



Policies to address unpaid carer poverty: an evidence review

Carer Poverty Commission

August 2024

A WPI Economics report for the Carer Poverty Commission NI



About the Carer Poverty Commission NI

The Carer Poverty Commission NI was established to better understand the causes of poverty among Northern Ireland's unpaid carer population and to deliver the fresh thinking needed to address it. The Commission is led by Carers NI and has two key goals:

- To examine the scale and drivers of poverty among unpaid carers in Northern Ireland; and
- To design new policy recommendations for the Stormont Assembly and Executive to help tackle that poverty wherever it exists.

For more information, visit: carersuk.org/CarerPovertyNI

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About Carers NI

Carers NI is Northern Ireland's membership body for unpaid carers. We're here to listen, to give carers expert information and tailored advice. We champion the rights of Northern Ireland's 220,000 carers and support them in finding new ways to manage at home, at work, or in their community. We're here to make life better for carers.

About WPI Economics

Founded in 2016, WPI Economics makes an impact through economics that people understand, policy consulting and data insight. We work with a range of organisations – from FTSE 100 companies, to SMEs, charities, central and local government – to help them influence and deliver better outcomes through improved public policy design and delivery.

Our focus is on important social, environmental and economic policy debates, such as tackling poverty and inequality, the future of the green economy, productivity and growth, levelling up and mental health. We are driven by a desire to make a difference, both through the work we do and by taking our responsibilities as a business seriously. We are a Living Wage employer and have recently obtained B Corporation accreditation.

Executive summary

Unpaid carers make a huge contribution to society, saving the Northern Ireland Executive £5.8 billion per year in formal care costs.¹ In spite of the immense contribution unpaid carers bring, many feel isolated and forgotten and, for some, unpaid care comes at a big personal cost. Unpaid carers miss out on employment opportunities; pass up overtime and promotions; give up their pensions; and sacrifice their well-being and health to provide unpaid care. 1 in 3 unpaid carers in Northern Ireland leave paid work to care; 1 in 4 suffer mental ill-health; and, more than 1 in 3 put off treatment for themselves because of the demands of caring.² While the costs of unpaid care are difficult to quantify, evidence shows they are very significant.

International evidence provides a strong case that better support for unpaid carers not only improves their well-being but also brings far-reaching benefits to the government and the economy. In this report, we explore the holistic benefits of (i) statutory paid carer's leave, along with wider flexible working arrangements; (ii) improved design of social security for unpaid carers, and (iii) better provision of paid care; bringing together the evidence from Northern Ireland, the UK, and beyond.

Our headline findings for each of these areas are:

- **Statutory paid leave and other flexible working policies:** compelling evidence shows that these policies have potential to help carers remain in work, resulting in higher tax receipts, lower benefit spending, improved well-being of carers, and lower costs to employers.
- **Improved design of social security:** Currently, social security for unpaid carers does not offer sufficient income replacement and discourages carers from paid employment. A re-design of eligibility rules and a review of support levels is urgently needed, and could increase employment participation, improve carers' well-being, boost growth, and help unpaid carers to escape poverty traps.
- **Better provision of paid care:** Paid care is essential to helping unpaid carers re-join and stay in employment. Even relatively small levels of support can have a big impact on levels of stress, feelings of isolation, and prevalence of mental ill health – all of which pay dividends further down the line, as improved health translates into NHS savings. Sustained, high quality paid care is essential to enable many higher-intensity carers to stay in and go back to employment.

While costs and benefits are subject to uncertainties and difficult to quantify, the available evidence strongly supports the case that policies to help unpaid carers have potential to bring net gain to the economy, with benefits to individuals, businesses, government and society outweighing costs of implementation.

This briefing sets out the case for reform by presenting a collection of studies from around the world that show how helping unpaid carers can benefit everybody.

Our next report, planned for Autumn 2024, will bring together the best available evidence to quantify the benefits of the above policies.

