

Mirus Industry Analysis - February 2026

Under embargo until Thursday 12 February

Total care time and RN time decreased from December to January, with total time decreasing by -1.22% and RN time decreasing by -2.08%. Care delivery time decreased for the second month in a row as providers attempt to find the right balance after five consecutive months of increasing care delivery beyond the 215-minute threshold. Average Daily Subsidy increased by 0.02% or \$0.07. Occupancy also declined for the second straight month, wiping out the gains of the previous five months.

Workforce	Dec-25	Jan-26	Change
Care Minutes (PRPD)	236.36	233.48	-1.22%
RN Minutes	47.90	46.91	-2.08%
EN Minutes	7.13	7.11	-0.25%
AIN Minutes	181.33	179.46	-1.03%
Allied Health	10.27	10.10	-1.62%
DT/AO	6.24	5.94	-4.76%
Non Care Minutes (Hospitality)	51.75	50.80	-1.84%

The slowdown in occupancy was caused by declining permanent admissions, which aligns with seasonal fluctuations. If seasonal trends hold the autumn months should produce a rebound as it is typically the strongest season for entry into residential aged care. January also produced a big surge in room price activity that the beginning of each quarter tends to show as the starting point of such budget-based decisions.

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	Dec-25	Jan-26	Change
Industry	\$311.48	\$311.55	\$0.07
MM 1	\$308.37	\$308.34	-\$0.02
MM 2-3	\$312.91	\$313.37	\$0.46
MM 4-5	\$330.77	\$330.76	\$0.00

Claiming Activity	Dec-25	Jan-26	Change
Industry	5.43%	6.04%	0.60%
MM 1	5.17%	5.85%	0.68%
MM 2-3	6.06%	6.09%	0.03%
MM 4-5	6.08%	7.21%	1.12%

Voluntary Claiming	Dec-25	Jan-26	Change
Industry	4.37%	4.19%	-0.18%
MM 1	4.19%	4.07%	-0.12%
MM 2-3	4.87%	4.26%	-0.61%
MM 4-5	4.70%	4.91%	0.21%

AN-ACC Age	Dec-25	Jan-26	Change
Industry	44.44%	45.53%	1.09%
MM 1	44.45%	45.73%	1.28%
MM 2-3	44.46%	45.56%	1.10%
MM 4-5	57.25%	58.03%	0.79%

Days from Request to Reassessment	Dec-25	Jan-26	Change
Industry	17.36	18.58	6.99%
MM 1	16.57	17.93	8.23%
MM 2-3	18.13	18.65	2.87%
MM 4-5	20.77	22.23	7.04%

Occupancy	Dec-25	Jan-26	Change
Industry	93.01%	92.62%	-0.39%
MM 1	93.85%	93.54%	-0.31%

% of stays under 6 months	Dec-25	Jan-26	Change
Industry	22.67%	18.18%	-4.49%
MM 1	21.93%	16.33%	-5.60%

New Admissions (permanent)	Dec-25	Jan-26	Change
Industry	4162	3910	-6.06%
MM 1	2845	2592	-8.86%

Respite Usage	Dec-25	Jan-26	Change
Industry	136469	162750	19.26%
MM 1	90805	107444	18.32%

Respite to Permanent Conversion	Dec-25	Jan-26	Change
Industry	52.74%	44.40%	-8.33%
MM 1	55.33%	45.57%	-9.77%

Average age of new admissions	Dec-25	Jan-26	Change
Industry	85.51	85.67	0.16
MM 1	85.64	86.02	0.38

Changes to advertised room prices	Dec-25	Jan-26	Change
# of Services increased highest price	66	129	95.45%
# of Services increased lowest price	61	123	101.64%
Industry Average Price	\$588,575	\$593,356	0.81%