarifications

We estimate SDA need by analysing two participant cohorts:

Participants with SDA in use

This refers to participants with SDA funding who are living in an SDA dwelling. They must have SDA funding in their current NDIS plan and confirmed evidence of residing in an enrolled SDA dwelling. We use SDA payment records, active SDA service bookings, and address-matching against enrolled SDA dwelling enrolment data to gather this evidence.

Participants SDA eligible, not yet using SDA

This refers to participants with SDA funding who are not living in an SDA dwelling. They must have SDA funding in their current NDIS plan and no confirmed evidence of SDA use. This also includes participants who are eligible for SDA through the Home and Living application process but haven't had SDA funding added to their NDIS plan yet.

Participants may not yet have SDA funding in use for a range of reasons, including where:

- SDA has only recently been included in their plan
- they are not yet ready to leave their current accommodation
- they are still considering options or waiting for a suitable vacancy
- they are awaiting the completion of a new-build SDA dwelling identified for their needs
- they have not yet located a suitable SDA dwelling, either by location or SDA type/design category.

Missing design category data

Participants with an SDA need, but without a design category decision, are referred to as having a "Missing" design category in the data. This is largely due to participants transitioning to the NDIS from a Defined Program and remaining in the same enrolled SDA dwelling. As they haven't moved to a different dwelling, they haven't needed a design category decision.

Between December 2024 and December 2025, the number of these participants fell by 14%.

As of December 2025, 5,381 participants with an SDA need (21%) have a missing design category.

We expect this downwards trend to continue as more participants undertake Home and Living assessments and data quality improvements take effect.

Missing design category information for eligible SDA decisions is the result of legacy information capture. For these cases, design category information is not readily available in a structured format that can be systematically extracted and analysed.

Note:

As the Agency continues transition to a new CRM system (PACE), changes in how eligibility and funding are recorded have limited our ability to analyse historical data.

All figures in this report are point-in-time snapshots drawn from Supplement P to the Quarterly Report to Disability Ministers and reflect the position as of 31 December 2025 unless otherwise noted.

The data presented in this report reflects information recorded in current Agency systems and may not fully capture all aspects of participant need, preferences or actual use of supports.

Some measures, such as enrolled dwellings or funding in plans, may not directly represent market demand or utilisation in practice.

2.2 Distribution of participants with an SDA need

Note:

The figures in this section reflect the design category and build type recorded in the participant's Home and Living recommendation. This may not reflect the design category or build type the participant is actually living in.

The number of participants eligible for SDA has trended upward from 2022 to 2025. Currently, 25,502 participants have an SDA need.

The following sections explore this cohort by design category, build type, disability type, age group and state and territory.

Figure 1: Number of participants out of 25,502 using SDA or who are eligible, but not yet using SDA as at 31 December 2025.

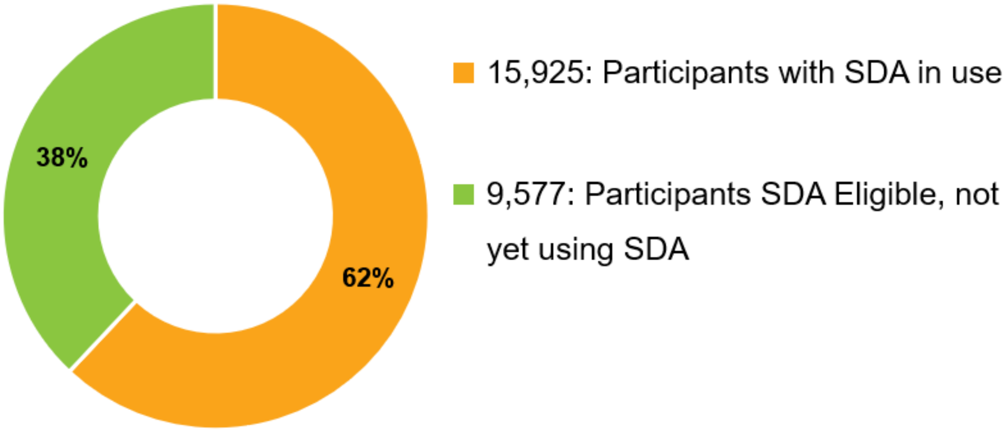


Table 2: Participants with an SDA need by status.

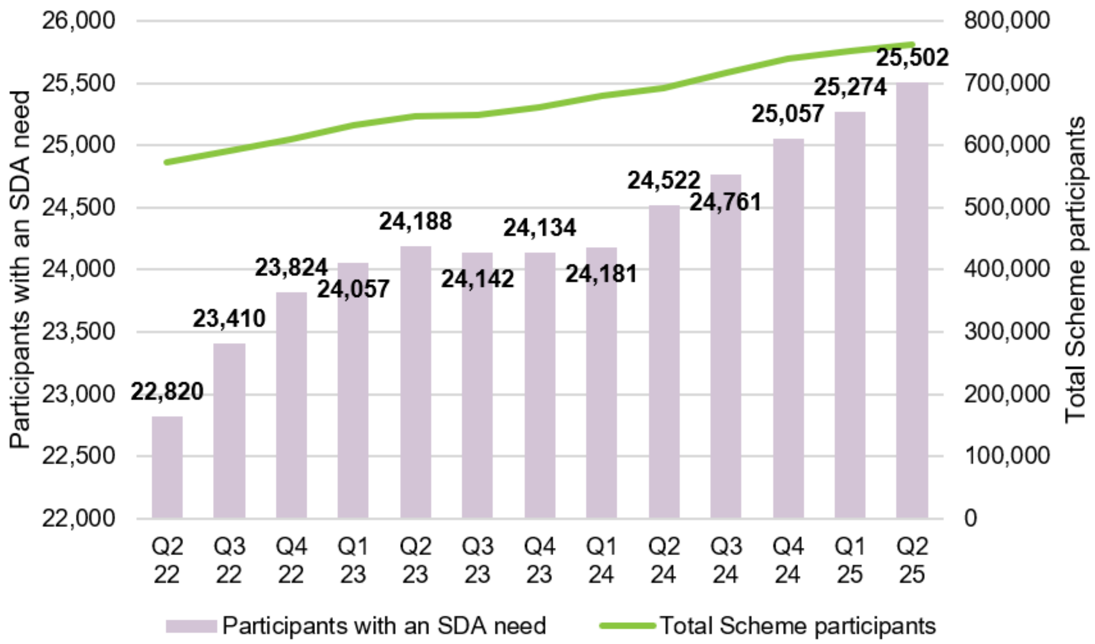
Quarter	SDA in use	SDA eligible, not in use	Total participants with an SDA need
Sep 2023	13,906	10,151	24,057
Dec 2023	14,097	10,091	24,188
Mar 2024	14,088	10,054	24,142
Jun 2024	14,179	9,955	24,134
Sep 2024	14,290	9,891	24,181
Dec 2024	14,688	9,834	24,522
Mar 2025	15,099	9,662	24,761
Jun 2025	15,177	9,880	25,057
Sep 2025	15,518	9,756	25,274
Dec 2025	15,925	9,577	25,502

Note:

Agency systems began transition during this period, impacting the data. Moving from legacy CRM to PACE changed how we record SDA. This primarily effects the figures from June to December 2023.

Figures from September 2024 onward reflect the PACE method of recording SDA. These figures can be directly compared. Figures prior to September 2024 should be interpreted with caution.

Figure 2: Participants with an SDA need.



This chart shows the number of participants with an SDA need increased from 22,820 in Q2 2022 to 25,502 in Q2 2025. An overall rise of 2,682 participants and growth of 12%.

Over the same period total Scheme participants grew from 573,342 to 761,442. An overall rise of 188,100 participants and growth of 33%.

SDA need has limited impact on total Scheme growth. Each year, growth of total Scheme participants is greater than growth of participants with an SDA need. For example, in 2025, the number of participants in the Scheme increased by 10% while the number of participants with an SDA need only increased by 4%. This reflects the fact that cohorts other than SDA primarily drive Scheme growth.

Design category

Under the SDA Operational Guideline, participants can choose where they live, provided costs remain within their approved SDA funding. As a result, a participant's recorded design category may not always match the type of dwelling they are living in.

The three most common design categories recorded for participants with an SDA need are:

- 28% Improved Liveability
- 24% Fully Accessible
- 20% High Physical Support.

Together, these three categories make up nearly three-quarters of participants with an SDA need.

Table 3: Participants with an SDA need and utilisation by design category.

Design category	SDA in use	SDA Eligible, not in use	Participants with an SDA need
Improved liveability	3,991	3,190	7,181
Fully accessible	3,253	2,962	6,215
High Physical Support	3,273	1,763	5,036
Missing / Basic	4,529	852	5,381
Robust	879	810	1,689

This table shows overall SDA need and utilisation of SDA across the design categories.

Build type

A participant’s recorded build type may not always match the type of dwelling they are living in.

House (3 resident) is the most common dwelling type among participants with an SDA need who have received a Home and Living recommendation, accounting for 45% (11,612 participants).

House (2 resident) represents the next most common dwelling type among participants with an SDA need with 12% of participants (2,991 participants).

Table 4: Participants with an SDA need and utilisation by build type.

Build type	SDA in use	SDA Eligible, not in use	Participants with an SDA need
Apartment, 1 bedroom, 1 resident	1,315	481	1,796
Apartment, 2 bedroom, 1 resident	120	28	148
Apartment, 2 bedroom, 2 resident	490	361	851
Apartment, 3 bedroom, 2 resident	<11	<11	<11
Villa / Duplex / Townhouse, 1 residents	785	657	1,442

Build type	SDA in use	SDA Eligible, not in use	Participants with an SDA need
Villa / Duplex / Townhouse, 2 residents	279	310	589
Villa / Duplex / Townhouse, 3 residents	240	245	485
House (2 resident)	1,458	1,533	2,991
House (3 resident)	6,520	5,092	11,612
House (4-5 resident)	262	41	303
Legacy (6+ resident)	<40	<11	<40
Missing	4,421	823	5,244

This table shows SDA need and utilisation of SDA across the build types.

Utilisation rates vary across the build types ranging from:

- Apartment, 2 bedroom, 1 resident (81%)
- Apartment, 2 bedroom, 2 resident (58%).

Disability type

73% of participants with an SDA need fall within the following five disability groups:

- Intellectual disability: 8,368 (33%)
- Cerebral palsy: 2,715 (11%)
- Autism: 2,554 (10%)
- Other neurological: 2,503 (10%)
- Acquired brain injury: 2,446 (10%)

Table 5: Participants with an identified SDA need by utilisation and primary disability group.

