Llywodraeth Cymru
Welsh Government

Removing profit from the care of children looked after – transition to a not-for-profit model

Report 2 - November 2025

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Introduction

i. The Health and Social Care Committee published its Stage 1 report on the then Health and Social Care (Wales) Bill on 11 October 2024. Recommendation 9 of that report stated:

The Minister should prepare and publish a report on progress with the transition to a not-for-profit model. This should include an update, by local authority, on the number of places leaving the market and the number of new places created and should reflect on the stability of existing places. It should also include details of the consultation with children and young people directly affected by the Bill and the numbers taking up the active offer of advocacy. This should be done at six monthly intervals, starting from the date of the Stage 1 debate.

ii. The Minister for Children and Social Care accepted this recommendation and committed to publishing a six-monthly progress report. The first 6-monthly report was published in May 2025 and, where available, set out the position as of 31 March 2025. This is the second of these reports and sets out the position as of 30 September 2025, where updated data is available. The third report is intended to be completed in May 2026.

Report structure

iii. Consistent with the structure of the first report, this report is divided into the same sections, beginning with a summary of the report's findings and setting out next steps. Where possible, children's home and fostering data is broken down into local and geographical footprints across the following types of provision:

Not-for-profit provision	For-profit provision
Local Authority (local authority) run	(this data is not broken down by specific type of for-profit provision)
Other not-for-profit (non-local authority)	

iv. By 'other not-for-profit' we have determined this to be provision that operates under one of the four recognised operating models set out under the Health and Social Care (Wales) Act 2025 ("The 2025 Act"), specifically those that are either:

- a charitable company limited by guarantee without a share capital,
- a charitable incorporated organisation,
- a charitable community benefit society, or
- a community interest company limited by guarantee without a share capital

v.   Provision is measured in terms of the number of services and places (maximum capacity of each service) registered with Care Inspectorate Wales (CIW). Fostering data is also presented in terms of households, where available.

vi.   Section 1 provides an overview of the sector in Wales as of 30 September 2025, including the number of children's home services, fostering services and secure accommodation services, broken down by provider type (not-for-profit local authority, other not-for-profit or for-profit) and by regional partnership board and local authority area. These are the three types of services that will need to be provided by local authorities or other not-for-profit providers once implementation of the 2025 Act is complete.

vii.   Section 2 covers market entrants and exits for children's home services and section 3 covers this same data for fostering services. The report then reflects on the stability of places of children looked after in section 4 concluding with data on the take up of the offer of statutory advocacy in section 5.

Data presentation- developments since Report 1

viii.   As with the first report, this report comprises data from CIW, the Children's Commissioning Consortium Cymru (4C's), Foster Wales and Welsh Government. However, for this second report a common reporting point (of 30 September 2025) was established between CIW, 4C's and Foster Wales, aiding comparability. Going forward it should be possible to maintain a common reporting point between these organisations for future iterations of the report. Welsh Government data (included in sections 4 and 5) is still presented as of 31 March 2024, however an updated narrative is included within these sections giving additional context and plans for updated data to be included in future reports.

ix.   In addition to establishing a common reporting point additional data is also available for this report, specifically local authority-level fostering data regarding registered foster care households and places. This is set out within Table 1b. A further breakdown of local authority fostering households and places by mainstream and connected persons (kinship) provision is also included at Table 1c. Tables 3a to 3b show fostering market entrants and exits (by mainstream and connected persons households and places). Data for independent fostering agencies (IFAs) entering and leaving the market is currently only available at a household level, not by place. This is provided in table 3c.

x.   For this report and future publications, we have taken the decision to present data by regional partnership board area, where possible, in addition to by local authority area. This allows additional identification and analysis of regional trends.

xi.   In a small number of cases data for children's homes places contains services which have large onsite Estyn registered schools. These settings are not available to all children looked after and would be matched to a specific profile of children. Therefore, the registered capacity shown by the host local authority may appear slightly higher than the actual availability for commissioning purposes.

xii.   It is important to note that while the focus of this report is measuring movement in the market through quantitative data, the wider qualitative context of the right homes, available at the right time, to meet children's identified needs, both current and forecast, is essential to delivering not only sufficiency of numbers but sufficiency of child focused, outcome focused provision.

xiii.   There is currently a mismatch of registered provision across all placement types to meet children and young people's needs. CIW's rated inspections from April 2025 demonstrate overall the quality of registered provision, by all provider types, is good, but there is too much provision which is not correctly targeted at meeting the presenting needs of children looked after. Local Authorities continue to work with all providers to reduce this gap and improve sufficiency, this includes engaging with providers on the needs profile in Wales, the latest analysis of this by 4Cs can be found here. This includes a range of case studies which illustrate the direct impact on children's care experiences.

Next Steps

xiv.   The next report is intended to be completed by May 2026 and, where available, will contain data up to 31 March 2026.

Report summary

This report provides detailed information on the number of registered services, places and households for children's home services, fostering services and secure accommodation services in Wales. It also includes sections on the stability of places and the take-up of advocacy services. Key points from the data are set out below (throughout the report percentages are rounded to the nearest whole number).

1. **As of 30 September 2025, there are 375 children's home services registered in Wales offering a maximum of 1,291 places. Both represent an increase on the figures in the previous report as of 31 March 2025. For-profit provision continues to account for over three-quarters of all children's home places.**

   - By region, the greatest number of children's home services (85 or 23% of the national figure) and places (306 or 24% of the national figure) are in North Wales. The greatest regional proportion of for-profit children's home services is found within West Glamorgan (45 of 47 services or 96% and 173 of 177 places, or 98%).

   - Within local authority areas, the greatest proportion of for-profit children's home services and places were recorded in Neath Port Talbot and Torfaen. All residential provision in these areas operated on a for-profit basis as of 30 September 2025. In contrast Ceredigion had no for-profit children's home services registered although it also contains the lowest overall number of services (2) and places (9) in Wales.

2. **A significant proportion of entrants to the children's home market continue to be 'for-profit' though numbers of not-for-profit entrants have increased.**

   - Data between 1 April 2025 and 30 September 2025 shows 21 out of the 32 children's home services (66%) and 61 of the 98 places (62%) registered by CIW were for-profit. The remaining 11 services (and 37 places) were registered to either local authority or other not-for-profit providers. This is an increase on the 4 not-for-profit services (and 5 places) registered during the previous 6-month period.

