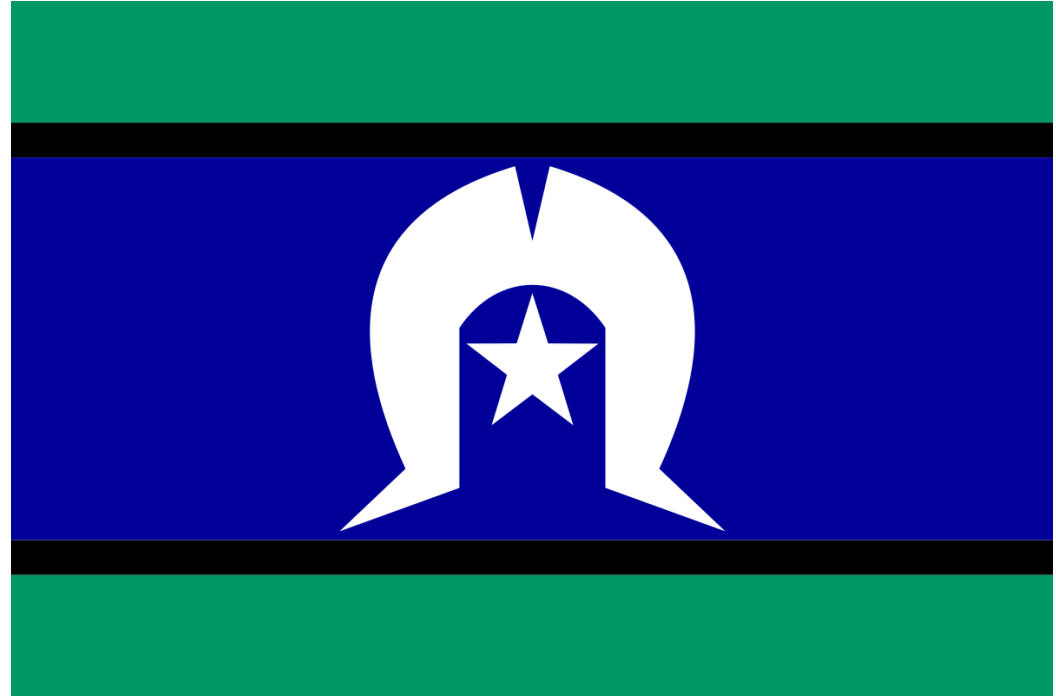


Understanding the market

NDIS Success Roadmap – webinar two

Acknowledgement of Country



Welcome to Understanding the market

The NDIS Success Roadmap



- ▶ Q&A on Tuesday 18 August 2020
- ▶ Join the NDIS Success Facebook Group
- ▶ Refer to the Business plan template
- ▶ Fill in questions in the activity worksheet

Previous topic's wrap-up

- ▶ Webinar 1 : Success in the NDIS
 - Brief history of the NDIS
 - The NDIS – who gets access?
 - The NDIS Plan – what is funded?
 - The NDIS Plan – how is the money managed?

Today's webinar

- ▶ What we'll cover in today's webinar:
 1. Competencies (what you do)
 2. Customers – who are your current customers?
 3. Customers – new customers and markets
 4. Competitor analysis
 5. What are your opportunities?

- ▶ This webinar will help you complete section 2 of the activity worksheet

Competencies

Competencies

- ▶ What are the organisation's current strengths and weaknesses?
- ▶ Take a look at your organisation:
 - What are you good at?
 - What is working well?
 - What is not working well?

Competencies

- ▶ Out of the strengths:
 - Which of these are critical competencies?
 - Which are support competencies?
 - What sets your organisation apart? (differentiators)
- ▶ Of the weaknesses:
 - Are any holding you back from delivering effective or efficient services?
 - Which need to be addressed and in what priority?

Customers - who are your current customers?

Customers - who are your current customers?

