

SILVERSNEAKERS PULSE SURVEY

In field May 5 - May 10, 2021
703 respondents
(Prior survey results compared where possible)

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SilverSneakers® Pulse surveys are designed to understand how our members are experiencing COVID-19 over time as it relates to fitness, nutrition, social connection and technology.

OVERALL IMPACT OF COVID-19

Effect on Seniors

Inability to visit with friends and family remains "top of mind" for impacting seniors' lifestyles, but its influence is declining.

Most Disruption

Inability to visit with friends and family in person



Disruption of normal routines



Stress & Anxiety

Levels of stress and anxiety are beginning to decline, moving closer toward pre-pandemic levels.

Experienced Stress

| | Pre-COVID-19 | Q1 2021 | Q2 2021 |
|------------------------|--------------|---------|---------|
| Not at all | 36% | 35% | 41% |
| Several days | 51% | 45% | 43% |
| More than half of days | 8% | 11% | 9% |
| Nearly every day | 5% | 9% | 7% |

Experienced Anxiety

| | Pre-COVID-19 | Q1 2021 | Q2 2021 |
|------------------------|--------------|---------|---------|
| Not at all | 44% | 41% | 47% |
| Several days | 44% | 40% | 38% |
| More than half of days | 8% | 10% | 8% |
| Nearly every day | 5% | 8% | 7% |

Contributors to stress and anxiety - Q2, 2021

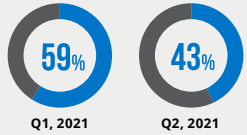
- 46% Concerns about health of friends/family
- 40% Limited social interaction
- 38% Concerns about my health
- 34% Not knowing when things will return to normal

FITNESS IMPACT

Seniors report an improvement in their physical activity level.

Results indicate that it is easier for seniors to attend the gym and spend time outdoors, compared to earlier in 2021.

Worse level of physical activity versus pre COVID-19



Main reasons for decline in physical activity

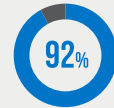
| | Q1 2021 | Q2 2021 |
|--|---------|---------|
| Not motivated to engage in physical activity | 48% | 44% |
| Unable to attend in-person classes at the gym | 42% | 38% |
| Unable to go to the gym to use their equipment | 37% | 29% |

Digital Solution Use & Retention
Seniors now more than ever before mention they will continue to use SilverSneakers digital exercise offerings in addition to the gym.

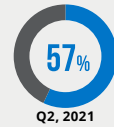
Participated in digital exercise offerings



Will continue using digital offerings in addition to gym



Plan to exercise in next 3 months



Plan to or have returned to the gym



2 OUT OF 3

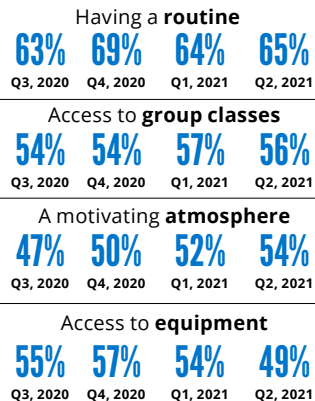
who plan to return to the gym will do so within one month of it being deemed safe with measures in place (Q2, 2021).

- 51% Immediately after
- 58% Within just weeks
- 67% Within 1 month
- 75% Within 2 months
- 78% Within 3 months

Motivating Factors for Gym Return

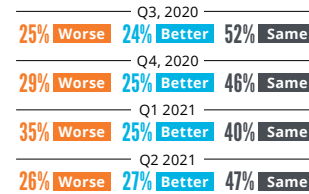
Access to group classes and a motivating atmosphere at the gym are important in establishing a routine for seniors. Equipment continues its decline.

Factors motivating a return to the fitness center/gym



NUTRITION IMPACT

Fewer seniors report inferior eating habits compared to the start of the year.



Main reasons for eating habits Q2, 2021

| Worse | Better |
|-----------------------------------|-----------------------------------|
| 60% Snacking | 69% Eating healthier foods |
| 43% Choose unhealthy food options | 56% Eating more home-cooked meals |

Food insecurity currently affects about 1 in 20 seniors.

| | Worried food would run out before I had money to buy more | | |
|----------------|---|----------|----------|
| | Q4, 2020 | Q1, 2021 | Q2, 2021 |
| Often true | 3% | 1% | 1% |
| Sometimes true | 9% | 6% | 5% |
| Never true | 85% | 91% | 92% |
| Don't know | 3% | 2% | 2% |

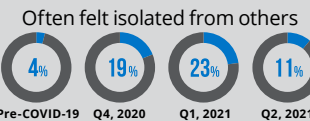
| | Food did not last and I did not have money to buy more | | |
|----------------|--|----------|----------|
| | Q4, 2020 | Q1, 2021 | Q2, 2021 |
| Often true | 2% | 1% | 1% |
| Sometimes true | 8% | 5% | 4% |
| Never true | 89% | 92% | 92% |
| Don't know | 2% | 2% | 2% |

| | Food would run out because not able to/felt uncomfortable going to store | |
|----------------|--|----------|
| | Q1, 2021 | Q2, 2021 |
| Often true | 2% | 2% |
| Sometimes true | 12% | 9% |
| Never true | 85% | 87% |
| Don't know | 1% | 2% |

SOCIAL CONNECTION

Feelings of social isolation are at their lowest levels since the start of the pandemic.

Seniors used **video calls** more in 2021 than in 2020 for a variety of uses.



#1 Inability to visit with friends and family remains top-ranked in terms of what is causing disruption to people's lives.

Used video calls/live streaming for the following:

| | Q4, 2020 | Q1, 2021 | Q2, 2021 |
|---|----------|----------|----------|
| Socially connecting with friends & family | 61% | 69% | 68% |
| Meetings (work, clubs, church groups, etc.) | 48% | 55% | 60% |
| Medical or therapy appointments | 46% | 47% | 52% |
| Exercise classes | 40% | 45% | 48% |
| Learning (hobbies, interests, etc.) | 29% | 38% | 39% |