   - The reporting period also saw 7 children's home services (and 17 places) leave the market, all of whom were for-profit. This compares to the previous 6-month period, which saw 4 for-profit children's home services, alongside 7 for-profit and 4 not-for-profit places.

   - Gwent recorded the highest regional growth in the number of registered children's home services and places with 13 services and 42 places in total. It

provided 4 (44%) of the 9 services across Wales that were newly registered by local authorities and 19 (59%) of the 32 newly registered places. Gwent also recorded 9 (or 43%) of all 21 for-profit services and 23 (or 38%) of 61 for-profit places recorded across Wales.

- Powys was the only area to show a net fall in children's home places over this reporting period, with 5 places registered, and 7 places deregistered. The 7 deregistered places were all for-profit provision.

3. **As of 30 September 2025, there are 44 fostering services registered in Wales offering 3,538 fostering households and 6,123 fostering places. Most fostering households and places within Wales are operated by not-for-profit organisations.**

- Of the 44 registered fostering services in Wales, 22 are operated by local authorities. The remainder are provided by Independent Fostering Agencies (IFAs). Of those 5 are not-for-profit organisations and 17 are for-profit organisations. Of the 3,538 fostering households, 2,545 (or 72%) are provided by local authorities. Of the 6,123 fostering places, 4,027 (or 66%) are provided by local authorities. A significant proportion of the households (1,079 or 42%) and places (1,560 or 39%) provided by local authorities are within kinship or 'connected persons' foster care. The remaining 1,466 households and 2,467 places provide mainstream foster care.

- Regarding IFA households and places, 815 households (23%) and 1732 places (28%) are provided by for-profit organisations, 178 (5%) households and 364 (6%) places are provided by other not-for-profit organisations.

- By region, North Wales contains the greatest number of fostering households 771 (22%) in Wales but the greatest number of places are found within Gwent with 1,264 places (or 21% of all provision). Within a local authority footprint, the greatest concentration of fostering provision occurred within Cardiff. The area recorded 358 households (10% of the national figure) and 707 places (12% of the national figure). Cardiff also has 109 households (13%) and 244 (14%) places that are for-profit. Carmarthenshire also contained a considerable amount of for-profit provision, with 75 (9%) households and 164 (10%) places. Flintshire and Wrexham meanwhile do not have any not-for-profit IFA provision in their areas.

- There has been a net fall (19 in total, 7 of whom were IFAs) in not-for profit mainstream fostering households over the reporting period. There has been an increase in for-profit mainstream fostering households (by 21) in the same period.

Section 1 - Number of registered children's services, places and households for residential care, fostering and secure accommodation

Table 1a: Number of registered children's home services and registered maximum places (as of 30 September 2025)

Source: CIW

Regional and Local authority area	Number of registered children's home services				Number of registered maximum places in children's homes			
	Not for-Profit (Local Authority)	Not-For-Profit (Other)	For-Profit	Total	Not for-Profit (Local Authority)	Not-For-Profit (Other)	For-Profit	Total
Cardiff and Vale	*10*	*1*	*28*	*39*	*27*	*2*	*116*	*145*
Cardiff	10	0	15	25	27	0	68	95
Vale of Glamorgan	0	1	13	14	0	2	48	50
Cwm Taf Morgannwg	*16*	*2*	*46*	*64*	*50*	*2*	*145*	*197*
Bridgend	5	2	15	22	19	2	45	66
Merthyr Tydfil	2	0	9	11	3	0	26	29
Rhondda Cynon Taf	9	0	22	31	28	0	74	102
Gwent	*19*	*0*	*65*	*84*	*71*	*0*	*182*	*253*
Blaenau Gwent	1	0	17	18	4	0	42	46
Caerphilly	7	0	9	16	21	0	30	51
Monmouthshire	2	0	12	14	9	0	39	48
Newport	9	0	12	21	37	0	39	76
Torfaen	0	0	15	15	0	0	32	32
West Wales	*6*	*1*	*26*	*33*	*22*	*6*	*93*	*121*
Carmarthenshire	3	0	17	20	13	0	56	69
Ceredigion	1	1	0	2	3	6	0	9
Pembrokeshire	2	0	9	11	6	0	37	43
North Wales	*16*	*0*	*69*	*85*	*51*	*0*	*255*	*306*
Conwy	3	0	8	11	15	0	27	42
Denbighshire	0	0	10	10	0	0	47	47
Flintshire	5	0	21	26	12	0	68	80
Gwynedd	1	0	6	7	6	0	39	45
Isle of Anglesey	4	0	2	6	7	0	7	14
Wrexham	3	0	22	25	11	0	67	78
West Glamorgan	*2*	*0*	*45*	*47*	*4*	*0*	*173*	*177*
Neath Port Talbot	0	0	21	21	0	0	83	83
Swansea	2	0	24	26	4	0	90	94
Powys	*5*	*3*	*15*	*23*	*13*	*10*	*69*	*92*
TOTAL	*74*	*7*	*294*	*375*	*238*	*20*	*1,033*	*1,291*

Table 1a - Data explanation

1.1. Table 1a shows a total of 375 registered children's home services in Wales as of 30 September 2025. Collectively these provide up to 1,291 registered places. Most of the services (294 or 78% of all children's home services) and places (1,033 or 80% of all children's home places) are provided by for-profit providers.