Introduction

Research shows that around two-thirds of people in Northern Ireland will provide unpaid care at some point in their life.³ According to the 2021 Census, 220,000 (around 1 in 8) people in Northern Ireland are unpaid carers, with nearly 70,000 providing more than 50 hours of unpaid care a week. Around 60% of unpaid carers in Northern Ireland are women, and the majority of unpaid carers are aged 45–64 years old. More than half (125,000) of carers in Northern Ireland are in employment.⁴

Unpaid carers are estimated to be saving the NI Executive £5.8 billion per year in care costs.⁵ In spite of the immense value unpaid carers bring, many of them feel unrecognised, isolated and forgotten. Many carers experience poverty, have limited work opportunities and suffer from poor health due to their caring responsibilities:

- Previously, research by WPI Economics for the Carer Poverty Commission Northern Ireland found that the poverty rate for carers in Northern Ireland currently stands at 28.3% – a rate which is considerably higher than poverty rates amongst adults in Northern Ireland who do not have caring roles (17.4%).⁶
- Many carers have to quit their job, reduce their hours, or refuse career growth opportunities due to their caring responsibilities – a problem that disproportionately affects women, and people around the ages of 45–65 years old, a time which usually coincides with career peak.⁷
- The most recent State of Caring survey in Northern Ireland found that more than 4 in 5 unpaid carers report significant stress and anxiety, low mood and irritability. 1 in 4 would rate their mental health as bad or very bad. More than half of carers feel that their physical health has suffered as a result of caring.⁸

Growing shortfalls in social care funding and an ageing population mean the challenges faced by unpaid carers are only going to get worse in the future. The British Medical Association estimates that the population aged 65 years and over is expected to increase by 74.4% between 2014 and 2039.⁹ Meanwhile, vacancies across all programmes of paid care in Northern Ireland are increasing.¹⁰ This means that, unless something changes, unpaid carers will have to step in to fill the growing gap in paid care provision.

The challenge of tackling the shortfall in adequate support for unpaid carers is significant, but the potential rewards are immense. Improved provision of paid care, better design of social security and more generous flexible working policies would unlock unpaid carer's ability to go back into paid work, reducing poverty, improving mental health, and boosting economic growth at the same time. The World Economic Forum has recently called for care to be placed at the heart of the growth agenda of the economy, and identified the care economy as a 'constraint for countries seeking shock-proof growth'. Investments into care, both paid and unpaid, should be seen as strategic, long-term opportunities that foster economic growth.¹¹

This evidence review looks at interventions to help unpaid carers in a broader, holistic context. Mounting evidence shows that the benefits of interventions to help unpaid carers will have benefits far beyond their direct effects on poverty, and will pay growing dividends to the government, businesses, and society over time.

The consequences of unpaid care for carers, government, and businesses

Evidence shows that unpaid caring is costly to the government, businesses, and carers themselves. Research shows:

- **Unpaid carers face large income penalties, which affect them for the rest of their lives.**

Combining unpaid care with paid work is a very difficult task, which means many carers have to leave paid work to care. It has been estimated that, in Northern Ireland, 1 in 3 people with caring roles have been forced to leave employment because of the demands of caring.¹² Unpaid carers face significant income losses due to reduced working hours, lower earnings, and lower pensions. A study by the Joseph Rowntree Foundation estimated that unpaid carers face income penalties of £400 per month in the UK.¹³ Other studies found that carers and former carers were at a higher risk of poverty later in life.¹⁴

- **Unpaid carers suffer from negative mental and physical health consequences due to caring.**

Evidence shows the prevalence of mental health problems among carers is 20% higher than among non-carers – and another 20% higher amongst high-intensity care-givers.¹⁵ Non-working caregivers are more likely to report depressive symptoms than working caregivers. Younger carers (those aged 16–44 years old) are at an increased risk of mental health issues, whereas older carers were more at risk of poor physical health.¹⁶

