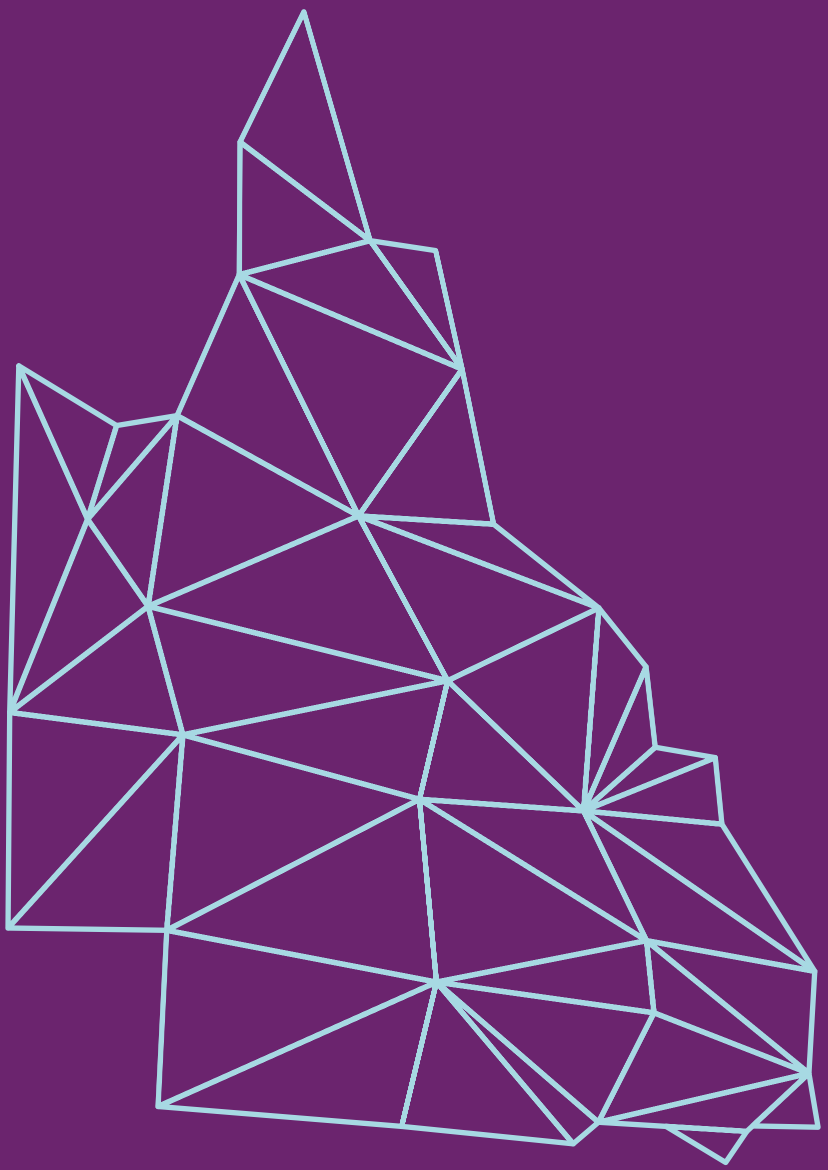
The NDIS market
Queensland

31 December 2019



National Disability Insurance Agency

Background

The purpose of the National Disability Insurance Scheme (NDIS) is to provide reasonable and necessary funding to people with a permanent and significant disability so that they may access the supports and services they need to achieve their goals. Participants receive individual budgets from which they choose the providers to support them.

On 30 September 2019, the NDIA released a report on the NDIS market (using 30 June 2019 data – "the June report"). The aim of this report was to support the purpose of the NDIS by comparing a number of market indicators across geographical regions and participant characteristics to identify "hot spots" where support provision is comparatively lower or higher than the rest of the NDIS market. Accompanying that report were specific State / Territory presentations which provided further insight into the market within those jurisdictions.

This presentation provides an update to this previous Queensland presentation using data at 31 December 2019. The presentation covers the key market metrics that the NDIA monitors across the 13 bilateral regions within Queensland.

