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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:

21,510
registered providers

12,361
active providers (57%)

▲ 6%

Market growth this quarter

Source: *COAG Disability Reform Council Quarterly Report June 2019, pg. 49*

Size of the market – Queensland

At 30 June 2019:

5,964 registered providers

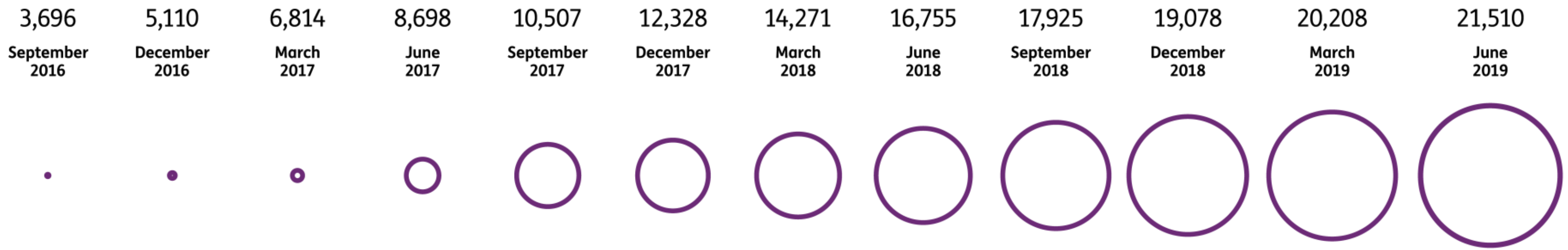
2,681 active providers (45%)

▲10%

Market growth this quarter

Source: *COAG Disability Reform Council Quarterly Performance Report – Queensland – 30 June 2019, pg. 3*

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

Source: *COAG Disability Reform Council Quarterly Report June 2019, pg. 49*

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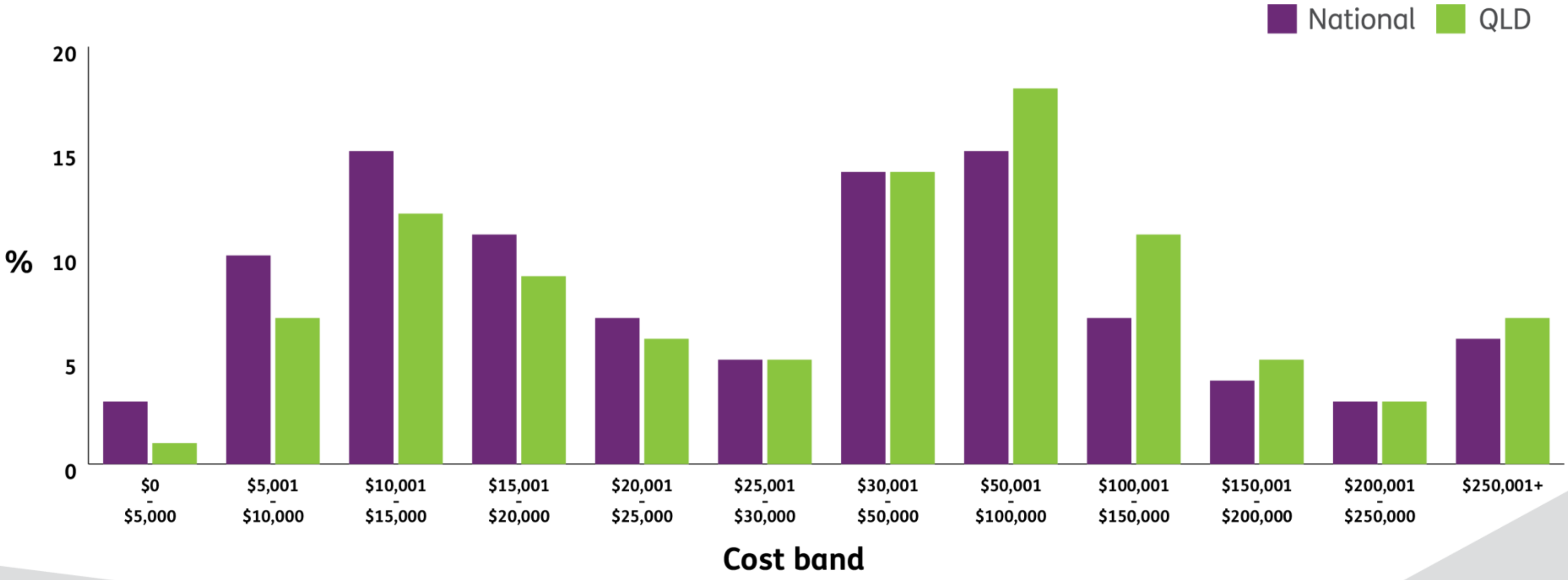
Plan budgets