- **Unpaid carers are more likely than the general population to be in debt.**

Evidence shows that, across the UK, 1 in 6 (16%) unpaid carers are in debt due to their caring role. This rises considerably among those carers in receipt of Carer's Allowance.¹⁷

More widely, unpaid caring is costly:

- **To the state....**The Treasury is projected to spend £2.8 billion in 2024 on social security payments to individuals who are not working due to unpaid caring, plus another £3.3 billion in taxes and national insurance contributions forgone on this cohort's lost earnings.¹⁸ In 2012, Age UK estimated that the additional output from carers being able to work could be as much as £5.3 billion per year in the UK (approximately £7.3bn in 2024).¹⁹ This is bad news for economic growth – the total loss of output in the UK due to the provision of unpaid care was estimated to be approximately 0.8% of GDP.²⁰
- **...and to employers.** It is estimated that, in Northern Ireland, 1 in 3 people with caring roles have been forced to leave employment because of the demands of caring.²¹ This has significant consequences to employers – the average cost of replacing an employee is £2,000, which means unpaid caring could be costing businesses over one hundred million pounds in costs of re-hiring alone.²² On top of this, carers report that the stress of their caring role makes it difficult to concentrate at work, especially when their job does not afford them flexible working arrangements.²³ This means that businesses that introduce flexible working can reap benefits from increased productivity and better retention. In fact, some businesses that have implemented flexible working policies in the past have reported large savings.²⁴

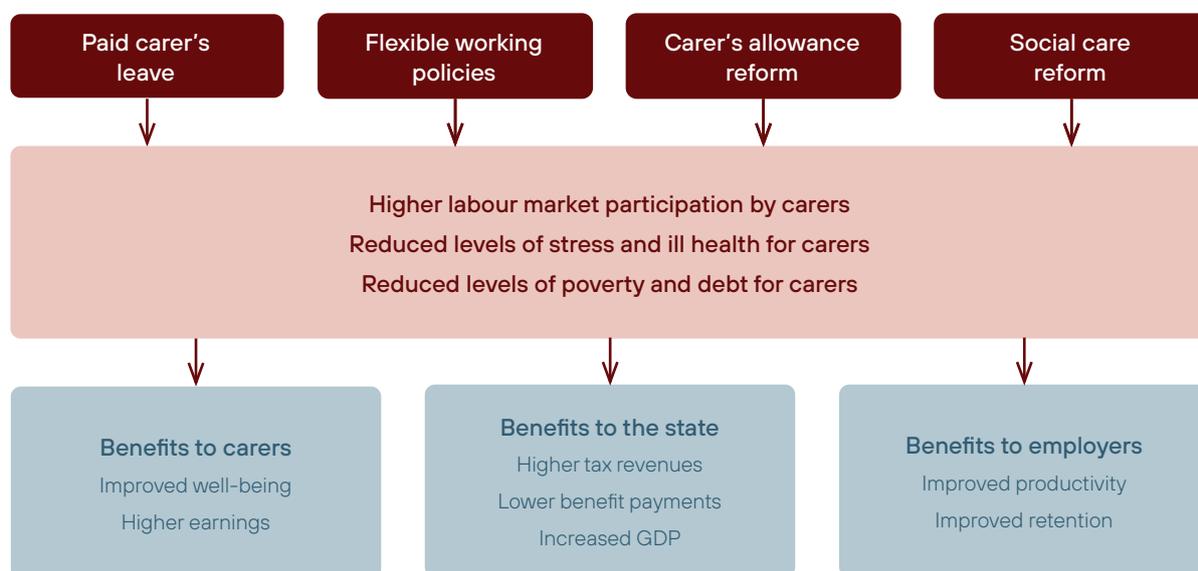
What can we do to support unpaid carers?

A large body of evidence shows there are clear steps that can be taken to improve unpaid carers' well-being – while accelerating economic growth, reducing inequalities, and bringing benefits to businesses at the same time.

