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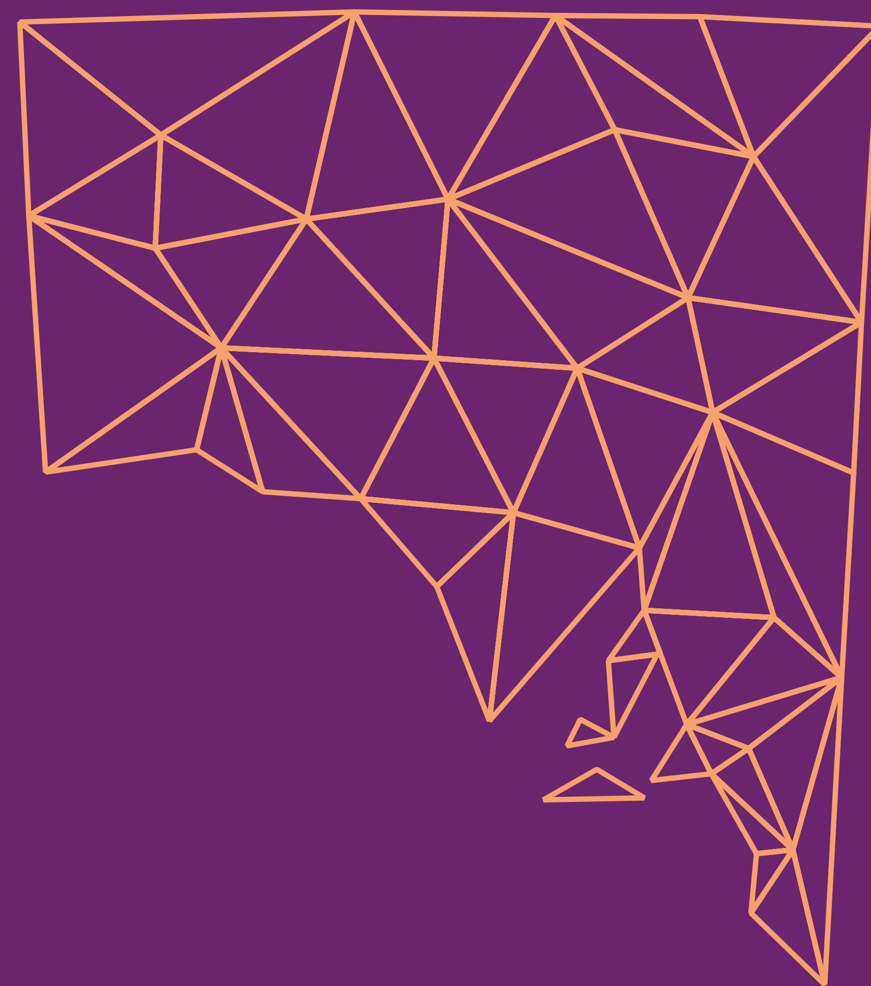

The NDIS market

South Australia

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

This report provides the latest update to the South Australia market report, using data as at 30 June 2020 (the previous report used data as at 31 December 2019). The report covers the key market metrics that the NDIA monitors across the 12 service districts within South Australia.

Accompanying this report is the 30 June 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 October 2019 to the 31 March 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 October 2019 to 31 March 2020, using data available as at 30 June 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 – South Australia

Service district	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
South Australia							
Adelaide Hills	1 Jul 13	1,215	34.88	28,705	24.71	20,341	71%
Barossa, Light and Lower North	1 Jul 13	1,617	37.30	23,065	24.11	14,908	65%
Eastern Adelaide	1 Jul 13	2,886	102.31	35,450	71.89	24,910	70%
Eyre and Western	1 Jul 13	1,004	32.40	32,273	17.11	17,037	53%
Far North (SA)	1 Jul 13	395	13.60	34,440	6.59	16,691	48%
Fleurieu and Kangaroo Island	1 Jul 13	888	28.69	32,307	18.97	21,367	66%
Limestone Coast	1 Jul 13	1,116	38.16	34,195	23.32	20,899	61%
Murray and Mallee	1 Jul 13	1,380	43.46	31,493	27.47	19,903	63%
Northern Adelaide	1 Jul 13	11,105	334.75	30,144	234.67	21,132	70%
Southern Adelaide	1 Jul 13	7,209	244.92	33,975	170.41	23,638	70%
Western Adelaide	1 Jul 13	2,940	95.64	32,530	67.06	22,810	70%
Yorke and Mid North	1 Jul 13	1,372	35.65	25,982	21.08	15,367	59%
South Australia total		**33,127**	**1,041.76**	**31,448**	**707.40**	**21,354**	**68%**
National total		**364,879**	**11,978.68**	**32,829**	**8,341.41**	**22,861**	**70%**

