ndis

The NDIS market

Queensland

30 June 2020

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.

This report provides the latest update to the Queensland market report, using data as at 30 June 2020 (the previous report used data as at 31 December 2019). The report covers the key market metrics that the NDIA monitors across the 13 service districts within Queensland.

Accompanying this report is the 30 June 2020 report on 'The NDIS Market' – which compares 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.

Note that the data in this report is taken over the period from the 1 October 2019 to the 31 March 2020. We allow a three month lag due to the delay between supports being provided and payments being made.

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 in 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 NDIS helps with choice and control

[1] Indicators have been calculated over the period from 1 October 2019 to 31 March 2020, using data available as at 30 June 2020. 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 service district – Queensland

Service district	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	6,499	243.83	37,518	170.02	26,161	70%
Brisbane	1 Jul 18	12,786	523.88	40,973	360.69	28,209	69%
Bundaberg	1 Oct 17	2,251	72.60	32,252	52.89	23,497	73%
Caboolture/Strathpine	1 Jan 19	6,272	247.02	39,385	161.08	25,682	65%
Cairns	1 Jul 18	3,231	129.90	40,204	87.90	27,206	68%
Ipswich	1 Jul 17	5,982	190.52	31,849	132.06	22,077	69%
Mackay	1 Nov 16	2,524	75.51	29,919	50.74	20,103	67%
Maroochydore	1 Jan 19	5,335	211.59	39,661	143.70	26,936	68%
Maryborough	1 Jul 18	2,778	111.79	40,241	75.84	27,299	68%
Robina	1 Jul 18	6,375	210.13	32,961	153.51	24,080	73%
Rockhampton	1 Jan 18	3,895	122.50	31,450	79.62	20,441	65%
Toowoomba	1 Jan 17	4,927	181.14	36,764	126.14	25,602	70%
Townsville	1 Apr 16	4,809	158.65	32,991	108.44	22,550	68%
Queensland total		**67,664**	**2,479.05**	**36,638**	**1,702.63**	**25,163**	**69%**
National total		**364,879**	**11,978.68**	**32,829**	**8,341.41**	**22,861**	**70%**

In the 30 June 2020 report, there were 67,664 active participants with approved plans registered in Queensland and 3,160 active providers. Total plan budgets in Queensland over the 6 months from 1 October 2019 to 31 March 2020 amounted to $2,479m. Total payments over the same period amounted to $1,703m, giving a utilisation rate of 69%. In the 31 December 2019 report, the equivalent rate for Queensland was 66%, indicating an overall increase in utilisation.

Summary of market indicators
by service district – Queensland cont.

Service districts	Phase in date	Active participants with approved plans	Registered active providers	Participants per provider	Provider concentration	Outcomes indicator on choice and control	Has the NDIS helped with choice and control?
Queensland							
Beenleigh	1 Jul 18	6,499	881	7.4	39%	48%	80%
Brisbane	1 Jul 18	12,786	1,227	10.4	35%	49%	76%
Bundaberg	1 Oct 17	2,251	274	8.2	77%	51%	79%
Caboolture/Strathpine	1 Jan 19	6,272	780	8.0	36%	48%	74%
Cairns	1 Jul 18	3,231	335	9.6	62%	52%	70%
Ipswich	1 Jul 17	5,982	853	7.0	33%	54%	74%
Mackay	1 Nov 16	2,524	257	9.8	56%	57%	75%
Maroochydore	1 Jan 19	5,335	604	8.8	43%	50%	82%
Maryborough	1 Jul 18	2,778	366	7.6	74%	49%	75%
Robina	1 Jul 18	6,375	713	8.9	43%	49%	76%
Rockhampton	1 Jan 18	3,895	359	10.8	65%	54%	76%
Toowoomba	1 Jan 17	4,927	591	8.3	39%	58%	79%
Townsville	1 Apr 16	4,809	462	10.4	46%	56%	75%
Queensland average		**5,205**	**592**	**8.9**	**50%**	**–**	**–**
Queensland total		**67,664**	**3,160**	**–**	**–**	**51%**	**76%**
National average		**4,559**	**465**	**9.2**	**60%**	**–**	**–**
National total		**364,879**	**10,740**	**–**	**–**	**51%**	**71%**

State-wide, 51% of respondent participants said that they chose who supported them and 76% said that the NDIS helped with choice and control. The comparative figures from the 31 December 2019 report were 49% and 74% respectively, indicating an improvement for the 'Has the NDIS helped with choice and control' outcomes indicator.

