

APRIL 30, 2020

COVID-19 IMPACT & NEEDS ASSESSMENT SURVEY FINDINGS

PRESENTED BY TRAILBLAZER RESEARCH



EXECUTIVE SUMMARY

QUANTIFYING NEED DURING A PANDEMIC

In April 2020, Meals on Wheels America partnered with Trailblazer Research to quantify and describe the COVID-19 pandemic's impact on Member operations and their communities. With a week-long online survey fielded from April 22-28, 2020, data volunteered by 361 Members made clear that senior nutrition programs across budgets and geographies are being hit in a big way.

Overall, Members are getting **74%** more new requests for meal services per week. They are doing their very best to keep up, overall serving **56%** more meals to **22%** more seniors per week than they were on March 1. Even so, waitlists have grown **26%**, with more than **15,000** seniors waiting to receive meals nationwide.

Members shared that their biggest challenge is having enough safety supplies and equipment. And understanding how best to use all the newly available federal funding is currently as urgent as food, especially among key regions.

DETAILED FINDINGS

KEY FINDINGS

WHETHER IT'S INCREASED DEMAND OR INCREASED COSTS, NEARLY ALL MEMBERS FEEL IMPACTED BY COVID-19

97% OF MEMBERS SAY EITHER DEMAND OR COSTS HAVE INCREASED BECAUSE OF COVID-19

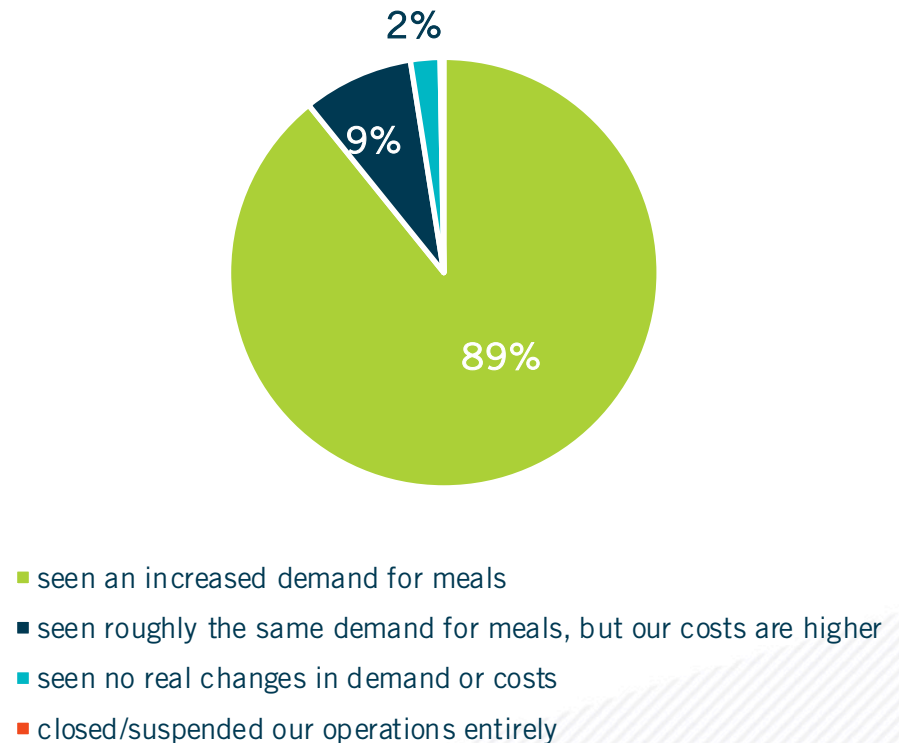
Only 1 participating program (0%) said they've closed/suspended operations entirely

SMALLER PROGRAMS MORE OFTEN SAY DEMAND IS THE SAME, COSTS ARE HIGHER

Small programs significantly more often say demand is the same, but costs are higher (11% vs 5%) compared to Large programs.

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Q1. Current Situation by Total



KEY FINDINGS

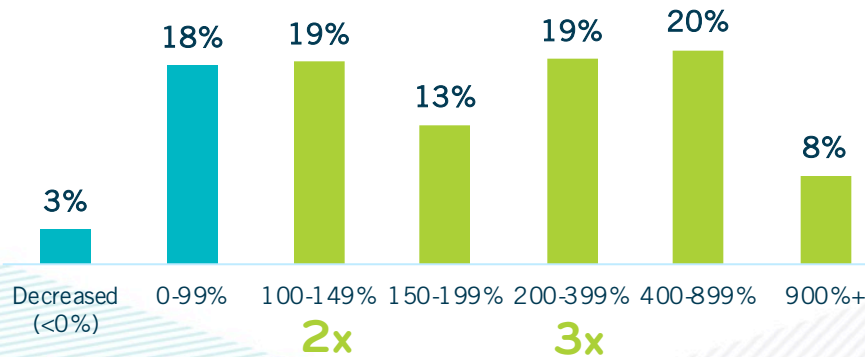
OVERALL, MEMBERS REPORT THAT NEW REQUESTS FOR MEALS (DEMAND) IS UP 74%

79% OF MEMBERS SAY THE # OF NEW REQUESTS THEIR PROGRAM RECEIVES/WEEK HAS AT LEAST DOUBLED

Nearly half (47%) say demand has at least *tripled* (200% growth or more).

n=	343
Pre-COVID Requests for meals/wk - March 1	21,908
Requests for meals/wk now	38,203
% Change	74%

