

Mirus Industry Analysis October 2025

Under embargo until 16.10.25

Total care time decreased from August to September, however RN time increased, with total time falling by -0.13% and RN time increasing by 0.87%. The sector is now delivering, on average, 8.75 minutes more than the 215-minute target. Average Daily Subsidy remains stable as slight declines in the most recent month are backfilled over the following weeks with reassessments that are backdated. And occupancy had the largest single month increase since February, jumping by 0.29% in September.

Workforce	Aug-25	Sep-25	Change
Care Minutes (PRPD)	224.05	223.75	-0.13%
RN Minutes	45.74	46.14	0.87%
EN Minutes	6.62	6.70	1.21%
AIN Minutes	171.69	170.92	-0.45%
Allied Health	9.48	10.17	7.21%
DT/AO	5.78	6.18	6.91%
Non Care Minutes (Hospitality)	48.03	49.10	2.22%

The large increase in occupancy was fuelled by a 41.78% increase in permanent admissions from August to September and a 17.02% increase in respite bed days. Only 88 homes increased their room pricing in September, which is far fewer than the monthly average since January (213).

When analysing ADS and claiming activity, the more recent month is always artificially lower due to the nature of reassessment requests, which are typically uplifts, being backdated several weeks to their effective date. We see a month's average funding rise through the following two months as uplift requests that were made in the initial month are actioned. This also applies to the measurement of 'Days from Request to Reassessment'.

	Aug-25	Sep-25	Change
ADS			
Industry	\$301.08	\$300.97	-\$0.11
MM 1	\$297.63	\$297.56	-\$0.07
MM 2-3	\$306.75	\$306.47	-\$0.28
MM 4-5	\$316.24	\$316.34	\$0.10

	Aug-25	Sep-25	Change
Claiming Activity			
Industry	7.55%	6.78%	-0.76%
MM 1	7.54%	6.76%	-0.78%
MM 2-3	7.45%	6.89%	-0.56%
MM 4-5	7.75%	6.70%	-1.05%

	Aug-25	Sep-25	Change
Voluntary Claiming			
Industry	5.23%	4.55%	-0.68%
MM 1	5.28%	4.64%	-0.63%
MM 2-3	4.82%	4.35%	-0.47%
MM 4-5	5.65%	4.30%	-1.35%

	Aug-25	Sep-25	Change
AN-ACC Age			
Industry	44.83%	45.50%	0.67%
MM 1	44.33%	45.17%	0.85%
MM 2-3	45.19%	45.79%	0.60%
MM 4-5	59.57%	59.94%	0.37%

	Aug-25	Sep-25	Change
Days from Request to Reassessment			
Industry	20.29	18.01	-11.25%
MM 1	19.04	16.37	-14.04%
MM 2-3	23.45	21.66	-7.64%
MM 4-5	24.03	22.84	-4.93%

	Aug-25	Sep-25	Change
Occupancy			
Industry	92.07%	92.36%	0.29%
MM 1	92.81%	93.09%	0.28%

	Aug-25	Sep-25	Change
% of stays under 6 months			
Industry	18.68%	19.97%	1.29%
MM 1	16.67%	18.47%	1.80%

	Aug-25	Sep-25	Change
New Admissions (permanent)			
Industry	4738	6718	41.78%
MM 1	3166	4767	50.56%

	Aug-25	Sep-25	Change
Respite Usage			
Industry	213870	250276	17.02%
MM 1	148731	176732	18.83%

	Aug-25	Sep-25	Change
Respite to Permanent Conversion			
Industry	51.61%	46.73%	-4.88%
MM 1	54.77%	48.60%	-6.18%

	Aug-25	Sep-25	Change
Average age of new admissions			
Industry	85.58	85.90	0.32
MM 1	85.72	86.13	0.40

	Aug-25	Sep-25	Change
Changes to advertised room prices			
# of Services increased highest price	276	88	-68.12%
# of Services increased lowest price	239	74	-69.04%
Industry Average Price	\$579,162	\$580,215	0.18%