ndis

The NDIS market

Tasmania

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 Tasmania 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 4 service districts within Tasmania.

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 – 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	2,631	106.97	40,656	73.11	27,788	68%
TAS North West	1 Jul 13	2,226	89.63	40,265	62.94	28,276	70%
TAS South East	1 Jul 13	1,994	70.53	35,372	49.72	24,936	70%
TAS South West	1 Jul 13	2,507	119.18	47,541	89.12	35,548	75%
Tasmania total		**9,358**	**386.31**	**41,281**	**274.89**	**29,375**	**71%**
National total		**412,543**	**14,645.49**	**35,501**	**9,871.32**	**23,928**	**67%**

In the 31 December 2020 report, there were 9,358 active participants with approved plans registered in Tasmania and 528 active providers[1]. In the 31 December 2020 report, total plan budgets in Tasmania over the 6 months from 1 April 2020 to 30 September 2020 amounted to $386m. Total payments over the same period amounted to $275m, resulting in a utilisation rate of 71%. The utilisation rate for Tasmania decreased by one percentage point from 72% in the 30 June 2020 report.

[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 528.

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	2,631	226	11.6	67%	55%	68%
TAS North West	1 Jul 13	2,226	247	9.0	72%	56%	79%
TAS South East	1 Jul 13	1,994	248	8.0	62%	46%	63%
TAS South West	1 Jul 13	2,507	257	9.8	62%	57%	70%
Tasmania average		**2,340**	**245**	**9.6**	**66%**	**–**	**–**
Tasmania total		**9,358**	**528**	**–**	**–**	**54%**	**70%**
National average		**5,154**	**471**	**10.3**	**59%**	**–**	**–**
National total		**412,543**	**9,969**	**–**	**–**	**52%**	**72%**

State-wide, 54% of respondent participants said that they chose who supported them and 70% said that the NDIS helped with choice and control. The comparative figures from the 30 June 2020 report were 53% and 67% respectively, indicating a small 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 South West (75%) and the lowest in TAS North (68%). In the 30 June 2020 report, the highest level of utilisation was seen in TAS North West and TAS South West (74%) and the lowest in TAS North (70%). Overall utilisation in Tasmania (71%) continues to be higher than the national total (67%). While utilisation increased by one percentage point in TAS South West, utilisation in the other three districts has decreased compared to the 30 June 2020 presentation, with the largest drop observed for TAS North West (74% to 70%).

Provider concentration:

Average provider concentration (across districts) in Tasmania (66%) is higher than the national average across districts (59%). However, average provider concentration (across districts) has decreased by one percentage point from 67% since the 30 June 2020 report, while the national average also dropped by one percentage point from 60%. The highest concentration is in TAS North West (72%) and the lowest in TAS South East and TAS South West (both at 62%). While provider concentration increased by four percentage points in TAS North (from 63% to 67%), provider concentration in the other three districts has decreased compared to the 30 June 2020 presentation, with the largest drop observed for TAS South West (66% to 62%).

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 46% of participants responded that they had that choice. This compares to a national total of 52% (increased by one percentage point from the 30 June 2020 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 in TAS North and TAS South East since the 30 June 2020 report, while it remained unchanged in TAS North West and TAS South West.

Has the NDIS helped with choice and control?:

79% of participants in TAS North West responded that the NDIS had helped with choice and control over support provision, compared with 63% in TAS South East (the lowest in the state). The national total is 72%, indicating that participants in TAS South East may benefit from greater assistance from the NDIS in choosing their supports and services.

The proportion of participants who say the NDIS helped with choice and control has increased for all districts since the 30 June 2020 report, the largest increase being for TAS South East (from 58% to 63%). The national total increased by one percentage point from 71% in the 30 June 2020 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	8,527	168	74%	7.25	850	4.23	496	58%	53%	72%
Daily Activities	8,539	193	54%	203.59	23,843	170.89	20,013	84%	53%	72%
Community	8,532	131	47%	81.93	9,603	48.22	5,652	59%	53%	72%
Transport	8,574	69	64%	6.41	748	5.50	641	86%	53%	72%
Core total	**8,653**	**333**	**51%**	**299.19**	**34,576**	**228.83**	**26,446**	**76%**	**54%**	**71%**
Capacity Building										
Choice and Control	3,433	60	86%	2.23	649	2.00	583	90%	57%	70%
Daily Activities	8,724	278	53%	43.08	4,938	19.85	2,275	46%	53%	71%
Employment	642	30	79%	4.81	7,494	2.79	4,351	58%	56%	74%
Health and Wellbeing	627	37	77%	1.03	1,638	0.38	602	37%	57%	72%
Home Living	37	1	100%	0.04	1,032	0.00	90	9%	56%	80%
Lifelong Learning	4	0	0%	0.00	86	0.00	0	0%	67%	100%
Relationships	963	45	76%	4.96	5,155	2.13	2,207	43%	20%	68%
Social and Civic	1,518	86	56%	6.00	3,952	1.97	1,297	33%	49%	64%
Support Coordination	3,992	101	49%	8.86	2,219	6.60	1,654	75%	46%	73%
Capacity Building total	**9,060**	**345**	**38%**	**71.01**	**7,837**	**35.72**	**3,943**	**50%**	**53%**	**71%**
Capital										
Assistive Technology	2,086	101	79%	13.13	6,296	7.80	3,741	59%	61%	76%
Home Modifications	807	29	78%	2.98	3,696	2.53	3,140	85%	42%	79%
Capital total	**2,388**	**116**	**73%**	**16.12**	**6,749**	**10.34**	**4,329**	**64%**	**56%**	**76%**
All support categories	**9,358**	**528**	**46%**	**386.31**	**41,281**	**274.89**	**29,375**	**71%**	**54%**	**70%**