Table 1b: Number of registered fostering services, foster care households and registered maximum places (as of 30 September)

Sources:
1 Registered Services – CIW
2 Local Authority households and places – Foster Wales
3 Non-local authority registered households and places - 4Cs

Region and local authority area	Number of registered foster care services			Number of registered foster care households			Maximum number of foster care places		
	Not-For-Profit (Local Authority)	1 Not-For-Profit (Other)	1 For-Profit	2 Not-For-Profit-(Local Authority)	3 Not-For-Profit (Other)	3 For-Profit	2 Not-For-Profit (Local Authority)	3 Not-For-Profit-(Other)	3 For-Profit
Cardiff and Vale	*2*	*3*	*4*	*343*	*40*	*151*	*567*	*86*	*340*
Cardiff	1	3	4	222	28	109	404	61	244
Vale of Glamorgan	1	0	0	121	12	42	163	25	96
Cwm Taf Morgannwg	*3*	*0*	*1*	*410*	*43*	*135*	*669*	*91*	*286*
Bridgend	1	0	0	126	9	63	175	17	135
Merthyr Tydfil	1	0	0	43	1	10	81	4	20
Rhondda Cynon Taf	1	0	1	241	33	62	413	70	131
Gwent	*5*	*1*	*1*	*564*	*45*	*119*	*934*	*86*	*246*
Blaenau Gwent	1	0	0	74	8	12	124	12	22
Caerphilly	1	1	0	145	13	37	248	23	83
Monmouthshire	1	0	0	58	3	21	106	8	44
Newport	1	0	1	143	17	34	242	35	68
Torfaen	1	0	0	144	4	15	214	8	29
West Wales	*3*	*0*	*2*	*254*	*15*	*115*	*462*	*35*	*245*
Carmarthenshire	1	0	2	104	5	75	216	10	164
Ceredigion	1	0	0	48	7	15	73	18	32
Pembrokeshire	1	0	0	102	3	25	173	7	49
North Wales	*6*	*1*	*6*	*535*	*14*	*223*	*731*	*26*	*475*
Conwy	1	1	2	81	8	54	94	17	119
Denbighshire	1	0	1	52	2	56	95	1	125
Flintshire	1	0	1	122	0	55	155	0	118
Gwynedd	1	0	0	136	2	9	190	3	17
Isle of Anglesey	1	0	0	60	2	21	88	5	45
Wrexham	1	0	2	84	0	28	109	0	51
West Glamorgan	*2*	*0*	*0*	*352*	*18*	*61*	*520*	*33*	*116*
Neath Port Talbot	1	0	0	127	12	29	192	22	56
Swansea	1	0	0	225	6	32	328	11	60
Powys	*1*	*0*	*0*	*87*	*3*	*11*	*144*	*7*	*24*
Outside of Wales	0	0	3	0	0	0	0	0	0
TOTAL	*22*	*5*	*17*	*2,545*	*178*	*815*	*4,027*	*364*	*1,732*

Table 1b - Data explanation

<u>Notes on data gathering</u>

Data Provided by CIW

1.2. CIW register IFAs (which can be provided by either for-profit or not-for-profit organisations) in Wales but not fostering services provided by local authorities. There are three for-profit fostering providers who are located outside of Wales but provide services in Wales and are therefore registered in Wales.

Data provided by the 4Cs

1.3. To obtain their data, the 4Cs asked all IFAs on their Children's Commissioning Support Resource (CCSR) system to provide information on the number of registered fostering households and maximum number of places. 20 out of the 22 registered IFAs provided data. Data shows the number of fostering households by the local authority area in which they live. Data was not available for the remaining 2 IFAs as they are not registered on the CCSR system.

Data Provided by Foster Wales

1.4 The figures provided are for all approved local authority foster carers and places i.e. the total of both approved mainstream and approved connected persons (kinship)[1] foster carers. Figures are available on a local authority basis.

1.5 A full breakdown of Foster Wales households and placement data is explored more fully under table 1c and section 3.

<u>Number of registered foster care services</u>

1.6 Although each local authority has its own fostering service, all work together within the national network of Foster Wales. There are 44 registered foster care providers across Wales. Of these, the number of local authority fostering services will therefore always remain at a maximum of 22, in line with the number of local authorities.

1.7 As of 30 September 2025, there were 5 not-for-profit IFAs (or 11% of the total registered) and 17 (or 39% of the total registered) for-profit IFAs. In the previous

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[1] Connected persons foster carers are generally court directed and provide places for specific children, usually part of the child's family / network, and are not available for general use.

report there were 6 not-for-profit IFAs and 16 for-profit services as of 31 March 2025.

1.8 By region North Wal4es has the highest number of for-profit fostering services, amounting to 6 or 35% of all services, across Conwy, Wrexham, Flintshire and Denbighshire. 4 (or 24%) of for-profit fostering services were also situated within the Cardiff local authority area.

Foster care households and maximum number of foster care places

1.9 There are 3,538 fostering households and 6,123 places in Wales. Local authorities comprise 2,545 (72%) of those households, and 4,027 (66%) of places. Of the remaining 993 IFA households, 815 (23%) were for-profit registered households and 178 (5%) were other not-for-profit. Similarly, of the remaining 2,096 IFA places, 1,732 (or 28%) were for-profit and the remaining 364 (or 6%) were other not-for-profit.

1.10 Given the lack of local authority fostering data in the previous report, comparisons in this area can only be made at a national level. They show a slight decrease on the 2,609 places (by 64, or 2%) and 4,144 places (by 117, or 3%) reported as of 31 March 2025. There was also a slight decrease in not-for-profit IFA provision, down by 11 (or 6%) households, and 24 (also 6%) places. There has been an increase in for-profit provision, however, by 21 (or 3%) households and 39 (2%) places.

<u>Local observations</u>

1.11 By region Gwent provides the greatest numbers of local authority registered foster care households and places (564 or 22% of households and 934 or 23% of places). They are followed by North Wales (535 or 21% of households and 731 or 18% of households).

1.12 On a local authority footprint, most local authority registered foster care provision is situated in Rhondda Cynon Taf (241 households, 413 places), Swansea (225 households, 328 places) and Cardiff areas (222 households, 404 places). These areas each represent around 9% of all local authority registered households and between 8-10% of places across Wales.

1.13 The greatest proportion of for-profit foster care households (223) and places (475) resides across North Wales. Collectively this region makes up 27% of all for-profit places, with concentrations occurring in Conwy with 54 households and 119 places, Denbighshire with 56 households and 125 places and Flintshire with 55 households and 118 places. Each of those areas account for 7% of the total number of for-profit households and places.

1.14 The greatest proportion of non-local authority registered foster care provision can be found in the Cardiff local authority area with 28 (16%) IFA not-for profit households and 61 (or 17%) IFA places, alongside 109 for-profit households (13%) and 244 (14%) places. Carmarthenshire also contains a high number of for-profit foster care provision, with 75 (or 9%) of households and 164 (or 10%) of places.

Secure accommodation services

1.15 As of 30 September 2025, and in line with the observations in the previous report, there is one secure accommodation service registered in Wales. This is local authority operated and registered for a maximum of 14 places. However, this facility services both the secure estate in England and Wales and as such receives referrals and children from across both countries.

