# 0Contentsontents

**Provider sentiment and satisfaction survey**

**Fourth national collection**

**September 2020**

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## Executive summary

The NDIA monitors provider sentiment and satisfaction annually as part of the 2020-21 annual goals set out in the NDIS 2020-24 Corporate Plan.

In addition to measuring sentiment and satisfaction, we use the survey responses to identify and prioritise actions that would improve the provider experience.

Providers are essential to participants achieving their goals and the NDIA continues to make a significant effort to resolve concerns raised by providers to improve the Scheme.

### Survey Design

All providers registered to provide support at 31 August and had supplied a valid email address were invited to complete the fourth Provider Sentiment and Satisfaction Survey. A distinction was made between providers who had ever claimed payment from the NDIS (“active providers”) and those who had never claimed payment (“inactive providers”).

It is important to note that the criterion used to distinguish active and inactive providers has limitations. In particular, providers who support participants with a self-managed plan or a plan manager receive payments directly from the participant or the plan manager. As a result, these providers may be classified as “inactive”.

Furthermore, some self-managing participants may use a provider who is not registered, and these providers cannot be surveyed.

Slightly different surveys were developed for active and inactive provider groups. Providers deemed inactive were asked to share their intention to enter the market in the next three months and their views on any barriers to entry they may be facing. Active providers were asked an additional question about claim processing times.

The latest survey has taken place in the midst of the global COVID-19 pandemic, providing an opportunity to ask about providers’ experiences during this period. Three additional questions were included, focusing on business disruption, changes to the business model, and opinions on the NDIA response to the COVID-19 pandemic.

### Participation rates

The fourth Provider Sentiment and Satisfaction Survey (Q1 2020-21) was open from 17 September 2020 to 4 October 2020. A total of 14,563 registered providers were invited to participate, including 11,498 active and 3,065 inactive providers.

2,842 responses were received: 2,580 from active providers and 262 from inactive providers. The participation rates were 20% overall, 22% for active providers and 9% for inactive providers. For the previous survey undertaken in September 2019 (Q1 2019-20), participation rates were 18% overall, 23% for active providers and 10% for inactive providers. Whilst the participation rates were marginally lower for both active and inactive providers in the latest survey, the overall participation rate was slightly higher, due to a higher proportion of active providers, who are more likely to respond.

Providers receiving higher payments from the NDIS in the last three months prior to the survey were found to be more likely to participate.

### Headline indicator - sentiment

The headline indicator for provider sentiment is “I am optimistic about the health of the NDIS market”.

Following a slight dip for the second survey, opinions have improved considerably over the most recent two surveys. Overall, 59% of providers agreed or strongly agreed that they were optimistic about the health of the NDIS market, up 12 percentage points from 47% in Q1 2019-20. This follows a 9 percentage point increase between Q2 2018-19 and Q1 2019-20. Conversely, 20% of providers disagreed or strongly disagreed, down 11 percentage points since the previous survey.

The extent of improvement was slightly greater for active providers, where the percentage strongly agreeing or agreeing increased by 13 percentage points, from 46% to 59%. For inactive providers there was an 11 percentage point increase, from 50% to 61%.

### Headline indicator – satisfaction

The headline indicator for provider satisfaction is “On a scale of 1 to 10, with 1 being the least positive and 10 being the most positive, how would you rate your overall experience of interacting with the NDIA?”

For all providers who responded in Q1 2020-21, the average score was 6.2 (the same for both active providers and inactive providers), an increase of 0.9 (from 5.3) in Q1 2019-20.

### Provider experiences during the COVID-19 pandemic

The following 3 additional questions were included in the Q1 FY2020-21 survey:

1. Has your business experienced disruption due to the coronavirus?
2. Do you have plans to or have you made changes to your business model to adapt to market conditions created by the coronavirus?
3. On a scale of 1 to 10, with 1 being the least positive and 10 being the most positive, how would you rate the NDIA’s response throughout the COVID-19 situation?

Overall, 46% of providers said their business was trading as normal or higher, but this percentage was higher for active providers (48%) than for inactive providers (36%). Around 50% of providers (the same for both active and inactive providers) said their business was trading but at a reduced rate.

1.8% of providers said they had chosen to close their business due to the coronavirus, and 2.1% said they had been forced to close due to coronavirus restrictions. In almost all cases the closure was temporary, with only a few providers saying they were not planning to reopen.

Overall, 62% of providers said they had either made changes or planned to make changes to their business model to adapt to market conditions created by the coronavirus: 63% of the active providers compared to 55% of the inactive providers surveyed.

Regarding the NDIA’s response throughout the COVID-19 situation, on a scale of 1 to 10, with 1 being the least positive and 10 being the most positive, the average score was 6.8 for both active providers and overall, and 6.6 for inactive providers. 62% of active providers and 59% of inactive providers gave a score of 7 or more.

## Survey participation rates

The fourth Provider Sentiment and Satisfaction Survey was open from 17 September 2020 to 4 October 2020.

As shown in Figure 1, a total of 14,563 registered providers were invited to participate: 11,498 active and 3,065 inactive providers. All providers registered as at 31 August 2020 and for whom the NDIA had a valid email address were contacted.

The number of providers has decreased since the last survey conducted in September 2019: active providers from 12,569 to 11,498 and inactive providers from 8,583 to 3,065. This change was due to registration lapses, and was most pronounced for inactive providers. As a result, the proportion of active providers has increased, from 59% in September 2019 to 79% in September 2020.

