ndis

The NDIS market
Australian Capital Territory

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 Australian Capital Territory presentation using data at 31 December 2019. The presentation covers the key market metrics that the NDIA monitors across the Australian Capital Territory.

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 – ACT

Bilateral region	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
Australian Capital Territory							
ACT	1 Jul 14	6,966	202.75	29,106	150.50	21,605	74%
Australian Capital Territory average		**6,966**	**202.75**	**29,106**	**150.50**	**21,605**	**74%**
Australian Capital Territory total		**6,966**	**202.75**	**29,106**	**150.50**	**21,605**	**74%**
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 the Australian Capital Territory over the 6 months from 1 April 2019 to 30 September 2019 amounted to $203m. Total payments over the same period amounted to $151m, giving a utilisation rate of 74%. In the 30 June 2019 presentation, the equivalent rate for the Australian Capital Territory was 72% - a minor 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 – ACT 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?
Australian Capital Territory							
ACT	1 Jul 14	6,966	467	14.9	54%	65%	74%
Australian Capital Territory average		**6,966**	**467**	**14.9**	**54%**	**65%**	**74%**
Australian Capital Territory total		**6,966**	**467**	**14.9**	**54%**	**65%**	**74%**
National average		**3,896**	**443**	**8.3**	**61%**	**51%**	**66%**
National total		**311,777**	**10,817**	**28.8**	**16%**	**50%**	**68%**

65% 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 65% and 73% respectively, indicating a small improvement for the outcomes indicator on choice and control.

Key indicators – ACT

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 level of utilisation in the ACT is 74%, higher than the national average (69%). Typically, including insufficient provider capacity to provide supports to participants. Since the 30 June 2019 presentation, utilisation for the ACT has increased from 72% to 74%. The national average increased from 66% to 69% over the same time period.

Provider concentration:

Provider concentration was 54% in the ACT, which is lower than the national average (61%). 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 the ACT has been in the Scheme for a long time, a low provider concentration can be expected. Provider concentration is now slightly higher than in the 30 June 2019 presentation (52%), while the national average didn't change over the same time period.

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 the ACT, 65% of participants responded that they chose who supports them, higher than the national average (50%). A higher level on the outcomes indicator along with low provider concentration suggests that the market in the region is healthy and participants feel they have sufficient choice of provider and supports. Since the end of June 2019, the percentage of participants in the ACT who responded that they chose who supports them hasn't changed.

Has NDIS helped with choice and control?:

74% of participants in the ACT responded that the NDIS had helped with choice and control over support provision, higher than the national average (66%). This result is consistent with the other indicator's suggestion that the ACT is a mature market and that participants feel they have sufficient choice and control over their providers and supports. Since the end of June 2019, the percentage of participants in the ACT who responded that the NDIS has helped them with choice and control has increased from 73% to 74%, a minor improvement.

Summary of market indicators
by support category – ACT

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	3,439	86	82%	4.35	1,265	1.72	501	40%	70%	74%
Daily Activities	4,194	151	61%	108.47	25,862	87.72	20,916	81%	64%	77%
Community	4,021	112	68%	34.96	8,693	23.59	5,868	67%	62%	76%
Transport	2,979	25	88%	5.42	1,821	5.48	1,840	101%	60%	77%
Core total	**5,379**	**223**	**58%**	**153.20**	**28,481**	**118.52**	**22,034**	**77%**	**65%**	**74%**
Capacity Building										
Choice and Control	2,275	53	90%	1.57	690	1.44	635	92%	60%	76%
Daily Activities	6,528	223	61%	25.81	3,953	15.96	2,446	62%	66%	74%
Employment	436	18	98%	3.07	7,035	1.88	4,313	61%	40%	69%
Health and Wellbeing	888	49	72%	1.33	1,495	0.76	858	57%	70%	80%
Home Living	5	1	100%	0.00	944	0.00	12	1%	80%	50%
Lifelong Learning	1	0	0%	0.00	3,017	0.00	0	0%	0%	0%
Relationships	968	42	82%	2.81	2,903	1.10	1,134	39%	35%	81%
Social and Civic	1,731	55	75%	3.95	2,279	1.81	1,044	46%	57%	73%
Support Coordination	2,422	82	52%	4.73	1,954	3.38	1,394	71%	55%	77%
Capacity Building total	**6,843**	**297**	**55%**	**43.27**	**6,323**	**26.33**	**3,848**	**61%**	**65%**	**74%**
Capital										
Assistive Technology	1,472	99	66%	5.22	3,547	3.83	2,602	73%	79%	76%
Home Modifications	211	19	92%	1.06	5,037	0.67	3,182	63%	83%	78%
Capital total	**1,533**	**108**	**59%**	**6.28**	**4,099**	**4.50**	**2,936**	**72%**	**79%**	**76%**
Missing	2	0	0%	0.00	0	1.15	573,615	0%	0%	0%
All support categories	**6,966**	**467**	**54%**	**202.75**	**29,106**	**150.50**	**21,605**	**74%**	**65%**	**74%**

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

- Daily Activities (Core and Capacity Building) and Community supports are the supports with the highest level of committed supports and payments. Provider concentration is high for these supports indicating that there may be insufficient providers for a competitive market.
- A comparison of provider growth and shrinkage statistics indicates that – across most supports – providers are shrinking rather than growing. This may also have a negative impact on the competitiveness of the ACT market.
- The position at the end of June 2019 was similar to the end of December 2019 position, however there have been increases in the utilisation for daily activities supports (both core and capacity building).