Table 1c: Local authority registered fostering households and places broken down by mainstream and connected persons provision (as of 30 September).

Source: Foster Wales

Regional total and local authority area	Fostering Households			Fostering Places		
	Mainstream Fostering	*Connected persons*	**Total Households** (*see table 1b)	*Mainstream Fostering*	*Connected Persons*	**Total Places** (*see table 1b)
Cardiff and Vale	*162*	*181*	*343*	*269*	*298*	*567*
Cardiff	114	108	**222**	210	194	**404**
Vale of Glamorgan	48	73	**121**	59	104	**163**
Cwm Taf Morgannwg	*203*	*207*	*410*	*352*	*317*	*669*
Bridgend	62	64	**126**	91	84	**175**
Merthyr Tydfil	25	18	**43**	53	28	**81**
Rhondda Cynon Taf	116	125	**241**	208	205	**413**
Gwent	*374*	*190*	*564*	*670*	*264*	*934*
Blaenau Gwent	48	26	**74**	83	41	**124**
Caerphilly	79	66	**145**	162	86	**248**
Monmouthshire	43	15	**58**	83	23	**106**
Newport	116	27	**143**	207	35	**242**
Torfaen	88	56	**144**	135	79	**214**
West Wales	*152*	*102*	*254*	*313*	*149*	*462*
Carmarthenshire	87	17	**104**	186	30	**216**
Ceredigion	20	28	**48**	36	37	**73**
Pembrokeshire	45	57	**102**	91	82	**173**
North Wales	*296*	*239*	*535*	*428*	*303*	*731*
Conwy	47	34	**81**	52	42	**94**
Denbighshire	36	16	**52**	74	21	**95**
Flintshire	66	56	**122**	81	74	**155**
Gwynedd	74	62	**136**	123	67	**190**
Isle of Anglesey	36	24	**60**	46	42	**88**
Wrexham	37	47	**84**	52	57	**109**
West Glamorgan	*221*	*131*	*352*	*331*	*189*	*520*
Neath Port Talbot	95	32	**127**	139	53	**192**
Swansea	126	99	**225**	192	136	**328**
Powys	*58*	*29*	*87*	*104*	*40*	*144*
TOTAL	***1,466***	***1,079***	***2,545***	***2,467***	***1,560***	***4,027***

Table 1c - Data explanation

1.16   As per table 1b as of 30 September 2025 local authorities provide 2,545 fostering households and 4,027 places. 1,079 or 42% of those households and 1,560 or 39% of those places, are within 'connected persons' foster care whereas all IFA provision is within mainstream fostering.

1.17   Foster Wales report that the numbers of mainstream foster carer approvals in 2025/26 increased by 6% compared to the same period in 2024/25. They also noted that the net loss of mainstream foster carers has slowed since Foster Wales was established; the net loss of mainstream households reduced from – 11 in 2024/25 to -8 in 2025/26.

1.18   The level of assessment activity for connected persons foster carers remains significantly higher than for mainstream foster carers. These assessments are often afforded higher priority than mainstream assessments but do not provide places that are generally available to all children. The number of these places continues to grow. In the first 6 months of this year, there was a net gain of 28 households and 43 places.

1.19   The analysis in Section 1 and data in Table 1b noted that Gwent contained the greatest amount of overall local authority registered foster care households and places. Table 1c notes that Gwent provides the greatest amount of local authority registered mainstream foster care, with 374 (26%) of those households and 670 (27%) of those places.

1.20   In terms of the more specific fostering provision, Rhondda Cynon Taf provides the highest concentration of connected persons care (125 households, 205 places or 12% and 13% of the national figures respectively). Table 1c shows high concentrations of mainstream fostering care across Cardiff (114 households, 210 places), Swansea (126 households, 192 places), Rhondda Cynon Taf (116 households, 208 places) and Newport (116 households, 207 places), with each area containing between 8-9% of provision. Ceredigion retains the lowers amount of mainstream care (20 households, 36 places around 1% of the national totals).

Section 2 – Market entrants and exits - children's homes

Table 2a: Registered children's home services entering and leaving the market between 1 April 2025 and 30 September 2025

Source: CIW

Regional total and local authority area	Number of registered services entering the market			Number of registered services leaving the market		
	Not-for-profit - local authority	Not-for-profit - other	For-profit	Not-for-profit - local authority	Not-for-profit - other	For-profit
Cardiff and Vale	*2*	*0*	*2*	*0*	*0*	*1*
Cardiff	2	0	1	0	0	1
Vale of Glamorgan	0	0	1	0	0	0
Cwm Taf Morgannwg	*0*	*1*	*0*	*0*	*0*	*0*
Bridgend	0	1	0	0	0	0
Merthyr Tydfil	0	0	0	0	0	0
Rhondda Cynon Taf	0	0	0	0	0	0
Gwent	*4*	*0*	*9*	*0*	*0*	*2*
Blaenau Gwent	1	0	1	0	0	1
Caerphilly	0	0	2	0	0	0
Monmouthshire	2	0	2	0	0	1
Newport	1	0	2	0	0	0
Torfaen	0	0	2	0	0	0
West Wales	*1*	*0*	*2*	*0*	*0*	*1*
Carmarthenshire	0	0	1	0	0	0
Ceredigion	1	0	0	0	0	0
Pembrokeshire	0	0	1	0	0	1
North Wales	*2*	*0*	*5*	*0*	*0*	*2*
Conwy	2	0	2	0	0	0
Denbighshire	0	0	0	0	0	0
Flintshire	0	0	3	0	0	2
Gwynedd	0	0	0	0	0	0
Isle of Anglesey	0	0	0	0	0	0
Wrexham	0	0	0	0	0	0
West Glamorgan	*0*	*0*	*2*	*0*	*0*	*0*
Neath Port Talbot	0	0	0	0	0	0
Swansea	0	0	2	0	0	0
Powys	*0*	*1*	*1*	*0*	*0*	*1*
TOTAL	*9*	*2*	*21*	*0*	*0*	*7*

Table 2a - Data explanation

2.1. Table 2a shows the number of registered children's home services entering and leaving the market in Wales between 1 April 2025 and 30 September 2025.

