

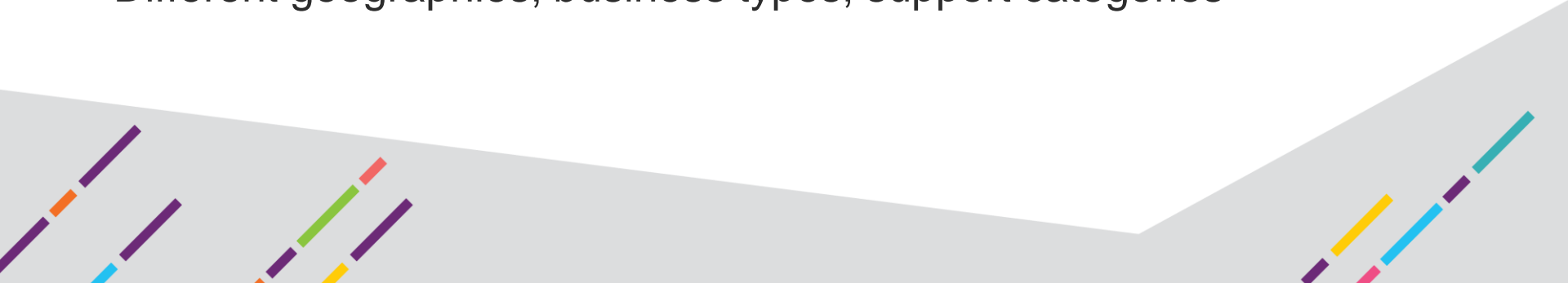


**Insights Forum**



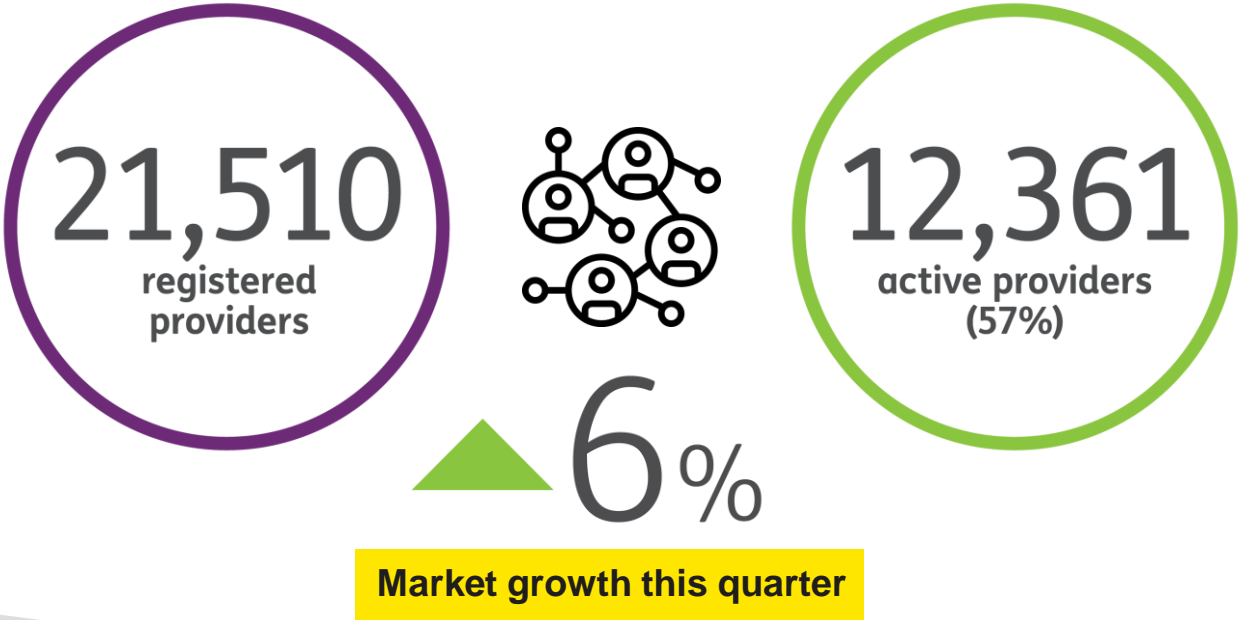
# Market data we collect



- Market size, concentration, growth and shrinkage
  - Provider numbers, business type and size, provider to participant ratio, payments claimed versus payments received
  - Participants with approved plans
  - Plan budgets versus payments received
  - Different geographies, business types, support categories
- 

