



BDO | Nursing Homes Ireland

Private and Voluntary Nursing Homes

Biannual Pulse Survey Report July 2025

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Introduction

BDO, Nursing Homes Ireland Biannual Pulse Survey July 2025

We are delighted to present our first BDO | Nursing Homes Ireland Private and Voluntary Nursing Home Biannual Pulse Survey.

We know this is a highly valued publication for the many and varied stakeholders of the nursing home sector. This is becoming increasingly more relevant now given Ireland's ageing demographic profile, with the ESRI estimating that by 2040, 1 in 5 people in Ireland will be aged 65+, and further that long-term residential care and home support requirements will increase by at least 60% by 2040.¹

This pulse survey was undertaken in May 2025, with findings pertaining to the latest 6-month reporting period of participating Homes, in addition to operational statistics as at May 2025. The survey results reveal critical areas requiring strategic action to protect the long-term sustainability of this vital sector, for which demand is continually increasing.



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We thank all participants for their valuable feedback, which is crucial for providing evidence-based insights to sector stakeholders and driving informed, targeted improvements.

Nursing Homes Ireland



TADHG DALY
CEO, Nursing
Homes Ireland

We are pleased to present the July 2025 edition of the Biannual Member Survey, produced in collaboration with BDO. This report provides a timely snapshot of the key challenges and trends shaping private and voluntary nursing home care across Ireland.

We thank all Members who took the time to participate. Your insights are invaluable in building a stronger evidence base to support our advocacy and policy work. With sector pressures intensifying, the need for accurate, up-to-date data has never been more important.

This pulse survey captures current realities in care delivery, staffing, occupancy, compliance, and funding. The trends it reveals, particularly in care complexity, workforce strain, and financial pressures, underscore the urgency for policy reform and sustainable investment.

By continuing these pulse surveys, we aim to track sectoral shifts more regularly, enabling NHI to advocate with clarity and confidence for the supports our Members, residents, and staff urgently require.

Bank of Ireland



GRAINNE MAHON HENSON
Head of Healthcare,
Bank of Ireland

Bank of Ireland is proud to be a committed supporter of the nursing home sector, a community we are honoured to serve.

The insights presented in this report reflect six months of data, showing that nursing homes meet HIQA regulatory standards to a level of nearly 90%, along with critical factors such as funding, dependency levels, and occupancy rates. The survey reveals a continuing trend of residents' needs increasing, requiring greater care hours. This challenge is compounded by significant staff turnover rates, complicating the delivery of consistent care, and affecting the resident experience. Moving forward, it is essential to review the funding model and explore innovative solutions to support sustainable staffing and care delivery.

As a bank, we understand the challenges faced by the sector while also recognising opportunities for meaningful growth and improvement. We are dedicated to working with our nursing home partners to ensure these homes continue to thrive and serve their communities, delivering compassionate and safe care to all residents.

¹ Economic & Social Research Institute: 'Projections of national demand and bed capacity requirement for older people's care in Ireland, 2022-2040: Based on the Hippocrates model', published 30 June 2025.

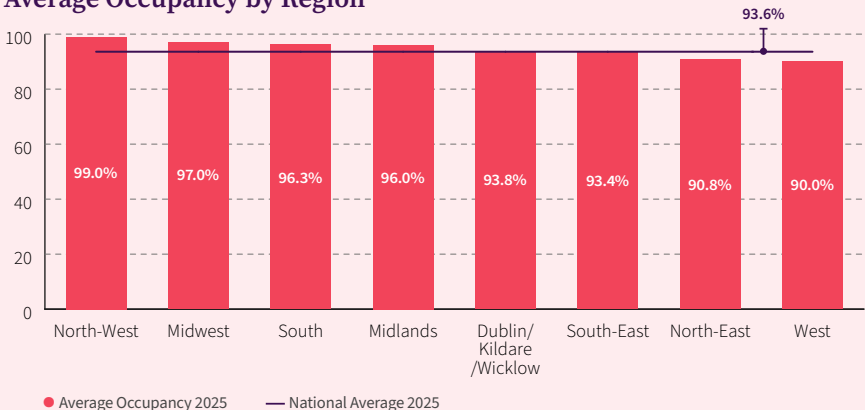
Occupancy



93.6%

on average over the last 6 months, reflecting a growth of 1.3 percentage points (pp) compared to our 2023/24 survey result.²