**Figure 1 Number of providers by status**

Figure 1 Number of providers by status.
For Q4 2017-18 48 percent of provider responders were active providers and 52 percent were inactive. The total number of providers invited was 15,649. 
In Q2 2018-19 59 percent of providers active providers and 41 percent were inactive. 16,665 providers were invited to participate. 
In Q1 2019-20 59 percent of providers were active providers and 41 percent were inactive. 21,152 were invited to participate. 
In the latest survey Q1 2020-21, 79 percent of providers were active and 21 percent were inactive. 14,563 providers were invited to participate. 

2,842 responses were received: 2,580 from active providers and 262 from inactive providers.

The overall response rate was 20%. Active providers have a higher response rate than inactive providers. The participation rate for active providers has remained relatively stable at 22%, compared to 23% for Q1 2019-20. The participation rate for inactive providers was 9%, compared to 10% in Q1 2019-20 and 9% Q2 2018-19. Whilst the participation rates were marginally lower for both active and inactive providers in the latest survey, the overall participation rate was slightly higher, due to a higher proportion of active providers, who are more likely to respond.

The number of responses received from providers in the inactive group is much lower than for the previous survey (262 responses in Q1 2020-21 versus 870 in Q1 2019-20). This will increase the variability of survey results for inactive providers relative to previous surveys. This should be taken into account when comparing the latest survey results for inactive providers to the previous surveys.

Figure 2 shows the participation rates across the three national surveys, split by fully answered and partially answered responses.

**Figure 2 Participation rates by provider status**Figure 2 Participation rates by provider status.
In Q4 2017-18 2,600 active providers and 1,316 inactive providers participated.
In Q2 2018-19 2,020 active providers and 750 inactive providers participated.
In Q1 2019-20 2,867 active providers and 870 inactive providers participated.
In Q1 2020-21 2,580 active providers and 262 inactive providers participated.
In Q4 2017-18, 35 percent of 
In Q1 2019-20 2,867 active providers and 870 inactive providers participated.
In the latest survey Q1 2020-21 2,580 active providers and 262 inactive providers participated.
In Q4 2017-18, 35 percent of active providers participated. 1 percent of participants only partially answered the questions. For inactive providers in Q4 2017-18, 20 percent responded of which 2 percent did not fully answer.
In Q2 2018-19, 20 percent of active providers participated. 1 percent of participants only partially answered the questions. For inactive providers in Q2 2018-19, 9 percent responded of which 1 percent did not fully answer.
In Q1 2019-20, 22 percent of active providers participated. 1 percent of participants only partially answered the questions. For inactive providers in Q1 2019-20, 10 percent responded of which 1 percent did not fully answer.
In Q1 2020 -21, 22 percent of active providers participated. 1 percent of participants only partially answered the questions. For inactive providers in Q1 2020-21, 9 percent responded of which 1 percent did not fully answer.

After a decline following the first survey, participation rates have remained relatively stable for the latest three surveys, for both active and inactive providers.

Most submitted surveys have been fully answered, with partially answered surveys accounting for 5% of all responses from active providers and 12% of inactive providers.

Figure 3 shows participation rates by provider status (active/inactive) and State/Territory of registration. Since a provider can be registered in multiple States/Territories, each response is counted towards all States/Territories the provider is registered in.

There is some variation in participation rates by State/Territory, with active providers in WA (30%), TAS, ACT and the NT having higher participation rates, and providers in NSW (19%) having the lowest participation rate. For inactive providers, those based in ACT, SA and WA have higher participation rates, while no providers from TAS responded.

**Figure 3 Participation rates by State/Territory and status**

Figure 3 Participation rates by State/Territory and status.
In ACT 27 percent of active providers responded and 13 percent of inactive providers responded. ACT has 2 percent of registrations. 
NSW had a 19 percent participation rate for active providers and 8 percent for inactive providers. NSW has a 38 percent share of registrations.
The NT had 26 percent of active providers respond and 7 percent of inactive providers respond. The NT has a 1 percent share of registrations. 
QLD had 22 percent of active providers respond and 8 percent of inactive providers respond. QLD has a 20 percent share of registrations. 
SA had 23 percent of active providers respond and 12 percent of inactive providers respond. SA has a 6 percent share of registrations.
Tasmania had 27 percent of its active providers respond and zero responses from inactive providers. Tasmania has 2 percent of registrations. 
Victoria had 25 percent of its active providers respond and 8 percent of its inactive providers respond. Victoria has 25 percent of registrations. 
Western Australia had 30 percent of its active providers respond and 12 percent of its inactive providers respond. WA has 6 percent of registrations. 

Note: percentages under the bars are the percentages of providers with registrations in the State/Territory

Figure 4 displays participation rates by entity type (organisation vs sole trader) separately for active and inactive providers. Organisations appear to have higher participation rates than sole traders, across both active and inactive providers.

**Figure 4 Legal entity type distributions and participation rates**

Figure 4 Legal entity type distributions and participations rates.
61 percent of active providers had an organisation status and 39 percent were sole traders. 56 percent of inactive providers had an organisation status and 44 percent were sole traders.
25 percent of active organisations responded and 19 percent of active sole traders responded. 
9 percent of inactive organisataions responded and 8 percent of inactive sole traders responded. 


## Survey responses

### Business characteristics

The following graphs summarise the business characteristics for providers who responded to the fourth survey.

