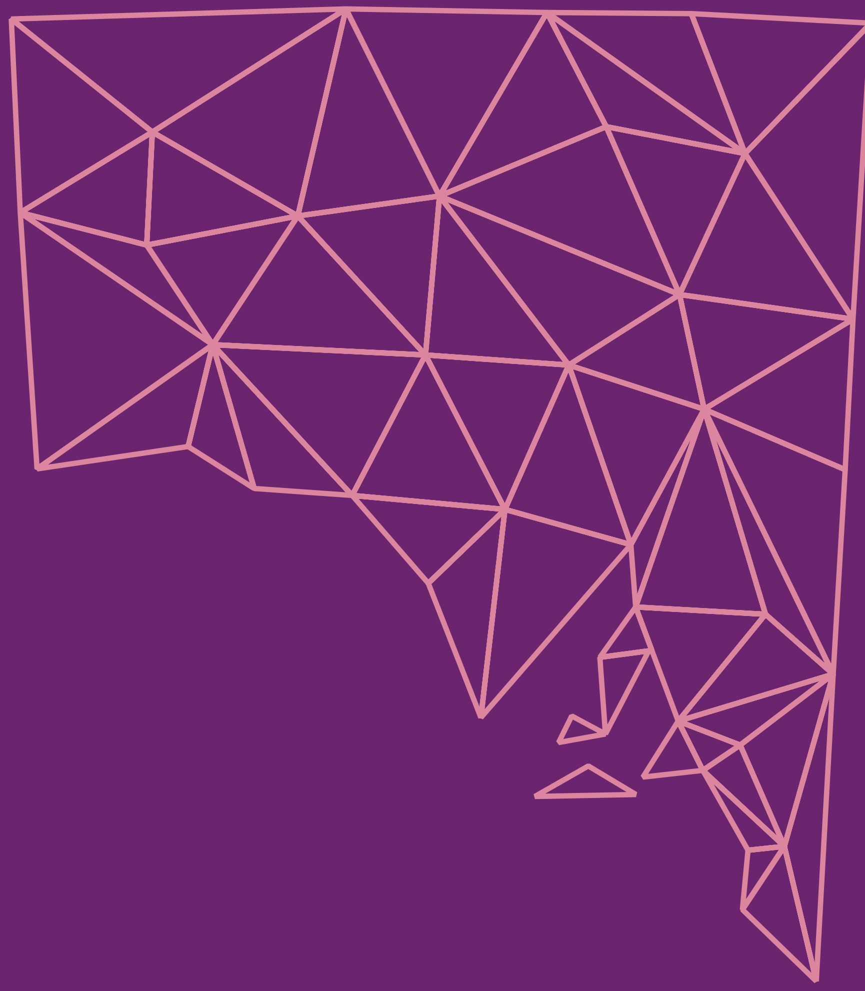
The NDIS market
South Australia
31 December 2020



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 South Australia 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 12 service districts within South Australia.

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 – South Australia

Service district	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
South Australia							
Adelaide Hills	1 Jul 13	1,369	42.14	30,785	27.94	20,412	66%
Barossa, Light and Lower North	1 Jul 13	1,767	44.14	24,981	28.71	16,246	65%
Eastern Adelaide	1 Jul 13	3,191	134.46	42,138	91.85	28,785	68%
Eyre and Western	1 Jul 13	1,148	39.98	34,823	21.03	18,320	53%
Far North (SA)	1 Jul 13	459	18.75	40,844	9.39	20,456	50%
Fleurieu and Kangaroo Island	1 Jul 13	972	35.71	36,739	23.81	24,497	67%
Limestone Coast	1 Jul 13	1,227	43.34	35,320	27.37	22,305	63%
Murray and Mallee	1 Jul 13	1,525	51.73	33,922	30.37	19,912	59%
Northern Adelaide	1 Jul 13	12,251	405.30	33,083	287.90	23,500	71%
Southern Adelaide	1 Jul 13	8,078	301.01	37,264	205.92	25,491	68%
Western Adelaide	1 Jul 13	3,245	119.12	36,708	80.84	24,912	68%
Yorke and Mid North	1 Jul 13	1,484	41.82	28,182	25.55	17,214	61%
South Australia total		**36,716**	**1,277.51**	**34,794**	**860.67**	**23,441**	**67%**
National total		**412,543**	**14,645.49**	**35,501**	**9,871.32**	**23,928**	**67%**

In the 31 December 2020 report, there were 36,716 active participants with approved plans registered in South Australia and 935 active providers[1]. Total plan budgets in South Australia over the 6 months from 1 April 2020 to 30 September 2020 amounted to $1,278m. Total payments over the same period amounted to $861m. This gives a utilisation rate of 67%. In the 30 June 2020 report, the equivalent rate for South Australia was 68%, 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 935.

