

SENIOR HEALTHY LIVING SURVEY BY SILVERSNEAKERS

A Tivity Health Presentation Created By
Morning Consult

DECEMBER 2021



ABOUT US

Morning Consult is a global data intelligence company delivering insights on what people think in real time. By surveying tens of thousands across the globe every day, Morning Consult is unmatched in scale and speed: It determines the true measure of what people think and how their decisions impact business, politics, and the economy.

Industry leaders rely on Morning Consult's proprietary technology and analysis for real-time intelligence to transform information into a competitive advantage.

KEY FINDINGS

1. Given the currently holiday season, Senior sentiment is somewhat mixed this wave. Positive indicators like lessening stress and a decrease in feelings of isolation stand out, as do negative indicators like growing financial concerns and levels of disruption to normal routines.
2. Most Seniors continue to exercise by walking around their house or outside (57%), though even among gym-going Seniors, 30% are not planning to return to the gym once measures are put in place.
3. Food insecurity levels have notably decreased since the previous wave. In terms of eating habits, most Seniors have not changed much, but those who have improved said that eating less has helped.
4. White Seniors tend to have more distress and a higher likelihood of returning to the gym than non-white Seniors. Additionally, urban and suburban Seniors are almost equally as likely to say that their eating habits have not changed since the beginning of the pandemic.
5. On average, Seniors positively rate their quality of life 7 out of 10, both currently and thinking ahead to 5 years from now.

Methodology: This poll was conducted on November 22, 2021, by Morning Consult on behalf of Tivity Health. This poll was fielded among a national sample of 300 Adults age 65+ enrolled in Medicare Advantage. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 6 percentage points, varying by demographic segment. Data from September 13, 2021, onward have been weighted to approximate a target sample of Adults based on gender, educational attainment, age, and race/ethnicity. *Survey questions with extremely low N-sizes due to specific response requirements have been omitted from this report.*

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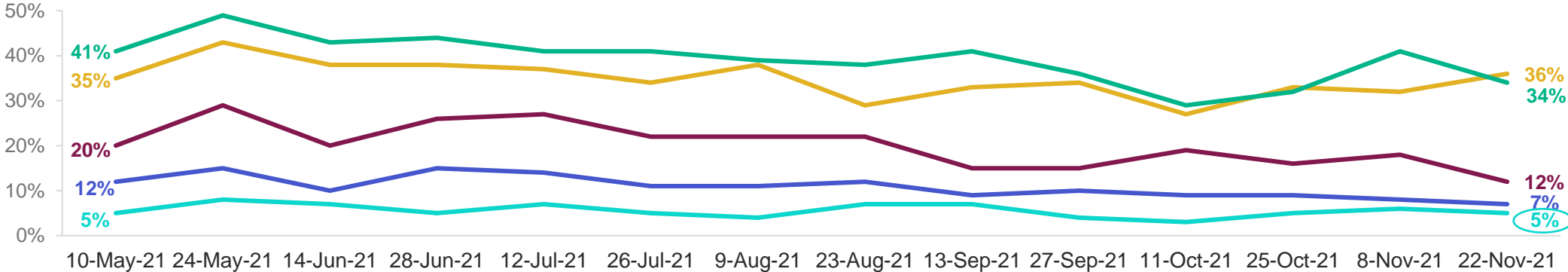
VIDEO CALLS AND LIVE STREAMS

Throughout the pandemic, the percentage of Seniors using video calls for exercise classes has remained consistently low (5%).

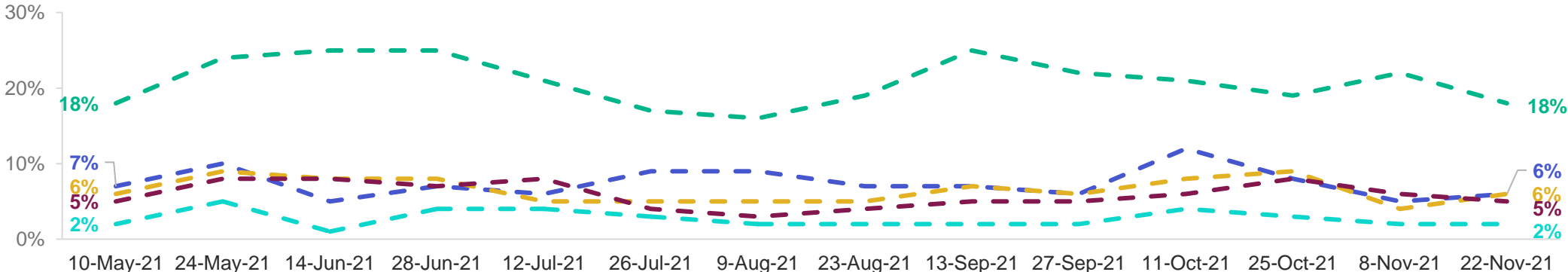
Have you used video calls or live streaming for any of these types of interactions? Please select all that apply.

- Exercise classes
- Learning (hobbies, interests, etc.)
- - - Socially connecting with friends & family
- Medical or therapy appointments
- Meetings (work, clubs, church groups, etc.)

Yes, **during** the COVID-19 pandemic



Yes, **before** the COVID-19 pandemic



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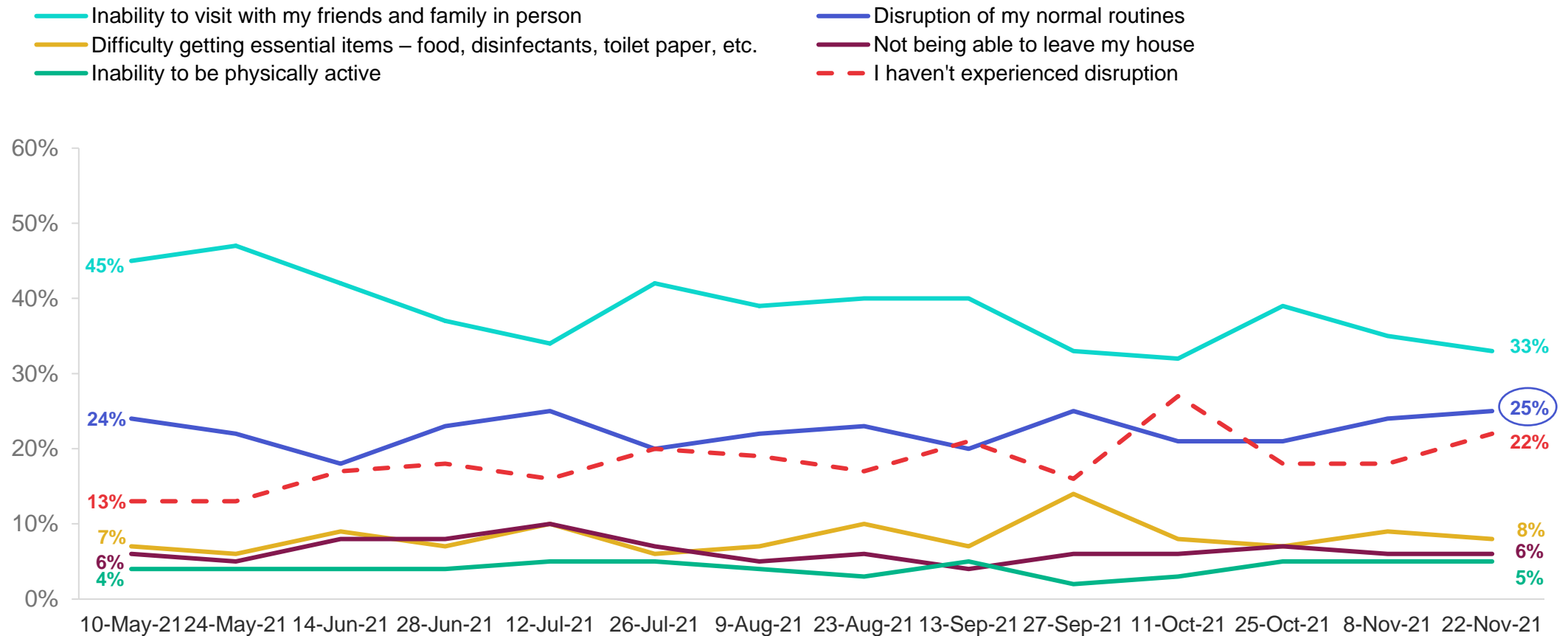
**APPENDIX: SOCIALIZING DURING COVID-19, MEDICARE ADVANTAGE PLAN BENEFITS, SOCIAL MEDIA
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DISRUPTION DURING COVID-19

The portion of Seniors whose normal routines have been most disrupted since the onset of COVID-19 is on the rise again after a small decline in early October.