Q3-4. New Requests for Meals Per Week
% Growth Tiers by Total



KEY FINDINGS

HIGHEST GROWTH IN NEW REQUESTS FOR MEALS AMONG WEST COAST, XL, & URBAN PROGRAMS

17% OF WEST COAST PROGRAMS SEEING 900%+ MORE NEW REQUESTS FOR MEALS PER WEEK

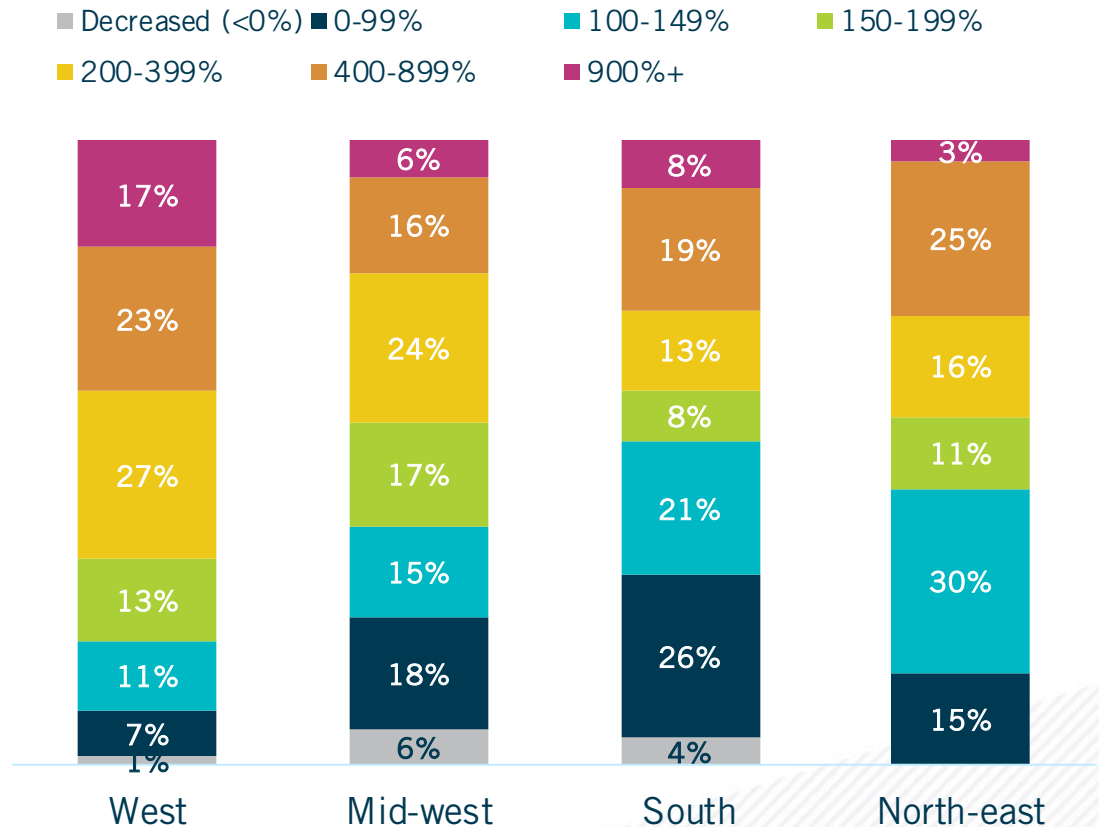
Additionally, programs with SNP budgets of \$3MM+ and programs in urban and suburban areas have significantly higher growth averages than other comparison groups.

This finding may be skewed by feedback from California's biggest urban cities— San Diego, Ventura, San Francisco, Los Angeles— are all experiencing unprecedented demand.

See appendix for additional charts.

n=343

Q3-4. Demand Growth by Region



KEY FINDINGS

MEMBERS ARE DOING THEIR BEST TO KEEP UP,
SERVING 56% MORE MEALS TO 22% MORE
SENIORS

**~1/3 OF MEMBERSHIP IS
COLLECTIVELY SERVING
1.3MM+ MEALS TO
NEARLY 300,000
SENIORS PER WEEK**

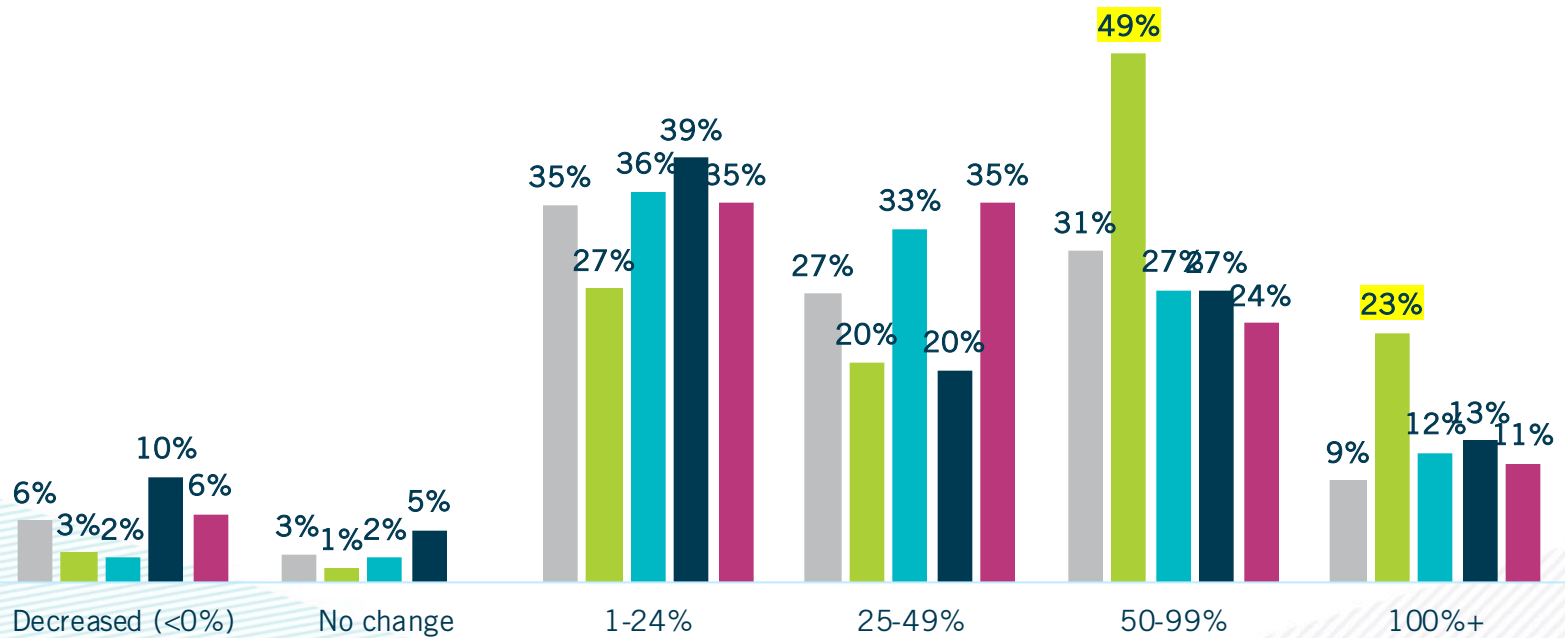
n=	354
Pre-COVID Meals served/week - March 1	861,243
Meals served/week now	1,346,940
% Change	56%
n=	346
Pre-COVID Seniors served/week - March 1	238,773
Seniors served/week now	291,472
% Change	22%

