The NDIS market

Tasmania

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 Tasmania 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 4 service districts within Tasmania.

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 – Tasmania

Service district	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	2,303	88.87	38,587	62.20	27,009	70%
TAS North West	1 Jul 13	2,047	78.69	38,443	58.11	28,389	74%
TAS South East	1 Jul 13	1,735	58.02	33,443	40.93	23,593	71%
TAS South West	1 Jul 13	2,258	97.50	43,179	72.62	32,159	74%
Tasmania total		**8,343**	**323.08**	**38,725**	**233.86**	**28,031**	**72%**
National total		**364,879**	**11,978.68**	**32,829**	**8,341.41**	**22,861**	**70%**

In the 30 June 2020 report, there were 8,343 active participants with approved plans registered in Tasmania and 575 active providers. In the 30 June 2020 report, total plan budgets in Tasmania over the 6 months from 1 October 2019 to 31 March 2020 amounted to $323m. Total payments over the same period amounted to $234m, resulting in a utilisation rate of 72%. The utilisation rate for Tasmania is unchanged from the 31 December 2019 report at 72%.

Summary of market indicators
by service district – Tasmania 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?
Tasmania							
TAS North	1 Jul 13	2,303	271	8.5	63%	54%	64%
TAS North West	1 Jul 13	2,047	236	8.7	75%	56%	77%
TAS South East	1 Jul 13	1,735	284	6.1	65%	43%	58%
TAS South West	1 Jul 13	2,258	278	8.1	66%	57%	68%
Tasmania average		**2,086**	**267**	**7.9**	**67%**	**–**	**–**
Tasmania total		**8,343**	**575**	**–**	**–**	**53%**	**67%**
National average		**4,559**	**465**	**9.2**	**60%**	**–**	**–**
National total		**364,879**	**10,740**	**–**	**–**	**51%**	**71%**

State-wide, 53% of respondent participants said that they chose who supported them and 67% said that the NDIS helped with choice and control. The comparative figures from the 31 December 2019 report were 51% and 65% respectively, indicating a minor improvement in responses.

Key indicators – Tasmania

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 TAS North West and TAS South West (74%) and the lowest in TAS North (70%). In the 31 December 2019 report, the highest level of utilisation was seen in TAS North West and TAS South West (73%) and the lowest in TAS North and TAS South East (70%). Overall utilisation in Tasmania (72%) continues to be higher than the national total (70%). While utilisation increased by one percentage point in TAS North West and TAS South West, utilisation in TAS North remained unchanged.

Provider concentration:

Average provider concentration (across districts) in Tasmania (67%) is higher than the national average across districts (60%). However, average provider concentration (across districts) has decreased 4% from 71% since the 31 December 2019 report, while the national average dropped 1 percentage point from 61%. The highest concentration is in TAS North West (75%) and the lowest in TAS North (63%). Across all four districts, provider concentration has decreased compared to the 31 December 2019 presentation, with the largest drop observed for TAS North West (79% to 75%) and TAS South East (69% to 65%).

Key indicators – Tasmania cont.

Outcomes indicator on choice and control:

In TAS South West, 57% of participants responded that they chose who supports them, however in TAS South East, only 43% of participants responded that they had that choice. This compares to a national total of 51% (increased 1% from the 31 December 2019 report). Participants in districts 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 districts since the 31 December 2019 report with the largest improvement in TAS North West (from 53% to 56%).

Has the NDIS helped with choice and control?:

77% of participants in TAS North West responded that the NDIS had helped with choice and control over support provision, compared with 58% in TAS South East (the lowest in the state). The national total is 71%, 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 districts since the 31 December 2019 report, the largest increase being for TAS North (from 59% to 64%). The national total increased by 3 percentage points from 68% in the 31 December 2019 report.

Summary of market indicators
by support category – Tasmania

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	7,349	159	76%	5.95	810	3.23	439	54%	52%	69%
Daily Activities	7,304	168	60%	174.43	23,882	145.09	19,864	83%	52%	69%
Community	7,289	134	47%	70.92	9,730	45.25	6,208	64%	52%	68%
Transport	7,014	60	69%	5.85	834	5.13	731	88%	52%	69%
Core total	**7,573**	**315**	**55%**	**257.16**	**33,957**	**198.70**	**26,237**	**77%**	**52%**	**68%**
Capacity Building										
Choice and Control	2,177	49	87%	1.12	514	0.92	424	83%	59%	64%
Daily Activities	7,673	300	42%	32.59	4,247	13.87	1,807	43%	52%	68%
Employment	702	29	84%	4.56	6,500	3.06	4,362	67%	58%	72%
Health and Wellbeing	532	35	80%	0.72	1,346	0.25	476	35%	57%	65%
Home Living	25	1	100%	0.04	1,505	0.00	97	6%	60%	89%
Lifelong Learning	2	0	0%	0.00	1,252	0.00	0	0%	100%	0%
Relationships	834	44	74%	3.74	4,488	1.31	1,575	35%	19%	65%
Social and Civic	1,406	85	59%	5.52	3,928	2.07	1,472	37%	51%	61%
Support Coordination	3,419	105	49%	7.17	2,098	5.12	1,498	71%	44%	69%
Capacity Building total	**8,058**	**370**	**30%**	**55.46**	**6,883**	**26.61**	**3,303**	**48%**	**52%**	**68%**
Capital										
Assistive Technology	1,714	101	80%	7.94	4,633	6.43	3,749	81%	60%	71%
Home Modifications	721	25	78%	2.51	3,481	2.12	2,938	84%	36%	77%
Capital total	**2,051**	**112**	**73%**	**10.45**	**5,095**	**8.54**	**4,165**	**82%**	**53%**	**72%**
All support categories	**8,343**	**575**	**49%**	**323.08**	**38,725**	**233.86**	**28,031**	**72%**	**53%**	**67%**