**Figure 5 Business characteristics of the fourth survey respondents**

Section 1: Business characteristics, Question 1. 
How many people are currently employed by your business? (Please provide an estimate based on ful-time equivalent. Include business owner if your business is a sole proprietorship).
The majority of respondents have between 1 and 9 employees. The proportion of providers with a low number of employees is higher among active providers. Compared to the previous survey, active providers have a lower percentage in the "Between 1 and 9" category (59 percent compared to 66 percent) and a higher percentage in the "Between 20 ad 199" category (24 percent compared to 19 percent).
59 percent of active providers had between 1 and 9 employees. 85 percent of inactive providers had between 1 and 9 employees.
12 percent of active providers had between 10 and 19 employees and 6 percent of inactive providers had between 10 and 19 employees. 
24 percent of active providers had between 20 and 199 employees. 6 percent of inactive providers had between 20 and 199 employees. 
6 percent of active providers had 200 or more employees and 2 percent of inactive providers had 200 or more employees.


Section 1: Business characteristics, Question 2.
Approximately what percentage of your business' service activity is in disability support?
11 percent of active providers and 35 percent of inactive providers had 10 percent or less of their activity in disability support (slightly lower than previous survey).
6 percent of active providers and 8 percent of inactive providers had between 10 percent and 20 percent of their activity in disability support.
5 percent of active providers and 5 percent of inactive providers had between 20 percent and 30 percent of their activity in disability support.
4 percent of active providers and 2 percent of inactive providers had between 30 and 40 percent of their activity in disability support.
3 percent of active providers and 4 percent of inactive providers had between 40 and 50 percent of their activity in disability support.
5 percent of active providers and 3 percent of inactive providers had between 50 and 60 percent of their business activity in diability support.
5 percent of active providers and 2 percent of inactive providers had between 60 and 70 percent of their business in disablity support. 
6 percent of active providers and 3 percent of inactive providers had between 70 and 80 percent of their business in disability support.
8 percent of active providers and 3 percent of inactive providers had between 80 percent and 90 percent of their business in disability support.
47 percent of active providers and 35 percent of inactive providers had 90 percent or more of their business in disability support. This was slightly higher than the previous year of 42 percent and 27 percent  respectively. 


Section 1: Business characteristics, Question 3.
Approximately what percentage of your business' service activity is funded by the NDIS?
For active providers 13 percent and for inactive providers 42 percent said that 10 percent or less of their service activity is funded by the NDIS.
7 percent of active providers and 6 percent of inactive providers said between 10 and 20 percent of their activity is funded by the NDIS.
6 percent of active providers and 4 percent of inactive providers said between 20 and 30 percent of their activity is funded by the NDIS.
5 percent of active providers and 3 percent of inactive providers said between 30 and 40 percent of their activity is funded by the NDIS.
4 percent of active providers and 2 percent of inactive providers said between 40 and 50 percent of their activity is funded by the NDIS.
6 percent of active providers and 3 percent of inactive providers said between 50 and 60 percent of their activity is funded by the NDIS.
6 percent of active providers and 2 percent of inactive providers said between 60 and 70 percent of their activity is funded by the NDIS.
8 percent of active providers and 3 percent of inactive providers said between 70 and 80 percent of their activity is funded by the NDIS.
11 percent of active providers and 6 percent of inactive providers said between 80 and 90 percent of their activity is funded by the NDIS.
35 percent of active providers and 29 percent of inactive providers said 90 percent of their activity or more is funded by the NDIS, which is higher than for last year's 27 percent and 18 percent respectively. Although inactive providers have not received payments directly from the NDIS, they may be providing in-kind services or supporting participants who self-manage their plans.


### Business conditions (in general)

The following graphs summarise the responses of the last four national provider surveys.

Though the results from the previous three surveys are displayed to facilitate comparison of responses over time, it is important to note that responses from each collection displayed in the graphs are not based on the same providers. To the extent that active and inactive providers respond differently, overall results will also reflect changes in the mix of active and inactive providers over time.

The unanswered responses and categories “Don’t know” and “Not applicable” were removed. Categories “Strongly agree and “Agree” were combined, and categories “Disagree” and “Strongly disagree” were also combined.

**Figure 6 Business conditions**

Section 2: Business conditions, Question 4.
I am optimistic in the next 12 months the business will be able to attract and retain workers.
The proportion of providers who are optimistic about their ability to hire and retain workers has been increasing over time, across both active and inactive providers. Inactive providers are incrementally more optimistic than active providers on this indicator. 
In Q4 FY 18, 48 percent of active providers strongly agreed or agreed, 24 percent neither agreed nor disagreed and 28 percent strongly agreed or disagreed.
In Q2 FY 19, 63 percent of active providers strongly agreed or agreed, 19 percent neither agreed nor disagreed and 18 percent strongly agreed or disagreed.
In Q1 FY 20, 66 percent of active providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 18 percent strongly agreed or disagreed.
In Q1 FY 21, 71 percent of active providers strongly agreed or agreed, 15 percent neither agreed nor disagreed and 14 percent strongly agreed or disagreed.
For inactive providers, in Q4 FY 18, 48 percent strongly agreed or agreed, 31 percent neither agreed nor disagreed, and 21 percent strongly disagreed or disagreed. 
In Q2 FY 19, 67 percent of inactive providers strongly agreed or agreed, 19 percent neither agreed nor disagreed, and 14 percent strongly disagreed or disagreed. 
In Q1 FY 20, 69 percent of inactive providers strongly agreed or agreed, 18 percent neither agreed nor disagreed, and 13 percent strongly disagreed or disagreed. 
In Q1 FY 21, 76 percent of inactive providers strongly agreed or agreed, 15 percent neither agreed nor disagreed, and 9 percent strongly disagreed or disagreed. 
For all providers in Q4 FY18, 48 percent strongly agreed or agreed, 26 percent neither agreed nor disagreed and 26 percent strongly disagreed or disageed. 
In Q2 FY 19, for all providers, 64 percent strongly agreed or agreed, 19 percent neither agreed nor disagreed and 17 percent strongly disagreed or disageed. 
In Q1 FY 20, for all providers, 67 percent strongly agreed or agreed, 17 percent neither agreed nor disagreed and 17 percent strongly disagreed or disageed. 
For Q1 FY 21, 71 percent strongly agreed or agreed, 15 percent neither agreed nor disagreed and 14 percent strongly disagreed or disageed. 



