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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
- Different geographies, business types, support categories

Size of the market

At March 31 2019:

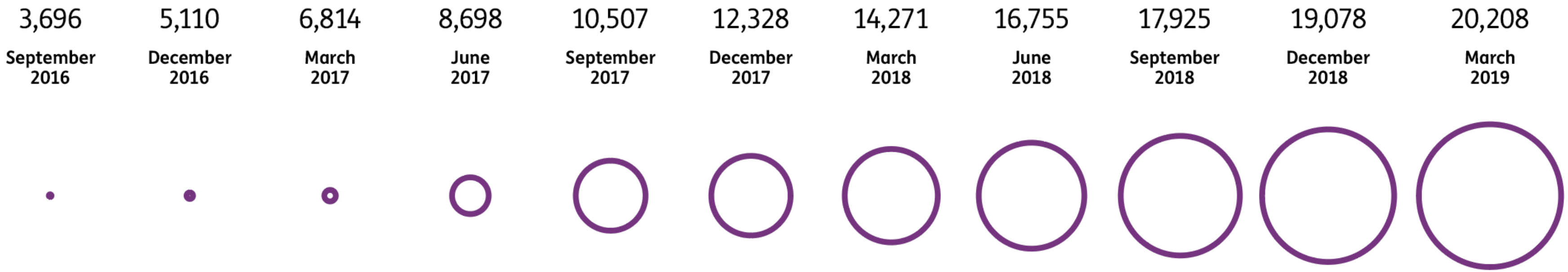
20,208 registered providers

11,418 active providers (57%)

14% market growth

Source: *COAG Quarterly Report March 2019, pg. 43*

Registered provider growth in the last 5 years



Source: *COAG Quarterly Report March 2019, Fig. 26, pg. 44*

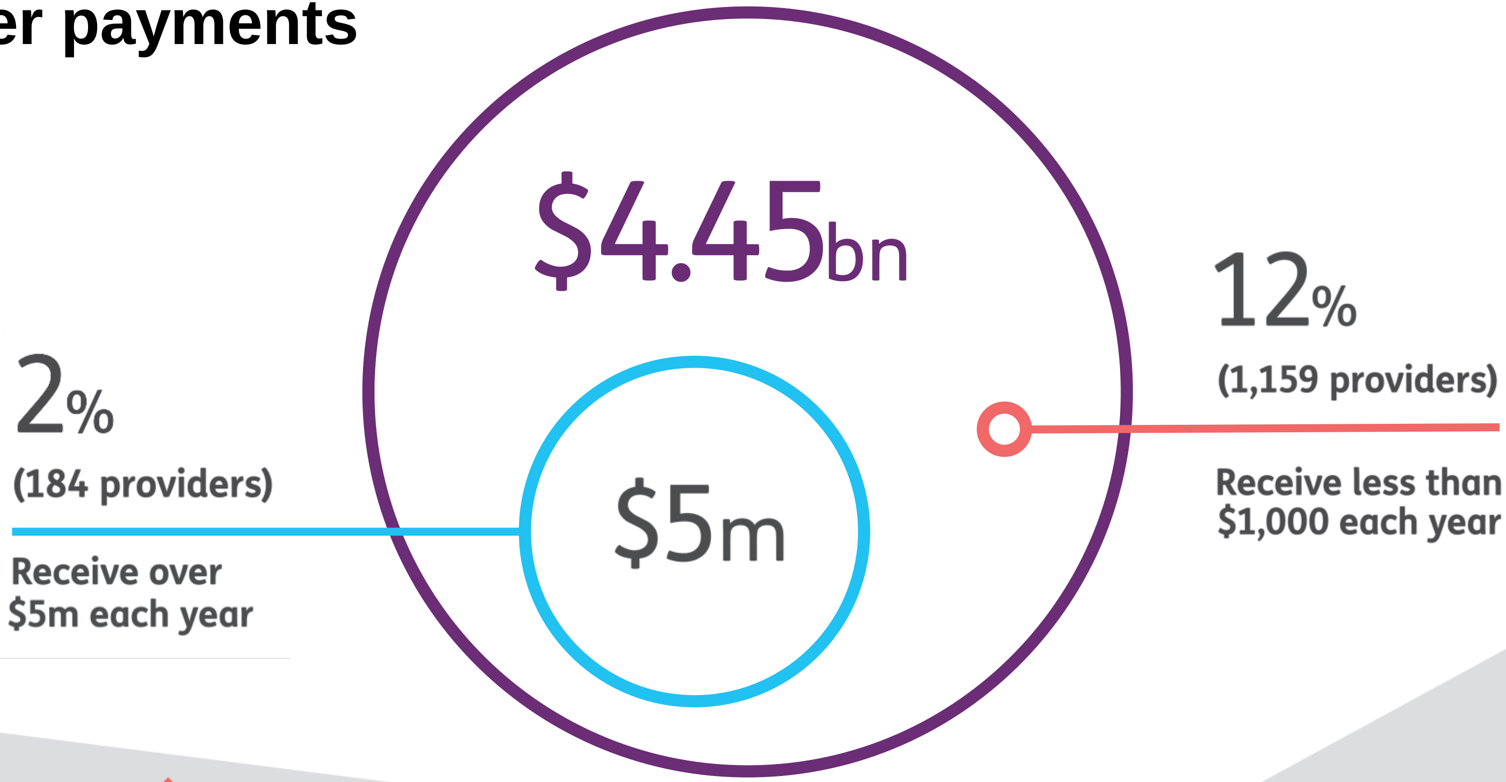
Value of the market

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

$4.45bn

Source: *Service Provider Dashboard, as at 31 December 2018, Provider Growth Dashboard: distribution of registered providers by annual payments, pg. 1*