Key indicators – Queensland

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 service district

Utilisation:

The highest level of utilisation was seen in the Bundaberg and Robina districts (73%) and the lowest in the Caboolture/Strathpine and Rockhampton districts (65%). In the 31 December 2019 report, Bundaberg had a utilisation rate of 74% and Robina had a utilisation rate of 70%, Caboolture/Strathpine had a rate of 57% and Rockhampton 66%. This indicates notable improvements for Caboolture/Strathpine and Robina districts (and minor worsening for Bundaberg and Rockhampton).

Provider concentration:

Bundaberg had the highest level of provider concentration at 77%, while Ipswich had the lowest at 33%. Generally, the lower the concentration, the more competitive the market is likely to be – as payments are going to a range of different providers. High market concentration in Bundaberg indicates that there could be insufficient provider capacity.

The 31 December 2019 report also showed Bundaberg with the highest provider concentration in Queensland (79%) and Ipswich as one of the lowest with 35%. In both cases, concentration has fallen, indicating an improvement in market competitiveness.

Key indicators – Queensland cont.

Outcomes indicator on choice and control:

In Toowoomba, 58% of participants responded that they chose who supports them, however in Beenleigh and Caboolture/Strathpine, 48% of participants responded that they had that choice. This compares to a national total of 51%. Participants in districts with a lower level on the outcomes indicator may thus benefit from increased choice (or information on their ability to choose).

Since the 31 December 2019 report, the percentage of participants who responded that they chose who supports them has increased by around two percentage points in Queensland, compared to the national total which has increased by 1% from 50%.

Has the NDIS helped with choice and control?:

82% of participants in Maroochydore responded that the NDIS had helped with choice and control over support provision, compared with 70% in Cairns (the lowest in the State). The national total is 71%, indicating that overall Queensland districts are above average in this metric.

In the 31 December 2019 report, the participants who responded that the NDIS had helped with choice and control over support provision had increased by two percentage points in Queensland compared to the national total that had increased by three percentage points.

Summary of market indicators
by support category – Queensland

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 the NDIS helped with choice and control?
Core										
Consumables	61,768	693	36%	67.71	1,096	35.70	578	53%	51%	77%
Daily Activities	60,242	1,154	31%	1,231.29	20,439	926.36	15,377	75%	51%	77%
Community	60,272	706	27%	514.00	8,528	346.64	5,751	67%	51%	77%
Transport	57,825	356	33%	45.60	789	42.23	730	93%	51%	77%
Core total	**62,410**	**1,630**	**28%**	**1,858.60**	**29,780**	**1,350.92**	**21,646**	**73%**	**51%**	**77%**
Capacity Building										
Choice and Control	29,374	330	43%	18.99	647	18.23	621	96%	52%	77%
Daily Activities	66,798	1,749	30%	336.65	5,040	170.66	2,555	51%	51%	77%
Employment	3,476	139	82%	23.03	6,625	15.60	4,488	68%	37%	78%
Health and Wellbeing	6,295	331	36%	9.19	1,460	3.88	617	42%	52%	82%
Home Living	370	35	70%	0.38	1,019	0.05	134	13%	60%	71%
Lifelong Learning	9	1	100%	0.03	3,608	0.00	67	2%	78%	60%
Relationships	2,928	235	48%	17.58	6,004	7.56	2,580	43%	14%	71%
Social and Civic	7,118	325	38%	17.45	2,451	6.21	873	36%	43%	75%
Support Coordination	24,682	559	29%	57.78	2,341	39.54	1,602	68%	43%	75%
Capacity Building total	**67,386**	**2,074**	**27%**	**481.08**	**7,139**	**261.73**	**3,884**	**54%**	**51%**	**77%**
Capital										
Assistive Technology	20,356	622	44%	116.27	5,712	74.50	3,660	64%	62%	79%
Home Modifications	4,757	199	47%	23.06	4,848	15.43	3,244	67%	52%	80%
Capital total	**21,554**	**709**	**36%**	**139.33**	**6,464**	**89.94**	**4,173**	**65%**	**60%**	**79%**
All support categories	**67,664**	**3,160**	**26%**	**2,479.05**	**36,638**	**1,702.63**	**25,163**	**69%**	**51%**	**76%**

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 has not markedly changed since the 31 December 2019 or 30 June 2019 reports.

Note: The sum of individual support categories do not equal the totals exactly due to a very small amount of missing information.

