



The NDIS Market

31 December 2019

National Disability Insurance Agency

ndis

Outline



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01.

Introduction

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 achieve their goals. Participants receive individual budgets from which they choose the providers to support them.

On 30 September 2019, the NDIA released a report on the NDIS market (using 30 June 2019 data – “the June report”). The aim of this report was to support the purpose of the NDIS by comparing 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. This report provides an update to this previous report using data at 31 December 2019.

As at 31 December 2019, the Scheme had just under 340,000 active participants with approved plans, residing across eighty bilateral regions¹. This report provides detailed information on 76 of these regions as NDIS service delivery commenced in these areas on or before 1st January 2019. This compares with the June report where 64 regions were included in the analysis (as only 64 regions as the NDIS had only been operating for at least a year at 30 June 2019).

¹ Bilateral agreements were signed between the Commonwealth government and the States and Territories; these agreements detailed the Scheme phase-in dates of the 80 regions, which are based on combinations of Local Government Areas (LGAs).

Active participants, plan budgets and payments over time

The number of participants, plan budgets and payments has grown rapidly since scheme inception. This growth is expected to continue until the scheme reaches maturity, supporting an estimated 500,000 Australians in three to four years time.

	Trial years	2016-17	2017-18	2018-19	2019-20 YTD*
Active participants	29,719	89,610	172,333	286,015	338,982
Total committed (\$m)	1,568.5	3,234.5	7,740.4	14,585.7	11,090.9
Total paid (\$m)	1,161.0	2,183.2	5,420.2	10,205.2	6,944.1
% utilised to date	74%	67%	70%	70%	

* There is a lag between when support is provided and when it is paid – hence, payments will increase

Payments by support category



The level of payments vary between support categories, with the largest three being Core – Daily Activities, Core – Community and Capacity Building – Daily Activities

Support category	Trial years	2016-17	2017-18	2018-19	2019-2020 YTD*	2019-2020 % YTD
Core - Transport	25.3	101.3	245.3	421.0	280.4	4%
Core - Daily Activities	443.3	1,332.1	3,143.2	5,803.0	3,807.7	55%
Core - Consumables	8.5	13.2	58.0	134.4	105.7	2%
Core - Community	184.2	312.4	919.6	1,820.3	1,274.1	18%
Capital - Home Modifications	7.2	17.4	48.5	84.9	62.5	1%
Capital - Assistive Technology	46.2	44.5	163.0	275.7	233.3	3%
Capacity Building - Support Coordination	24.6	56.1	138.5	236.3	167.1	2%
Capacity Building - Social and Civic	8.5	19.3	28.5	49.1	34.6	0%
Capacity Building - Relationships	7.3	8.1	28.4	69.4	48.0	1%
Capacity Building - Lifelong Learning	0.7	0.1	0.1	0.1	0.1	0%
Capacity Building - Home Living	0.8	0.6	0.4	0.6	0.3	0%
Capacity Building - Health and Wellbeing	4.9	2.7	7.6	19.6	13.8	0%
Capacity Building - Employment	17.6	38.3	128.6	203.3	109.1	2%
Capacity Building - Daily Activities	157.8	194.3	451.8	936.2	735.7	11%
Capacity Building - Choice and Control	1.5	5.5	23.3	77.0	66.4	1%
Other	222.6	37.4	35.3	74.1	5.3	0%
Total	1,161.0	2,183.2	5,420.2	10,205.2	6,944.1	4%

Key indicators for monitoring the NDIS market

The NDIA corporate plan 2019-2023 lists four performance indicators for Aspiration Two – a competitive market with innovative supports. Specifically the indicators are on:

- Choice and control
- Provider sentiment and confidence
- Plan utilisation
- Market concentration

This document includes a deep dive into three of these metrics (choice and control, plan utilisation, and market concentration).

Note that details on the benchmarks for each indicator are set out in Appendix B of the Market Report Appendices (which can be downloaded as a separate presentation on the NDIS website).

Key indicators for monitoring the NDIS market

Plan utilisation

For support provided between 1 April 2019 and 30 September 2019, 69% had been utilised nationally, based on data at 31 December 2019¹. Experience in other Schemes with individual budgets (internationally and in Australia) indicates that plan utilisation is unlikely to be 100% - however, it should be higher than current levels. Some of the reasons for plans being under-utilised include:

- More support was provided informally through family, friends and community
- Supports being put in plans “just in case” they are required
- Participants needing more support to implement their plans
- Providers needing more support to claim for supports provided
- Supports being unavailable in the market.

Combinations of the above factors are likely to be driving the lower than expected utilisation. Recognising that utilisation is lower than expected, significant insights can still be drawn by understanding how utilisation differs from this national average (“the benchmark”) across bilateral regions, participant cohorts, and support categories. In order to compare regions, the two biggest drivers of utilisation are accounted for in the national benchmark to allow like-for-like comparisons – these are:

- Whether or not a participant is in supported independent living (SIL) – with participants in SIL utilising more of their plan compared with those not in SIL (85% compared with 61%)
- The amount of time the participant has been in the Scheme – the longer the participant is in the Scheme the more they utilise their plan (53% for participants on their first plans compared with 78% for participants on their fifth plan).

Regions more than ten percentage points below or above the national benchmark indicate possible thin markets and markets that are doing relatively better than other regions. Some regions that differ substantially from the benchmark are analysed in more detail in this document, including looking at participant characteristics and support categories within the region.

¹ This allows for a three month lag between when support was provided and when it had been paid. Utilisation will increase as more payments for this support period are made.

Key indicators for monitoring the NDIS market

Market concentration

Understanding the distribution of payments to service providers in a region can indicate whether a small number of providers receive most of the payments from the NDIA, or whether a large number of providers are receiving the payments. The provider concentration metric is defined as the proportion of total provider payments made to the top ten providers that received the most payments in the exposure period.

A low provider concentration means that there is less risk in terms of the importance of a particular provider or group of providers to a region and a high provider concentration might suggest that there is insufficient competition in a region, and that further investment could be of benefit. Regions that have recently phased into the Scheme tend to have high concentration levels as providers are likely to still be entering the market.

Where only a small number of providers are receiving a large amount of the payments, the market is considered to be more concentrated and could mean that there is less competition in the region. On average across regions, 61% of payments go to the largest ten providers. In this analysis, some regions where more than 85% of payments are going to the ten largest providers are considered in detail, including by looking at participant characteristics and service categories.

Key indicators for monitoring the NDIS market

Choice and control

The NDIS outcomes framework survey includes two indicators on choice and control which are analysed in depth in this document – capturing the following:

- % of participants who choose who supports them; and
- % of participants who say the NDIS has helped with choice and control.

The outcomes indicator on choice and control has been calculated as the proportion of participants that reported that they choose who supports them. The indicator has been determined for each region and measured against a national benchmark that takes account of differences in the response rate arising from whether a participant receives SIL supports.

- Nationally, 50% of participants aged 15 years and over indicated that they choose who supports them, and 68% indicated that the NDIS has helped with choice and control.
- Over time, it is expected that these percentages will increase – however, understanding how different regions, participant cohorts, and support categories differ from this national average (“the benchmark”) provides insight into potential hot spots where investment might be required to better support participants.

- In particular, where regions are more than ten percentage points below or above this benchmark indicates possible thin markets and markets that are doing relatively better than other regions. Some regions that differ substantially from the benchmark are analysed in more detail in this document, including looking at participant characteristics and support categories within the region.

Summary of indicators across market segments

The key indicators have been calculated over the period from 1 April 2019 to 30 September 2019, using data available as at 31 December 2019, and 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

On the dashboards (which can be downloaded from the NDIA Market report website), the indicators are presented both including and excluding participants in supported independent living (SIL).

Key indicators¹

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 NDIA helps with choice and control

¹ Full definitions of each indicator, including the period over which they are measured, are provided in Appendix A of the June 2019 NDIS Market report.

² The benchmark represents the national average, and for some indicators, is adjusted for the mix of participants within the market being analysed.

Each of the bilateral regions has been allocated into one of three categories (based on size of total plan budgets) to allow for a fairer comparison of the indicators across regions

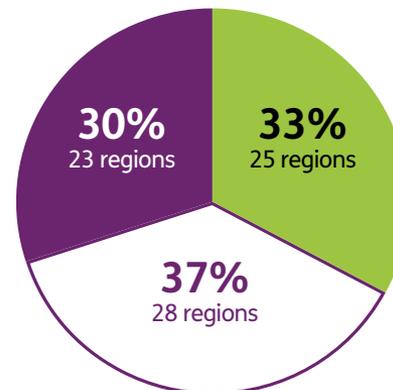
Prior analysis indicates that key indicators at the bilateral region level may be correlated to the size of the particular bilateral region (for example, provider concentration was generally higher for smaller regions).

To mitigate this effect, each bilateral region has been allocated into one of three categories for comparison against other regions of similar size. The categories have been defined by the value of total plan budgets over the period from 1 April 2019 to 30 September 2019¹. The three categories are:

- Less than \$50m in total plan budgets
- \$50m to \$150m in total plan budgets
- Greater than \$150m in total plan budgets

The chart on the right shows the number and proportion of bilateral regions that have been allocated to each category.

Allocation of bilateral regions



■ < \$50m in total plan budgets

■ \$50m to \$150m

□ > \$150m

¹ Note that in the June 2019 report, the category thresholds were \$25m and \$100m. Over time regions grow as more participants enter the Scheme, so necessitating a periodic redefinition of the total plan budget categories.

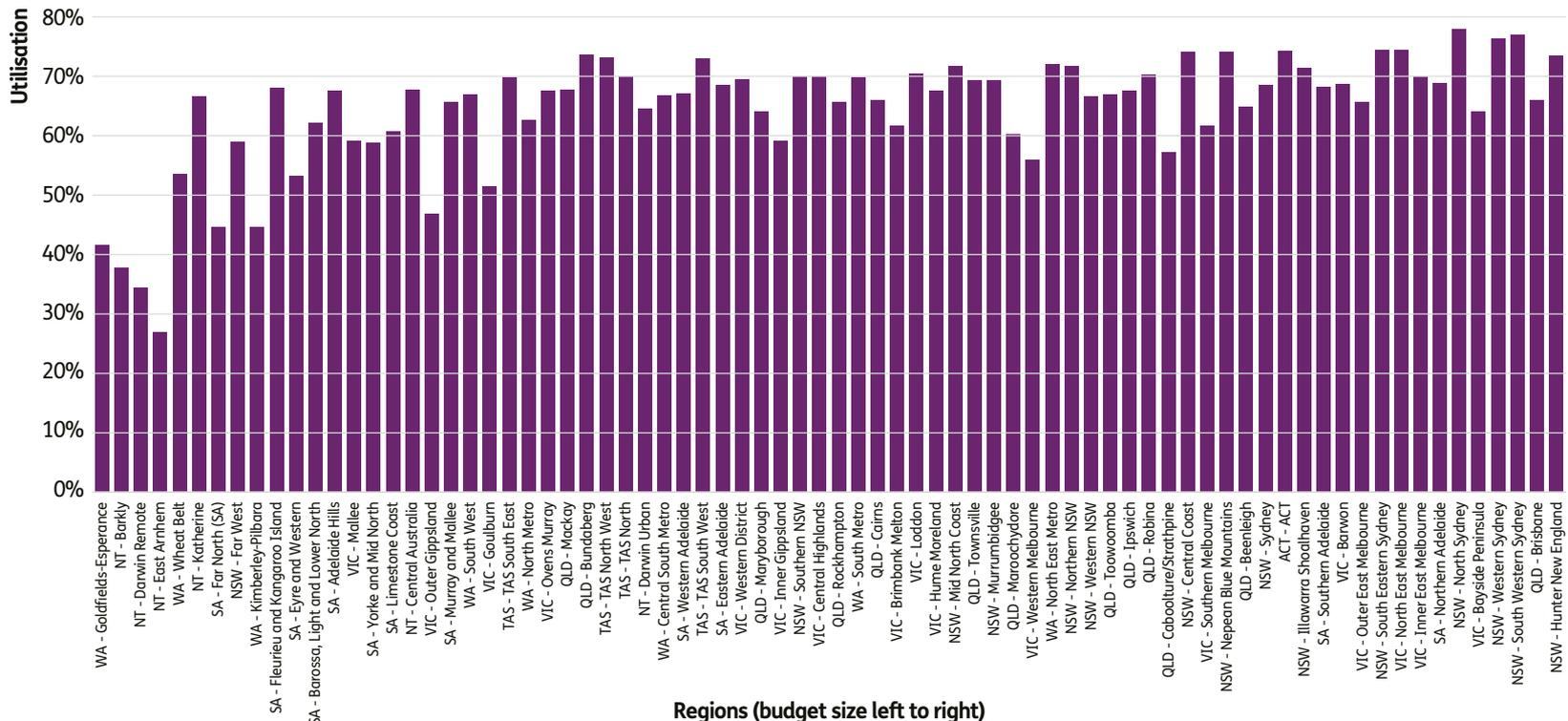
02.

Key insights

covering the period from April 2019
to September 2019.

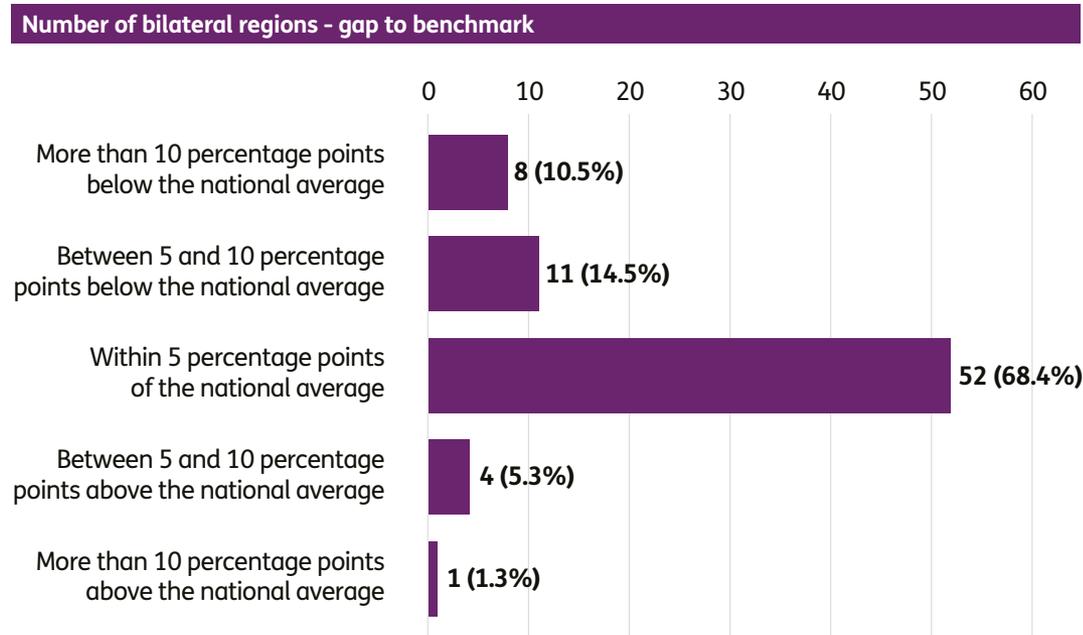
Analysis of utilisation against the regions ordered by budget size indicates some positive correlation

Ordering regions by budget size indicates that larger regions tend to have higher utilisation rates (see chart below).



The correlation coefficient is 0.49. A correlation coefficient above zero indicates that there is a positive relationship between size and utilisation rates – i.e. as budget size increases, so do utilisation rates for a region. The size of the co-efficient (between zero and one) indicates the strength of the relationship. A coefficient of 0.49 indicates a relationship, but the relationship is not overly strong.

Plan utilisation for nine bilateral regions was more than 10% below the benchmark



The chart on the left shows the distribution of the gap between the plan utilisation indicator¹ and the benchmark², for each bilateral region³.

The benchmark² represents the national average, adjusted for the mix of participants receiving SIL supports and the number of plans each participant has received.

As the chart shows, one region had a utilisation rate that was 10% or greater than their benchmark, whereas eight regions had a utilisation rate more than 10% lower than their benchmark.

¹ Calculated over the period from 1 April 2019 to 30 September 2019, using data available as at 31 December 2019

² Further detail on benchmarks is provided in Appendix B

³ The bilateral regions considered have had at least twelve months of Scheme experience, i.e. commenced phasing before 1 January 2019. This equates to 76 of the 80 bilateral regions.