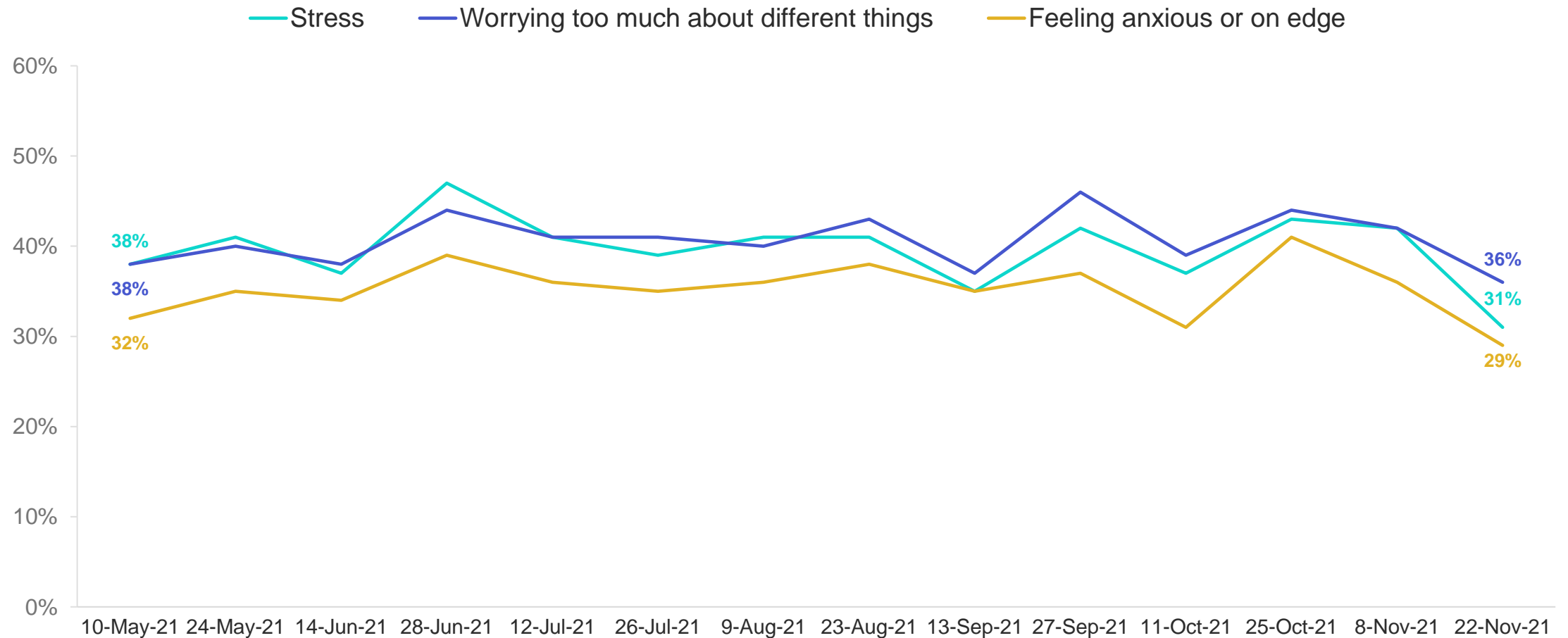
Since the onset of COVID-19, which of the following has caused the most disruption to your life?



DISTRESS

Across the last few waves, Seniors have felt less worried, stressed, and anxious.

Over the last two weeks, how often have you experienced any of the following feelings? *Showing total experienced*

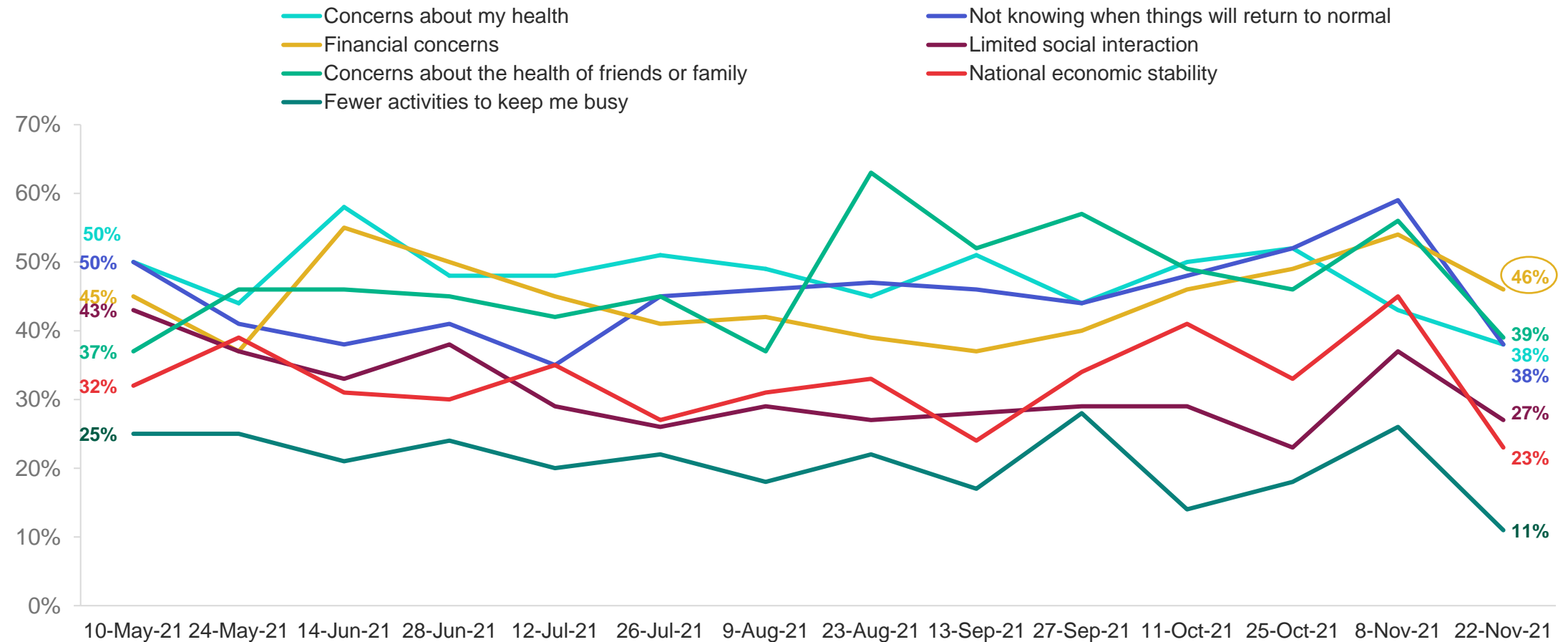


DISTRESS

Though less intense this wave, nearly half of Seniors (46%) point to financial concerns as the cause of their distress - most common among other causes.

If you've been experiencing worry, stress, or anxiety, what contributes to those feelings?

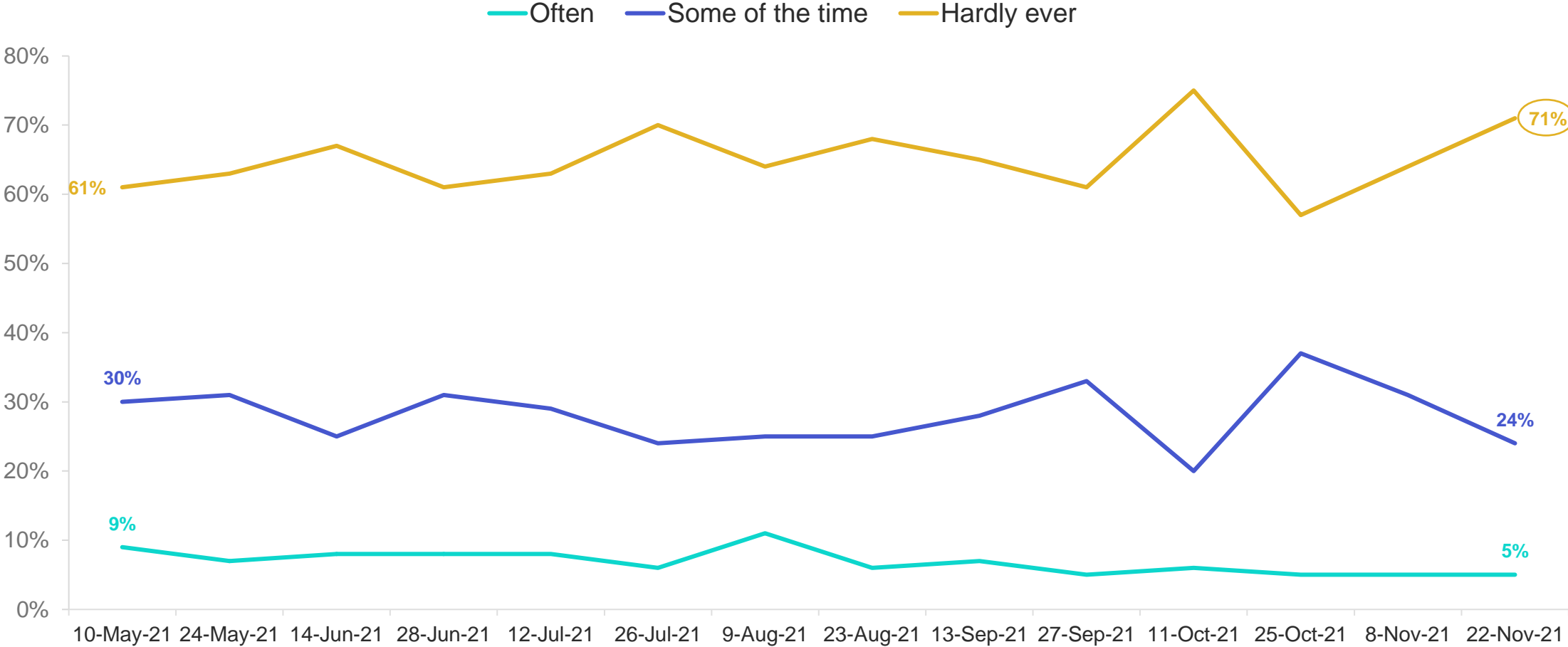
Among Seniors Who Experienced Worry, Stress, or Anxiety



ISOLATION

Perhaps due to the holiday season, the number of Seniors who say they hardly ever feel isolated has been increasing over recent waves.