Summary of market monitoring key indicators

A deep dive into the NDIS market has been undertaken to better understand market "hot spots". The three key indicators included in this report are plan utilisation, provider concentration, and choice and control (see table on the right).

Indicators are presented both including and excluding participants in supported independent living (SIL).

In the detailed dashboards, the key indicators are presented by:

- Geographical region
- Support category
- Participant characteristics, including age, primary disability type, level of function, remoteness, Indigenous status and culturally and linguistically diverse (CALD) status.

An appropriate benchmark is also presented for each indicator and market segment. The benchmark represents the national average, and for some indicators, is adjusted for the mix of participants within the market being analysed (for example, the proportion of SIL participants and the amount of time a participant has been n the Scheme).

Key indicators[1]

Indicator	Definition
Plan utilisation	Payments as a proportion of total plan budgets (or supports committed) for the period
Provider concentration	Proportion of total provider payments that were paid to the ten providers that received the most payments
Choice and control	Proportion of participants who report that they choose who supports them and that the NDIA helps with choice and control

[1] Indicators have been calculated over the period from 1 April 2019 to 30 September 2019, using data available as at 31 December 2019. Please note that in-kind data has been included in the plan utilisation metrics, but excluded from the provider concentration metric.

Summary of market indicators
by region – QLD

Bilateral region	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
Queensland							
Beenleigh	1 Jul 18	5,091	194.91	38,286	126.39	24,827	65%
Brisbane	1 Jul 18	10,327	436.07	42,226	288.05	27,893	66%
Bundaberg	1 Oct 17	1,937	62.36	32,193	45.94	23,715	74%
Caboolture/Strathpine	1 Jan 19	4,826	172.21	35,683	98.53	20,417	57%
Cairns	1 Jul 18	2,597	103.16	39,721	68.11	26,228	66%
Ipswich	1 Jul 17	5,062	160.62	31,731	108.42	21,419	68%
Mackay	1 Nov 16	2,164	62.27	28,777	42.16	19,483	68%
Maroochydore	1 Jan 19	4,002	148.45	37,094	89.33	22,322	60%
Maryborough	1 Jul 18	2,150	94.27	43,845	60.36	28,073	64%
Robina	1 Jul 18	4,913	166.04	33,795	116.64	23,741	70%
Rockhampton	1 Jan 18	3,165	99.45	31,421	65.33	20,642	66%
Toowoomba	1 Jan 17	4,446	159.81	35,945	106.87	24,038	67%
Townsville	1 Apr 16	4,330	136.66	31,562	94.67	21,864	69%
Queensland average		**4,232**	**153.56**	**35,560**	**100.83**	**23,436**	**66%**
Queensland total		**55,010**	**1,996.27**	**36,289**	**1,310.82**	**23,829**	**66%**
National average		**3,896**	**122.89**	**32,031**	**84.56**	**20,564**	**64%**
National total		**311,777**	**9,835.00**	**31,545**	**6,767.14**	**21,705**	**69%**

At 31 December 2019, total plan budgets in Queensland over the 6 months from 1 April 2019 to 30 September 2019 amounted to $1,996m. Total payments over the same period amounted to $1,311, giving a utilisation rate of 66%. In the 30 June 2019 presentation, the equivalent rate for Queensland was 60%, indicating an overall increase in utilisation.

Note: Experience in other Schemes with individual budgets (internationally and in Australia) indicates that plan utilisation is unlikely to be 100% - however, should be higher than current levels. Some of the reasons for plans being under-utilised include more support was provided informally through family, friends and community; supports being put in plans "just in case" they are required; participants needing more support to implement their plans; providers needing more support to claim for supports provided; and supports being unavailable in the market.

Summary of market indicators
by region – QLD cont.

