

Mirus Industry Analysis September 2025

Under embargo until 18.09.2025

Total care time increased again from July to August as did RN time, with total time increasing 1.63% and RN time increasing by 0.77%. The sector is now delivering on average, 9 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 increased very slightly by 0.12% in August.

Workforce	Jul-25	Aug-25	Change
Care Minutes (PRPD)	220.47	224.05	1.63%
RN Minutes	45.37	45.72	0.77%
EN Minutes	6.53	6.62	1.32%
AIN Minutes	168.57	171.72	1.87%
Allied Health	9.91	9.49	-4.23%
DT/AO	6.06	5.80	-4.30%
Non Care Minutes (Hospitality)	48.47	48.26	-0.44%

The time it takes reassessment requests to be actioned decreased in August, with the average reassessment being completed on the 20th day after the request. 276 services continued the trend of increasing their highest room price and 239 services increased their lowest price, which is roughly the same number of services that increased prices in July.

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'.

ADS	Jul-25	Aug-25	Change
Industry	\$300.95	\$300.78	-\$0.17
MM 1	\$297.57	\$297.46	-\$0.10
MM 2-3	\$306.34	\$306.06	-\$0.28
MM 4-5	\$316.67	\$316.40	-\$0.27

Claiming Activity	Jul-25	Aug-25	Change
Industry	7.19%	7.39%	0.21%
MM 1	7.36%	7.47%	0.12%
MM 2-3	7.19%	6.97%	-0.22%
MM 4-5	5.96%	7.61%	1.65%

Voluntary Claiming	Jul-25	Aug-25	Change
Industry	4.57%	5.15%	0.58%
MM 1	4.83%	5.25%	0.42%
MM 2-3	4.27%	4.51%	0.24%
MM 4-5	3.30%	5.66%	2.36%

AN-ACC Age	Jul-25	Aug-25	Change
Industry	44.47%	44.83%	0.36%
MM 1	43.99%	44.33%	0.34%
MM 2-3	45.10%	45.19%	0.09%
MM 4-5	60.61%	59.57%	-1.04%

Days from Request to Reassessment	Jul-25	Aug-25	Change
Industry	22.26	20.01	-10.07%
MM 1	20.76	19.17	-7.65%
MM 2-3	27.10	22.34	-17.53%
MM 4-5	24.72	22.12	-10.55%

Occupancy	Jul-25	Aug-25	Change
Industry	91.95%	92.07%	0.12%
MM 1	92.62%	92.78%	0.15%

% of stays under 6 months	Jul-25	Aug-25	Change
Industry	21.62%	18.56%	-3.06%
MM 1	21.75%	16.67%	-5.08%

New Admissions (permanent)	Jul-25	Aug-25	Change
Industry	4873	4657	-4.43%
MM 1	3332	3133	-5.95%

Respite Usage	Jul-25	Aug-25	Change
Industry	190,112	214,880	13.03%
MM 1	132,935	149,946	12.80%

Respite to Permanent Conversion	Jul-25	Aug-25	Change
Industry	47.49%	42.30%	-5.18%
MM 1	50.20%	43.08%	-7.13%

Average age of new admissions	Jul-25	Aug-25	Change
Industry	85.37	85.65	0.28
MM 1	85.37	85.75	0.38

Changes to advertised room prices	Jul-25	Aug-25	Change
# of Services increased highest price	282	276	-2.13%
# of Services increased lowest price	269	239	-11.15%
Industry Average Price	\$572,489	\$579,162	1.17%