Evidence shows that a combination of various policy options is likely to be the most beneficial. This section takes a deep dive into the benefits of:

- Paid carer's leave and flexible working arrangements;
- Reforming Carer's Allowance; and
- Better provision of social care.

The expected benefits of these policies are outlined in the following logic model:



Paid carer's leave & flexible working arrangements

The first area explored is the evidence on the holistic effects of paid carer's leave and other flexible working arrangements.

Unpaid caring responsibilities lead to lower likelihood of employment, which is costly to individuals and society

It is well-evidenced that unpaid caring responsibilities are associated with a lower likelihood of employment. For example, an OECD study found that high-intensity carers were 10% more likely to stop work when their hours of care increased by just 1%.²⁵ International evidence shows that unpaid carers are less likely to be in paid employment, have difficulties returning to employment, are more likely to reduce their hours, and engage in absenteeism.²⁶ Evidence from Australia shows carers have on average a three year shorter working career than non-carers.²⁷

It is estimated that 1 in 3 people with caring roles in Northern Ireland have given up work because of the demands of caring.²⁸ The most recent estimates show the annual public expenditure costs of carers leaving work to be £2.9 billion per year in the UK. This is made up of £1.7 billion in social security benefits paid to unpaid carers who have left employment and an additional £1.2 billion due to taxes not collected on foregone income.²⁹

Unpaid caring responsibilities might also cause carers to reduce their hours of work. A review conducted for the European Commission found that below the 20 hour per week threshold of caring hours, carers were more likely than non-carers to participate in the labour market, but worked fewer hours per week than non-carers.³⁰ Another study of unpaid caring in the US found that providing care can reduce the working hours of middle-aged women by 41%.^{31 32} UK research shows that more than half of carers who quit their job did so because of the stress of juggling care and work.³³

Flexible working arrangements and paid carer's leave can reduce stress, and so are likely to help people juggle work and care effectively. The section below explores how paid carer's leave and flexible working could help carers stay in employment and bring wider benefits to carers and other stakeholders.

Evidence shows the positive effects of paid carer's leave on labour market participation could be significant

Paid carer's leave is often quoted by carers as the single most important way in which they can be supported to remain in work.³⁴ In the UK, 33% of carers who left work or reduced their hours said paid leave would have helped them to remain in employment or not reduce their hours.³⁵

A recent report by Carers NI estimated that providing five days of fully paid carer's leave for employees in Northern Ireland would cost the Executive between £10.3–£15.2 million per year. The report also showed that, even if this reform had minimal impact on employment rates (only preventing 1% of carers from leaving employment), the Executive could still save at least £4.3 million per year in Carer's Allowance payments, while the UK Exchequer could retain £5.9 million each year in income tax and National Insurance contributions.³⁶ The benefits modelled in this research are likely understated, as the modelling conservatively assumes that paid carer's leave prevents only 1% of employees with caring roles from leaving employment, when it could be considerably more.

Evidence shows that the benefits in improved labour market participation might be even greater.³⁷ For example, research by the London School of Economics estimates that unpaid statutory care leave would raise the number of extra-resident working age carers who are in employment by around 7.9% in the UK,³⁸ based on assumptions from a US study that found carers who had access to unpaid family leave were more likely to remain employed than caregivers who did not.³⁹

This perspective is supported by other international evidence. According to a US study, care leave was associated with a 44% increase in the proportion of women in full-time employment in the years after the take-up of carer's leave. Women were also 27% more likely to remain in part-time employment. Paid and unpaid leave had similar effects; however, the take-up of paid leave was significantly larger. While the working environment in the US is very different from the UK, this shows that mandated carer's leave can be very effective at preventing carers from leaving paid work.⁴⁰

Other flexible working policies have been shown to have positive effects on carers' employment and well-being

Beyond paid leave for carers, other types of flexible working – such as flexitime and home working – have been found to be hugely beneficial to carers' ability to remain in work. Flexible work can benefit not just individuals, but also employers.