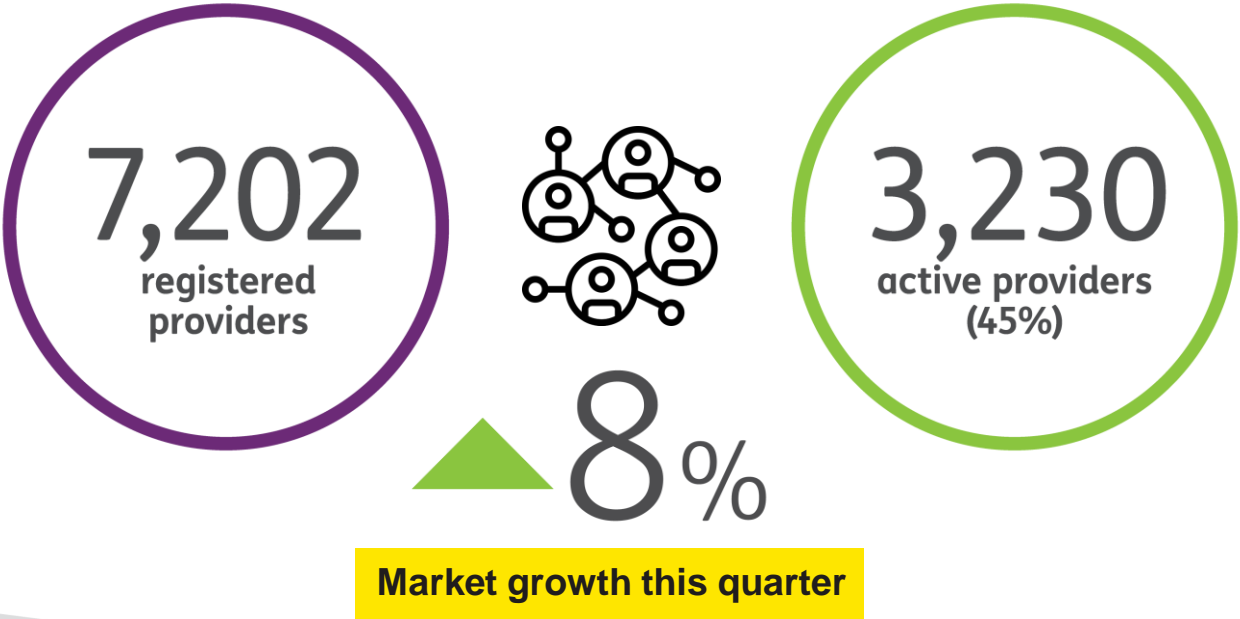
# Size of the market – national

At 30 June 2019:

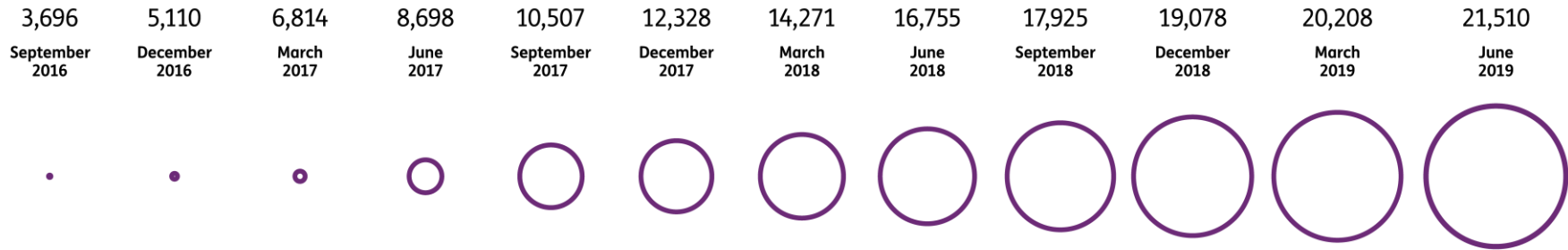


# Size of the market – Victoria

At 30 June 2019:



# Registered provider growth in the last 5 years – national

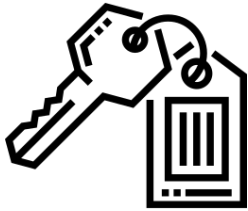


Source: COAG Disability Reform Council Quarterly Report June 2019, Fig. 31, pg. 50

# Snapshot:

## Specialist Disability Accommodation

Specialist Disability Accommodation is a **fast growing** and **significant provider** registration group



13,309

participants with  
SDA in their plan

8%  increase  
since last  
quarter



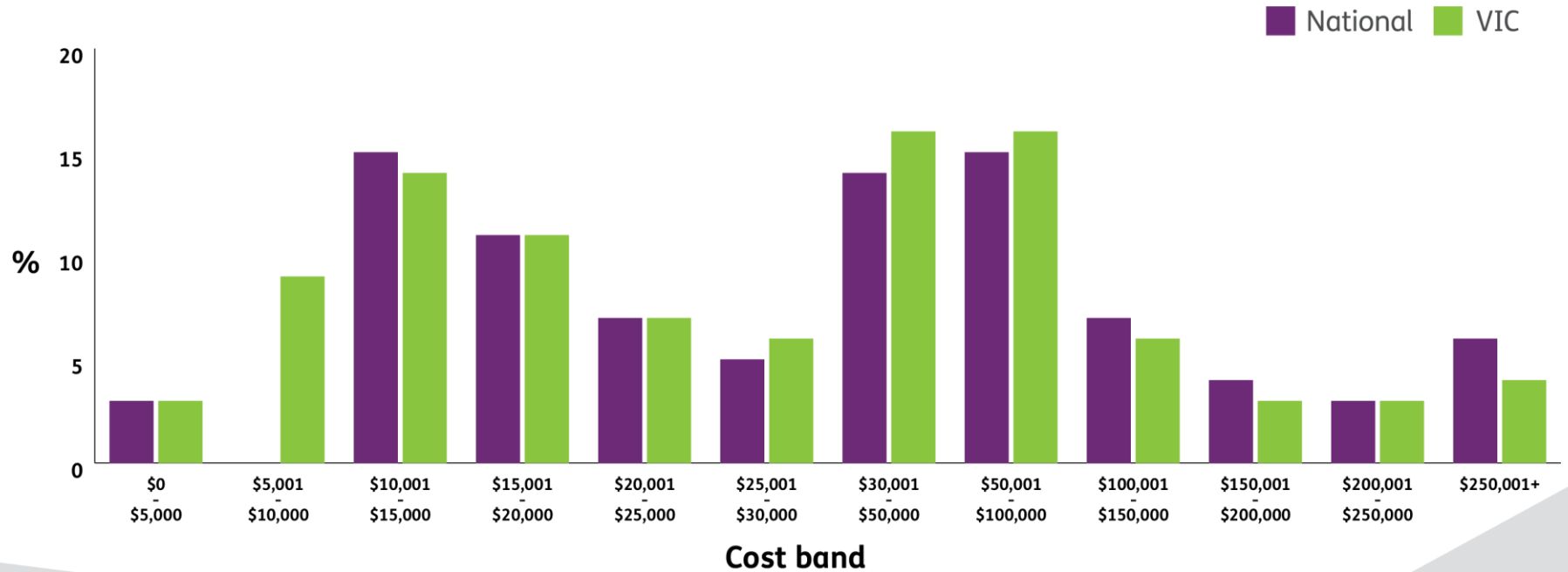
Insights Forum

# Plan budgets



# Distribution of plan budgets

At Q4 2018-19:



