ndis

The NDIS market
Northern Territory
31 December 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 assist with achieving their goals. Participants receive individual budgets from which they choose the providers to support them.

This presentation provides the latest update to the Northern Territory market presentation, using data as at 31 December 2020 (the previous presentation used data as at 30 June 2020), The presentation covers the key market metrics that the NDIA monitors across the 6 service districts within Northern Territory.

Accompanying this presentation is the 31 December 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 April 2020 to the 30 September 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 April 2020 to 30 September 2020, using data available as at 31 December 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 – Northern Territory

Service district	Phase in date	Active participants with approved plans	Total plan budgets ($m)	Average plan budget ($)	Total payments ($m)	Average payments ($)	Utilisation
Northern Territory							
Barkly	1 Jul 14	161	8.99	55,826	5.12	31,790	57%
Central Australia	1 Jul 17	551	60.01	108,903	42.91	77,873	72%
Darwin Remote	1 Jul 17	352	15.78	44,820	5.97	16,948	38%
Darwin Urban	1 Jan 17	2,113	130.84	61,919	92.53	43,793	71%
East Arnhem	1 Jan 17	187	12.11	64,774	4.57	24,430	38%
Katherine	1 Jul 17	177	15.66	88,455	11.03	62,336	70%
Northern Territory total		**3,631**	**247.75**	**68,233**	**164.85**	**45,400**	**67%**
National total		**412,543**	**14,645.49**	**35,501**	**9,871.32**	**23,928**	**67%**

In the 31 December 2020 report, there were 3,631 active participants with approved plans registered in Northern Territory and 294 active providers[1]. In the 31 December 2020 report, total plan budgets in Northern Territory over the 6 months from 1 April 2020 to 30 September 2020 amounted to $248m. Total payments over the same period amounted to $165m, resulting in a utilisation rate of 67%. The utilisation rate for Northern Territory increased by two percentage points from 65% in the 30 June 2020 report.

[1] Providers of agency-managed participants only. Self-managed participants and participants with a plan manager can use unregistered providers, and hence the total number of providers supporting participants will be higher than 294.

Summary of market indicators
by service district – Northern Territory 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?
Northern Territory							
Barkly	1 Jul 14	161	45	3.6	92%	67%	69%
Central Australia	1 Jul 17	551	116	4.8	85%	37%	63%
Darwin Remote	1 Jul 17	352	53	6.6	76%	36%	34%
Darwin Urban	1 Jan 17	2,113	196	10.8	60%	42%	74%
East Arnhem	1 Jan 17	187	46	4.1	84%	45%	34%
Katherine	1 Jul 17	177	67	2.6	88%	27%	81%
Northern Territory average		**590**	**87**	**5.4**	**81%**	**–**	**–**
Northern Territory total		**3,631**	**294**	**–**	**–**	**40%**	**64%**
National average		**5,154**	**471**	**10.3**	**59%**	**–**	**–**
National total		**412,543**	**9,969**	**–**	**–**	**52%**	**72%**

State-wide, 40% of respondent participants said that they chose who supported them and 64% said that the NDIS helped with choice and control. The comparative figures from the 30 June 2020 report were 38% and 63% respectively, indicating a small improvement in responses.

Key indicators
Northern Territory

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 Central Australia (72%) and the lowest in East Arnhem and Darwin Remote (both at 38%). In the 30 June 2020 report, the highest level of utilisation was seen in Katherine (71%) and the lowest in East Arnhem (33%). Participants may benefit from NDIS assistance to raise the levels of utilisation in East Arnhem, particularly given the district's low score on the 'Has the NDIS helped with choice and control' indicator (34%). Overall utilisation in Northern Territory is the same as the national total (at 67%), compared to the five percentage points gap from the national total in the 30 June 2020 report.

Provider concentration:

Average provider concentration (across districts) in Northern Territory (81%) is substantially higher than the national average across districts (59%). However, provider concentration in Northern Territory has decreased by three percentage points from 84% in the 30 June 2020 report. The highest concentration is in Barkly (92%) and the lowest in Darwin Urban (60%). Since the 30 June 2020 report, only provider concentration in Darwin Remote increased (from 74% to 76%) while all other districts experienced a decrease in provider concentration. The largest decrease occurred in East Arnhem (from 91% to 84%). Generally, the lower the concentration, the more competitive the market is likely to be – as payments are going to a range of different providers.