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 Capacity Building – Choice and Control, which may be an area of increasing demand.
- The position in the 30 June 2020 report is generally more positive than in the 31 December 2019 report with respect to lower provider concentration across all support categories. The position in terms of outcomes indicators and overall utilisation have remained mostly similar between 30 June 2020 and 31 December 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 – Tasmania – 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	840	55	93%	1.10	1,304	0.58	693	53%	20%	73%
Daily Activities	848	66	69%	108.45	127,891	101.90	120,166	94%	20%	73%
Community	843	67	61%	27.81	32,984	21.64	25,673	78%	20%	73%
Transport	843	34	87%	1.19	1,416	0.82	971	69%	20%	73%
Core total	**848**	**130**	**66%**	**138.55**	**163,379**	**124.94**	**147,340**	**90%**	**20%**	**73%**
Capacity Building										
Choice and Control	139	15	96%	0.08	556	0.05	372	67%	22%	68%
Daily Activities	816	139	46%	3.56	4,367	1.24	1,524	35%	19%	73%
Employment	96	17	95%	0.65	6,728	0.50	5,174	77%	27%	84%
Health and Wellbeing	90	13	97%	0.10	1,141	0.03	302	26%	20%	69%
Home Living	0	0	0%	0.01	0	0.00	0	0%	0%	0%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	351	26	87%	1.74	4,944	0.68	1,938	39%	14%	72%
Social and Civic	77	26	85%	0.54	7,068	0.30	3,882	55%	29%	79%
Support Coordination	828	56	58%	2.02	2,445	1.46	1,767	72%	19%	73%
Capacity Building total	**844**	**195**	**32%**	**8.70**	**10,308**	**4.26**	**5,049**	**49%**	**20%**	**73%**
Capital										
Assistive Technology	261	30	95%	1.44	5,501	1.27	4,882	89%	16%	71%
Home Modifications	433	11	100%	1.58	3,652	1.35	3,107	85%	14%	78%
Capital total	**527**	**39**	**87%**	**3.02**	**5,725**	**2.62**	**4,970**	**87%**	**16%**	**75%**
All support categories	**848**	**281**	**64%**	**150.27**	**177,200**	**131.83**	**155,456**	**88%**	**20%**	**73%**

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.

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 – Tasmania – 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	6,509	150	72%	4.85	746	2.65	406	54%	59%	67%
Daily Activities	6,456	161	54%	65.98	10,220	43.19	6,689	65%	59%	67%
Community	6,446	127	43%	43.12	6,689	23.61	3,663	55%	59%	67%
Transport	6,171	54	58%	4.66	754	4.31	698	93%	59%	67%
Core total	**6,725**	**299**	**47%**	**118.61**	**17,637**	**73.75**	**10,967**	**62%**	**59%**	**67%**
Capacity Building										
Choice and Control	2,038	48	86%	1.04	512	0.87	428	84%	62%	63%
Daily Activities	6,857	288	44%	29.02	4,233	12.62	1,841	43%	59%	67%
Employment	606	29	83%	3.92	6,464	2.57	4,233	65%	62%	70%
Health and Wellbeing	442	34	80%	0.61	1,388	0.23	511	37%	65%	64%
Home Living	25	1	100%	0.03	1,251	0.00	97	8%	60%	89%
Lifelong Learning	2	0	0%	0.00	1,252	0.00	0	0%	100%	0%
Relationships	483	39	71%	2.01	4,156	0.63	1,312	32%	27%	52%
Social and Civic	1,329	81	57%	4.98	3,746	1.77	1,332	36%	52%	60%
Support Coordination	2,591	102	48%	5.15	1,987	3.66	1,412	71%	53%	66%
Capacity Building total	**7,214**	**358**	**32%**	**46.76**	**6,482**	**22.35**	**3,099**	**48%**	**59%**	**67%**
Capital										
Assistive Technology	1,453	94	77%	6.50	4,477	5.15	3,545	79%	70%	71%
Home Modifications	288	16	89%	0.93	3,225	0.77	2,683	83%	72%	73%
Capital total	**1,524**	**98**	**73%**	**7.43**	**4,877**	**5.92**	**3,887**	**80%**	**69%**	**70%**
All support categories	**7,495**	**549**	**40%**	**172.82**	**23,057**	**102.04**	**13,614**	**59%**	**59%**	**66%**

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 (90%) 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.

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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