COVID-19 IMPACT & NEEDS ASSESSMENT SURVEY FINDINGS

PRESENTED BY TRAILBLAZER RESEARCH
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
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.

Q1. Current Situation by Total
- 89% seen an increased demand for meals
- 9% seen roughly the same demand for meals, but our costs are higher
- 2% seen no real changes in demand or costs
- 2% closed/suspended our operations entirely

n=361
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— all experiencing unprecedented demand.

See appendix for additional charts.

n=343

Q3-4. Demand Growth by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Decreased (&lt;0%)</th>
<th>0-99%</th>
<th>100-149%</th>
<th>200-399%</th>
<th>400-899%</th>
<th>900%+</th>
</tr>
</thead>
<tbody>
<tr>
<td>West</td>
<td>17%</td>
<td>6%</td>
<td>8%</td>
<td>11%</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Mid-west</td>
<td>16%</td>
<td>24%</td>
<td>13%</td>
<td>15%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>South</td>
<td>19%</td>
<td>13%</td>
<td>8%</td>
<td>15%</td>
<td>18%</td>
<td>30%</td>
</tr>
<tr>
<td>North-east</td>
<td>25%</td>
<td>16%</td>
<td>11%</td>
<td>30%</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th></th>
<th>n=</th>
<th>Pre-COVID</th>
<th>Meals served/week now</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-COVID Meals served/week - March 1</td>
<td>354</td>
<td>861,243</td>
<td>1,346,940</td>
<td>56%</td>
</tr>
<tr>
<td>Seniors served/week now</td>
<td>346</td>
<td>238,773</td>
<td>291,472</td>
<td>22%</td>
</tr>
</tbody>
</table>

n= number of members

Meals served/week now = 1,346,940
\% Change = \frac{1,346,940 - 861,243}{861,243} \times 100 \approx 56\% 

Seniors served/week now = 291,472
\% Change = \frac{291,472 - 238,773}{238,773} \times 100 \approx 22\%

Source: Meals on Wheels America
KEY FINDINGS

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

% Growth in Meals Served by Region

<table>
<thead>
<tr>
<th>Decreased (&lt;0%)</th>
<th>No change</th>
<th>1-24%</th>
<th>25-49%</th>
<th>50-99%</th>
<th>100%+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>West</td>
<td>Mid-west</td>
<td>South</td>
<td>North-east</td>
<td></td>
</tr>
<tr>
<td>6%</td>
<td>3%</td>
<td>2%</td>
<td>6%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>10%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>35%</td>
<td>36%</td>
<td>39%</td>
<td>35%</td>
<td>31%</td>
<td>49%</td>
</tr>
<tr>
<td>27%</td>
<td>27%</td>
<td>20%</td>
<td>20%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>27%</td>
<td>20%</td>
<td>20%</td>
<td>35%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>3%</td>
<td>9%</td>
<td>12%</td>
<td>3%</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

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

- Decreased (<0%)
- No change
- 1-24%
- 25-49%
- 50-99%
- 100%+

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.

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

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

Q9-10. Waitlist % Growth Tiers by Total

- Decreased (<0%): 45%
- 0-99%: 33%
- 100-149%: 5%
- 150-199%: 3%
- 200-399%: 6%
- 400-899%: 6%
- 900%+: 2%
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

91%

9%

“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

<table>
<thead>
<tr>
<th>Rurality</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural</td>
<td>79%</td>
</tr>
<tr>
<td>Urban</td>
<td>64%</td>
</tr>
<tr>
<td>Suburban</td>
<td>50%</td>
</tr>
</tbody>
</table>

...by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-west</td>
<td>78%</td>
</tr>
<tr>
<td>West</td>
<td>64%</td>
</tr>
<tr>
<td>North-east</td>
<td>63%</td>
</tr>
<tr>
<td>South</td>
<td>61%</td>
</tr>
</tbody>
</table>