Distribution of registered provider payments



Source: *Service Provider Dashboard, as at 31 December 2018, Provider Growth Dashboard: distribution of registered providers by annual payments, pg. 1*

How this breaks down

Support category values

Largest:

Daily living activities

54.4% $2.42bn

Social and civic

22.7% $1.01bn

Smallest:

Lifelong learning

0.002% $100,000

Home and living

0.01% $400,000

Source: *Service Provider Dashboard, as at 31 December 2018, Provider Growth Dashboard: annual payments claimed by registered providers by support category, pg. 1*

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Support categories and service types

Support categories

1 **Core supports** – enable participants to complete activities of daily living

2 **Capacity building supports** – enable participants to build their independence and skills

3 **Capital supports** – are investments, such as assistive technologies – equipment, home or vehicle modifications, or for Specialist Disability Accommodation (SDA)

Core support providers

Daily living activities

3,309
providers

7,384
participants

29% market growth ($)

Social and civic

2,126
providers

72,676
participants

22% market growth ($)

Source: *Provider Growth Dashboard as at 31 December 2018: Payment profile*

Core support providers

Consumables

1,268
providers

30,163
participants

22% market growth ($)

Transport

679
providers

6,762
participants

21% market growth ($)

Source: *Provider Growth Dashboard as at 31 December 2018: Payment profile*

Core support providers: Assistance services

Accommodation / tenancy assistance	**2,067**
Assistance animals	**20**
Assistance with daily life tasks (group or supported living arrangement)	**1,359**
Assistance with travel / transport arrangements	**3,994**
Daily personal activities	**1,978**
Group and centre based activities	**1,755**
High intensity daily personal activities	**1,698**
Household tasks	**5,381**
Interpreting and translation	**954**
Participation in social, community and civic activities	**2,276**

Source: *Provider Growth Dashboard as at 31 December 2018: Number of registered providers by registration groups*

Capacity building support areas

Choice and control

Employment

Health and wellbeing

Lifelong learning

Daily activities

Relationships

Social and civic

Home and living

Support coordination

Capacity building support providers

Daily living activities

6,303
providers

106,901
participants

20% market growth ($)

Lifelong learning

30
providers

43
participants

9% market growth ($)

Employment

586
providers

15,644
participants

7% market growth ($)

Source: *Provider Growth Dashboard as at 31 December 2018: Payment profile*

Capacity building support providers

Relationships

998
providers

10,400
participants

21% market growth ($)

Support coordination

1,422
providers

62,885
participants

17% market growth ($)

Social and civic

1,247
providers

9,318
participants

15% market growth ($)

Source: *Provider Growth Dashboard as at 31 December 2018: Payment profile*

Capacity building support providers

Health and wellbeing

982
providers

4,724
participants

22% market growth ($)

Home and living

141
providers

354
participants

8% market growth ($)

Choice and control

738
providers

35,082
participants

40% market growth ($)

Source: *Provider Growth Dashboard as at 31 December 2018: Payment profile*

Capacity building support providers

Assistance in coordinating or managing life stages, transitions and supports	2,043
Behaviour support	1,909
Community nursing care for high needs	1,674
Development of daily living and life skills	2,082
Early intervention supports for early childhood	3,051
Exercise Physiology and Physical wellbeing activities	2,234
Innovative community participation	2,997
Specialised driving training	599
Therapeutic supports	9,247

Source: *Provider Growth Dashboard as at 31 December 2018: Number of registered providers by registration groups*

Capital support providers

Assistive technology

1,540
providers

21,687
participants

15% market growth ($) ▲

Home modifications

450
providers

4,943
participants

9% market decrease ($) ▼

Source: *Provider Growth Dashboard as at 31 December 2018: Payment profile*

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Recent market activity

Recent market activity

Main growth areas in the latest quarter across **all providers**:

Therapeutic supports

8,993 ▶ 9,636

7% increase

Household tasks

5,283 ▶ 5,883

11% increase

Assistance with travel/ transport arrangements

3,912 ▶ 4,334

11% increase

Innovative community participation

2,925 ▶ 3,328

14% increase

Source: *COAG Quarterly Report March 2019, pg. 43*

Recent market activity

Highest level of growth in the last quarter in the following **registration groups**:

Special disability accommodation

118 ▸ 140

19% ▲ increase

Innovative community participation

314 ▸ 361

15% ▲ increase

Exercise physiology and physical wellbeing activities

653 ▸ 743

14% ▲ increase

Source: *COAG Quarterly Report March 2019, pg. 43*

Snapshot:
Specialist Disability Accommodation

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

12,356
participants with SDA in their plan

13% increase since last quarter

Source: *COAG Quarterly Report March 2019, pg. 43*

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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

42% in Q4 2017-18

64%

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

68% in Q4 2017-18

67%

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

71% in Q4 2017-18

Source: *Provider Sentiment and Satisfaction Survey March 2019*

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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