Summary of market indicators
by service district – South Australia 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?
South Australia							
Adelaide Hills	1 Jul 13	1,369	175	7.8	70%	56%	61%
Barossa, Light and Lower North	1 Jul 13	1,767	235	7.5	61%	59%	70%
Eastern Adelaide	1 Jul 13	3,191	386	8.3	49%	57%	72%
Eyre and Western	1 Jul 13	1,148	106	10.8	85%	63%	63%
Far North (SA)	1 Jul 13	459	78	5.9	89%	48%	52%
Fleurieu and Kangaroo Island	1 Jul 13	972	140	6.9	84%	62%	76%
Limestone Coast	1 Jul 13	1,227	121	10.1	83%	61%	59%
Murray and Mallee	1 Jul 13	1,525	171	8.9	73%	58%	72%
Northern Adelaide	1 Jul 13	12,251	608	20.1	46%	56%	67%
Southern Adelaide	1 Jul 13	8,078	470	17.2	64%	53%	66%
Western Adelaide	1 Jul 13	3,245	400	8.1	52%	58%	72%
Yorke and Mid North	1 Jul 13	1,484	172	8.6	64%	60%	68%
South Australia average		**3,060**	**255**	**10.0**	**68%**	**–**	**–**
South Australia total		**36,716**	**935**	**–**	**–**	**56%**	**67%**
National average		**5,154**	**471**	**10.3**	**59%**	**–**	**–**
National total		**412,543**	**9,969**	**–**	**–**	**52%**	**72%**

State-wide, 56% 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 30 June 2020 report were 55% and 66% respectively, indicating a small improvement in responses.

Key indicators
South Australia

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 Northern Adelaide (71%) and the lowest in Far North (50%). In the 30 June 2020 report, Northern Adelaide had a utilisation rate of 70% and Far North had a rate of 48% (and was the lowest district in South Australia). Overall utilisation in South Australia (67%) has slightly decreased by one percentage point from 68% in the 30 June 2020 report.

Provider concentration:

The highest level of provider concentration was 89% in Far North and the lowest was 46% in Northern Adelaide. In the 30 June 2020 presentation, Far North was at 87% (and have since worsened) and Northern Adelaide was at 46% (and has remained unchanged).

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 Northern Adelaide has been in the Scheme since inception and has the most participants and plan budgets out of all the South Australia districts, a low provider concentration can be expected.

The average across districts in South Australia is 68%, which has decreased by one percentage point from 69% in the 30 June 2020 report. The national average across districts is 59%.

Key indicators
South Australia cont.

Outcomes indicator on choice and control:

In Eyre & Western, 63% of participants responded that they chose who supports them, however in Far North, 48% of participants responded that they had that choice. This compares to a national total of 52%.

In the 30 June 2020 report, Eyre & Western showed the highest proportion of participants responding that they chose who supports them (62%). Far North was the district with the lowest proportion with 45% of participants responding that they chose who supports them. The metric has increased across both two of these districts and the total in South Australia has increased by one percentage point.

Participants in Far North with poorer choice and control outcomes may thus benefit from increased choice (or information on their ability to choose).

Has the NDIS helped with choice and control?:

76% of participants in Fleurieu & Kangaroo Island (the highest proportion in the State) responded that the NDIS had helped with choice and control over support provision, compared with 52% in Far North (the lowest proportion in the State). The national total is 72%, indicating that participants in Far North may benefit from greater assistance from the NDIS in choosing their supports and services.

The response rate in Fleurieu & Kangaroo Island has not changed since the 30 June 2020 report. The response rate in Far North has increased by one percentage point since the 30 June 2020 report. The total response rate in South Australia has increased by one percentage point (from 66%).

Summary of market indicators
by support category – South Australia

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	33,526	293	52%	28.08	838	13.71	409	49%	56%	68%
Daily Activities	33,592	371	52%	708.85	21,102	550.61	16,391	78%	56%	68%
Community	33,567	261	40%	176.13	5,247	74.32	2,214	42%	56%	68%
Transport	33,355	92	59%	19.97	599	16.40	492	82%	56%	68%
Core total	**33,686**	**582**	**48%**	**933.03**	**27,698**	**655.05**	**19,446**	**70%**	**56%**	**68%**
Capacity Building										
Choice and Control	20,423	130	68%	15.06	737	14.13	692	94%	55%	67%
Daily Activities	36,242	505	58%	193.89	5,350	113.57	3,134	59%	56%	68%
Employment	2,935	75	79%	21.49	7,324	14.77	5,032	69%	49%	72%
Health and Wellbeing	1,396	62	68%	2.46	1,761	0.72	513	29%	56%	72%
Home Living	124	9	100%	0.10	823	0.01	57	7%	64%	60%
Lifelong Learning	19	5	100%	0.05	2,812	0.01	734	26%	23%	83%
Relationships	2,838	87	53%	16.26	5,731	6.27	2,209	39%	11%	62%
Social and Civic	1,807	74	66%	4.98	2,758	1.02	563	20%	52%	70%
Support Coordination	14,296	227	34%	30.83	2,156	18.12	1,268	59%	47%	65%
Capacity Building total	**36,550**	**618**	**51%**	**285.13**	**7,801**	**168.61**	**4,613**	**59%**	**56%**	**68%**
Capital										
Assistive Technology	8,324	211	58%	45.47	5,462	28.65	3,442	63%	63%	69%
Home Modifications	2,454	66	81%	13.84	5,640	8.31	3,388	60%	31%	68%
Capital total	**9,322**	**229**	**52%**	**59.31**	**6,362**	**36.97**	**3,966**	**62%**	**57%**	**69%**
All support categories	**36,716**	**935**	**44%**	**1,277.51**	**34,794**	**860.67**	**23,441**	**67%**	**56%**	**67%**

This slide shows the breakdown of the market indicators by support category in South Australia.