- ▶ Describe the people you support at the moment. Think about the:
 - Nature of disability
 - Support needs as a result of their disability
 - Age spectrum
 - Locations you serve (your markets)
 - Services they need
 - Unique requirements of particular segments - e.g. Aboriginal or Torres Straight Islanders, CALD

Customers - who are your current customers?

- ▶ Brainstorm a summary of:
 - How many customers you have
 - What services are you providing?
 - What markets are you in? e.g. location and nature of disability
- ▶ What do your existing customers say about you?
- ▶ What does choice & control mean for your business – consumer choice re service provision

Customers - new clients and markets

Customers - identifying new markets

- ▶ Where are new clients that you can bring to your organisation?
What is their financial value?
- ▶ Best source of data is to look at the NDIS website
- ▶ Segmenting the market:
 - Needs
 - Location
 - Who you can help short/medium/long term
- ▶ CBB can help you complete a market scan and look for new opportunities

Current NDIS marketplace

- ▶ 370,000 active participants nationally including:
 - 6.2% Aboriginal and Torres Strait Islanders
 - 9.1% culturally and linguistically diverse participants
- ▶ 14,534 NDIS registered providers including:
 - 9,746 providers were active in the last quarter
 - 3,564 of the active providers were sole traders
- ▶ About 85-50% of payments are going to the top 25% of providers
- ▶ 69% of plans are being utilised nationally

NDIS Marketplace - remoteness

Table E.11 Participant profile per quarter by remoteness – National ^{20 21}

Participant profile	Prior Quarters		2019-20 Q3		Total	
	N	%	N	%	N	%
Major cities	226,245	67.1%	18,698	68.2%	244,943	67.2%
Population > 50,000	37,464	11.1%	2,979	10.9%	40,443	11.1%
Population between 15,000 and 50,000	29,520	8.8%	2,210	8.1%	31,730	8.7%
Population between 5,000 and 15,000	15,732	4.7%	1,110	4.0%	16,842	4.6%
Population less than 5,000	23,666	7.0%	1,893	6.9%	25,559	7.0%
Remote	2,871	0.9%	289	1.1%	3,160	0.9%
Very Remote	1,762	0.5%	230	0.8%	1,992	0.5%
Missing	193		17		210	
Total	337,453	100%	27,426	100%	364,879	100%