Number of registered children's home services entering the market

2.2. The table shows a total of 32 children's home services entering the market, with 21 (or 66%) being for-profit and 11 (or 34%) not-for profit. Of those not-for-profit services, 9 were registered to a local authority and 2 were not.

2.3. The Gwent region saw the greatest number of registered services entering the market with 13 new services (4 new local authority not-for-profit and 9 new for-profit services, representing 41% of all provision). Newly registered for-profit services were located within each of Gwent's 5 local authorities, and all bar Caerphilly and Torfaen saw entrants registered to the local authority.

2.4. Elsewhere there were high numbers of entrants in North Wales. The Conwy local area saw 2 local authority registered and 2 for-profit services, and a further 3 for-profit entrants were recorded in Flintshire. Only 2 non-local authority not-for-profit services were registered during the period, in Powys and in Bridgend.

2.5. This data contrasts with the previous reporting period, which saw fewer services (25) entering the market. At the time, 21 of those entrants were for-profit with the remaining 4 being local authority registered not-for-profit services.

Number of registered children's home services leaving the market

2.6. 7 children's home services (all for-profit) left the market. 2 of these were in Flintshire, 1 each in Blaenau Gwent, Cardiff, Monmouthshire, Pembrokeshire and Powys. These numbers mark an increase over those recorded during the previous 6-month period where 4 providers (all for-profit) left the market.

Table 2b: Registered Children's Home places added to and removed from the market between 1 April 2025 and 30 September 2025

Source: CIW

Regional total and local authority area	Number of registered children's home places added to the market			Number of registered children's home places removed from the market		
	Not-for-profit - local authority	*Not-for-profit - other*	*For-profit*	*Not-for-profit - local authority*	*Not-for-profit - other*	*For-profit*
Cardiff and Vale	**5**	**0**	**8**	**0**	**0**	**3**
Cardiff	5	0	4	0	0	3
Vale of Glamorgan	0	0	4	0	0	0
Cwm Taf Morgannwg	**0**	**1**	**0**	**0**	**0**	**0**
Bridgend	0	1	0	0	0	0
Merthyr Tydfil	0	0	0	0	0	0
Rhondda Cynon Taf	0	0	0	0	0	0
Gwent	**19**	**0**	**23**	**0**	**0**	**2**
Blaenau Gwent	4	0	2	0	0	1
Caerphilly	0	0	8	0	0	0
Monmouthshire	9	0	4	0	0	1
Newport	6	0	6	0	0	0
Torfaen	0	0	3	0	0	0
West Wales	**3**	**0**	**8**	**0**	**0**	**3**
Carmarthenshire	0	0	4	0	0	0
Ceredigion	3	0	0	0	0	0
Pembrokeshire	0	0	4	0	0	3
North Wales	**5**	**0**	**15**	**0**	**0**	**2**
Conwy	5	0	8	0	0	0
Denbighshire	0	0	0	0	0	0
Flintshire	0	0	7	0	0	2
Gwynedd	0	0	0	0	0	0
Isle of Anglesey	0	0	0	0	0	0
Wrexham	0	0	0	0	0	0
West Glamorgan	**0**	**0**	**6**	**0**	**0**	**0**
Neath Port Talbot	0	0	0	0	0	0
Swansea	0	0	6	0	0	0
Powys	**0**	**4**	**1**	**0**	**0**	**7**
TOTAL	**32**	**5**	**61**	**0**	**0**	**17**

Table 2c: Net gain/loss of registered children's home services and places between 1 April 2025 and 30 September 2025

Source: CIW

Regional total and local authority area	Children's home services			Total registered places		
	Not-for-profit - local authority	*Not-for-profit - other*	*For-profit*	*Not-for-profit - local authority*	*Not-for-profit - other*	*For-profit*
Cardiff and Vale	*2*	*0*	*1*	*5*	*0*	*5*
Cardiff	2	0	0	5	0	1
Vale of Glamorgan	0	0	1	0	0	4
Cwm Taf Morgannwg	*0*	*1*	*0*	*0*	*1*	*0*
Bridgend	0	1	0	0	1	0
Merthyr Tydfil	0	0	0	0	0	0
Rhondda Cynon Taf	0	0	0	0	0	0
Gwent	*4*	*0*	*7*	*19*	*0*	*21*
Blaenau Gwent	1	0	0	4	0	1
Caerphilly	0	0	2	0	0	8
Monmouthshire	2	0	1	9	0	3
Newport	1	0	2	6	0	6
Torfaen	0	0	2	0	0	3
West Wales	*1*	*0*	*1*	*3*	*0*	*5*
Carmarthenshire	0	0	1	0	0	4
Ceredigion	1	0	0	3	0	0
Pembrokeshire	0	0	0	0	0	1
North Wales	*2*	*0*	*3*	*5*	*0*	*13*
Conwy	2	0	2	5	0	8
Denbighshire	0	0	0	0	0	0
Flintshire	0	0	1	0	0	5
Gwynedd	0	0	0	0	0	0
Isle of Anglesey	0	0	0	0	0	0
Wrexham	0	0	0	0	0	0
West Glamorgan	*0*	*0*	*2*	*0*	*0*	*6*
Neath Port Talbot	0	0	0	0	0	0
Swansea	0	0	2	0	0	6
Powys	*0*	*1*	*0*	*0*	*4*	*-6*
TOTAL	*9*	*2*	*14*	*32*	*5*	*44*

Tables 2b and 2c - Data explanation

2.7.   Table 2b shows the number of registered children's home places added to and removed from the market in Wales. Table 2c provides a net gain/loss comparison of registered places and homes joining and leaving the market. For context services can have multiple places as part of their registration which is why the figures within this table are greater than those in Table 2a.

2.8.   98 places were added and 17 places removed from the market. Of those new places 61 (62%) were for-profit. 32 (33%) were local authority places and 5 (5%) were other not-for-profit places. All those leaving the market were for-profit places.

New Children's home places entering the market

2.9.   By region Gwent contains the greatest proportion of new children's home places with 19 (59%) of all local authority places and 23 (38%) for-profit places. Of the 19 new places, 9 were in Monmouthshire, 6 in Newport and 4 in Blaenau Gwent. Of the 23 new for-profit places, Caerphilly recorded 8, Newport 6, Monmouthshire 4, Torfaen 3 and Blaenau Gwent 2.