Average Occupancy by Region



Care Hours



On average

3.85

care hours were provided per resident per day as of May 2025, up from 3.74 in the 2023/24 survey.

Care Hours per Resident per Day (CHRPD)

Respondents were found, on average, to provide 3.85 care hours per day to each resident. This represents a c. 3% increase since our 2023/24 survey's CHRPD of 3.74.

The increasing focus on person-centred care coupled with compliance requirements are likely contributing to care hour increases. Care hours continue to vary by home, driven by individual care assessments and resident profiles.



Dependency



On average

56%

of residents were classified under high and maximum dependency level categories as of May 2025.

Dependency Percentage*

*Dependency percentages are rounded.

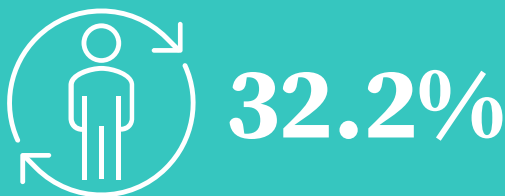
Category:	Independent/Low	Medium	High	Max
% Residents	17%	27%	24%	32%
	56%			

As at May 2025, an average of 56% of residents in respondents' Homes were classified within high or maximum dependency categories.

Whilst participating Homes, and therefore response samples may differ, this proportion on balance is consistent with the 2023/24 survey, outlining that high and maximum dependency levels continue to account for approximately 60% of all residents – a trend that underscores the ongoing complexity of care needs across participating Homes.

² BDO/Nursing Home Ireland 'Private and Voluntary Nursing Home Survey 2023-24'; Available [here](#).

Staff Turnover (annualised)



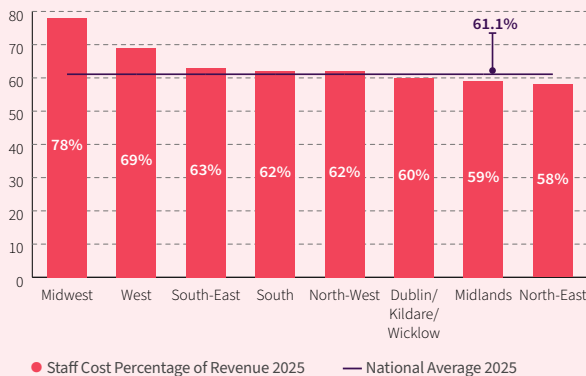
Reported staff turnover in the last 6-month period was 16.1%, noting that when annualised it equates to c. 32%, aligning with previous turnover rates reported in the 2023/24 survey. This points to continuing unresolved staffing issues in the sector, reflective of the recruitment and retention challenges in health and social care.

Staff Costs



The Midwest, similarly, to our 2023/24 survey, exhibits the highest staff cost percentage noting however that sampling representations may vary widely per Home.

Staff Cost % of Revenue



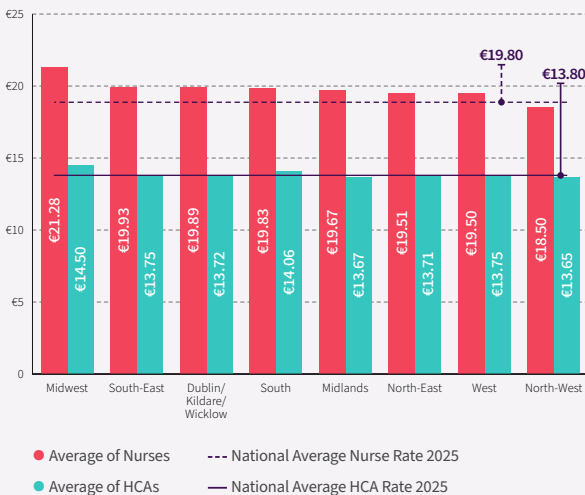
Entry-level Pay Rates for Nurses and Healthcare Assistants (HCAs)



