The NDIS market

Australian Capital Territory

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 presentation provides the latest update to the Australian Capital Territory market presentation, using data as at 30 June 2020 (the previous presentation used data as at 31 December 2019). The presentation covers the key market metrics that the NDIA monitors across the Australian Capital Territory.

Accompanying this presentation 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 – Australian Capital Territory

Service district	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($m)	Total payments ($m)	Average payments ($m)	Utilisation
Australian Capital Territory							
ACT	1 Jul 14	7,488	225.48	30,112	164.55	21,975	73%
Australian Capital Territory total		**7,488**	**225.48**	**30,112**	**164.55**	**21,975**	**73%**
National total		**364,879**	**11,978.68**	**32,829**	**8,341.41**	**22,861**	**70%**

In the 30 June 2020 report, there were 7,488 active participants with approved plans registered in the Australian Capital Territory and 456 active providers. In the 30 June 2020 report, total plan budgets in the Australian Capital Territory over the 6 months from 1 October 2019 to 31 March 2020 amounted to $225m. Total payments over the same period amounted to $165m, resulting in a utilisation rate of 73%. In the 31 December 2019 report, the equivalent rate in the Australian Capital Territory was 74%, indicating a minor decrease in utilisation.

Summary of market indicators
by service district – Australian Capital Territory cont.

Service district	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?
Australian Capital Territory							
ACT	1 Jul 14	7,488	456	16.4	55%	66%	75%
Australian Capital Territory average		**7,488**	**456**	**16.4**	**55%**	**–**	**–**
Australian Capital Territory total		**7,488**	**456**	**–**	**–**	**66%**	**75%**
National average		**4,559**	**465**	**9.2**	**60%**	**–**	**–**
National total		**364,879**	**10,740**	**–**	**–**	**51%**	**71%**

In the Australian Capital Territory, 66% of respondent participants said that they chose who supported them and 75% said that the NDIS helped with choice and control. The comparative figures from the 31 December 2019 report were 65% and 74% respectively, indicating a minor improvement in responses.

Key indicators – Australian Capital Territory

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 level of utilisation in the Australian Capital Territory is 73%, higher than the national total (70%). Since the 31 December 2019 presentation, utilisation for the Australian Capital Territory has decreased from 74% to 73%. The national total increased from 69% to 70% over the same time period.

Provider concentration:

Provider concentration was 55% in the Australian Capital Territory, which is lower than the national average across districts (60%). 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 Australian Capital Territory has been in the Scheme for a long time, a low provider concentration can be expected. Provider concentration is 1 percentage point higher than in the 31 December 2019 presentation (54%). In contrast, the national average across districts is 1 percentage point lower than in the 31 December 2019 presentation (61%).

Key indicators – Australian Capital Territory cont.

Outcomes indicator on choice and control:

In the Australian Capital Territory, 66% of participants responded that they chose who supports them which is higher than the national total (51%). A higher level on the outcomes indicator along with low provider concentration suggests that the market in the district is healthy and participants feel they have sufficient choice of provider and supports. Since the 31 December 2019 report, the proportion of participants in the Australian Capital Territory who responded that they chose who supports them increased by 1 percentage point (from 65%).

Has the NDIS helped with choice and control?:

75% of participants in the Australian Capital Territory responded that the NDIS had helped with choice and control over support provision which is higher than the national total (71%). This result is consistent with the other indicator's suggestion that the Australian Capital Territory is a mature market and that participants feel they have sufficient choice and control over their providers and supports. Since the 31 December 2019 report, the proportion of participants in the Australian Capital Territory who responded that the NDIS had helped them with choice and control increased from 74% to 75%, a minor improvement.

Summary of market indicators
by support category – Australian Capital Territory

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	5,567	101	81%	4.72	847	2.18	392	46%	66%	75%
Daily Activities	5,678	154	60%	119.39	21,027	96.72	17,034	81%	65%	75%
Community	5,671	112	72%	38.58	6,804	26.88	4,740	70%	65%	75%
Transport	5,536	30	88%	5.56	1,004	5.64	1,018	101%	65%	75%
Core total	**5,885**	**240**	**58%**	**168.25**	**28,590**	**131.42**	**22,332**	**78%**	**66%**	**75%**
Capacity Building										
Choice and Control	2,741	60	90%	1.89	689	1.76	640	93%	61%	77%
Daily Activities	7,091	212	63%	30.54	4,306	16.75	2,363	55%	66%	75%
Employment	470	17	98%	3.21	6,833	1.97	4,182	61%	40%	72%
Health and Wellbeing	958	41	79%	1.45	1,516	0.74	770	51%	71%	82%
Home Living	11	0	0%	0.01	1,086	0.00	360	33%	50%	60%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	939	42	82%	3.05	3,244	1.30	1,385	43%	29%	79%
Social and Civic	1,827	54	78%	4.36	2,385	1.77	969	41%	58%	75%
Support Coordination	2,638	92	50%	5.05	1,916	3.67	1,391	73%	55%	77%
Capacity Building total	**7,379**	**294**	**58%**	**49.56**	**6,716**	**27.96**	**3,789**	**56%**	**65%**	**75%**
Capital										
Assistive Technology	1,654	85	73%	6.21	3,752	4.20	2,539	68%	78%	79%
Home Modifications	235	16	99%	1.46	6,231	0.97	4,114	66%	77%	80%
Capital total	**1,713**	**91**	**70%**	**7.67**	**4,477**	**5.17**	**3,016**	**67%**	**78%**	**79%**
All support categories	**7,488**	**456**	**55%**	**225.48**	**30,112**	**164.55**	**21,975**	**73%**	**66%**	**75%**