Bilateral region	Phase in date	Active participants with approved plans	Registered active providers	Participants per provider	Provider concentration	Outcomes indicator on choice and control	Has NDIS helped with choice and control?
Queensland							
Beenleigh	1 Jul 18	5,091	799	6.4	41%	47%	79%
Brisbane	1 Jul 18	10,327	1,116	9.3	36%	47%	75%
Bundaberg	1 Oct 17	1,937	269	7.2	79%	50%	78%
Caboolture/Strathpine	1 Jan 19	4,826	620	7.8	37%	47%	66%
Cairns	1 Jul 18	2,597	301	8.6	66%	50%	69%
Ipswich	1 Jul 17	5,062	812	6.2	35%	53%	74%
Mackay	1 Nov 16	2,164	278	7.8	56%	56%	73%
Maroochydore	1 Jan 19	4,002	537	7.5	45%	48%	74%
Maryborough	1 Jul 18	2,150	353	6.1	74%	47%	79%
Robina	1 Jul 18	4,913	676	7.3	47%	46%	73%
Rockhampton	1 Jan 18	3,165	378	8.4	66%	52%	72%
Toowoomba	1 Jan 17	4,446	568	7.8	41%	55%	77%
Townsville	1 Apr 16	4,330	453	9.6	45%	54%	71%
Queensland average		**4,232**	**551**	**7.7**	**51%**	**50%**	**74%**
Queensland total		**55,010**	**3,065**	**17.9**	**26%**	**49%**	**74%**
National average		**3,896**	**443**	**8.3**	**61%**	**51%**	**66%**
National total		**311,777**	**10,817**	**28.8**	**16%**	**50%**	**68%**

State-wide, 49% of respondent participants said that they chose who supported them and 74% said that the NDIA helped with choice and control. The comparative figures from the 30 June 2019 presentation were 49% and 71% respectively, indicating a minor improvement for the 'Has the NDIS helped with choice and control' outcomes indicator.

Key indicators – QLD

Key indicators can be used to understand how further investment might improve regional markets. Here we look at the different indicators and provide some commentary by geographical region.

Utilisation:

The highest level of utilisation was seen in Bundaberg (74%) and the lowest in Caboolture/Strathpine (57%). In the 30 June 2019 presentation, Bundaberg had the highest level of utilisation (68%) and Beenleigh (50%) the lowest. Utilisation is now significantly higher for both regions (Beenleigh now has utilisation of 65%). Low levels of utilisation in Caboolture/Strathpine may reflect the relatively small amount of time since the region phased into the NDIS (Jan 2019). Caboolture/Strathpine wasn't included in the 30 June 2019 report because of it's recent phase-in.

Provider concentration:

Bundaberg had the highest level of provider concentration at 79%, while Ipswich (35%) and Brisbane (36%) had the lowest. Generally, the lower the concentration, the more competitive the market is likely to be – as payments are going to a range of different providers. As Brisbane has the most participants and plan budgets out of all the QLD regions, a low provider concentration can be expected. High market concentration in Bundaberg, indicates that there could be insufficient provider capacity.

In the 30 June 2019 presentation, Bundaberg (78%) and Brisbane (34%) had the highest and lowest levels of provider concentration, respectively, while provider concentration has decreased in Ipswich (41% to 35%) such that it is now slightly lower than Brisbane's.

Key indicators can be used to understand how further investment might improve regional markets. Here we look at the different indicators and provide some commentary by geographical region.

Outcomes indicator on choice and control:

In Mackay, 56% of participants responded that they chose who supports them, however in Robina, only 46% of participants responded that they had that choice. This compares to a national average of 50%. Participants in regions with a lower level on the outcomes indicator may thus benefit from increased choice (or information on their ability to choose).

Since the end of June 2019, the percentage of participants responding that they chose who supports has increase slightly in both Mackay (55% to 56%) and Robina (43% to 46%). The national average has also increased from 49% at the end of June.

Has NDIS helped with choice and control?:

79% of participants in Beenleigh and Maryborough responded that the NDIS had helped with choice and control over support provision, compared with 66% in Caboolture/Strathpine (the lowest in the State). The national average is 66%, indicating that overall Queensland regions are above average in this metric.

At the end of June 2019, 61% of participants in Beenleigh and 68% of participants in Maryborough responded that the NDIS had helped with choice and control over support provision – indicating an improvement in this metric. Of particular note is the fact that at the end of June 2019, Beenleigh was the lowest in the state on this metric, and is now the highest in the state at 31 December 2019. Caboolture/Strathpine wasn't included in the 30 June 2019 report because at the time it had only recently been phased-in. The national average has not changed since the end of June.