Distribution of plan budgets

At Q4 2018-19:

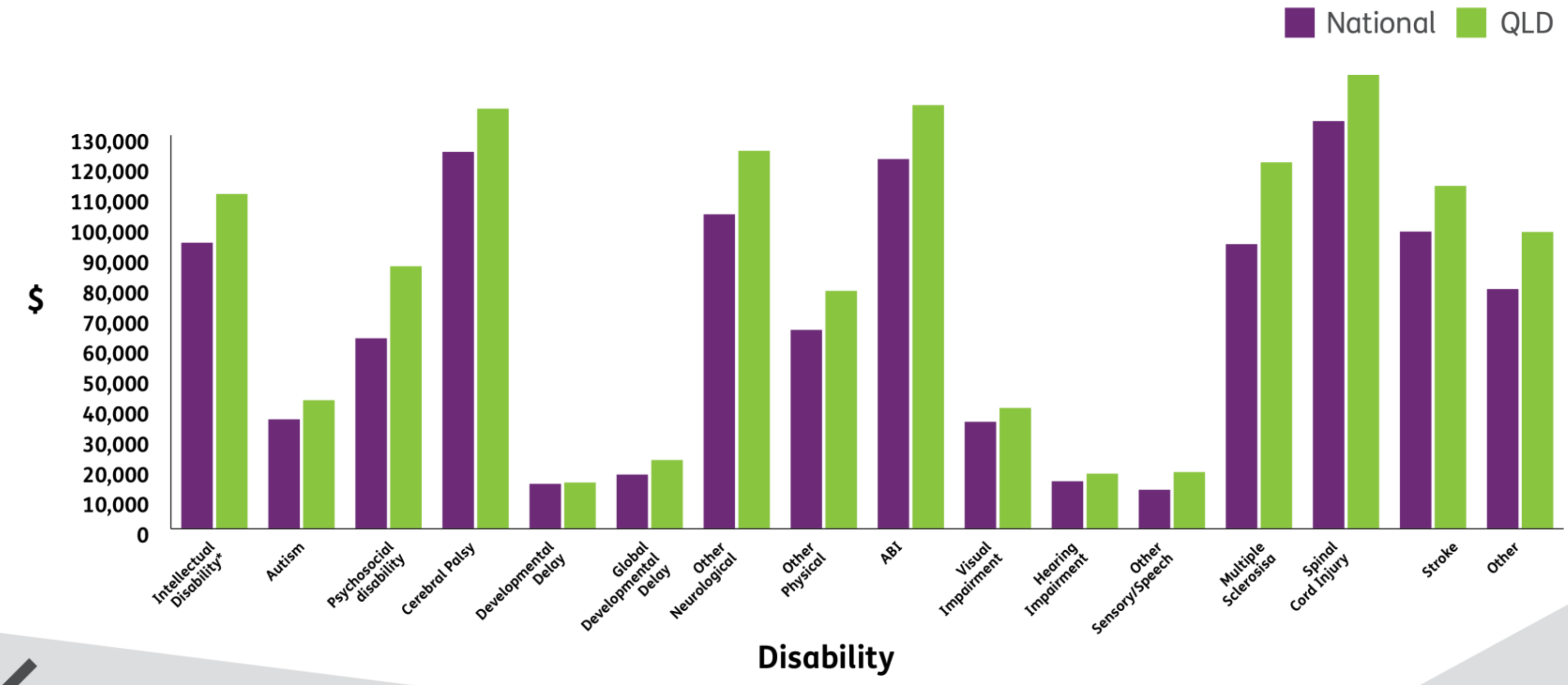


Sources: *COAG Disability Reform Council Quarterly Performance Report – Queensland – 30 June 2019, pg. 27*

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

Distribution of plan budgets by disability

At Q4 2018-19:



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

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

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Payments

Value of the market

