The NDIS market
Queensland

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

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 – 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	7,799	305.23	39,137	215.15	27,587	70%
Brisbane	1 Jul 18	14,929	630.44	42,229	436.93	29,267	69%
Bundaberg	1 Oct 17	2,463	84.09	34,140	61.24	24,863	73%
Caboolture/Strathpine	1 Jan 19	7,891	314.42	39,846	206.02	26,108	66%
Cairns	1 Jul 18	3,822	165.65	43,342	108.86	28,483	66%
Ipswich	1 Jul 17	6,588	235.42	35,735	160.92	24,426	68%
Mackay	1 Nov 16	2,776	91.08	32,811	59.93	21,590	66%
Maroochydore	1 Jan 19	6,608	258.82	39,168	175.24	26,519	68%
Maryborough	1 Jul 18	3,267	135.70	41,538	91.43	27,985	67%
Robina	1 Jul 18	7,667	269.77	35,186	193.57	25,247	72%
Rockhampton	1 Jan 18	4,410	148.18	33,601	93.93	21,300	63%
Toowoomba	1 Jan 17	5,364	209.60	39,076	143.75	26,799	69%
Townsville	1 Apr 16	5,203	188.13	36,158	128.72	24,739	68%
Queensland total		**78,787**	**3,036.55**	**38,541**	**2,075.69**	**26,346**	**68%**
National total		**412,543**	**14,645.49**	**35,501**	**9,871.32**	**23,928**	**67%**

In the 31 December 2020 report, there were 78,787 active participants with approved plans registered in Queensland and 2,850 active providers[1]. Total plan budgets in Queensland over the 6 months from 1 April 2020 to 30 September 2020 amounted to $3,037m. Total payments over the same period amounted to $2,076m, giving a utilisation rate of 68%. In the 30 June 2020 report, the equivalent rate for Queensland was 69%, indicating a small 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 2,850.

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	7,799	857	9.1	38%	49%	81%
Brisbane	1 Jul 18	14,929	1,236	12.1	36%	51%	79%
Bundaberg	1 Oct 17	2,463	253	9.7	80%	52%	80%
Caboolture/Strathpine	1 Jan 19	7,891	800	9.9	38%	50%	75%
Cairns	1 Jul 18	3,822	317	12.1	61%	53%	73%
Ipswich	1 Jul 17	6,588	885	7.4	30%	56%	75%
Mackay	1 Nov 16	2,776	258	10.8	55%	58%	77%
Maroochydore	1 Jan 19	6,608	578	11.4	46%	53%	83%
Maryborough	1 Jul 18	3,267	353	9.3	70%	51%	77%
Robina	1 Jul 18	7,667	676	11.3	44%	51%	77%
Rockhampton	1 Jan 18	4,410	359	12.3	64%	55%	78%
Toowoomba	1 Jan 17	5,364	564	9.5	39%	59%	80%
Townsville	1 Apr 16	5,203	441	11.8	48%	56%	76%
Queensland average		**6,061**	**583**	**10.5**	**50%**	**–**	**–**
Queensland total		**78,787**	**2,850**	**–**	**–**	**53%**	**78%**
National average		**5,154**	**471**	**10.3**	**59%**	**–**	**–**
National total		**412,543**	**9,969**	**–**	**–**	**52%**	**72%**

State-wide, 53% of respondent participants said that they chose who supported them and 78% said that the NDIS helped with choice and control. The comparative figures from the 30 June 2020 report were 51% and 76% respectively, indicating a small improvement in responses.

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 Bundaberg (73%) and the lowest in Rockhampton (63%). In the 30 June 2020 report, Bundaberg had the same utilisation rate of 73%, and Rockhampton had a higher utilisation rate of 65%.

Provider concentration:

Bundaberg had the highest level of provider concentration at 80%, while Ipswich had the lowest at 30%. 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 30 June 2020 report also showed Bundaberg with the highest provider concentration in Queensland (77%) and Ipswich as the lowest with 33%. While provider concentration increased by three percentage points in Bundaberg (from 77% to 80%), provider concentration in Ipswich has decreased (from 33% to 30%).

Key indicators
Queensland cont.

Outcomes indicator on choice and control:

In Toowoomba, 59% of participants responded that they chose who supports them, however in Beenleigh, 49% of participants responded that they had that choice. This compares to a national total of 52%. 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 30 June 2020 report, the percentage of participants who responded that they chose who supports them has increased by around two percentage points in Queensland, with the national total slightly increased by one percentage point from 51%.

Has the NDIS helped with choice and control?:

83% of participants in Maroochydore responded that the NDIS had helped with choice and control over support provision, compared with 73% in Cairns (the lowest in the State). The national total is 72%, indicating that overall Queensland districts are above average in this metric.

Since the 30 June 2020 report, the participants who responded that the NDIS had helped with choice and control over support provision has increased by two percentage points in Queensland compared to the national total that has increased by one percentage point.