Primary disability group	SDA in use	SDA Eligible, not in use	Participants with an SDA need
Intellectual disability	5,978	2,390	8,368
Cerebral palsy	1,872	843	2,715
Autism	1,508	1,046	2,554
Other neurological	1,275	1,228	2,503
Acquired brain injury	1,403	1,043	2,446
Stroke	701	642	1,343
Down syndrome	875	361	1,236
Psychosocial disability	569	492	1,061
Spinal cord injury	493	397	890
Other	365	420	785
Multiple sclerosis	445	338	783
Other physical	376	321	697
Visual impairment	59	48	107
Hearing impairment	<11	<11	<11
Other sensory / speech	<11	<11	<11
Missing	<11	<11	<11

Primary disability group	SDA in use	SDA Eligible, not in use	Participants with an SDA need
Total	**15,925**	**9,577**	**25,502**

Age group

Participants in age groups **35 to 65+** account for approximately **81% of total SDA demand**.

Demand for SDA increases from age 25 onwards with demand peaking in the 55 - 64 age group. Only half of those aged 25 - 34 are using SDA.

Table 6: Participants with an SDA need by utilisation and age group.

Age group	SDA in use	SDA Eligible, not in use	Participants with an SDA need
Under 18	25	107	132
19 to 24	589	838	1,427
25 to 34	1,878	1,499	3,377
35 to 44	2,478	1,392	3,870
45 to 54	3,391	1,631	5,022
55 to 64	4,798	2,607	7,405
65+	2,766	1,503	4,269
Total	**15,925**	**9,577**	**25,502**

State and territory

New South Wales, Victoria and Queensland account for 78% of all participants with an SDA need nationally. This reflects both population size and the concentration of SDA supply in the eastern states.

The remaining 22% of participants with an SDA need are spread across South Australia, Western Australia, Tasmania, Australian Capital Territory and Northern Territory.

Table 7: Participants with an SDA need and utilisation by state / territory.

State / territory	SDA in use	SDA Eligible, not in use	Participants with an SDA need
VIC	5,393	1,947	7,340
NSW	5,112	3,012	8,124
QLD	2,678	1,812	4,490
SA	1,566	950	2,516
ACT	210	139	349
WA	750	1,119	1,869
NT	103	210	313
TAS	113	388	501

2.3 SDA utilisation

Nationally:

- 62% of participants with an SDA need are actively using their SDA funding (increasing from 59% in December 2023).

- 38% are eligible but not yet using SDA.

There are a range of reasons why participants may not yet be using their SDA funding. To learn more, see section 2.1 Data clarifications.

SDA utilisation by state and territory

Victoria (73%) has the **highest** rate of SDA utilisation by state / territory.

Tasmania (23%) and the Northern Territory (33%) currently have the **lowest** rate of SDA utilisation by state / territory.

Utilisation is also influenced by historical enrolment arrangements. This means that some participants may be living in dwellings that are no longer enrolled or have never been enrolled for SDA and are therefore not claiming SDA payments.

These participants appear in the data as SDA-eligible but not utilising SDA funding, lowering the observed utilisation rate.

Western Australia has recorded a **notable improvement** in SDA utilisation over the 12-month period to 30 December 2025, increasing from 23% to 40%.

2.4 Average SDA funding

SDA payments represent approximately 1% of all payments made through the NDIS.

From 2023 to 2025:

- Total SDA supports committed by the NDIA increased by 19% per annum ($440 million to $626 million).
- Total SDA payments grew by 38% per annum ($267 million to $507 million).
- The average SDA payment per participant rose by 31% per annum.

Two key factors have driven this increase:

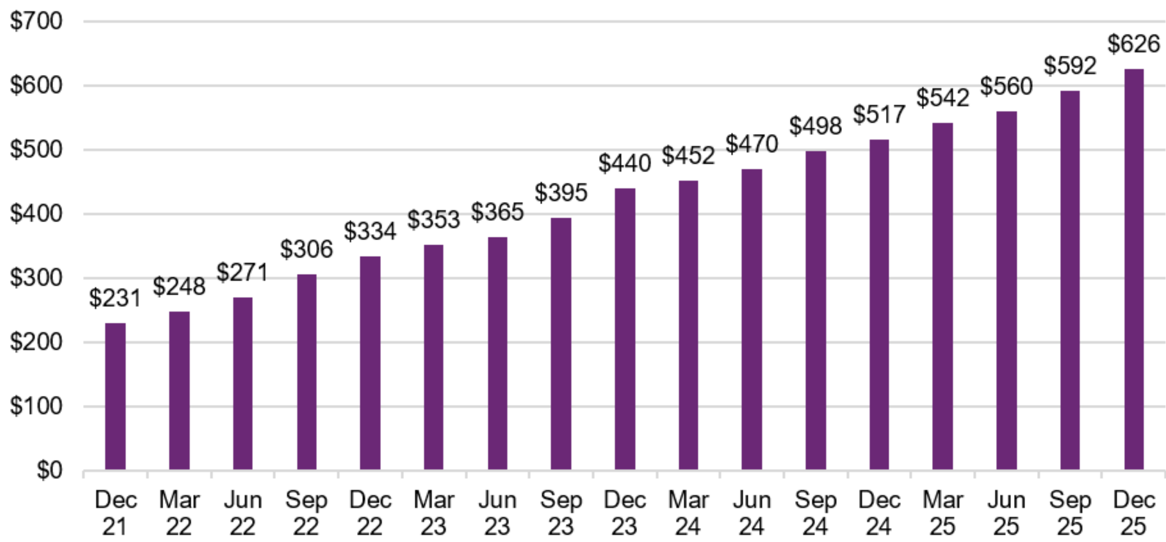
- New SDA benchmark prices. These prices came into effect from 1 July 2023 following the SDA Price Review. They include automatic annual indexation of SDA funding amounts in plans from 1 July 2024 and 1 July 2025.

- More participants moving into new-build SDA dwellings. These dwellings generally attract higher prices than older existing and legacy stock SDA dwellings. As use of lower priced existing and legacy stock dwellings declines over time, the overall average SDA payment increases.

Table 8: Change in annualised SDA supports in active plans.

Dimension	2023	2024	2025	% increase (per annum)
Participants using SDA	14,097	14,688	15,925	6%
Participants eligible for SDA, not yet using SDA	10,091	9,834	9,577	-3%
Total SDA supports ($m)	440	517	626	19%
Average SDA supports ($)	19,100	27,500	34,200	34%
Total SDA payments ($m)	267	382	507	38%
Average SDA payments ($)	19,300	26,500	33,100	31%

Figure 3: Quarterly change in annualised SDA supports in active plans ($m).



State and Territory SDA payment breakdown

From December 2024 to December 2025, Victoria's annualised SDA funding increased by 24%. This caused Victoria to overtake New South Wales as the state with the largest SDA commitment by dollar value.

As of December 2025, Victoria and New South Wales represented 56% of total committed SDA supports nationally.

Table 9: Change in SDA annualised funding by state / territory, December 2024 to December 2025.

State / Territory	Q2 2024-25	Q2 2025-26	% increase
NSW	$153,517,299	$173,022,955	13%
VIC	$141,264,274	$175,778,979	24%
QLD	$121,885,371	$146,789,003	20%
WA	$43,258,229	$55,839,968	29%
SA	$38,407,870	$53,527,738	39%
ACT	$6,509,079	$7,535,308	16%
TAS	$6,214,145	$7,223,051	16%
NT	$5,565,864	$6,750,202	21%
Total	**$516,622,130**	**$626,467,204**	**21%**

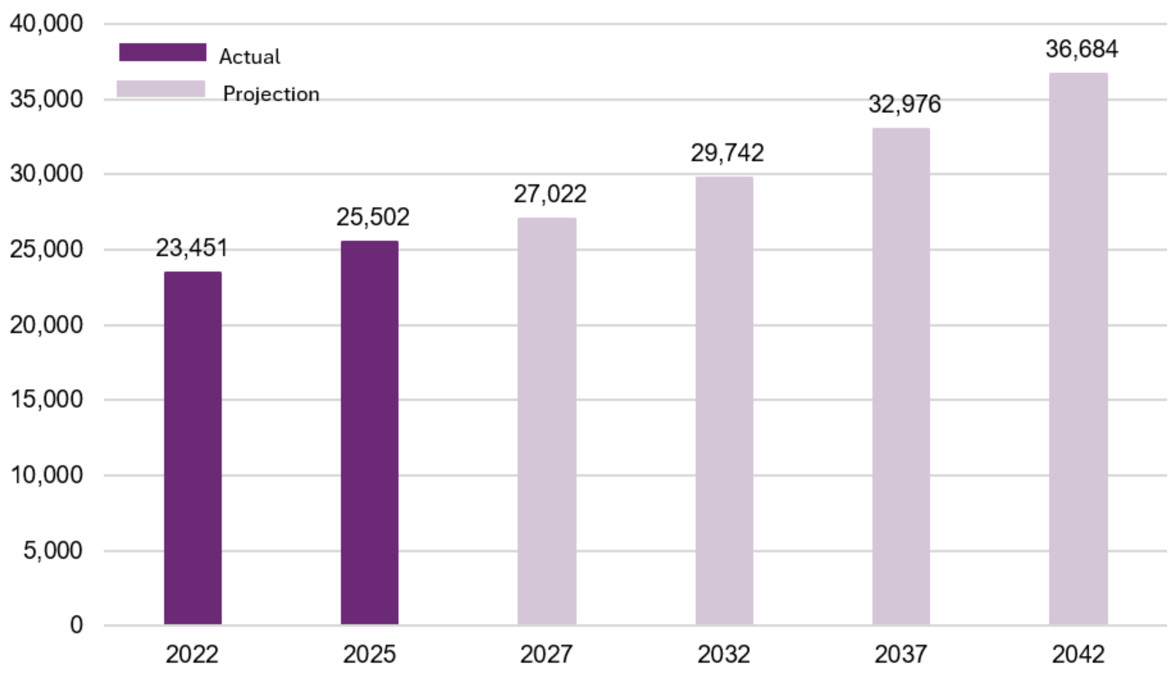
2.5 Projections of participants with an SDA need

In June 2023, as part of the SDA Pricing Review, the NDIA released the Specialist Disability Accommodation Pricing Review 2022–23 Demand Projections Report.

This report presents long-term (2022-42) estimates of future SDA demand, informed by the Scheme Actuary's participant projections used for the 2023–24 Budget. It is intended to help providers and stakeholders understand emerging market trends and support informed decision-making.

We have included the current participant numbers to demonstrate how these projections are trending.