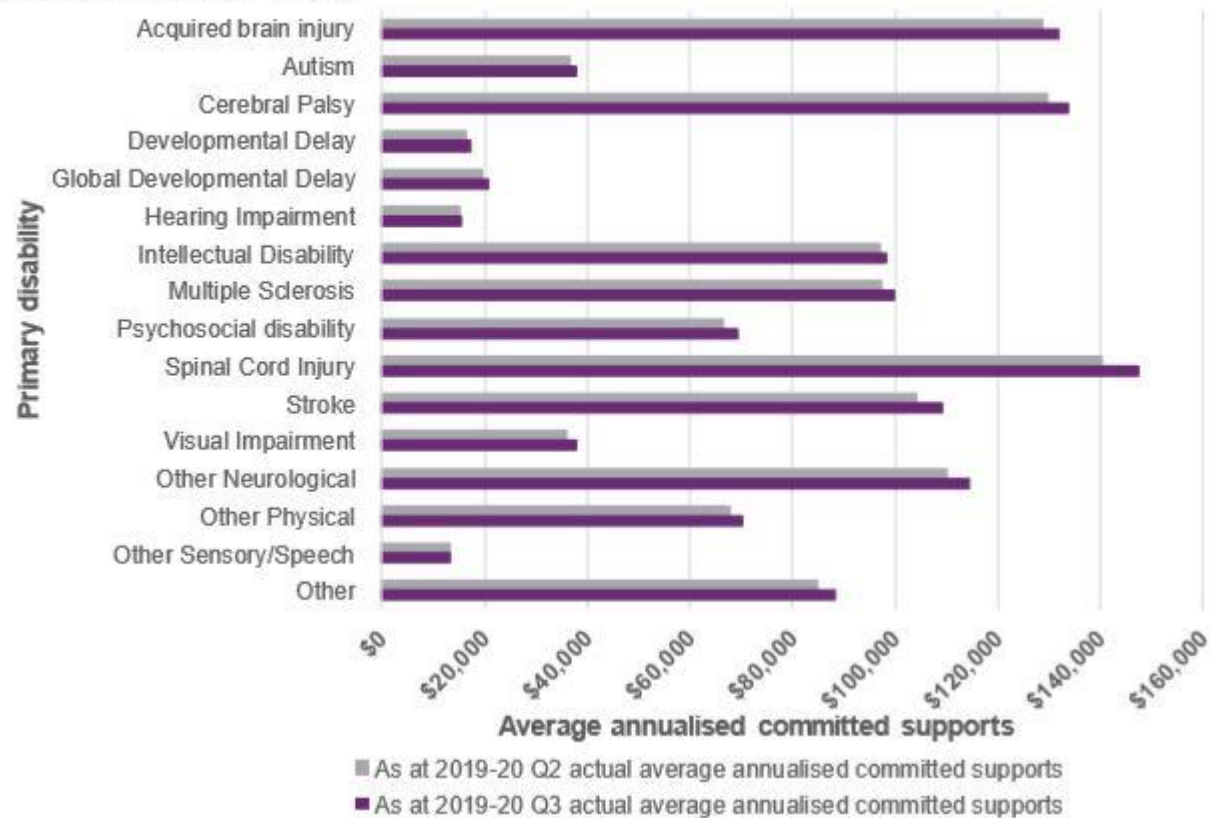
NDIS Marketplace - disability groups

Table E.12 Participant profile per quarter by disability group – National ^{23 24}

Disability	Prior Quarters		2019-20 Q3		Total	
	N	%	N	%	N	%
Autism	105,508	31%	7,962	29%	113,470	31%
Intellectual Disability	78,900	23%	2,898	11%	81,798	22%
Psychosocial disability	30,755	9%	3,455	13%	34,210	9%
Developmental Delay	18,986	6%	4,124	15%	23,110	6%
Hearing Impairment	15,175	4%	2,356	9%	17,531	5%
Other Neurological	15,072	4%	1,276	5%	16,348	4%
Other Physical	14,337	4%	1,554	6%	15,891	4%
Cerebral Palsy	14,580	4%	412	2%	14,992	4%
ABI	11,329	3%	781	3%	12,110	3%
Visual Impairment	7,677	2%	428	2%	8,105	2%
Multiple Sclerosis	6,711	2%	385	1%	7,096	2%
Global Developmental Delay	5,922	2%	906	3%	6,828	2%
Stroke	4,697	1%	464	2%	5,161	1%
Spinal Cord Injury	4,226	1%	240	1%	4,466	1%
Other Sensory/Speech	3,001	1%	110	0%	3,111	1%
Other	577	0%	75	0%	652	0%
Total	337,453	100%	27,426	100%	364,879	100%