Section 2: Business conditions, Question 5
I am optimistic in the next 12 months the amount of NDIS supports and services we provide will increase.
Active providers are becoming more optimistic in relation to the future amount of NDIS supports and services they will provide. Apart from a slight decrease between the second and third surveys, inactive providers are also becoming optimistic.
In Q4 FY 18, 44 percent of active providers strongly agreed or agreed, 21 percent neither agreed nor disagreed and 35 percent strongly disagreed or disagreed.
In Q2 FY 19, 60 percent of active providers strongly agreed or agreed, 18 percent neither agreed nor disagreed and 22 percent strongly disagreed or disagreed.
In Q1 FY 20, 68 percent of active providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 16 percent strongly disagreed or disagreed.
In Q1 FY 21, 69 percent of active providers strongly agreed or agreed, 20 percent neither agreed nor disagreed and 11 percent strongly disagreed or disagreed.
In Q4 FY18, 54 percent of inactive providers strongly agreed or agreed, 24 percent neither agreed nor disagreed and 22 percent strongly disagreed or disagreed.
In Q2 FY 19, 72 percent of inactive providers strongly agreed or agreed, 13 percent neither agreed nor disagreed and 15 percent strongly disagreed or disagreed.
In Q1 FY 20, 69 percent of inactive providers strongly agreed or agreed, 17 percent neither agreed nor disagreed and 14 percent strongly disagreed or disagreed.
In Q1 FY 21, 76 percent of inactive providers strongly agreed or agreed, 14 percent neither agreed nor disagreed and 10 percent strongly disagreed or disagreed.
For all providers, in Q4 FY 18, 47 percent strongly agreed or agreed, 22 percent neither agreed nor disagreed and 31 percent strongly disagreed or disagreed.
For all providers, in Q2 FY 19, 63 percent strongly agreed or agreed, 17 percent neither agreed nor disagreed and 20 percent strongly disagreed or disagreed.
For all providers, in Q1 FY 20, 68 percent strongly agreed or agreed, 16 percent neither agreed nor disagreed and 16 percent strongly disagreed or disagreed.
For all providers, in Q1 FY 21, 69 percent strongly agreed or agreed, 20 percent neither agreed nor disagreed and 11 percent strongly disagreed or disagreed.

Section 2: Business conditions, Question 6.
Based on the survey results, the capacity of firms to source capital has been improving since the first survey in April 2018. Inactive providers tended to be more optimistic about sourcing capital compated to active providers. As active and inactive providers are likely to differ in a number of ways, including the industry distribution, average turnover, and capitalisation, it is difficult to attribute the difference in responses to a single factor. 
In Q4 FY 18, 25 percent of active providers strongly agreed or agreed, 26 percent neither agreed nor disagreed and 49 percent said they strongly disagreed/disagreed.
In Q2 FY 19, 36 percent of active providers strongly agreed or agreed, 25 percent neither agreed nor disagreed and 29 percent said they strongly disagreed/disagreed.
In Q1 FY 20, 42 percent of active providers strongly agreed or agreed, 27 percent neither agreed nor disagreed and 31 percent said they strongly disagreed/disagreed.
In Q1 FY 21, 48 percent of active providers strongly agreed or agreed, 28 percent neither agreed nor disagreed and 24 percent said they strongly disagreed/disagreed.
In Q4 FY 18, 32 percent of  inactive providers strongly agreed or agreed, 34 percent neither agreed nor disagreed and 34 percent said they strongly disagreed/disagreed.
In Q2 FY 19, 45 percent of  inactive providers strongly agreed or agreed, 26 percent neither agreed nor disagreed and 29 percent said they strongly disagreed/disagreed.
In Q1 FY 20, 51 percent of  inactive providers strongly agreed or agreed, 24 percent neither agreed nor disagreed and 25 percent said they strongly disagreed/disagreed.
In Q1 FY 21, 57 percent of  inactive providers strongly agreed or agreed, 24 percent neither agreed nor disagreed and 19 percent said they strongly disagreed/disagreed.
In Q4 FY 18, 27 percent of all providers strongly agreed or agreed, 29 percent neither agreed nor disagreed and 44 percent said they strongly disagreed/disagreed.
In Q2 FY 19, 38 percent of all providers strongly agreed or agreed, 26 percent neither agreed nor disagreed and 36 percent said they strongly disagreed/disagreed.
In Q1 FY 20, 44 percent of all providers strongly agreed or agreed, 26 percent neither agreed nor disagreed and 30 percent said they strongly disagreed/disagreed.
In Q1 FY 21, 48 percent of all providers strongly agreed or agreed, 28 percent neither agreed nor disagreed and 24 percent said they strongly disagreed/disagreed.