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

National

$5.34bn

Queensland

$651.8m

Source: *Provider Growth Dashboard, as at 31 March 2019: Market Insights, pg.1 and 12*

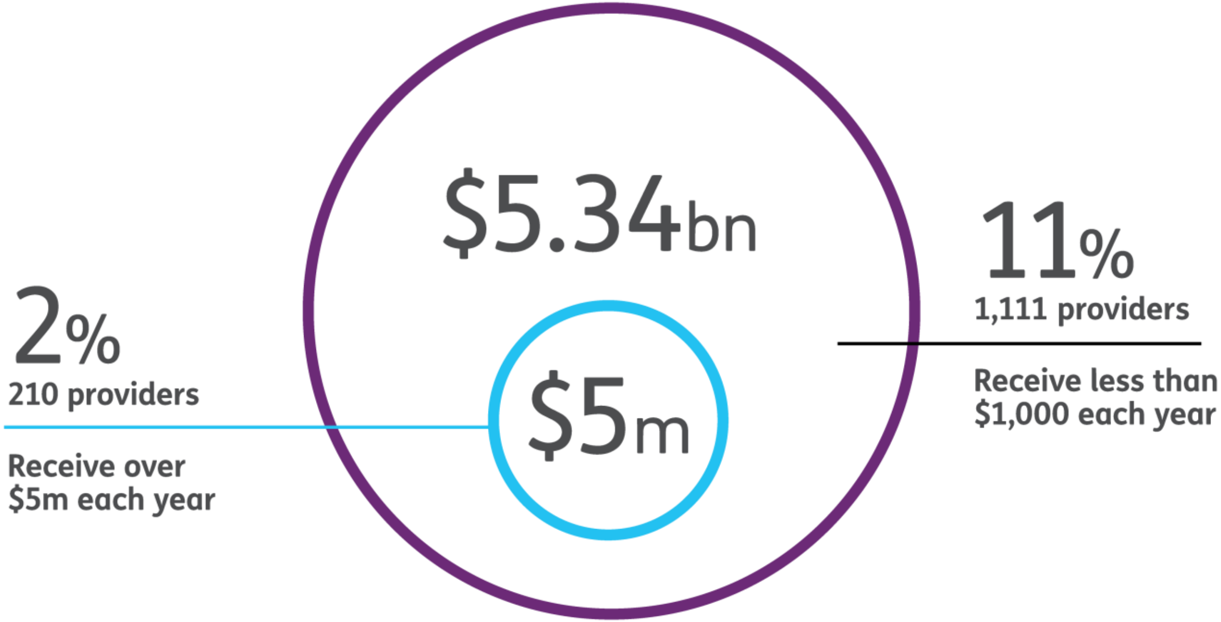
Increase in payments each quarter

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

	2017 – 2018 Q3	2017 – 2018 Q4	2018 – 2019 Q1	2018 – 2019 Q2
National	$995.4m	$1,181.4m 19% increase	$1,499.8m 27% increase	$1,665.6m 11% increase
Queensland	$110.6m	$134.5m 22% increase	$176.2m 31% increase	$230.5m 31% increase