How often have you felt isolated from others in the past week?



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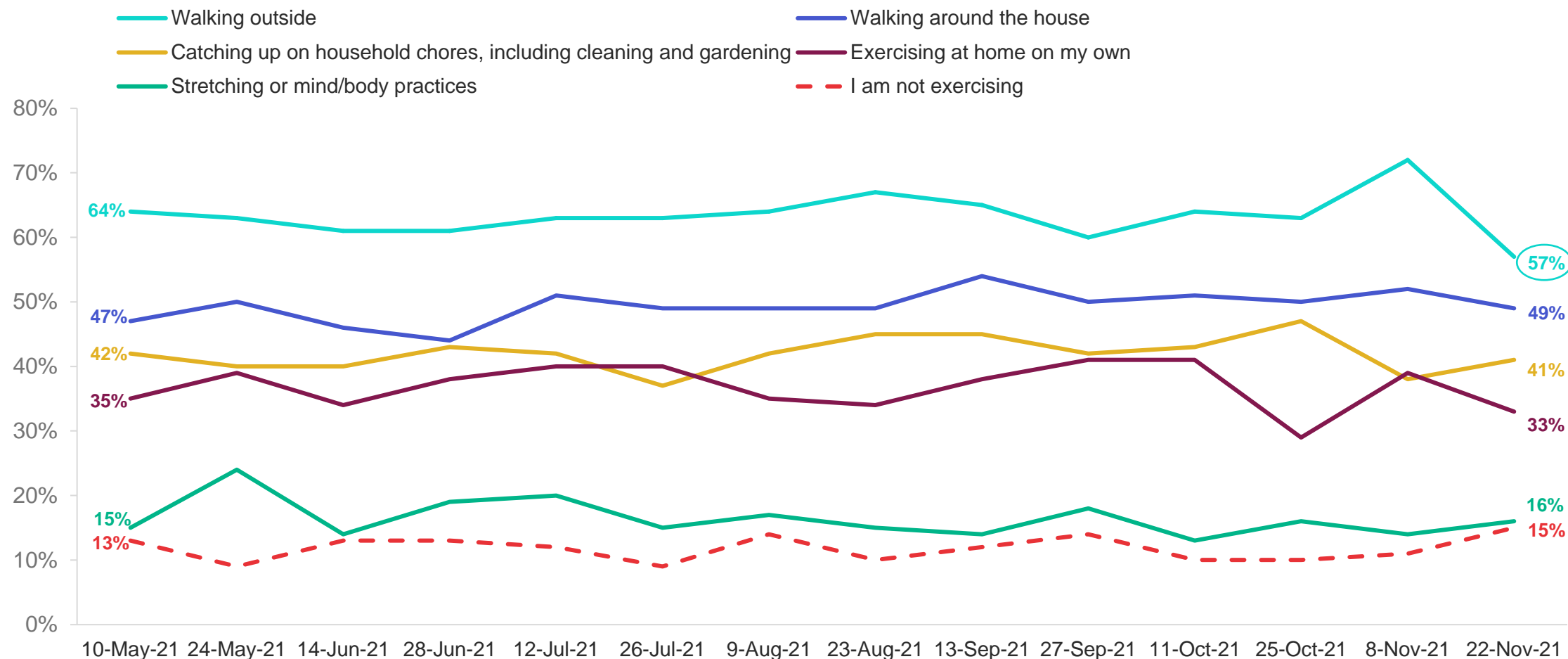
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PHYSICAL ACTIVITY DURING COVID-19

Across all waves, walking outside (57%) has been the most frequent activity amongst Seniors.

What are you currently doing to stay physically active? Please select all that apply.

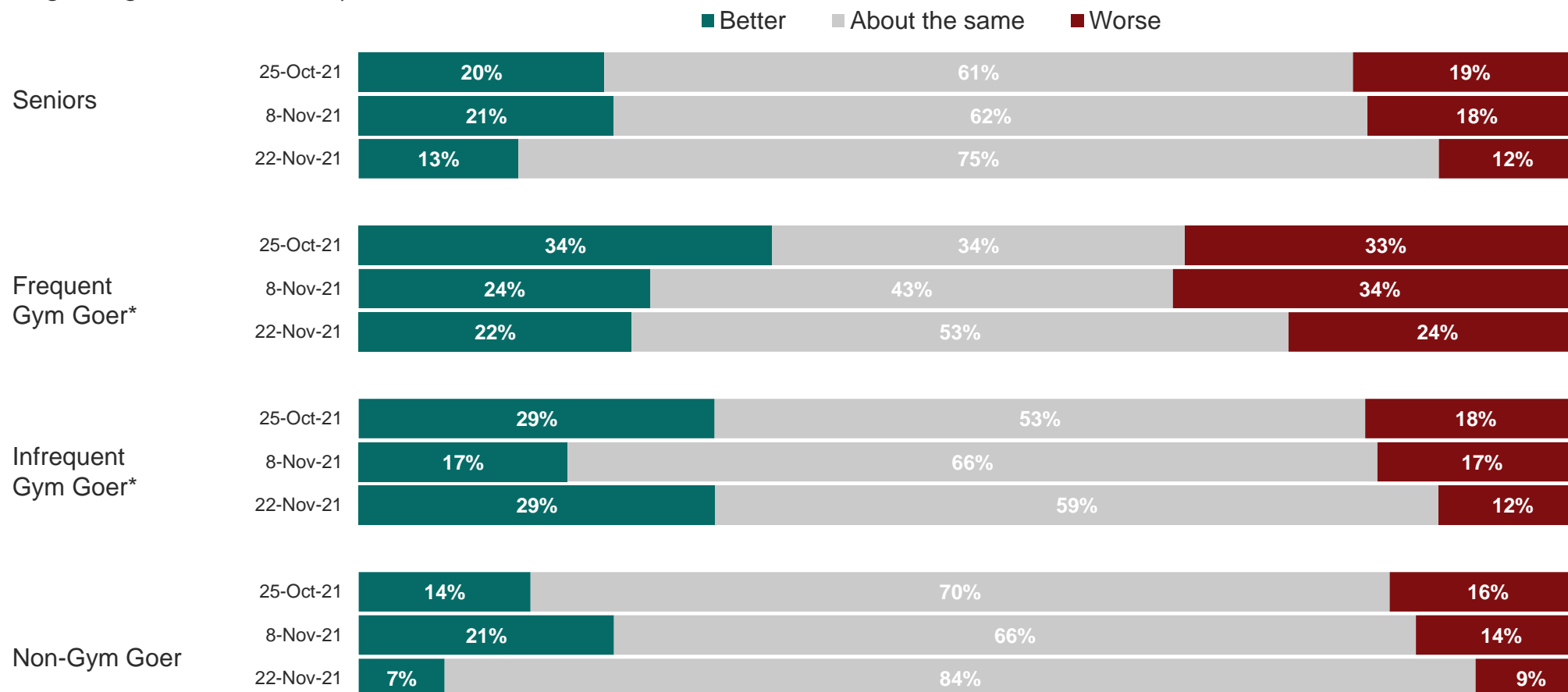


Activities <10% Not Shown: Exercising on my own at a gym, health club, or community center; Doing exercise videos; Doing live exercise classes over the internet; Attending live exercise classes at a gym, health club, or community center; Attending live exercise classes in my community not in a gym or community center; Other

PHYSICAL ACTIVITY DURING COVID-19

3-in-4 Seniors (75%) rate their level of physical activity as "about the same" compared to 3 months ago, an increase of 13 points since last wave.

How would you rate your level of physical activity now compared to 3 months ago? Please select one. (Previously "compared to the beginning of COVID-19?")



