The NDIS market

Australian Capital Territory

31 December 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 assist with achieving 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 31 December 2020 (the previous presentation used data as at 30 June 2020). The presentation covers the key market metrics that the NDIA monitors across the Australian Capital Territory.

Accompanying this presentation is the 31 December 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 April 2020 to the 30 September 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 April 2020 to 30 September 2020, using data available as at 31 December 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	7,906	256.87	32,490	185.60	23,476	72%
Australian Capital Territory total		**7,906**	**256.87**	**32,490**	**185.60**	**23,476**	**72%**
National total		**412,543**	**14,645.49**	**35,501**	**9,871.32**	**23,928**	**67%**

In the 31 December 2020 report, there were 7,906 active participants with approved plans registered in the Australian Capital Territory and 428 active providers[1]. Total plan budgets in the Australian Capital Territory over the 6 months from 1 April 2020 to 30 September 2020 amounted to $257m. Total payments over the same period amounted to $186m, resulting in a utilisation rate of 72%. In the 30 June 2020 report, the equivalent rate in the Australian Capital Territory was 73%, indicating a slight decrease in utilisation.

[1] Providers of agency-managed participants only. Self-managed participants and participants with a plan manager can use unregistered providers, and hence the total number of providers supporting participants will be higher than 428.

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	7,906	428	18.5	54%	66%	76%
Australian Capital Territory average		**7,906**	**428**	**18.5**	**54%**	**–**	**–**
Australian Capital Territory total		**7,906**	**428**	**–**	**–**	**66%**	**76%**
National average		**5,154**	**471**	**10.3**	**59%**	**–**	**–**
National total		**412,543**	**9,969**	**–**	**–**	**52%**	**72%**

In the Australian Capital Territory, 66% 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 30 June 2020 report were 66% and 75% respectively, indicating a small improvement only in responses regarding help with choice and control.

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 72%, higher than the national total (67%). Since the 30 June 2020 presentation, utilisation for the Australian Capital Territory slightly decreased from 73% to 72%. The national total decreased from 70% to 67% over the same time period.

Provider concentration:

Provider concentration was 54% in the Australian Capital Territory, which is lower than the national average across districts (59%). 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 one percentage point lower than in the 30 June 2020 presentation (55%). The national average across districts is also one percentage point lower than in the 30 June 2020 presentation (60%).

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 (52%). 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. Compared to the 30 June 2020 report, the proportion of participants in the Australian Capital Territory who responded that they chose who supports them remained the same (at 66%).

Has the NDIS helped with choice and control?:

76% 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 (72%). 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. Compared to the 30 June 2020 report, the proportion of participants in the Australian Capital Territory who responded that the NDIS had helped them with choice and control increased from 75% to 76%, a small 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	6,309	110	82%	5.35	848	2.64	419	49%	66%	76%
Daily Activities	6,348	176	56%	132.20	20,826	109.70	17,281	83%	66%	76%
Community	6,345	104	77%	43.95	6,926	27.93	4,402	64%	66%	76%
Transport	6,346	25	93%	5.89	929	5.78	910	98%	66%	76%
Core total	**6,405**	**251**	**57%**	**187.40**	**29,258**	**146.05**	**22,803**	**78%**	**66%**	**76%**
Capacity Building										
Choice and Control	3,087	72	88%	2.26	734	1.93	624	85%	61%	78%
Daily Activities	7,533	197	68%	37.45	4,972	21.56	2,862	58%	66%	76%
Employment	477	19	98%	3.60	7,554	1.56	3,273	43%	40%	73%
Health and Wellbeing	1,032	47	84%	1.76	1,708	0.89	862	50%	69%	83%
Home Living	12	2	100%	0.01	1,205	0.01	808	67%	50%	75%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	939	40	84%	3.44	3,665	1.53	1,627	44%	28%	80%
Social and Civic	1,931	46	79%	4.96	2,568	1.78	922	36%	57%	76%
Support Coordination	2,813	94	50%	5.69	2,024	4.17	1,483	73%	56%	78%
Capacity Building total	**7,794**	**283**	**57%**	**59.19**	**7,594**	**33.42**	**4,288**	**56%**	**66%**	**76%**
Capital										
Assistive Technology	1,729	82	78%	8.32	4,810	4.76	2,752	57%	79%	80%
Home Modifications	293	16	96%	1.96	6,705	1.37	4,686	70%	80%	83%
Capital total	**1,803**	**90**	**71%**	**10.28**	**5,702**	**6.13**	**3,400**	**60%**	**79%**	**80%**
All support categories	**7,906**	**428**	**54%**	**256.87**	**32,490**	**185.60**	**23,476**	**72%**	**66%**	**76%**

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 lower for these supports compared to the other support categories, indicating that there may be a more competitive market amongst providers offering these supports.
- The position in the 30 June 2020 was similar to position in the 31 December 2020 report.