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 31 December 2020 report is generally more positive than in the 30 June 2020 report with respect to lower provider concentration across almost all support categories. The position in terms of outcomes indicators and overall utilisation have remained mostly similar between 31 December 2020 and 30 June 2020 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	895	70	87%	1.23	1,377	0.73	815	59%	21%	75%
Daily Activities	896	85	65%	121.63	135,751	115.86	129,311	95%	21%	75%
Community	895	79	61%	30.93	34,555	23.77	26,559	77%	21%	75%
Transport	894	44	80%	1.32	1,478	0.82	919	62%	21%	75%
Core total	**896**	**163**	**63%**	**155.11**	**173,117**	**141.18**	**157,571**	**91%**	**21%**	**75%**
Capacity Building										
Choice and Control	234	18	93%	0.16	700	0.14	589	84%	24%	74%
Daily Activities	869	138	45%	4.21	4,847	1.86	2,137	44%	20%	75%
Employment	76	19	92%	0.69	9,101	0.45	5,982	66%	24%	86%
Health and Wellbeing	105	17	94%	0.14	1,315	0.04	355	27%	17%	69%
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	401	30	85%	2.40	5,990	1.14	2,837	47%	14%	75%
Social and Civic	81	27	81%	0.47	5,770	0.23	2,796	48%	32%	77%
Support Coordination	881	62	54%	2.22	2,523	1.70	1,932	77%	20%	75%
Capacity Building total	**894**	**203**	**31%**	**10.30**	**11,519**	**5.55**	**6,212**	**54%**	**20%**	**75%**
Capital										
Assistive Technology	301	44	88%	1.92	6,368	0.99	3,296	52%	17%	75%
Home Modifications	433	10	100%	1.75	4,049	1.45	3,351	83%	15%	79%
Capital total	**546**	**53**	**78%**	**3.67**	**6,722**	**2.44**	**4,474**	**67%**	**17%**	**77%**
All support categories	**896**	**296**	**61%**	**169.08**	**188,706**	**149.18**	**166,495**	**88%**	**21%**	**75%**

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	7,632	152	73%	6.02	788	3.50	459	58%	60%	71%
Daily Activities	7,643	180	56%	81.96	10,723	55.03	7,199	67%	60%	71%
Community	7,637	123	49%	51.01	6,679	24.45	3,201	48%	60%	71%
Transport	7,680	61	62%	5.09	663	4.67	609	92%	60%	71%
Core total	**7,757**	**307**	**51%**	**144.07**	**18,573**	**87.65**	**11,300**	**61%**	**60%**	**70%**
Capacity Building										
Choice and Control	3,199	59	86%	2.06	645	1.86	583	90%	60%	70%
Daily Activities	7,855	264	55%	38.87	4,948	17.99	2,290	46%	59%	70%
Employment	566	30	78%	4.12	7,278	2.34	4,132	57%	60%	72%
Health and Wellbeing	522	34	76%	0.89	1,702	0.34	652	38%	67%	73%
Home Living	37	1	100%	0.04	1,032	0.00	90	9%	56%	80%
Lifelong Learning	4	0	0%	0.00	86	0.00	0	0%	67%	100%
Relationships	562	41	73%	2.56	4,559	0.99	1,758	39%	30%	56%
Social and Civic	1,437	83	56%	5.53	3,850	1.74	1,213	32%	50%	63%
Support Coordination	3,111	97	48%	6.63	2,132	4.90	1,575	74%	55%	72%
Capacity Building total	**8,166**	**332**	**41%**	**60.71**	**7,434**	**30.17**	**3,694**	**50%**	**60%**	**70%**
Capital										
Assistive Technology	1,785	86	78%	11.22	6,284	6.81	3,816	61%	71%	76%
Home Modifications	374	20	91%	1.23	3,288	1.08	2,896	88%	76%	77%
Capital total	**1,842**	**92**	**75%**	**12.45**	**6,757**	**7.89**	**4,286**	**63%**	**70%**	**75%**
All support categories	**8,462**	**492**	**45%**	**217.23**	**25,671**	**125.71**	**14,856**	**58%**	**60%**	**69%**

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