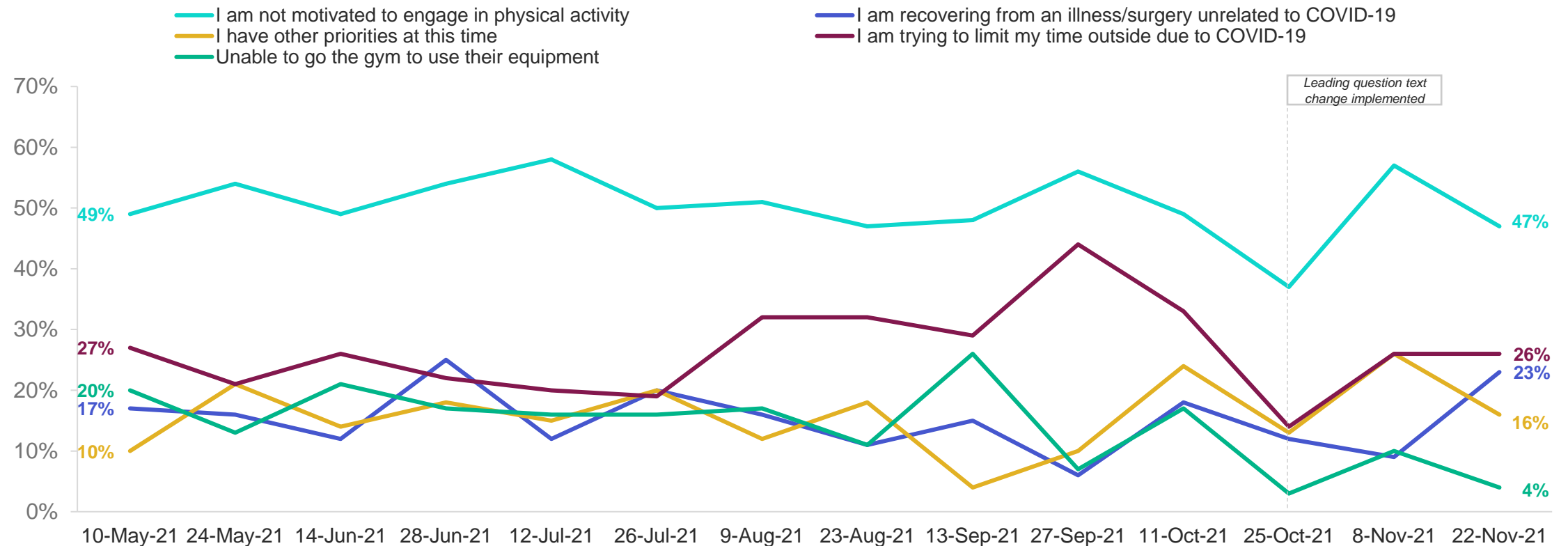
*Data should be treated directionally due to small sample size.

DECLINE IN PHYSICAL ACTIVITY DURING COVID-19

Seniors attribute a lack of motivation to declines in their physical activity (47%), consistently highest across all waves.

What do you think has led to this decline in your physical activity? Please select all that apply.

**Among Seniors Who Experienced a Decline in Physical Activity Compared to 3 Months Ago (Previously “Compared to the Beginning of COVID-19”)*

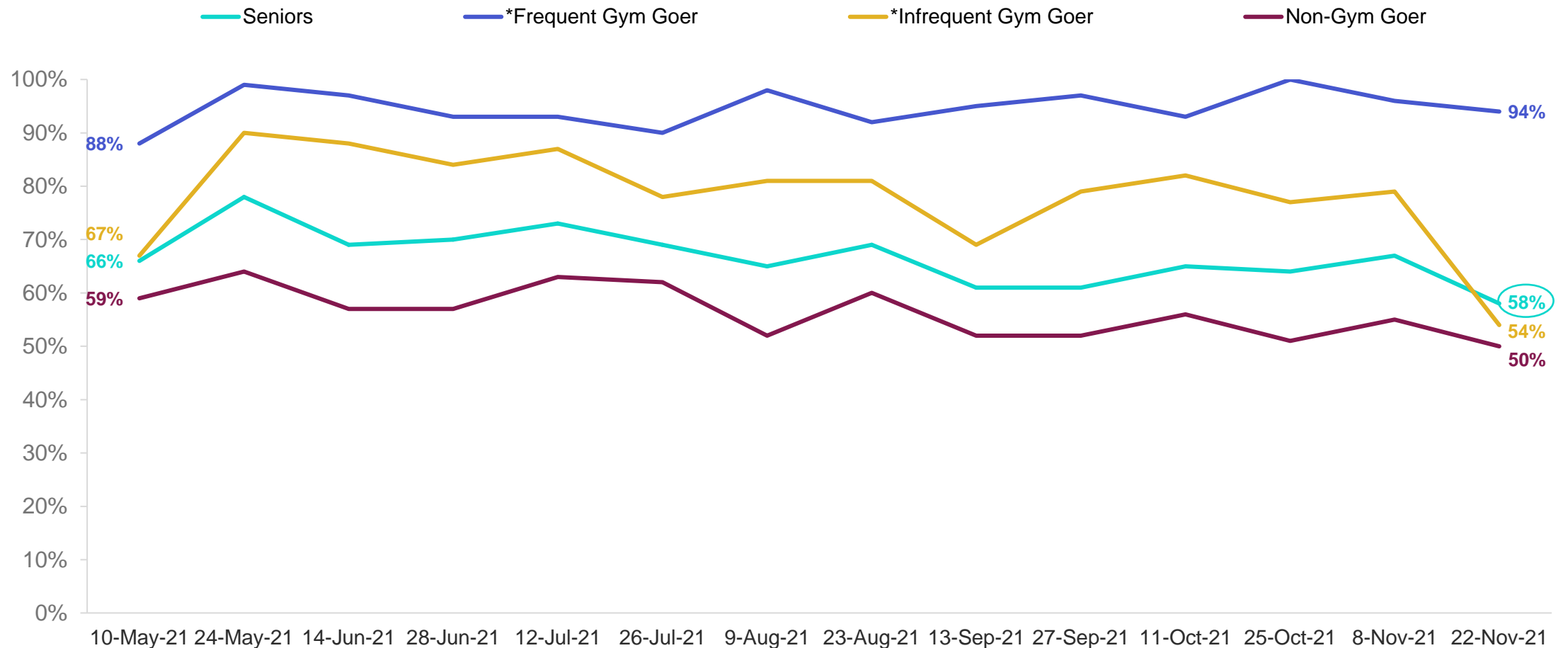


*Data should be treated directionally due to small sample size.

PHYSICAL ACTIVITY IN THE NEXT 3 MONTHS

58% of Seniors plan to exercise in the next few months, down since last wave after stabilizing for several waves.

Do you plan to exercise in the next 3 months? *Showing Yes*



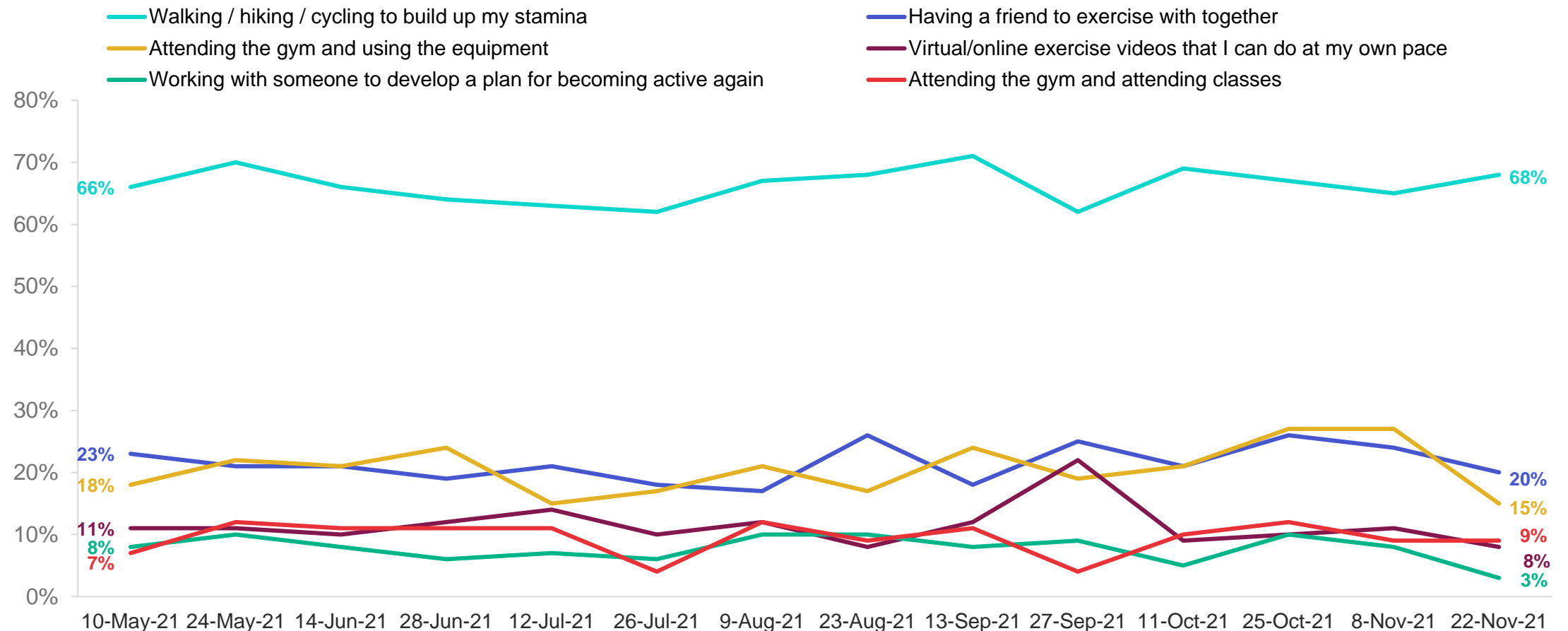
*Data should be treated directionally due to small sample size.

PHYSICAL ACTIVITY DURING COVID-19

Activities to build stamina are by far most helpful for Seniors looking to get back into shape.

What will help you to get back into a physically active routine? Please select all that apply.