In the 30 June 2020 report, there were 33,127 active participants with approved plans registered in South Australia and 989 active providers. Total plan budgets in South Australia over the 6 months from 1 October 2019 to 31 March 2020 amounted to $1,042m. Total payments over the same period amounted to $707m. This gives a utilisation rate of 68%. In the 31 December 2019 report, the equivalent rate for South Australia was 67%, indicating a slight increase in utilisation.

Summary of market indicators
by service district – South 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?
South Australia							
Adelaide Hills	1 Jul 13	1,215	197	6.2	72%	52%	58%
Barossa, Light and Lower North	1 Jul 13	1,617	260	6.2	62%	58%	68%
Eastern Adelaide	1 Jul 13	2,886	406	7.1	53%	56%	73%
Eyre and Western	1 Jul 13	1,004	107	9.4	81%	62%	64%
Far North (SA)	1 Jul 13	395	72	5.5	87%	45%	51%
Fleurieu and Kangaroo Island	1 Jul 13	888	155	5.7	86%	59%	76%
Limestone Coast	1 Jul 13	1,116	118	9.5	82%	62%	55%
Murray and Mallee	1 Jul 13	1,380	182	7.6	75%	55%	70%
Northern Adelaide	1 Jul 13	11,105	627	17.7	46%	55%	66%
Southern Adelaide	1 Jul 13	7,209	485	14.9	66%	51%	64%
Western Adelaide	1 Jul 13	2,940	400	7.4	53%	56%	70%
Yorke and Mid North	1 Jul 13	1,372	178	7.7	64%	59%	65%
South Australia average		**2,761**	**266**	**8.7**	**69%**	**–**	**–**
South Australia total		**33,127**	**989**	**–**	**–**	**55%**	**66%**
National average		**4,559**	**465**	**9.2**	**60%**	**–**	**–**
National total		**364,879**	**10,740**	**–**	**–**	**51%**	**71%**

State-wide, 55% of respondent participants said that they chose who supported them and 66% said that the NDIS helped with choice and control. The comparative figures from the 31 December 2019 report were 53% and 62% respectively, indicating an improvement in responses.

Key indicators – South 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 Adelaide Hills (71%) and the lowest in Far North (48%). In the 31 December 2019 report, Adelaide Hills had a utilisation rate of 68% and Far North had a rate of 45% (and was the lowest district in South Australia). Overall, there has been an increase in utilisation rates in South Australia over the last 6 months.

Provider concentration:

The highest level of provider concentration was 87% in Far North and 86% in Fleurieu & Kangaroo Island and the lowest was 46% in Northern Adelaide. In the 31 December 2019 presentation, Far North and Fleurieu & Kangaroo Island were both at 85% (and have since worsened) and Northern Adelaide was at 47% (and has since improved).

Generally, the lower the concentration, the more competitive the market is likely to be – as payments are going to a range of different providers. As Northern Adelaide has been in the Scheme since inception and has the most participants and plan budgets out of all the South Australia districts, a low provider concentration can be expected.

The average across districts in South Australia is 69%, which is the same level it was at in the 31 December 2019 report. The national average across districts is 60%.

Key indicators – South Australia cont.

Outcomes indicator on choice and control:

In Eyre & Western and Limestone Coast, 62% of participants responded that they chose who supports them, however in Far North, 45% of participants responded that they had that choice. This compares to a national total of 51%.