Summary of market indicators
by support category – ACT: **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	287	29	90%	0.73	2,559	0.28	965	38%	10%	89%
Daily Activities	421	49	73%	52.31	124,247	49.85	118,418	95%	21%	88%
Community	407	63	71%	8.77	21,545	6.45	15,838	74%	22%	88%
Transport	417	16	96%	0.50	1,205	0.44	1,059	88%	21%	88%
Core total	**421**	**91**	**68%**	**62.31**	**148,014**	**57.02**	**135,437**	**92%**	**21%**	**88%**
Capacity Building										
Choice and Control	191	20	94%	0.14	735	0.13	661	90%	25%	88%
Daily Activities	385	76	60%	1.10	2,861	0.61	1,582	55%	22%	89%
Employment	74	8	100%	0.52	7,094	0.40	5,427	77%	33%	73%
Health and Wellbeing	97	19	90%	0.14	1,482	0.08	851	57%	11%	88%
Home Living	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	296	26	84%	0.76	2,584	0.27	900	35%	20%	87%
Social and Civic	92	22	82%	0.28	2,991	0.15	1,665	56%	30%	94%
Support Coordination	417	50	57%	0.89	2,136	0.74	1,764	83%	21%	88%
Capacity Building total	**421**	**126**	**57%**	**3.84**	**9,123**	**2.37**	**5,641**	**62%**	**21%**	**88%**
Capital										
Assistive Technology	186	32	89%	0.73	3,929	0.41	2,198	56%	15%	88%
Home Modifications	19	2	100%	0.15	8,087	0.06	3,358	42%	0%	0%
Capital total	**189**	**34**	**86%**	**0.88**	**4,679**	**0.47**	**2,500**	**53%**	**15%**	**88%**
Missing	0	0	0%	0.00	0	0.03	0	0%	0%	0%
All support categories	**421**	**181**	**66%**	**67.04**	**159,238**	**59.90**	**142,282**	**89%**	**21%**	**88%**

This slide shows the breakdown of the market indicators by support category in the Australian Capital Territory, 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 lower for these supports compared to other support categories, indicating that at there is a more competitive market amongst providers offering these supports.
- Utilisation for these supports is materially higher than for the participant population in general.

Summary of market indicators
by support category – ACT: **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	3,152	77	82%	3.62	1,147	1.45	459	40%	73%	74%
Daily Activities	3,773	137	78%	56.16	14,884	37.87	10,037	67%	66%	76%
Community	3,614	104	73%	26.19	7,246	17.15	4,745	65%	64%	75%
Transport	2,562	19	92%	4.92	1,921	5.04	1,967	102%	63%	76%
Core total	**4,958**	**208**	**71%**	**90.88**	**18,331**	**61.50**	**12,404**	**68%**	**67%**	**73%**
Capacity Building										
Choice and Control	2,084	53	91%	1.43	686	1.32	633	92%	62%	76%
Daily Activities	6,143	209	62%	24.71	4,022	15.36	2,500	62%	67%	73%
Employment	362	17	98%	2.54	7,024	1.48	4,085	58%	40%	69%
Health and Wellbeing	791	45	75%	1.18	1,496	0.68	859	57%	72%	80%
Home Living	5	1	100%	0.00	944	0.00	12	1%	80%	50%
Lifelong Learning	1	0	0%	0.00	3,017	0.00	0	0%	0%	0%
Relationships	672	33	89%	2.05	3,044	0.83	1,237	41%	40%	79%
Social and Civic	1,639	52	77%	3.67	2,239	1.65	1,009	45%	59%	72%
Support Coordination	2,005	78	53%	3.84	1,917	2.64	1,318	69%	58%	75%
Capacity Building total	**6,422**	**279**	**56%**	**39.43**	**6,139**	**23.96**	**3,731**	**61%**	**67%**	**73%**
Capital										
Assistive Technology	1,286	90	66%	4.49	3,492	3.42	2,660	76%	82%	75%
Home Modifications	192	17	95%	0.91	4,735	0.61	3,164	67%	84%	79%
Capital total	**1,344**	**97**	**60%**	**5.40**	**4,018**	**4.03**	**2,998**	**75%**	**82%**	**75%**
Missing	2	0	0%	0.00	0	1.11	556,541	0%	0%	0%
All support categories	**6,545**	**439**	**62%**	**135.71**	**20,735**	**90.60**	**13,843**	**67%**	**67%**	**73%**

This slide shows the breakdown of the market indicators by support category in the Northern Territory, 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 (88%) of participants in Northern Territory do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the Northern Territory participant population overall.

Note that 'Core – Transport' shows a utilisation above 100% due to the fungibility of core supports. This refers to the ability of participants to use their funding flexibly between different core support types.

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