



Meals on Wheels Survey 2018



Research conducted by



Introduction

Key Findings

- Councils providing a meals on wheels service has decreased to 42% in 2018. A drop of 24% since 2014 when 66% of councils provided a meals on wheels service.
- The number of council's subsidising the meals on wheels service has decreased by 22% with just 58% of councils offering a financial subsidy.
- The average cost of a two-course lunchtime meal in 2018 is £3.60.

APSE submitted Freedom of Information requests to 211 local authorities across the UK, with the aim of establishing accurate information about which councils continue to provide a meals on wheels provision, where the service sits within the authority. The councils who stated that they provided a meals on wheels service were then surveyed during July and August 2018. A series of questions were asked in relation to their meals on wheels offering. The survey repeats earlier surveys conducted in 2014 and 2016 allowing trend information to be determined.

In a continuing trend from 2016, the number of authorities providing a service has further decreased with 42% of the UK's local authorities now offering a 'meals on wheels' type service. Of these, many purport to offer a service but contracts amount to little more than an agreement with a preferred supplier and are at zero cost to the

council budget. A significant number of councils provide no more than a list of suppliers, signposting the elderly to external providers including supermarket home delivery services.

Private sector providers have largely filled the gap where a council has withdrawn from the service, although the meals are usually at a comparatively higher price.

The number of councils reporting that they provide a financial subsidy for their meals on wheel service has seen a reduction of 22% since 2016 with just 58% of councils reporting that they are subsidising the service in 2018.

For 2018, there has been an average decrease of circa 5% in the cost of a meal which indicates that several high price providers have exited the market and others have made efficiencies in the way they supply and deliver meals. Precise reasons for the decrease was not captured by this survey.

The Local Authority (LA) models identified might be summarised as following:

- LA prepare and distribute
- LA buy and distribute
- LA tender and subsidise
- LA tender and service is standalone
- LA signpost only

Results

The Association for Public Service Excellence (APSE) carried out a survey of meals on wheels and other meals on wheels services across the UK during July and August 2018

The survey was intended to determine the arrangements for the delivery of meals on wheels, the related costs and the nature of the service offered.

COUNTRY	REGION	MOW SERVICE 2014	MOW SERVICE 2016	MOW SERVICE 2018
England	East of England	64%	64%	45%
	East Midlands	88%	50%	50%
	London	69%	59%	41%
	North East	25%	25%	17%
	North West	48%	17%	13%
	South East	67%	33%	39%
	South West	71%	53%	41%
	West Midlands	60%	53%	47%
	Yorkshire & The Humber	50%	44%	20%
Northern Ireland		100%	100%	80%
Scotland		94%	75%	61%
Wales		59%	50%	45%
UK		66%	48%	42%

In 2014, 66% of local authorities offered a 'meals on wheels' service, either directly or via an external contract. By 2016 our findings show this had significantly dropped to 48% and the results of the 2018 survey indicate that this has dropped to 42%. Although this is a reduction, it is not as significant as the decrease seen between 2014 and 2016, this could represent that there has been a stabilisation in the number of local authority providers withdrawing the provision.

The North West of England continues to be the least engaged and has seen the provision reduce to 13% from 17% in 2016. The East of England reports the largest decrease in service of 19% over the last two years. However, 45% of councils still retain the provision in this region. Northern Ireland (where the service is provided under contract to the Health & Social Care Trusts) notionally provides 80% service (with only the southern region reporting that there is no service offered), however meal numbers vary widely and eligibility criteria has been tightened.

It should be noted that the increase in the percentage of councils reporting that they provide a service in the South East from 33% to 39%, is due to increases in respondents to the survey in this region rather than an increase in provision.

With so many authorities, exiting the market, the basket of prices provides a less accurate comparison. However, across the UK there has been a 5% decrease in price to the recipient over the past 2 years.

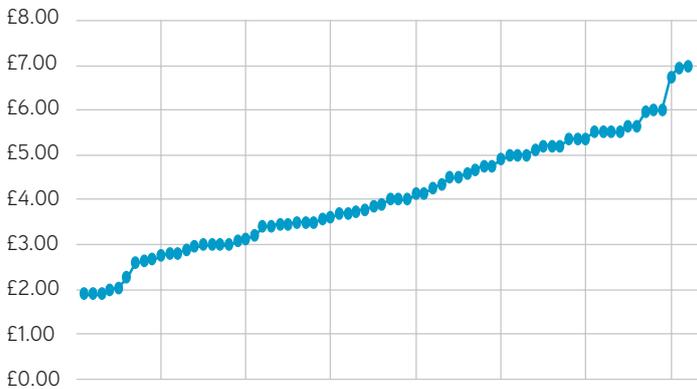
MEAL COST CHANGES

COUNTRY	REGION	MEAL COST AVERAGE 2016	MEAL COST AVERAGE 2018
England	East of England	£ 4.97	£ 4.74
	East Midlands	£ 5.59	£ 4.40
	London	£ 4.50	£ 3.87
	North East	£ 4.56	£ 3.20
	North West	£ 4.25	£ 4.17
	South East	£ 4.22	£ 5.35
	South West	£ 4.43	£ 5.02
	West Midlands	£ 4.61	£ 4.33
	Yorkshire & The Humber	£ 4.82	£ 4.58
	England average		£ 4.85
Northern Ireland average		£ 1.90	£ 1.90
Scotland average		£ 3.24	£ 3.25
Wales average		£ 4.48	£ 4.85
UK average		£ 4.30	£ 3.60

The average price in 2018

The average price in 2018 for a two-course lunchtime meal was £3.60, which is a decrease from the high reported in 2016 of £4.30, with Wales being the highest averaging £4.85 which represents an 8.2% increase from 2016 and Northern Ireland remains the lowest at £1.90. Since the last survey was conducted, England has seen the largest decrease in average price from £4.85 to £4.40. This decrease is mainly due to some high price providers exiting the market and has to be caveated by the low percentage of authorities in the region that provide meals on wheels. The prices in Scotland and Northern Ireland remained static.