KEY FINDINGS

IN PARTICULAR, WESTERN MEMBERS HAVE RAMPED UP THEIR MEALS SERVED/WEEK IN A BIG WAY, OUTPACING OTHER REGIONS

% Growth in Meals Served by Region

■ Total ■ West ■ Mid-west ■ South ■ North-east



n=354

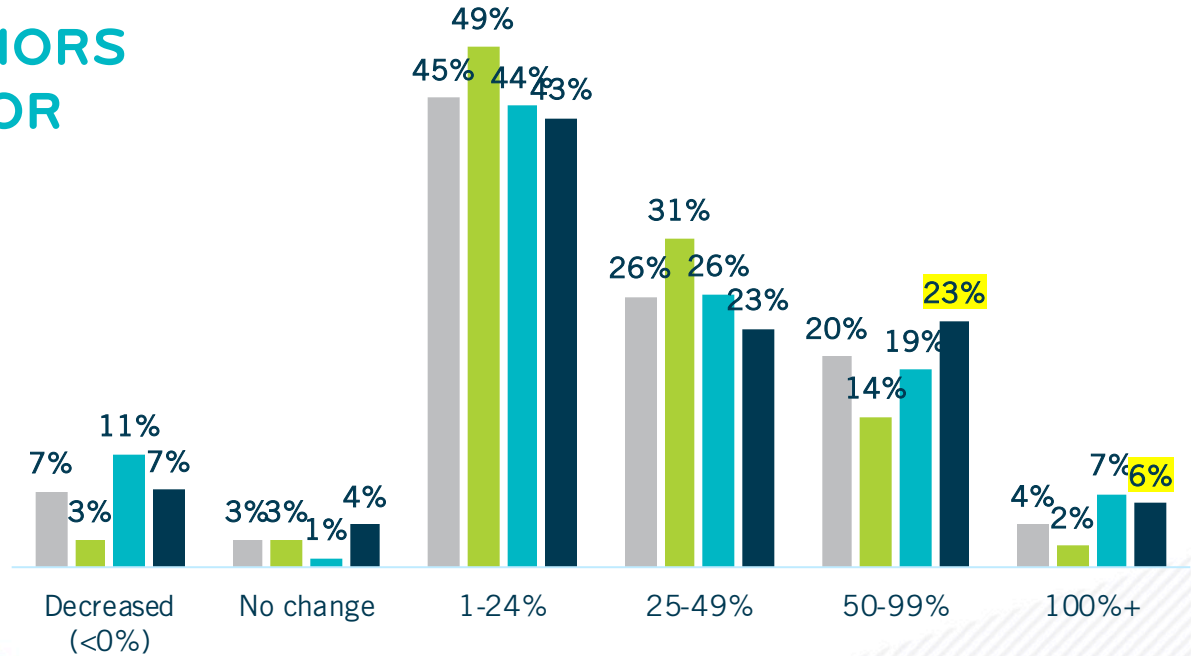
KEY FINDINGS

...AND RURAL PROGRAMS OUTPACE URBAN ONES FOR GROWTH IN NUMBER OF SENIORS SERVED/WEEK

29% OF RURAL PROGRAMS HAVE INCREASED THE NUMBER OF SENIORS SERVED BY 50% OR MORE

Seniors Served per Week Growth Tiers by Rurality

■ Total ■ Urban ■ Suburban ■ Rural



n=354

KEY FINDINGS

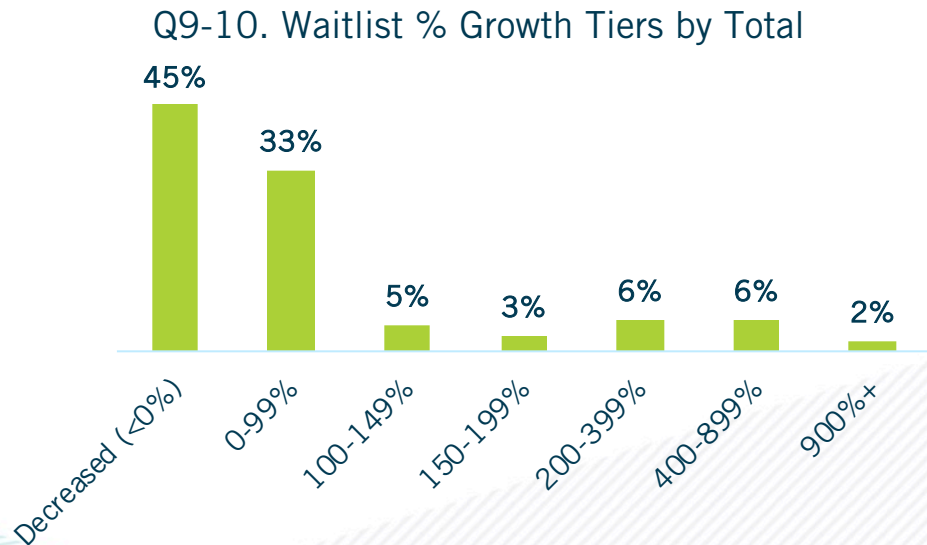
ALTHOUGH 45% OF MEMBERS REPORT A WAITLIST DECREASE, WAITLISTS NATIONWIDE ARE UP 26%

55% OF MEMBERS' WAITLISTS HAVE INCREASED SINCE MARCH 1

22% of this group report that their waitlist has at least doubled.

n=	102
Pre-COVID Waitlist size - March 1	11,823
Waitlist size now	14,924
% Change	26%
Seniors turned away by programs w/o waitlist	430