Key indicators
Northern Territory cont.

Outcomes indicator on choice and control:

In Barkly, 67% of participants responded that they chose who supports them, however in Katherine, only 27% of participants responded that they had that choice. This compares to a national total of 52% (from 51% in the 30 June 2020 report). Participants in districts with a lower level on the outcomes indicator may thus benefit from increased choice (or information on their ability to choose). Since the 30 June 2020 report, Barkly remained the same (at 67%) and Katherine improved (from 23% to 27%).

Has the NDIS helped with choice and control?:

81% of participants in Katherine responded that the NDIS had helped with choice and control over support provision, compared with 34% in Darwin Remote and East Arnhem (the lowest from the states). The national total is 72%, indicating that participants in Darwin Remote and East Arnhem may benefit from greater assistance from the NDIS in choosing their supports and services.

Since the 30 June 2020 report, Katherine improved by two percentage points (from 79% to 81%). Both Darwin Remote and East Arnhem remained at 34% as in the 30 June 2020 report. The national total increased by one percentage point from 71% in the 30 June 2020 report.

Summary of market indicators
by support category – Northern Territory

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	3,510	109	72%	3.27	933	1.44	409	44%	40%	64%
Daily Activities	3,509	108	63%	139.87	39,861	115.17	32,821	82%	40%	64%
Community	3,509	87	58%	38.15	10,872	18.57	5,291	49%	40%	64%
Transport	3,503	38	74%	3.76	1,072	3.05	870	81%	40%	64%
Core total	**3,510**	**183**	**61%**	**185.06**	**52,722**	**138.22**	**39,379**	**75%**	**40%**	**64%**
Capacity Building										
Choice and Control	1,972	51	79%	1.58	804	1.29	653	81%	44%	61%
Daily Activities	3,603	126	62%	29.61	8,218	11.43	3,172	39%	40%	64%
Employment	395	19	93%	1.97	4,988	0.51	1,297	26%	38%	62%
Health and Wellbeing	155	10	100%	0.24	1,574	0.05	321	20%	42%	70%
Home Living	51	3	100%	0.05	883	0.00	66	7%	58%	50%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	453	24	89%	3.75	8,284	1.11	2,442	29%	10%	67%
Social and Civic	1,079	55	60%	5.17	4,787	1.23	1,138	24%	37%	55%
Support Coordination	2,780	90	66%	11.87	4,269	8.13	2,926	69%	39%	64%
Capacity Building total	**3,616**	**191**	**46%**	**54.24**	**14,999**	**23.75**	**6,568**	**44%**	**40%**	**64%**
Capital										
Assistive Technology	1,027	65	85%	6.73	6,554	2.31	2,253	34%	52%	70%
Home Modifications	288	18	94%	1.73	5,996	0.56	1,950	33%	39%	68%
Capital total	**1,094**	**69**	**82%**	**8.46**	**7,731**	**2.88**	**2,629**	**34%**	**48%**	**70%**
All support categories	**3,631**	**294**	**55%**	**247.75**	**68,233**	**164.85**	**45,400**	**67%**	**40%**	**64%**

This slide shows the breakdown of the market indicators by support category in the Northern Territory.

- Daily Activities (Core and Capacity Building) and Community supports are the supports with the highest level of committed supports and payments. Provider concentration is relatively low for these supports indicating that there may currently be sufficient providers for a competitive market.
- The largest growth in providers is seen for 'Capacity Building – Choice and Control' supports, which may be an area of increasing demand.
- The increase in overall utilisation since the 30 June 2020 report is driven by Core – Daily Activities, which increased from 79% to 82%, and makes up a large majority of plan budgets and payments.