Section 2: Business conditions, Question 7.
I am optimistic the business will be successful in the long-term.
The question about long-term success of the business was introduced in the November 2018 survey. Since then the percentage of providers with a positive outlook has increased by 6 percentage points, from 79 percent to 85 percent.
In Q2 FY 19, for active providers, 79 percent said they strongly agreed or agreed, 12 percent said they neither agreed nor disagreed and 9 percent said they strongly disagreed or disagreed. 
In Q1 FY 20, for active providers, 84 percent said they strongly agreed or agreed, 11 percent said they neither agreed nor disagreed and 6 percent said they strongly disagreed or disagreed. 
In Q1 FY 21, for active providers, 85 percent said they strongly agreed or agreed, 10 percent said they neither agreed nor disagreed and 4 percent said they strongly disagreed or disagreed. 
In Q2 FY 19, for inactive providers, 80 percent said they strongly agreed or agreed, 12 percent said they neither agreed nor disagreed and 8 percent said they strongly disagreed or disagreed.
In Q1 FY 20, for inactive providers, 83 percent said they strongly agreed or agreed, 12 percent said they neither agreed nor disagreed and 5 percent said they strongly disagreed or disagreed.
In Q1 FY 21, for inactive providers, 87 percent said they strongly agreed or agreed, 9 percent said they neither agreed nor disagreed and 4 percent said they strongly disagreed or disagreed.
In Q2 FY 19, for all providers, 79 percent said they strongly agreed or agreed, 12 percent said they neither agreed nor disagreed and 9 percent said they strongly disagreed or disagreed. 
In Q1 FY 20, for all providers, 83 percent said they strongly agreed or agreed, 11 percent said they neither agreed nor disagreed and 6 percent said they strongly disagreed or disagreed. 
In Q1 FY 21, for all providers, 85 percent said they strongly agreed or agreed, 10 percent said they neither agreed nor disagreed and 4 percent said they strongly disagreed or disagreed. 


### Business conditions (COVID-19)

The latest survey included three additional questions asking about providers’ experiences during the COVID-19 pandemic:

1. Has your business experienced disruption due to the coronavirus?
2. Do you have plans to or have you made changes to your business model to adapt to market conditions created by the coronavirus?
3. On a scale of 1 to 10, with 1 being the least positive and 10 being the most positive, how would you rate the NDIA’s response throughout the COVID-19 situation?

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| Section 2: Business conditions, Question 8 Section 2: Business conditions, Question 8. This table displays three bar charts that capture the percentage figures from the second table further down in the same figure. The question is: Has your business expereinced disruption due to the coronavirus? Results are seperated by active providers, inactive providers and all providers.   | **Response category** | **Question** | **Active Providers** | **Inactive Providers** | **All Providers** | | --- | --- | --- | --- | --- | | **A** | Our business is trading as normal or higher. | 47.5% | 35.5% | 46.5% | | **B** | Our business is trading but at a reduced rate. | 49.5% | 50.2% | 49.5% | | **C** | We have chosen to temporarily close our business due to the coronavirus. We plan to reopen. | 1.2% | 6.9% | 1.7% | | **D** | We have chosen to permanently close our business due to the coronavirus. We do not plan to reopen. | 0.1% | 0.0% | 0.1% | | **E** | We have had to close our business due to coronavirus restrictions and not by choice. We plan to reopen. | 1.6% | 6.1% | 2.0% | | **F** | We have had to close our business due to coronavirus restrictions and not by choice. We do not plan to reopen. | 0.0% | 0.4% | 0.1% | | **G** | We have closed our business but unrelated to the coronavirus. | 0.1% | 0.8% | 0.2% |   Almost half (47.5%) of active providers have not been negatively affected by the pandemic. Inactive providers are somewhat more affected as only 35.5% reported no negative impact. For both active and inactive providers, around 50% say that their business, despite remaining afloat, has been trading at a reduced rate.  4.0% of active providers and 14.3% of inactive providers have closed their business, mostly as a result of COVID-19, either temporarily or permanently. The most commonly cited reasons for shutdown are: temporary shutdown due to COVID-19 (1.7% of all respondents) and permanent shutdown because of coronavirus restrictions (2.0 of all respondents). |

Section 2: Business conditions, Question 9.
Do you have plans to or have you made changes to your business model to adapt to market conditions created by the coronavirus?
Active providers are more likely to say they have planned or made changes to their business model to adapt to a market affected by COVID-19 (63.1 percent vs 55.1 percent). However, active providers are also slightly more likely to say that they have not made changes (25.6 percent vs 24.9 percent). 1 in 5 active providers were unsure, while only 1 in 9 active providers were unsure. 
For active providers, 63.1 percent responded yes, 11.3 percent said unsure and 25.6 percent said no.
For inactive providers, 55.1 percent responded yes, 20 percent said unsure and 24.9 percent said no.
For all providers, 62.4 percent responded yes, 12.1 percent said unsure and 25.5 percent said no.


Section 2: Business conditions, Question 10.
On a scale of 1 to 10, with 1 being the least positive and 10 being the most positive, how would you rate the NDIA's response throughout the COVID-19 situation?
Overall, active providers have rated the NDIA's response to the pandemic slightly more favourably than inactive providers (6.8 versus 6.6). 46.6 percent of active providers gave a score of 8 or above, compared to 42 percent of inactive providers. Conversely, 33.1 percent of inactive providers rated the NDIA's pandemic response 5 or lower, while only 29 percent of active providers did so.
For active providers, 2.7 percent rated the NDIA's response as 1 out of 10, 3.4 rated 2, 4.6 rated 3, 4.9 rated 4, 13.3 rated 5, 9.1 rated 6, 15.3 rated 7, 21.7 rated 8, 13.5 rated 9 and 11.4 rated 10. The average rating was 6.81.