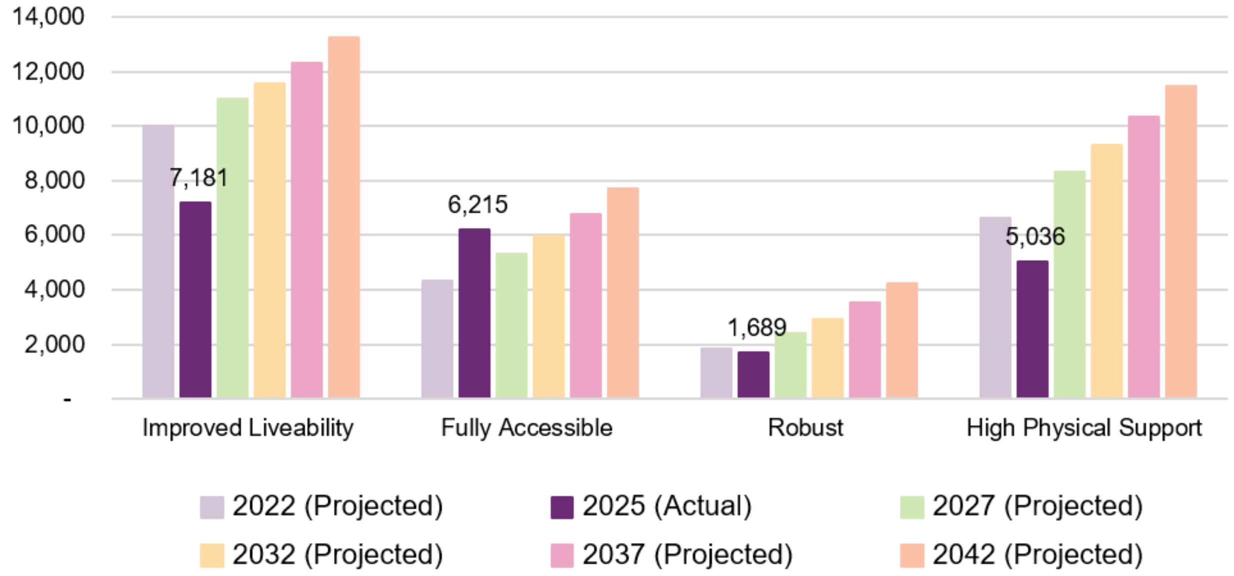
Figure 4: Projected SDA demand, actual figures used for 2022 and 2025.



Projected demand for SDA by Design Category

Total SDA demand is projected to grow across all design categories over the projection period.

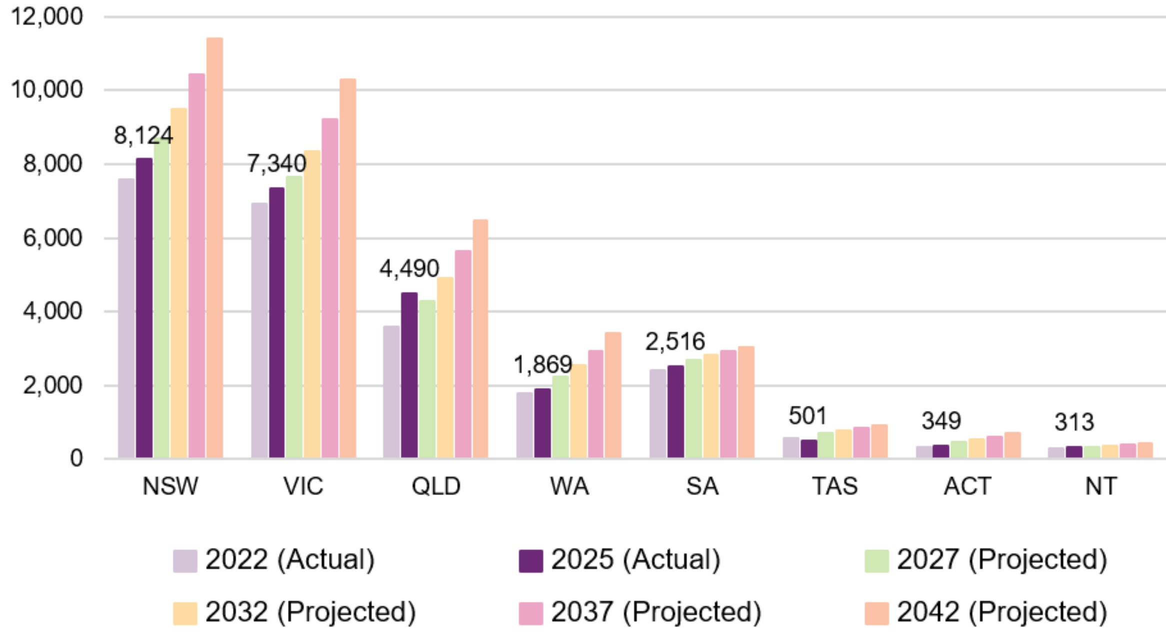
Figure 5: Projected SDA demand by design category, actual figures used for 2025.



Projected demand for SDA by state and territory

SDA demand is projected to increase across all Australian states and territories over the next 20 years.

Figure 6: Projected SDA demand by design category by state / territory, actual figures used for 2022 and 2025.



These projections reflect the phased rollout of the NDIS and location specific legacy arrangements of participants entering the Scheme. For example, Western Australia initially had lower levels of identified SDA need due to the phased rollouts and their decision not to enrol some of their existing SDA stock. These initial levels are gradually moving closer to the national average.

With the Scheme roll out now complete and SDA eligibility assessments standardised, projected demand increasingly reflects underlying need. The effect of the phased rollout is assumed to reduce over the projection period.

3. Supply of SDA enrolled dwellings

Table 10: SDA enrolment snapshot as at 31 December 2025.

Enrolled SDA dwellings	Single resident dwellings	Dominant design category	Highest state or territory growth
13,297 at 31 December 2025	**41%** of all enrolled SDA stock	**75%** of new enrolments are High Physical Support	**105%** Western Australia

This section provides insights on the current supply of enrolled SDA dwellings and trends over time.

3.1 Data clarifications

We capture enrolled SDA dwelling information after we have approved an enrolment application. Dwellings that are still being designed or built are not included in this section.

Supply of SDA data focuses on the number of enrolled dwellings rather than the total number of individual rooms or beds in a dwelling.

Maximum capacity estimates are based on the maximum number of residents recorded for the dwelling at the time of enrolment. This means they may not accurately reflect current SDA participant occupancy, particularly where someone not eligible for SDA occupies a room.

Legacy properties housing 6+ residents are excluded from maximum resident estimates in this section. This is due to the wide range of bedroom numbers across these properties. SDA payments for these Legacy properties will phase out between 2026 and 2029.

All figures exclude **in-kind SDA arrangements** unless otherwise stated.

You should consider these supply figures alongside participant data presented earlier in the report. **Supply reflects enrolled dwellings, while indicators of demand include participant decisions and recorded need, although these may not reflect actual utilisation.** Differences between the distribution of enrolled dwellings and participant data may indicate areas where supply and demand are not fully aligned.

3.2 Number of enrolled SDA dwellings

As at 31 December 2025, there are 13,297 enrolled SDA dwellings.

- 24% increase (+2,548 dwellings) since December 2024.
- 28,400 (approximately) resident places, excluding Legacy properties.
- 55% market growth over two years (from 8,590 dwellings in December 2023).

Table 11: Quarterly increases in enrolled dwellings as at December 2025, including December 2024 as a baseline reference point.

Financial Year Quarter	Total Enrolled Dwellings	Quarter-on-Quarter Change
December 2024 (baseline)	10,749	N/A
March 2025	11,360	+611
June 2025	11,642	+282
September 2025	12,396	+754
December 2025	13,297	+901

Growth in enrolled dwellings remained strong in 2025 (25% in 2024, 24% in 2025).

Quarter-on-quarter increases were recorded in every quarter during 2025, and data shows a faster pace of growth compared to 2024. Average quarterly growth increased from around 4.7% in 2024 to approximately 5.3% in 2025.

3.3 Enrolled dwellings by SDA type

At 31 December 2025, the composition of enrolled SDA dwellings is:

- **New Build**: 9,244 (70%)
- **Existing**: 3,714 (28%)
- **Legacy**: 162 (1%)
- **New Build (Refurbishment)**: 177 (1%)

The number of New Build dwellings **increased by 2,643 dwellings** over the 2025 calendar year. This is a 39% increase and includes 4,556 bedrooms. This is a continuation of the trend observed since 2023–24, when New Build stock surpassed Existing stock for the first time.

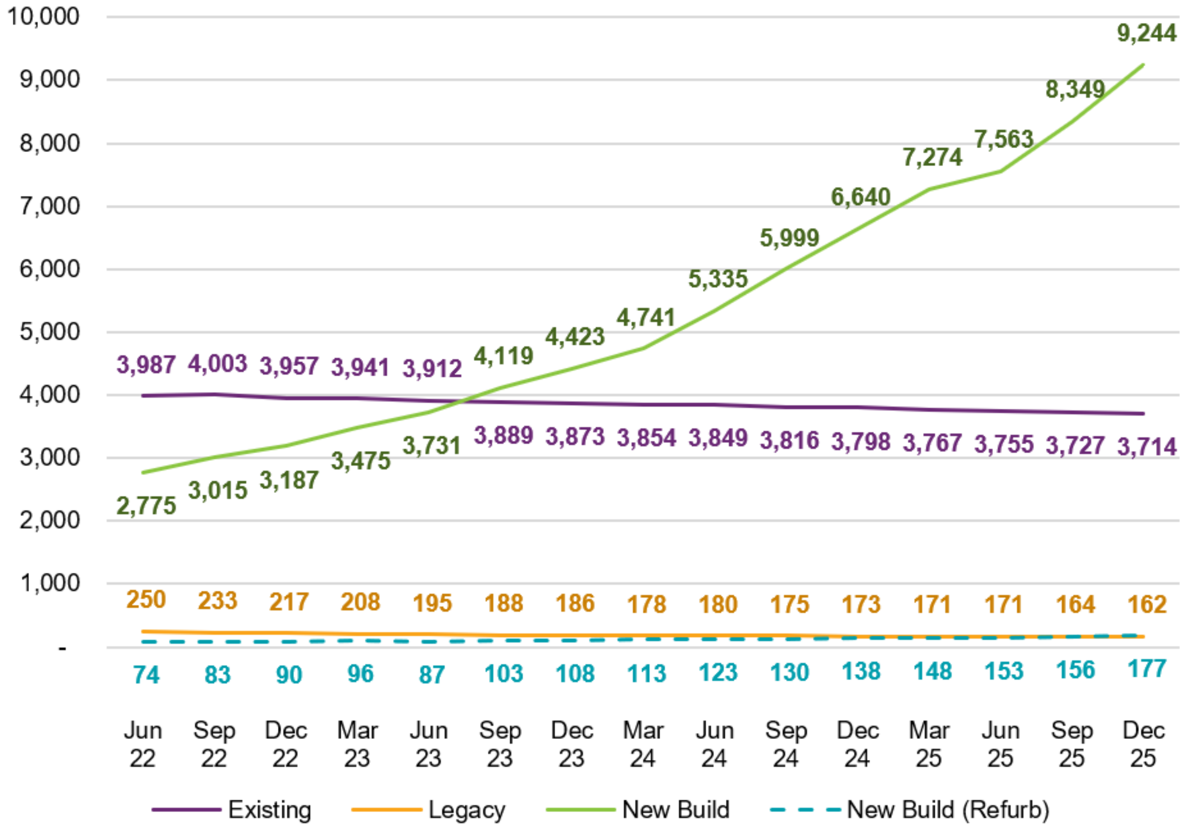
Existing stock continued its gradual decline from 3,798 to 3,714 dwellings (237 bedrooms) as older properties exit the market.