HCA rates have increased at a faster pace to nurse rates in recent times, driven by rises in the national minimum wage (currently €13.50), the pressure of living wage standards, and ongoing recruitment and retention issues across the sector.

These factors particularly impact upon entry-level roles, as providers compete for a limited pool of qualified staff. This trend underscores the evolving cost landscape for care providers and the growing emphasis on workforce sustainability in the sector.

Average Entry-level Hourly Rates



Funding Profile



84%

of residents currently funded via the Fair Deal Scheme.

Funding Profile*

*Percentages are rounded.

Classification:	Fair Deal	Private	Other
% Residents	84%	12%	4%

The Fair Deal Scheme remains the primary funding source, supporting 84% of residents in respondents' Homes as at May 2025 - an increase of 14.8 pp from our 2023/24 survey. While this growth may partially reflect sampling variations, the continuing dominance of the Fair Deal Scheme is clear.

Significant differences between public and private rates continue to prevail, with the national average private and voluntary Fair Deal rate standing at €1,250 as at June 2025, in comparison with the average national public rate of €1,915 (last published in January 2025). This represents a weekly differential of €665, an **increase** of €25 since our 2023/24 survey report.

Primary Challenges Reported by Survey Respondents

Staffing

- Staff-related challenges continue to be one of the most significant issues facing the sector. The leading concerns reported pertain to staff recruitment, staff turnover rates, and restrictions concerning the 50/50 non-EEA staffing rule.
- The 50/50 staffing rule is highlighted by Homes as being particularly impactful: Under this regulation, at least 50% of nursing home employees must be EEA nationals at the time of an employment permit application, which directly affects eligibility for hiring non-EEA staff.
- Associated non-EEA staffing costs also continue to rise, with the minimum annual remuneration for HCAs currently at €30,000 – this equates to €14.75 per hour basic pay based on a 39 hour working week, which is nearly €1 per hour higher than the average entry-level pay rate for HCAs reported by participating Homes.³
- Limited Fair Deal funding remains a significant barrier according to survey respondents, preventing Homes from addressing these challenges and making improvements to staffing, operations, and the overall quality of care.

Regulations & Compliance

- Regulatory and compliance obligations were also highlighted as key concerns by participating Homes, highlighting the sector's ongoing challenges and financial impacts associated with changes to standards introduced by the regulator.

- Fire compliance emerged as a particularly pressing issue. Respondents reported significant challenges in navigating complex compliance requirements, and further in managing the substantial costs tied to fire safety upgrades, regular inspections, and extensive documentation.
- These combined pressures—increasing regulatory complexity and rising compliance costs—are placing a considerable strain on operational and financial resources.

Funding

- Funding has again been raised as a key issue facing the sector, and which directly impacts on the key challenges outlined above concerning staffing and regulatory matters.
- As detailed above, the Fair Deal Scheme continues to be the dominant funding source, with Homes having limited access to alternative sources of income.
- Respondents have noted that the inflexibility of the prevailing Scheme is problematic in the context of differing resident needs along with rising operational and capital costs, leading to intensified financial pressure as is in part, evidenced with a number of Home closures across the Country.

³ <https://enterprise.gov.ie/en/what-we-do/workplace-and-skills/employment-permits/permit-types/general-employment-permit/>

HIQA compliance



The Health Information and Quality Authority (HIQA) is the regulatory body responsible for inspecting and registering residential care services for older persons in Ireland.