The majority of regions more than 5% below the national average benchmark are in NT or SA

Between 5 and 10 percentage points below national average					
Region	State /Territory	Utilisation	Benchmark	Active participants	Annualised plan budget (\$m)
Far West	NSW	59%	66%	466	\$35
Goulburn	VIC	51%	57%	2,451	\$133
Inner Gippsland	VIC	59%	66%	3,623	\$201
Barossa, Light and Lower North	SA	62%	67%	1,541	\$71
Limestone Coast	SA	61%	71%	1,033	\$72
Murray and Mallee	SA	66%	71%	1,285	\$84
Yorke and Mid North	SA	59%	66%	1,311	\$67
Central Australia	NT	68%	76%	406	\$87
Darwin Urban	NT	64%	73%	1,613	\$189
Katherine	NT	67%	76%	148	\$26
Wheat Belt	WA	54%	59%	647	\$34

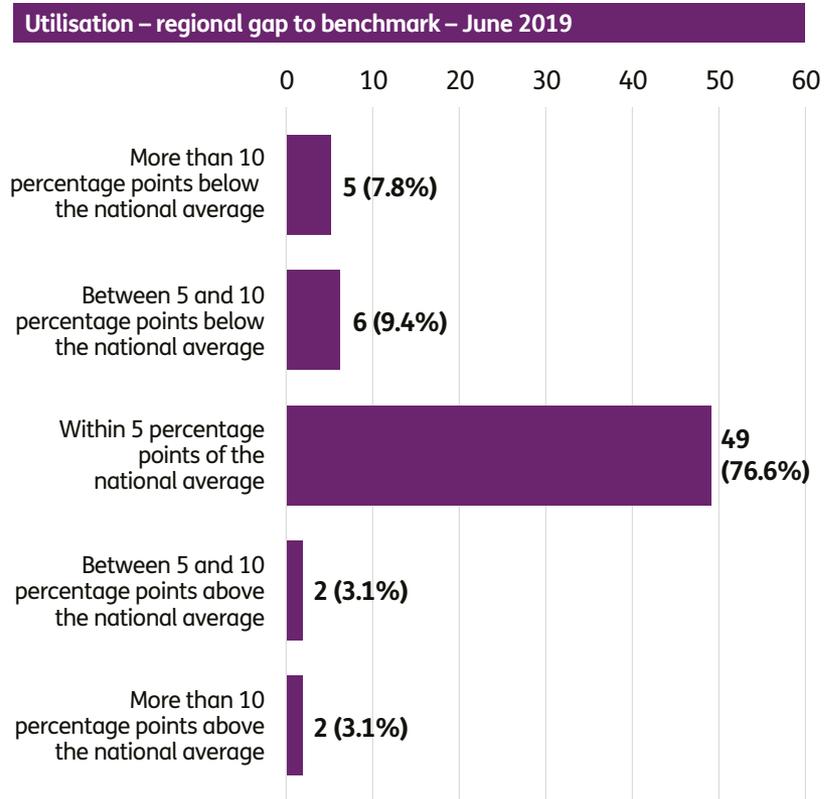
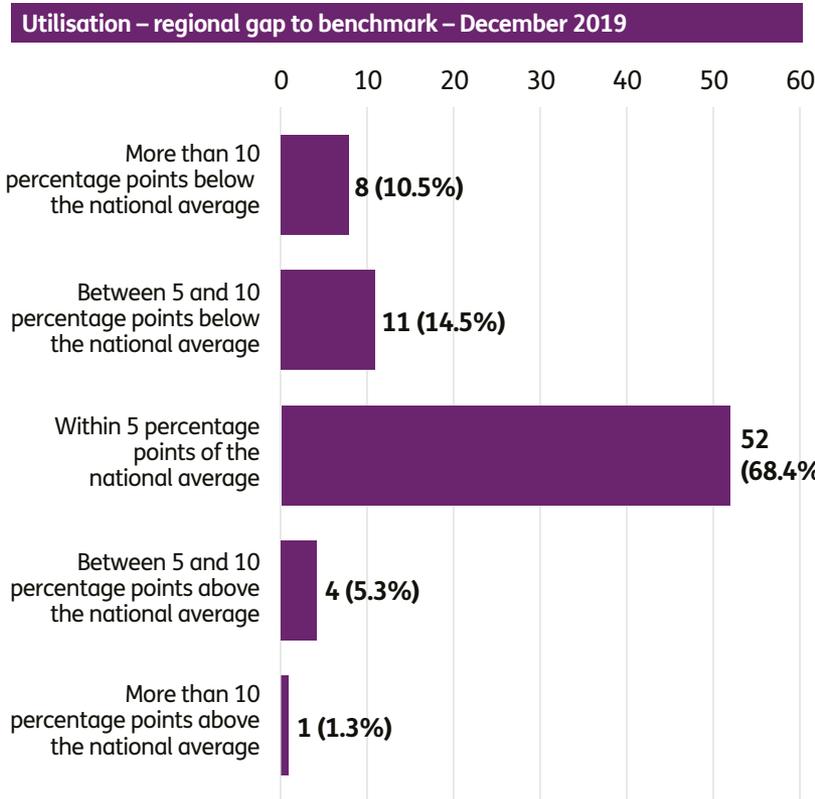
- ‘National average’ on this context refers to the benchmark used for that region – which is the national average utilisation rate adjusted to reflect SIL category and plan number profile of the region in question.
- The table above lists the regions that were between five and ten percentage points below the national average.
- As the table shows, three of the eleven regions are in the Northern Territory and four are in South Australia.
- Eight of the eleven regions have less than \$100m in total plan budgets (annualised).

The majority of regions more than 5% below the national average benchmark are in NT or SA (cont.)

More than 10 percentage points below national average					
Region	State /Territory	Utilisation	Benchmark	Active participants	Annualised plan budget (\$m)
Outer Gippsland	VIC	47%	58%	1,473	\$92
Eyre and Western	SA	53%	65%	945	\$64
Far North (SA)	SA	45%	69%	354	\$27
Barkly	NT	38%	75%	151	\$18
Darwin Remote	NT	34%	61%	277	\$25
East Arnhem	NT	27%	65%	161	\$19
Kimberley-Pilbara	WA	45%	56%	831	\$62
Goldfields-Esperance	WA	42%	53%	370	\$22

- ‘National average’ on this context refers to the benchmark used for that region – which is the national average utilisation rate adjusted to reflect SIL category and plan number profile of the region in question.
- The table above lists the regions that were more than ten percentage points below the national average.
- As the table shows, three of the eight regions are in the Northern Territory and two are in South Australia.
- All eight of the regions have less than \$100m in total plan budgets (annualised).

The number of regions with an overall utilisation rate more than 10% below national average has increased between June 2019 and December 2019 (from five to eight)



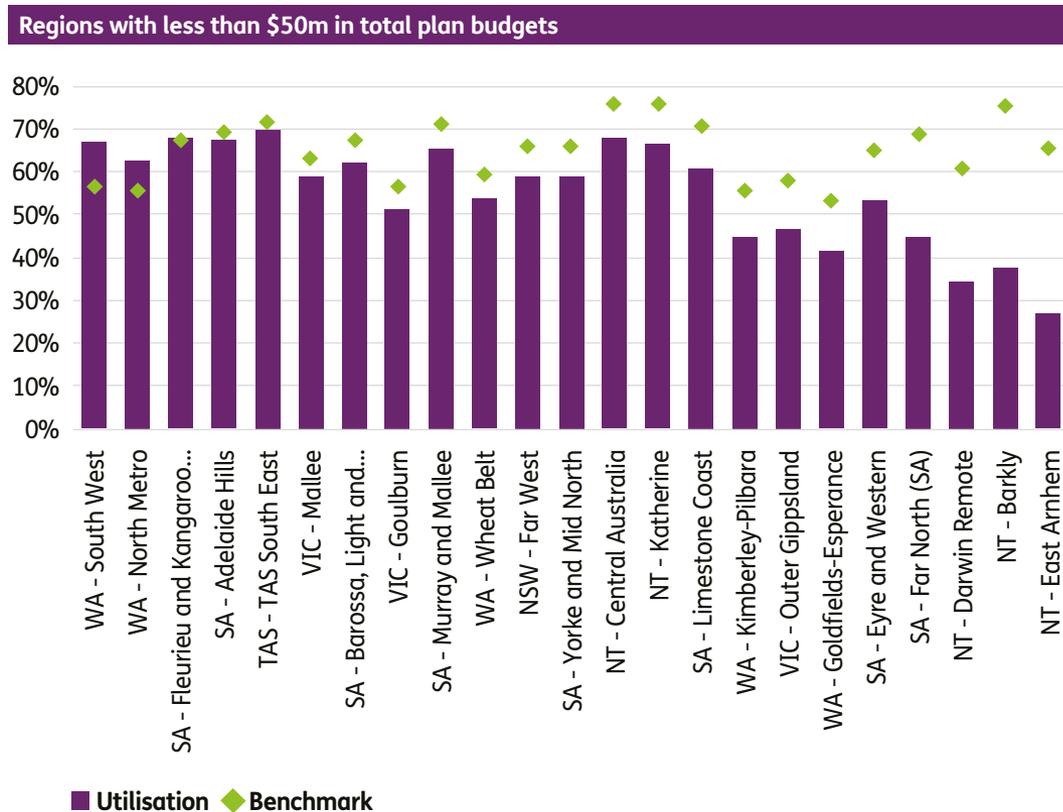
Overall utilisation rates have risen across Australia



National utilisation rate has risen from 66% to 69% between end June 2019 and end December 2019 and the benchmark charts (preceding slide) show that regions are shifting to higher levels of utilisation relative to benchmark.

- As shown in the charts on the preceding slide, at the end of June 2019, there were 39 regions (out of 64) that were below their benchmark. At the end of December 2019, this has increased to 49 (out of 76).
- The increase from five to eight of the regions more than 10% below benchmark is driven by the addition of three regions that were not in the analysis before (Outer Gippsland (VIC), Kimberley-Pilbara (WA) and Goldfields-Esperance (WA)). In addition Eyre and Western (SA) moved into the category and Murray and Mallee (SA) moved out.
- The number of regions between 5% and 10% below benchmark has increased from six to eleven. One of the regions (Goulburn (VIC)) is a new addition to the analysis. The remaining four region increase is the net result of Eyre and Western (SA) moving to more than 10% below benchmark and Murray and Mallee (SA), Yorke and Mid North (SA), Darwin Urban (NT), Katherine (NT) and Wheat Belt (WA) moving into the category.
- When looking at the regions above the benchmark, there has been an increase – from four to five - in the number of regions with a utilisation rate greater than 5% above the benchmark, again this was driven by the addition of a new region to the analysis (South-West) than a general shift in utilisation relative to benchmark.

19 of 23 small regions were below the utilisation benchmark, the majority of which are in NT and SA

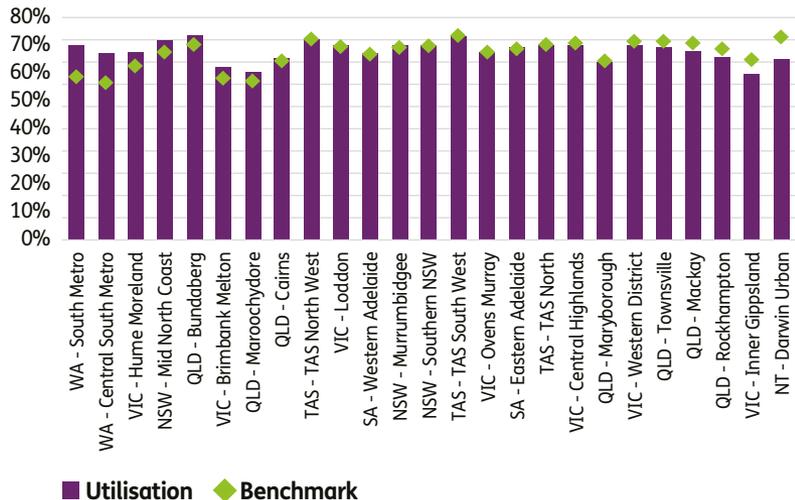


The chart on the left shows plan utilisation for each of the bilateral regions that had less than \$50m in total plan budgets for the period. The South-West (WA) region had a utilisation rate more than 10% above the benchmark.

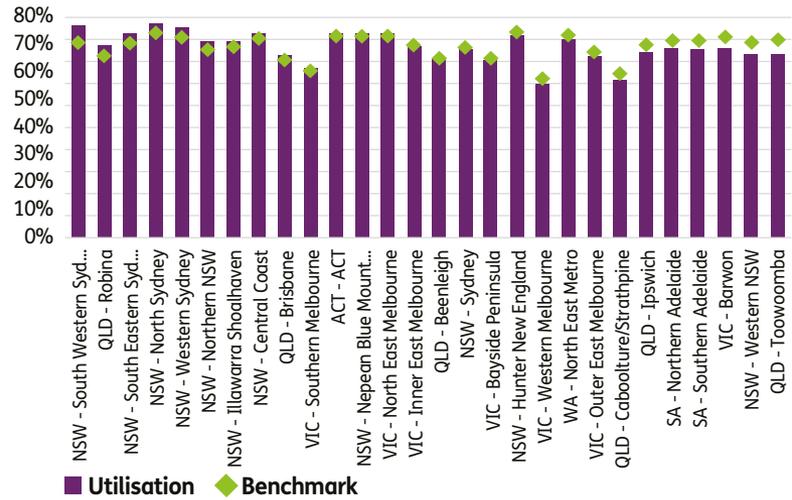
The table on slide 17 lists the eight regions that are more than 10% below the benchmark.

Plan utilisation for all regions with total plan budgets greater than \$50m were within ten percentage points of the benchmark

Utilisation – regional gap to benchmark – December 2019



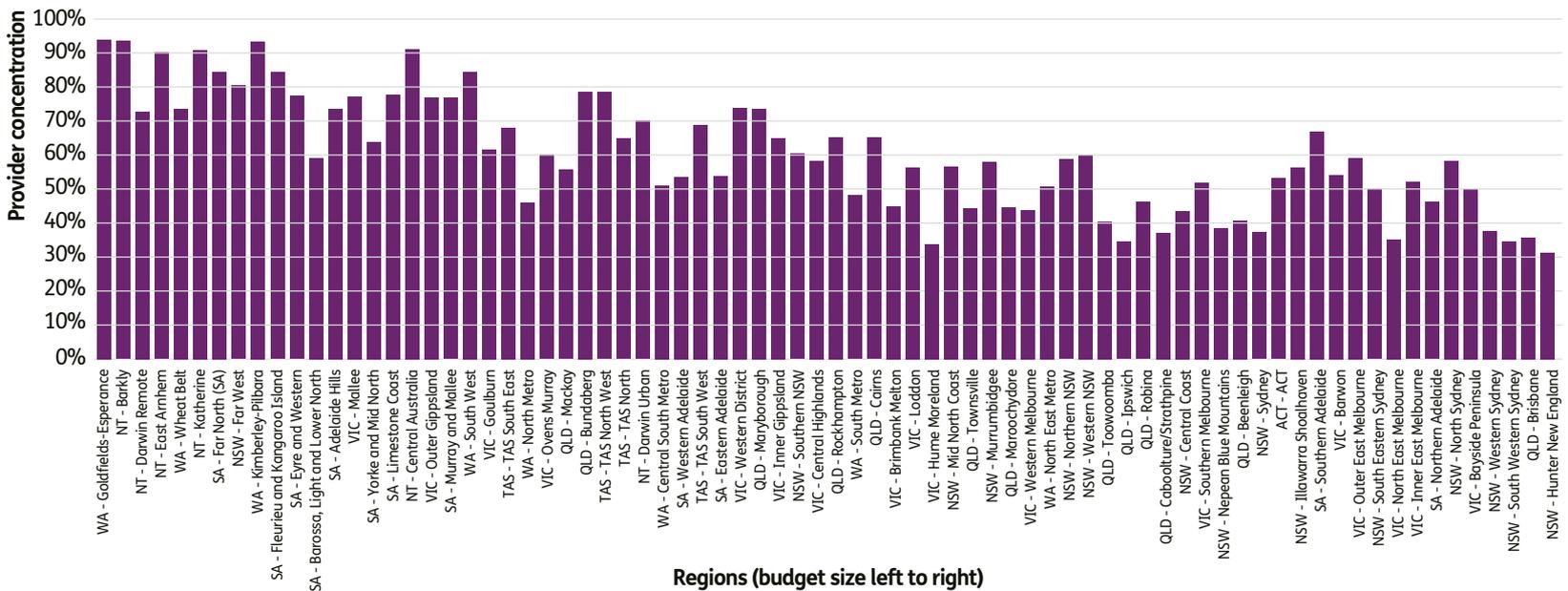
Utilisation – regional gap to benchmark – June 2019



- The above charts show plan utilisation for each of the bilateral regions that had \$50m to \$150m and greater than \$150m in total plan budgets for the period. None of these regions had plan utilisation of more than 10% below the benchmark or more than 10% above the benchmark.
- For regions with \$50m to \$100m in total plan budgets, South Metro in Western Australia showed the highest utilisation above benchmark (utilisation rate of 70%, benchmark of 61%) and Darwin Urban in Northern Territory showed the lowest utilisation below benchmark (utilisation rate of 64%, benchmark of 73%).
- For regions with greater than \$150m in total plan budgets, South Western Sydney in New South Wales showed the highest utilisation above benchmark (utilisation rate of 77%, benchmark of 71%) and Toowoomba in Queensland showed the lowest utilisation below benchmark (utilisation rate of 67%, benchmark of 72%).

