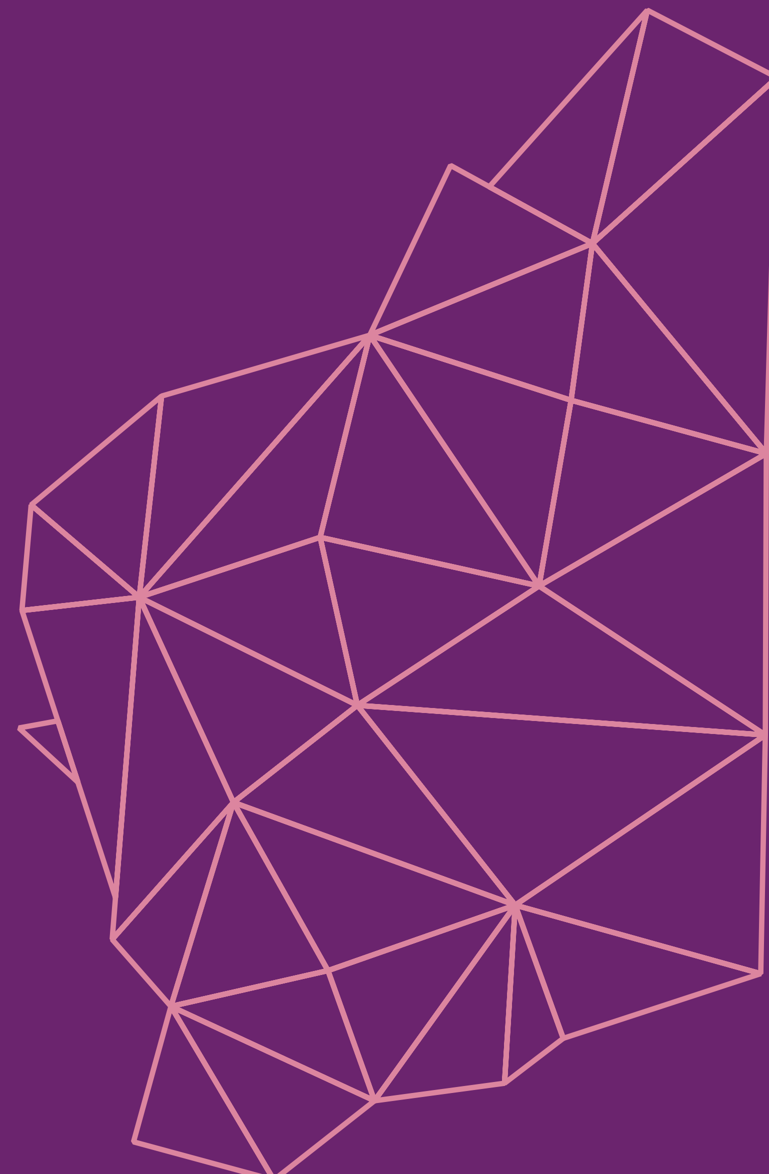

The NDIS market
Western Australia
31 December 2020

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 Western 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 Western 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 – Western Australia

Service district	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
Western Australia							
Central North Metro	1 Jul 19	3,817	143.53	37,602	86.23	22,590	60%
Central South Metro	1 Jul 18	4,440	145.47	32,764	93.51	21,061	64%
Goldfields-Esperance	1 Oct 18	546	20.24	37,073	10.69	19,586	53%
Great Southern	1 Jul 19	840	26.59	31,658	15.68	18,666	59%
Kimberley-Pilbara	1 Oct 18	1,069	41.54	38,860	20.19	18,887	49%
Midwest-Gascoyne	1 Jul 19	711	19.68	27,679	10.54	14,829	54%
North East Metro	1 Jul 14	5,765	214.01	37,122	146.05	25,333	68%
North Metro	1 Oct 18	4,479	132.44	29,570	80.24	17,915	61%
South East Metro	1 Jul 19	3,765	128.86	34,225	79.80	21,195	62%
South Metro	1 Jul 18	5,484	168.43	30,713	111.76	20,379	66%
South West	1 Sep 18	2,974	85.86	28,869	53.61	18,027	62%
Wheat Belt	1 Jan 17	855	22.77	26,637	11.98	14,017	53%
Western Australia total		**34,745**	**1,149.42**	**33,082**	**720.28**	**20,730**	**63%**
National total		**412,543**	**14,645.49**	**35,501**	**9,871.32**	**23,928**	**67%**