Legacy stock reduced from 173 to 162 dwellings (66 bedrooms), consistent with the anticipated phase-out of SDA payments between 2026 and 2029. Of these 162, 9 currently have a dwelling price of $0. This is because Legacy SDA dwellings with 11+ residents are no longer eligible for SDA payments.

Table 12: Annual change in enrolled dwellings by SDA type.

SDA type	Dec 2023	Dec 2024	Dec 2025	Change (2024-2025)
New Build	4,423	6,640	9,244	+2,604 (+39.2%)
Existing	3,873	3,798	3,714	−84 (−2.2%)
New Build (Refurbishment)	108	138	177	+39 (+28.3%)
Legacy	186	173	162	−11 (−6.4%)
Total	**8,590**	**10,749**	**13,297**	**+2,548 (+23.7%)**

Figure 7: Number of enrolled SDA dwellings by type.



3.4 Design category distribution

Table 13: Annual change in enrolled SDA dwellings by design category.

Design category	Dec 2023	Dec 2024	Dec 2025	Change (2024–2025)
High Physical Support	3,120	4,522	6,439	+1,917 (+42.4%)
Improved Liveability	1,536	1,731	2,025	+294 (+17.0%)
Robust	825	1,323	1,661	+338 (+25.5%)
Fully Accessible	1,018	1,145	1,209	+64 (+5.6%)

Design category	Dec 2023	Dec 2024	Dec 2025	Change (2024–2025)
Basic	2,055	1,987	1,907	−80 (−4.0%)
Multi-Design Category	36	41	56	+15 (+36.6%)
Total	**8,590**	**10,749**	**13,297**	**+2,548 (+23.7%)**

High Physical Support remains the largest and fastest-growing design category. It accounted for approximately 75% (1,917 dwellings) of all new SDA enrolments in 2025. The High Physical Support design category now represents 48% of all enrolled SDA dwellings (previously 42% in December 2024 and 36% in December 2023).

The growth of this design category may be due to SDA investor preference to focus on building to a design category which can support a broader range of participants with an SDA need.

One impact of the SDA Pricing Review completed in June 2023, has also been to reduce the price difference across design categories. As a result, from 1 July 2023 providers who, for example, are seeking to fill a High Physical Support dwelling face less financial impact when accepting participants eligible for Improved Liveability or Fully Accessible.

Robust recorded the second-strongest growth in dwelling numbers (+338 dwellings). This reflects increasing recognition of the need for purpose-built housing for participants with complex support requirements.

Improved Liveability (+294 dwellings) outpaced Fully Accessible (+64 dwellings).

Basic continued its gradual decline as older Existing and Legacy stock exits the market.

Figure 8: Number of enrolled SDA dwellings by design category.

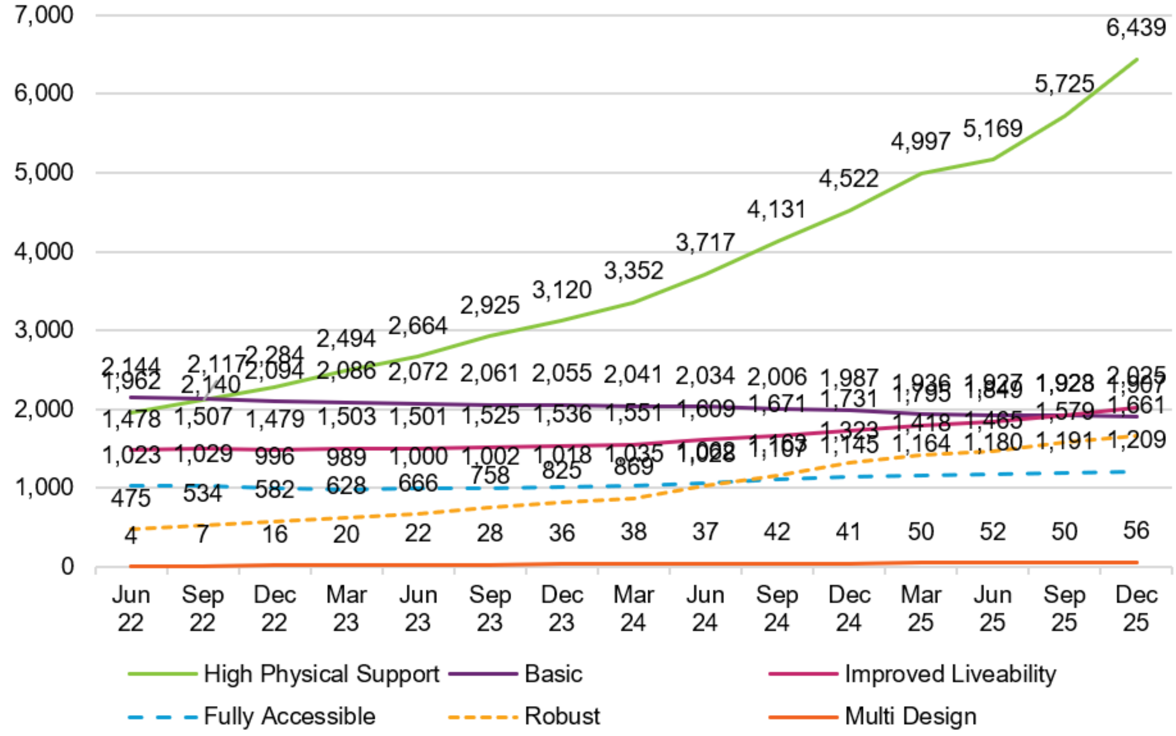
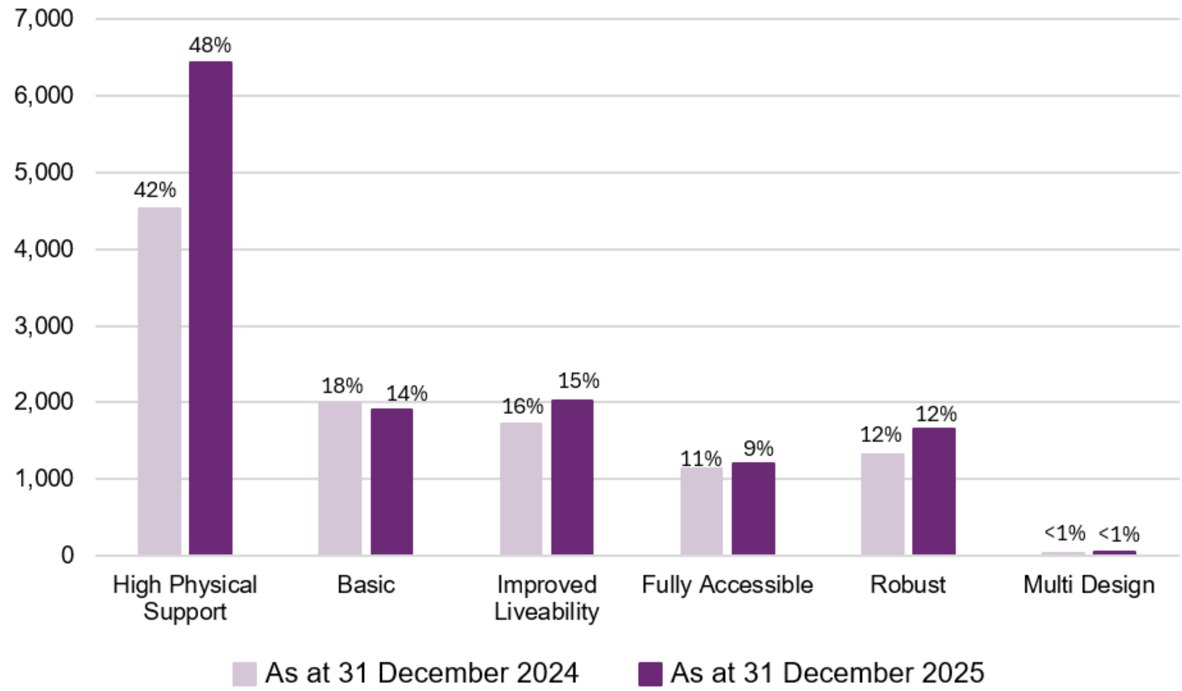


Figure 9: Composition of enrolled SDA by design category.



3.5 Growth by location

State and territory growth

All states and territories recorded growth in enrolled SDA dwellings during 2025.

Table 14: Annual change in enrolled SDA by state / territory.

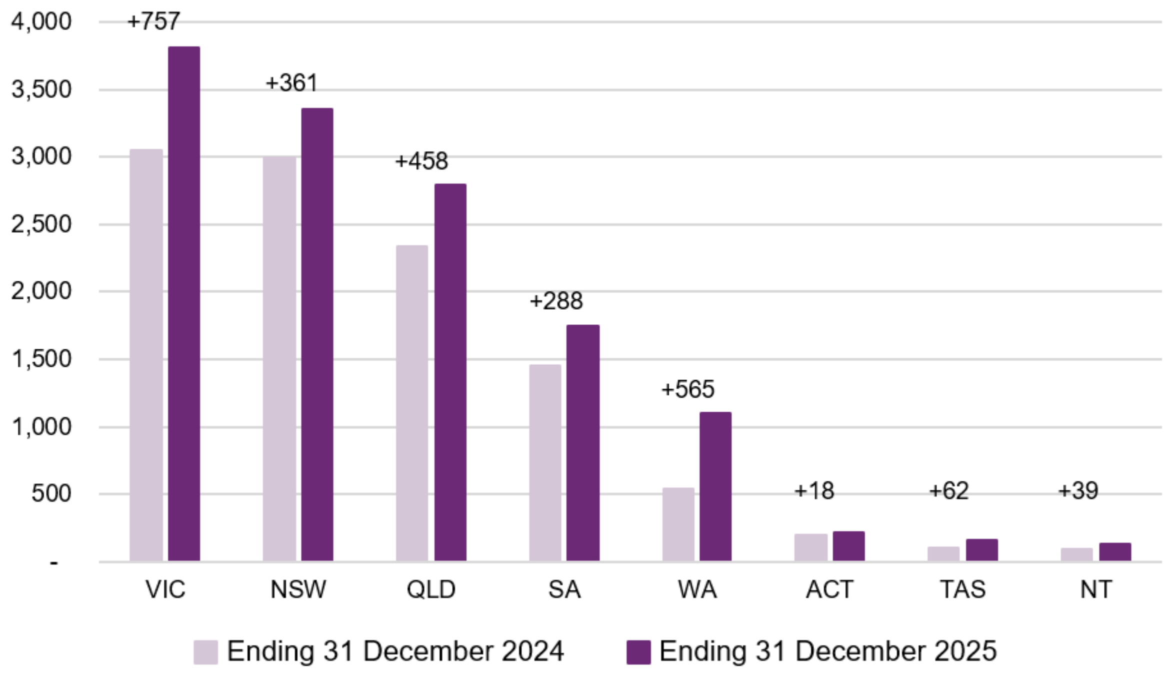
State / territory	Dec 2024	Dec 2025	Change	% Change
NSW	2,988	3,349	+361	+12.1%
VIC	3,048	3,805	+757	+24.8%
QLD	2,332	2,790	+458	+19.6%
WA	536	1,101	+565	+105.4%
SA	1,455	1,743	+288	+19.8%
TAS	100	162	+62	+62.0%
ACT	195	213	+18	+9.2%
NT	95	134	+39	+41.1%
Total	**10,749**	**13,297**	**+2,548**	**+23.7%**

Western Australia recorded the largest percentage growth in enrolled dwellings in 2025, adding 565 new dwellings (+105%). Notably, September 2025 marked the first time enrolled dwellings in Western Australia exceeded dwellings at the design stage.