Among Seniors Who Plan to Exercise in the Next 3 Months

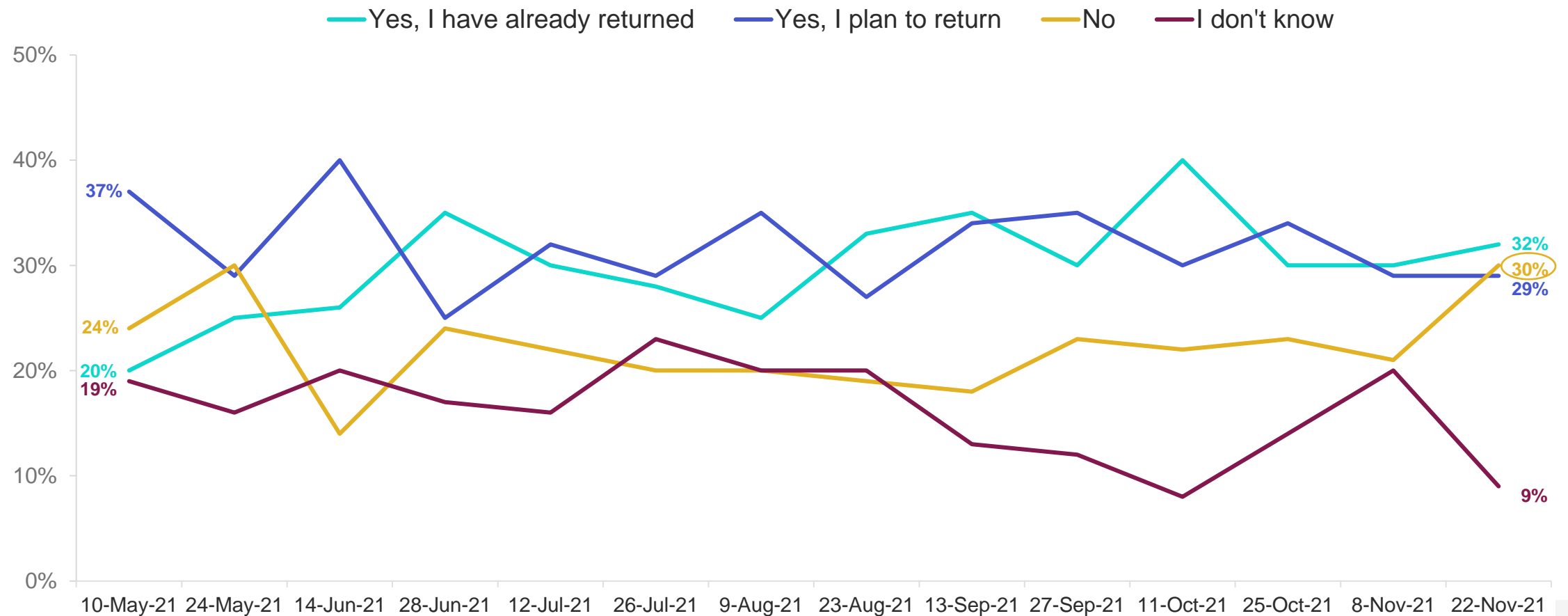


RETURN TO THE GYM

30% of gym-going Seniors do not plan on returning to the gym once measures are put in place, up 10 points since last wave.

Do you plan to return to your fitness center/gym once it is deemed safe and measures are put in place?

* Among Gym Goers (Frequent + Infrequent)



*Data should be treated directionally due to small sample size.

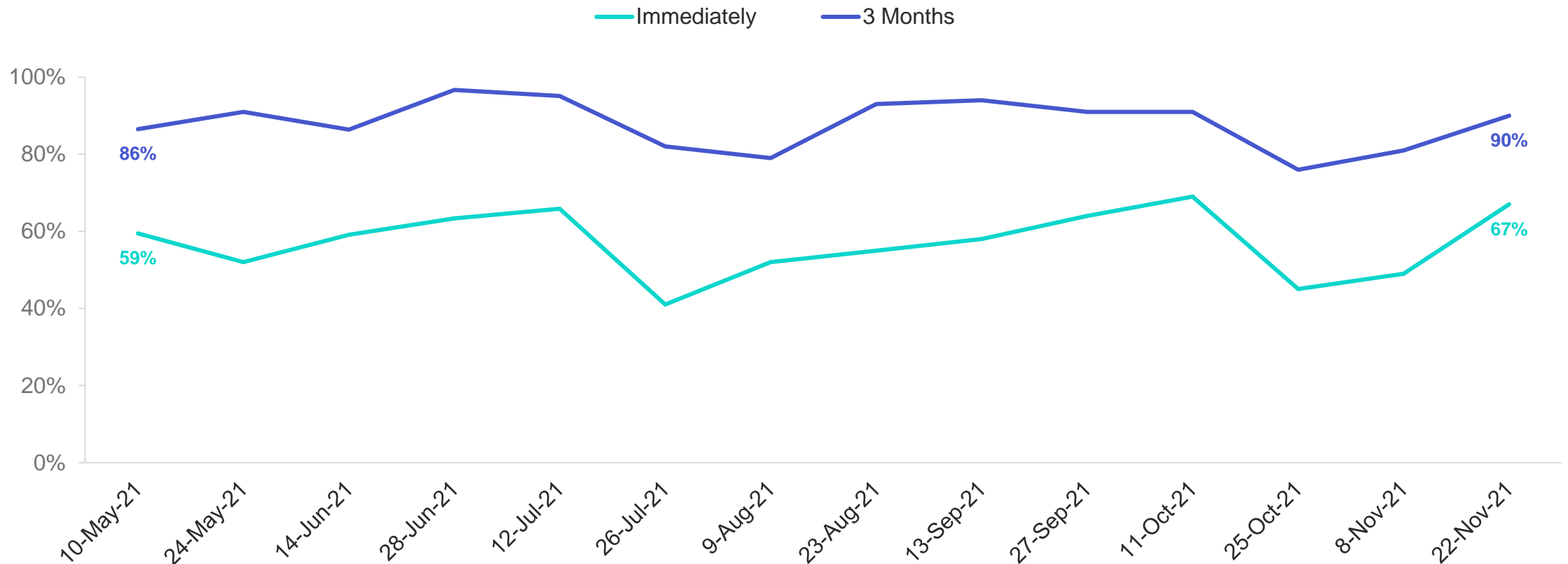
RETURN TO THE GYM

After a sharp decrease, the portion of Seniors who will return to the gym immediately has rebounded to 67%.

How much do you agree or disagree with each of the following statements as it relates to returning to your fitness center/gym?

I will return to the fitness center/gym...

**Among Seniors Who Have Returned or Plan to Return to the Gym*



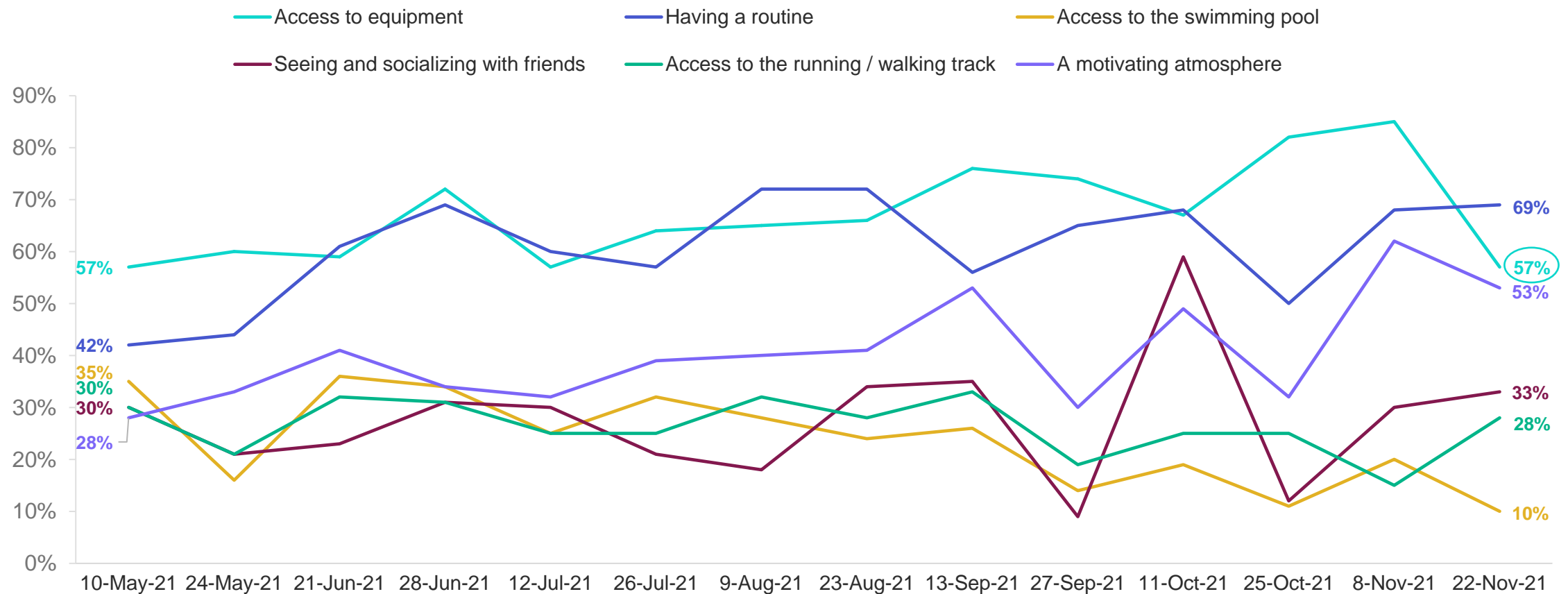
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RETURN TO THE GYM

Notably fewer Seniors are looking forward to equipment access when returning to the gym.