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 – Northern Territory – 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	372	54	84%	0.67	1,799	0.28	754	42%	8%	71%
Daily Activities	372	52	77%	86.00	231,189	79.77	214,436	93%	8%	71%
Community	372	57	72%	14.44	38,816	8.31	22,341	58%	8%	71%
Transport	372	15	94%	0.55	1,484	0.18	475	32%	8%	71%
Core total	**372**	**95**	**76%**	**101.66**	**273,288**	**88.54**	**238,006**	**87%**	**8%**	**71%**
Capacity Building										
Choice and Control	110	18	89%	0.09	857	0.07	612	71%	11%	72%
Daily Activities	371	68	67%	3.08	8,311	1.35	3,649	44%	8%	71%
Employment	59	4	100%	0.40	6,772	0.16	2,661	39%	7%	74%
Health and Wellbeing	32	2	100%	0.04	1,333	0.00	60	4%	6%	53%
Home Living	3	0	0%	0.01	1,759	0.00	0	0%	33%	100%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	193	16	97%	1.84	9,553	0.63	3,278	34%	3%	69%
Social and Civic	113	19	92%	0.66	5,802	0.13	1,186	20%	5%	64%
Support Coordination	372	40	85%	2.36	6,334	2.02	5,443	86%	8%	71%
Capacity Building total	**372**	**100**	**56%**	**8.48**	**22,798**	**4.37**	**11,751**	**52%**	**8%**	**71%**
Capital										
Assistive Technology	158	20	98%	1.08	6,852	0.51	3,225	47%	11%	72%
Home Modifications	135	3	100%	0.93	6,876	0.06	439	6%	2%	64%
Capital total	**218**	**22**	**97%**	**2.01**	**9,225**	**0.57**	**2,609**	**28%**	**8%**	**70%**
All support categories	**372**	**147**	**72%**	**112.15**	**301,491**	**93.48**	**251,287**	**83%**	**8%**	**71%**

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

- Daily Activities (Core) supports have the highest level of committed supports and payments. Provider concentration is high for these supports, but is lower than many other support categories, indicating that at the State level the market amongst providers has little competitiveness, although given the small number of participants and providers, this is to be expected.
- 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 – Northern Territory – 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	3,138	102	75%	2.61	830	1.16	368	44%	48%	62%
Daily Activities	3,137	101	63%	53.87	17,173	35.40	11,284	66%	48%	62%
Community	3,137	84	56%	23.71	7,559	10.26	3,269	43%	48%	62%
Transport	3,131	36	80%	3.20	1,023	2.87	917	90%	48%	62%
Core total	**3,138**	**172**	**59%**	**83.39**	**26,575**	**49.68**	**15,832**	**60%**	**48%**	**62%**
Capacity Building										
Choice and Control	1,862	50	79%	1.49	800	1.22	656	82%	47%	59%
Daily Activities	3,232	117	64%	26.53	8,207	10.08	3,117	38%	48%	62%
Employment	336	19	91%	1.57	4,674	0.36	1,058	23%	43%	59%
Health and Wellbeing	123	9	100%	0.20	1,637	0.05	389	24%	54%	79%
Home Living	48	3	100%	0.04	828	0.00	70	8%	60%	48%
Lifelong Learning	0	0	0%	0.00	0	0.00	0	0%	0%	0%
Relationships	260	21	90%	1.91	7,343	0.47	1,821	25%	19%	63%
Social and Civic	966	51	61%	4.51	4,668	1.09	1,132	24%	42%	53%
Support Coordination	2,408	88	62%	9.51	3,949	6.11	2,537	64%	46%	61%
Capacity Building total	**3,244**	**181**	**49%**	**45.76**	**14,105**	**19.38**	**5,974**	**42%**	**48%**	**62%**
Capital										
Assistive Technology	869	57	85%	5.65	6,500	1.80	2,077	32%	62%	69%
Home Modifications	153	16	97%	0.80	5,220	0.50	3,283	63%	76%	76%
Capital total	**876**	**59**	**84%**	**6.45**	**7,359**	**2.31**	**2,634**	**36%**	**62%**	**70%**
All support categories	**3,259**	**274**	**51%**	**135.60**	**41,607**	**71.37**	**21,899**	**53%**	**48%**	**62%**

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

- The results are similar to the results when all participants are considered (slide 8) – the majority (90%) of participants in Northern Territory do not have SIL or SDA supports, so the patterns of support category spending is similar to that of the Northern Territory 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.

www.ndis.gov.au