In the 31 December 2020 report, there were 34,745 active participants with approved plans registered in Western Australia and 932 active providers[1]. Total plan budgets in Western Australia over the 6 months from 1 April 2020 to 30 September 2020 amounted to $1,149m. Total payments over the same period amounted to $720m, giving a utilisation rate of 63%. In the 30 June 2020 report, the equivalent rate for Western Australia was also 63%, indicating no change in utilisation overall. However, utilisation in all of the four districts that have recently phased in (at 1 July 2019) has increased materially compared to the 30 June 2020 presentation, with the largest rise observed for Midwest-Gascoyne (40% to 54%).

[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 932.

Summary of market indicators
by service district – Western 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?
Western Australia							
Central North Metro	1 Jul 19	3,817	434	8.8	48%	44%	68%
Central South Metro	1 Jul 18	4,440	470	9.4	44%	56%	78%
Goldfields-Esperance	1 Oct 18	546	75	7.3	90%	42%	49%
Great Southern	1 Jul 19	840	86	9.8	93%	51%	69%
Kimberley-Pilbara	1 Oct 18	1,069	125	8.6	85%	53%	60%
Midwest-Gascoyne	1 Jul 19	711	74	9.6	94%	49%	59%
North East Metro	1 Jul 14	5,765	507	11.4	47%	52%	74%
North Metro	1 Oct 18	4,479	427	10.5	41%	48%	66%
South East Metro	1 Jul 19	3,765	471	8.0	39%	48%	77%
South Metro	1 Jul 18	5,484	503	10.9	41%	58%	75%
South West	1 Sep 18	2,974	215	13.8	80%	57%	69%
Wheat Belt	1 Jan 17	855	171	5.0	71%	48%	62%
Western Australia average		**2,895**	**297**	**9.4**	**64%**	**–**	**–**
Western Australia total		**34,745**	**932**	**–**	**–**	**52%**	**72%**
National average		**5,154**	**471**	**10.3**	**59%**	**–**	**–**
National total		**412,543**	**9,969**	**–**	**–**	**52%**	**72%**

State-wide, 52% of respondent participants said that they chose who supported them and 72% said that the NDIS helped with choice and control. The comparative figures from the 30 June 2020 presentation were also 52% and 72% respectively, indicating no change in responses.

Key indicators
Western 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 North East Metro (68%) and the lowest in Kimberley-Pilbara (49%). There could be a number of reasons for the lower utilisation in Kimberley-Pilbara, e.g. perhaps there are insufficient providers to obtain supports in participants' plans; however, it is worth noting there are a relatively small number of participants in the district (1,069).

North East Metro had also the highest level of utilisation in the 30 June 2020 report at 72% - indicating a slight worsening, but this was mainly driven by an increase in committed supports, rather than a drop in payments. Midwest-Gascoyne had the lowest utilisation in the 30 June 2020 report – 40%, which is no longer the case (Kimberley-Pilbara is now the lowest) as its utilisation has increased by 14 percentage points to 54% in the 31 December 2020 report. This district, which phased into the Scheme relatively recently has seen a large increase in utilisation as the Scheme matures in this district.

Provider concentration:

The highest level of provider concentration was 94% in Midwest-Gascoyne. The lowest was 39% in South East Metro. Generally, the lower the concentration, the more competitive the market is likely to be – as payments are going to a range of different providers.

