

Mirus Industry Analysis | June 2026 edition | Reporting on May data | Release Tuesday 9 June

May 2026 data shows occupancy reaching 93.12%, the highest level recorded since May 2017 and the fourth consecutive monthly increase, while average advertised room prices crossed \$600,000 for the first time on record. Total care time and RN time decreased from April to May, with total time decreasing by -0.56% and RN time decreasing by -0.83%. Average case mix and occupancy continue to climb, which means demand is catching up to rosters that still have capacity to absorb that increasing demand. Average Daily Subsidy decreased by \$0.05 in May, consistent with the backdating effect of reassessment requests, and is expected to recover through June and July as uplifts are actioned.

Workforce	Apr-26	May-26	Change
Care Minutes (PRPD)	229.94	228.65	-0.56%
RN Minutes	46.80	46.41	-0.83%
EN Minutes	6.99	6.68	-4.55%
AIN Minutes	176.15	175.56	-0.33%
Allied Health	10.45	9.69	-7.32%
DT/AO	6.02	5.97	-0.91%
Non Care Minutes (Hospitality)	50.30	48.82	-2.94%

The decline in ADS will likely reverse to a gain as reassessment requests made in May are actioned throughout June and into July. Claiming was relatively flat throughout most of 2025, however from November claims have increased, adding 1.4 minutes to average casemix, now sitting at just over 216 minutes PRPD. The weighted average advertised room price increased 0.87% to \$604,919, moving north of the \$600k threshold for the first time. Incremental increases in room pricing are likely to continue for the foreseeable future as occupancy grows along with evidence that consumers are willing to pay what providers ask in order to recover their costs.

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	Apr-26	May-26	Change
Industry	\$313.52	\$313.47	-\$0.05
MM 1	\$308.30	\$308.32	\$0.02
MM 2-3	\$314.63	\$314.38	-\$0.25
MM 4-5	\$331.34	\$331.12	-\$0.22

Claiming Activity	Apr-26	May-26	Change
Industry	7.35%	6.68%	-0.67%
MM 1	7.15%	6.53%	-0.62%
MM 2-3	7.75%	7.22%	-0.52%
MM 4-5	8.00%	6.72%	-1.27%

Voluntary Claiming	Apr-26	May-26	Change
Industry	4.98%	4.54%	-0.44%
MM 1	4.87%	4.47%	-0.41%
MM 2-3	5.16%	5.03%	-0.14%
MM 4-5	5.43%	4.18%	-1.25%

AN-ACC Age	Apr-26	May-26	Change
Industry	45.73%	46.05%	0.32%
MM 1	46.13%	46.74%	0.61%
MM 2-3	46.26%	44.46%	-1.80%
MM 4-5	57.23%	61.33%	4.10%

Days from Request to Reassessment	Apr-26	May-26	Change
Industry	18.71	16.57	-11.44%
MM 1	17.96	16.01	-10.89%
MM 2-3	20.47	18.13	-11.40%
MM 4-5	20.30	17.26	-14.98%

Occupancy	Apr-26	May-26	Change
Industry	92.86%	93.12%	0.26%
MM 1	93.79%	94.05%	0.26%

% of stays under 6 months	Apr-26	May-26	Change
Industry	19.46%	19.00%	-0.47%
MM 1	17.82%	18.02%	0.20%

New Admissions (permanent)	Apr-26	May-26	Change
Industry	4596	4082	-11.18%
MM 1	3092	2844	-8.02%

Respite Usage	Apr-26	May-26	Change
Industry	187,758	178,951	-4.69%
MM 1	126,881	119,984	-5.44%

Respite to Permanent Conversion	Apr-26	May-26	Change
Industry	53.54%	48.78%	-4.76%
MM 1	56.31%	51.62%	-4.69%

Average age of new admissions	Apr-26	May-26	Change
Industry	85.69	85.08	-0.62
MM 1	86.03	85.22	-0.81

Changes to advertised room prices	Apr-26	May-26	Change
# of Services increased highest price	129	168	30.23%
# of Services increased lowest price	136	134	-1.47%
Industry Average Price	\$599,718	\$604,919	0.87%