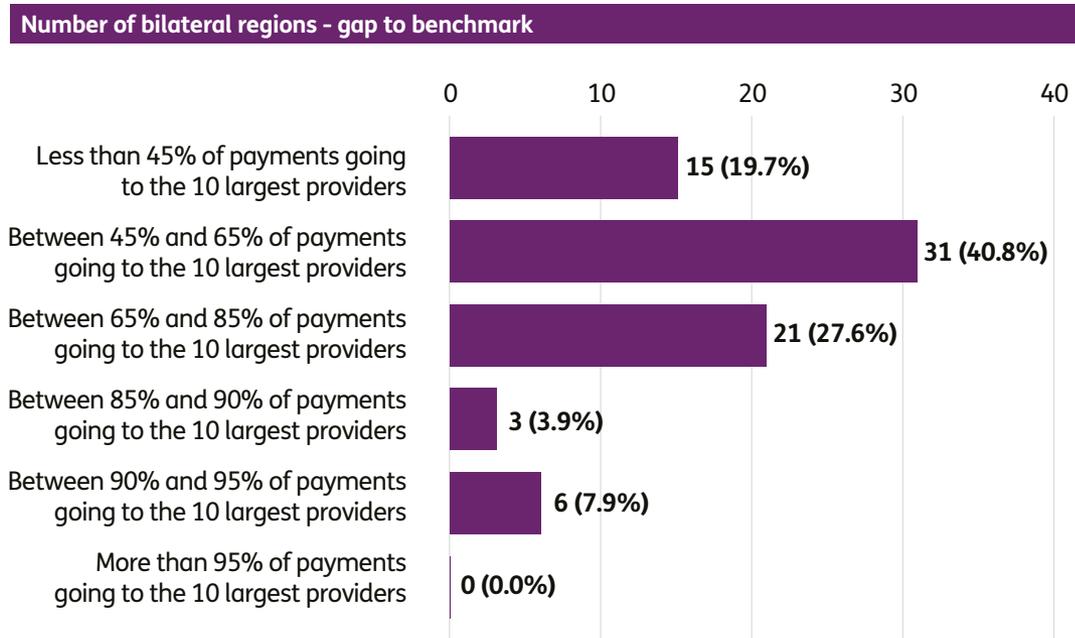
Provider concentration tends to fall as total budget increases

Ordering regions by budget size indicates that larger regions have lower provider concentration (see chart below). Regions with large budgets are likely to be populous regions (e.g. urban areas) and these tend to have a larger number of providers.



The correlation coefficient is -0.71. A correlation coefficient below zero indicates that there is a negative relationship between size and provider concentration – i.e. as budget size increases, provider concentration decreases. The size of the co-efficient (between zero and one) indicates the strength of the relationship. A coefficient of -0.71 indicates a moderately strong relationship.

Provider concentration was above the benchmark of 85% for nine bilateral regions, all with total plan budgets below \$50m



The chart on the left shows the number of bilateral regions that have provider concentration¹ above or below the benchmark, as well as the size of the gap. The benchmark² has been set at 85% for all regions.

Overall, nine out of 76³ regions (12%) were above the benchmark.

15 out of 76 regions (20%) were more than 40% below the benchmark.

¹ Calculated over the period from 1 April 2019 to 30 September 2019, using data available as at 31 December 2019

² Further detail on benchmarks is provided in Appendix B

³ The bilateral regions considered have had at least twelve months of Scheme experience, i.e. commenced phasing before 1 January 2019. This equates to 76 of the 80 bilateral regions.

The majority of regions above the provider concentration benchmark were in NT and WA.

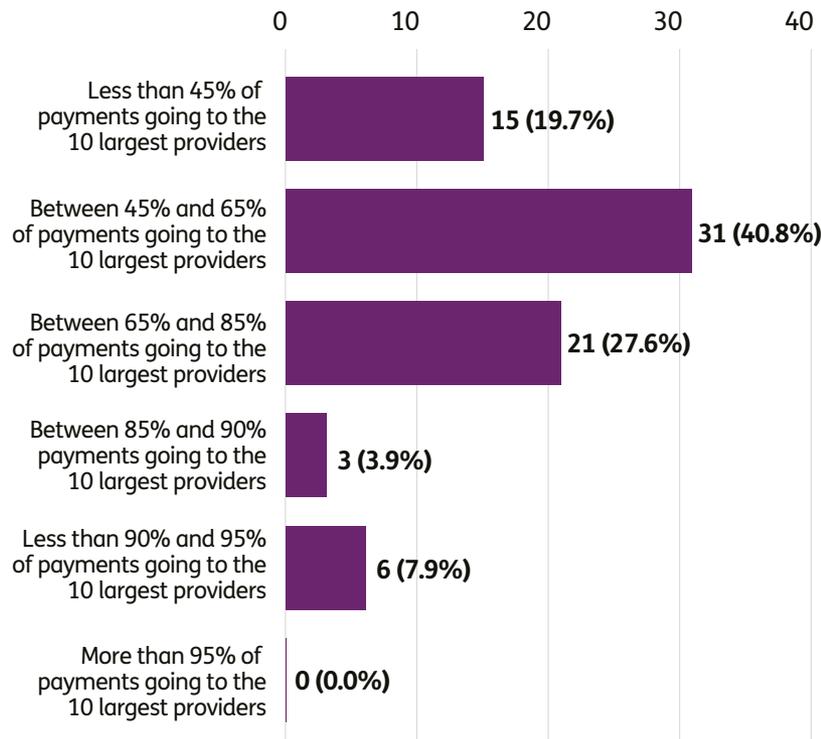
Between 90% to 95% of payments going to the 10 largest providers					
Region	State /Territory	Provider concentration	Benchmark	Active participants	Annualised plan budget (\$m)
Barkly	NT	94%	85%	151	\$18
Central Australia	NT	92%	85%	406	\$87
East Arnhem	NT	91%	85%	161	\$19
Katherine	NT	92%	85%	148	\$26
Kimberley-Pilbara	WA	94%	85%	831	\$62
Goldfields-Esperance	WA	95%	85%	370	\$22

Between 85% to 90% of payments going to the 10 largest providers					
Region	State /Territory	Provider concentration	Benchmark	Active participants	Annualised plan budget (\$m)
Far North (SA)	SA	85%	85%	354	\$27
Fleurieu and Kangaroo Island	SA	85%	85%	858	\$58
South West	WA	85%	85%	2267	\$117

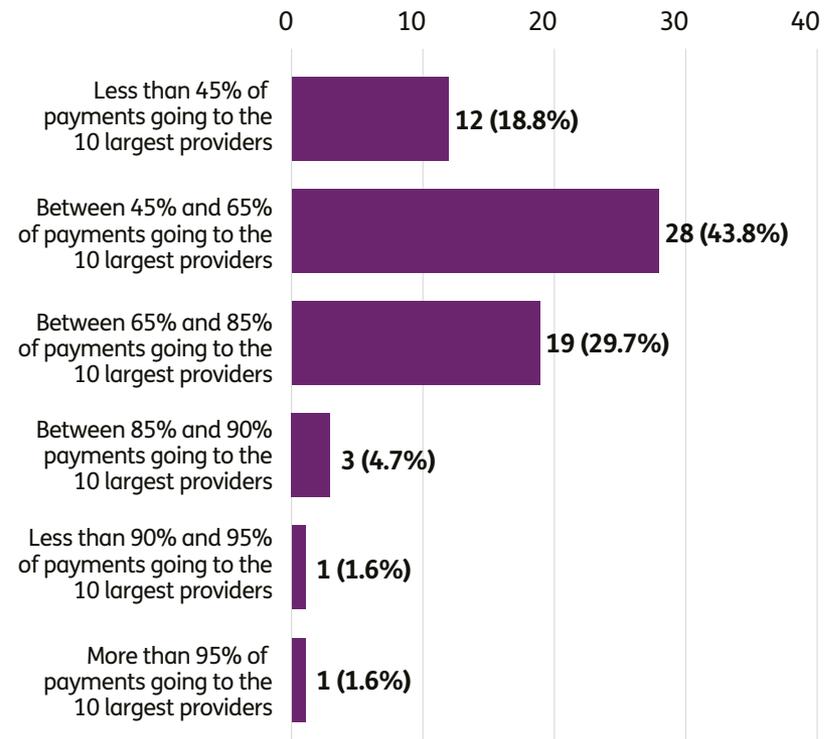
- The table above lists the regions that were above the provider concentration benchmark.
- As the table shows, four of the nine regions are in the Northern Territory and three are in Western Australia.
- Eight of the nine regions have less than \$100m in total plan budgets (annualised).

The number of regions that are 5% to 10% higher than the benchmark has risen from one to six between the end of June 2019 and the end of December 2019

Provider concentration – regional gap to benchmark – December 2019



Provider concentration – regional gap to benchmark – June 2019

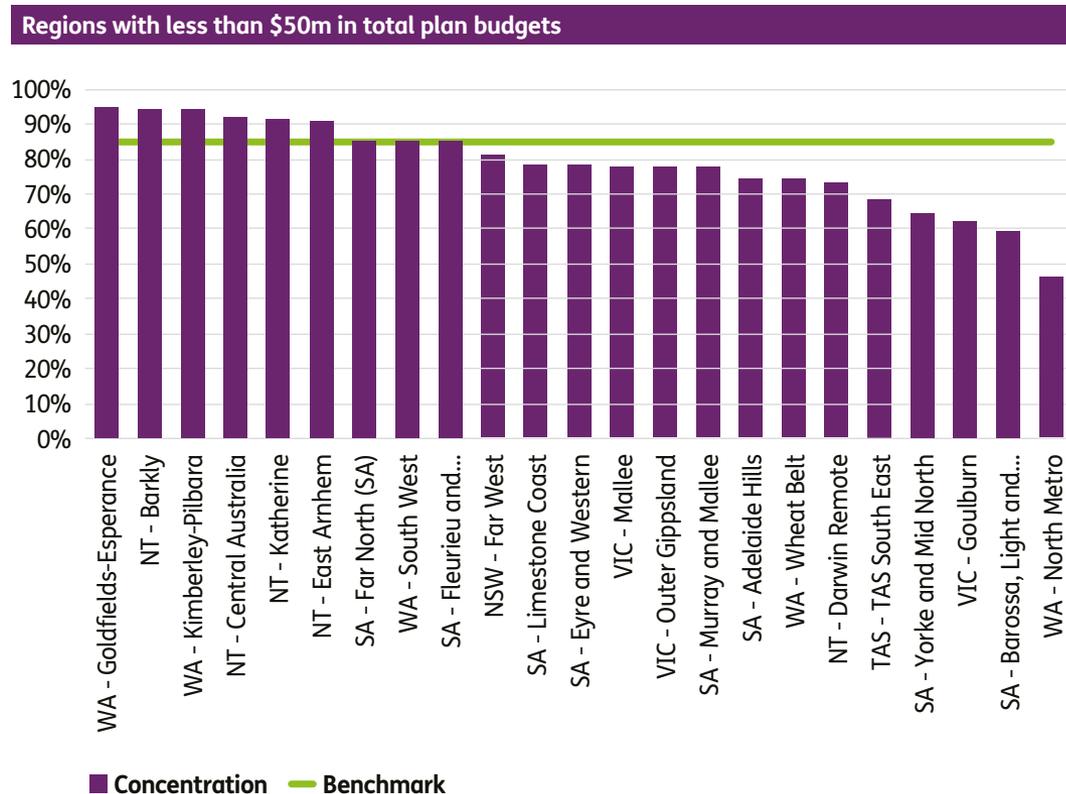


Provider concentration has moved little since June 2019

The average level of provider concentration across regions in Australia has fallen from 63% to 61%. Overall this indicates a slight improvement since the June 2019 NDIS Market Report.

- As shown on the charts on the preceding slide, the number of regions above the benchmark (85% of provider payments made to the top ten providers that received the most payments in the exposure period) has risen from five (out of 64) to nine (out of 76).
- Three of the regions (Kimberley-Pilbara (WA), South West (WA) and Goldfields-Esperance (WA)) were not covered in the June report. Looking at the 64 regions that are covered in both reports, the number of regions above the benchmark has increased by one (Fleurieu and Kangaroo Island (SA)).
- The number of regions below the benchmark has increased from 59 (out of 64) to 67 (out of 76).
- The proportion of the overall split (between '65% to 85%', '45% to 65%' and 'below 45%' of payments goes to top ten providers) has not significantly changed since June.
- Overall the results indicate that market concentration has decreased slightly on average, but increased in some areas.

All the regions above the provider concentration benchmark had less than \$50m in total plan budgets



The chart on the left provides further insight into each bilateral region with less than \$50m in total plan budgets over the period.

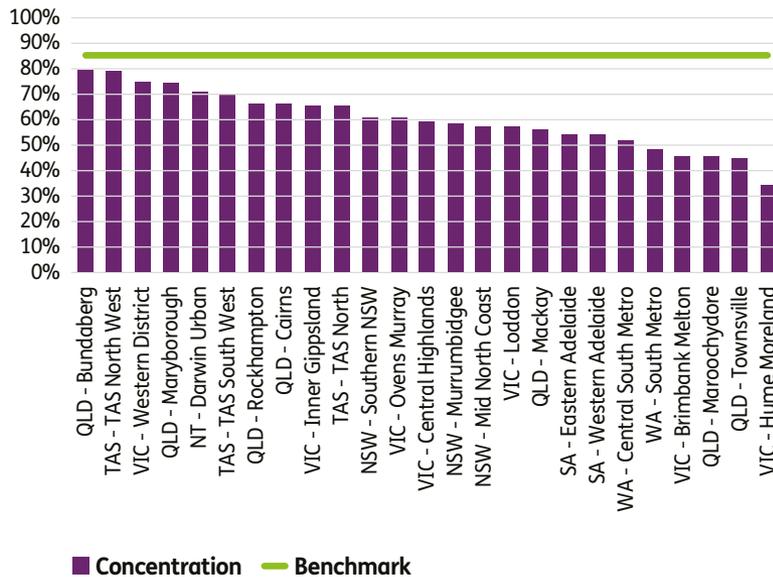
Note that Barkly (NT) was the only region more than ten percentage points above the benchmark in the June 2019 NDIS Markets report and was covered in greater detail in that report. As this region is no longer greater than ten percentage points higher than the benchmark, it is not analysed in detail in this report for this metric.

In addition, Central Australia (NT) was also covered in the June report as the region with the next highest provider concentration after Barkly (NT).

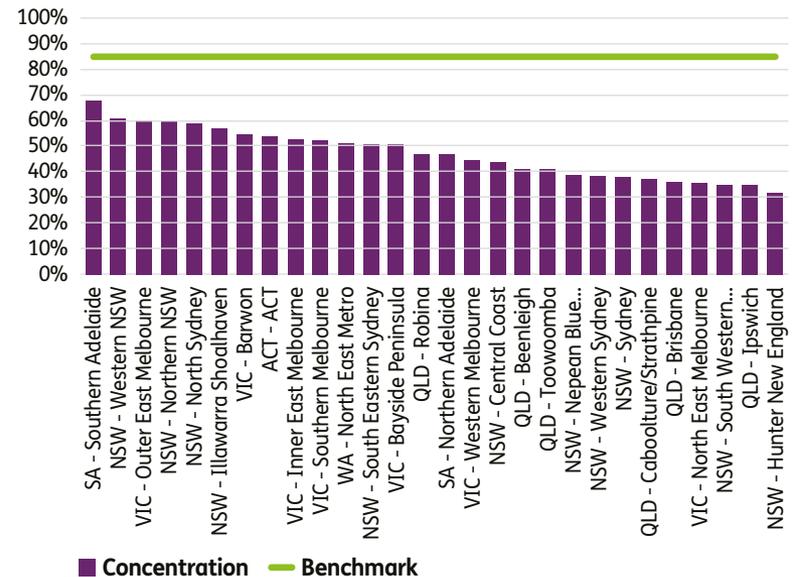
Goldfields-Esperance (WA) and Kimberley-Pilbara (WA) are covered in more detail later in the 'Regional Hotspots' section of this presentation.

All regions with more than \$50m in total plan budgets had provider concentration below the benchmark

Regions with \$50m to \$150m in total plan budgets



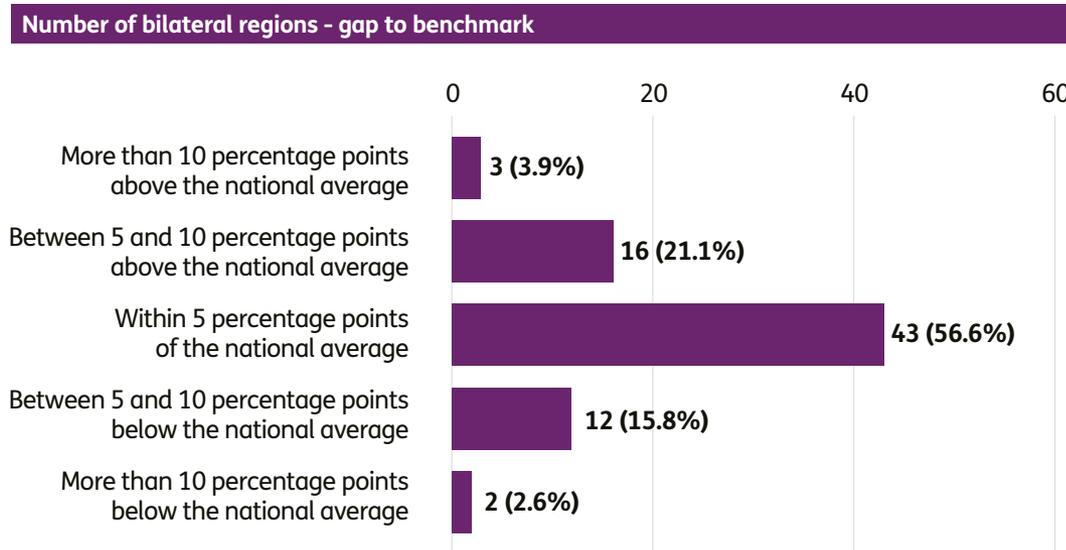
Regions with greater than \$150m in total plan budgets



- While almost all of the regions display levels of provider concentration below the benchmark, there are still markets where investment could be beneficial. Comparison of the two charts also shows that provider concentration tends to be greater in the smaller regions.
- Note that South Western Sydney (NSW) and Brisbane (QLD) were both covered in the June report as examples of regions with low provider concentration.