This slide shows the breakdown of the market indicators by support category in the Australian Capital Territory.

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.

The position in the 31 December 2019 was similar to position in the 30 June 2020 report.

Note: '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.
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 – Australian Capital Territory – 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	401	35	87%	0.80	1,998	0.31	782	39%	18%	87%
Daily Activities	429	59	71%	58.64	136,697	54.82	127,776	93%	21%	88%
Community	423	62	72%	9.84	23,251	7.06	16,682	72%	20%	88%
Transport	428	20	90%	0.52	1,224	0.47	1,092	89%	21%	88%
Core total	**429**	**100**	**66%**	**69.80**	**162,712**	**62.65**	**146,045**	**90%**	**21%**	**88%**
Capacity Building										
Choice and Control	227	21	88%	0.16	722	0.14	615	85%	21%	86%
Daily Activities	403	73	67%	1.41	3,503	0.70	1,725	49%	21%	87%
Employment	79	7	100%	0.55	6,933	0.43	5,505	79%	29%	69%
Health and Wellbeing	112	21	87%	0.15	1,375	0.09	759	55%	15%	89%
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	295	24	83%	0.82	2,777	0.30	1,031	37%	18%	89%
Social and Civic	93	21	85%	0.33	3,495	0.15	1,570	45%	27%	97%
Support Coordination	426	51	56%	0.88	2,077	0.71	1,674	81%	21%	88%
Capacity Building total	**429**	**119**	**59%**	**4.31**	**10,039**	**2.52**	**5,869**	**58%**	**21%**	**88%**
Capital										
Assistive Technology	193	31	92%	0.83	4,298	0.41	2,136	50%	7%	86%
Home Modifications	47	4	100%	0.19	4,087	0.04	895	22%	0%	75%
Capital total	**205**	**35**	**89%**	**1.02**	**4,984**	**0.45**	**2,216**	**44%**	**6%**	**87%**
All support categories	**429**	**183**	**64%**	**75.13**	**175,133**	**65.63**	**152,974**	**87%**	**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.

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 – Australian Capital Territory – 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	5,166	91	83%	3.91	758	1.87	362	48%	68%	74%
Daily Activities	5,249	140	79%	60.75	11,574	41.90	7,983	69%	67%	75%
Community	5,248	103	77%	28.75	5,478	19.83	3,778	69%	67%	75%
Transport	5,108	25	90%	5.03	986	5.17	1,012	103%	67%	75%
Core total	**5,456**	**217**	**75%**	**98.45**	**18,044**	**68.77**	**12,604**	**70%**	**68%**	**74%**
Capacity Building										
Choice and Control	2,514	60	90%	1.72	686	1.62	643	94%	63%	76%
Daily Activities	6,688	201	65%	29.13	4,355	16.06	2,401	55%	68%	74%
Employment	391	17	98%	2.66	6,813	1.53	3,914	57%	41%	72%
Health and Wellbeing	846	36	85%	1.30	1,535	0.65	772	50%	73%	81%
Home Living	11	0	0%	0.01	1,045	0.00	360	34%	50%	60%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	644	37	85%	2.23	3,457	1.00	1,547	45%	33%	75%
Social and Civic	1,734	49	79%	4.03	2,325	1.62	936	40%	59%	74%
Support Coordination	2,212	87	53%	4.17	1,884	2.96	1,336	71%	58%	75%
Capacity Building total	**6,950**	**279**	**59%**	**45.25**	**6,511**	**25.44**	**3,660**	**56%**	**67%**	**74%**
Capital										
Assistive Technology	1,461	79	73%	5.38	3,679	3.79	2,592	70%	81%	78%
Home Modifications	188	12	100%	1.27	6,767	0.92	4,918	73%	80%	80%
Capital total	**1,508**	**82**	**71%**	**6.65**	**4,408**	**4.71**	**3,125**	**71%**	**82%**	**79%**
All support categories	**7,059**	**424**	**66%**	**150.35**	**21,298**	**98.92**	**14,013**	**66%**	**67%**	**74%**

This slide shows the breakdown of the market indicators by support category in Australian Capital 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 (94%) of participants in the Australian Capital Territory do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the Australian Capital Territory participant population overall.

Note: '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.
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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