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	432	40	88%	0.90	2,072	0.39	896	43%	21%	88%
Daily Activities	436	63	66%	62.07	142,371	60.15	137,959	97%	21%	88%
Community	432	62	79%	10.60	24,546	6.66	15,407	63%	21%	88%
Transport	435	17	96%	0.56	1,291	0.44	1,006	78%	21%	88%
Core total	**436**	**107**	**62%**	**74.13**	**170,033**	**67.63**	**155,116**	**91%**	**21%**	**88%**
Capacity Building										
Choice and Control	252	24	89%	0.20	786	0.18	717	91%	21%	86%
Daily Activities	415	58	77%	2.05	4,930	1.09	2,630	53%	22%	88%
Employment	74	7	100%	0.57	7,655	0.27	3,660	48%	18%	80%
Health and Wellbeing	139	26	85%	0.19	1,386	0.10	735	53%	15%	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	267	24	90%	0.87	3,274	0.39	1,454	44%	19%	92%
Social and Civic	79	19	92%	0.30	3,808	0.12	1,457	38%	25%	96%
Support Coordination	434	53	56%	0.96	2,211	0.78	1,804	82%	21%	88%
Capacity Building total	**436**	**115**	**59%**	**5.14**	**11,783**	**2.93**	**6,724**	**57%**	**21%**	**88%**
Capital										
Assistive Technology	210	29	85%	1.23	5,879	0.52	2,494	42%	18%	82%
Home Modifications	109	4	100%	0.77	7,086	0.49	4,495	63%	33%	82%
Capital total	**243**	**33**	**88%**	**2.01**	**8,259**	**1.01**	**4,172**	**51%**	**18%**	**83%**
All support categories	**436**	**167**	**60%**	**81.28**	**186,420**	**71.58**	**164,165**	**88%**	**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	5,877	98	83%	4.46	759	2.26	384	51%	68%	76%
Daily Activities	5,912	161	79%	70.13	11,862	49.55	8,381	71%	68%	76%
Community	5,913	92	81%	33.34	5,639	21.27	3,598	64%	68%	76%
Transport	5,911	22	93%	5.33	902	5.34	903	100%	68%	76%
Core total	**5,969**	**224**	**77%**	**113.26**	**18,975**	**78.42**	**13,138**	**69%**	**68%**	**75%**
Capacity Building										
Choice and Control	2,835	72	89%	2.07	729	1.74	615	84%	63%	77%
Daily Activities	7,118	192	69%	35.41	4,974	20.47	2,875	58%	68%	75%
Employment	403	18	97%	3.04	7,535	1.29	3,202	43%	43%	72%
Health and Wellbeing	893	40	88%	1.57	1,758	0.79	881	50%	72%	83%
Home Living	12	2	100%	0.01	1,205	0.01	808	67%	50%	75%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	672	33	85%	2.57	3,820	1.14	1,696	44%	31%	76%
Social and Civic	1,852	42	80%	4.66	2,515	1.66	899	36%	58%	75%
Support Coordination	2,379	88	53%	4.73	1,990	3.39	1,425	72%	59%	76%
Capacity Building total	**7,358**	**269**	**58%**	**54.05**	**7,346**	**30.49**	**4,144**	**56%**	**67%**	**75%**
Capital										
Assistive Technology	1,519	78	78%	7.08	4,662	4.23	2,787	60%	82%	80%
Home Modifications	184	13	97%	1.19	6,478	0.88	4,800	74%	85%	83%
Capital total	**1,560**	**84**	**74%**	**8.27**	**5,304**	**5.12**	**3,280**	**62%**	**83%**	**80%**
All support categories	**7,470**	**398**	**69%**	**175.59**	**23,506**	**114.03**	**15,265**	**65%**	**68%**	**75%**

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 results are similar to the results when all participants are considered (slide 8) – the majority (95%) 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: 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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