The outcomes indicator on choice and control for two regions was more than 10% below the benchmark

The analysis shows that the proportion of participants that reported that they do not choose who supports them was more than 10% below the benchmark for two regions.



The chart on the left shows the distribution of the gap between the outcomes indicator on choice and control¹ and the benchmark², for each bilateral region. The benchmark² represents the national average, adjusted for the mix of SIL participants.

The indicator in respect of two regions³ was more than 10% below the benchmark: Katherine (NT) and East Arnhem (NT).

The indicator for three regions was more than 10% above the benchmark: ACT (ACT), Barkly (NT) and TAS South West (TAS).

¹ Calculated as at 31 March 2019, using data available as at 30 June 2019.

² Further detail on benchmarks is provided in Appendix B.

³ The bilateral regions considered have had at least twelve months of Scheme experience, i.e. commenced phasing on or before 1 January 2019. This equates to 76 of the 80 bilateral regions.

The majority of regions below the outcomes indicator benchmark were in NT and Sydney

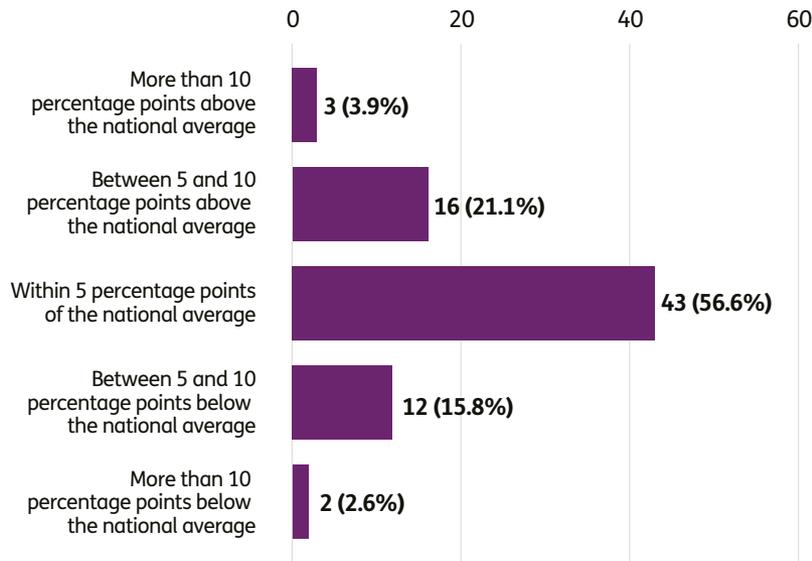
More than 10 percentage points below benchmark					
Region	State /Territory	Outcomes indicator	Benchmark	Active participants	Annualised plan budget (\$m)
East Arnhem	NT	42%	55%	161	\$19
Katherine	NT	24%	44%	148	\$26

Between 5 and 10 percentage points below benchmark					
Region	State /Territory	Outcomes indicator	Benchmark	Active participants	Annualised plan budget (\$m)
North Sydney	NSW	43%	48%	8,089	\$645
South Eastern Sydney	NSW	41%	50%	7,480	\$495
South Western Sydney	NSW	42%	50%	15,077	\$842
Sydney	NSW	42%	51%	6,270	\$415
Western Sydney	NSW	43%	49%	12,833	\$801
Inner East Melbourne	VIC	41%	48%	7,103	\$557
Far North (SA)	SA	43%	49%	354	\$27
TAS South East	TAS	41%	48%	1,563	\$108
Central Australia	NT	32%	42%	406	\$87
Darwin Remote	NT	45%	55%	277	\$25
Goldfields-Esperance	WA	46%	54%	370	\$22
North Metro	WA	45%	53%	2,839	\$156

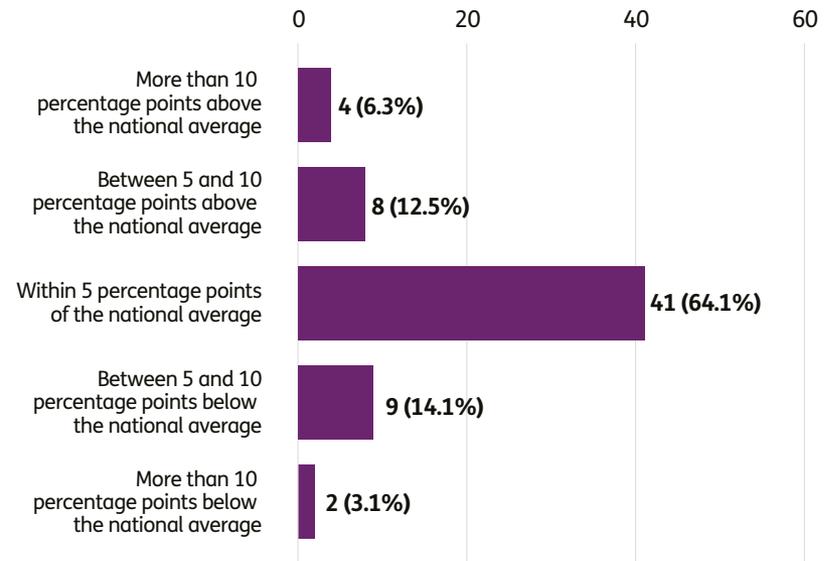
- The table above lists the regions that were above the outcomes indicator benchmark.
- As the table shows, four of the 14 regions are in the Northern Territory and five are regions of Sydney in New South Wales.

The number of regions that are below the benchmark has risen from 26 to 33 between June 2019 and December 2019

Outcomes indicator – regional gap to benchmark – December 2019



Outcomes indicator – regional gap to benchmark – June 2019

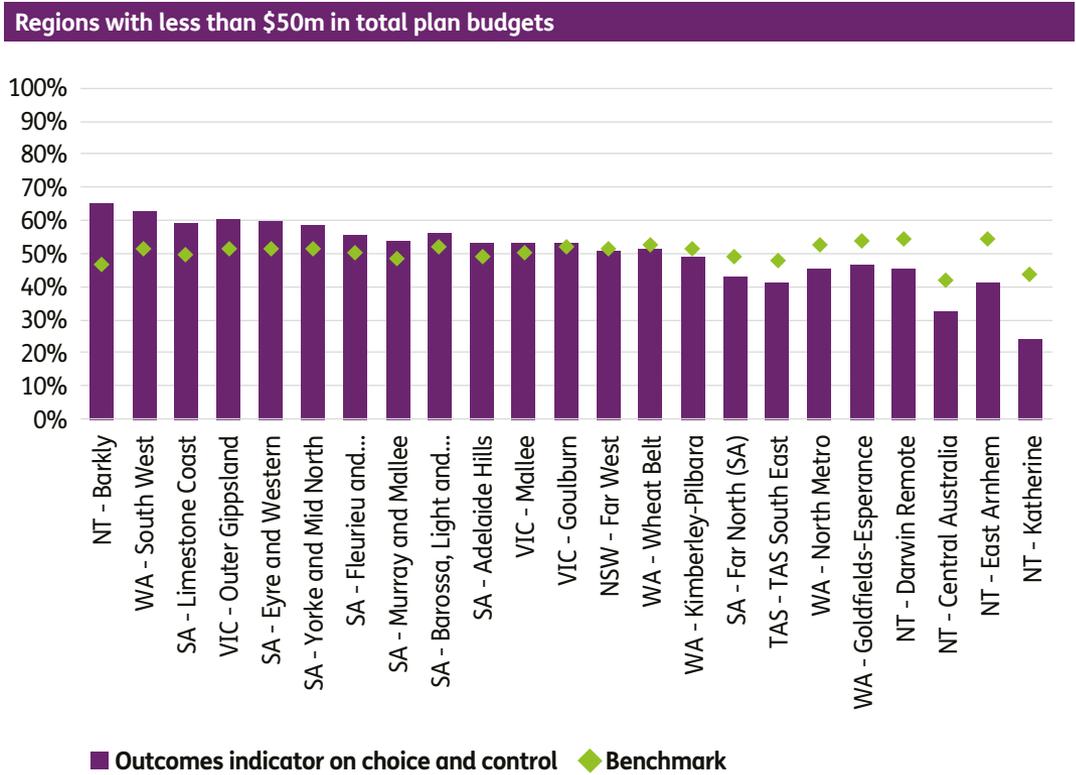


The outcomes indicator on choice and control has increased slightly since June 2019

The nationwide response to the Outcomes indicator on Choice and Control has risen from 49% to 50%. Overall this indicates a slight improvement since the June 2019 NDIS Market Report

- As shown on the charts on the preceding slide, the number of regions greater than five percentage points below the benchmark has risen from eleven (out of 64) to 14 (out of 76) – a three region increase.
- Two of the regions – Goldfields-Esperance (WA) and North Metro (WA) were not covered in the June report.
- Overall, considering only the 64 regions covered in the June report, the number of regions greater than five percentage points below the benchmark has increased by one.
- This is the net result of Far North (SA) and North West Sydney (NSW) falling to greater than five percentage points below benchmark and Robina (QLD) rising to fewer than five points below benchmark.
- The number of regions above the benchmark has increased from 38 (out of 64) to 43 (out of 76).
- The number of regions greater than five percentage points above the benchmark has risen from twelve to 19. Two of these regions - Outer Gippsland (VIC) and South West (WA) were not covered in the June report – indicating that five regions have moved to a higher category above the benchmark since June.
- These were: Toowoomba (QLD), Fleurieu and Kangaroo Island (SA), Murray and Mallee (SA), Yorke and Mid North (SA) and TAS South West (TAS).
- Overall this indicates a slight increase in positive responses to the Outcomes indicator on Choice and Control.

The regions more than 10% below the benchmark had less than \$50m in total plan budgets



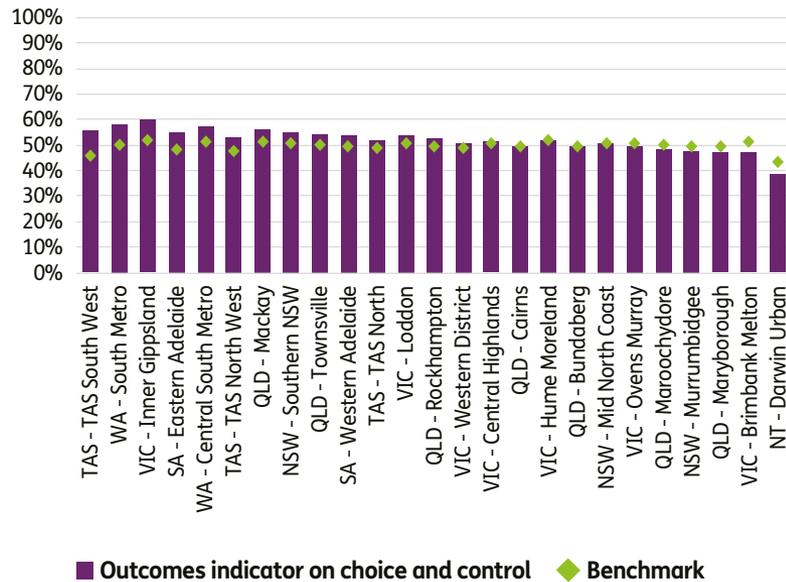
The chart on the left shows the outcomes indicator on choice and control for each of the bilateral regions that had less than \$50m in total plan budgets for the period.

The notable regions in this category are the East Arnhem (NT) and Katherine (NT) regions. The indicator for these regions was more than 10% below the benchmark. These regions were in a similar position in the June 2019 NDIS Market report and were covered in detail there.

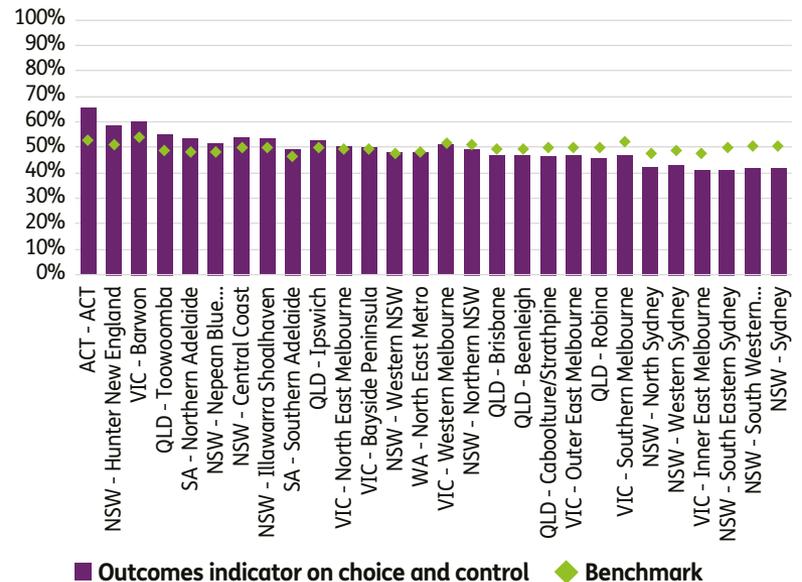
Other regions worth highlighting are Barkly (NT), South West (WA) and Limestone Coast (SA) that all have an indicator more than 10% above the benchmark. Barkly (NT) was covered the June report and Limestone Coast (SA) is examined in section 3.

The outcomes indicator on choice and control was more than 10% above the benchmark for the TAS South West (TAS) and ACT (ACT) regions

Regions with \$50m to \$150m in total plan budgets



Regions with greater than \$150m in total plan budgets



- The above charts show the outcomes indicator on choice and control for each of the bilateral regions that had \$50m to \$150m and greater than \$150m in total plan budgets for the period.
- None of these regions had an outcomes indicator on choice and control of more than 10% below the benchmark. The two regions from these categories that had an indicator that was more than 10% above the benchmark, were the TAS South West (TAS) and ACT (ACT) regions.

03.

Regional hotspots

Hotspots are regions that score relatively worse against one or many corporate target metric benchmarks compared with other regions

Review and analysis of hotspots allows us to understand the characteristics of regions where the NDIS market may not be functioning well as other regions.

Hotspots were chosen based on the corporate target metrics and where that region sits in relation to its benchmark. Key identifiers are:

- **Utilisation rate more than ten percentage points below benchmark.**
- **More than 95% of payments go to the top ten providers (provider concentration)**
- **Outcomes indicator on choice and control is more than ten percentage points below benchmark.**

The following regions have been identified as hotspots for the reason(s) shown:

-
- **Outer Gippsland (VIC)** – low utilisation
 - **Eyre and Western (SA)** – low utilisation
 - **Darwin Remote (NT)** – low utilisation
 - **Goldfields-Esperance (WA)** – low utilisation and high provider concentration
 - **Kimberley-Pilbara (WA)** – low utilisation and high provider concentration
 - **Central Australia (NT)** – low choice and control outcomes indicator score
-

Additionally, Limestone Coast (SA) is discussed as an example of a region performing well in relation to its benchmarks, particularly on the choice and control outcomes indicator metric.

Hotspots identified in the June 2019 NDIS Market report have changed

The June NDIS Market report covered twelve hotspots. Of these, six hotspots were chosen according to similar criteria as set out in the following slide (i.e. poor performance relative to benchmark) and six were chosen for strong performance against the corporate target benchmarks.

The following four regions covered in June report remain hotspots in December for the same reasons identified previously. They are not covered in this report to avoid repetition.

-
- **Barkly (NT)** – low utilisation and high provider concentration
 - **East Arnhem (NT)** – low utilisation and low choice and control outcomes indicator score
 - **Far North (SA)** – low utilisation
 - **Katherine (NT)** – low choice and control outcomes indicator score
-

Murray and Mallee (SA) was identified as a hotspot in the June 2019 report for low utilisation. It is no longer considered a hotspot as utilisation has sufficiently improved relatively to the benchmark.

Central Australia (NT) was identified as a hotspot in the June 2019 report for its high provider concentration (>95%). At December 2019, provider concentration is now below 95%, however, the choice and control outcomes indicator is almost 10% below the benchmark, so has still been included in the analysis.

The six ‘strong performance’ hotspots are all still strong performers, and are not covered in this report to avoid repetition. They are South Metro (WA), Hume Moreland (VIC), South Western Sydney (NSW), Brisbane (QLD), South West (TAS) and ACT (ACT).

Regional hotspots

Outer Gippsland (VIC)

Lower utilisation for Outer Gippsland (VIC) region was driven by the Core – Community, Capacity Building – Daily Activities and Capacity Building – Support Coordination support categories

Outer Gippsland (VIC): Utilisation by support category					
Support category	Active participants with approved plans	Total plan budgets (\$m)	Total payments (\$m)	Utilisation	Benchmark
Core					
Consumables	1,197	0.92	0.24	26%	53%
Daily Activities	1,116	16.22	9.92	61%	63%
Community	1,145	10.63	3.40	32%	55%
Transport	679	0.91	0.77	85%	53%
Core total	1,296	28.69	14.34	50%	59%
Capacity Building					
Choice and Control	1,050	0.60	0.50	84%	52%
Daily Activities	1,259	3.70	0.95	26%	52%
Social and Civic	183	0.41	0.05	11%	49%
Support Coordination	570	0.97	0.35	36%	55%
Capacity Building total	1,321	6.48	2.11	33%	53%
Capital					
Assistive Technology	258	0.96	0.41	43%	58%
Home Modifications	115	0.38	0.19	51%	77%
Capital total	314	1.34	0.60	45%	63%
All support categories	1,340	36.54	17.14	47%	58%

Plan utilisation was lowest, relative to the benchmark, for the Capacity Building – Social and Civic and Core – Consumables support categories.