In the 31 December 2019 report, Eyre & Western and Limestone Coast both showed the highest proportion of participants responding that they chose who supports them (60% and 59% respectively). Far North was the district with the lowest proportion with 43% of participants responding that they chose who supports them. The metric has increased across all three of these districts and the total in South Australia has increased by 2%.

Participants in Far North with poorer choice and control outcomes may thus benefit from increased choice (or information on their ability to choose).

Has the NDIS helped with choice and control?:

76% of participants in Fleurieu & Kangaroo Island (the highest proportion in the State) responded that the NDIS had helped with choice and control over support provision, compared with 51% in Far North (the lowest proportion in the State). The national total is 71%, indicating that participants in Far North may benefit from greater assistance from the NDIS in choosing their supports and services.

The response rate in Fleurieu & Kangaroo Island has not changed since the 31 December 2019 report. The response rate in Far North has increased by two percentage points since the 31 December 2019 report. The total response rate in South Australia has increased by four percentage points (from 62%).

Summary of market indicators
by support category – South 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	29,796	263	54%	22.88	768	9.94	334	43%	55%	66%
Daily Activities	29,484	343	54%	590.63	20,032	466.81	15,833	79%	55%	66%
Community	29,481	245	39%	143.12	4,855	65.95	2,237	46%	55%	66%
Transport	27,381	87	59%	17.36	634	15.04	549	87%	54%	66%
Core total	**30,135**	**536**	**49%**	**774.00**	**25,684**	**557.74**	**18,508**	**72%**	**55%**	**66%**
Capacity Building										
Choice and Control	16,311	106	69%	10.64	652	9.80	601	92%	55%	65%
Daily Activities	32,632	576	53%	151.27	4,636	80.28	2,460	53%	55%	66%
Employment	3,043	68	86%	19.53	6,417	14.41	4,736	74%	49%	70%
Health and Wellbeing	1,118	61	71%	1.41	1,265	0.42	372	29%	57%	70%
Home Living	119	7	100%	0.10	861	0.01	62	7%	56%	64%
Lifelong Learning	16	5	100%	0.04	2,359	0.01	638	27%	36%	80%
Relationships	2,225	84	56%	10.48	4,709	3.40	1,529	32%	10%	59%
Social and Civic	1,704	89	60%	4.22	2,475	0.89	521	21%	53%	68%
Support Coordination	12,254	195	34%	24.11	1,968	10.95	894	45%	44%	63%
Capacity Building total	**32,978**	**660**	**49%**	**221.80**	**6,726**	**120.17**	**3,644**	**54%**	**55%**	**66%**
Capital										
Assistive Technology	7,516	209	69%	30.92	4,113	21.46	2,856	69%	63%	67%
Home Modifications	2,463	51	84%	13.24	5,377	4.67	1,895	35%	27%	67%
Capital total	**8,690**	**224**	**62%**	**44.16**	**5,082**	**26.13**	**3,007**	**59%**	**54%**	**67%**
All support categories	**33,127**	**989**	**44%**	**1,041.76**	**31,448**	**707.40**	**21,354**	**68%**	**55%**	**66%**

This slide shows the breakdown of the market indicators by support category in South 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.
- Since the 31 December 2019 report, utilisation has improved across all support categories.