BDO has analysed nursing home inspection reports published by HIQA from December 2024 to May 2025. This analysis⁴ highlights the frequency and distribution of all outcomes, including noncompliant outcomes, offering valuable insights in to where supports are most needed within the sector.

Overall Levels of Reported Compliance

As detailed in the chart to the right, compliance levels across the sector (on the dates of inspection) are high, with noncompliant outcomes amounting to 11% of total outcomes.

This is consistent with HIQA's Monitoring and Regulation Overview Report of December 2023, which outlined total noncompliant outcomes of 15% in 2021, and 12% in 2022.⁵

Top 5 Reported Areas of Non Compliance

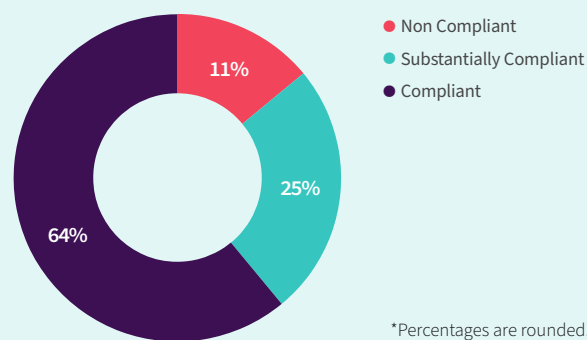
Of the noncompliant outcomes, the top reported areas are illustrated in the chart to the right. In this regard we note initiatives undertaken in recent times, specifically targeted at a number of these issues.

A Resident Safety Improvement Scheme was announced by Minister Butler in December 2023 to improve infection prevention and fire safety in private and voluntary nursing homes. The Scheme allowed for a maximum of €25,000 to be claimed by individual Homes.

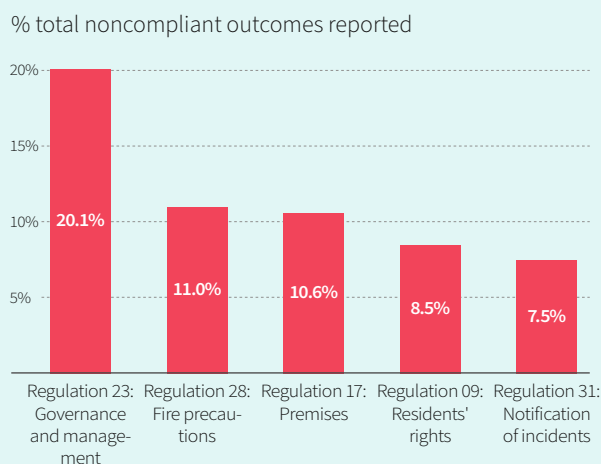
Further, changes to regulations were introduced on March 31st 2025 with HIQA stating that *"the new regulations focus on a number of areas such as governance and management, residents' rights, risk management, infection control and shorter timelines for nursing homes to notify HIQA of key events to improve the safety and welfare of residents."*⁶

Supporting Homes in navigating these challenges will continue to require a multifaceted approach, to ensure that funding models and training initiatives align to regulatory implementations, to ensure that Homes are adequately equipped to cater for such updates to regulations.

Compliance Summary*



Top 5 Noncompliant Inspection Outcomes



⁴ Reports published between December 2024 and June 2025 on <https://www.hiqa.ie>

⁵ Overview Report: Monitoring and Regulation of Older Persons Services in 2022, HIQA

⁶ <https://www.hiqa.ie/hiqa-news-updates/hiqa-welcomes-significant-change-nursing-home-regulations-which-take-effect-today>



The information provided by respondents and included in this report were not audited by, and have not been verified by BDO, but rather have been analysed and presented to highlight trends in the sector.

Accordingly the survey results should not be relied upon to the same extent as audited financial statements. Furthermore individual Homes can display different trends dependant on the specific circumstances pertaining to each Home.

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