2.10.   North Wales saw 15 new for-profit children's home places (25% of all new for-profit places in Wales), and 5 new local authority places (16% of new for-profit places in Wales). These were concentrated in Conwy (8 for-profit, 5 local authority places) and Flintshire (7 for-profit places). Other localities that saw new places included Cardiff (5 local authority, 4 for-profit places), Swansea (6 for-profit places), the Vale of Glamorgan, Pembrokeshire and Carmarthenshire (4 for-profit places each).

2.11.   Overall, the 98 additional children's home places represent a 72% increase on the 57 places recorded across Wales over the previous 6 months. Collectively the 37 not-for-profit places, registered to either a local authority or independently, represent a 640% increase over the 5 recorded in the previous 6-month reporting period.

Children's home places leaving the market

2.12.   All 17 children's home places leaving the market within this reporting period are for-profit. These for-profit exits have occurred in Powys (7), Flintshire (2), Cardiff (3) and Pembrokeshire (3), and 1 each in Monmouthshire and Blaenau Gwent. Powys was the only area to show a net fall in places entering or leaving the market (-6: 1 entering, 7 leaving).

2.13. The 17 children's home places leaving the market is an increase (143%) on the 7 for-profit places that left during the previous 6-month period. However, the lack of not-for-profit places leaving the market in this reporting period contrasts with the 4 recorded not-for-profit exits during the previous reporting period (which represented 36% of exits at the time).

Section 3 – Market entrants and exits - fostering

3.1 No fostering services entered or left the market between 1 April 2025 and 30 September 2025, the same as the previous reporting period.

Fostering households entering and leaving the market

3.2 Data for this report includes the placement activity for local authority mainstream and connected persons (also known as kinship) foster carers. Both elements are reported separately.

Table 3a: Local authority registered fostering households (by type of provision) entering and leaving the market between 1 April 2025 and 30 September 2025.

Source: Foster Wales

Regional total and local authority area	Mainstream Fostering Households			Connected Persons Households		
	entering the market	leaving the market	net changes	entering the market	leaving the market	net changes
Cardiff and Vale	*7*	*9*	*-2*	*27*	*28*	*-1*
Cardiff	7	9	-2	20	17	3
Vale of Glamorgan	0	0	0	7	11	-4
Cwm Taf Morgannwg	*9*	*15*	*-6*	*23*	*25*	*-2*
Bridgend	4	3	1	8	8	0
Merthyr Tydfil	1	2	-1	0	5	-5
Rhondda Cynon Taf	4	10	-6	15	12	3
Gwent	*16*	*27*	*-11*	*45*	*38*	*7*
Blaenau Gwent	3	2	1	7	6	1
Caerphilly	3	4	-1	16	6	10
Monmouthshire	6	3	3	4	5	-1
Newport	3	9	-6	8	5	3
Torfaen	1	9	-8	10	16	-6
West Wales	*9*	*3*	*6*	*29*	*10*	*19*
Carmarthenshire	3	1	2	7	6	1
Ceredigion	2	1	1	8	2	6
Pembrokeshire	4	1	3	14	2	12
North Wales	*18*	*10*	*8*	*20*	*18*	*2*
Conwy	4	1	3	1	1	0
Denbighshire	1	2	-1	3	2	1
Flintshire	4	2	2	1	4	-3
Gwynedd	4	4	0	6	0	6
Isle of Anglesey	2	0	2	3	2	1
Wrexham	3	1	2	6	9	-3
West Glamorgan	*13*	*11*	*2*	*8*	*5*	*3*
Neath Port Talbot	2	3	-1	6	4	2
Swansea	11	8	3	2	1	1
Powys	*0*	*4*	*-4*	*4*	*3*	*1*
TOTAL	**72**	**79**	**-7**	**156**	**127**	**29**

<u>Table 3b: Local authority registered fostering places (by type of provision) entering and leaving the market between 1 April 2025 and of 30 September 2025).</u>

Source: Foster Wales

Regional total and local authority area	Mainstream Fostering Places			Connected Persons Places		
	entering the market	*leaving the market*	*net changes*	*entering the market*	*leaving the market*	*net changes*
Cardiff and Vale	*12*	*12*	*0*	*35*	*37*	*-2*
Cardiff	12	12	0	27	24	3
Vale of Glamorgan	0	0	0	8	13	-5
Cwm Taf Morgannwg	*13*	*23*	*-10*	*33*	*35*	*-2*
Bridgend	4	4	0	8	11	-3
Merthyr Tydfil	2	3	-1	0	9	-9
Rhondda Cynon Taf	7	16	-9	25	15	10
Gwent	*19*	*39*	*-20*	*68*	*63*	*5*
Blaenau Gwent	3	2	1	12	6	6
Caerphilly	4	7	-3	21	9	12
Monmouthshire	8	3	5	15	20	-5
Newport	3	14	-11	9	5	4
Torfaen	1	13	-12	11	23	-12
West Wales	*10*	*5*	*5*	*43*	*14*	*29*
Carmarthenshire	3	2	1	14	7	7
Ceredigion	2	2	0	10	2	8
Pembrokeshire	5	1	4	19	5	14
North Wales	*27*	*15*	*12*	*27*	*20*	*7*
Conwy	4	1	3	2	1	1
Denbighshire	2	4	-2	3	2	1
Flintshire	6	2	4	1	4	-3
Gwynedd	6	6	0	9	0	9
Isle of Anglesey	6	0	6	4	2	2
Wrexham	3	2	1	8	11	-3
West Glamorgan	*15*	*15*	*0*	*12*	*7*	*5*
Neath Port Talbot	3	4	-1	10	5	5
Swansea	12	11	1	2	2	0
Powys	*0*	*6*	*-6*	*5*	*3*	*2*
TOTAL	*96*	*115*	*-19*	*223*	*179*	*44*

Tables 3a and 3b - Data explanation

Mainstream Fostering

3.3   This reporting period saw a net fall in mainstream local authority registered fostering provision of 7 households and 19 places. The provision of connected persons fostering meanwhile saw a net increase of 29 households and 44 places.