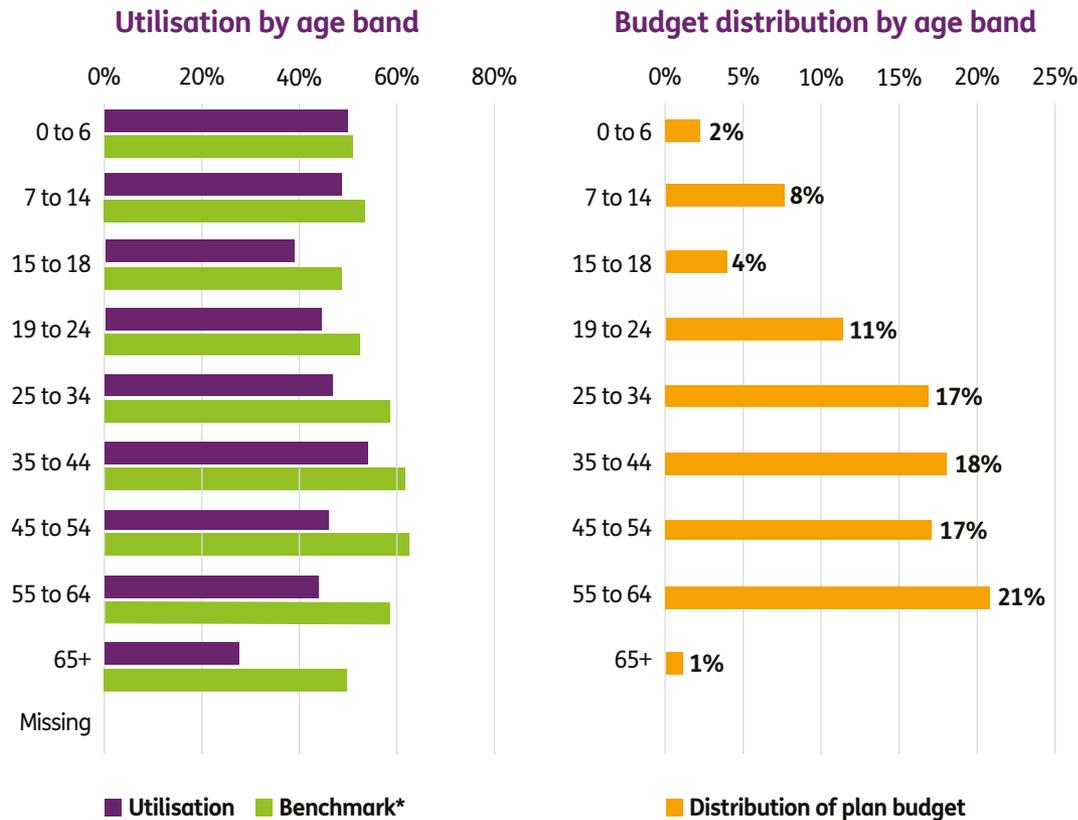
However, the overall utilisation result was largely driven by low utilisation in the Core – Community and Capacity Building – Daily Activity and Capacity Building – Support Coordination support categories.

Utilisation for the largest support category Core – Daily Activities was close to the benchmark.

Note: only the major support categories are shown

Utilisation for participants in the Outer Gippsland (VIC) region was particularly low for older participants aged 45+

Outer Gippsland (VIC): All support categories



Utilisation was lower across all age bands when compared against the benchmark utilisation.

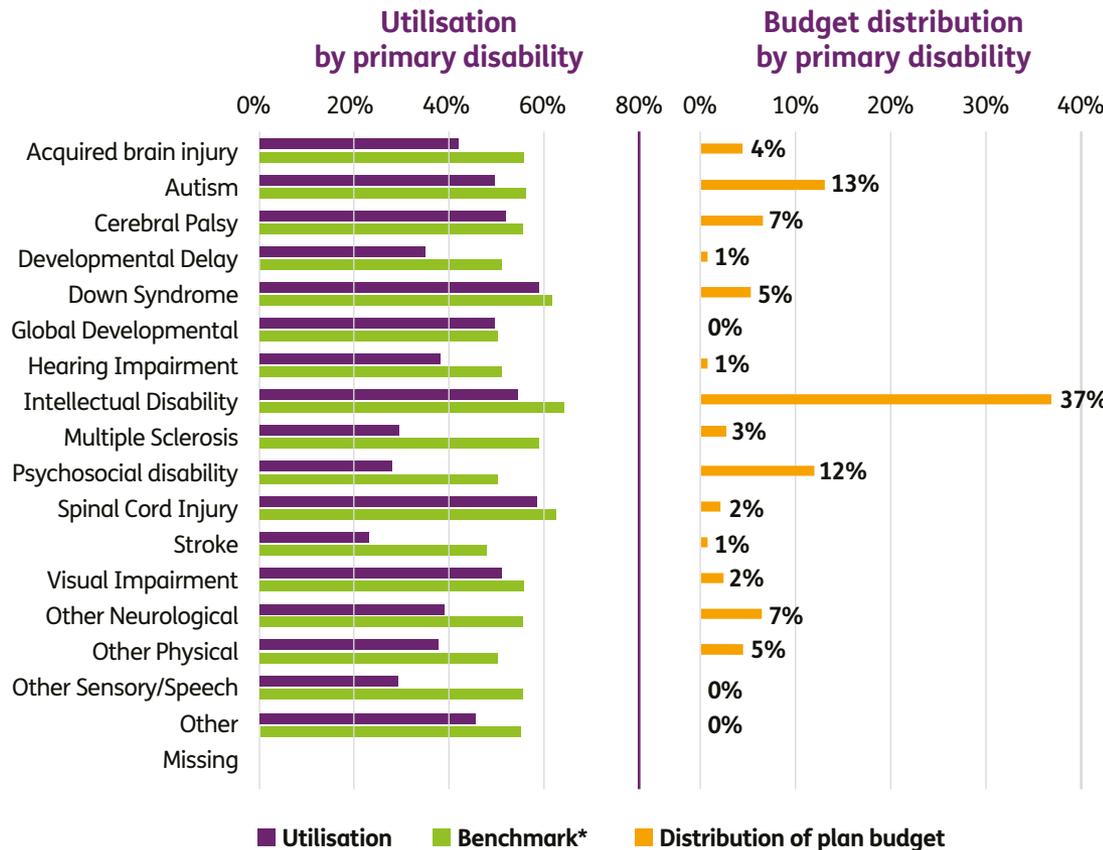
In particular, this gap was larger for participants aged 45+ who constitute a large proportion of the region's budget.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Participants with psychosocial disability or other neurological disability were key contributors to lower utilisation for the Outer Gippsland (VIC) region

Outer Gippsland (VIC): All support categories

Psychosocial disability and other neurological disability, which represent 12% and 7% of total budgets respectively, have particularly low utilisation compared to their benchmark.



*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Regional hotspots

Eyre and Western (SA)

Compared to the benchmark, lower utilisation in Eyre and Western (SA) was driven by Core – Daily Activities and Capacity Building – Daily Activities

Eyre and Western (SA): Utilisation by support category

Support category	Active participants with approved plans	Total plan budgets (\$m)	Total payments (\$m)	Utilisation	Benchmark
Core					
Consumables	710	0.77	0.24	32%	60%
Daily Activities	687	14.41	8.26	57%	68%
Community	693	4.78	2.48	52%	61%
Transport	343	0.43	0.35	83%	62%
Core total	799	20.39	11.34	56%	66%
Capacity Building					
Choice and Control	382	0.29	0.23	79%	60%
Daily Activities	882	4.83	1.93	40%	63%
Support Coordination	432	0.73	0.08	11%	62%
Capacity Building total	905	6.78	2.63	39%	62%
Capital					
Assistive Technology	213	0.87	0.38	44%	64%
Capital total	241	1.09	0.44	40%	67%
All support categories	906	28.95	15.39	53%	65%

Plan utilisation was very low for Capacity Building – Support Coordination.

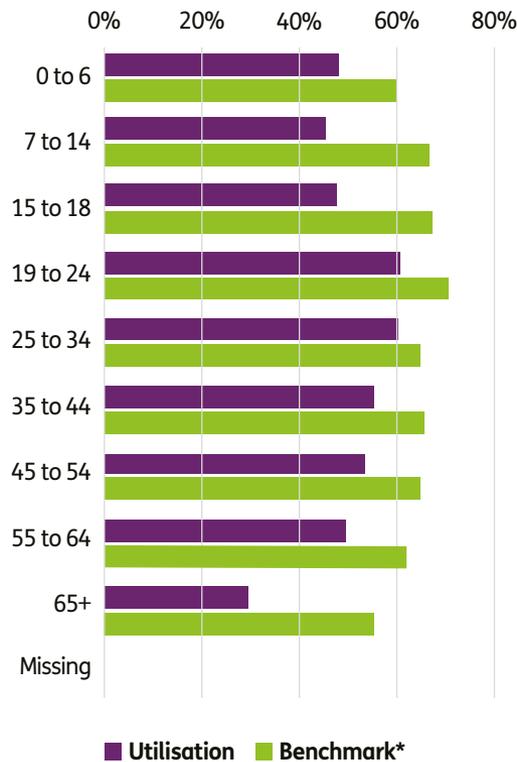
However, the overall utilisation result was largely driven by low utilisation in the Core – Daily Activities and Capacity Building – Daily Activities support categories.

Note: only the major support categories are shown

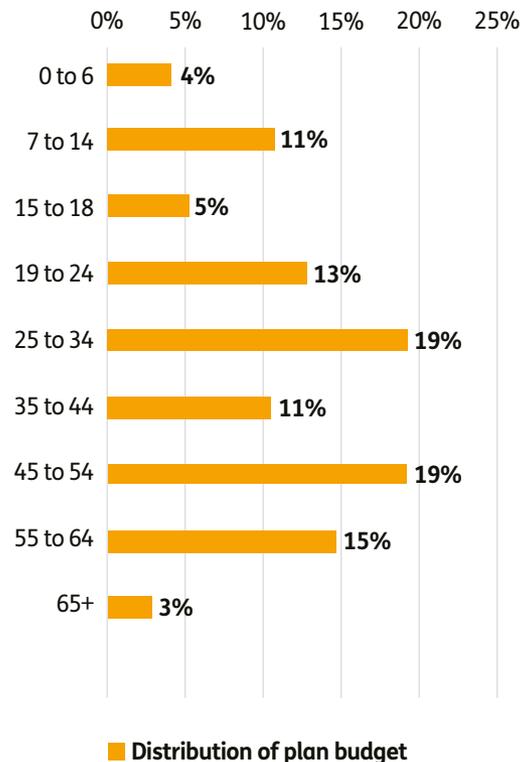
Participants aged seven to 18 and 65+ had lower utilisation in Eyre and Western (SA) compared to other aged groups

Eyre and Western (SA): All support categories

Utilisation by age band



Budget distribution by age band



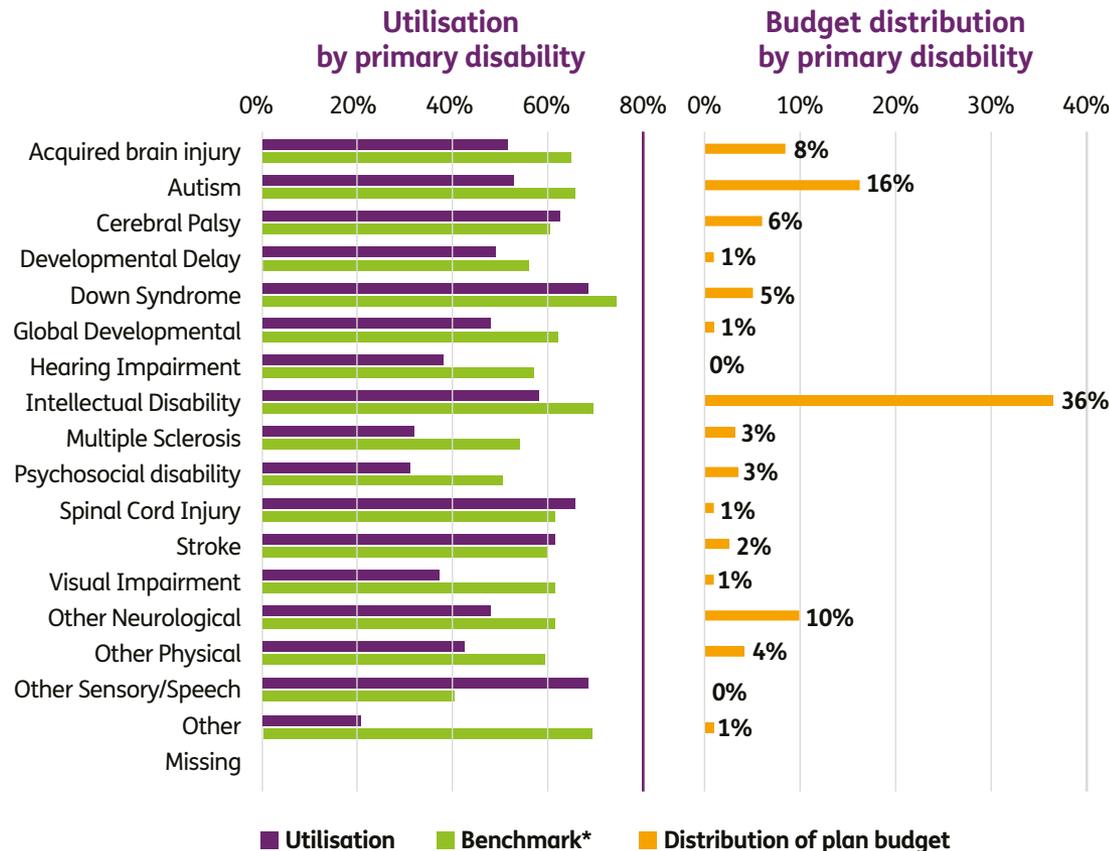
Utilisation was lower across all age bands when compared against the benchmark utilisation.

In particular, this gap was larger for participants aged seven to 18 and 65+.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Participants with intellectual disability had low utilisation rates (compared to benchmark) for the Eyre and Western (SA) region

Eyre and Western (SA): All support categories



Intellectual disability which represent 36% of total budgets respectively, have a utilisation that is 12% below the benchmark rate.

Other drivers of experience include participants with an acquired brain injury, autism and other physical disability which all have utilisation rates below the benchmark.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Regional hotspots

Darwin Remote (NT)

The gap between utilisation and benchmark for the Darwin Remote (NT) region was driven by the Core – Community and Capacity Building – Daily Activity support categories

Darwin Remote (NT): Utilisation by support category					
Support category	Active participants with approved plans	Total plan budgets (\$m)	Total payments (\$m)	Utilisation	Benchmark
Core					
Consumables	230	0.19	0.03	16%	62%
Daily Activities	203	2.76	1.08	39%	62%
Community	204	1.85	0.54	29%	61%
Transport	151	0.16	0.05	28%	62%
Core total	231	4.97	1.70	34%	62%
Capacity Building					
Daily Activities	250	1.73	0.45	26%	59%
Employment	15	0.06	0.01	14%	61%
Social and Civic	69	0.29	0.02	6%	56%
Support Coordination	248	1.30	0.66	51%	61%
Capacity Building total	250	3.50	1.20	34%	59%
Capital					
Assistive Technology	88	0.43	0.16	37%	64%
Home Modifications	13	0.01	0.00	45%	61%
Capital total	88	0.44	0.17	38%	64%
All support categories	250	8.91	3.06	34%	61%

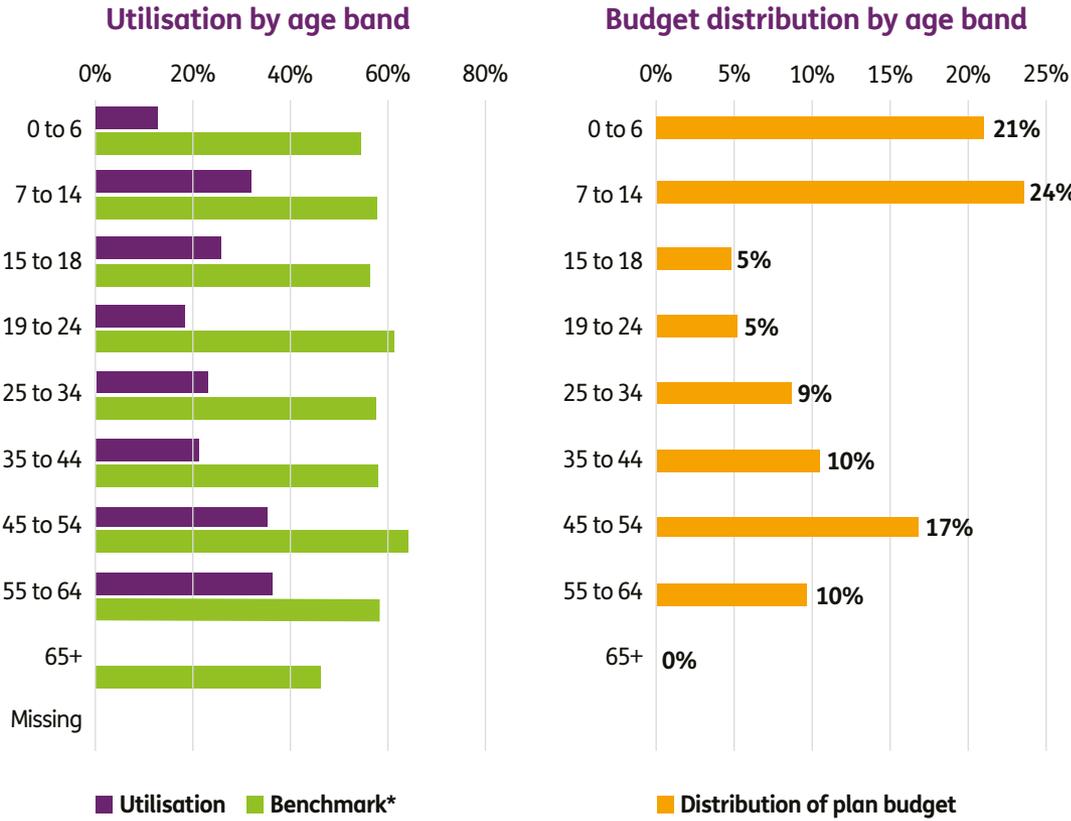
Plan utilisation was lowest, relative to the benchmark, for the Capacity Building – Employment and Capacity Building – Social and Civic support categories.

