The NDIS market
Tasmania

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 Tasmania presentation using data at 31 December 2019. The presentation covers the key market metrics that the NDIA monitors across the four bilateral regions within Tasmania.

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 – TAS

Bilateral region	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
Tasmania*							
TAS North	1 Jul 13	1,942	71.10	36,611	49.69	25,588	70%
TAS North West	1 Jul 13	1,740	64.46	37,046	47.11	27,073	73%
TAS South East	1 Jul 13	1,374	48.07	34,988	33.58	24,438	70%
TAS South West	1 Jul 13	1,924	81.89	42,562	59.76	31,061	73%
Tasmania average		**1,745**	**66.38**	**37,802**	**47.53**	**27,040**	**71%**
Tasmania total		**6,980**	**265.52**	**38,040**	**190.14**	**27,240**	**72%**
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 Tasmania over the 6 months from April 2019 to September 2019 amounted to $266m. Total payments over the same period amounted to $190m, giving a utilisation rate of 72%. The utilisation rate for Tasmania is unchanged from the 30 June 2019 presentation at 72%.

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 – TAS 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?
Tasmania*							
TAS North	1 Jul 13	1,942	240	8.1	65%	52%	59%
TAS North West	1 Jul 13	1,740	225	7.7	79%	53%	76%
TAS South East	1 Jul 13	1,374	228	6.0	69%	41%	56%
TAS South West	1 Jul 13	1,924	254	7.6	69%	56%	66%
Tasmania average		**1,745**	**237**	**7.4**	**71%**	**50%**	**64%**
Tasmania total		**6,980**	**540**	**12.9**	**52%**	**51%**	**65%**
National average		**3,896**	**443**	**8.3**	**61%**	**51%**	**66%**
National total		**311,777**	**10,817**	**28.8**	**16%**	**50%**	**68%**

State-wide, 51% of respondent participants said that they chose who supported them and 65% said that the NDIA helped with choice and control. Both outcomes improved since the 30 June 2019 presentation, from 48% and 61% respectively.

Key indicators – TAS

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:

Utilisation in TAS North West and TAS South West was 73% over the period and 70% in TAS North and TAS South East. In the 30 June 2019 presentation, the highest level of utilisation was seen in TAS North (74%) and the lowest in TAS South East (66%). Overall utilisation in Tasmania continues to be higher than the national average (69%), but while utilisation increased in TAS South East, it fell in TAS North and TAS North West.

Provider concentration:

Provider concentration across Tasmania (71%) is higher than the national average across regions of 61%, but has decreased 4% from 75% since the 30 June 2019 presentation, while the national average remained at 61%. The highest concentration is in TAS North West (79%) and the lowest in TAS North (65%). Across all four regions, provider concentration has decreased compared to the 30 June 2019 presentation, with the largest drop observed for TAS South West (from 76% to 69%).

Key indicators – TAS cont.

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 TAS North West, 53% of participants responded that they chose who supports them, however in TAS South East, only 41% of participants responded that they had that choice. This compares to a national average of 50% (49% in the 30 June 2019 presentation). Participants in regions with a lower level on the outcomes indicator may thus benefit from increased choice (or information on their ability to choose).

The proportion of participants responding that they chose who supported them increased for all regions since 30 June 2019, particularly so for TAS South East (from 35% to 41%).

Has NDIS helped with choice and control?:

76% of participants in TAS North West responded that the NDIS had helped with choice and control over support provision, compared with 56% in TAS South East (the lowest in the State). The national average is 66%, indicating that participants in TAS South East may benefit from greater assistance from the NDIS in choosing their supports and services.

Similarly to the observed trend for the indicator on choice and control, the proportion of participants who say the NDIS helped with choice and control has increased for all regions since 30 June 2019, the largest increase being for TAS South East (from 49% to 56%). The national average has not changed since the end of June 2019.

Summary of market indicators
by support category – TAS

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	5,459	127	80%	5.08	930	2.24	410	44%	50%	68%
Daily Activities	5,285	144	63%	143.33	27,120	118.84	22,487	83%	49%	68%
Community	5,211	129	52%	59.86	11,487	36.80	7,062	61%	49%	68%
Transport	3,426	53	72%	5.13	1,498	4.43	1,292	86%	47%	70%
Core total	**6,262**	**273**	**58%**	**213.40**	**34,079**	**162.31**	**25,919**	**76%**	**50%**	**66%**
Capacity Building										
Choice and Control	932	34	92%	0.52	558	0.39	423	76%	58%	56%
Daily Activities	6,240	288	43%	24.89	3,989	11.19	1,793	45%	49%	66%
Employment	638	27	86%	4.22	6,622	2.96	4,633	70%	59%	74%
Health and Wellbeing	326	33	79%	0.46	1,404	0.20	608	43%	59%	61%
Home Living	27	3	100%	0.04	1,525	0.00	164	11%	58%	50%
Lifelong Learning	4	0	0%	0.00	961	0.00	0	0%	50%	100%
Relationships	713	47	81%	2.89	4,054	1.00	1,405	35%	21%	64%
Social and Civic	1,182	71	64%	4.65	3,938	2.01	1,701	43%	52%	60%
Support Coordination	2,913	91	51%	6.23	2,138	4.18	1,436	67%	42%	68%
Capacity Building total	**6,671**	**352**	**30%**	**43.91**	**6,582**	**21.94**	**3,288**	**50%**	**50%**	**66%**
Capital										
Assistive Technology	1,299	95	83%	5.57	4,291	3.81	2,936	68%	57%	71%
Home Modifications	648	20	89%	2.59	3,996	1.62	2,504	63%	28%	72%
Capital total	**1,655**	**111**	**75%**	**8.16**	**4,933**	**5.44**	**3,285**	**67%**	**47%**	**71%**
Missing	19	0	0%	0.05	2,418	0.46	24,166	999%	78%	43%
All support categories	**6,980**	**540**	**52%**	**265.52**	**38,040**	**190.14**	**27,240**	**72%**	**51%**	**65%**