Summary of market indicators
by support category – QLD

Support category	Active participants with approved plans	Registered active providers	Provider concentration	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation	Outcomes indicator on choice and control	Has NDIS helped with choice and control?
Core										
Consumables	46,731	634	38%	59.70	1,278	24.47	524	41%	50%	75%
Daily Activities	39,976	1,025	34%	1,000.63	25,031	729.63	18,252	73%	48%	75%
Community	40,114	665	26%	428.46	10,681	264.98	6,606	62%	48%	75%
Transport	26,122	312	36%	41.00	1,570	37.43	1,433	91%	44%	77%
Core total	**50,218**	**1,461**	**29%**	**1,529.80**	**30,463**	**1,056.51**	**21,039**	**69%**	**49%**	**75%**
Capacity Building										
Choice and Control	20,277	307	41%	13.12	647	12.04	594	92%	50%	75%
Daily Activities	53,975	1,704	28%	250.83	4,647	122.34	2,267	49%	50%	75%
Employment	3,128	124	85%	19.97	6,385	13.39	4,282	67%	38%	76%
Health and Wellbeing	6,077	350	32%	8.87	1,459	3.58	589	40%	51%	80%
Home Living	385	39	70%	0.36	924	0.09	245	27%	54%	68%
Lifelong Learning	17	4	100%	0.03	1,893	0.01	513	27%	50%	67%
Relationships	2,477	248	49%	14.68	5,927	6.44	2,602	44%	14%	71%
Social and Civic	6,565	332	30%	15.69	2,389	5.09	775	32%	42%	75%
Support Coordination	20,279	494	30%	46.35	2,286	28.53	1,407	62%	40%	73%
Capacity Building total	**54,708**	**2,038**	**26%**	**369.90**	**6,761**	**191.52**	**3,501**	**52%**	**49%**	**75%**
Capital										
Assistive Technology	16,735	578	48%	78.90	4,715	52.96	3,165	67%	61%	76%
Home Modifications	4,512	166	50%	17.45	3,868	8.58	1,901	49%	48%	79%
Capital total	**18,081**	**659**	**41%**	**96.35**	**5,329**	**61.54**	**3,403**	**64%**	**57%**	**77%**
Missing	38	0	0%	0.22	5,867	1.24	32,683	557%	81%	18%
All support categories	**55,010**	**3,065**	**26%**	**1,996.27**	**36,289**	**1,310.82**	**23,829**	**66%**	**49%**	**74%**

This slide shows the breakdown of the market indicators by support category in Queensland.

- Daily Activities (Core and Capacity Building) and Community supports are the supports with the highest level of committed supports and payments. Provider concentration is low for these supports indicating a competitive market amongst providers exists.
- The position at the end of June 2019 was similar to the end of December 2019 position.

Summary of market indicators
by support category – QLD: **SIL / SDA only**

Support category	Active participants with approved plans	Registered active providers	Provider concentration	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation	Outcomes indicator on choice and control	Has NDIS helped with choice and control?
Core										
Consumables	3,877	264	63%	8.31	2,143	2.71	699	33%	16%	78%
Daily Activities	4,062	393	49%	450.63	110,938	433.21	106,650	96%	16%	78%
Community	4,023	362	40%	94.03	23,373	61.07	15,181	65%	16%	78%
Transport	3,925	191	48%	5.28	1,344	2.94	750	56%	16%	78%
Core total	**4,080**	**628**	**47%**	**558.24**	**136,825**	**499.94**	**122,534**	**90%**	**16%**	**78%**
Capacity Building										
Choice and Control	962	132	44%	0.67	693	0.61	639	92%	18%	82%
Daily Activities	4,018	662	25%	18.74	4,664	7.59	1,890	41%	16%	78%
Employment	430	25	97%	2.86	6,653	2.24	5,201	78%	18%	86%
Health and Wellbeing	949	148	30%	1.12	1,179	0.33	350	30%	14%	78%
Home Living	11	3	100%	0.01	1,178	0.00	419	36%	45%	50%
Lifelong Learning	1	0	0%	0.00	426	0.00	0	0%	0%	0%
Relationships	1,151	115	58%	7.75	6,737	3.76	3,265	48%	10%	73%
Social and Civic	293	53	70%	0.95	3,237	0.34	1,171	36%	16%	69%
Support Coordination	4,033	289	40%	11.02	2,732	7.21	1,787	65%	16%	78%
Capacity Building total	**4,083**	**856**	**32%**	**43.12**	**10,561**	**22.09**	**5,410**	**51%**	**16%**	**78%**
Capital										
Assistive Technology	1,639	167	72%	7.82	4,774	3.93	2,397	50%	16%	77%
Home Modifications	1,524	28	87%	8.91	5,846	3.12	2,050	35%	15%	78%
Capital total	**2,539**	**192**	**63%**	**16.73**	**6,591**	**7.05**	**2,778**	**42%**	**15%**	**79%**
Missing	0	0	0%	0.06	0	0.09	0	158%	0%	0%
All support categories	**4,085**	**1,258**	**45%**	**618.15**	**151,323**	**529.17**	**129,539**	**86%**	**16%**	**78%**