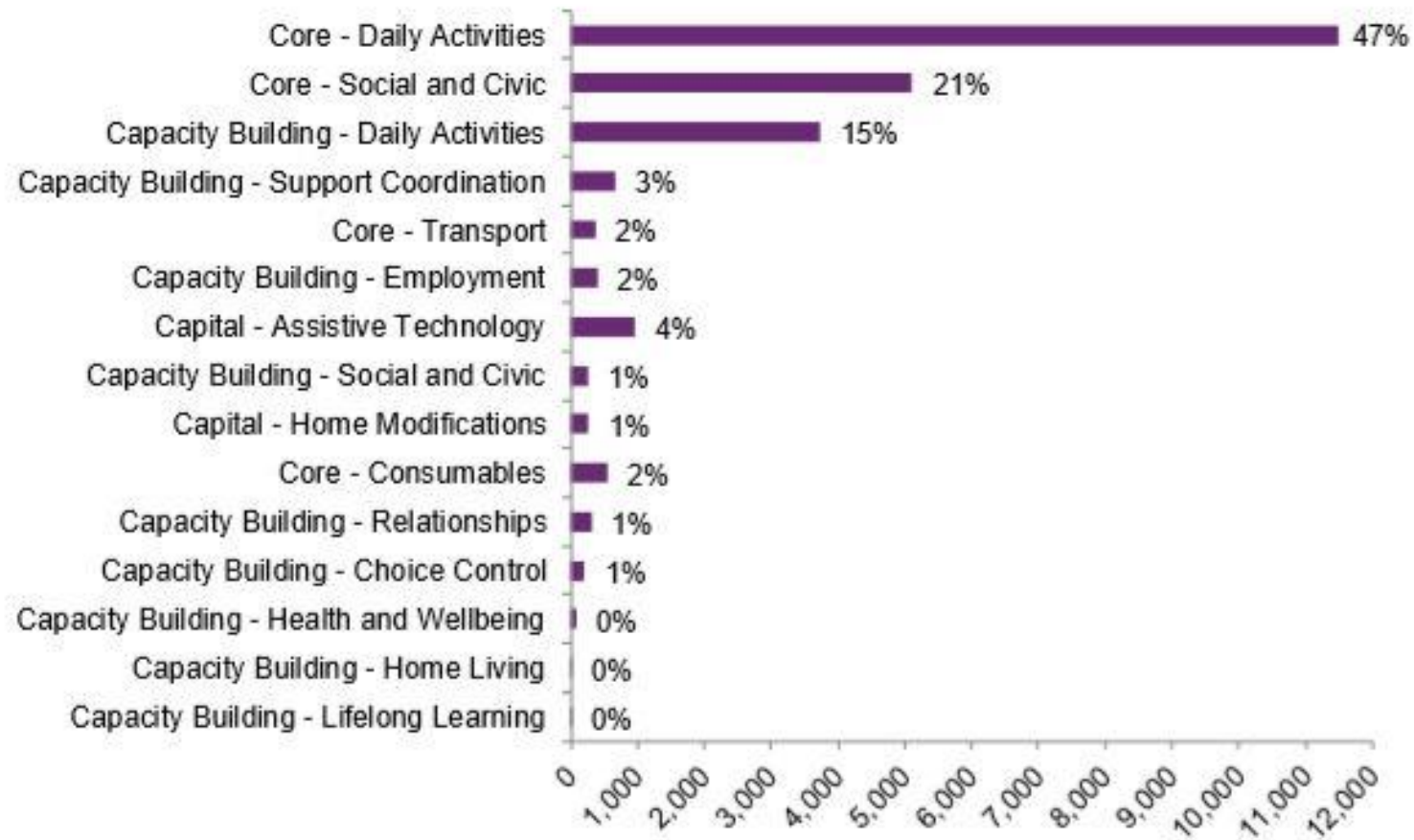
NDIS Marketplace - plan value by disability group

Figure E.22 Average committed support by primary disability group (including participants with Supported Independent Living supports) – active participants with initial plan approvals as at 2019-20 Q3 compared with active participants with initial plan approvals as at 2019-20 Q2 – National



NDIS Marketplace - support category

Figure E.24 Total annualised committed supports for active participants with an approved plan by support category (\$m) – National



NDIS Marketplace - gender

Table E.15 Participant profile per quarter by gender – National

Gender	Prior Quarters		2019-20 Q3		Total	
	N	%	N	%	N	%
Male	209,253	62%	16,609	61%	225,862	62%
Female	124,511	37%	10,455	38%	134,966	37%
Other	3,689	1%	362	1%	4,051	1%
Total	337,453	100%	27,426	100%	364,879	100%

NDIS Marketplace - form of financial management

Table E.52 Distribution of active participants by method of Financial Plan Management and quarter of plan approval – National

56 57

	Prior Quarters	2019-20 Q3	Total
Self-managed fully	19%	20%	19%
Self-managed partly	12%	12%	12%
Plan managed	35%	43%	38%
Agency managed	35%	25%	32%
Total	100%	100%	100%