THERE ARE MORE THAN 15,000 UNSERVED SENIORS NEEDING MEALS RIGHT NOW

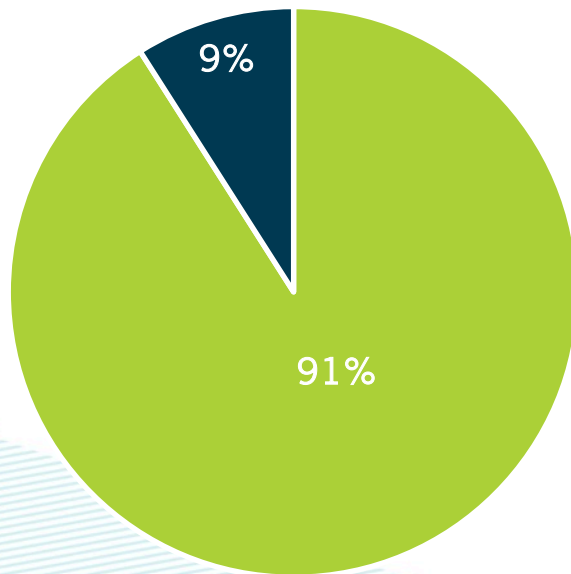


KEY FINDINGS

91% SAY ADDITIONAL SENIORS SHELTERING-IN-PLACE CONTRIBUTES TO THIS RISE IN DEMAND

Q2b. “We have seen increased demand from seniors sheltering-in-place (who did not previously receive services)”

■ Yes ■ No



n=361

“We have just added a temporary 6-week drive through program this week that will add 10,000 meals per week @ 5 meals per week per senior for 2,000 seniors who are NOT part of our regular HDM program.”

- Lexington County Recreation & Aging Commission, SC

“We have been receiving calls for Meals on Wheels for those who are under 60 and disabled needing meals.”

- JSSA Meals on Wheels, MD

“We added capacity to be able to serve our entire waitlist. The initial demand was incredibly high for us, though it has now stabilized and we are serving almost 20% more clients daily.

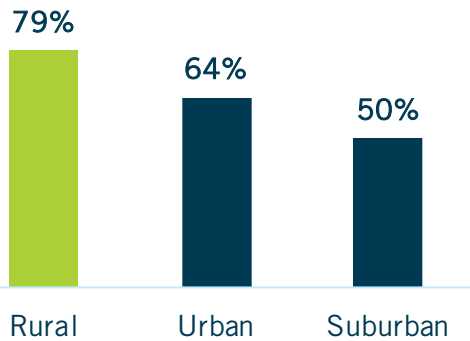
- Bloomington Meals on Wheels, IN

KEY FINDINGS

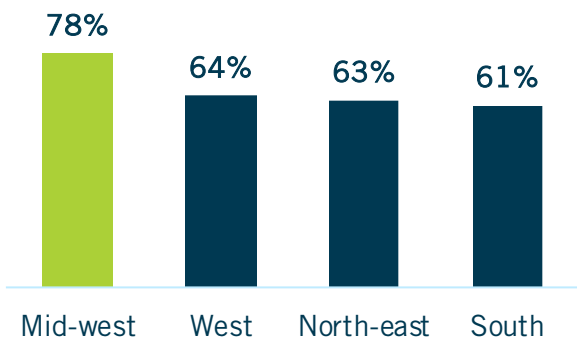
RURAL, MID-WEST, & LARGER PROGRAMS MOST OFTEN ATTRIBUTE SOME GROWTH TO THEIR CONGREGATE CLOSURES

Q2a. "Seen increased demand because our congregate site(s) has/have closed"

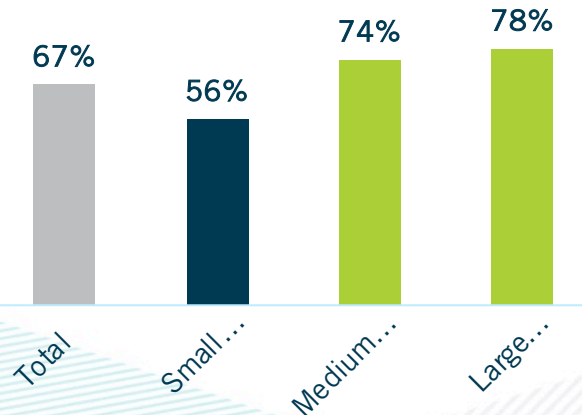
...by Rurality



...by Region



...by SNP Budget



n=361

KEY FINDINGS

MEMBERS' BIGGEST CHALLENGE OVERALL: SAFETY SUPPLIES & EQUIPMENT

63% OF MEMBERS FEEL SAFETY SUPPLIES ARE A MODERATE OR MORE SERIOUS PROBLEM

Nearly double the severity of the next most pressing challenge: understanding available federal funding (35%).