This slide shows the breakdown of the market indicators by support category in Queensland, for participants with Supported Independent Living (SIL) and / or Specialist Disability Accommodation (SDA) supports.

- Daily Activities (Core) supports have the highest level of committed supports and payments. Provider concentration is low for these supports indicating that at the State level a relatively competitive market amongst providers exists.
- Utilisation for these supports is materially higher than for the participant population in general.

Summary of market indicators
by support category – QLD: **non-SIL / SDA only**

Support category	Active participants with approved plans	Registered active providers	Provider concentration	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation	Outcomes indicator on choice and control	Has NDIS helped with choice and control?
Core										
Consumables	42,854	611	36%	51.40	1,199	21.76	508	42%	55%	75%
Daily Activities	35,914	989	31%	550.00	15,314	296.42	8,254	54%	53%	75%
Community	36,091	641	23%	334.43	9,266	203.91	5,650	61%	52%	75%
Transport	22,197	280	32%	35.73	1,610	34.49	1,554	97%	49%	77%
Core total	**46,138**	**1,409**	**24%**	**971.55**	**21,058**	**556.58**	**12,063**	**57%**	**54%**	**74%**
Capacity Building										
Choice and Control	19,315	306	41%	12.45	645	11.43	592	92%	53%	74%
Daily Activities	49,957	1,658	29%	232.09	4,646	114.75	2,297	49%	54%	74%
Employment	2,698	120	83%	17.11	6,343	11.16	4,136	65%	41%	75%
Health and Wellbeing	5,128	322	35%	7.75	1,511	3.25	633	42%	59%	80%
Home Living	374	38	70%	0.34	916	0.09	240	26%	54%	68%
Lifelong Learning	16	4	100%	0.03	1,984	0.01	545	27%	53%	80%
Relationships	1,326	205	44%	6.93	5,225	2.69	2,027	39%	21%	67%
Social and Civic	6,272	325	30%	14.74	2,350	4.75	757	32%	44%	76%
Support Coordination	16,246	471	29%	35.34	2,175	21.32	1,312	60%	47%	72%
Capacity Building total	**50,625**	**1,975**	**26%**	**326.78**	**6,455**	**169.44**	**3,347**	**52%**	**54%**	**74%**
Capital										
Assistive Technology	15,096	556	47%	71.08	4,708	49.03	3,248	69%	67%	76%
Home Modifications	2,988	146	50%	8.54	2,859	5.45	1,825	64%	68%	79%
Capital total	**15,542**	**622**	**42%**	**79.62**	**5,123**	**54.48**	**3,506**	**68%**	**67%**	**76%**
Missing	38	0	0%	0.17	4,408	1.15	30,378	689%	81%	18%
All support categories	**50,925**	**2,965**	**22%**	**1,378.12**	**27,062**	**781.65**	**15,349**	**57%**	**54%**	**74%**

This slide shows the breakdown of the market indicators by support category in Queensland, for participants without Supported Independent Living (SIL) and / or Specialist Disability Accommodation (SDA) supports.

- The position is similar to that shown on Slide 8 – the majority (93%) of participants in Queensland do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the Queensland participant population overall.

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