Tasmania recorded the second-highest percentage growth at 62%, from a smaller base of 100 dwellings.

Victoria (+757 dwellings) and Western Australia (+565 dwellings) were the largest contributors to national growth in enrolled dwellings by volume.

Figure 10: Growth in the number of enrolled SDA dwellings for each state and territory.



Statistical area 4 regions with the highest growth in enrolled dwellings

Table 15: Enrolled SDA dwellings in the 10 statistical area 4 (SA4) regions with the greatest growth.

SA4 region	Dec 2024	Dec 2025	Growth
WA – Perth South East	148	306	+158
VIC – Melbourne West	577	712	+135
VIC – Melbourne South East	354	488	+134
WA – Perth South West	126	258	+132
SA – Adelaide North	521	636	+115

SA4 region	Dec 2024	Dec 2025	Growth
SA – Adelaide South	369	458	+89
VIC – Geelong	195	280	+85
VIC – Melbourne North-East	298	376	+78
WA – Perth North-West	110	186	+76
WA – Mandurah	32	104	+72

Western Australia SDA growth

Three Perth sub-regions and Mandurah collectively added 438 dwellings. This is more than a quarter of Western Australia's total enrolled stock growth since December 2024.

Data suggests that factors such as location and cost are influencing SDA development. This has led to supply increases in metropolitan areas and limited supply elsewhere such as regional and remote communities.

Victorian metropolitan regions feature prominently

Melbourne West and Melbourne South-East recorded the second and third highest absolute growth nationally (+135 and +134 dwellings respectively).

3.6 Enrolled dwellings by maximum residents

The SDA market has continued to shift away from constructing large group living arrangements. The market is moving toward smaller dwelling configurations, such as single, two and three-resident dwellings.

Figure 11: Distribution of 13,297 enrolled SDA dwellings by maximum number of residents, December 2025.

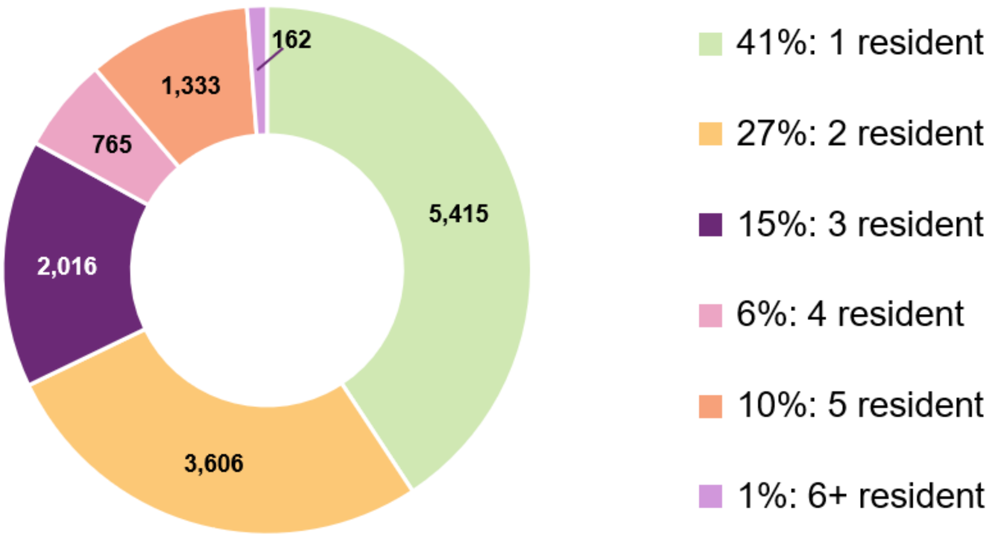


Table 16: Annual change in enrolled SDA by maximum residents.

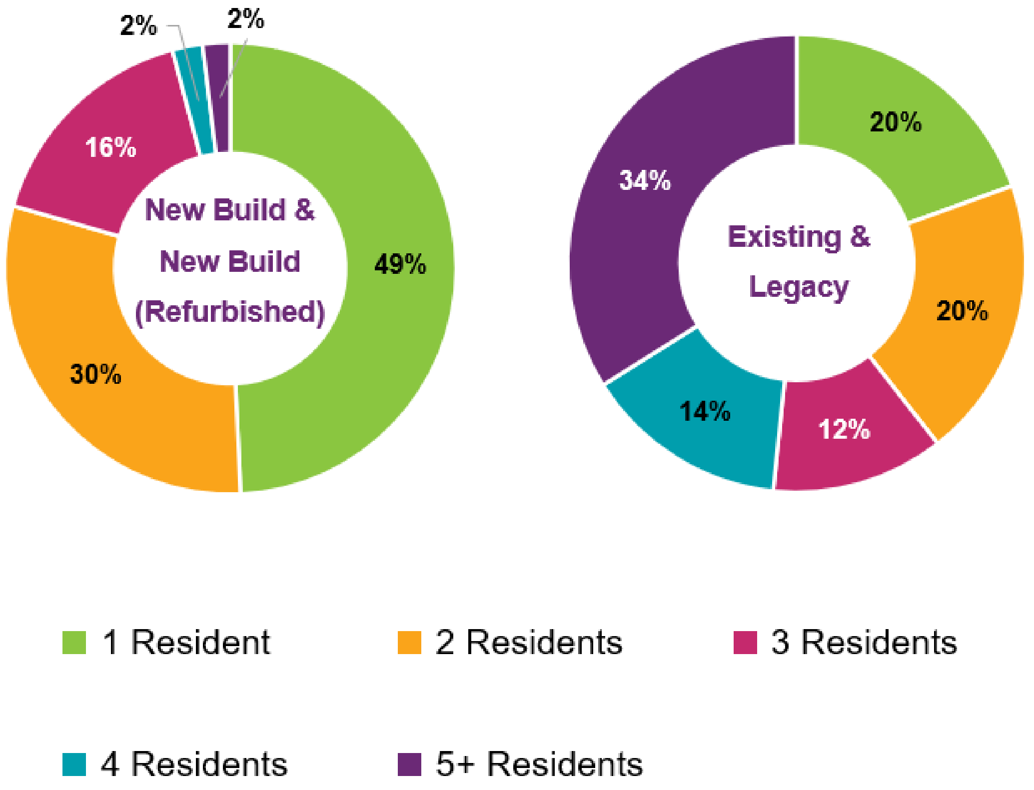
Maximum residents	Dec 2023	Dec 2024	Dec 2025	Change (2024-2025)
1 Resident	3,308	4,305	5,415	+1,110 (+25.8%)
2 Residents	1,715	2,521	3,606	+1,085 (+43.0%)
3 Residents	1,230	1,625	2,016	+391 (+24.1%)
4 Residents	747	765	765	0 (0.0%)
5 Residents	1,394	1,360	1,333	−27 (−2.0%)
6+ Residents (Legacy)	196	173	162	−11 (−6.4%)

As at December 2025:

- Single-resident dwellings remained the largest category, representing 41% of all enrolled SDA stock.
- Two-resident dwellings recorded the highest proportional growth at 43%.
- Three-resident dwellings recorded a modest increase.
- Four-resident dwellings were unchanged. This reflects the market's reduced investment in larger group living arrangements.
- Five-resident dwellings continued to decline in number, as expected.
- Six+ resident dwellings (Legacy) declined modestly from 173 to 162. This is consistent with the phase-out trajectory.

Note:
Single resident dwellings are not limited to apartment developments. Villa, duplex and townhouse developments account for 43% of enrolled single resident dwellings. This reflects a shift away from earlier apartment led supply.
Since 1 July 2023, single-resident villa, duplex and townhouse enrolments have grown by 143%, compared to 79% growth in apartments.

Figure 12: Distribution of enrolled SDA dwellings by maximum number of residents and SDA type, December 2025.



3.7 Enrolled dwellings by building type

Table 17: Enrolled SDA dwellings by building type.

Building type	Dec 2024	Mar 2025	Jun 2025	Sep 2025	Dec 2025
House (2–3 residents)	2,736	3,015	3,247	3,771	4,163
Villa/Duplex/Townhouse (1–3 residents)	3,279	3,441	3,542	3,681	3,863
Apartment (1–3 residents)	2,434	2,622	2,580	2,673	3,009