However, the overall utilisation result was largely driven by low utilisation in the Core – Community and Capacity Building – Daily Activity support categories.

Note: only the major support categories are shown

Utilisation for participants in the Darwin Remote (NT) region was below benchmark across all age bands

Darwin Remote (NT): Capacity Building – Daily Activity



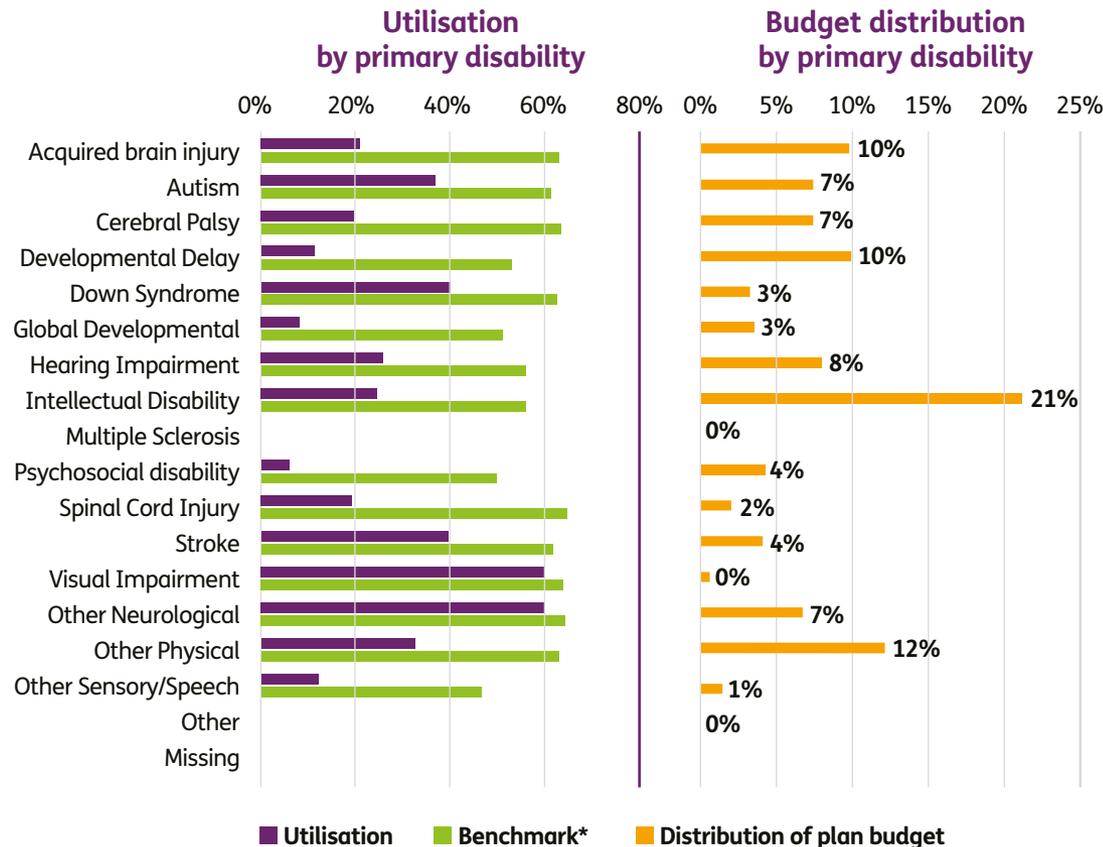
Utilisation for Capacity Building – Daily Activity supports was below the benchmark for all age bands and the gap was larger for participants aged 19 to 44.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Utilisation for participants with developmental delay or intellectual disability were key contributors to the utilisation result for the Darwin Remote (NT) region

Darwin Remote (NT): Capacity Building – Daily Activity

Participants with developmental delay and intellectual disability represented 31% of Capacity Building – Daily Activity supports for the region. The gap to benchmark for these participants was a key driver of the overall result.



*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Regional hotspots

Goldfields-Esperance (WA)

Provider concentration in Goldfields-Esperance (WA) is higher than benchmark across all support categories

Goldfields-Esperance (WA): Provider Concentration by support category				
Support category	Active participants with approved plans	Registered active providers	Provider concentration	Utilisation
Core				
Consumables	198	7	100%	28%
Daily Activities	182	11	100%	49%
Community	214	11	100%	46%
Transport	106	3	100%	91%
Core total	265	20	99%	49%
Capacity Building				
Choice and Control	98	9	100%	59%
Daily Activities	286	15	97%	31%
Support Coordination	218	12	98%	17%
Capacity Building total	311	25	92%	31%
Capital				
Assistive Technology	90	8	100%	12%
Capital total	93	9	100%	11%
All support categories	317	41	95%	42%

Goldfields-Esperance (WA) was one of the top potential hot spot for regions with less than \$50m in total plan budgets with a provider concentration of 95%.

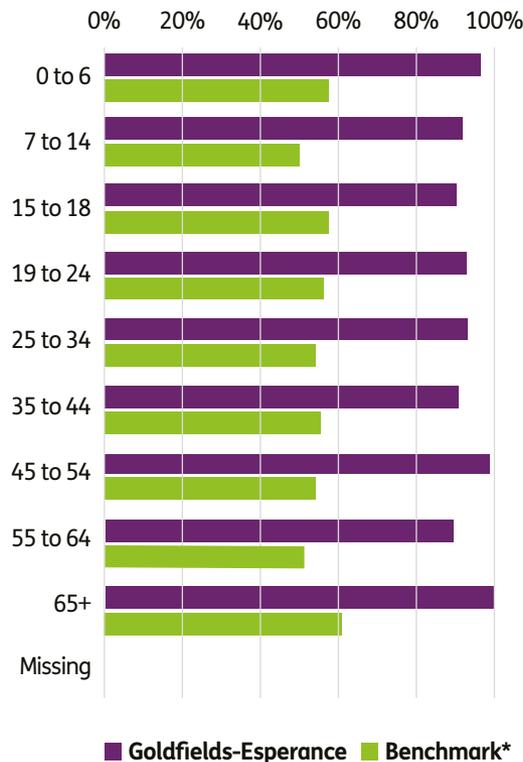
High levels of provider concentration are driven by a small (15 or under) number of providers across the support categories with the largest number of providers.

Note: only the major support categories are shown

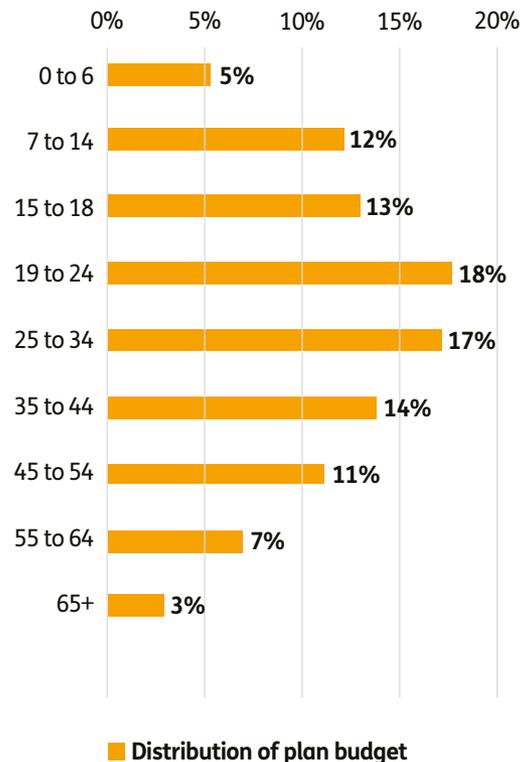
Provider concentration for participants in the Goldfields-Esperance (WA) region was greater than benchmark across all age bands

Goldfields-Esperance (WA): All support categories

Provider concentration by age band



Budget distribution by age band



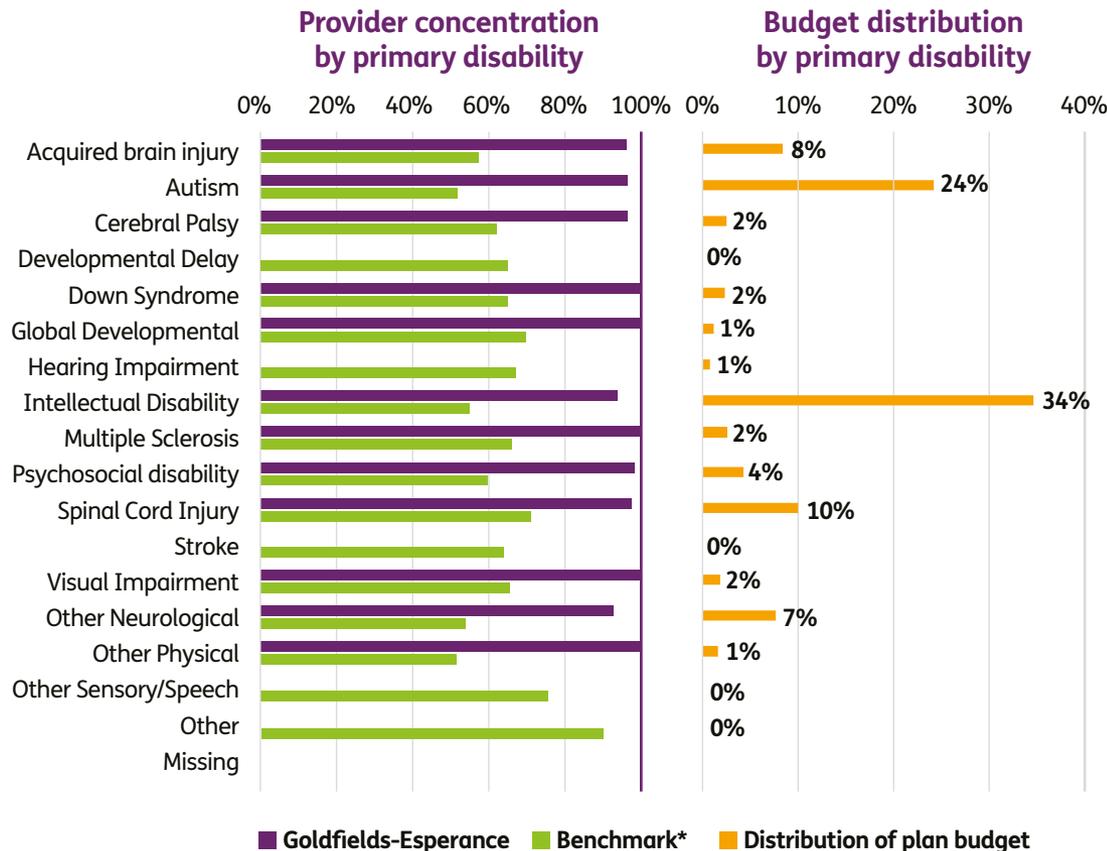
This region exhibited higher provider concentration regardless of age, compared to each segment's equivalent benchmark.

*The benchmark is the unweighted national average for that age band. Given the more granular nature of these segments, the provider concentration metric shown in the charts has been defined as payments made to the top five providers, instead of the top ten.

Provider concentration for participants in the Goldfields-Esperance (WA) region was greater than benchmark across all disability types

Goldfields-Esperance (WA): All support categories

This region exhibited higher provider concentration regardless of primary disability, compared to each segment's equivalent benchmark.



*The benchmark is the unweighted national average for that age band. Given the more granular nature of these segments, the provider concentration metric shown in the charts has been defined as payments made to the top five providers, instead of the top ten.

The gap between utilisation and benchmark for the Goldfields-Esperance (WA) region was driven by the Capacity Building – Daily Activity support category

Goldfields Esperance (WA): Utilisation by support category					
Support category	Active participants with approved plans	Total plan budgets (\$m)	Total payments (\$m)	Utilisation	Benchmark
Core					
Consumables	198	0.18	0.05	28%	51%
Daily Activities	182	2.66	1.31	49%	56%
Community	214	1.54	0.70	46%	52%
Transport	106	0.18	0.16	91%	51%
Core total	265	4.56	2.23	49%	54%
Capacity Building					
Choice and Control	98	0.07	0.04	59%	50%
Daily Activities	286	1.18	0.36	31%	50%
Employment	36	0.21	0.11	51%	50%
Relationships	32	0.11	0.00	1%	51%
Social and Civic	32	0.10	0.03	30%	48%
Support Coordination	218	0.20	0.03	17%	53%
Capacity Building total	311	1.89	0.58	31%	50%
Capital					
Assistive Technology	90	0.37	0.05	12%	54%
Home Modifications	16	0.04	0.00	1%	60%
Capital total	93	0.42	0.05	11%	55%
All support categories	317	6.87	2.86	42%	53%

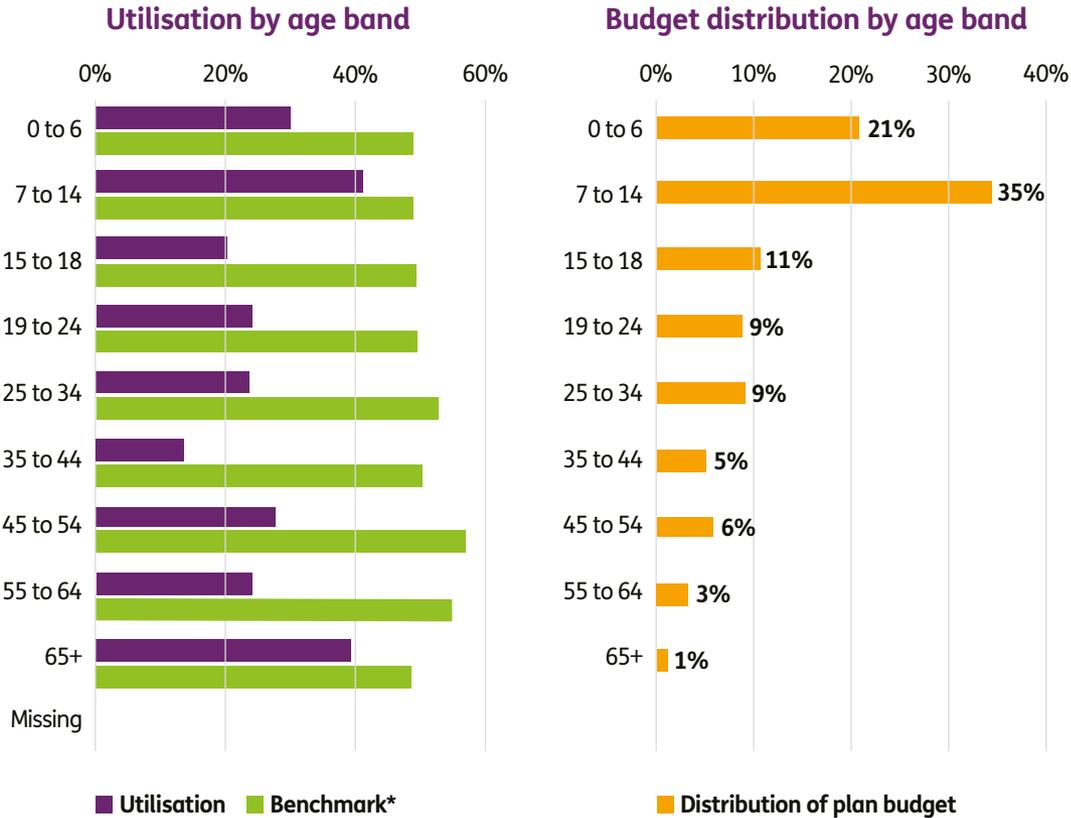
As shown in the table on the left, the predominant areas of support spending in Goldfields – Esperance are in Core – Daily Activities (39% of total plan budget), Core – Community (22% of total plan budget) and Capacity Building – Daily Activities (17% of total plan budget).

All three of these categories show utilisation rates below benchmark for that support category, however the large gap (19 points) gap shown for ‘Capacity Building – Daily Activities’ pulls down the overall result.