3.4   The Gwent region saw the greatest net fall in mainstream fostering with a decrease of 11 households and 20 places. At a local authority level, Torfaen saw the biggest drop of any local authority, by 8 households and 12 places, followed by Newport (6 households, 11 places).

3.5   North Wales (8 households, 12 places) and West Wales (6 households, 5 places) saw the greatest regional net increases. Within those areas, Isle of Anglesey (2 households, 6 places), Pembrokeshire (by 3 households, 4 places) Conwy (by 3 households, 3 places) and Flintshire (2 households, 4 places) were notable local examples.

Connected Persons

3.6   West Wales saw the greatest rise in provision related to connected persons care (by 19 households, 29 places). The two regions that saw an overall decline in provision were Cardiff and Vale (by 1 household, 2 places) and Cwm Taf Morgannwg (by 2 households, 2 places).

3.7   Torfaen experienced the biggest fall within a local area (by 6 households and 12 places) in provision related to connected person's care. Conversely the biggest local increases were seen in Pembrokeshire (by 12 households, 14 places) and Caerphilly (by 10 households, 12 places).

Table 3c: IFA registered fostering households entering and leaving the market between 1 April 2025 and 30 September 2025.

Source: 4Cs

Regional total and local authority area	Not-for-profit fostering households			For-profit fostering households		
	entering the market	leaving the market	net changes	entering the market	leaving the market	net changes
Cardiff and Vale	*2*	*6*	*-4*	*12*	*4*	*8*
Cardiff	2	6	-4	11	3	8
Vale of Glamorgan	0	0	0	1	1	0
Cwm Taf Morgannwg	*2*	*5*	*-3*	*5*	*5*	*0*
Bridgend	0	2	-2	2	2	0
Merthyr Tydfil	0	0	0	0	1	-1
Rhondda Cynon Taf	2	3	-1	3	2	1
Gwent	*3*	*6*	*-3*	*11*	*4*	*7*
Blaenau Gwent	0	2	-2	2	0	2
Caerphilly	2	1	1	2	0	2
Monmouthshire	0	0	0	3	1	2
Newport	1	3	-2	3	0	3
Torfaen	0	0	0	1	3	-2
West Wales	*1*	*1*	*0*	*7*	*5*	*2*
Carmarthenshire	0	0	0	4	1	3
Ceredigion	0	1	-1	0	0	0
Pembrokeshire	1	0	1	3	4	-1
North Wales	*2*	*2*	*0*	*17*	*18*	*-1*
Conwy	0	1	-1	4	3	1
Denbighshire	1	0	1	7	4	3
Flintshire	0	0	0	2	5	-3
Gwynedd	0	0	0	0	1	-1
Isle of Anglesey	1	0	1	2	3	-1
Wrexham	0	1	-1	2	2	0
West Glamorgan	*1*	*1*	*0*	*6*	*3*	*3*
Neath Port Talbot	1	1	0	1	1	0
Swansea	0	0	0	5	2	3
Powys	*0*	*1*	*-1*	*3*	*1*	*2*
TOTAL	*11*	*22*	*-11*	*61*	*40*	*21*

Table 3c - Data explanation

3.8   All IFA placements are mainstream fostering, and do not relate to connected persons. The data collected here is not part of a formal or regulated process, but part of intelligence gathered by the 4Cs in their interactions with IFAs and which informs their Children's Commissioning Support Resource (CCSR) database.

3.9   The data in this table is based on a cross-referencing exercise between 1 April 2025 and 30 September 2025 to identify entrants and exits on CCSR. Whilst the table identifies the number of households that have exited and entered the market, it does not account for any changes to the number of places within those households during the period.

3.10   A refined method that can account for capacity changes of already-existing provision will be developed for the next report.

Fostering households entering and leaving the market

3.11   Across Wales, 11 not-for-profit fostering households entered the market in the reporting period and 22 left. By contrast 61 for-profit fostering households entered the market and 40 left, resulting in a net gain of 21 for-profit households.

3.12   The regions that saw a net loss in terms of not-for-profit fostering households were Cardiff and Vale (4 households), Cwm Taf Morgannwg (3), Gwent (3) and Powys (1). Local concentrations of those net losses included Cardiff (a loss of 4), Bridgend, Blaenau Gwent and Newport (each area experiencing a loss of 2).

3.13   The Cardiff and Vale region recorded the greatest net gain (8) of for-profit fostering households, with 12 households entering the market and 4 leaving. Gwent recorded the second-highest net gain of this type of provision, with 11 entrants and 4 leavers, resulting in a net gain of 7 for-profit households over the same period. The greatest number of for-profit entrants overall was recorded in North Wales, with 17 entrants, but it also experienced 18 households leaving the market over the same period.

3.14   Locally the greatest changes were recorded in Cardiff, with 11 new for-profit households and 3 leavers in this period. Only Merthyr Tydfil, Ceredigion and Gwynedd recorded no new for-profit households.

Section 4 – Stability of Places

Table 4a: Number of placements experienced during the year by children looked after on 31 March 2024 (as a number and percentage) *

Source: Welsh Government (via StatsWales)

Regional total and local authority area	Number of children with 1 placement	Number of children with 2 placements	Number of children with 3+ placements	Percentage of children with 1 placement	Percentage of children with 2 placements	Percentage of children with 3+ placements
Cardiff and Vale	*970*	*270*	*130*	*71*	*20*	*9*
Cardiff	735	210	90	71	20	9
Vale of Glamorgan	235	60	40	70	18	12
Cwm Taf Morgannwg	*945*	*180*	*80*	*78*	*15*	*7*
Bridgend	280	65	25	76	18	6
Merthyr Tydfil	165	25	10	83	13	4
Rhondda Cynon Taf	500	90	45	79	14	7
Gwent	*1,160*	*280*	*135*	*74*	*18*	*9*
Blaenau Gwent	160	30	10	80	15	5
Caerphilly	355	85	35	75	18	7
Monmouthshire	150	30	20	75	15	10
Newport	240	75	35	69	21	10
Torfaen	255	60	35	72	18	10
West Wales	*475*	*120*	*55*	*73*	*18*	*8*
Carmarthenshire	185	50	20	72	20	8
Ceredigion	105	25	5	75	20	5
Pembrokeshire	185	45	30	71	17	12
North Wales	*1,035*	*240*	*140*	*73*	*17*	*10*
Conwy	155	50	20	69	23	8
Denbighshire	145	45	25	68	21	11
Flintshire	170	35	30	73	14	13
Gwynedd	225	35	20	80	13	7
Isle of Anglesey	120	20	10	81	13	6
Wrexham	220	55	35	71	18	11
West Glamorgan	*560*	*130*	*50*	*76*	*18*	*7*
Neath Port Talbot	195	40	15	78	16	6
Swansea	365	90	35	75	18	7
Powys	*170*	*45*	*30*	*69*	*18*	*13*
TOTAL	*5,315*	*1,265*	*620*	*74*	*18*	*9*

*Individual local authority numbers are rounded to the nearest 5. Regional totals and percentages are calculated based on rounded local authority figures whilst the Wales total is based on unrounded numbers. To note the total percentages may not sum to 100% because of rounding to the nearest whole number.