...by SNP Budget

<table>
<thead>
<tr>
<th>SNP Budget</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>67%</td>
</tr>
<tr>
<td>Small</td>
<td>56%</td>
</tr>
<tr>
<td>Medium</td>
<td>74%</td>
</tr>
<tr>
<td>Large</td>
<td>78%</td>
</tr>
</tbody>
</table>

n=361
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

<table>
<thead>
<tr>
<th></th>
<th>Top 2 Box</th>
<th>Bottom 2 Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety supplies</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>(gloves, masks, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understanding of how we can use existing or newly available federal funds</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>Food/meal supplies</td>
<td>70%</td>
<td>30%</td>
</tr>
<tr>
<td>Delivery labor (volunteer or otherwise)</td>
<td>74%</td>
<td>26%</td>
</tr>
</tbody>
</table>

n=358
**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”

- **Total**: 35% (43% for S <$499K)
- **M $500K-$999K**: 27%
- **L $1MM+**: 27%

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.

Top 2 Box Perceived Problems by Region

- **Safety supplies (gloves, masks, etc.)**
  - West: 59%
  - Midwest: 52%
  - South: 68%
  - North-east: 66%

- **Understanding of how we can use existing or newly available federal funds**
  - West: 31%
  - Midwest: 27%
  - South: 46%

- **Food/meal supplies**
  - West: 33%
  - Midwest: 32%
  - South: 35%

- **Delivery labor (volunteer or otherwise)**
  - West: 23%
  - Midwest: 20%
  - South: 27%
  - North-east: 38%

n=358
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 pandemics’ 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.
DEMAND GROWTH

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

Mean Demand Growth by Region

- West: 6.6
- Mid-west: 2.4
- South: 2.6
- North-east: 2.8

Mean Demand Growth by Rurality

- Urban: 4.2
- Suburban: 4.2
- Rural: 2.4

Mean Demand Growth by SNP Budget

- XS (<$150K): 2.3
- S ($150K-$249K): 2.6
- M ($250K-$499K): 3.4
- L ($500K-$999K): 3.4
- XL ($1MM-$2.9M): 3.8
- XXL ($3MM+): 6.0

n=343
**Demand Drivers**

**In General, Large Programs Seem to Be Especially Impacted & Pro-Active**

Demand Drivers by Program Size

<table>
<thead>
<tr>
<th>XS</th>
<th>S</th>
<th>M</th>
<th>L</th>
<th>XL</th>
<th>XXL</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$150K</td>
<td>$150K-$249K</td>
<td>$250K-$499K</td>
<td>$500K-$999K</td>
<td>$1MM-$2.9M</td>
<td>$3MM+</td>
</tr>
</tbody>
</table>

- 45% seen increased demand because our congregate site(s) has/have closed
- 67% seen increased demand from seniors sheltering-in-place (who had not previously received services)
- 74% added extra meals for at least some clients

n=361
Participation by State/Province

Participation by Region

- West: 21%
- Mid-west: 26%
- South: 35%
- North-east: 18%

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

n=357
PARTICIPATION

PARTICIPATION SKewed SLIGHTLY RURAL

Participation by Rurality

- Urban: 32%
- Suburban: 23%
- Rural: 45%

n=354
PARTICIPANTS IN THE WEST AND NORTHEAST SIGNIFICANTLY MORE SUBURBAN; MIDWEST & SOUTH SIGNIFICANTLY MORE RURAL

Regional Participants by Rurality

- **West**: 42% Suburban, 22% Rural, 36% Urban
- **Mid-west**: 56% Suburban, 19% Rural, 25% Urban
- **South**: 54% Suburban, 21% Rural, 24% Urban
- **North-east**: 48% Suburban, 20% Rural, 31% Urban

n=354
**Remarkably Balanced Participation by SNP Budget Tiers**

Participation by SNP Budget

- Less than $150,000: 4%
- $150,000-$249,999: 5%
- $250,000-$499,999: 18%
- $500,000-$999,999: 20%
- $1MM-$2,999,999: 15%
- $3MM-$4,999,999: 16%
- $5MM+: 22%

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