Source: *Provider Growth Dashboard, as at 31 March 2019: Market Insights, pg.3 and 12*

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	Capacity building	Capital supports
$4.20bn	$932m	$206m

Source: *Provider Growth Dashboard as at 31 March 2018: Payment Profile, pg. 2*

Market growth

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

National

11%

Queensland

31%

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

National

53%

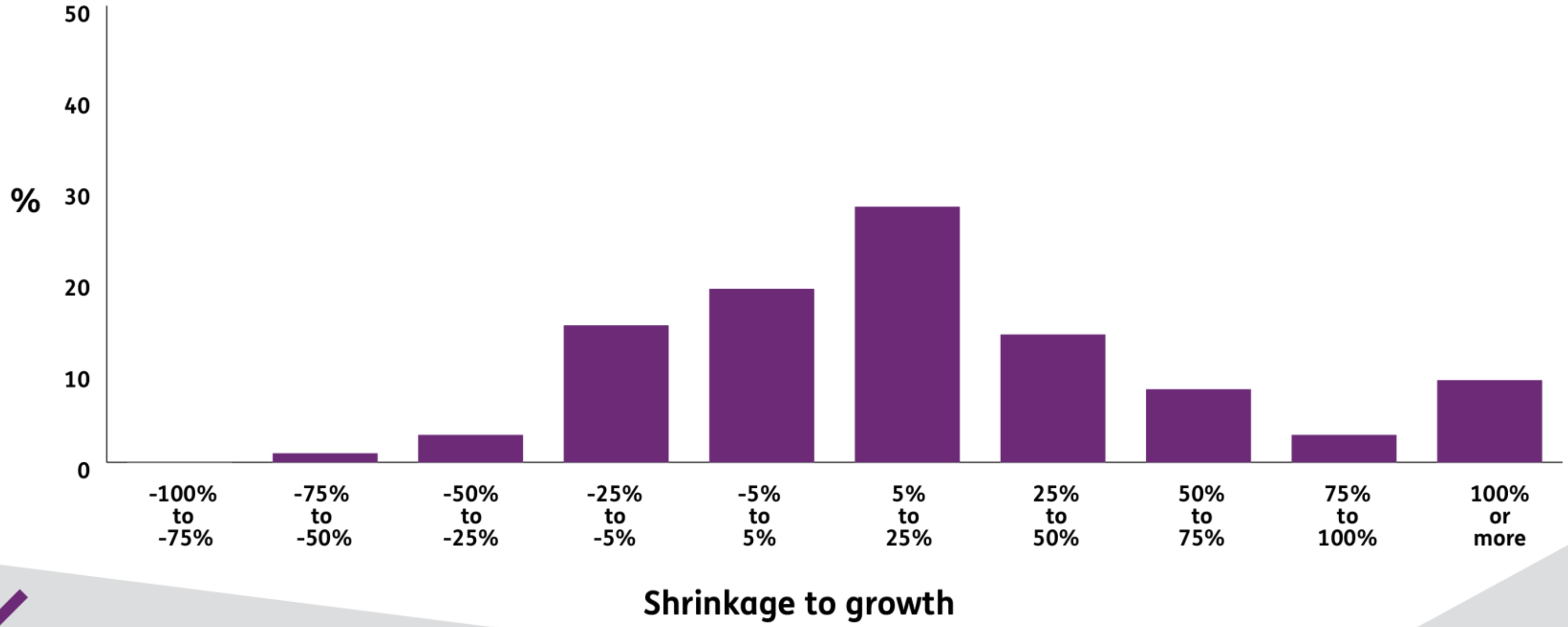
Queensland

57%

Source: *Provider Growth Dashboard as at 31 March 2018: Payment Profile, pg. 2*

Large provider growth / shrinkage – Queensland

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



Source: *Provider Growth Dashboard as at 31 March 2018: Payment Profile, pg. 12*

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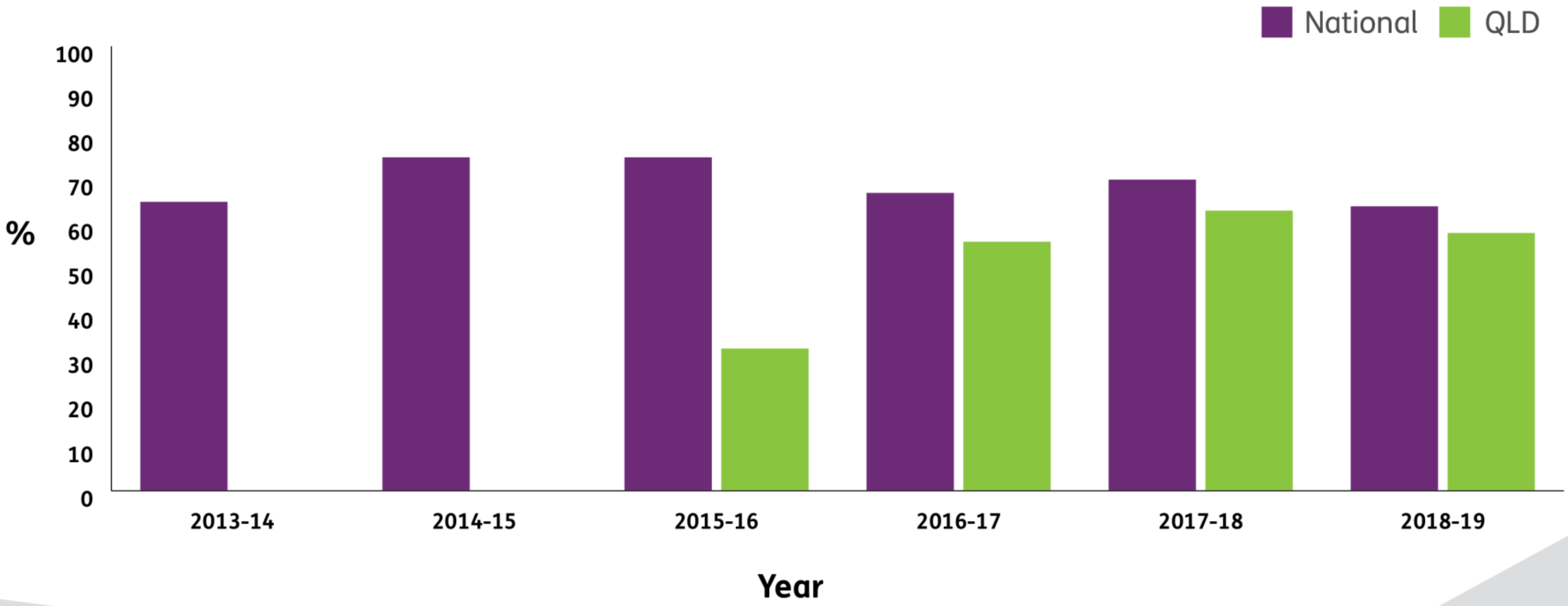
Utilisation