Flexible working helps carers remain in work and shields them from having to reduce their hours. Over longer time horizons, supporting unpaid carers to stay in work can boost the skills pool in the economy, improve labour market participation, increase people's pensions and boost growth.

The Fourth Work-Life balance survey found that 48% of full-time carers worked flexibly, compared to 39% of non-carers.⁴¹ This suggests carers have a preference for flexible work. Evidence shows flexible working arrangements support carers in not reducing their hours.⁴² Globally, flexible work can reduce turnover by 87%; hybrid work reduces attrition by 33% and improves job satisfaction, causes employees to be more engaged, and can increase productivity by as much as 50%.⁴³



Employers can benefit from better retention and lower sickness absence rates, and an improved pool of skills within the labour force. Impact evaluations carried out by Centrica British Gas attributed £3.1 million financial savings from improving staff retention and reduced absenteeism by supporting employees with a flexible carer policy and peer support.⁴⁴ Evidence from other companies reinforce those findings: for example, looking at BT, a move to flexible working increased staff productivity by 21%. With flexible working policies in place, staff turnover is below 4% when the sector average is 17%, and sickness absence averages below three days per person per annum.⁴⁵

Beyond labour market participation, flexible working and paid carer's leave would mean savings for businesses, the NHS, and a more equal society:

- **Savings to businesses.**

Evidence shows that caring affects paid work. Most working carers experience difficulties concentrating at work due to their caring role; 30% reduced their hours of paid work due to unpaid care; 36% refused a job offer or promotion. 46% reported taking their annual leave to care over the last year, and 15% had taken sick leave to provide care. Paid leave is the most desired form of support, and working carers who believe their employer is carer-friendly are:

- less likely to consider reducing their hours or leaving their job;
- find it easier to concentrate at work; and
- are less likely to take sick leave or unpaid leave to provide care.⁴⁶

33% of carers who left work or reduced their hours said paid leave would have helped them to remain in employment.⁴⁷ This is reinforced by empirical findings from businesses: Centrica found that carer-friendly work policies are saving them £1.8 million a year in avoiding unplanned absences and presenteeism, and an additional £1.3 million in increased retention.⁴⁸ Employers would also benefit from retaining worker's skills, which would improve the talent pool in the economy.

- **Improved health.**

An OECD report found the prevalence of mental health problems among carers to be 20% higher than among non-carers.⁴⁹ Meta-studies and reviews show that carers have worse physical health than non-carers.⁵⁰ This might be, at least in part, due to lack of time to rest and decompress. Carers, especially working carers, are chronically short on time, and compromise their own leisure time in order to provide care. Research shows that, currently, 46% of carers had to use annual leave to provide care to dependents.⁵¹ The negative effects of caring on mental health may be stronger for women than men.⁵² At the same time, flexible working interventions were found to have a stronger effect on women's mental health.⁵³ Work-life balance of carers is better in countries with more flexible working arrangements.⁵⁴ If helping carers to stay in work can improve their mental health, this may bring large benefits to state expenditure – mental ill health is costing Northern Ireland an estimated £3.4 billion.⁵⁵

- **Reduced inequalities.**

Women are more likely to be unpaid carers, and also more likely to care for longer hours.⁵⁶ Women are also disproportionately affected by caring, are less likely to ask for help, and more likely to leave employment in order to care. Because of this, any intervention that aims to help carers remain in employment is likely to address underlying inequalities in labour market participation. Additionally, those from lower socio-economic backgrounds are more likely to provide long hours of care.⁵⁷ This means that any intervention is likely to predominantly help the poorest in society. Women can be trapped in lower paying jobs, as this enables them to combine paid work with unpaid caregiving.⁵⁸

The benefit of improved labour market participation is not static, but has implications for carers' financial situation in the future, as current earnings have implications for pensions and savings.⁵⁹ This means that benefits of paid carer's leave and other flexible working policies will snowball into the future and likely keep increasing year-on-year, as carers have a stronger safety net of savings that they can fall back on.