Notes:

4.1. This data has not been updated following the production of the last report in April 2025. This is because this data is only collected once per annum by the Welsh Government. Updated data up to 31 March 2025 is currently being collated and should be included in the next iteration of the report.

4.2 The data comparisons focus on 2 key measures related to children looked after in Wales. The first measure tracks the total number of children looked after on 31 March 2024 who have experienced either 1, 2 or 3 or more placements during the year. The second measure is the percentage compared to the total number of children looked after in the locality. Local authority figures (but not percentages) are rounded to the nearest 5 for disclosure purposes whilst percentages are calculated from unrounded data. Regional figures and percentages are based on rounded local authority data.

4.3 This metric is crucial for understanding placement and market stability. Children who experience multiple places often face exacerbated feelings of separation and loss, making it harder for them to form meaningful relationships with their carers. The ability to monitor these moves is vital for improving outcomes, as research suggests that children with a high number of placement moves are less likely to achieve academically and fare worse in terms of their psychological, social and health outcomes.

4.4 Having a range of options for the appropriate placement of a child is key to stability and permanence. Children who become looked after suffer from feelings of separation and loss, even if they have been maltreated prior to being looked after. Children who go on to have multiple placements can find these feelings exacerbated.

4.5 However, not all moves within the system are negative. Some moves are necessary to meet the needs of the child and when considering their own wishes and feelings. In some cases, a movement of 2 or more placements is considered a healthy sign of timely care planning rather than drift. A very low proportion of moves can, conversely, indicate a lack of placement choice to allow children to move positively as set out in their care plans and to meet their needs.

Section 5 – Offers of Advocacy

Table 5a: Numbers taking up the active offer of advocacy during the year 2023-24

Source: Welsh Government (via StatsWales)

Regional total and local authority area	Active Offers made during the year	Active Offers made and where an Independent Professional Advocate was provided
Cardiff and Vale	*341*	*205*
Cardiff	265	172
Vale of Glamorgan	76	33
Cwm Taf Morgannwg	*275*	*214*
Bridgend	71	64
Merthyr Tydfil	60	54
Rhondda Cynon Taf	144	96
Gwent	*734*	*367*
Blaenau Gwent	97	45
Caerphilly	202	149
Monmouthshire	98	24
Newport	171	109
Torfaen	166	40
West Wales	*141*	*94*
Carmarthenshire	96	59
Ceredigion	..	..
Pembrokeshire	45	35
North Wales	*922*	*115*
Conwy	494	38
Denbighshire	118	27
Flintshire	156	4
Gwynedd	21	6
Isle of Anglesey	15	10
Wrexham	118	30
West Glamorgan	*153*	*127*
Neath Port Talbot	62	55
Swansea	91	72
Powys	*485*	*223*
TOTAL	*3,051*	*1,345*

Notes:

5.1   As with table 4a on the stability of placements, this data has not been updated following the publication of the last report although as with other areas it has now been presented by region in addition to by local authority. This is because this data is only collected once per annum by Welsh Government. Updated data up to 31 March 2025 is currently being collated by Welsh Government and should be included in the next iteration of the report.

5.2   The Social Services and Well-being (Wales) Act 2014 stipulates that an active offer of advocacy is made to all children and young people who become looked after and all children subject to child protection enquiries that lead to a child protection conference.

5.3.   Children who are in care are also entitled to access independent professional advocacy throughout the time they are cared for. The child, social worker or Independent Reviewing Officer can request a referral be made to an independent professional advocacy service to support the child to have their voice heard as part of the care planning process. This is referred to as 'issue-based advocacy'.

"Active Offers" during the year

5.4.   The first measure in the above table helps local authorities assess the take-up of advocacy services, enabling better future planning and commissioning of those services. Advocacy services assist individuals in receiving care and support and ensures their views are accurately conveyed irrespective of the advocate's or others' opinions.

5.5.   It is defined as the sharing of information about the statutory right and entitlement of a child or young person to access an independent professional advocacy service.

"Active Offers" made and where an Independent Professional Advocate was provided

5.6.   The second measure in this table focuses on the total number of "Active Offers" of advocacy during the year where an independent professional advocate was provided. This metric also enables local authorities to assess the take-up of advocacy services and helps Welsh Government monitor the provision of advocacy to entitled children.

5.7. These measures provide valuable insights into the stability and support provided to children looked after in Wales, highlighting the importance of monitoring placement moves and the take-up of advocacy services to improve outcomes for these children.

5.8. The information provided only refers to where an active offer is made and an independent advocate is provided. Children who were not given an active offer are not included even if they were subsequently provided with an independent professional advocate. Equally children in care who have been referred for independent advocacy as a part of the care planning process (issue-based advocacy/independent visitor) will not be included in these figures.

5.9. At this time, we are unable to disaggregate the data collected by Welsh Government to separate out active offers made to children who are looked after from active offers made to children who are subject to child protection inquiries.

5.10. The data only collates information on the active offer which is specific and takes place at the point a child becomes looked after or subject to a child protection inquiry. It does not include information about how many children who are looked after may have been offered an independent visitor, residential visiting advocacy service or issue-based advocacy.

5.11. The National Forum that oversees the Active Offer comprises local authorities and advocacy providers and there is work ongoing under this forum to further refine and mature data that will provide more in-depth knowledge about the take up of the active offer. This work aims to increase our understanding as to why children may not take up the active offer and identify where awareness raising work may need to be undertaken in local authorities to increase referral rates.