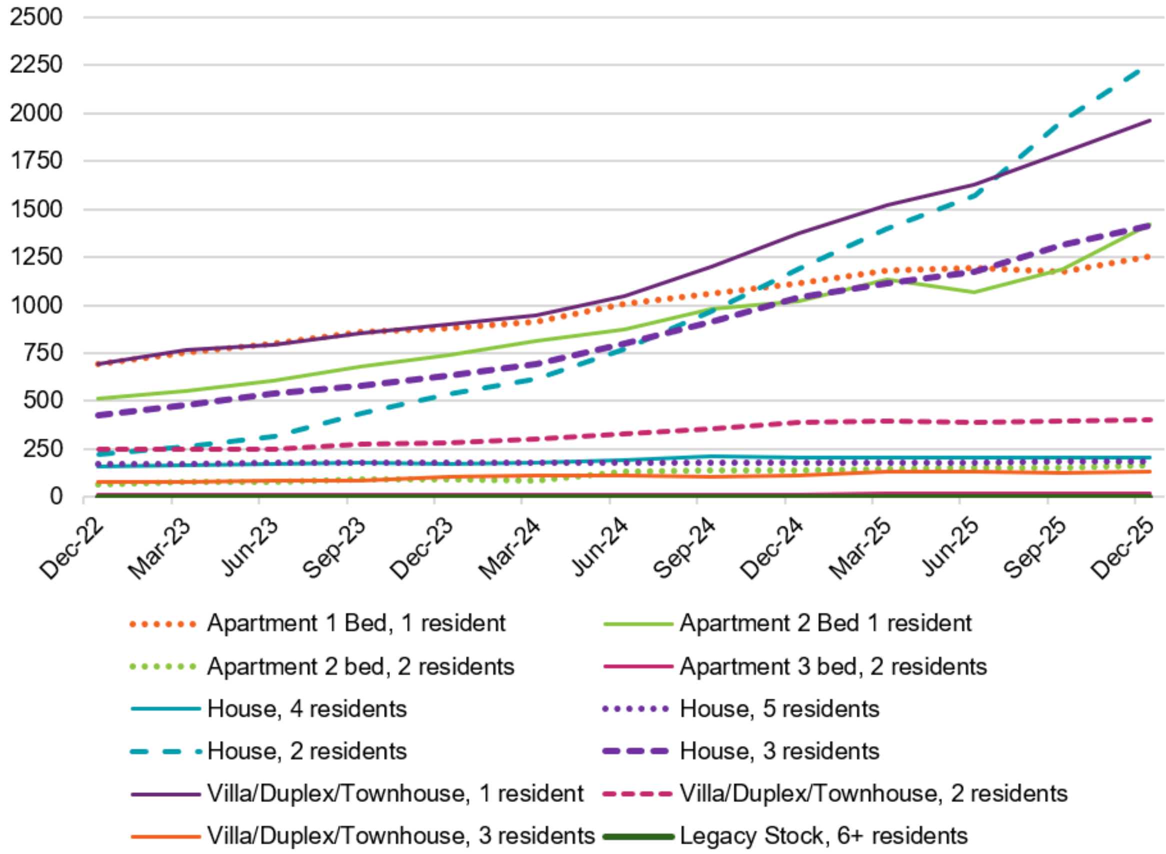
Building type	Dec 2024	Mar 2025	Jun 2025	Sep 2025	Dec 2025
House (4–5 residents)	2,127	2,111	2,102	2,107	2,100
Legacy Stock (6+ residents)	173	171	171	164	162
Total	**10,749**	**11,360**	**11,642**	**12,396**	**13,297**

Houses (2 or 3 residents) recorded the largest growth by enrolment increasing by 1,427 dwellings (+52%) to reach 4,163 at December 2025.

Villa/Duplex/Townhouse (1 to 3 residents) rose by 584 dwellings (+18%) to 3,863 and Apartments increased by 575 (+24%) to 3,009.

Houses (4 or 5 residents) declined marginally from 2,127 to 2,100.

Figure 13: Enrolled New Build and New Build (Refurbished) SDA dwellings by building type.



4. Planned SDA dwellings

Table 18: Planned SDA dwellings snapshot as at 31 December 2025 (with 8,462 registered at design stage).

Design categories	Design stage registration in capital cities	Twelve-month market growth	Two-year market growth
82% Are High Physical Support or Robust	**63%** in capital city locations	**+15%** +1,099 dwellings	**+78%** +3,706 dwellings

This section provides insights into planned SDA dwellings and trends over time.

4.1 Data clarifications

The data collected at the design stage is added to the NDIA's design stage register.

The design stage registrations reflect the total number of dwellings currently registered at the design stage, excluding those that have progressed to enrolment.

This data is intended for the purpose of SDA market oversight only and there is no guarantee from the NDIA that all the dwellings listed on the design stage register will be enrolled as SDA once built. There may also be under-construction properties which are intended to be enrolled as SDA which are not represented in this data.

We have recently updated the way we collect data at design stage.

This helps us to provide SDA stakeholders with more accurate information to support planning and decision making for future SDA.

Providers and investors will be able to better track upcoming SDA development to focus on developing future SDA in areas of need.

Learn more about SDA data improvements.

Note:

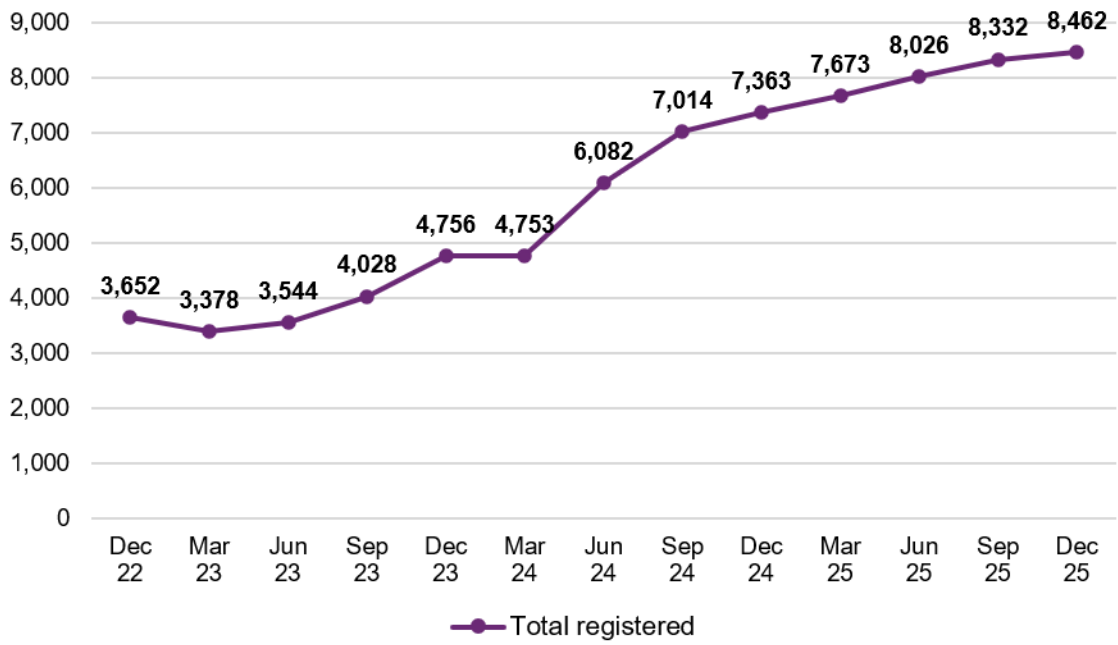
In the Quarterly Report Q3 2025-26 we made changes to the way we manage and report on data for unfinished (unenrolled) SDA dwellings to provide a more reliable view of the potential future supply of SDA.

This has impacted the number of unfinished (unenrolled) dwellings reported in the Q3 showing a decrease in the pipeline.

Further information about this change can be found within the Quarterly Report Q3 2025-26.

4.2 Growth trends in registrations at design stage

Figure 14: Growth of registrations at design stage.



Quarter-on-quarter growth in SDA dwellings registered at design stage.

2024

- Variable but significant growth.
- Saw a significant mid-year spike, particularly in the June quarter. This drove a much higher quarterly and annual growth rate.

2025

- Slower but consistent growth.
- The pace of growth slowed progressively throughout the year, from 4.2% in March to 1.6% by December.

4.3 Growth in planned SDA by state and territory

Table 19: Annual changes in SDA dwellings registered at design stage by state / territory.

State / territory	Dec 2024	Dec 2025	Change	% change
VIC	2,474	2,947	+473	+19%
NSW	1,456	1,643	+187	+13%
QLD	1,601	1,663	+62	+4%
SA	701	944	+243	+35%
WA	823	881	+58	+7%
TAS	154	188	+34	+22%
NT	80	119	+39	+49%

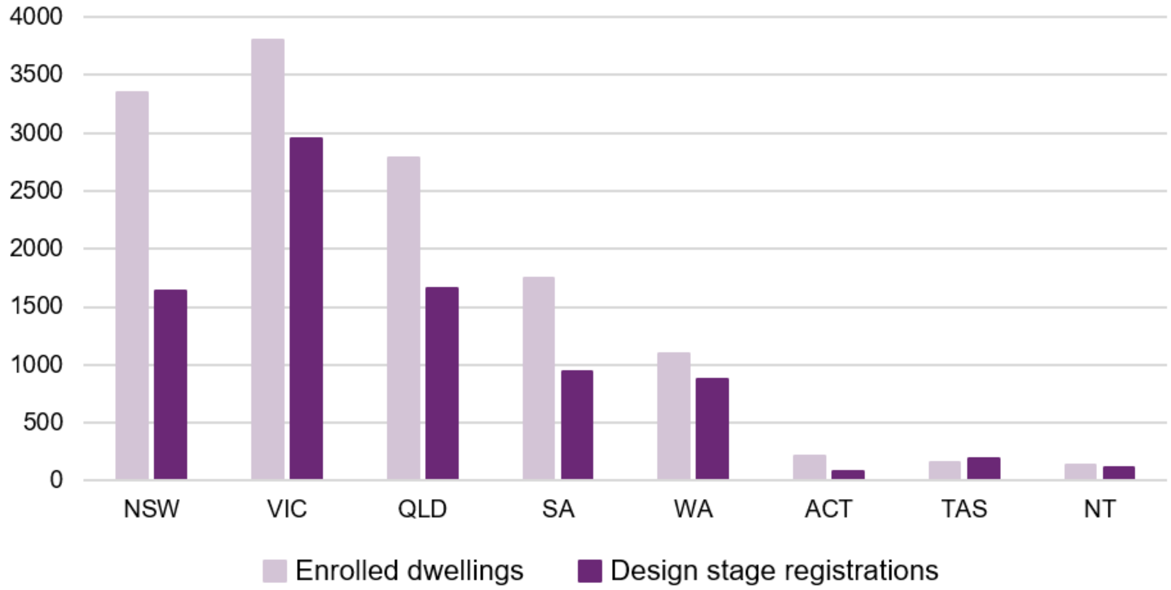
State / territory	Dec 2024	Dec 2025	Change	% change
ACT	74	77	+3	+4%
National	**7,363**	**8,462**	**+1,099**	**+15%**

Victoria, New South Wales and Queensland continue to account for the majority of total design stage growth (75% in 2024 and 74% in 2025). This broadly mirrors the distribution of enrolled stock.

Key design stage callouts:

- **Victoria** recorded the largest absolute increase (+473 dwellings). It continues to have the highest planned supply of SDA (2,947 dwellings registered, 35% of the national total).
- **South Australia** recorded the strongest percentage growth (+35%).
- **Northern Territory** grew fastest among smaller jurisdictions (+49%).
- **Queensland** recorded the lowest design stage registration growth among the larger states (+4%).

Figure 15: Dwellings enrolled and design stage registered by state / territory as at December 2025.



Tasmania has more SDA dwellings registered at the design stage than enrolled dwellings. This has been driven by the following factors:

- The Tasmanian Government initially enrolled their SDA stock via in-kind arrangements. This was phased out on 30 June 2023. These dwellings were not re-enrolled after the phase-out date.
- All currently enrolled SDA stock for Tasmania is investor-owned dwellings.
- Private investors have submitted design stage registrations. This is due to their interest in developing SDA dwellings in Tasmania.

Capital city and regional locations

SDA location is a critical factor when considering SDA investment. Through discussions with stakeholders, we have heard that occupied SDA considers participant needs in terms of proximity to public transport, community, health services, family and friends and support services.