TOP BOXES

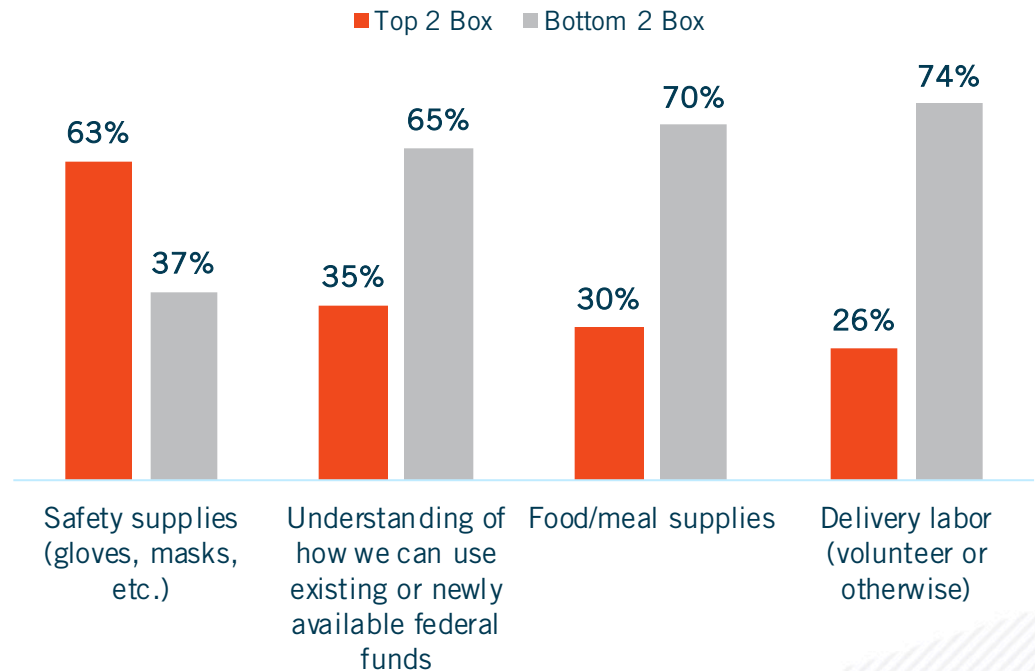
- Serious problem
- Moderate problem

BOTTOM BOXES

- Minor problem
- Not a problem

n=358

Q12. Problem Perception by Total
Top2/Bottom2 Box Summary



KEY FINDINGS

SMALLER PROGRAMS SIGNIFICANTLY MORE OFTEN FEEL THE NEED FOR FUNDING GUIDANCE

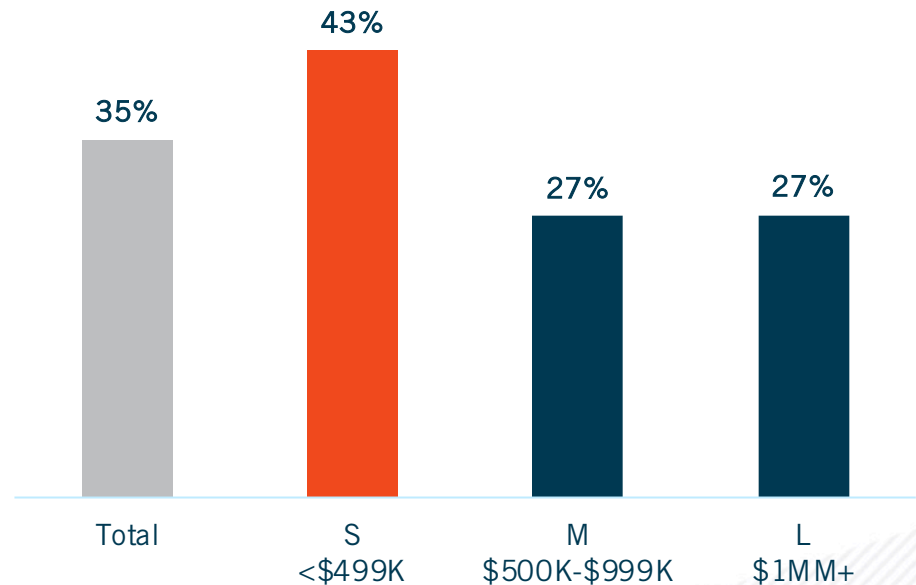
43% OF SMALL PROGRAMS

(SNP Budgets <\$500K) perceive their understanding of federal funding available as a moderate or more serious problem— significantly more often than do larger programs (27%).

LARGER PROGRAMS MORE OFTEN FEEL MORE SAVVY

73% of Members with medium and large SNP budgets significantly more often called understanding available funding as minor or not a problem at all.

Q12d. Top 2 Box Summary by SNP Budget
“Understanding of how we can use existing or newly available federal funds”



n=361

KEY FINDINGS

REGIONAL DIFFERENCES PRESENT UNIQUE OUTREACH OPPORTUNITIES

46% OF SOUTHERN PROGRAMS SAY UNDERSTANDING FUNDING AVAILABLE IS A PROBLEM

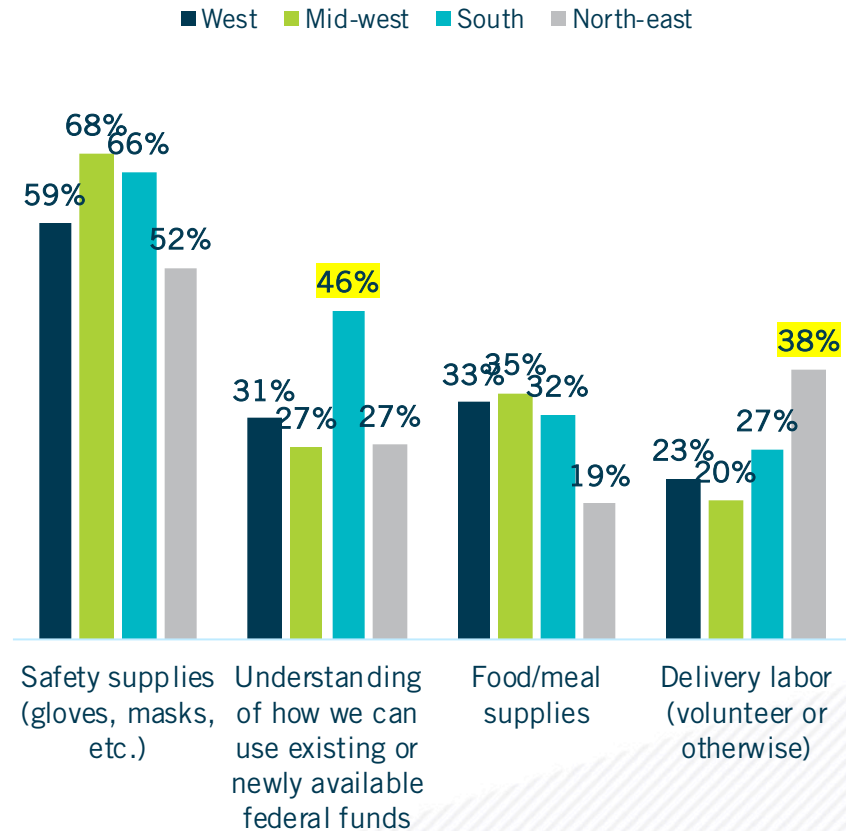
This proportion--nearly half—is significantly greater than any other region.

NORTH EAST HAS GREATEST NEED FOR DELIVERY LABOR

38% of participating programs from the NE say delivery labor is a T2B problem, significantly more often than programs in the west or mid-west.

n=358

Top 2 Box Perceived Problems by Region



TAKEAWAYS

Member programs are working harder than ever to meet the spike in demand, but there is still a chasm between meals served and meals needed.

