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Mirus Industry Analysis April 2026 – Embargoed Thursday 16 April

Total care time and RN time decreased from February to March, with total time decreasing by -0.65% and RN time decreasing by 0.04%. Providers are seeking to more closely align care delivery time to their mandated targets following several months of increasing care delivery well past the requirement. Average Daily Subsidy decreased by $0.05 in March and occupancy increased, marking a two-month trend of growing occupancy.

Workforce	Feb-26	Mar-26	Change
Care Minutes (PRPD)	233.40	231.88	-0.65%
RN Minutes	47.13	47.15	0.04%
EN Minutes	7.24	6.90	-4.76%
AIN Minutes	179.03	177.83	-0.67%
Allied Health	10.81	10.84	0.30%
DT/AO	6.23	6.18	-0.90%
Non Care Minutes (Hospitality)	50.82	50.54	-0.56%

The decline in ADS was led by a drop in claiming activity along with an increase in the average number of days from request to assessment. Growth in occupancy was fuelled by permanent resident admissions and a declining proportion of stays under six months. Large numbers of homes continued to raise their highest and lowest room prices; however, the industry average price declined for the first time since the maximum price was raised to $750k in January-2025. This inconsistency is the result of many homes having a small number of rooms (often just one room) that are much larger and priced much higher than the majority of the homes' inventory and the industry average price is based on the weighted average of all rooms.

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'.

Suite 18 / 26-32 Pirrama Road, Pyrmont NSW 2009
1300 738 145 | marion.corbett@mirusaustralia.com
mirusaustralia.com

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ADS	Feb-26	Mar-26	Change
Industry	$313.42	$313.37	-$0.05
MM 1	$308.82	$308.81	-$0.01
MM 2-3	$313.37	$313.36	-$0.01
MM 4-5	$330.71	$330.51	-$0.20

Claiming Activity	Feb-26	Mar-26	Change
Industry	6.68%	6.22%	-0.47%
MM 1	6.34%	6.31%	-0.03%
MM 2-3	7.43%	5.75%	-1.69%
MM 4-5	7.65%	6.43%	-1.22%

Voluntary Claiming	Feb-26	Mar-26	Change
Industry	4.68%	4.11%	-0.57%
MM 1	4.41%	4.18%	-0.22%
MM 2-3	5.20%	3.75%	-1.45%
MM 4-5	5.55%	4.28%	-1.27%

AN-ACC Age	Feb-26	Mar-26	Change
Industry	45.79%	45.70%	-0.09%
MM 1	46.09%	46.05%	-0.04%
MM 2-3	45.78%	46.07%	0.29%
MM 4-5	57.10%	57.52%	0.42%

Days from Request to Reassessment	Feb-26	Mar-26	Change
Industry	16.39	18.17	10.86%
MM 1	15.74	17.16	8.99%
MM 2-3	17.46	18.73	7.23%
MM 4-5	19.03	22.93	20.49%

Occupancy	Feb-26	Mar-26	Change
Industry	92.59%	92.91%	0.33%
MM 1	93.49%	93.89%	0.40%

% of stays under 6 months	Feb-26	Mar-26	Change
Industry	23.11%	19.67%	-3.44%
MM 1	23.87%	19.38%	-4.49%

New Admissions (permanent)	Feb-26	Mar-26	Change
Industry	4593	4650	1.24%
MM 1	3167	3171	0.13%

Respite Usage	Feb-26	Mar-26	Change
Industry	170,002	152,586	-10.24%
MM 1	115,402	100,988	-12.49%

Respite to Permanent Conversion	Feb-26	Mar-26	Change
Industry	53.19%	49.47%	-3.72%
MM 1	55.34%	51.53%	-3.81%

Average age of new admissions	Feb-26	Mar-26	Change
Industry	85.52	85.36	-0.16
MM 1	85.75	85.72	-0.03

Changes to advertised room prices	Feb-26	Mar-26	Change
# of Services increased highest price	142	155	9.15%
# of Services increased lowest price	121	156	28.93%
Industry Average Price	$595,750	$594,557	-0.20%

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