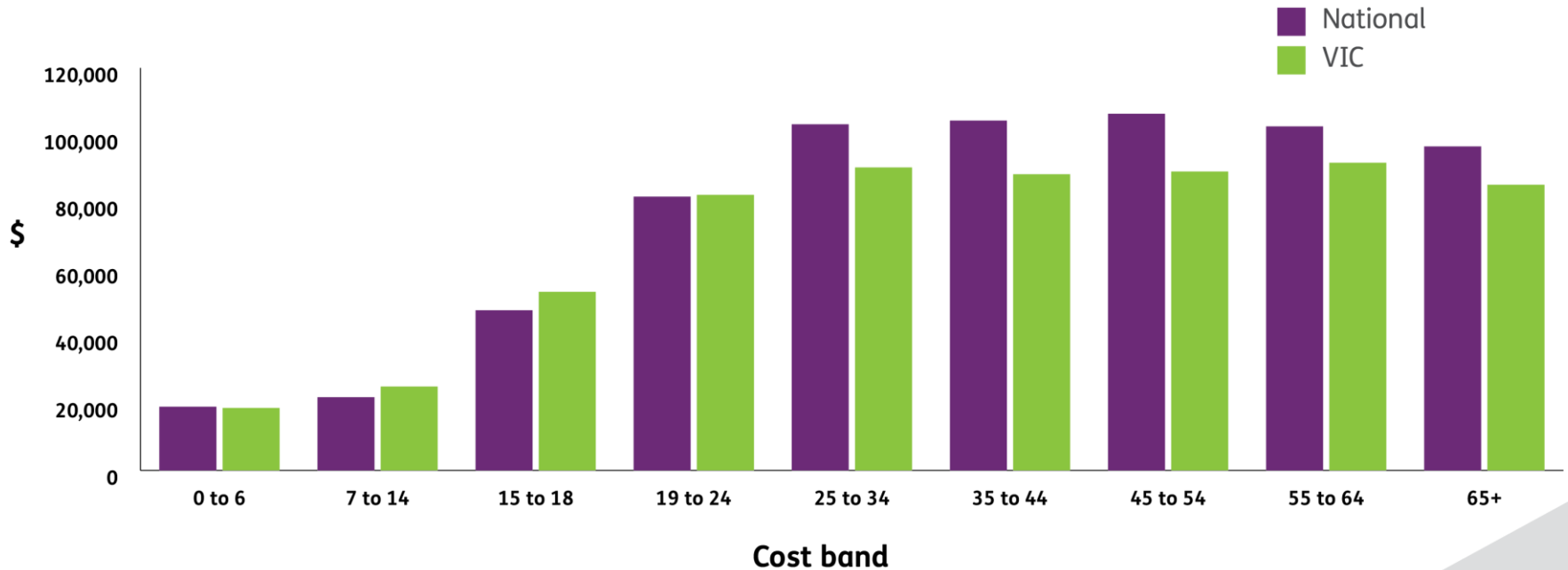
Sources: COAG Disability Reform Council Quarterly Performance Report – Victoria – 30 June 2019, pg. 27

COAG Disability Reform Council Quarterly Performance Report – National – 30 June 2019, pg. 27



# Distribution of plan budgets by age

At Q4 2018-19:

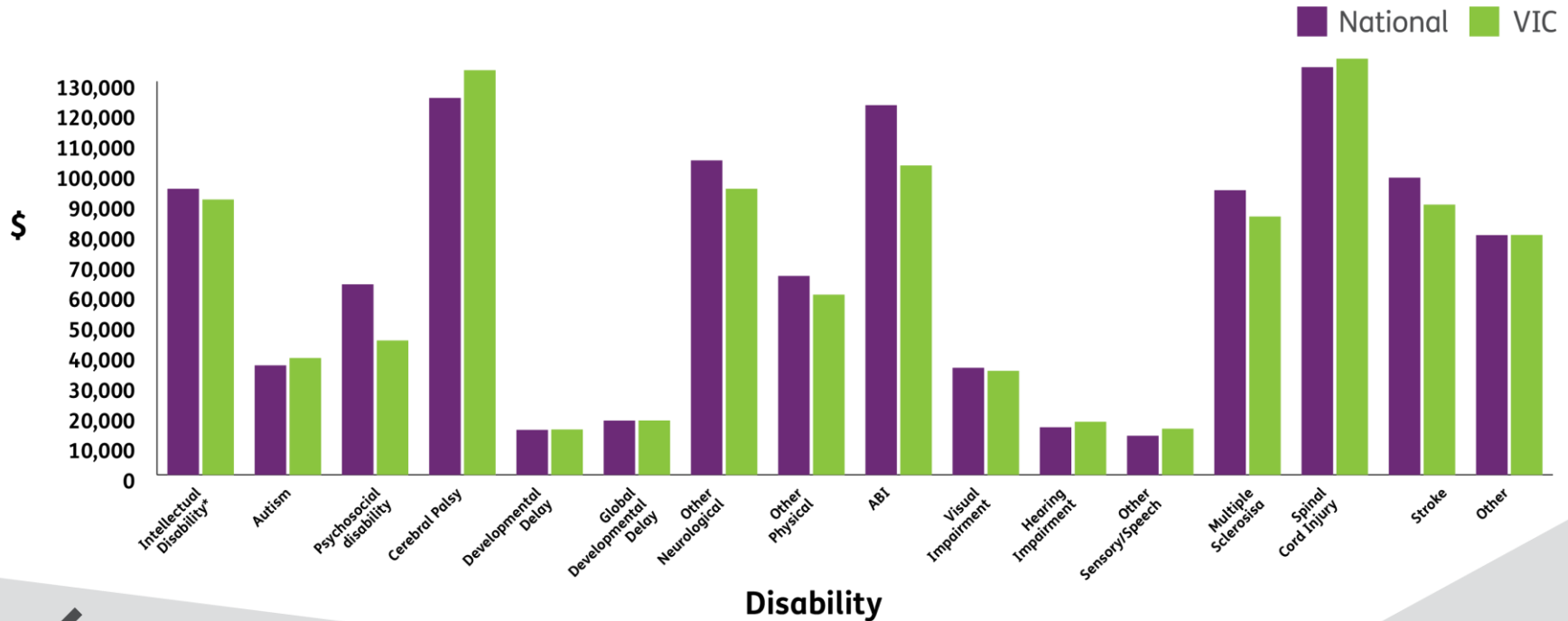


Sources: COAG Disability Reform Council Quarterly Performance Report – Victoria – 30 June 2019, pg. 28

COAG Disability Reform Council Quarterly Performance Report – National – 30 June 2019, pg. 28

# Distribution of plan budgets by disability

At Q4 2018-19:



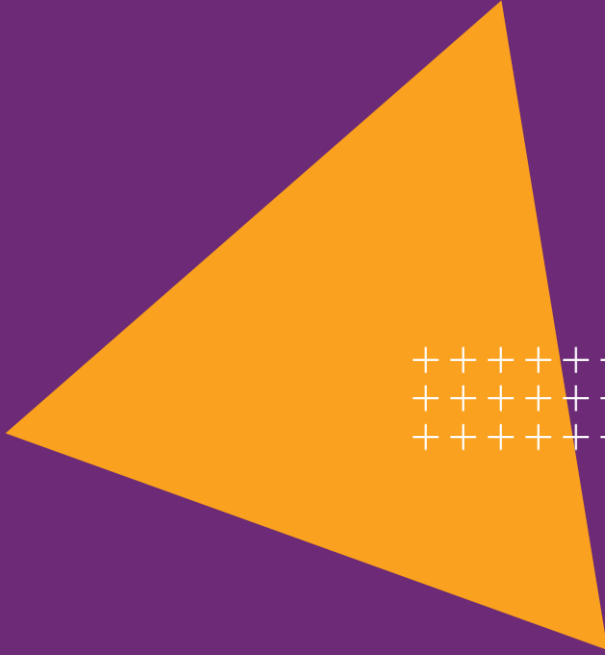
Sources: COAG Disability Reform Council Quarterly Performance Report – Victoria – 30 June 2019, pg. 29

COAG Disability Reform Council Quarterly Performance Report – National – 30 June 2019, pg. 29



Insights Forum

# Payments



# Value of the market

Payments to providers in the 12 months to 31 December 2018:

National

\$5.34bn

Victoria

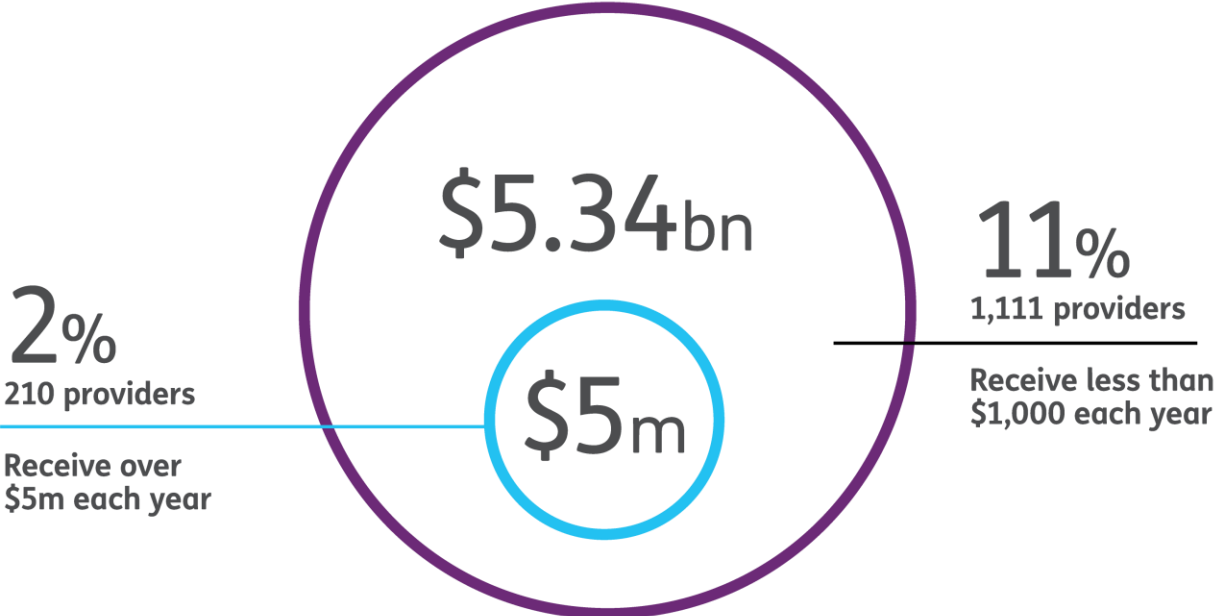
\$943.4m

# Increase in payments each quarter

Payments claimed by support quarter (at 31 March 2019):