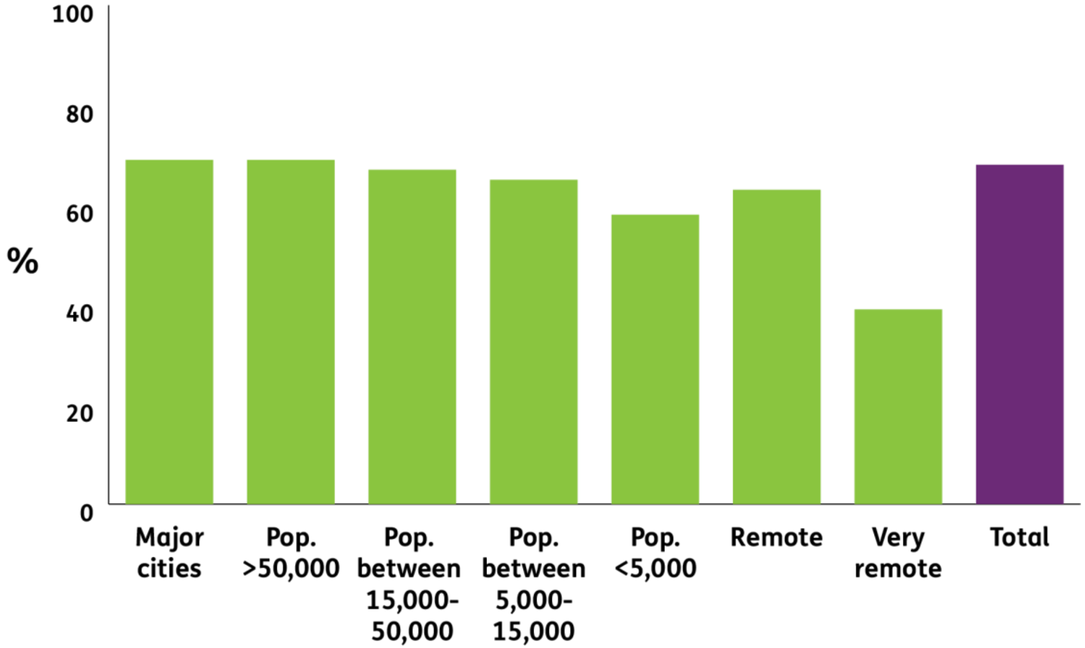
Utilisation of committed supports



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

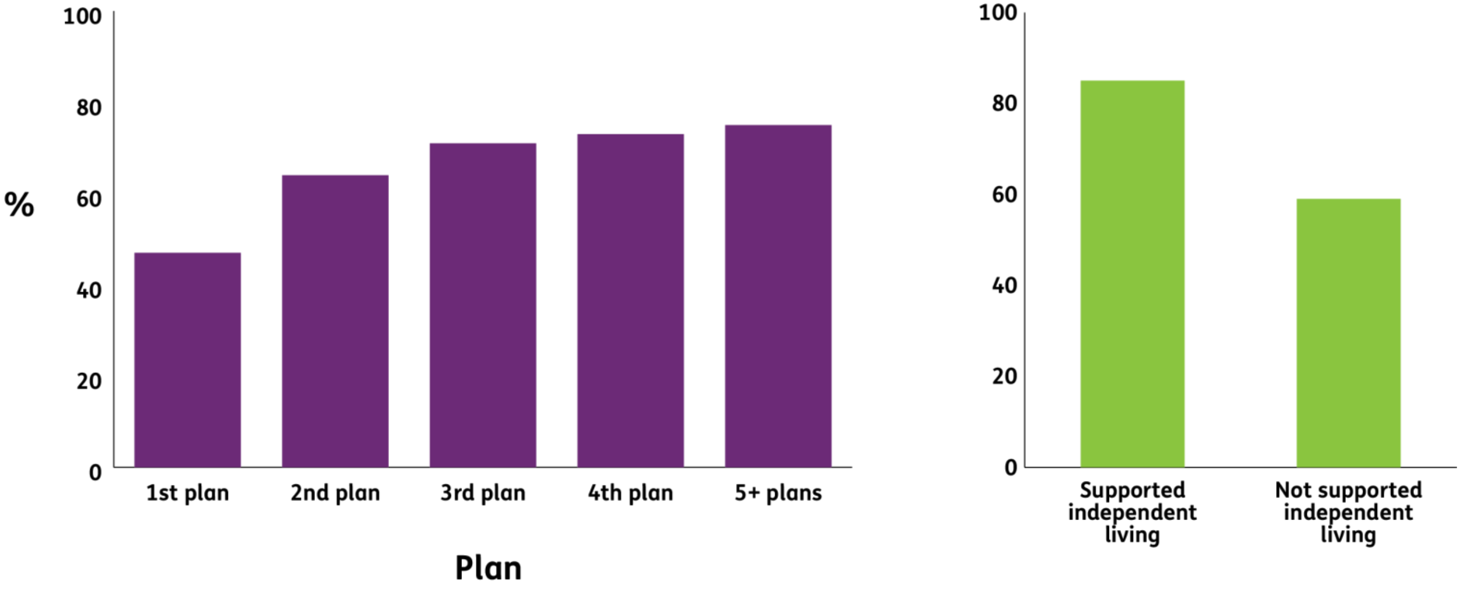
COAG Disability Reform Council Quarterly Performance Report – National – 30 June 2019, pg. 31