72% of all dwellings registered at design stage are planned for capital cities. This is an increase from 62% in 2024. The key drivers of this are likely to be access to infrastructure, transport and services.

The exception to this is Queensland, where most plans for future SDA are outside of the capital. This is due to the geographical size and number of satellite cities in the state.

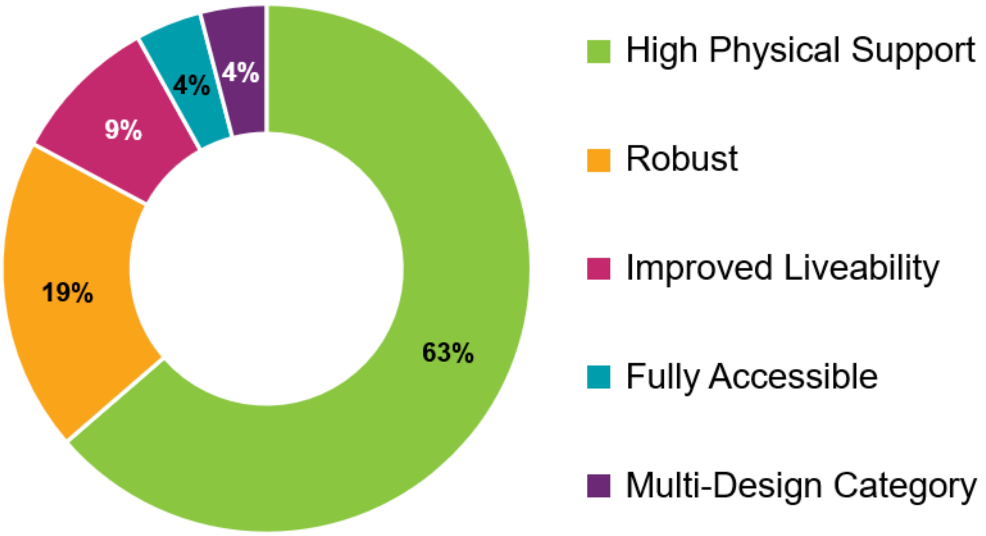
While there is a clear and observable trend towards capital cities, there is still SDA need in regional areas.

Figure 16: Percent of SDA dwellings registered at design stage in capital cities by state / territory, December 2025.

Figure 17: SDA dwellings registered at design stage in capital cities and regional area by state / territory, December 2025.

4.4 Design stage registrations by design category

Figure 18: 8,462 SDA dwellings registered at design stage by design category as at December 2025.



High Physical Support remains the dominant design category registered at the design stage. Robust is the second largest category.

Together, these 2 categories account for over 82% of all design stage registrations.

Figure 19: Dwellings registered at design stage by design category.

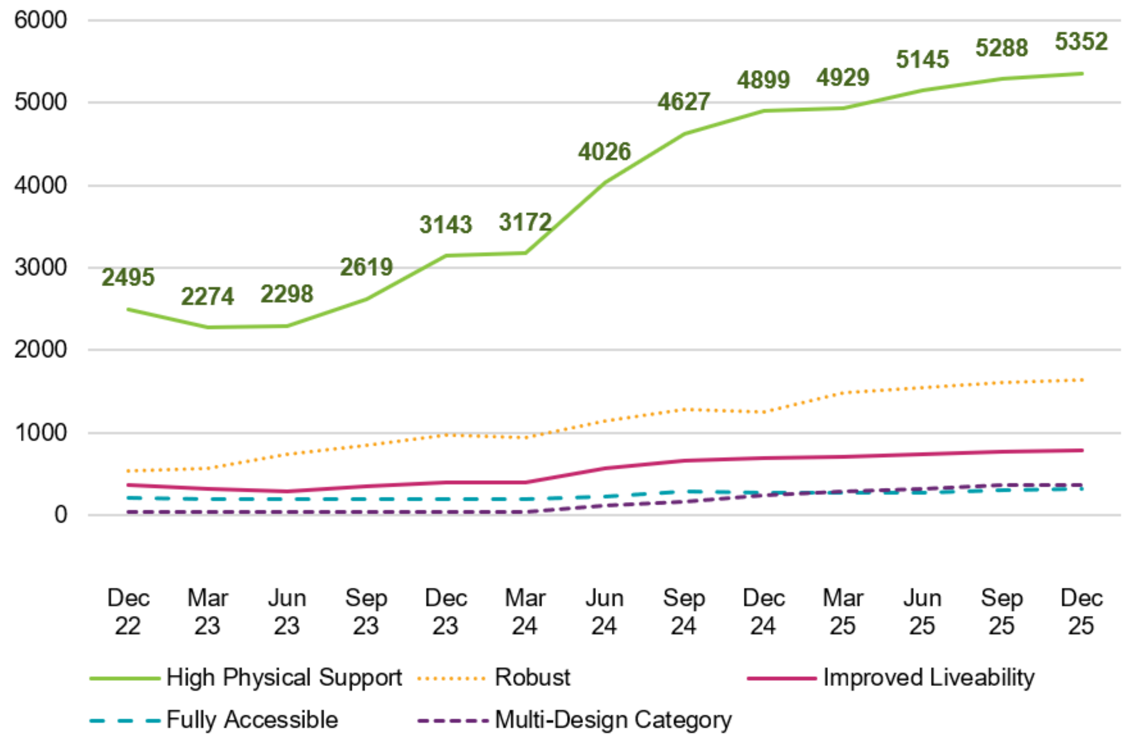


Figure 20: Zoomed in view of dwellings registered at design stage by design category.

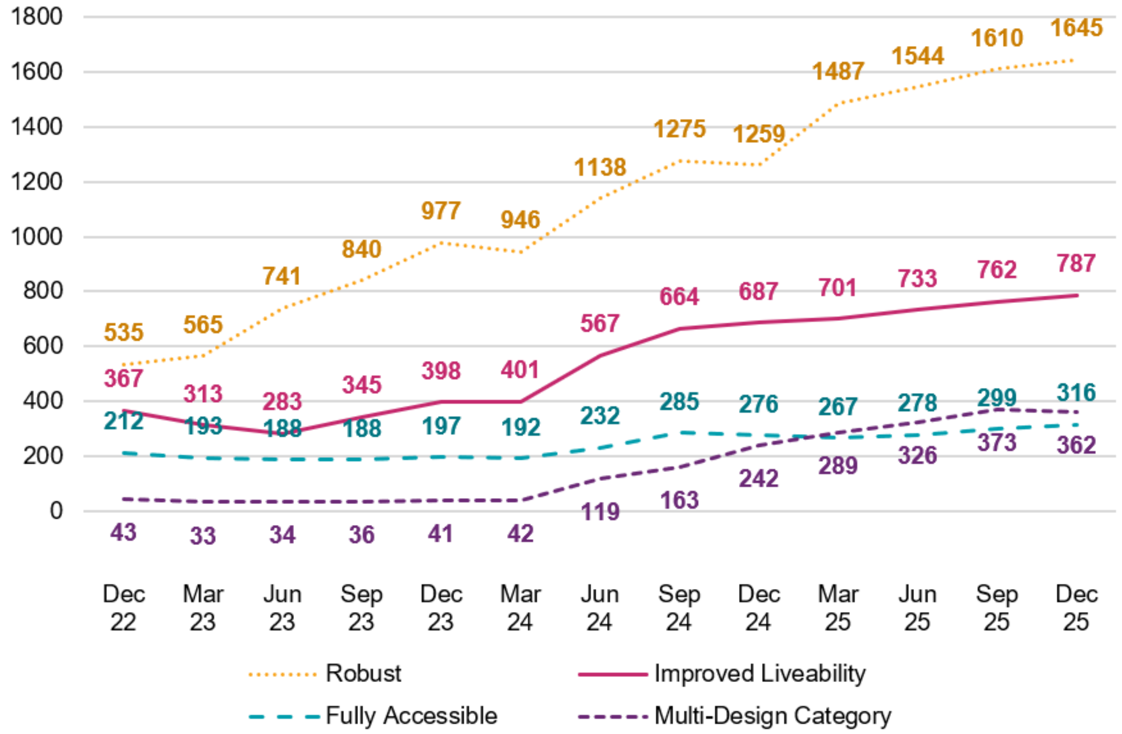


Figure 20 shows a magnified view of design category data shared Figure 19. In this view, High Physical Support data is not shown.

4.5 Trends by building type and design category

Data shows trend changes in design stage registrations from December 2024 to December 2025.

What's growing?

- 2 resident High Physical Support houses (+27%).
- Fully Accessible Villa / Duplex / Townhouses (+15%).
- Robust Villa / Duplex / Townhouses (+22%).
- 2 resident Robust Villa / Duplex / Townhouses (+41%, from 69 to 97).

What's slowing?

- Apartments (an overall decrease is noted).

- High Physical Support apartments (-2.6%).

Figure 21: Quarterly changes in design stage registrations by building type.