We're seeing the severity of need and perceived challenges vary across regions, program size, and rurality. Among Members in the west, particularly in suburban areas throughout California, new requests for meals are outpacing even the largest programs' ability to serve them. Programs in the Northeast that are closer to the pandemic's US epicenter, feel comparatively more well-equipped when it comes to safety gear, but they need help with delivery labor more than any other region. Small programs, and Members in the south need targeted guidance around how best to use newly available federal funding. Across the board, safety supplies are in dire need.

As regional coordination of efforts becomes more normal than nationwide directives, it's likely we'll see the COVID-19 pandemic "peak" asynchronously across the US. In similar kind, it's possible we may see scenarios currently experienced in one region come to pass later in others.

The perception among Members is that until treatment and testing becomes widely available, seniors and other vulnerable populations may continue sheltering in place far longer than the rest of the country. Members have responded with incredible resolve and resilience, but they're going to need help to meet the ongoing needs of their scared, sheltered senior communities.

APPENDIX

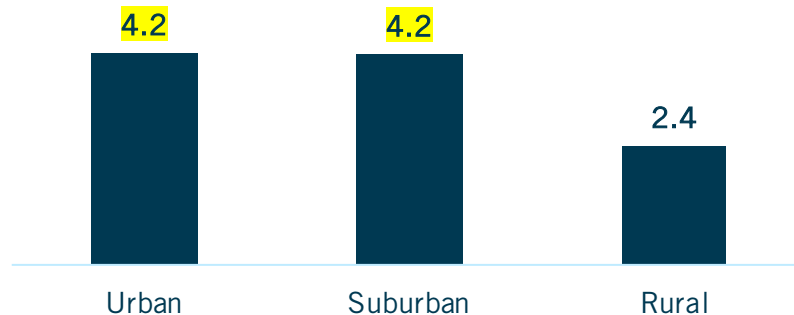
DEMAND GROWTH

HIGHEST AVERAGE GROWTH IN DEMAND AMONG WEST COAST, XL, & URBAN/SUBURBAN PROGRAMS

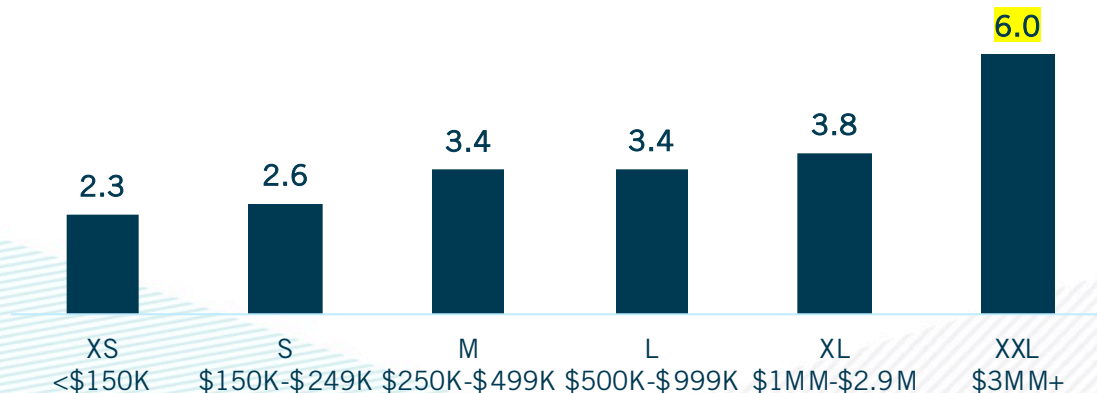
Mean Demand Growth by Region



Mean Demand Growth by Rurality



Mean Demand Growth by SNP Budget



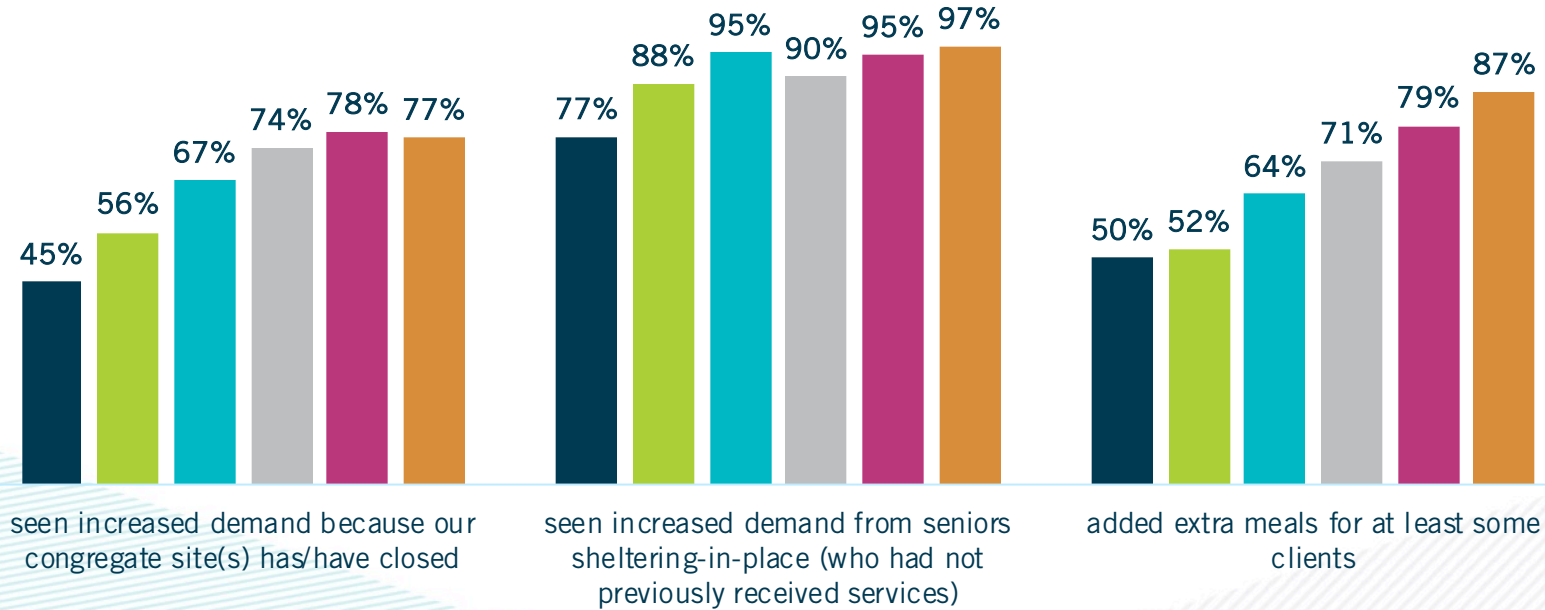
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DEMAND DRIVERS