Utilisation of supports by location



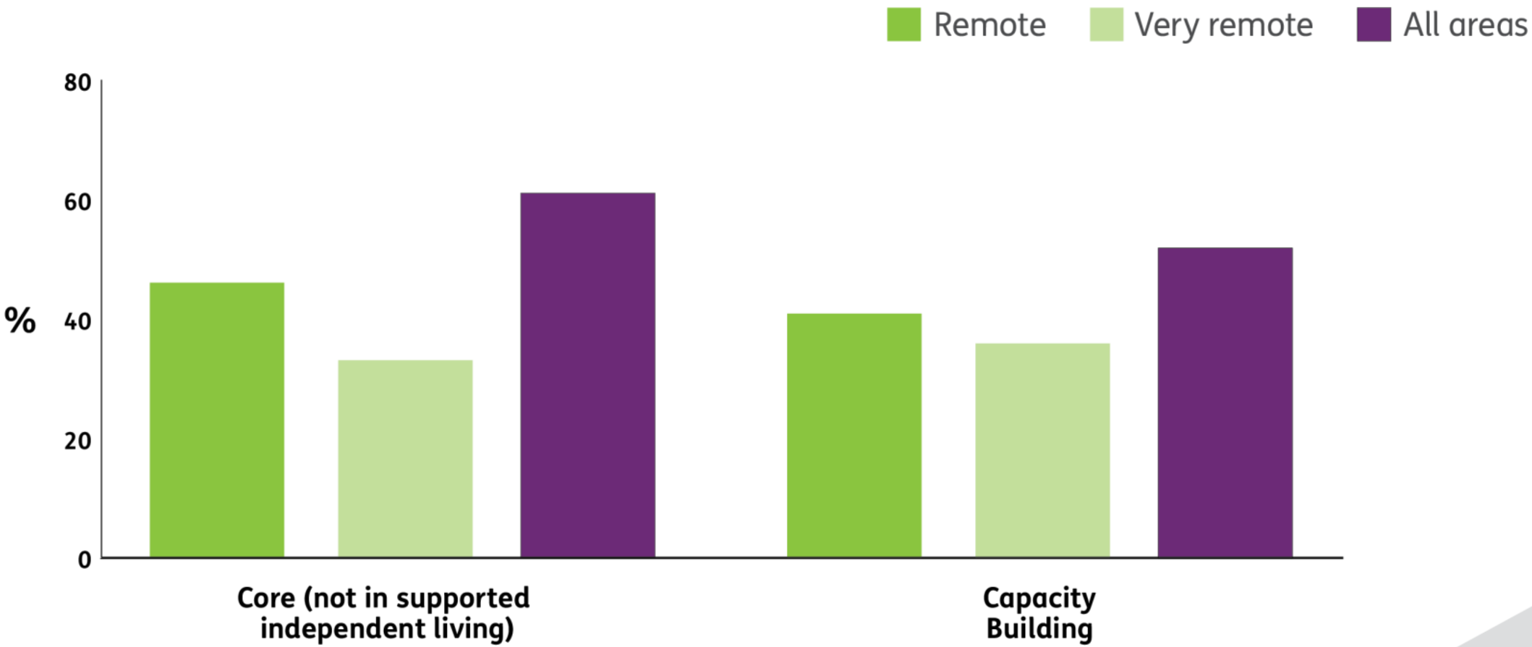
Source: *COAG Disability Reform Council Quarterly Report June 2019, pg. 39*

