

Vale of Glamorgan Market Stability & Sufficiency

Update 2025–26

Assessing regional market conditions and future outlook





Purpose and Context of the Market Stability Report Refresh

Annual Market Stability Review

Local authorities must annually review market stability to ensure sustainable, high-quality care and support availability.

Focus on Local Care Market

The update highlights demographic changes, service demand, workforce challenges, and financial pressures in local care.

Alignment with Strategic Documents

The report aligns with commissioning strategies to promote sustainability and improve care outcomes.

Accessible Summary for Stakeholders

This presentation summarises complex reports to guide service development and commissioning decisions through 2026–27.



Demographic Change and Growing Demand for Care

Ageing Population Growth

The Vale of Glamorgan expects a 24% increase from 2024 in residents aged 65+ by 2027, especially of people over 90 years old.

Complex Care Needs

Longer lifespans increase frailty, dementia, and multiple conditions, demanding adaptable and skilled care services.

Rising Service Demand

Referrals for home care and specialist dementia support are increasing due to demographic changes.

Planning and Commissioning

Using data and feedback helps plan sustainable, flexible, and community-based care to meet future needs.



Children and Young People: Key Areas of Focus

Increasing Demand and Challenges

Growing demand in Children and Young People Services driven by social and economic pressures requires early help and intervention.

Support for Children with Disabilities

Demand for respite, domiciliary care, and direct payments is rising, reflecting population growth and personalised support awareness.

Care Leavers and Asylum Seeking Children

Limited supported accommodation for care leavers and asylum-seeking children drives collaboration to increase local housing options.

Focus on Prevention and Stability

Efforts emphasise prevention, stability, and improved outcomes through strategic commissioning and community partnerships.



Care at Home, Reablement and Community-Based Support

Growth in Home Care Services

Domiciliary care, reablement, and live-in care services have grown steadily to support independence.

Expansion of Reablement Services

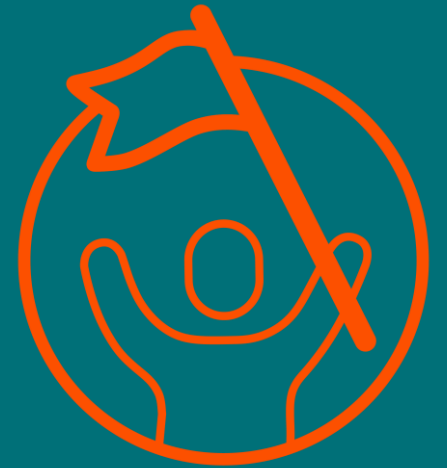
Short-term, strengths-based support helps people regain skills and delay long-term care needs.

Role of Direct Payments

Direct Payments allow personalised care by employing personal assistants from local communities.

Community-Based Alternatives

Investments in micro-enterprises and small providers offer flexible, personalised community support.



Residential and Nursing Care Market Position

Current Market Capacity

Current residential and nursing care capacity generally meets short-term demand but remains fragile across care types.

Dementia Nursing & Specialist Demand

High demand for dementia nursing and specialist placements with limited local choice forces some out-of-area placements at higher costs.

Council Care Homes Utilisation

Council-operated care homes provide good care but are underutilised; strategic reviews aim to optimise and expand capacity.

Workforce and Market Challenges

Workforce shortages and limited placements for complex care pose challenges to meeting future care needs affordably and locally.





Workforce and Provider Market Challenges

Workforce Capacity Challenges

Recruitment and retention difficulties limit /impact care provider capacity across domiciliary, residential, and specialist services.

Impact of Overseas Workers

Overseas workers ease shortages but changes in immigration rules risk provider stability and service continuity.

Council Collaboration Efforts

The Council engages with partners and providers through forums, monitoring, and migrant workforce plans to improve stability.

Market Complexity and Diversity

Care market varies with some care at home areas saturated and pressure in specialist services like dementia nursing.





Partnership Working and Community Collaboration

Integrated Multi-sector Collaboration

Vale of Glamorgan Council works closely with health, housing, education, third sector and private providers to ensure market stability and sufficiency.

Strengthened Community Partnerships

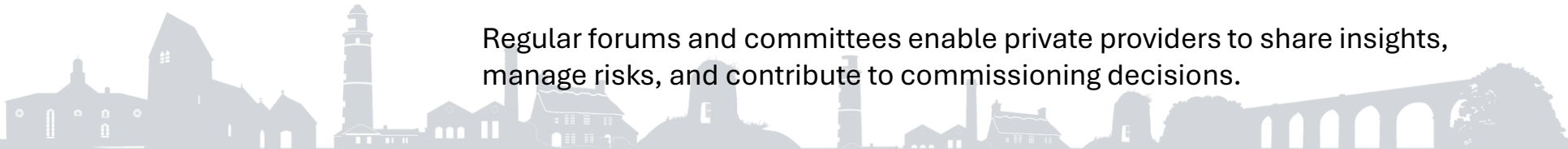
The refreshed Vale Community Partnership emphasises voluntary and social value organisations to promote local resilience and personalised care.

Engagement with Private Providers

Regular forums and committees enable private providers to share insights, manage risks, and contribute to commissioning decisions.

Social Services Act Principles

Partnership working aligns with the Social Services and Well-being Act, focusing on co-production, prevention, and shared responsibility.





Priorities and Outlook for 2026–27

Domiciliary Care Development

Focus on strengthening commissioning and brokerage for domiciliary care to ensure fairness, value and outcomes for people.

Homes for a Brighter Future

Focus on recruitment and retention of in-house foster carers to reduce reliance on independent fostering agencies

Supported Living Expansion

Priority on expanding supported living options for people with learning disabilities to reduce costly residential placements.

Residential Care Investment

Feasibility studies to guide investment in residential and nursing care, including promoting partnerships with health services.

Workforce and Sustainability

Emphasis on workforce development, fair work, and provider sustainability across all care sectors.