COST OF A TWO-COURSE LUNCHTIME MEAL

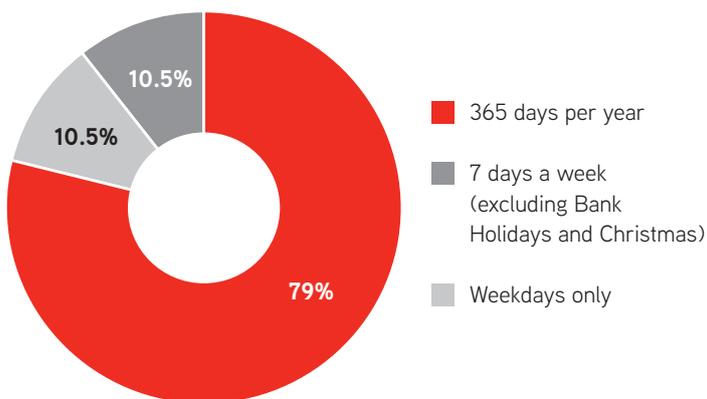


The survey asked how the pricing for meals were set. The majority of respondents, 60% reported that a banding table was used with the price being dependent on volume, 13.7% applied a fixed cost. In a small minority of councils, pricing remained the preserve of councillors with 5.9% saying that the pricing decision rested with the elected members.

For the first time, the majority of respondents report that the meals are supplied and delivered by an external provider. The survey highlights that many local authorities are working closely with charities who use volunteers to supply and deliver the meals and keep down the cost to the end consumer.

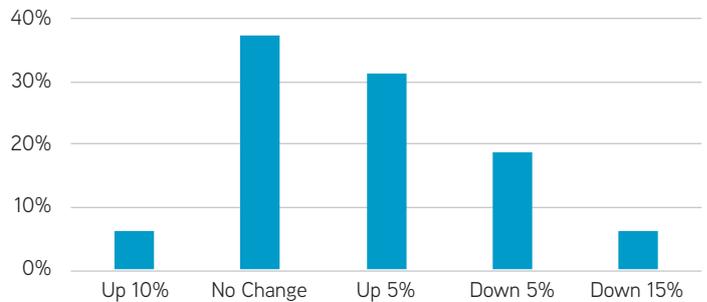
79% of respondents reported that their service operates a 365 day per year delivery service.

COUNT OF WHEN MEALS ARE DELIVERED



We asked providers to estimate how the number of meals provided would change over the next 12 months. Whilst 37.5% anticipated no change, 37.5% of respondents predicted an increase of between 5% - 10%. The remainder saw further reductions with 25% estimating that there would be a reduction of at least 5% - 10%.

FORECASTED PERCENTAGE CHANGE



When making a comparison with the sentiment in 2016 where 9% anticipated no change, the remainder anticipated reductions, with at least 27% of those expecting a decrease of at least 25%. The 2018 survey demonstrates that the forecasted decrease anticipated in the 2016 survey has not been realised. Although not captured in the data, this could be explained by authorities anticipating high reductions ceasing the provision, therefore will not be included in the data for 2018.

Of those providing a service 90% provide an element of menu choice, which represents an increase of 23% from 2016.

Where the local authority provides the service, it was reported by 29% of respondents that they provided a hot fresh cooked meal, 27% of authorities provide a combination of hot or frozen meals. It was stated by 17% of respondents that they provided a combination of hot, chilled and a frozen meal. A further 15% report that they only provided a frozen meal.

Of those delivering meals, 45.1% also offer a tea-time service which represents an increase of 3.4% from 2016 with the average price of the tea-time meal costing £3.12 on average. Approximately 5% of authorities reported that they provided breakfast for an average price of £3.00. The 2018 survey asked if a drink was provided with the meal, while the vast number of respondents (80%), advised that they did not provide a drink either free of charge or at an extra cost. Many of these reported that the person delivering the meal would pour water or prepare a hot drink if the recipient required it.

Around 59% of providers offer additional services include wellbeing checks and blankets. A small number, 4% advised that in addition to the meals on wheels service, they aided with personal care, meal preparation, shopping and domestic tasks. This highlights that the meals on wheels service is part of the authorities' wider social care offering.

Since 2016 there has been a reduction of 22% of councils reporting that they are subsidising the meals on wheels service. With the 2018 data showing that over 58% of councils who provide a service themselves continue to part subsidise that service, which represents a substantial decrease from the reported 80% in 2016, although there are wide variances in that subsidy. This indicates that councils are now moving to a position of providing the service at full cost to the service user, and this is supported by 42% of the respondents to the survey. This appears to reflect the increasing pressures on local authority care budgets.

There is a vast range in the number of meals served per day by each authority. The average ranges from circa 100 meals a day to circa 550 meals per day. Although not specified in the survey there could be several reasons for the variation which include the eligibility criteria applied to the service and the additional meals provided such as breakfast and tea-time meals.

Finally, in 2016, an additional question was added which concerned the effect of Brexit on confidence, 89% said they were unsure it would make any difference, and this trend continues in 2018 with a similar number of respondents stating that they were unsure how Brexit will impact on social care services.



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