Utilisation of supports by plan number / with or without SIL



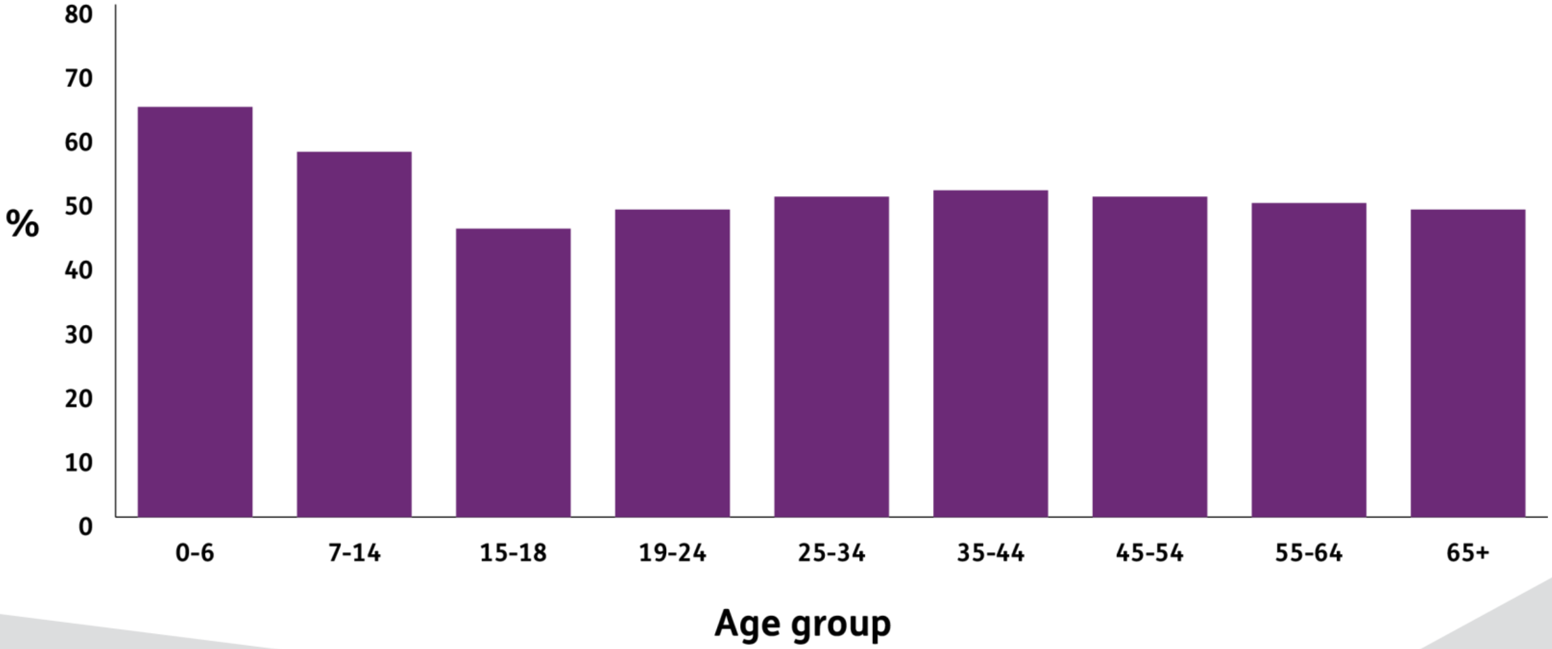
Source: *COAG Disability Reform Council Quarterly Report June 2019, pg. 38 and 39*

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*

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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

Queensland 37%

64%

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

Queensland 67%

67%

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

Queensland 72%

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

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