NDIS Marketplace - support coordination

Table E.54 Distribution of active participants by support coordination and quarter of plan approval – National ⁶⁰

	Prior Quarters	2019-20 Q3	Total
Support coordination	38%	42%	39%

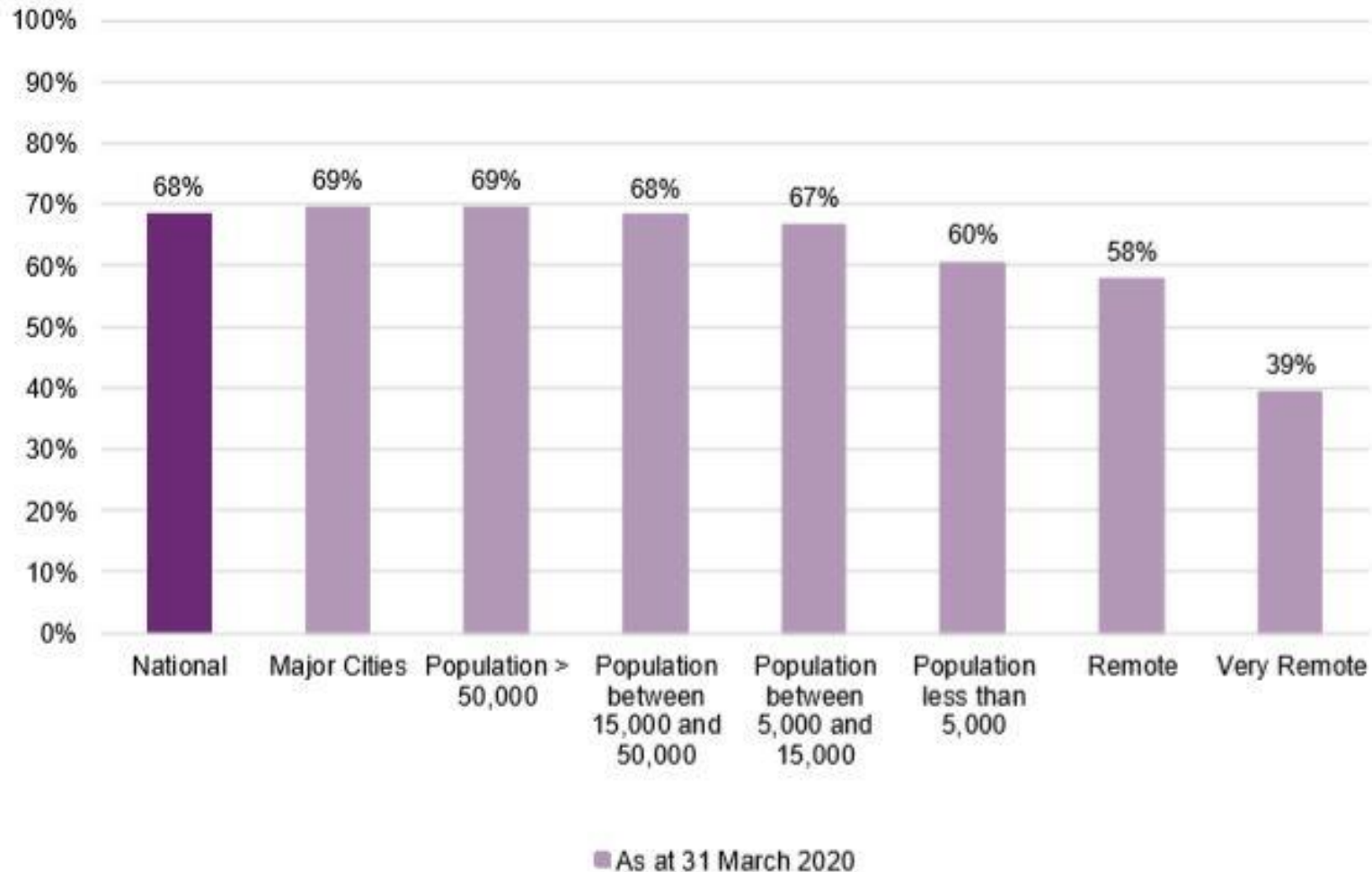
NDIS Marketplace - plan utilisation

Table E.59 Distribution of plans by plan utilisation for 2016-17, 2017-18 and 2018-19 – National ^{60 61}

