

Mirus Industry Analysis December 2025

Under embargo until Friday 12 December

Total care time increased slightly from October to November however RN decreased, with total time increasing by 0.63% and RN time decreasing by -0.25%. Care delivery time appears to be plateauing after four months of significant increases.

Average Daily Subsidy remains stable as slight declines in the most recent month are backfilled over the following weeks with reassessments that are backdated. Occupancy was relatively unchanged, decreasing ever so slightly by -0.01%, which is the first time occupancy has decreased in five months.

Workforce	Oct-25	Nov-25	Change
Care Minutes (PRPD)	236.45	237.95	0.63%
RN Minutes	48.27	48.15	-0.25%
EN Minutes	7.06	7.40	4.82%
AIN Minutes	181.12	182.40	0.71%
Allied Health	10.73	10.12	-5.74%
DT/AO	6.46	6.20	-4.04%
Non Care Minutes (Hospitality)	51.67	51.02	-1.25%

The slowdown in occupancy was likely caused by the number of permanent admissions falling by -76.49%. This was brought on by consumers motived to be admitted under the previous payment rules and avoid a 2% retention fee on RAD payments. So, the swell of admissions in September and October has led to a drop off in demand in November. Respite usage declined again from the spike in September and is now back to previous levels.

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	Oct-25	Nov-25	Change	Occupancy	Oct-25	Nov-25	Change
Industry	\$310.75	\$311.01	\$0.26	Industry	92.68%	92.67%	-0.01%
MM 1	\$307.81	\$308.06	\$0.25	MM 1	93.43%	93.37%	-0.06%
MM 2-3	\$311.97	\$312.20	\$0.23				
MM 4-5	\$330.25	\$330.61	\$0.36				
Claiming Activity	Oct-25	Nov-25	Change	% of stays under 6 months	Oct-25	Nov-25	Change
Industry	7.88%	8.34%	0.45%	Industry	22.56%	23.87%	1.32%
MM 1	7.91%	8.13%	0.21%	MM 1	21.28%	21.72%	0.44%
MM 2-3	7.45%	8.67%	1.22%				
MM 4-5	8.49%	9.20%	0.71%				
Voluntary Claiming	Oct-25	Nov-25	Change	New Admissions (permanent)	Oct-25	Nov-25	Change
Industry	4.59%	5.08%	0.49%	Industry	9037	2125	-76.49%
MM 1	4.63%	5.00%	0.37%	MM 1	6371	1305	-79.52%
MM 2-3	4.20%	4.85%	0.65%				
MM 4-5	5.01%	6.08%	1.07%				
AN-ACC Age	Oct-25	Nov-25	Change	Respite Usage	Oct-25	Nov-25	Change
Industry	45.30%	44.90%	-0.40%	Industry	220491	195169	-11.48%
MM 1	45.00%	44.72%	-0.28%	MM 1	154871	137049	-11.51%
MM 2-3	45.76%	45.30%	-0.46%				
MM 4-5	61.10%	59.03%	-2.07%				
Days from Request to Reassessment	Oct-25	Nov-25	Change	Respite to Permanent Conversion	Oct-25	Nov-25	Change
Industry	19.00	19.66	3.46%	Industry	56.01%	53.26%	-2.75%
MM 1	17.13	18.69	9.11%	MM 1	58.11%	55.20%	-2.91%
MM 2-3	23.09	22.76	-1.39%				
MM 4-5	24.12	21.11	-12.49%				
				Average age of new admissions	Oct-25	Nov-25	Change
				Industry	85.94	84.38	-1.57
				MM 1	86.03	84.39	-1.64
				Changes to advertised room prices	Oct-25	Nov-25	Change
				# 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%