Appendix: Summary of market indicators
by support category – Queensland – 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 the NDIS helped with choice and control?
Core										
Consumables	4,348	325	56%	8.93	2,055	3.80	873	42%	16%	79%
Daily Activities	4,384	491	46%	546.56	124,672	513.30	117,085	94%	16%	79%
Community	4,372	401	36%	115.10	26,327	81.51	18,644	71%	16%	79%
Transport	4,352	224	47%	5.74	1,319	3.72	855	65%	16%	79%
Core total	**4,384**	**771**	**44%**	**676.34**	**154,274**	**602.33**	**137,393**	**89%**	**16%**	**79%**
Capacity Building										
Choice and Control	1,494	141	45%	1.01	676	1.00	669	99%	18%	81%
Daily Activities	4,348	760	23%	21.98	5,055	10.73	2,468	49%	16%	79%
Employment	434	34	94%	3.14	7,230	2.57	5,924	82%	18%	86%
Health and Wellbeing	975	163	32%	1.23	1,261	0.41	426	34%	14%	79%
Home Living	8	2	100%	0.02	2,282	0.00	538	24%	63%	75%
Lifelong Learning	1	0	0%	0.00	3,541	0.00	0	0%	0%	0%
Relationships	1,328	126	55%	9.19	6,919	4.15	3,128	45%	10%	74%
Social and Civic	231	61	75%	1.13	4,883	0.49	2,135	44%	16%	75%
Support Coordination	4,337	316	37%	12.80	2,952	9.42	2,171	74%	16%	79%
Capacity Building total	**4,387**	**962**	**28%**	**50.50**	**11,512**	**28.78**	**6,561**	**57%**	**16%**	**79%**
Capital										
Assistive Technology	1,854	221	67%	11.01	5,936	6.53	3,524	59%	17%	78%
Home Modifications	1,427	38	83%	9.35	6,551	4.76	3,334	51%	15%	79%
Capital total	**2,601**	**250**	**59%**	**20.35**	**7,825**	**11.29**	**4,341**	**55%**	**16%**	**79%**
All support categories	**4,388**	**1,439**	**42%**	**747.20**	**170,282**	**642.41**	**146,401**	**86%**	**16%**	**79%**

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.

Note: The sum of individual support categories do not equal the totals exactly due to a very small amount of missing information.

Appendix: Summary of market indicators
by support category – Queensland – 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 the NDIS helped with choice and control?
Core										
Consumables	57,420	662	35%	58.78	1,024	31.90	556	54%	56%	76%
Daily Activities	55,858	1,097	32%	684.73	12,258	413.06	7,395	60%	55%	76%
Community	55,900	684	25%	398.89	7,136	265.13	4,743	66%	55%	76%
Transport	53,473	313	31%	39.86	745	38.51	720	97%	55%	77%
Core total	**58,026**	**1,555**	**27%**	**1,182.26**	**20,375**	**748.59**	**12,901**	**63%**	**56%**	**76%**
Capacity Building										
Choice and Control	27,880	330	43%	17.98	645	17.23	618	96%	55%	76%
Daily Activities	62,450	1,678	31%	314.67	5,039	159.93	2,561	51%	56%	76%
Employment	3,042	132	80%	19.89	6,538	13.03	4,283	66%	40%	77%
Health and Wellbeing	5,320	299	38%	7.96	1,497	3.47	652	44%	60%	83%
Home Living	362	34	70%	0.36	991	0.05	125	13%	60%	71%
Lifelong Learning	8	1	100%	0.03	3,616	0.00	76	2%	88%	75%
Relationships	1,600	198	44%	8.39	5,245	3.40	2,126	41%	21%	67%
Social and Civic	6,887	314	39%	16.32	2,370	5.72	830	35%	45%	75%
Support Coordination	20,345	540	29%	44.98	2,211	30.12	1,481	67%	50%	74%
Capacity Building total	**62,999**	**1,993**	**28%**	**430.58**	**6,835**	**232.95**	**3,698**	**54%**	**56%**	**76%**
Capital										
Assistive Technology	18,502	588	42%	105.26	5,689	67.97	3,674	65%	68%	79%
Home Modifications	3,330	173	47%	13.71	4,118	10.67	3,205	78%	70%	81%
Capital total	**18,953**	**656**	**36%**	**118.98**	**6,277**	**78.65**	**4,149**	**66%**	**68%**	**79%**
All support categories	**63,276**	**3,039**	**24%**	**1,731.86**	**27,370**	**1,060.23**	**16,756**	**61%**	**56%**	**76%**

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 (94%) 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.

Note: The sum of individual support categories do not equal the totals exactly due to a very small amount of missing information.

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