Reforming Carer's Allowance

Currently, high-intensity unpaid carers who provide unpaid care for more than 35 hours a week and earn less than £151 per week are entitled to Carer's Allowance, worth £81.90 per week.

Currently, Carer's Allowance is not enough to safeguard against poverty and acts as a disincentive to employment

The level of support that Carer's Allowance provides is not high enough, particularly long-term. Previous analysis by WPI Economics for Carers NI found that 46% of carers who receive Carer's Allowance in Northern Ireland live in poverty.⁶⁰ Around half of Carer's Allowance claimants in the UK spent more than 65 hours a week caring, and 70% of claimants have been caring for at least five years. Only 16% of claimants are in paid work – and 70% of those who are out of work say they are out of work due to their caring responsibilities.⁶¹

The benefit has recently come under scrutiny for its unclear purpose, stringent eligibility criteria,⁶² and the possibility of overpayments that can leave unpaid carers in debt to the Department for Work and Pensions.⁶³

A closer look at Carer's Allowance reveals flaws in its design, which discourage carers from participating in the labour market and traps them in poverty:

- In order to claim Carer's Allowance, unpaid carers cannot be in education for more than 21 hours a week.⁶⁴ This requirement is counter-productive, as it discourages carers from education. For those carers who are out of work, lack of access to education may make it more difficult to rejoin the labour market.
- Carer's Allowance earnings limit of £151 per week has historically not kept pace with National Living Wage increases, and is a cliff edge – which means that earning even a pound over this limit automatically removes your entire Carer's Allowance entitlement.⁶⁵ This creates perverse incentives for unpaid carers in receipt of Carer's Allowance, who find themselves in a situation where working more hours and earning more money from employment can result in lower earnings overall.⁶⁶ Some carers may forego opportunities to increase their hours or earnings, or turn down overtime opportunities, in order to stay within the earnings limit.⁶⁷

In economic terms, it means that, at a given level of earnings, the marginal utility of income for carers in receipt of Carer's Allowance is negative.⁶⁸ This creates a significant barrier to unpaid carers who want to enter employment or increase their working hours. As Carer's Allowance is claimed predominantly by women, flaws in its design will inevitably deepen the existing gender inequalities.⁶⁹

Evidence also suggests that the current system simultaneously acts as a disincentive to work and fails to protect against poverty, as the level of income replacement is too low.⁷⁰ Carer's Allowance needs to be re-designed in such a way that the benefit offers enough support to safeguard carers against poverty while, at the same time, minimising the negative effects on labour market participation as much as possible.

How can Carer's Allowance be re-designed?

Taking all the evidence together, the formula for a Carer's Allowance re-design has to take into account international evidence on what works, and what doesn't, as well as wider economic considerations:

- **The level of Carer's Allowance has to be enough to safeguard carers against poverty.** While encouraging work is an important step towards helping unpaid carers, going back into employment will not be possible for everyone – particularly very high intensity carers. It is important to design a system that, while encouraging work as much as possible, shelters the most vulnerable from financial hardship.⁷¹
- **As we set the new level of social security support for unpaid carers, we need to take into account how this will affect employment.** As benefits increase, the marginal utility of income drops, as the real gain to individuals from each additional pound earned through work is lower – assuming that benefits will taper away as income rises. International evidence shows that increases in cash benefits can decrease working hours, and that this effect may be particularly strong for high-intensity female carers. In Germany, a 1% increase in cash benefits decreased working hours of high-intensity female carers by 0.71%, and decreased labour force participation by 0.25%.⁷² In the US, a generous Carer's Allowance style payment of between \$18,000–\$36,000 per year increased economic inactivity in women from 59.5% to 62.2%.
- **On the flipside, increasing the level of support for unpaid carers might encourage more people into unpaid care – which might reduce the pressure on social care services.** Literature finds that generous cash-for-care benefits have potential to increase people's likelihood of providing care. In the US, a relatively generous Carer's Allowance-style payment (between \$18,000–\$36,000 per year) was found to increase women's likelihood of providing care by 7.4–13.6pp.⁷³ Other studies suggest that the more the state pays in Carer's Allowance-style payments, the higher the likelihood of providing care, with the effect greater for women and those on lower incomes. However, such effects do not appear with lower benefit payments, aside for those with the lowest pay.⁷⁴
- **Carer's Allowance eligibility rules cannot create an additional disincentive to employment.** While employment disincentives are inevitable when considering benefit increases, thoughtful design can go a long way in minimising them. Currently, this is not the case. A reform of Carer's Allowance must consider an introduction of an earnings taper, such that the marginal utility of income stays positive all along the distribution; and the education rule has to be abolished, to stop disincentivising carers from getting new qualifications.
- **If the goal is to encourage carers back into employment, it is critical to ensure that the right work opportunities are available.** Evidence shows that, in order to ensure that work incentives lead to an increase in labour market participation amongst unpaid carers, it is vital to ensure that the right opportunities are available to them – particularly, that part-time and flexible working opportunities are available.⁷⁵ This reinforces the importance of a holistic approach to designing policy options aimed to help unpaid carers, and thinking about social security reforms in the context of wider transformation.