IN GENERAL, LARGE PROGRAMS SEEM TO BE ESPECIALLY IMPACTED & PRO-ACTIVE

Demand Drivers by Program Size

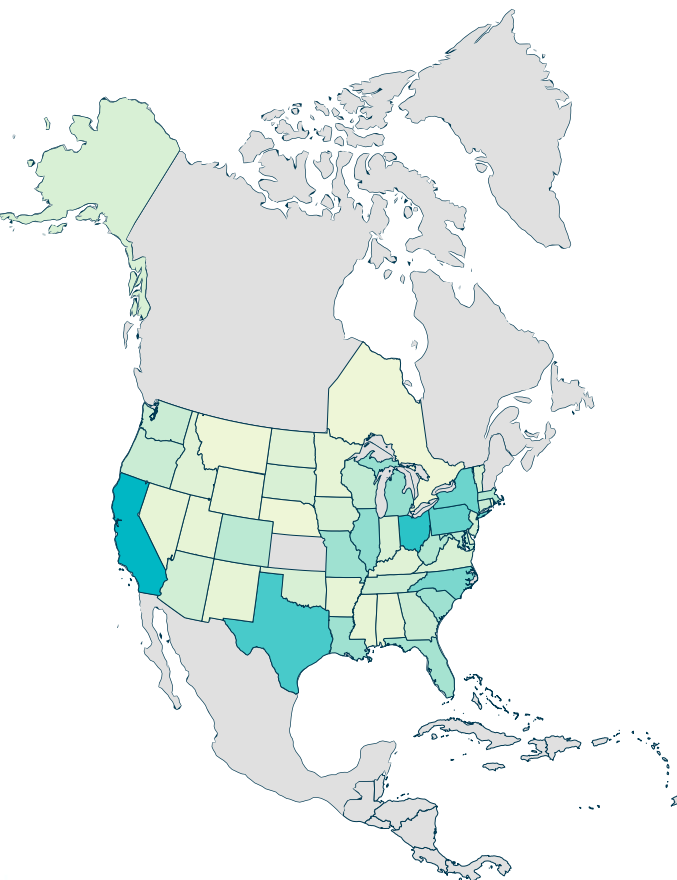
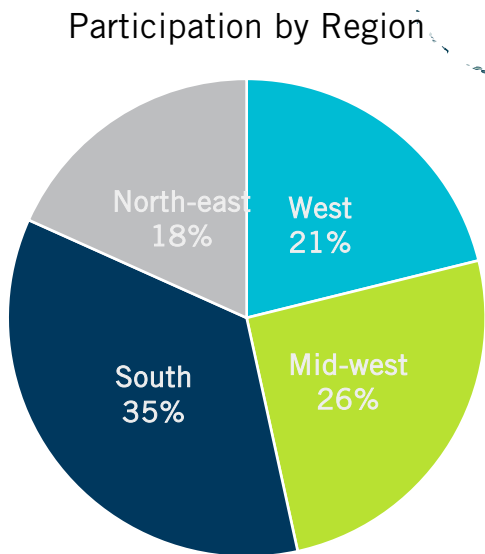
■ XS <\$150K ■ S \$150K-\$249K ■ M \$250K-\$499K ■ L \$500K-\$999K ■ XL \$1MM-\$2.9M ■ XXL \$3MM+



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PARTICIPATION REPRESENTATION FROM ALL 4 REGIONS, 47/50 STATES + ONTARIO

Participation by State/Province



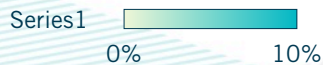
TOP RESPONDERS

W	California	10%
MW	Ohio	8%
S	Texas	7%
NE	Pennsylvania	6%
NE	New York	5%
S	North Carolina	5%

NO DATA FROM

Maine
New Hampshire
Kansas
Hawaii

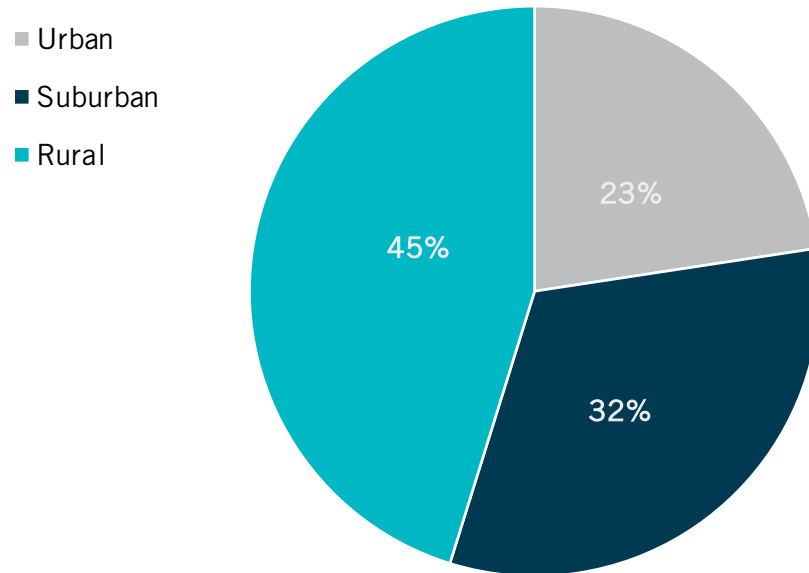
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PARTICIPATION
PARTICIPATION SKEWED SLIGHTLY RURAL