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

- Daily Activities (Core and Capacity Building) and Community supports are the supports with the highest level of committed supports and payments. Provider concentration is moderate for these supports.
- The largest growth in providers is seen for 'Assistive Technology', and 'Consumables', which may areas of increasing demand.
- The position at the end of December 2019 is generally more positive than at the end of June 2019, with improvements in both outcomes indicators across all support categories and lower provider concentration. Utilisation increased for capacity building and capital supports, but for core supports it fell from 78% to 76%, resulting in no overall movement.

Summary of market indicators
by support category – TAS: **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	740	45	96%	1.16	1,561	0.53	720	46%	18%	75%
Daily Activities	792	60	71%	89.75	113,323	84.15	106,250	94%	19%	75%
Community	790	64	64%	24.80	31,387	18.28	23,138	74%	18%	75%
Transport	777	32	84%	1.17	1,503	0.79	1,011	67%	18%	75%
Core total	**795**	**114**	**67%**	**116.87**	**147,007**	**103.75**	**130,499**	**89%**	**19%**	**75%**
Capacity Building										
Choice and Control	56	10	100%	0.03	610	0.02	440	72%	22%	56%
Daily Activities	761	126	46%	3.27	4,298	1.24	1,631	38%	17%	74%
Employment	85	15	96%	0.65	7,615	0.44	5,171	68%	25%	86%
Health and Wellbeing	51	13	96%	0.08	1,518	0.03	531	35%	22%	67%
Home Living	3	1	100%	0.01	4,558	0.00	304	7%	50%	100%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	272	21	95%	1.31	4,799	0.43	1,583	33%	15%	71%
Social and Civic	77	23	89%	0.58	7,474	0.37	4,794	64%	33%	82%
Support Coordination	781	56	62%	1.98	2,537	1.29	1,650	65%	18%	75%
Capacity Building total	**790**	**181**	**37%**	**7.91**	**10,007**	**3.82**	**4,838**	**48%**	**18%**	**75%**
Capital										
Assistive Technology	221	28	95%	0.89	4,033	0.56	2,525	63%	14%	73%
Home Modifications	441	8	100%	1.98	4,492	1.31	2,969	66%	14%	75%
Capital total	**510**	**36**	**83%**	**2.87**	**5,632**	**1.87**	**3,661**	**65%**	**15%**	**75%**
Missing	0	0	0%	0.00	0	0.01	0	333%	0%	0%
All support categories	**795**	**249**	**65%**	**127.65**	**160,568**	**109.44**	**137,666**	**86%**	**19%**	**75%**

This slide shows the breakdown of the market indicators by support category in Tasmania, 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 relatively high for these supports.
- Utilisation for these supports is materially higher than for the participant population in general.

Summary of market indicators
by support category – TAS: **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	4,719	115	76%	3.92	831	1.70	361	43%	58%	64%
Daily Activities	4,493	137	56%	53.58	11,925	34.69	7,722	65%	57%	65%
Community	4,421	120	46%	35.06	7,931	18.52	4,189	53%	56%	66%
Transport	2,649	49	64%	3.97	1,497	3.64	1,375	92%	56%	68%
Core total	**5,467**	**254**	**48%**	**96.53**	**17,657**	**58.56**	**10,711**	**61%**	**58%**	**63%**
Capacity Building										
Choice and Control	876	33	92%	0.49	554	0.37	422	76%	60%	56%
Daily Activities	5,479	278	45%	21.62	3,946	9.95	1,815	46%	57%	63%
Employment	553	26	84%	3.58	6,469	2.52	4,550	70%	63%	71%
Health and Wellbeing	275	30	79%	0.38	1,383	0.17	623	45%	68%	59%
Home Living	24	2	100%	0.03	1,146	0.00	146	13%	59%	38%
Lifelong Learning	4	0	0%	0.00	961	0.00	0	0%	50%	100%
Relationships	441	42	77%	1.58	3,594	0.57	1,295	36%	29%	53%
Social and Civic	1,105	68	61%	4.08	3,692	1.64	1,486	40%	53%	58%
Support Coordination	2,132	89	50%	4.25	1,991	2.90	1,358	68%	53%	62%
Capacity Building total	**5,881**	**344**	**32%**	**36.00**	**6,122**	**18.11**	**3,080**	**50%**	**58%**	**63%**
Capital										
Assistive Technology	1,078	90	83%	4.68	4,344	3.26	3,020	70%	69%	69%
Home Modifications	207	12	100%	0.61	2,940	0.31	1,516	52%	68%	61%
Capital total	**1,145**	**98**	**79%**	**5.29**	**4,621**	**3.57**	**3,118**	**67%**	**68%**	**66%**
Missing	19	0	0%	0.04	2,275	0.45	23,690	1041%	78%	43%
All support categories	**6,185**	**513**	**40%**	**137.87**	**22,291**	**80.69**	**13,047**	**59%**	**58%**	**62%**

This slide shows the breakdown of the market indicators by support category in Tasmania, 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 (89%) of participants in Tasmania do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the Tasmanian participant population overall.

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