Better provision of social care

A wealth of qualitative evidence shows that lack of formal care services is detrimental to the carer's ability to remain in work. At the same time, the single most effective intervention for those caring for 10 hours a week or more is increased provision of home care or day care.

Evidence shows better provision of social care is essential

A £500 million investment in care provision has been modelled to increase the number of working-age carers in employment by 2.4%, or 58,000, in the United Kingdom.⁷⁶ The benefits of such reform would be vast and far reaching, and benefits would stretch far beyond the initial effect on employment, as carers would enjoy higher well-being, lower stress, fewer mental health issues and increased productivity.

Research finds a positive association between the receipt of paid social care services and employment in unpaid carers in England. Women who provide unpaid care for more than 10 hours a week have significantly higher odds of being in employment if a person they care for receives at least one paid service, with home care being the most effective.⁷⁷

Internationally, countries with better provision of paid home care tend to have higher levels of employment amongst groups most likely to become unpaid carers – women, and those on lower incomes.⁷⁸ It has been estimated that, if EU countries with below-average spending on formal services for older people increased their spending to EU average, labour force participation amongst women aged 45–59 would rise by 9 to 13pp, with a potential for such a policy to be cost-effective.⁷⁹ Better provision of social care also has potential to increase working hours in OECD countries.⁸⁰ Short breaks and respite were also found to be effective in supporting carers to remain in work.⁸¹

The International Trade Union Confederation has estimated that, if 2% of GDP was invested in the care industry, more jobs would be created, and the overall employment rate could be raised by between 2.4 and 6.1%.⁸²

Providing social and respite care can lessen the physical and emotional strain of caregiving, which can benefit carers' health and well-being. More social care can help carers to keep or increase their participation in the labour market, which can improve their income, skills, and career prospects. Social care can also improve the relationship between carers and care recipients by lowering stress, resentments, and loneliness, and increasing happiness and mutual support.⁸³

More care spending will also help tackle worsening labour shortages by boosting employment opportunities for carers and disabled people. Raising taxes to spend on adult social care will redistribute money from high-income to low- and middle-income households, and from men to women.⁸⁴

Conclusion

International and UK evidence overwhelmingly shows that policies designed to help unpaid carers can bring many benefits to individuals, businesses and governments.

Flexible working policies, including paid carer's leave, social security reform and improved provision of paid care services have all been shown to have a significant impact on unpaid carer's well-being, health, and ability to work. Furthermore, evidence suggests that these different policies can be self-reinforcing, and a holistic approach to tackling carer poverty might bring the largest benefits, leading to a happier, healthier and more productive society.

In the next report in the series, planned for Autumn 2024, this evidence review will form the basis of a quantitative model which will attempt to put a number on the benefits of the above policies, were they to be implemented in Northern Ireland.

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