# Distribution of registered provider payments



Source: Provider Growth Dashboard, as at 31 March 2019: distribution of registered providers by annual payments, pg. 1

# How this breaks down



Overall payments in the year to 31 December 2018

**Core supports**

**\$4.20<sub>bn</sub>**

**Capacity building**

**\$932<sub>m</sub>**

**Capital supports**

**\$206<sub>m</sub>**

# Market growth



Market growth in latest quarter  
(to 31 March 2019):

**National**

**Victoria**

11%

15%

Proportion of providers with growth  
in latest quarter (to 31 March 2019):

**National**

**Victoria**

53%

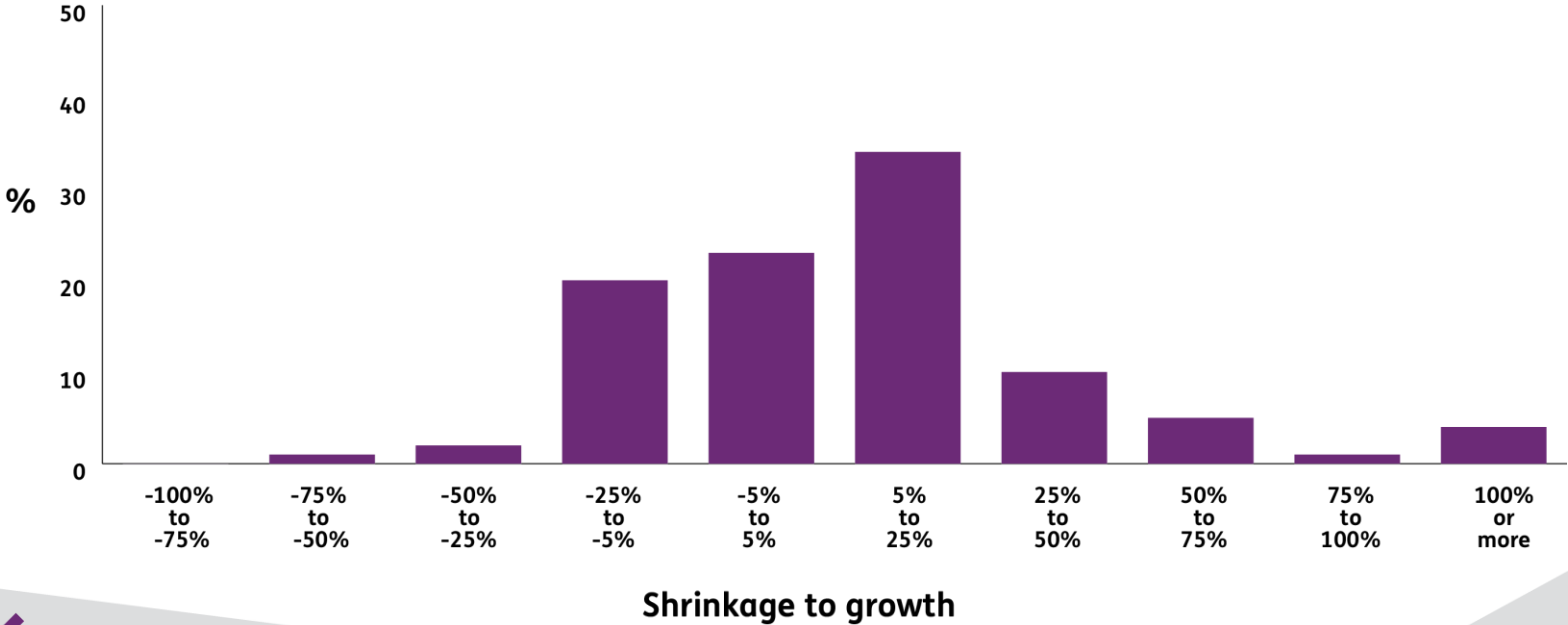
54%