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	74,068	727	38%	81.87	1,105	48.19	651	59%	53%	78%
Daily Activities	74,043	1,216	29%	1,492.90	20,163	1,141.28	15,414	76%	53%	78%
Community	74,033	715	27%	612.22	8,270	380.64	5,142	62%	53%	78%
Transport	73,966	379	35%	51.74	700	46.44	628	90%	53%	78%
Core total	**74,214**	**1,680**	**27%**	**2,238.73**	**30,166**	**1,616.54**	**21,782**	**72%**	**53%**	**78%**
Capacity Building										
Choice and Control	38,811	368	46%	27.40	706	26.43	681	96%	53%	78%
Daily Activities	78,034	1,578	34%	448.93	5,753	244.92	3,139	55%	53%	78%
Employment	3,542	157	74%	25.97	7,331	12.39	3,498	48%	38%	79%
Health and Wellbeing	6,255	291	38%	9.62	1,538	3.87	618	40%	52%	85%
Home Living	390	31	76%	0.39	994	0.05	121	12%	64%	75%
Lifelong Learning	7	1	100%	0.02	2,882	0.00	160	6%	100%	67%
Relationships	3,536	234	43%	23.35	6,604	11.35	3,210	49%	15%	74%
Social and Civic	7,894	265	46%	19.53	2,474	6.35	804	33%	44%	76%
Support Coordination	29,252	621	29%	72.93	2,493	51.99	1,777	71%	45%	77%
Capacity Building total	**78,518**	**1,893**	**28%**	**628.13**	**8,000**	**357.35**	**4,551**	**57%**	**53%**	**78%**
Capital										
Assistive Technology	22,111	615	38%	141.65	6,406	82.49	3,731	58%	62%	81%
Home Modifications	5,000	219	36%	28.00	5,600	19.27	3,854	69%	54%	81%
Capital total	**23,261**	**698**	**31%**	**169.65**	**7,293**	**101.76**	**4,375**	**60%**	**60%**	**81%**
All support categories	**78,787**	**2,850**	**25%**	**3,036.55**	**38,541**	**2,075.69**	**26,346**	**68%**	**53%**	**78%**

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 30 June 2020 or 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 – 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	4,678	354	49%	9.66	2,065	4.86	1,039	50%	17%	80%
Daily Activities	4,680	590	42%	637.42	136,202	592.06	126,508	93%	17%	80%
Community	4,676	420	34%	135.03	28,877	89.16	19,068	66%	17%	80%
Transport	4,679	231	41%	6.30	1,347	3.63	775	58%	17%	80%
Core total	**4,680**	**859**	**40%**	**788.42**	**168,465**	**689.71**	**147,374**	**87%**	**17%**	**80%**
Capacity Building										
Choice and Control	2,004	165	45%	1.55	774	1.54	770	100%	19%	83%
Daily Activities	4,649	725	25%	26.98	5,802	14.61	3,144	54%	17%	80%
Employment	357	38	91%	3.05	8,530	1.50	4,199	49%	18%	89%
Health and Wellbeing	854	144	33%	1.15	1,344	0.36	418	31%	16%	82%
Home Living	10	1	100%	0.01	1,054	0.00	62	6%	60%	50%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	1,454	141	50%	11.25	7,735	6.00	4,124	53%	11%	77%
Social and Civic	166	39	79%	0.80	4,830	0.31	1,889	39%	19%	71%
Support Coordination	4,635	338	39%	14.55	3,140	11.55	2,492	79%	17%	80%
Capacity Building total	**4,683**	**932**	**25%**	**59.33**	**12,670**	**35.88**	**7,661**	**60%**	**18%**	**80%**
Capital										
Assistive Technology	2,065	249	58%	16.09	7,793	8.86	4,291	55%	18%	80%
Home Modifications	1,502	53	72%	10.43	6,947	5.15	3,428	49%	18%	79%
Capital total	**2,764**	**286**	**48%**	**26.53**	**9,597**	**14.01**	**5,068**	**53%**	**17%**	**80%**
All support categories	**4,685**	**1,435**	**38%**	**874.28**	**186,612**	**739.60**	**157,865**	**85%**	**18%**	**80%**

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	69,390	700	38%	72.21	1,041	43.33	624	60%	57%	78%
Daily Activities	69,363	1,127	35%	855.48	12,333	549.22	7,918	64%	57%	78%
Community	69,357	685	28%	477.19	6,880	291.48	4,203	61%	57%	78%
Transport	69,287	339	36%	45.44	656	42.81	618	94%	57%	78%
Core total	**69,534**	**1,577**	**31%**	**1,450.32**	**20,858**	**926.83**	**13,329**	**64%**	**57%**	**78%**
Capacity Building										
Choice and Control	36,807	365	46%	25.84	702	24.89	676	96%	56%	78%
Daily Activities	73,385	1,505	35%	421.96	5,750	230.30	3,138	55%	57%	78%
Employment	3,185	153	72%	22.92	7,197	10.89	3,419	48%	40%	78%
Health and Wellbeing	5,401	260	41%	8.47	1,569	3.51	650	41%	59%	85%
Home Living	380	30	77%	0.38	993	0.05	123	12%	64%	76%
Lifelong Learning	7	1	100%	0.02	2,840	0.00	160	6%	100%	67%
Relationships	2,082	201	37%	12.10	5,814	5.36	2,572	44%	20%	70%
Social and Civic	7,728	263	46%	18.73	2,423	6.04	781	32%	45%	76%
Support Coordination	24,617	606	27%	58.37	2,371	40.44	1,643	69%	52%	76%
Capacity Building total	**73,835**	**1,823**	**30%**	**568.80**	**7,704**	**321.48**	**4,354**	**57%**	**57%**	**78%**
Capital										
Assistive Technology	20,046	592	36%	125.56	6,264	73.63	3,673	59%	69%	81%
Home Modifications	3,498	185	39%	17.56	5,021	14.12	4,037	80%	72%	83%
Capital total	**20,497**	**649**	**30%**	**143.13**	**6,983**	**87.76**	**4,281**	**61%**	**68%**	**81%**
All support categories	**74,102**	**2,732**	**29%**	**2,162.27**	**29,180**	**1,336.09**	**18,030**	**62%**	**57%**	**78%**

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 results are similar to the results when all participants are considered (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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