What are you most looking forward to when returning to the fitness center/gym when permitted?

**Among Seniors Who Plan to Return to the Gym in the Next 3 Months*



Gym Benefits Not Shown: Time to myself; Access to group classes; Access to the steam room, sauna, or hot tub; My personal trainer; Access to racquet / sports courts; Other

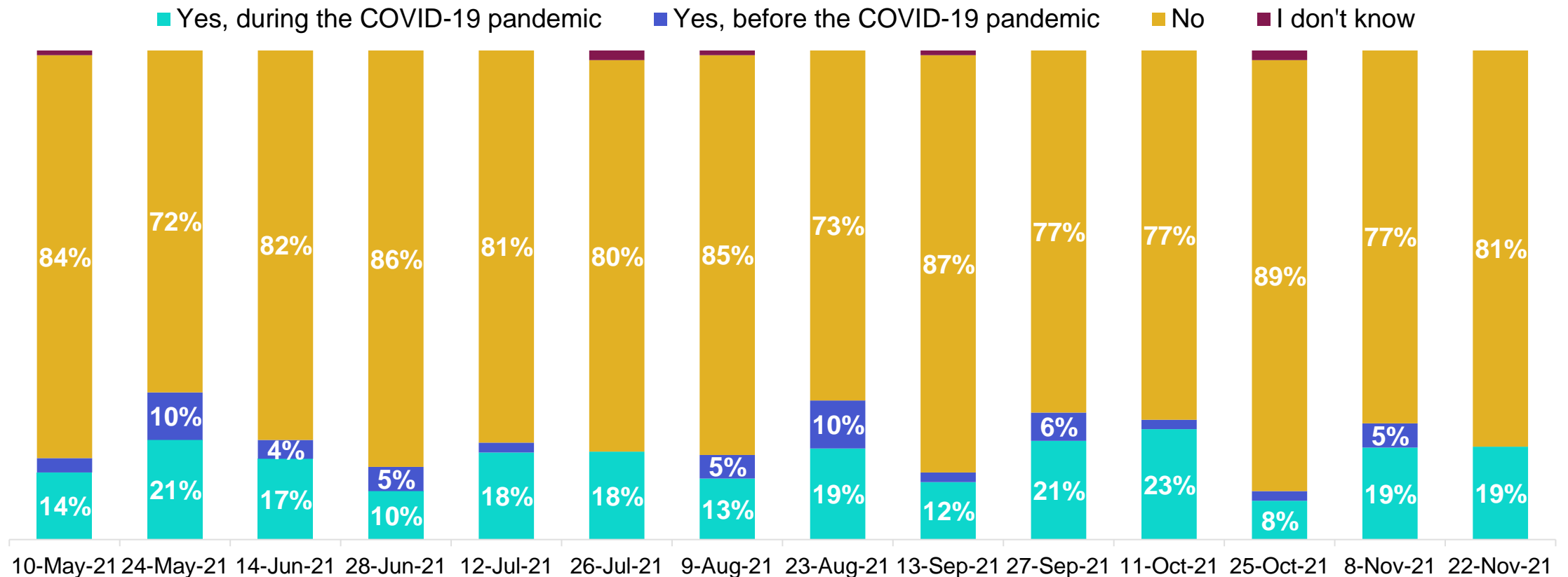
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VIRTUAL / DIGITAL FITNESS SOLUTIONS

Across all waves, roughly 8-in-10 Seniors have not participated in virtual fitness solutions.

Have you participated in any virtual/digital fitness solutions (ex: live virtual classes, on-demand classes online, programming on mobile apps)? Please select all that apply.

*Among Gym Goers (Frequent + Infrequent)



Data labels <4% not shown.

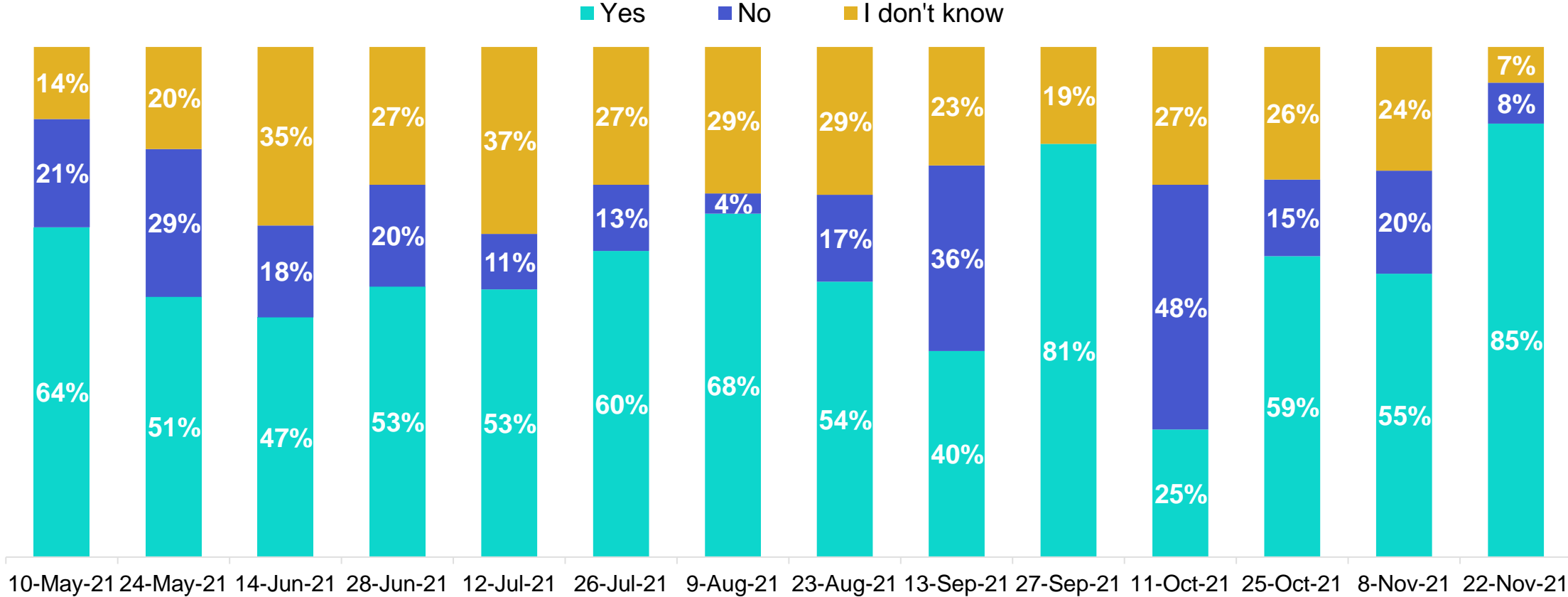
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VIRTUAL / DIGITAL FITNESS SOLUTIONS

For the first time since late September, more than 80% of Seniors report that they will continue to use virtual fitness offerings when gyms re-open.

Will you continue to use any virtual/digital fitness offerings once fitness centers/gyms have reopened and are deemed safe?

**Among Gym Goers (Frequent + Infrequent) Who Have Participated in Virtual/Digital Fitness Solutions*



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FOOD INSECURITY

Food insecurity levels for Seniors have dropped substantially.

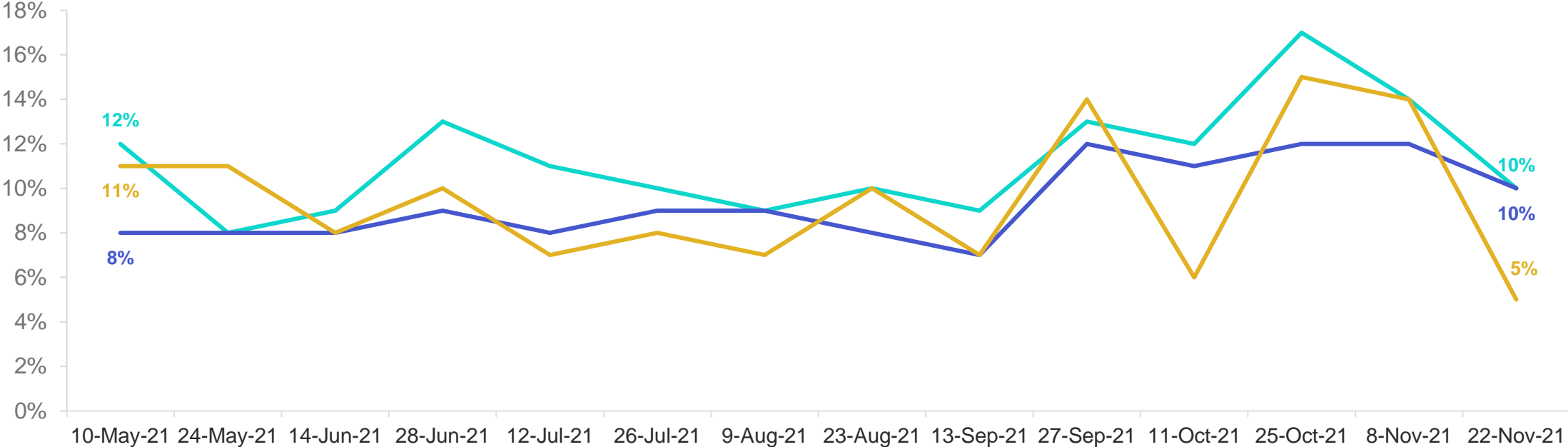
Within the past 30 days, I worried my food would run out before I got money to buy more.' Was that often true, sometimes true, or never true for you?