# Large provider growth / shrinkage – Victoria



2018-19 Q1 payments of at least \$250,000

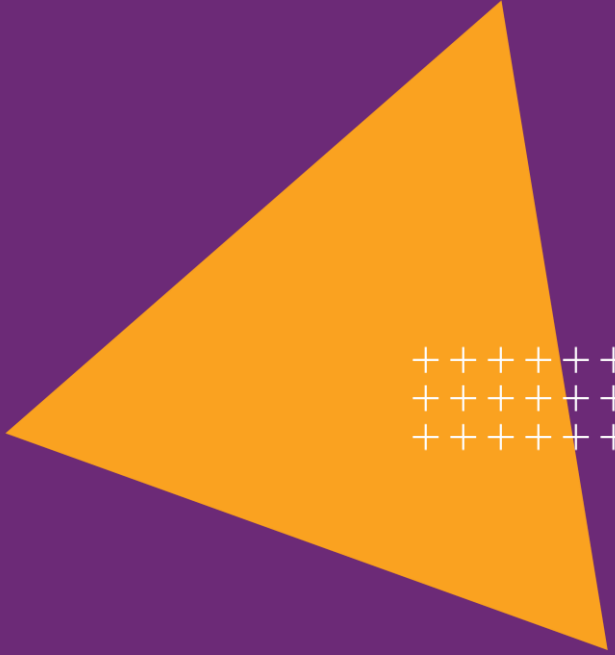


Source: Provider Growth Dashboard as at 31 March 2018: Payment Profile, pg. 11

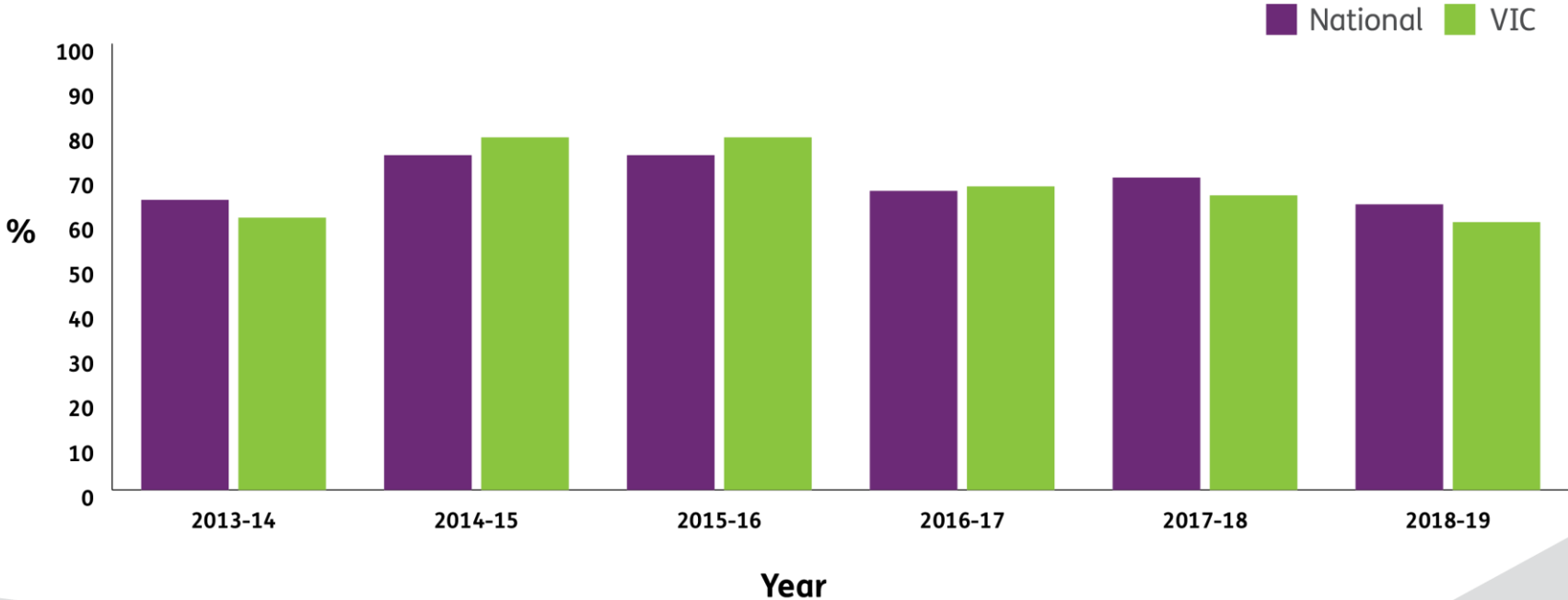


Insights Forum

# Utilisation

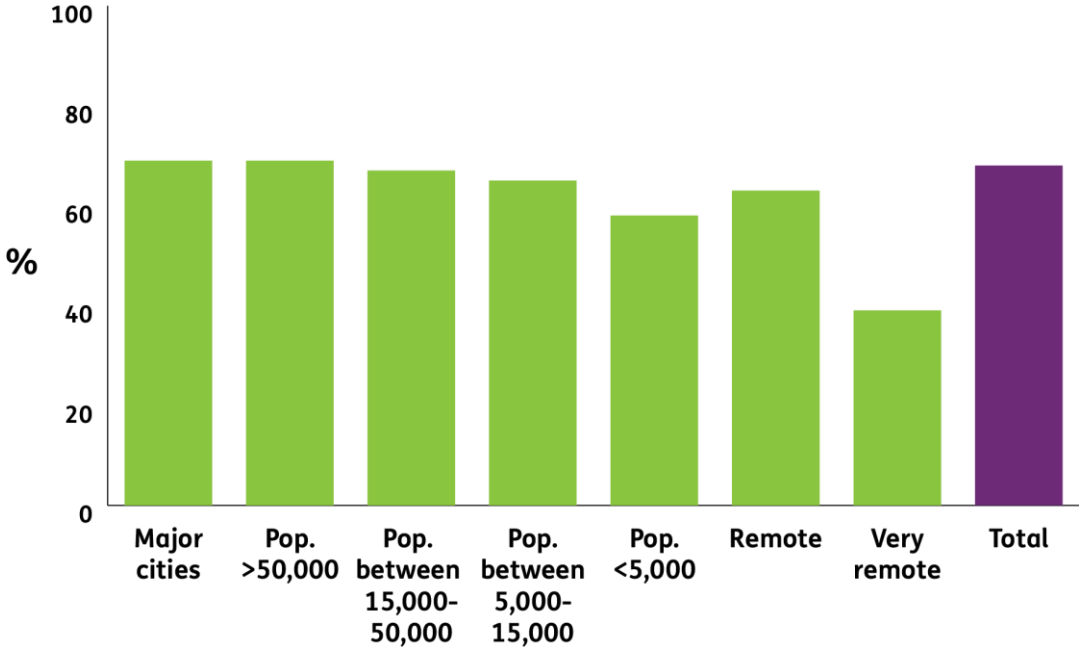


# Utilisation of committed supports



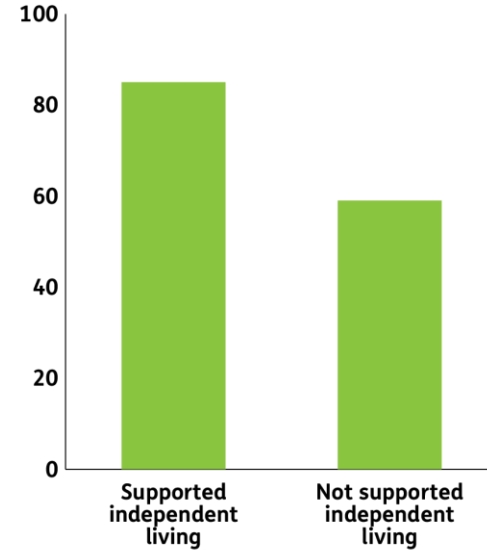
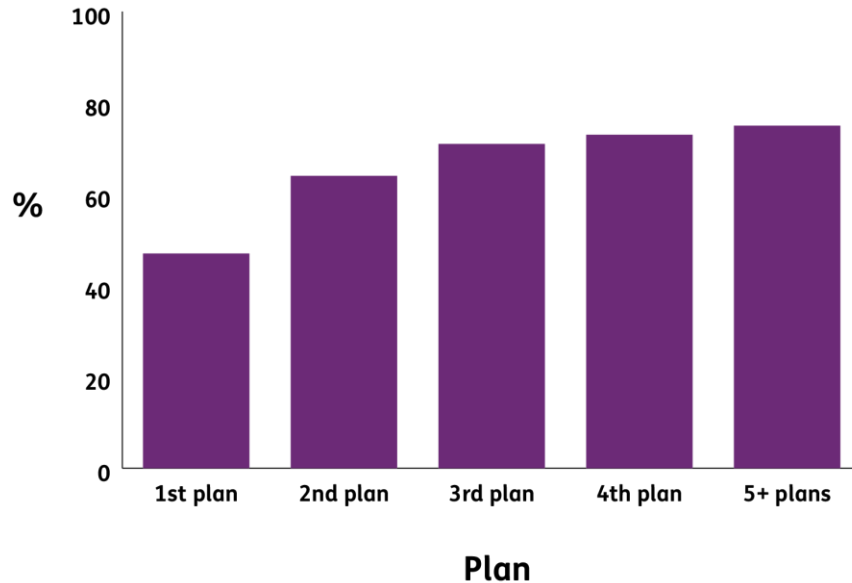
Sources: COAG Disability Reform Council Quarterly Performance Report – Victoria – 30 June 2019, pg. 31  
COAG Disability Reform Council Quarterly Performance Report – National – 30 June 2019, pg. 31