Note: only the major support categories are shown

Utilisation for participants in the Goldfields-Esperance (WA) region was below benchmark across all age bands

Goldfields-Esperance (WA): Capacity Building – Daily Activity



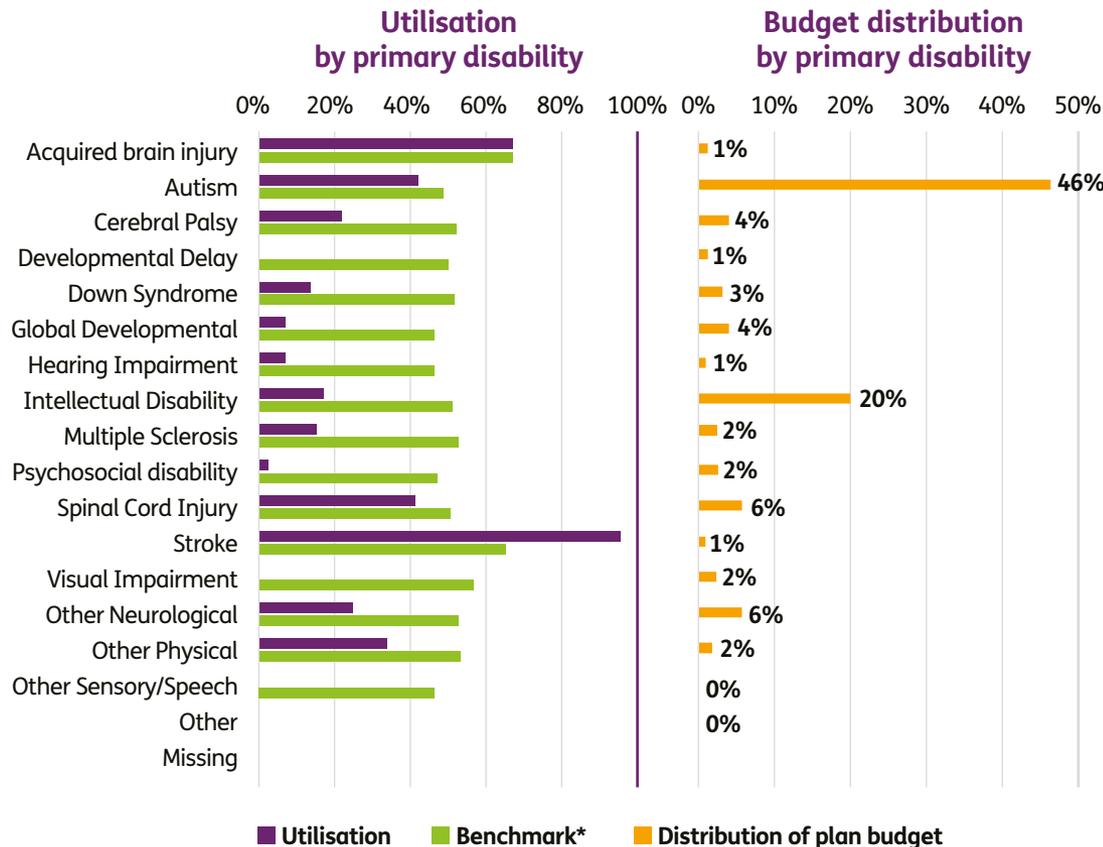
Utilisation for Capacity Building – Daily Activity supports was below the benchmark for all ages and the gap was largest for participants aged 35 to 44.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Utilisation for participants with intellectual disability was the key contributor to the utilisation result for the Goldfields-Esperance (WA) region

Goldfields-Esperance (WA): Capacity Building – Daily Activity

Participants with intellectual disability represented 20% of Capacity Building – Daily Activity supports for the region. The gap to benchmark for these participants was the key driver of the overall result.



*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Regional hotspots

Kimberley-Pilbara (WA)

Provider concentration in Kimberley-Pilbara (WA) is higher than benchmark across all support categories.

Kimberley-Pilbara (WA): Provider Concentration by support category

Support category	Active participants with approved plans	Registered active providers	Provider concentration	Utilisation
Core				
Consumables	397	16	98%	19%
Daily Activities	340	18	99%	62%
Community	427	19	98%	40%
Transport	251	7	100%	65%
Core total	624	38	98%	54%
Capacity Building				
Choice and Control	86	13	94%	39%
Daily Activities	693	29	97%	41%
Employment	47	3	100%	4%
Social and Civic	41	4	100%	43%
Support Coordination	521	20	94%	17%
Capacity Building total	732	45	95%	36%
Capital				
Assistive Technology	259	21	93%	7%
Capital total	260	21	93%	7%
All support categories	757	71	94%	45%

Kimberley-Pilbara (WA) has high provider concentration of 94%.

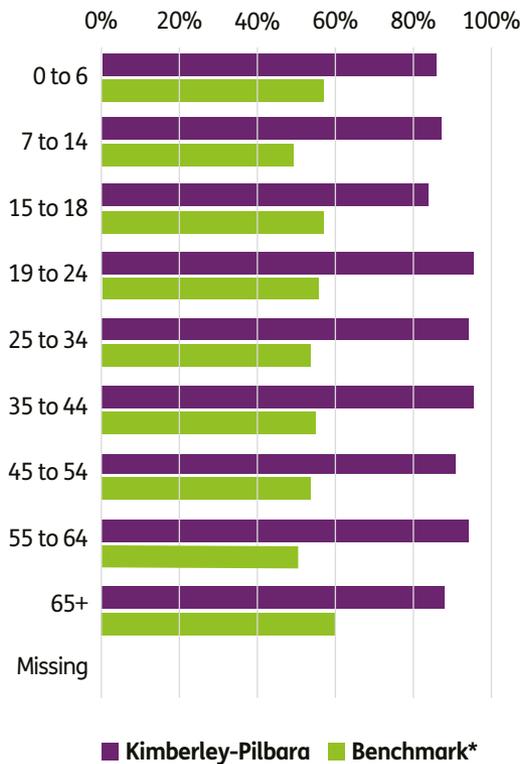
Provider concentration was consistently high across all support categories, especially compared to the national average benchmark of 85%.

Note: only the major support categories are shown

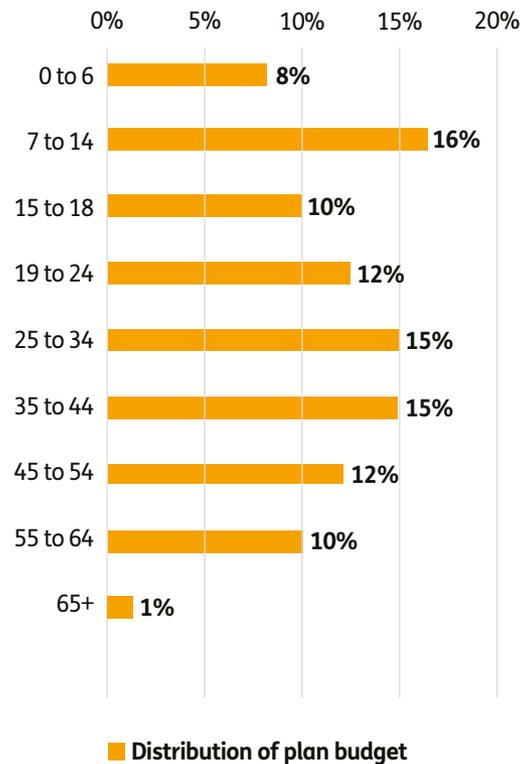
Provider concentration for participants in the Kimberley-Pilbara (WA) region was greater than benchmark across all age bands

Kimberley-Pilbara (WA): All support categories

Provider concentration by age band



Budget distribution by age band

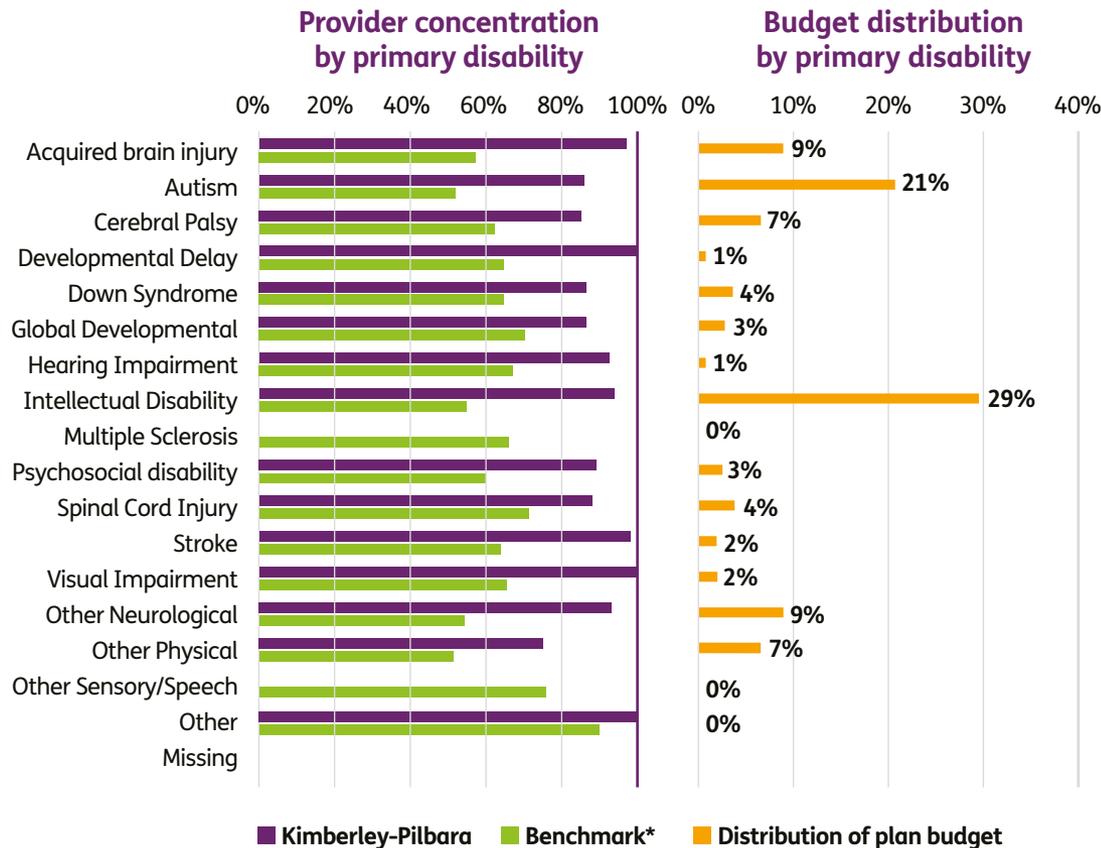


This region exhibited higher provider concentration regardless of age, compared to each segment's equivalent benchmark.

*The benchmark is the unweighted national average for that age band. Given the more granular nature of these segments, the provider concentration metric shown in the charts has been defined as payments made to the top five providers, instead of the top ten.

Above benchmark provider concentration benchmark is driven by participants with psychosocial disability and intellectual disability

Kimberley-Pilbara (WA): All support categories



The two major primary disability types in the Kimberley-Pilbara (WA) region were autism (21%) and intellectual disability (29%).

While provider concentration is above benchmark for all disability types, acquired brain injury, autism and intellectual disability are most impactful due to making up 59% of plan budgets.

*The benchmark is the unweighted national average for that age band. Given the more granular nature of these segments, the provider concentration metric shown in the charts has been defined as payments made to the top five providers, instead of the top ten.

The gap between utilisation and benchmark for the Kimberley-Pilbara (WA) region was driven by the Core – Community and Capacity Building – Daily Activity support categories

Kimberley-Pilbara (WA): Utilisation by support category					
Support category	Active participants with approved plans	Total plan budgets (\$m)	Total payments (\$m)	Utilisation	Benchmark
Core					
Consumables	397	0.48	0.09	19%	53%
Daily Activities	340	7.72	4.80	62%	62%
Community	427	3.94	1.58	40%	52%
Transport	251	0.38	0.25	65%	53%
Core total	624	12.53	6.72	54%	58%
Capacity Building					
Choice and Control	86	0.06	0.02	39%	55%
Daily Activities	693	4.98	2.06	41%	51%
Employment	47	0.36	0.01	4%	50%
Relationships	33	0.19	0.02	8%	48%
Social and Civic	41	0.34	0.15	43%	55%
Support Coordination	521	0.75	0.12	17%	53%
Capacity Building total	732	6.70	2.38	36%	51%
Capital					
Assistive Technology	259	1.29	0.09	7%	53%
Home Modifications	12	0.06	0.00	4%	49%
Capital total	260	1.35	0.09	7%	53%
All support categories	757	20.58	9.19	45%	56%

The largest support category (by total plan budget) is on Core – Daily Activities, which accounts for 38% of the overall total plan budget. Utilisation of these supports is at the benchmark level for that category and region.

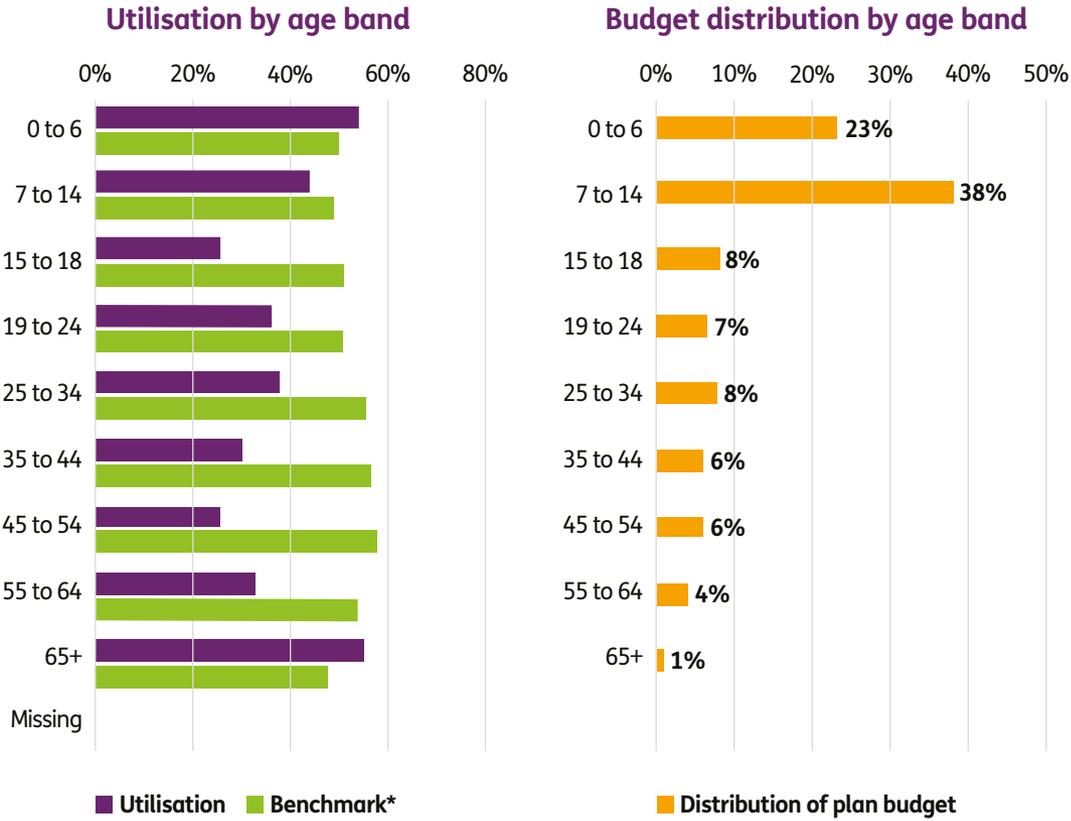
However Core – Community and Capacity Building – Daily Activities (19% and 24% of total plan budget respectively) both have utilisation rates more than ten percentage points below benchmark.

This pulls down the overall utilisation rate and results in an overall gap to the benchmark of eleven percentage points.

Note: only the major support categories are shown

Utilisation for participants in the Kimberley-Pilbara (WA) region was below benchmark across all age bands

Kimberley-Pilbara (WA): Capacity Building – Daily Activity

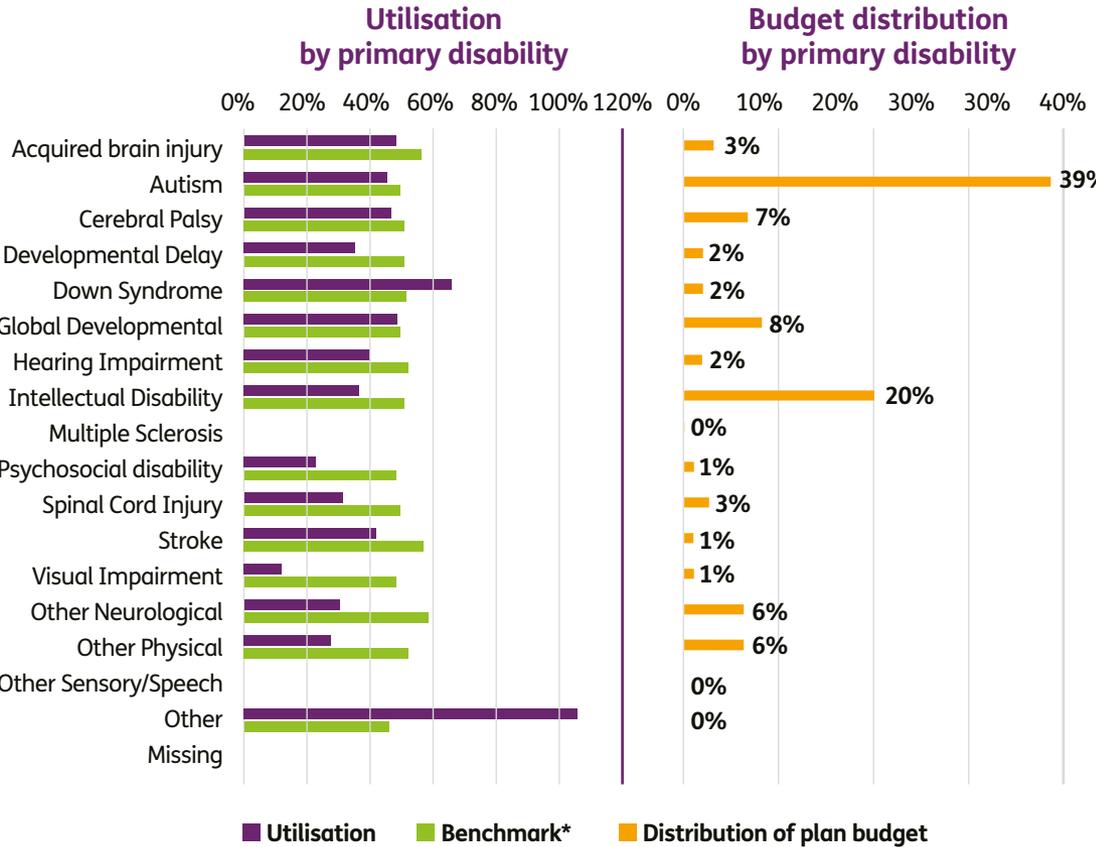


Utilisation for Capacity Building – Daily Activity supports was below the benchmark for all ages and the gap was largest for participants aged 35 to 44.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Utilisation for participants with autism or intellectual disability was the key contributor to the utilisation result for the Kimberley-Pilbara (WA) region

Kimberley-Pilbara (WA): Capacity Building – Daily Activity



Participants with autism or intellectual disability represented 59% of Capacity Building – Daily Activity supports for the region. The gap to benchmark for these participants was the key driver of the overall result.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants and plan number.