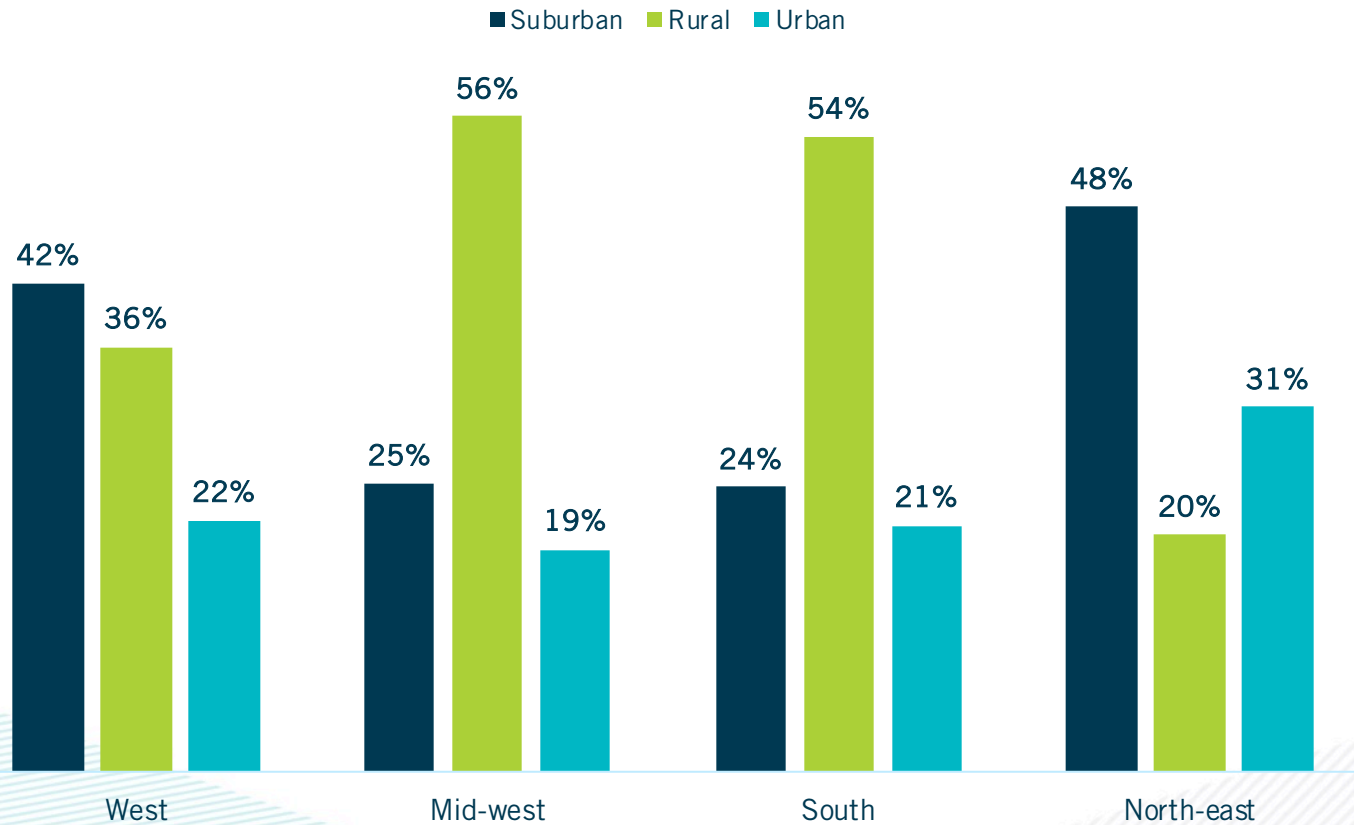
Participation by Rurality



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PARTICIPATION
PARTICIPANTS IN THE WEST AND NORTHEAST
SIGNIFICANTLY MORE SUBURBAN; MIDWEST & SOUTH
SIGNIFICANTLY MORE RURAL

Regional Participants by Rurality

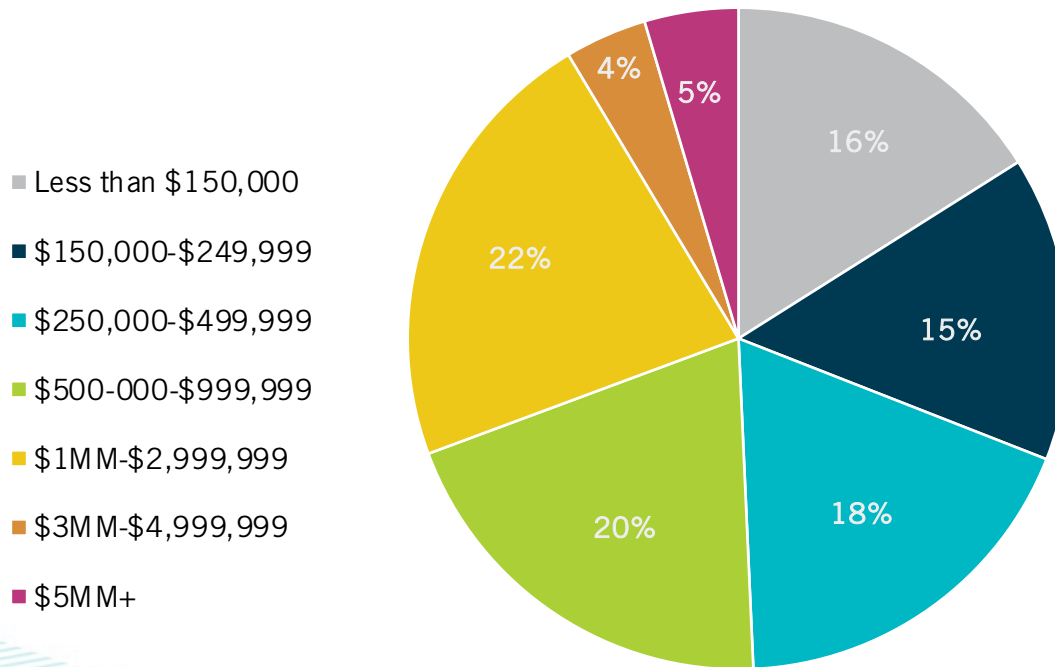


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PARTICIPATION

REMARKABLY BALANCED PARTICIPATION BY SNP BUDGET TIERS

Participation by SNP Budget



NOTE:

Programs with budgets of \$3MM+ were grouped for analysis purposes as “XXL”

n=349