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 – South 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	2,247	116	72%	3.36	1,495	1.34	596	40%	12%	64%
Daily Activities	2,273	125	67%	316.82	139,385	288.46	126,908	91%	12%	64%
Community	2,241	130	59%	32.43	14,470	17.68	7,890	55%	12%	64%
Transport	2,250	56	67%	2.97	1,321	1.47	654	50%	12%	64%
Core total	**2,273**	**237**	**63%**	**355.58**	**156,436**	**308.95**	**135,923**	**87%**	**12%**	**64%**
Capacity Building										
Choice and Control	1,012	49	78%	0.63	627	0.56	551	88%	15%	60%
Daily Activities	2,250	222	49%	10.22	4,544	5.20	2,309	51%	12%	64%
Employment	499	28	96%	3.60	7,221	2.84	5,690	79%	14%	71%
Health and Wellbeing	188	13	99%	0.17	894	0.03	179	20%	14%	62%
Home Living	1	0	0%	0.00	873	0.00	0	0%	100%	0%
Lifelong Learning	1	2	100%	0.01	6,735	0.00	3,498	52%	0%	100%
Relationships	1,062	52	71%	4.49	4,231	1.32	1,247	29%	6%	64%
Social and Civic	65	10	100%	0.16	2,389	0.03	535	22%	15%	71%
Support Coordination	2,242	110	51%	5.89	2,629	2.26	1,008	38%	11%	64%
Capacity Building total	**2,273**	**284**	**51%**	**25.18**	**11,078**	**12.25**	**5,389**	**49%**	**12%**	**64%**
Capital										
Assistive Technology	906	60	90%	4.03	4,444	2.94	3,243	73%	14%	62%
Home Modifications	1,780	18	96%	10.96	6,156	3.20	1,796	29%	11%	65%
Capital total	**1,971**	**72**	**84%**	**14.98**	**7,602**	**6.14**	**3,113**	**41%**	**12%**	**64%**
All support categories	**2,273**	**424**	**60%**	**396.25**	**174,329**	**328.36**	**144,461**	**83%**	**12%**	**64%**

This slide shows the breakdown of the market indicators by support category in South Australia, for participants with Supported Independent Living (SIL) and / or Specialist Disability Accommodation (SDA) supports.

- Daily Activities (Core) supports are the supports with the highest level of committed supports and payments. Provider concentration is relatively low for these supports indicating a competitive market amongst providers exists.
- 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 – South 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	27,549	243	52%	19.52	709	8.60	312	44%	62%	67%
Daily Activities	27,211	325	56%	273.81	10,063	178.35	6,554	65%	61%	67%
Community	27,240	238	37%	110.70	4,064	48.27	1,772	44%	61%	67%
Transport	25,131	75	64%	14.39	573	13.57	540	94%	61%	67%
Core total	**27,862**	**507**	**50%**	**418.42**	**15,018**	**248.79**	**8,929**	**59%**	**62%**	**67%**
Capacity Building										
Choice and Control	15,299	106	69%	10.01	654	9.25	604	92%	60%	66%
Daily Activities	30,382	559	54%	141.05	4,643	75.08	2,471	53%	62%	67%
Employment	2,544	67	84%	15.92	6,260	11.57	4,549	73%	56%	70%
Health and Wellbeing	930	58	70%	1.25	1,340	0.38	411	31%	68%	72%
Home Living	118	7	100%	0.10	861	0.01	62	7%	56%	64%
Lifelong Learning	15	3	100%	0.03	2,068	0.01	447	22%	40%	78%
Relationships	1,163	75	56%	5.98	5,145	2.08	1,787	35%	19%	49%
Social and Civic	1,639	86	60%	4.06	2,478	0.85	521	21%	55%	68%
Support Coordination	10,012	190	34%	18.22	1,820	8.69	868	48%	54%	63%
Capacity Building total	**30,705**	**637**	**50%**	**196.62**	**6,404**	**107.92**	**3,515**	**55%**	**62%**	**66%**
Capital										
Assistive Technology	6,610	199	66%	26.89	4,068	18.52	2,802	69%	73%	68%
Home Modifications	683	38	78%	2.29	3,347	1.47	2,153	64%	77%	70%
Capital total	**6,719**	**204**	**64%**	**29.17**	**4,342**	**19.99**	**2,976**	**69%**	**73%**	**68%**
All support categories	**30,854**	**948**	**47%**	**645.51**	**20,922**	**379.04**	**12,285**	**59%**	**62%**	**66%**

This slide shows the breakdown of the market indicators by support category in South Australia, for participants without Supported Independent Living (SIL) and / or Specialist Disability Accommodation (SDA) supports.

- The position is similar to that shown on Slide 8 – the majority (93%) of participants in South Australia do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the South Australian 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.

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