Within the past 30 days, the food I bought just didn't last and I didn't have money to get more.' Was that often true, sometimes true, or never true for you?

Within the past 30 days, I was concerned that my food would run out because I was not able or felt uncomfortable going to the store.' Was that often true, sometimes true, or never true for you?

Showing Often True + Sometimes True

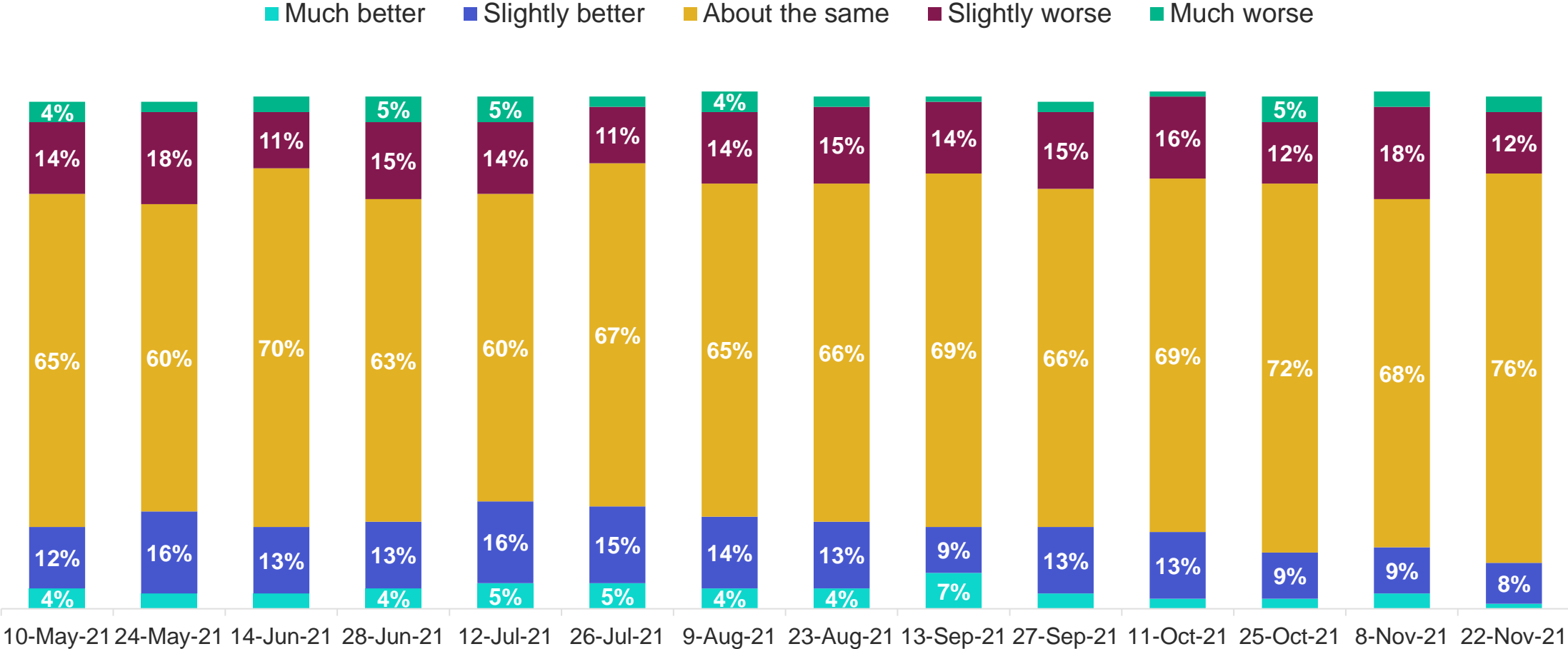
- Within the past 30 days, I worried my food would run out before I got money to buy more.
- Within the past 30 days, the food I bought just didn't last and I didn't have money to get more.
- Within the past 30 days, I was concerned that my food would run out because I was not able or felt uncomfortable going to the store.



EATING HABITS DURING COVID-19

Roughly 3-in-4 Seniors rate their eating habits as "about the same" compared to the start of the pandemic.

How would you rate your eating habits now compared to more than a year ago at the beginning of COVID-19?



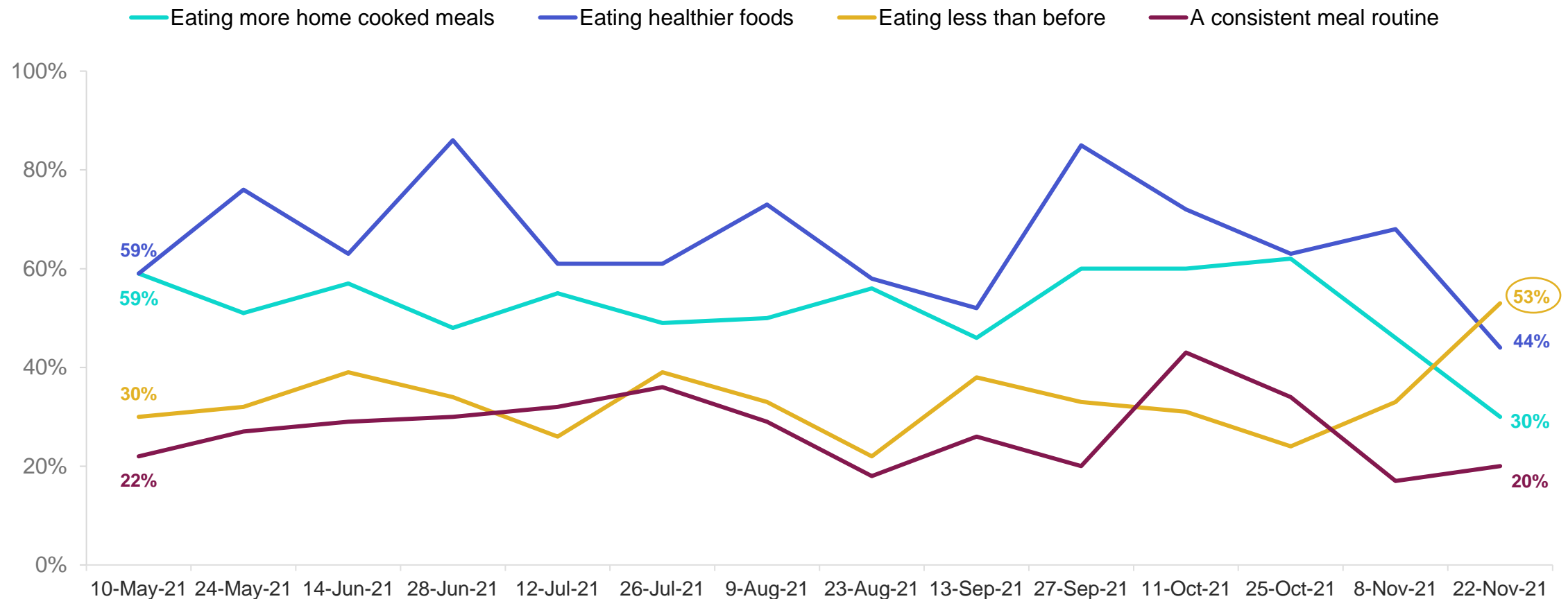
Data labels <4% not shown.

EATING HABITS DURING COVID-19

More Seniors than in past waves believe that eating less has led to an improvement in their eating habits (53%).

What do you think has led to this improvement in your eating habits? Please select all that apply.