For inactive providers, 6.9 percent rated the NDIA's response as 1 out of 10, 1.6 rated 2, 4.9 rated 3, 3.7 rated 4, 15.9 rated 5, 8.2 rated 6, 16.7 rated 7, 17.1 rated 8, 8.6 rated 9 and 16.3 rated 10. The average rating was 6.63.

For all providers, 3.1 percent rated the NDIA's response as 1 out of 10, 3.3 rated 2, 4.6 rated 3, 4.8 rated 4, 13.6 rated 5, 9 rated 6, 15.4 rated 7, 21.3 rated 8, 13.1 rated 9 and 11.9 rated 10. The average rating was 6.79.



### Market conditions

Section 3: Market conditions, Question 11.
I am optimistic about the health of the NDIS market. 
Since April 2018, the percentage of positive responses has increased by 18 percentage points overall. Notably, active providers reported a 10 percentage point increase (from 36% to 46%) between November 2018 and September 2019, and another 13 percentage point increase between September 2019 and September 2020. For inactive providers, the corresponding increases were 6 and 11 percentage points.

For active providers, in Q4 FY 18, 40 percent strongly agreed or agreed, 23 percent neither agreed nor disagreed and 37 percent strongly disageed or disagreed.
For active providers, in Q2 FY 19, 36 percent strongly agreed or agreed, 22 percent neither agreed nor disagreed and 42 percent strongly disageed or disagreed.
For active providers, in Q1 FY 20, 46 percent strongly agreed or agreed, 21 percent neither agreed nor disagreed and 32 percent strongly disageed or disagreed.
For active providers, in Q1 FY 21, 59 percent strongly agreed or agreed, 21 percent neither agreed nor disagreed and 20 percent strongly disageed or disagreed.

For inactive providers, in Q4 FY 18, 44 percent strongly agreed or agreed, 26 percent neither agreed nor disagreed and 30 percent strongly disageed or disagreed.
For inactive providers, in Q2 FY 19, 44 percent strongly agreed or agreed, 23 percent neither agreed nor disagreed and 32 percent strongly disageed or disagreed.
For inactive providers, in Q1 FY 20, 50 percent strongly agreed or agreed, 24 percent neither agreed nor disagreed and 26 percent strongly disageed or disagreed.
For inactive providers, in Q1 FY 21, 61 percent strongly agreed or agreed, 21 percent neither agreed nor disagreed and 18 percent strongly disageed or disagreed.
For all providers, in Q4 FY 18, 41 percent strongly agreed or agreed, 24 percent neither agreed nor disagreed and 35 percent strongly disageed or disagreed.
For all providers, in Q2 FY 19, 39 percent strongly agreed or agreed, 22 percent neither agreed nor disagreed and 39 percent strongly disageed or disagreed.
For all providers, in Q1 FY 20, 47 percent strongly agreed or agreed, 22 percent neither agreed nor disagreed and 31 percent strongly disageed or disagreed.
For all providers, in Q1 FY 21, 59 percent strongly agreed or agreed, 21 percent neither agreed nor disagreed and 20 percent strongly disageed or disagreed.



Section 3: Market conditions, Question 12.
In the next 12 months I expect competition to increase in the NDIS market.
Provider expectation in relation to competition in the NDIS market have remained at similar levels over time. 

For active providers, in Q4 FY 18, 66 percent said they strongly agreed or agreed, 20 percent said they neither agreed nor disagreed, and 14 percent said they strongly disagreed or disagreed.  For active providers, in Q2 FY 19, 63 percent said they strongly agreed or agreed, 19 percent said they neither agreed nor disagreed, and 18 percent said they strongly disagreed or disagreed. 
For active providers, in Q1 FY 20, 67 percent said they strongly agreed or agreed, 18 percent said they neither agreed nor disagreed, and 15 percent said they strongly disagreed or disagreed. 
For active providers, in Q1 FY 21, 68 percent said they strongly agreed or agreed, 22 percent said they neither agreed nor disagreed, and 10 percent said they strongly disagreed or disagreed. 

For inactive providers, in Q4 FY 18, 72 percent said they strongly agreed or agreed, 20 percent said they neither agreed nor disagreed, and 8 percent said they strongly disagreed or disagreed. 
For inactive providers, in Q2 FY 19, 68 percent said they strongly agreed or agreed, 21 percent said they neither agreed nor disagreed, and 12 percent said they strongly disagreed or disagreed. 
For inactive providers, in Q1 FY 20, 68 percent said they strongly agreed or agreed, 23 percent said they neither agreed nor disagreed, and 10 percent said they strongly disagreed or disagreed. 
For inactive providers, in Q1 FY 21, 69 percent said they strongly agreed or agreed, 22 percent said they neither agreed nor disagreed, and 9 percent said they strongly disagreed or disagreed. 

For all providers, in Q4 FY 18, 68 percent said they strongly agreed or agreed, 20 percent said they neither agreed nor disagreed, and 12 percent said they strongly disagreed or disagreed. 
For all providers, in Q2 FY 19, 64 percent said they strongly agreed or agreed, 20 percent said they neither agreed nor disagreed, and 16 percent said they strongly disagreed or disagreed. 
For all providers, in Q1 FY 20, 67 percent said they strongly agreed or agreed, 19 percent said they neither agreed nor disagreed, and 14 percent said they strongly disagreed or disagreed.
For all providers, in Q1 FY 21, 68 percent said they strongly agreed or agreed, 22 percent said they neither agreed nor disagreed, and 10 percent said they strongly disagreed or disagreed.



