

Mirus Industry Analysis November 2025

Under embargo until 16.11.25

Total care time increased from September to October and RN time also increased, with total time increasing by 5.68 % and RN time increasing by 4.17%. This increase in care delivery came at the same time as the subsidy price indexation, which saw the average daily subsidy for the sector increase by \$9.23 or 3.06%.

Workforce	Sep-25	Oct-25	Change
Care Minutes (PRPD)	223.75	236.45	5.68%
RN Minutes	46.23	48.16	4.17%
EN Minutes	6.69	7.07	5.71%
AIN Minutes	170.82	181.21	6.08%
Allied Health	10.17	10.65	4.75%
DT/AO	6.15	6.50	5.67%
Non Care Minutes (Hospitality)	48.82	52.09	6.69%

Another increase in occupancy was fuelled by a huge number of permanent admissions in October (8,232). Likely caused by consumers motivated to get in under the previous payment rules and avoid a 2% retention fee on RAD payments. The 15,000 permanent resident admissions in September and October is roughly the same number as the previous three months of permanent admissions (June – August). Respite usage declined from the spike in the previous month but not all the way back to previous levels, as there was a clear consumer preference for permanent entry and 53% of respite residents converting to permanent.

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'.

	Sep-25	Oct-25	Change
ADS			
Industry	\$301.21	\$310.44	\$9.23
MM 1	\$297.74	\$307.58	\$9.83
MM 2-3	\$306.82	\$311.50	\$4.68
MM 4-5	\$316.38	\$329.81	\$13.43

	Sep-25	Oct-25	Change
Claiming Activity			
Industry	6.85%	7.69%	0.85%
MM 1	6.79%	7.79%	0.99%
MM 2-3	7.07%	7.03%	-0.04%
MM 4-5	6.81%	8.25%	1.44%

	Sep-25	Oct-25	Change
Voluntary Claiming			
Industry	4.56%	4.51%	-0.05%
MM 1	4.64%	4.59%	-0.05%
MM 2-3	4.42%	4.03%	-0.39%
MM 4-5	4.27%	4.85%	0.58%

	Sep-25	Oct-25	Change
AN-ACC Age			
Industry	45.50%	45.30%	-0.20%
MM 1	45.17%	45.00%	-0.17%
MM 2-3	45.79%	45.76%	-0.04%
MM 4-5	59.94%	61.10%	1.16%

	Sep-25	Oct-25	Change
Days from Request to Reassessment			
Industry	18.68	18.50	-0.94%
MM 1	16.63	16.88	1.54%
MM 2-3	22.81	22.24	-2.51%
MM 4-5	25.17	22.51	-10.56%

	Sep-25	Oct-25	Change
Occupancy			
Industry	92.40%	92.57%	0.18%
MM 1	93.13%	93.27%	0.13%

	Sep-25	Oct-25	Change
% of stays under 6 months			
Industry	19.86%	22.60%	2.75%
MM 1	18.31%	21.40%	3.08%

	Sep-25	Oct-25	Change
New Admissions (permanent)			
Industry	6835	8232	20.44%
MM 1	4834	5699	17.89%

	Sep-25	Oct-25	Change
Respite Usage			
Industry	250238	221693	-11.41%
MM 1	176112	155567	-11.67%

	Sep-25	Oct-25	Change
Respite to Permanent Conversion			
Industry	51.77%	52.81%	1.04%
MM 1	53.38%	54.85%	1.47%

	Sep-25	Oct-25	Change
Average age of new admissions			
Industry	85.89	86.00	0.10
MM 1	86.14	86.06	-0.08

	Sep-25	Oct-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%