In the 30 June 2020 report, Great Southern and Midwest-Gascoyne had the highest provider concentration of 94%, indicating no change in Midwest-Gascoyne, while Great Southern has decreased by one percentage point to 93% in the 31 December 2020 report. South East Metro had the lowest provider concentration at 36% in the 30 June 2020 report, indicating a slight worsening.

The average across districts in Western Australia is 64%, compared to 65% in the 30 June 2020 report.

Key indicators
Western Australia cont.

Outcomes indicator on choice and control:

In South Metro, 58% of participants responded that they chose who supports them, however in Goldfields-Esperance, 42% of participants responded that they had that choice. This is lower than the national total of 52%. Participants in districts with a lower level on the outcomes indicator may benefit from increased choice (or information on their ability to choose).

The proportion of participants responding that they chose who supported them in South West was 58% in the 30 June 2020 report – indicating no change. Goldfields-Esperance was at 44% in the 30 June 2020 report, indicating a slight worsening.

Has the NDIS helped with choice and control?:

78% of participants in Central South Metro responded that the NDIS had helped with choice and control over support provision, however in Goldfields-Esperance this was 49% (the lowest in the State), indicating that participants in Goldfields-Esperance may benefit from greater assistance from the NDIS in choosing their supports and services.

The proportion of participants responding that the NDIS had helped with choice and control in Central South Metro and Goldfields-Esperance was 77% and 46% respectively in the 30 June 2020 report – indicating a minor improvement in responses for both two districts.

Summary of market indicators
by support category – Western 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	29,666	313	64%	27.44	925	12.76	430	47%	52%	73%
Daily Activities	29,693	365	41%	523.21	17,621	401.66	13,527	77%	52%	73%
Community	29,690	238	36%	209.34	7,051	108.41	3,652	52%	52%	73%
Transport	29,904	113	46%	21.17	708	17.90	598	85%	52%	73%
Core total	**30,004**	**595**	**39%**	**781.15**	**26,035**	**540.73**	**18,022**	**69%**	**52%**	**73%**
Capacity Building										
Choice and Control	9,290	120	79%	6.38	687	5.27	568	83%	52%	66%
Daily Activities	33,388	450	53%	193.75	5,803	107.25	3,212	55%	51%	72%
Employment	3,652	63	89%	23.95	6,558	10.87	2,977	45%	37%	73%
Health and Wellbeing	1,186	51	69%	1.41	1,189	0.51	434	36%	46%	76%
Home Living	158	10	100%	0.17	1,050	0.03	162	15%	57%	57%
Lifelong Learning	20	4	100%	0.05	2,520	0.02	920	37%	10%	75%
Relationships	3,786	112	56%	15.82	4,179	5.55	1,466	35%	17%	65%
Social and Civic	5,056	141	41%	19.22	3,802	6.05	1,197	31%	43%	67%
Support Coordination	15,723	217	35%	28.46	1,810	15.13	962	53%	45%	70%
Capacity Building total	**34,195**	**573**	**43%**	**289.21**	**8,458**	**150.68**	**4,406**	**52%**	**51%**	**72%**
Capital										
Assistive Technology	11,852	269	50%	69.63	5,875	26.10	2,202	37%	59%	77%
Home Modifications	1,986	35	78%	7.82	3,936	1.15	580	15%	41%	79%
Capital total	**12,303**	**285**	**48%**	**77.44**	**6,295**	**27.25**	**2,215**	**35%**	**57%**	**77%**
All support categories	**34,745**	**932**	**35%**	**1,149.42**	**33,082**	**720.28**	**20,730**	**63%**	**52%**	**72%**