Section 3: Market conditions, Question 13.
There are opportunities in the NDIS marekt for business growth.
Compared to the first survey, both active and inactive providers are more likely see opportunities in the NDIS market for business growth. Only slight increases were observed for the latest survey (75% to 76% for active providers, and 75% to 79% for inactive providers).

In Q4 FY 18, 71 percent of active providers strongly agreed or agreed, 14 percent neither agreed nor disagreed and 15 percent said they strongly disagreed or disagreed
In Q2 FY 19, 67 percent of active providers strongly agreed or agreed, 17 percent neither agreed nor disagreed and 17 percent said they strongly disagreed or disagreed.
In Q1 FY 20, 75 percent of active providers strongly agreed or agreed, 15 percent neither agreed nor disagreed and 10 percent said they strongly disagreed or disagreed.
In Q1 FY 21, 76 percent of active providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 9 percent said they strongly disagreed or disagreed.
In Q4 FY 18, 71 percent of inactive providers strongly agreed or agreed, 17 percent neither agreed nor disagreed and 12 percent said they strongly disagreed or disagreed.
In Q2 FY 19, 69 percent of inactive providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 16 percent said they strongly disagreed or disagreed.
In Q1 FY 20, 75 percent of inactive providers strongly agreed or agreed, 15 percent neither agreed nor disagreed and 11 percent said they strongly disagreed or disagreed.
In Q1 FY 21, 79 percent of inactive providers strongly agreed or agreed, 15 percent neither agreed nor disagreed and 6 percent said they strongly disagreed or disagreed.
In Q4 FY 18, 71 percent of all providers strongly agreed or agreed, 15 percent neither agreed nor disagreed and 14 percent said they strongly disagreed or disagreed. 
In Q2 FY 19, 67 percent of all providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 17 percent said they strongly disagreed or disagreed. 
In Q1 FY 20, 75 percent of all providers strongly agreed or agreed, 15 percent neither agreed nor disagreed and 11 percent said they strongly disagreed or disagreed. 
In Q1 FY 21, 76 percent of all providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 9 percent said they strongly disagreed or disagreed. 



### The NDIA is reliable

Section 4: The NDIA is reliable, Question 14.
Providers see the information on the NDIS website as more reliable: the proportion who agree/ strongly agree has been increasing over time, from 39% in June 2018 to 48% in September 2019, followed by a very strong increase for the latest survey (14 percentage points for active providers and 21 percentage points for inactive providers).
In Q4 FY 18, 36 percent of active providers strongly agreed or agreed, 21 percent neither agreed nor disagreed and 42 percent strongly disagreed or disagreed.
In Q2 FY 19, 42 percent of active providers strongly agreed or agreed, 21 percent neither agreed nor disagreed and 37 percent strongly disagreed or disagreed.
In Q1 FY 20, 47 percent of active providers strongly agreed or agreed, 22 percent neither agreed nor disagreed and 30 percent strongly disagreed or disagreed.
In Q1 FY 21, 61 percent of active providers strongly agreed or agreed, 19 percent neither agreed nor disagreed and 20 percent strongly disagreed or disagreed.
In Q4 FY 18, 44 percent of inactive providers strongly agreed or agreed, 23 percent neither agreed nor disagreed and 33 percent strongly disagreed or disagreed.
In Q2 FY 19, 47 percent of inactive providers strongly agreed or agreed, 22 percent neither agreed nor disagreed and 31 percent strongly disagreed or disagreed.
In Q1 FY 20, 50 percent of inactive providers strongly agreed or agreed, 24 percent neither agreed nor disagreed and 26 percent strongly disagreed or disagreed.
In Q1 FY 21, 71 percent of inactive providers strongly agreed or agreed, 16 percent neither agreed nor disagreed and 13 percent strongly disagreed or disagreed.
In Q4 FY 18, 39 percent of all providers strongly agreed or agreed, 22 percent neither agreed nor disagreed and 39 percent strongly disagreed or disagreed.
In Q2 FY 19, 43 percent of all providers strongly agreed or agreed, 22 percent neither agreed nor disagreed and 35 percent strongly disagreed or disagreed.
In Q1 FY 20, 48 percent of all providers strongly agreed or agreed, 23 percent neither agreed nor disagreed and 29 percent strongly disagreed or disagreed.
In Q1 FY 21, 62 percent of all providers strongly agreed or agreed, 18 percent neither agreed nor disagreed and 19 percent strongly disagreed or disagreed.



