

## 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 motived 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'.

ADS	Sep-25	Oct-25	Change	Occupancy	Sep-25	Oct-25	Change
Industry	\$301.21	\$310.44	\$9.23	Industry	92.40%	92.57%	0.18%
MM 1	\$297.74	\$307.58	\$9.83	MM 1	93.13%	93.27%	0.13%
MM 2-3	\$306.82	\$311.50	\$4.68				
MM 4-5	\$316.38	\$329.81	\$13.43				
Claiming Activity	Sep-25	Oct-25	Change	% of stays under 6 months	Sep-25	Oct-25	Change
Industry	6.85%	7.69%	0.85%	Industry	19.86%	22.60%	2.75%
MM 1	6.79%	7.79%	0.99%	MM 1	18.31%	21.40%	3.08%
MM 2-3	7.07%	7.03%	-0.04%				
MM 4-5	6.81%	8.25%	1.44%				
Voluntary Claiming	Sep-25	Oct-25	Change	New Admissions (permanent)	Sep-25	Oct-25	Change
Industry	4.56%	4.51%	-0.05%	Industry	6835	8232	20.44%
MM 1	4.64%	4.59%	-0.05%	MM 1	4834	5699	17.89%
MM 2-3	4.42%	4.03%	-0.39%				
MM 4-5	4.27%	4.85%	0.58%				
AN-ACC Age	Sep-25	Oct-25	Change	Respite Usage	Sep-25	Oct-25	Change
Industry	45.50%	45.30%	-0.20%	Industry	250238	221693	-11.41%
MM 1	45.17%	45.00%	-0.17%	MM 1	176112	155567	-11.67%
MM 2-3	45.79%	45.76%	-0.04%				
MM 4-5	59.94%	61.10%	1.16%				
Days from Request to Reassessment	Sep-25	Oct-25	Change	Respite to Permanent Conversion	Sep-25	Oct-25	Change
Industry	18.68	18.50	-0.94%	Industry	51.77%	52.81%	1.04%
MM 1	16.63	16.88	1.54%	MM 1	53.38%	54.85%	1.47%
MM 2-3	22.81	22.24	-2.51%				
MM 4-5	25.17	22.51	-10.56%				
	Sep-25	Oct-25	Change	Average age of new admissions	Sep-25	Oct-25	Change
	18.68	18.50	-0.94%	Industry	85.89	86.00	0.10%
	16.63	16.88	1.54%	MM 1	86.14	86.06	-0.08%
	22.81	22.24	-2.51%				
	25.17	22.51	-10.56%				
				Changes to advertised room prices	Sep-25	Oct-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%