This slide shows the breakdown of the market indicators by support category in Western 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.
- The position has not changed significantly since the 30 June 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 – Western 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	2,220	121	81%	3.17	1,426	1.25	563	39%	16%	79%
Daily Activities	2,221	146	58%	212.00	95,455	197.56	88,951	93%	16%	79%
Community	2,222	135	51%	40.79	18,359	22.00	9,899	54%	16%	79%
Transport	2,222	66	60%	2.49	1,120	1.27	572	51%	16%	79%
Core total	**2,223**	**260**	**57%**	**258.45**	**116,263**	**222.08**	**99,900**	**86%**	**16%**	**79%**
Capacity Building										
Choice and Control	294	35	78%	0.21	702	0.16	559	80%	21%	76%
Daily Activities	2,187	155	62%	11.48	5,248	6.62	3,027	58%	16%	78%
Employment	419	19	98%	2.92	6,964	1.70	4,059	58%	15%	85%
Health and Wellbeing	214	18	95%	0.16	728	0.05	245	34%	16%	81%
Home Living	0	1	100%	0.00	0	0.00	0	14%	0%	0%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	966	51	79%	3.90	4,040	1.43	1,484	37%	9%	76%
Social and Civic	61	18	94%	0.41	6,793	0.17	2,799	41%	18%	67%
Support Coordination	2,089	108	46%	4.01	1,919	2.13	1,021	53%	16%	79%
Capacity Building total	**2,223**	**226**	**51%**	**23.08**	**10,384**	**12.27**	**5,521**	**53%**	**16%**	**78%**
Capital										
Assistive Technology	1,263	87	70%	7.08	5,605	1.97	1,557	28%	18%	81%
Home Modifications	1,037	9	100%	4.25	4,101	0.10	98	2%	15%	79%
Capital total	**1,659**	**94**	**69%**	**11.33**	**6,830**	**2.07**	**1,246**	**18%**	**17%**	**81%**
All support categories	**2,228**	**396**	**55%**	**292.97**	**131,493**	**236.52**	**106,157**	**81%**	**16%**	**79%**

This slide shows the breakdown of the market indicators by support category in Western Australia, 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, compared to supports in other categories.
- 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 – Western 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	27,446	301	64%	24.27	884	11.51	419	47%	56%	72%
Daily Activities	27,472	355	51%	311.20	11,328	204.10	7,429	66%	56%	72%
Community	27,468	230	36%	168.55	6,136	86.42	3,146	51%	56%	72%
Transport	27,682	106	51%	18.68	675	16.63	601	89%	56%	72%
Core total	**27,781**	**581**	**44%**	**522.70**	**18,815**	**318.65**	**11,470**	**61%**	**56%**	**72%**
Capacity Building										
Choice and Control	8,996	118	80%	6.18	686	5.11	568	83%	54%	66%
Daily Activities	31,201	442	54%	182.27	5,842	100.63	3,225	55%	55%	71%
Employment	3,233	62	87%	21.03	6,506	9.17	2,836	44%	40%	72%
Health and Wellbeing	972	50	69%	1.25	1,291	0.46	475	37%	56%	74%
Home Living	158	10	100%	0.16	1,042	0.03	161	15%	57%	57%
Lifelong Learning	20	4	100%	0.05	2,520	0.02	920	37%	10%	75%
Relationships	2,820	108	52%	11.92	4,227	4.12	1,460	35%	22%	59%
Social and Civic	4,995	140	41%	18.81	3,766	5.88	1,178	31%	44%	67%
Support Coordination	13,634	213	35%	24.45	1,793	13.00	953	53%	51%	69%
Capacity Building total	**31,972**	**565**	**44%**	**266.12**	**8,324**	**138.41**	**4,329**	**52%**	**55%**	**71%**
Capital										
Assistive Technology	10,589	259	50%	62.55	5,907	24.13	2,279	39%	66%	76%
Home Modifications	949	29	84%	3.56	3,755	1.05	1,107	29%	73%	80%
Capital total	**10,644**	**270**	**48%**	**66.11**	**6,211**	**25.18**	**2,366**	**38%**	**66%**	**76%**
All support categories	**32,517**	**914**	**37%**	**856.45**	**26,339**	**483.76**	**14,877**	**56%**	**56%**	**71%**

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

www.ndis.gov.au