Section 4: The NDIA is reliable, Question 15.
I will get a timely response to my question and issues.
Provider satisfaction with timeliness of responses has improved in the last three surveys. Inactive providers appear to be more positive; still less than half of both groups strongly agree or agree.
In Q4 FY 18, 17 percent of active providers strongly agreed or agreed, 12 percent neither agreed nor diagreed and 72 percent strongly disagreed or disagreed. 
In Q2 FY 19, 23 percent of active providers strongly agreed or agreed, 15 percent neither agreed nor diagreed and 61 percent strongly disagreed or disagreed.
In Q1 FY 20, 26 percent of active providers strongly agreed or agreed, 17 percent neither agreed nor diagreed and 56 percent strongly disagreed or disagreed.
In Q1 FY 21, 34 percent of active providers strongly agreed or agreed, 21 percent neither agreed nor diagreed and 46 percent strongly disagreed or disagreed.
In Q4 FY 18, 28 percent of inactive providers strongly agreed or agreed, 25 percent neither agreed nor diagreed and 48 percent strongly disagreed or disagreed. 
In Q2 FY 19, 35 percent of inactive providers strongly agreed or agreed, 23 percent neither agreed nor diagreed and 42 percent strongly disagreed or disagreed. 
In Q1 FY 20, 38 percent of inactive providers strongly agreed or agreed, 23 percent neither agreed nor diagreed and 39 percent strongly disagreed or disagreed. 
In Q1 FY 21, 49 percent of inactive providers strongly agreed or agreed, 26 percent neither agreed nor diagreed and 25 percent strongly disagreed or disagreed. 
In Q4 FY 18, 20 percent of all providers strongly agreed or agreed, 16 percent neither agreed nor diagreed and 64 percent strongly disagreed or disagreed. 
In Q2 FY 19, 26 percent of all providers strongly agreed or agreed, 17 percent neither agreed nor diagreed and 56 percent strongly disagreed or disagreed. 
In Q1 FY 20, 29 percent of all providers strongly agreed or agreed, 19 percent neither agreed nor diagreed and 52 percent strongly disagreed or disagreed. 
In Q1 FY 21, 35 percent of all providers strongly agreed or agreed, 21 percent neither agreed nor diagreed and 44 percent strongly disagreed or disagreed. 



Section 4: The NDIA is reliable, Question 16.
My claims are processed in a timely manner.
Just under three quarters (74%) of active providers consider their claims to be processed in a timely manner. This is a notable improvement from the 3 previous surveys where 65%-69% thought so.
In Q4 FY 18, 65 percent of active providers strongly agreed or agreed, 9 percent neither agreed nor disagreed and 27 percent strongly disagreed or disagreed. 
In Q2 FY 19, 69 percent of active providers strongly agreed or agreed, 9 percent neither agreed nor disagreed and 22 percent strongly disagreed or disagreed. 
In Q1 FY 20, 67 percent of active providers strongly agreed or agreed, 10 percent neither agreed nor disagreed and 22 percent strongly disagreed or disagreed. 
In Q1 FY 21, 74 percent of active providers strongly agreed or agreed, 12 percent neither agreed nor disagreed and 14 percent strongly disagreed or disagreed. 
 


Section 5: Overall rating, Question 17.
On a scale of 1 to 10, with 1 being the least positive and 10 being the most positive, how would you rate your overall expereince of interacting with the NDIA?
The overall satisfaction rating has been increasing over time, from 4.7 in June 2018 to 6.2 in September 2020, with a 0.9 increase between September 2019 and September 2020. The average rating for active providers increased by 0.8 between September 2019 and September 2020, and the average rating for inactive providers increased by 1.2 in the same period.

In Q4 FY 18, for active providers, 4.7 was the average satisfaction score. 
In Q2 FY 19, 5.1 was the average satisfaction.
In Q1 FY 20, 5.4 was the average satisfaction.
In Q1 FY 21, 6.2 was the average satisfaction.  

In Q4 FY 18, for inactive providers, 4.8 was the average satisfaction score. 
In Q2 FY 19, 4.7 was the average satisfaction.
In Q1 FY 20, 5.0 was the average satisfaction.
In Q1 FY 21, 6.2 was the average satisfaction.

In Q4 FY 18, for all providers, 4.7 was the average satisfaction score. 
In Q2 FY 19, 5.0 was the average satisfaction.
In Q1 FY 20, 5.3 was the average satisfaction.
In Q1 FY 21, 6.2 was the average satisfaction.



## Survey responses – qualitative

Active providers were also invited to respond to the question: Do you have any other comments about your interactions with the NDIS or the NDIA? A total of 1412 responses were received.

Inactive providers were also asked to provide additional information. 44 responses were received to this question.

### Continued opportunities to improve interactions

Similar to last year, provider communications with the NDIA remains a concern. 26% of responses were negative in relation to communications. Many providers mentioned a lack of clear and consistent information.

Analysis showed that other areas have moved in the right direction as there were proportionally fewer concerns about wait times, being on hold, and not getting any response at all. While there is still room for improvement, analysis showed concerns about provider speed of payment and not being paid have decreased from the previous survey.

A few generalised comments also noted improvements from previous experiences in interactions with the NDIA, including with the contact centre.

### COVID-19 was a common topic

Not surprisingly, many providers mentioned the COVID-19 pandemic in their responses. The most common theme that emerged across all responses was changes providers have made to their service delivery methods, in order to adapt.

A large proportion of providers noted they now deliver services through telehealth or have increased this service. Other providers noted they had diversified the products and services they offered and adapted their programs to offer more choice and flexibility to clients, or respond to changes in demand and supply.

The next most common set of changes providers reported was having to make their businesses COVID-safe, including the implementation of safety plans, increased hygiene protocols and staff training. Impacts on staffing were also reported.

Only a few providers mentioned temporary closures of business or partial closures of some sites.

## Conclusion

Survey participation rates remain strong, indicating providers continue to be willing to share their time and feedback. The results from this year’s survey demonstrate providers are feeling more confident and optimistic about the market and their future in it, despite the impact of the COVID-19 pandemic.

Both market confidence and optimism have risen considerably over the time the survey has been administered, with the biggest increase in sentiment ever seen this year.

Business conditions have remained steady or seen a slight improvement across the four surveys.

Provider confidence in the long-term health of the NDIS market saw the biggest jump since the surveys began in 2018, an increase of 12 percentage points over last year.

Through the survey, the NDIA continues to see areas of improvement and also identify areas of focus, as responses highlight the need for the NDIA to focus on its interactions and support its staff.