# Utilisation of supports by location

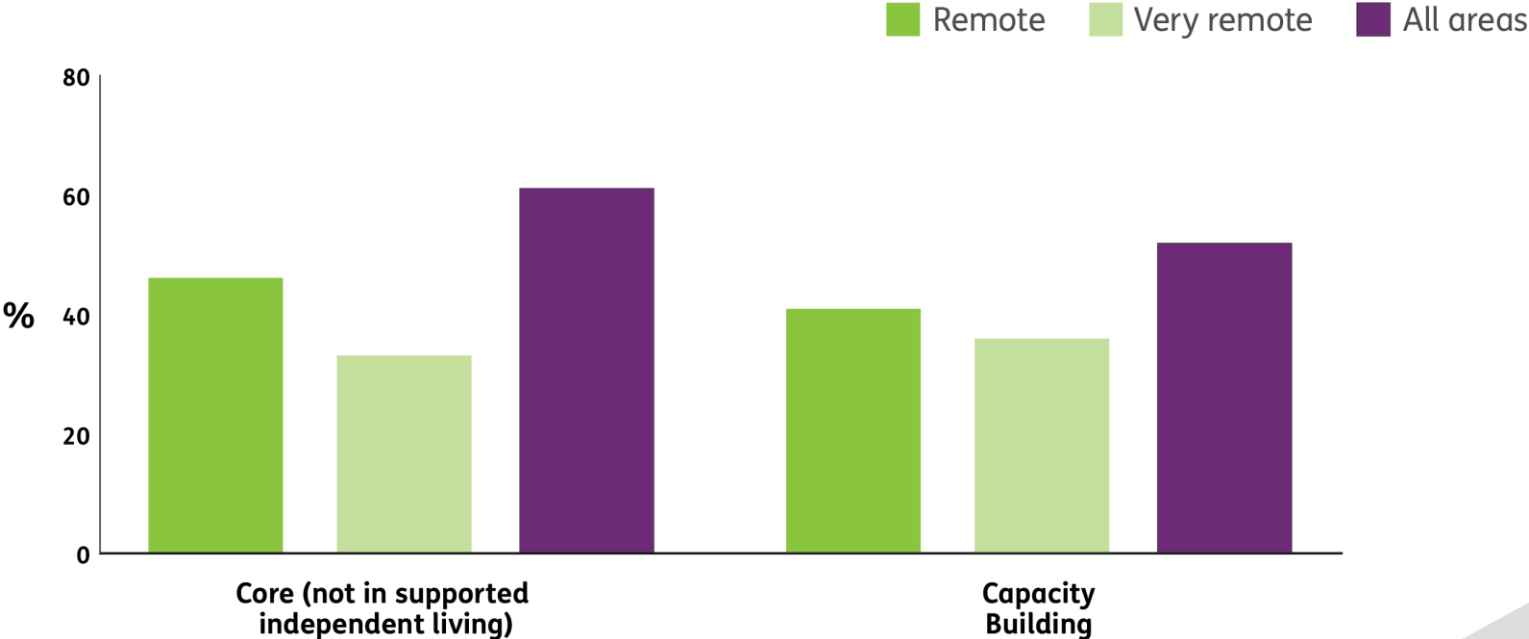


Source: COAG Disability Reform Council Quarterly Report June 2019, pg. 39

# Utilisation of supports by plan number / with or without SIL

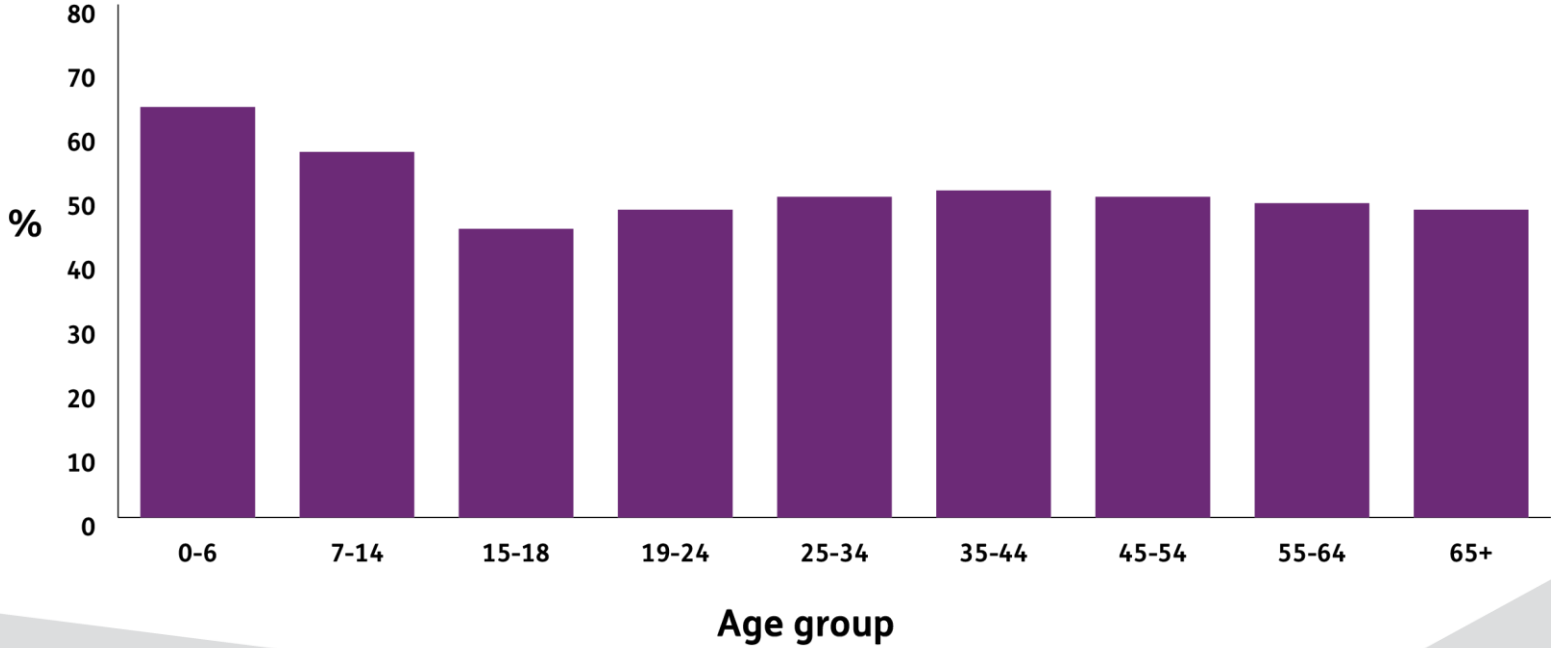


# Utilisation of supports in remote locations



Source: COAG Disability Reform Council Quarterly Report June 2019, pg. 41

# Utilisation of capacity building supports by age group



Source: COAG Disability Reform Council Quarterly Report June 2019, pg. 40



**Insights Forum**

# Providers' experiences





# 2018 provider survey



- Recent NDIS survey has given insights to the provider experience
- Over 18,000 providers received an invitation to the survey
- Response rate of 15%
- Survey ran from late November to early December 2018
- Analysis shows where experience has improved, and where improvements can be made



# Providers' experience is improving



- General improvement in quality of information provided
- NDIS website information is more accurate
- Improved reliability when engaging with the Agency
- Better access to Agency staff
- Quicker turnaround on queries
- Some improvement in claim processing



# Provider and market optimism



39%

of providers felt optimistic about the health of the NDIS market in Q2 2018-19

**Victoria**

67%

of providers felt competition will increase in the next 12 months in Q2 2018-19

**Victoria**

71%

of providers felt there are opportunities in the NDIS market for business growth in Q2 2018-19

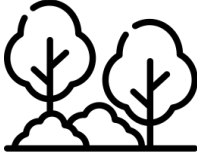
**Victoria**



# Future market opportunities



**Capacity supports**  
boosting independence  
and decreasing reliance  
on core support



**Remote and very remote**  
core and capacity building  
support



# Looking ahead

The NDIA is looking to make further improvements to many areas, particularly:



Payments



Provider portal information



Engaging with providers



**Insights Forum**