Regional hotspots

Central Australia (NT)

The outcomes indicator on choice and control was below benchmark for Central Australia (NT) for most support categories

Central Australia (NT): Outcomes indicator on choice and control by support category

Support category	Active participants with approved plans	Do you choose who supports you?	Benchmark	Utilisation
Core				
Consumables	374	32%	42%	26%
Daily Activities	355	32%	42%	82%
Community	354	33%	42%	46%
Transport	235	30%	40%	73%
Core total	376	32%	42%	74%
Capacity Building				
Choice and Control	135	62%	52%	63%
Daily Activities	387	32%	42%	27%
Employment	34	24%	37%	22%
Relationships	82	6%	30%	28%
Social and Civic	83	41%	47%	11%
Support Coordination	380	32%	42%	71%
Capacity Building total	388	32%	42%	41%
Capital				
Assistive Technology	183	40%	42%	29%
Home Modifications	72	16%	23%	6%
Capital total	203	35%	38%	21%
All support categories	389	32%	42%	68%

The outcomes indicator on choice and control was below the benchmark for most support categories. The overall choice and control outcomes indicator result is mostly driven by Core Supports.

The largest gap is for Relationships supports (Capacity Building) – where the outcomes indicator is 24 percentage points below benchmark.

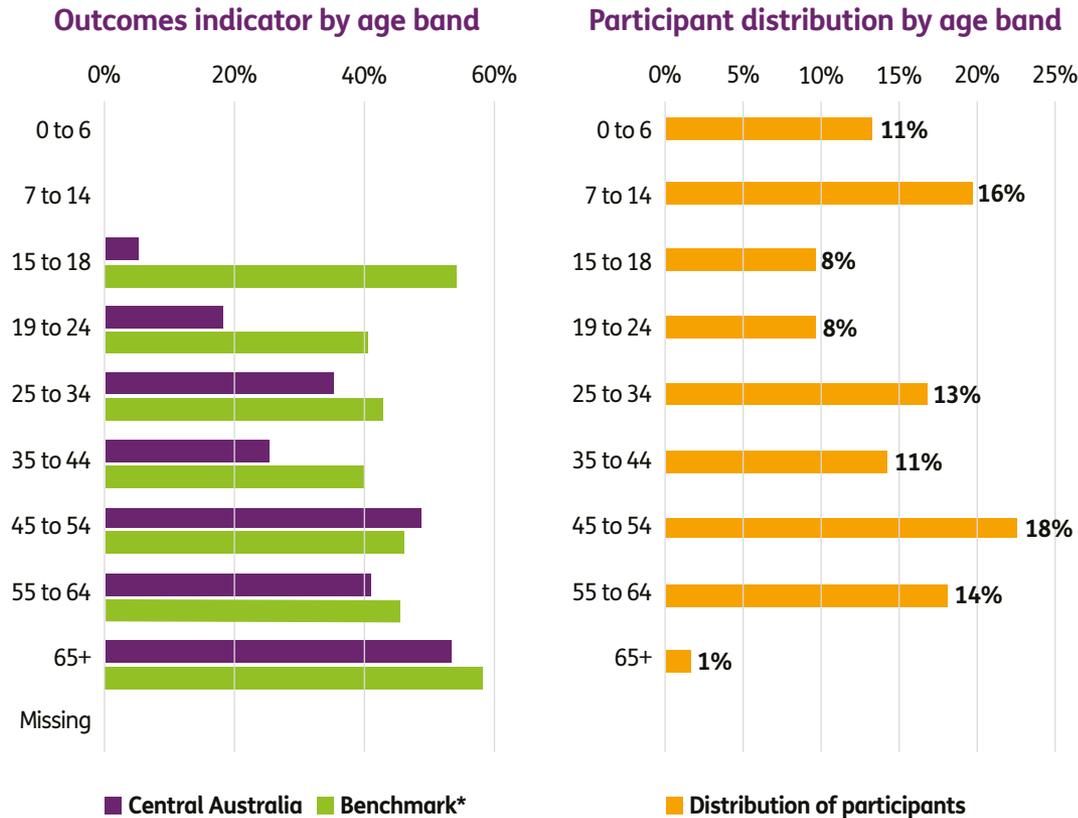
Capacity Building – Choice and Control is the only support category above benchmark (by ten percentage points).

Utilisation is also shown for comparison.

Note: only the major support categories are shown

The outcomes indicator on choice and control being above benchmark is driven by participants between 19 and 44 years of age

Central Australia (NT): All support categories



A low proportion of participants aged 15 to 18 years and younger reported that they choose who supports them relative to older age bands. Key drivers of the overall outcomes indicator result are the 19 to 24 and 35 to 44 age bands, both of which are below benchmark.

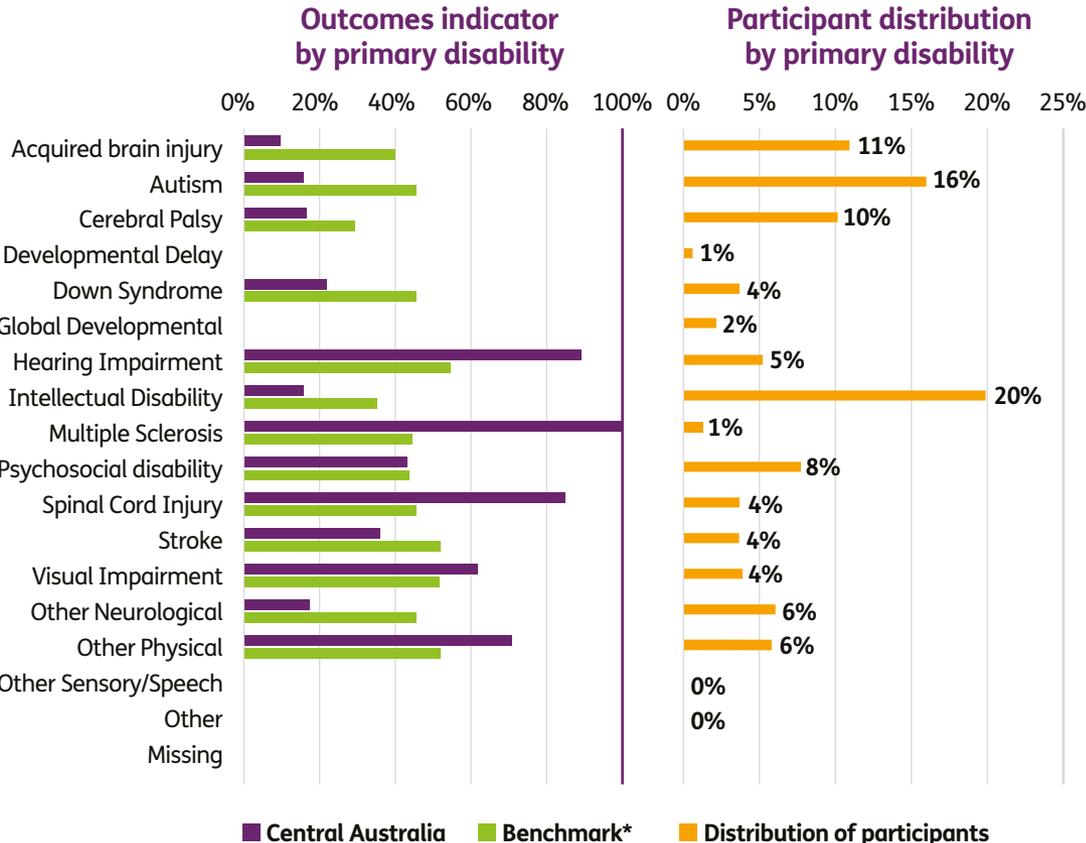
For the 45 to 54 age band, the outcomes indicator is above benchmark, and it is only slightly below the benchmark for the 55 to 64 age band.

Note that the outcomes questionnaire for participants under 14 does not include the question: Do you choose who supports you?

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants.

The outcomes indicator on choice and control is above benchmark driven by participants with an acquired brain injury and intellectual disability

Central Australia (NT): All support categories



The two major primary disability types (by number of participants) in the Central Australia (NT) region were autism (16%) and intellectual disability (20%), both of which were substantially below benchmark for the outcomes indicator on choice and control.

These two primary disability types, along with acquired brain injury and cerebral palsy, are the key drivers of the overall outcomes indicator result.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants.

Regional hotspots

Limestone Coast (SA)

The outcomes indicator on choice and control was above benchmark for Limestone Coast (SA) for all support categories

Limestone Coast (SA): Outcomes indicator on choice and control by support category

Support category	Active participants with approved plans	Do you choose who supports you?	Benchmark	Utilisation
Core				
Consumables	800	57%	49%	28%
Daily Activities	776	58%	49%	70%
Community	773	57%	50%	45%
Transport	390	49%	47%	95%
Core total	870	58%	49%	65%
Capacity Building				
Choice and Control	421	56%	52%	90%
Daily Activities	933	58%	49%	38%
Employment	142	65%	49%	76%
Relationships	46	33%	31%	10%
Social and Civic	41	63%	52%	12%
Support Coordination	321	41%	44%	15%
Capacity Building total	955	59%	50%	43%
Capital				
Assistive Technology	191	56%	48%	78%
Home Modifications	80	37%	30%	12%
Capital total	231	51%	43%	37%
All support categories	957	59%	50%	61%

The outcomes indicator on choice and control was above the benchmark for all support categories.

The largest gap is for Employment supports (Capacity Building) – where the outcomes indicator is 16 percentage points above benchmark.

The smallest gap is seen for Relationship supports (Capacity Building) and Transport supports (Core) where the outcomes indicator is two percentage points above benchmark.

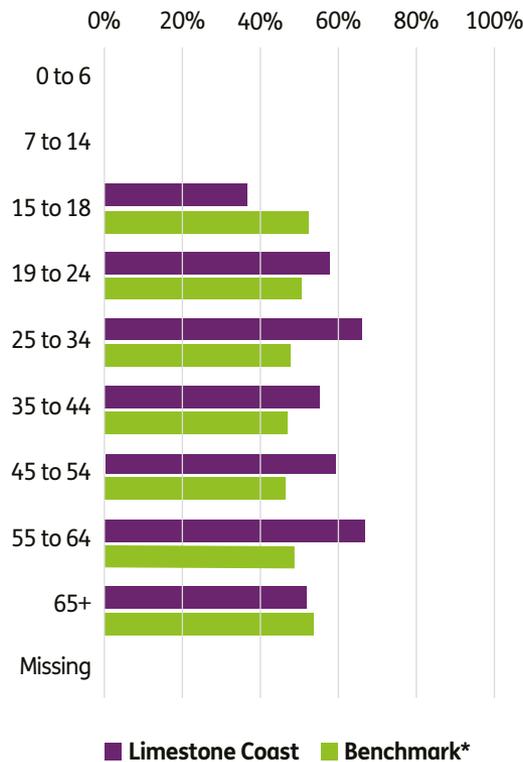
Utilisation is also shown for comparison.

Note: only the major support categories are shown

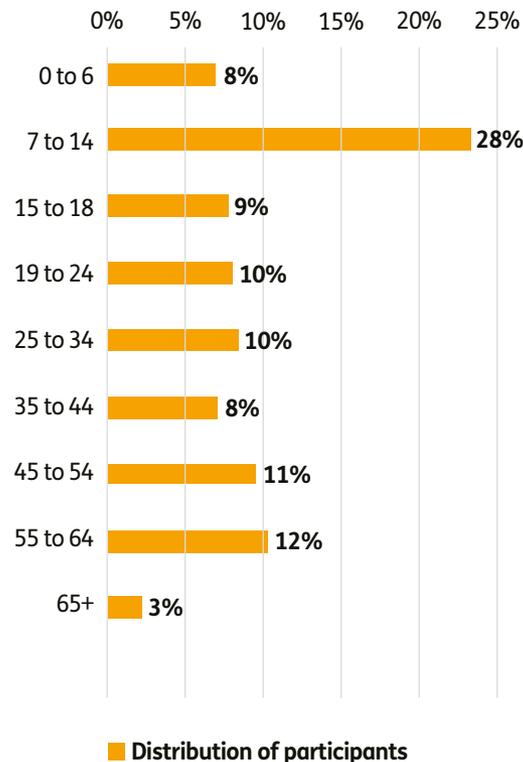
The outcomes indicator on choice and control is above benchmark driven by participants between 19 and 64 years of age

Limestone Coast (SA): all support categories

Outcomes indicator by age band



Participant distribution by age band



A low proportion of participants aged 15 to 18 years and younger reported that they choose who supports them relative to older age groups.

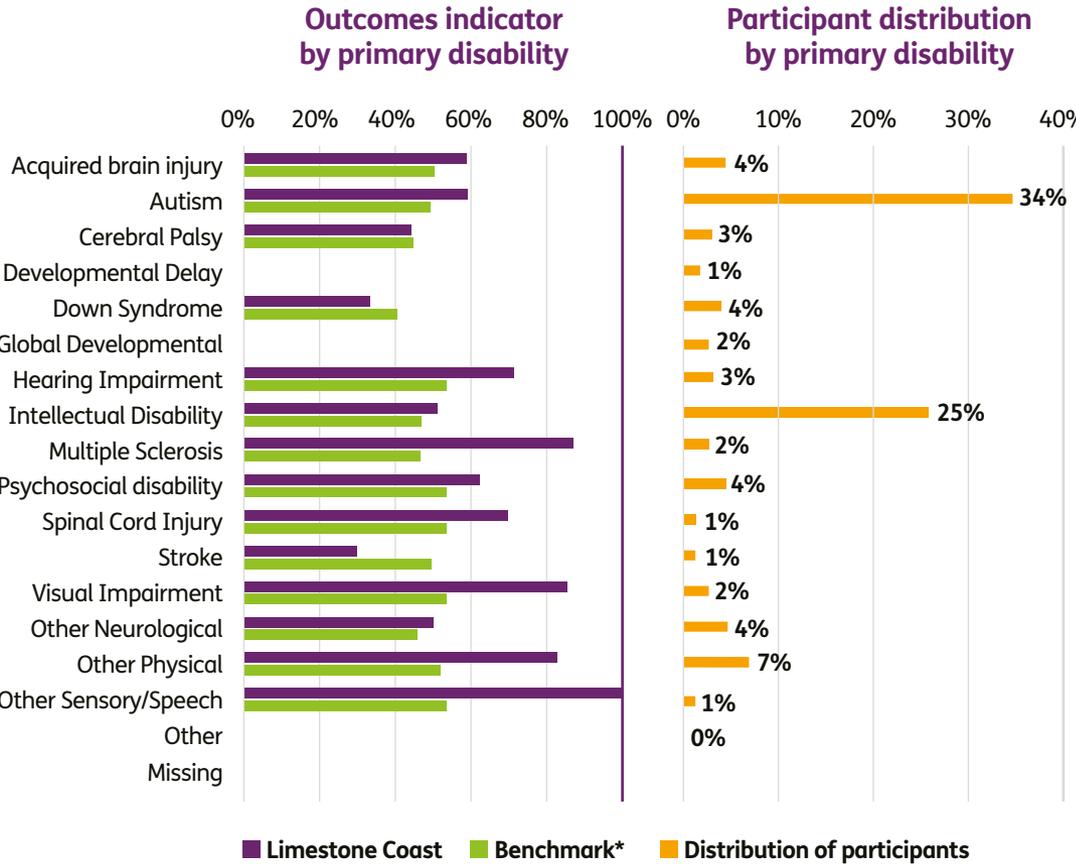
For age groups between 19 and 64 years of age, the outcomes indicator is above benchmark.

Note that the outcomes questionnaire for participants under 14 does not include the question: do you choose who supports you?

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants.

The outcomes indicator on choice and control being above benchmark is driven by participants with psychosocial disability and intellectual disability

Limestone Coast (SA): All support categories



The two major primary disability types in the Limestone Coast (SA) region were autism (34%) and intellectual disability (25%).

The outcomes indicator on choice and control for participants with autism combined with a number of primary disabilities with outcomes indicators notably higher than benchmark appear to drive the overall result.

*The benchmark is the national average, adjusted for the mix of SIL / SDA participants.

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