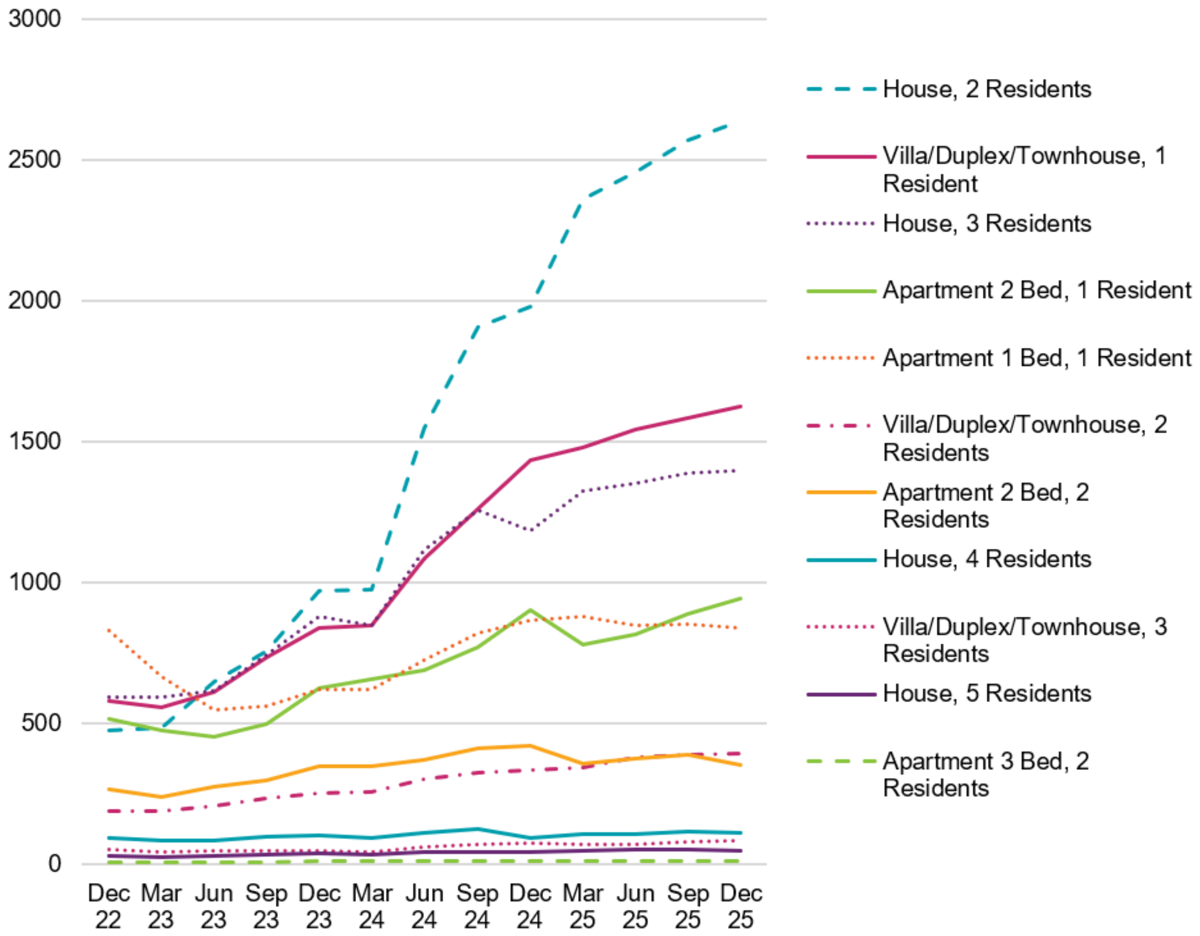
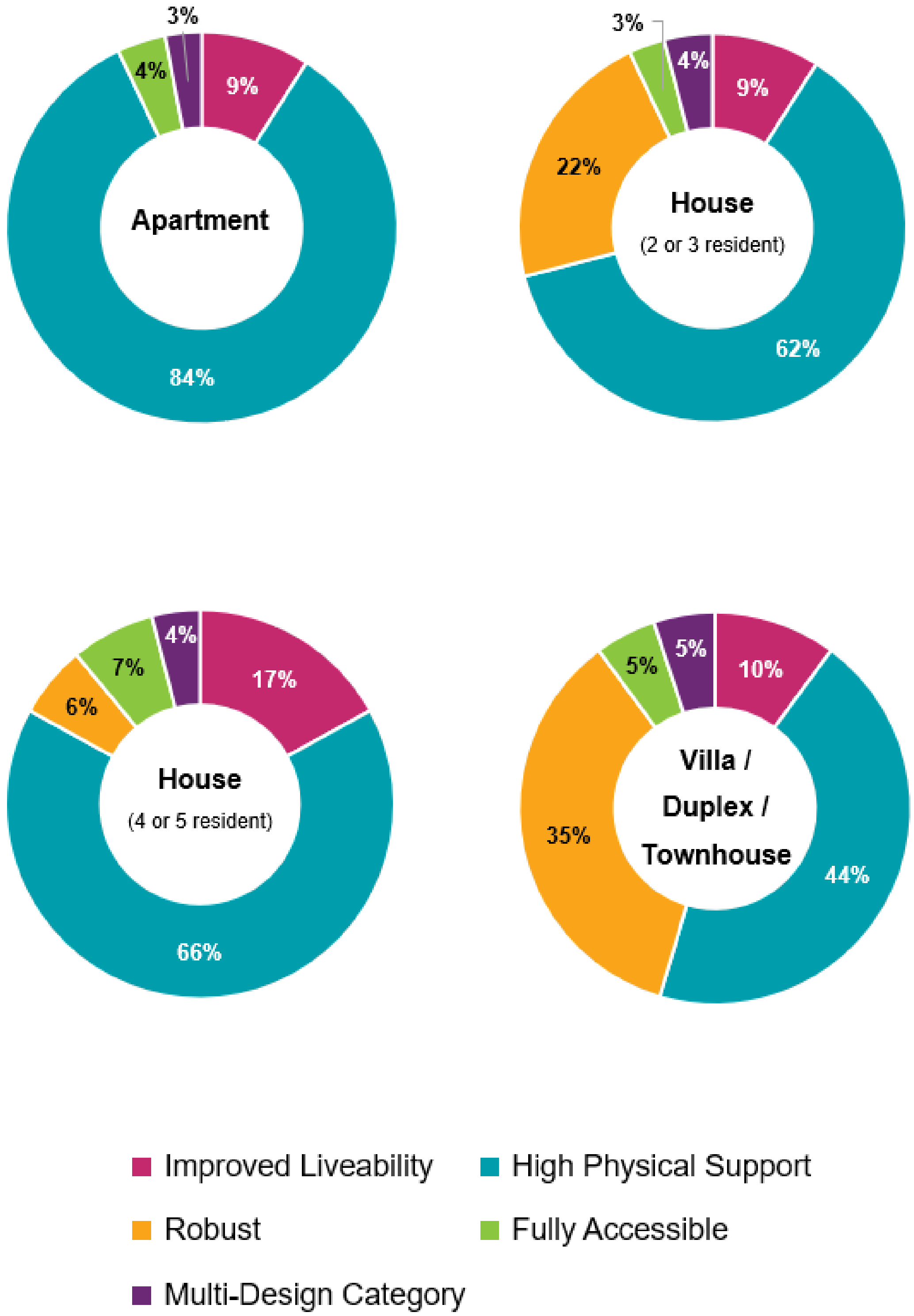


Figure 22: Percentage of design stage registrations by design category and building type as at December 2025.



5. Find more SDA data

This section outlines other data and tools that are available in understanding the landscape of the SDA market.

The information shared within this report accompanies the SDA data released quarterly through the NDIA's Quarterly Reports.

You can also find more SDA data and reports at these online locations:

- NDIS data and research website
  - SDA data a page that brings together SDA related data and reports
  - Explore Tool an interactive tool where data can be filtered and downloaded according to requests
- SDA Finder an online tool where SDA providers can list vacancies within SDA properties and participants can search for accommodation vacancies that match their needs
- SDA Demand an online tool to help understand SDA demand to the Statistical Area 3 (SA3) level and ability to download datasets.

5.1 Data disclaimer

The data provided in this report is for the purpose of enabling public insight into the operation of the NDIS, specifically SDA. As this report is public data please refer to the full data disclaimer that explains and applies to the content within this report.

6. Feedback

We welcome your feedback on ways to improve this report. Feedback and comments will be considered for future editions.

Contact us at sdahousing@ndis.gov.au

7. Glossary

Specialist Disability Accommodation

Specialist disability accommodation (SDA) is a range of housing designed for people with extreme functional impairment or very high support needs.

SDA is designed to be more accessible for participants based on their disability related support needs. It assists participants to live more independently in their home and allows other supports to be delivered better or more safely. For example, participants might need a home with reinforced ceilings so a ceiling hoist can be installed.

SDA does not include the services or the funded support participants might get in their home that relate to their disability supports needs. For example, personal care supports, supported independent living, individualised living options and some assistive technology are other types of home and living support that may be funded.

Home and living recommendation

A home and living recommendation refers to the home and living supports a participant is eligible for under the NDIS. This can include supports such as SDA, supported independent living, and individualised living options, depending on the participants’ needs.

For SDA, a participants' home and living recommendation will recommend a suitable design category, build type and SDA type. This recommendation takes into account available evidence and the participants' disability support needs. Participants' use this recommendation to guide their search for a suitable SDA dwelling.

Enrolled dwelling

Means a dwelling enrolled by the NDIA under section 26 of the *National Disability Insurance Scheme (Specialist Disability Accommodation) Rules 2020* to provide SDA.

SDA types

Existing

Dwellings built before 1 April 2016 that were used as disability related supported accommodation under a previous state, territory, or Commonwealth scheme. The shared areas and bedrooms for use by SDA eligible participants must substantially comply with the Minimum Requirements of a Design Category other than Basic 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 (for more information, refer to the Pricing Arrangements for Specialist Disability Accommodation 2025-26).

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 NDIS SDA Rules 2020 and the Pricing Arrangements for Specialist Disability Accommodation 2025-26.

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 2025-26. In order to qualify a New Build (Refurbished), providers must spend a minimum amount. These minimum amounts are specified per dwelling type in the Pricing Arrangements for Specialist Disability Accommodation 2025-26.

Refer to the NDIS SDA Rules 2020 for detailed definitions of all the SDA types.

SDA design stage

SDA design stage data is based on information collected by the NDIA from SDA providers who are building properties they intend to enrol as SDA at a later date. This data is intended for the purpose of SDA market oversight only and there is no guarantee from the NDIA that all the dwellings listed will be enrolled as SDA. There may also be under-construction properties which will be enrolled as SDA, and which are not yet represented in the data.

SDA design categories

Basic

Housing without specialist design features but with a location or other features that cater for the needs of people with disability and assist with the delivery of support services.

As per section 8 of the NDIS SDA Rules 2020, from 1 April 2016, New Build dwellings can only be for an SDA design category other than Basic.

Improved Liveability

Housing that has been designed to improve 'liveability' by incorporating a reasonable level of physical access and enhanced provision for people with sensory, intellectual, or cognitive impairment.

Fully Accessible

Housing that has been designed to incorporate a high level of physical access provision for people with significant physical impairment.

Robust

Housing that has been designed to incorporate a high level of physical access provision and be very resilient, while reducing the likelihood of reactive maintenance and reducing the risk to the participant and the community.

High Physical Support

Housing that has been designed to incorporate a high level of physical access provision for people with significant physical impairment and requiring very high levels of support.

Multi-Design

A single dwelling may be certified under multiple design categories however all shared areas must comply with the minimum requirements of all enrolled design categories.

SDA building types

Apartments

Self-contained units that are part of a larger residential building.

Duplexes, villas, and townhouses

Separate but semi-attached properties within a single land title or strata titled area. This also includes stand-alone villas or granny-flats.

Houses

Detached low-rise buildings with garden or courtyard areas.

Group homes

Houses that have 4 or 5 residents. In this report, SDA Group homes are referred to as 4 or 5 resident Houses.

For more detailed information, refer to Schedule 1 in the NDIS SDA Rules 2020 for SDA building types, features, and Building Code of Australia classification for each building type.

Defined program

A defined program refers to state, territory, or Commonwealth disability or mental health programs that existed prior to the NDIS. Participants who were existing clients of these programs and met age and residency requirements became an NDIS participant without generally being required to provide further evidence of their disability.

Supported independent living

Supported independent living (SIL) is a package of paid personal support. It includes things like having someone to help with personal care or cooking meals. It's one type of help or supervision with daily tasks to help participants live as independently as possible and build skills.

Supported independent living is best suited to people with a disability who have higher support needs. This means they need a significant amount of help throughout the day, 7 days a week. This includes overnight support.