Plan utilisation	Total
0 to 50%	38%
50% to 75%	24%
> 75%	38%
Total	100%

NDIS Marketplace - utilisation by remoteness

Figure E.29 Utilisation of committed supports by remoteness from 1 July 2019 to 31 December 2019 – National ⁷¹



NDIS Marketplace - low utilisation regions

- ▶ Regions >10% below the national average utilisation:

Darwin Remote (NT)

East Arnhem (NT)

Katherine (NT)

- ▶ Regions 5-10% below the national average utilisation:

North Sydney (NSW)

South Eastern Sydney
(NSW)

South Western Sydney
(NSW)

Sydney (NSW)

Western Sydney (NSW)

Brimbank Melton (VIC)

Inner East Melbourne (VIC)

Southern Melbourne (VIC)

Far North (SA)

Tas South East (TAS)

Central Australia (NT)

Darwin Urban (NT)

Goldfields-Esperance (WA)

North Metro (WA)

Data as at 31 March 2020

Worked example - psychosocial disability

- ▶ Average plan value \$65,000 nationally
- ▶ 27,848 people across Australia = \$1.8B total services
- ▶ In the NT: 281 people at \$150,000 = \$42M total services
- ▶ Also within the NT:
 - 74% of NDIS plans have support coordination
 - 58% of NDIS plans are less than 50% utilised
 - Utilisation in very remote areas is 33%

Customers - analysing data

- ▶ What data is available? e.g. NDIS quarterly reports, Census data, BLCW data, peak bodies
- ▶ How many customers are potentially out there? What services are you providing?

Customers - market research

- ▶ What do your existing customers say?
- ▶ What do potential customers say?
- ▶ How can you test your ideas?

Competitor analysis

Competitor analysis

- ▶ NDIS data on number of providers by size of client group
- ▶ Who are your competitors? Pick the top three...
- ▶ What support do they provide to people you work with?
- ▶ What do they do better than you?
- ▶ What does the competitor analysis tell you about:
 - New locations you want to enter
 - New services you want to provide
 - How you can be more effective when competing against them?

Example - competitor analysis matrix

ABC Incorporated works with people with visual impairment with four offices across the NT

Competitor name	Where do they operate?	Who is their target market?	What services do they offer?	What else do we know about them?	How does their value proposition compare to ours?
Big corporate	Darwin and other state capital cities	People with visual impairment	Support with daily activities	Strong financials and good marketing	Only available in Darwin; not in remote areas
Joe Bloggs sole trader	Katherine	People with visual impairment and some other disabilities	Support with daily activities	Limited capacity to expand or grow	Able to service other remote locations