- 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.
- Since the 30 June 2020 report, utilisation has improved in the Capacity Building and Capital support categories.

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 – South Australia – 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	2,351	126	67%	4.07	1,732	2.02	858	50%	12%	66%
Daily Activities	2,361	157	61%	363.07	153,778	332.78	140,947	92%	13%	66%
Community	2,350	131	56%	38.33	16,312	17.82	7,582	46%	13%	66%
Transport	2,357	54	72%	3.22	1,365	1.55	659	48%	13%	66%
Core total	**2,361**	**266**	**58%**	**408.69**	**173,101**	**354.17**	**150,006**	**87%**	**13%**	**66%**
Capacity Building										
Choice and Control	1,458	55	78%	1.11	762	1.11	762	100%	15%	65%
Daily Activities	2,345	206	67%	13.96	5,952	8.30	3,541	59%	13%	66%
Employment	444	42	87%	3.64	8,194	2.63	5,925	72%	14%	74%
Health and Wellbeing	252	26	79%	0.31	1,221	0.08	315	26%	14%	67%
Home Living	1	0	0%	0.00	887	0.00	0	0%	100%	0%
Lifelong Learning	1	1	100%	0.01	5,694	0.00	4,282	75%	0%	100%
Relationships	1,276	62	66%	7.08	5,549	2.57	2,013	36%	7%	66%
Social and Civic	87	13	99%	0.37	4,207	0.09	998	24%	22%	65%
Support Coordination	2,334	132	44%	6.72	2,878	3.83	1,642	57%	12%	66%
Capacity Building total	**2,361**	**282**	**50%**	**33.18**	**14,054**	**18.61**	**7,884**	**56%**	**13%**	**66%**
Capital										
Assistive Technology	1,033	82	73%	7.32	7,082	4.72	4,572	65%	14%	64%
Home Modifications	1,687	24	97%	10.68	6,332	5.56	3,294	52%	11%	66%
Capital total	**1,925**	**98**	**73%**	**18.00**	**9,350**	**10.28**	**5,341**	**57%**	**12%**	**66%**
All support categories	**2,361**	**435**	**55%**	**459.87**	**194,778**	**383.06**	**162,245**	**83%**	**13%**	**66%**

This slide shows the breakdown of the market indicators by support category in South Australia, for participants with Supported Independent Living (SIL) and / or Specialist Disability Accommodation (SDA) supports.

- Daily Activities (Core) supports are the supports with the highest level of committed supports and payments. Provider concentration is relatively low for these supports indicating a 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 – South Australia – 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	31,175	278	52%	24.01	770	11.70	375	49%	63%	68%
Daily Activities	31,231	347	59%	345.78	11,072	217.83	6,975	63%	63%	68%
Community	31,217	248	41%	137.80	4,414	56.51	1,810	41%	63%	68%
Transport	30,998	76	63%	16.75	540	14.85	479	89%	63%	68%
Core total	**31,325**	**544**	**54%**	**524.34**	**16,739**	**300.88**	**9,605**	**57%**	**63%**	**68%**
Capacity Building										
Choice and Control	18,965	129	68%	13.95	735	13.02	687	93%	61%	68%
Daily Activities	33,897	488	59%	179.93	5,308	105.26	3,105	59%	63%	68%
Employment	2,491	71	78%	17.86	7,168	12.14	4,873	68%	55%	71%
Health and Wellbeing	1,144	57	72%	2.15	1,880	0.64	557	30%	68%	74%
Home Living	123	9	100%	0.10	823	0.01	58	7%	64%	60%
Lifelong Learning	18	4	100%	0.05	2,652	0.01	536	20%	25%	82%
Relationships	1,562	78	50%	9.18	5,879	3.70	2,370	40%	19%	55%
Social and Civic	1,720	71	65%	4.62	2,685	0.93	541	20%	54%	71%
Support Coordination	11,962	216	35%	24.11	2,016	14.29	1,195	59%	56%	65%
Capacity Building total	**34,189**	**588**	**52%**	**251.95**	**7,369**	**150.00**	**4,387**	**60%**	**63%**	**68%**
Capital										
Assistive Technology	7,291	207	57%	38.15	5,233	23.93	3,282	63%	74%	70%
Home Modifications	767	50	73%	3.16	4,116	2.76	3,592	87%	81%	71%
Capital total	**7,397**	**211**	**55%**	**41.31**	**5,585**	**26.69**	**3,608**	**65%**	**74%**	**70%**
All support categories	**34,355**	**889**	**50%**	**817.64**	**23,800**	**477.61**	**13,902**	**58%**	**63%**	**68%**

This slide shows the breakdown of the market indicators by support category in South Australia, 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 South Australia do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the South Australian 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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