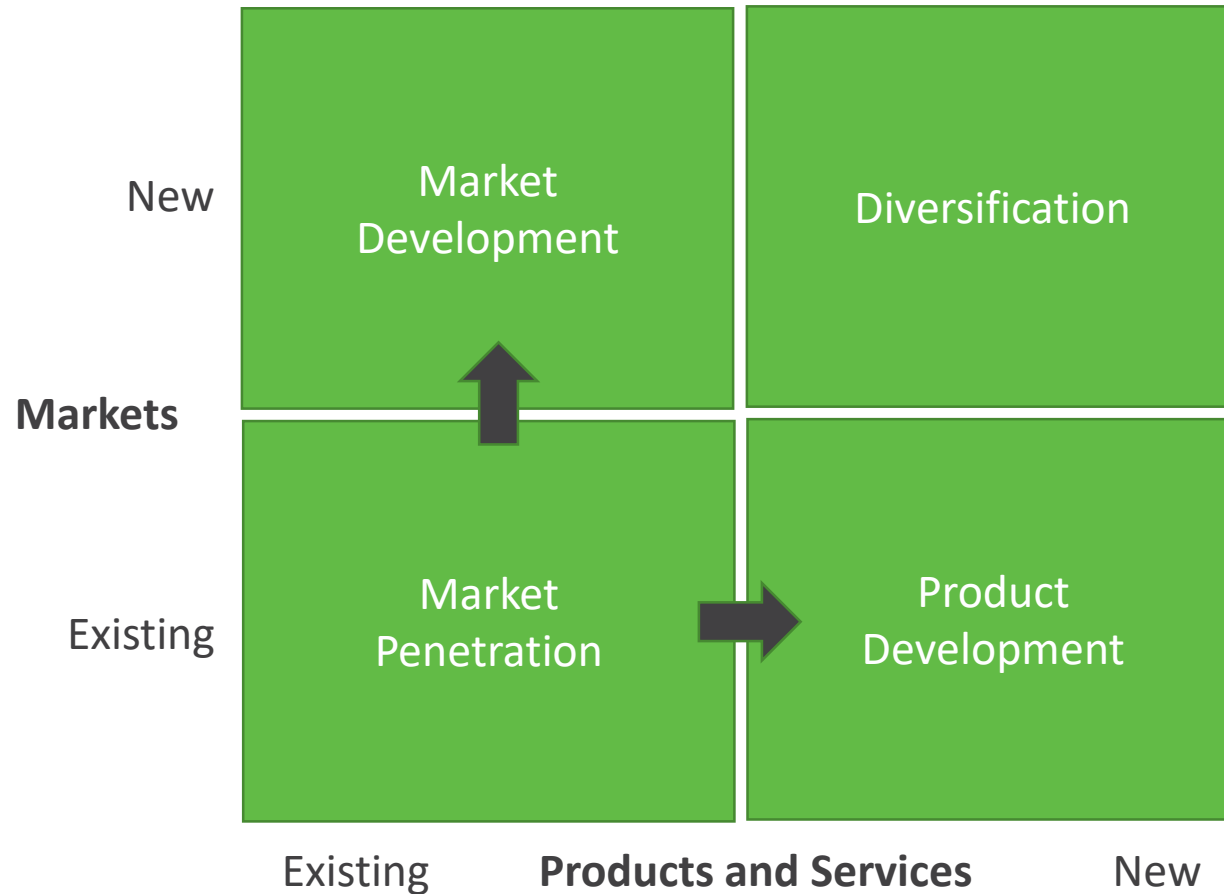
What are your opportunities?

Where do you see yourself in the future?

Services gaps and market opportunities

- ▶ Where is there:
 - Need and demand in your area for new services?
 - Unmet demand in other areas?
- ▶ What does the data tell you about the gaps and needs?
- ▶ How will you prioritise which of these gaps to work on first?

Customers - new clients and markets



Extension - talking with stakeholders

- ▶ You can talk to your customers, potential customers and their carers about the services that they would like, but can't access.
 - What does the future state of our company look like?
 - What do they expect you to do?
 - What is important to them?
 - What are the crucial values that form the foundation for the services?

Summary of today's webinar

- ▶ Summary of key areas/points covered:
 1. Competencies
 2. Customers – who are your current customers?
 3. Customers – new customers and markets
 4. Competitor analysis
 5. Service gaps and market opportunities
- ▶ Refer to relevant sections of business plan template and the toolkit for exercises and resources

Things to do next...

- ▶ Review the questions in the activity worksheet and the Business plan template
- ▶ Visit the NDIS Success Toolkit
- ▶ Visit the Facebook group
- ▶ The Q&A will available on 25 August

Next time



- ▶ What we'll cover:
 1. What service you will provide
 2. Designing that service
- ▶ This webinar will help you complete section 3C of the Business plan template

Thank you



Andrew Ellis

Business Consultant

ndis@cbb.com.au

cbb.com.au