**Among Seniors Who Have Improved Their Eating Habits*



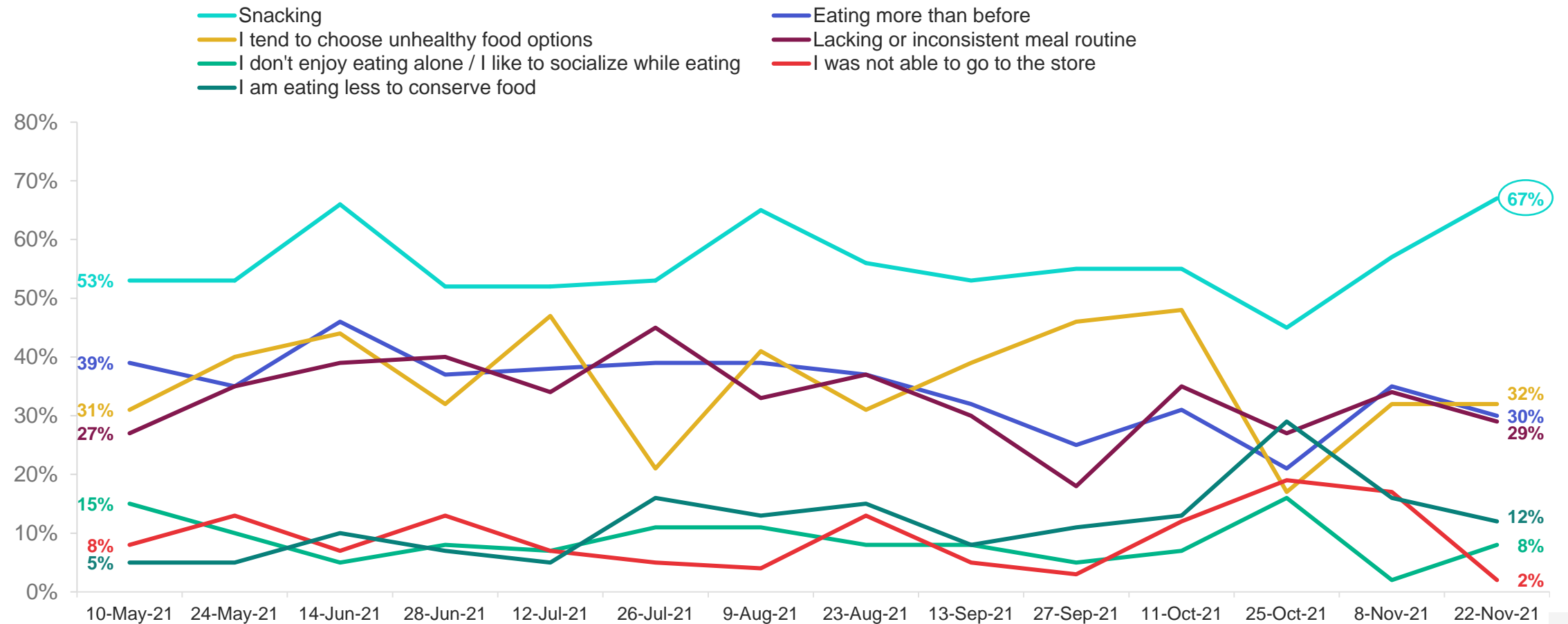
**Data should be treated directionally due to small sample size.*

EATING HABITS DURING COVID-19

Snacking remains the top culprit behind worsening eating habits among Seniors (67%).

What do you think has led to this decline in your eating habits? Please select all that apply.

**Among Seniors Who Have Worsened Their Eating Habits*



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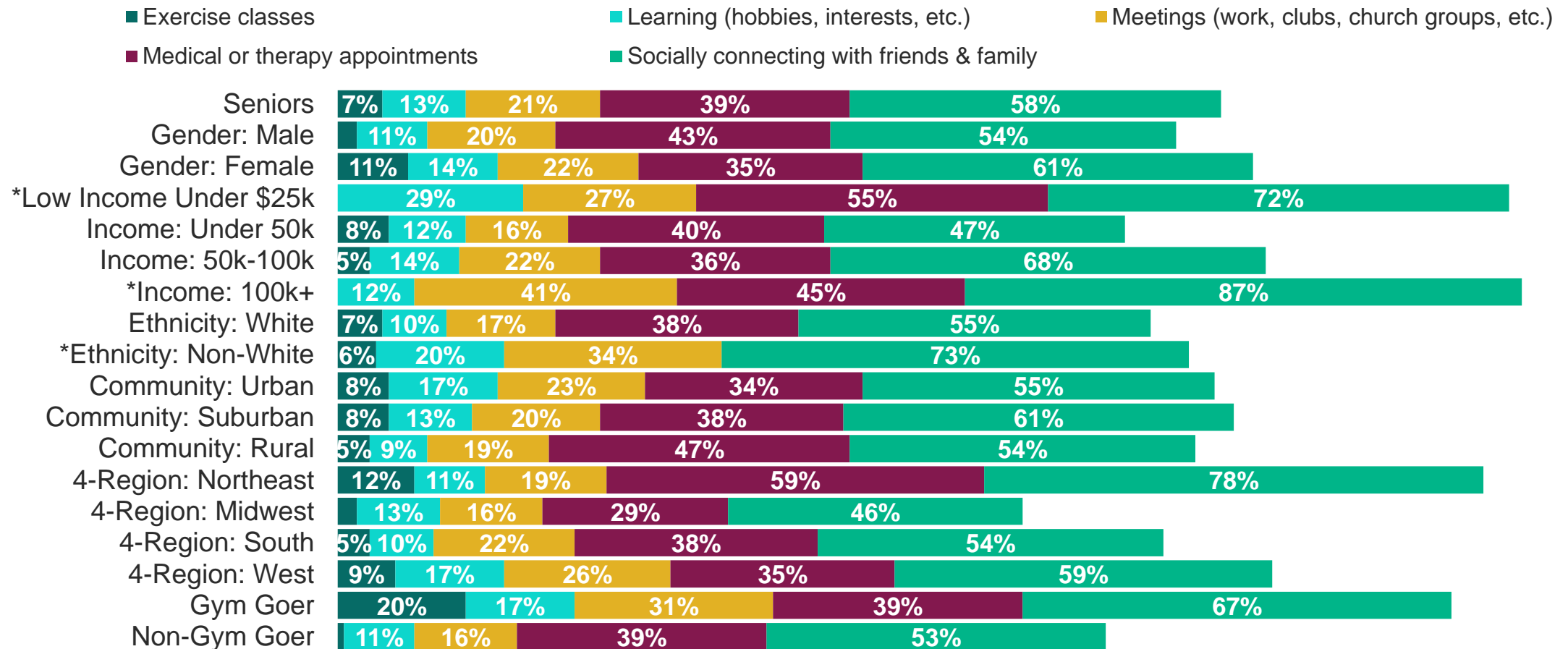


VIDEO CALLS AND LIVE STREAMS

Suburban Seniors (61%) are more likely to socially connect with friends and family through video calls than urban (55%) and rural Seniors (54%).

Have you used video calls or live streaming for any of these types of interactions? Please select all that apply.

Among Seniors who used videos calls before or during the COVID-19 pandemic



Data labels <5% not shown.

*Data should be treated directionally due to small sample size.

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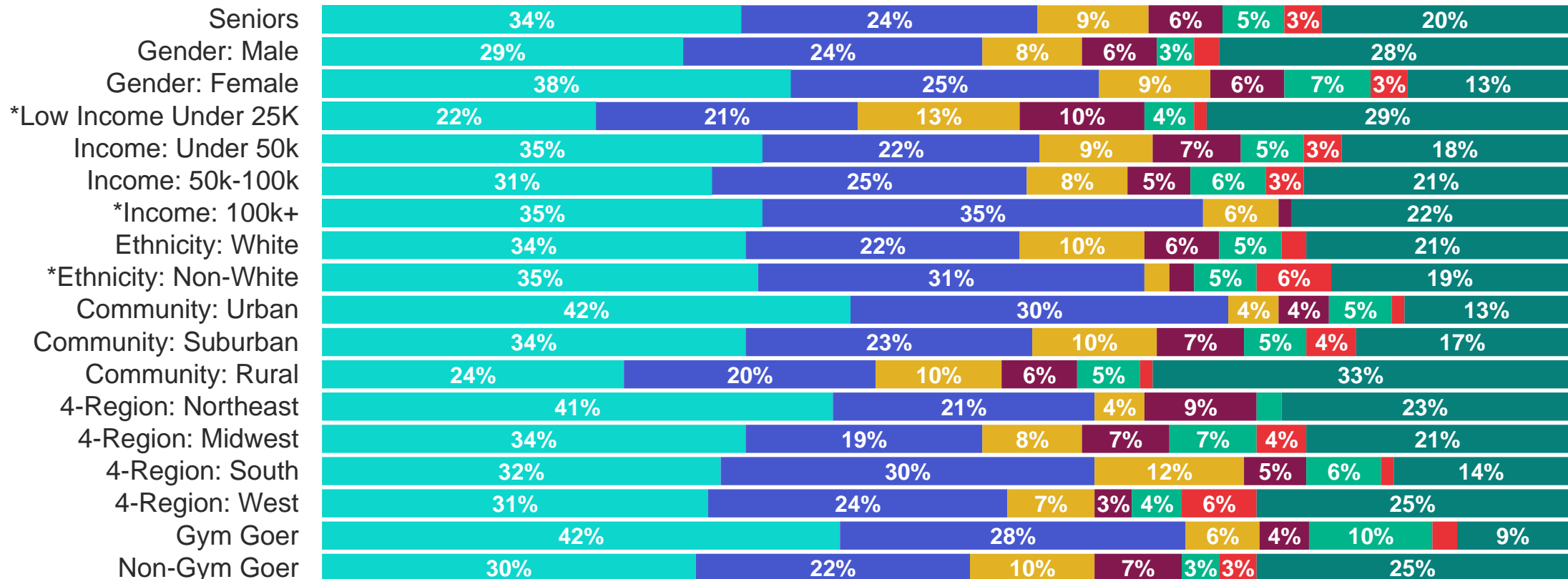


DISRUPTION DURING COVID-19

Gym goers and urban Seniors are more likely to say that not being able to see people has caused the most disruption to their lives.

Since the onset of COVID-19, which of the following has caused the most disruption to your life?

- Inability to visit with my friends and family in person
 - Difficulty getting essential items – food, disinfectants, toilet paper, etc.
 - Inability to be physically active
 - I haven't experienced disruption
- Disruption of my normal routines
 - Not being able to leave my house
 - Inability to have people in my home to help



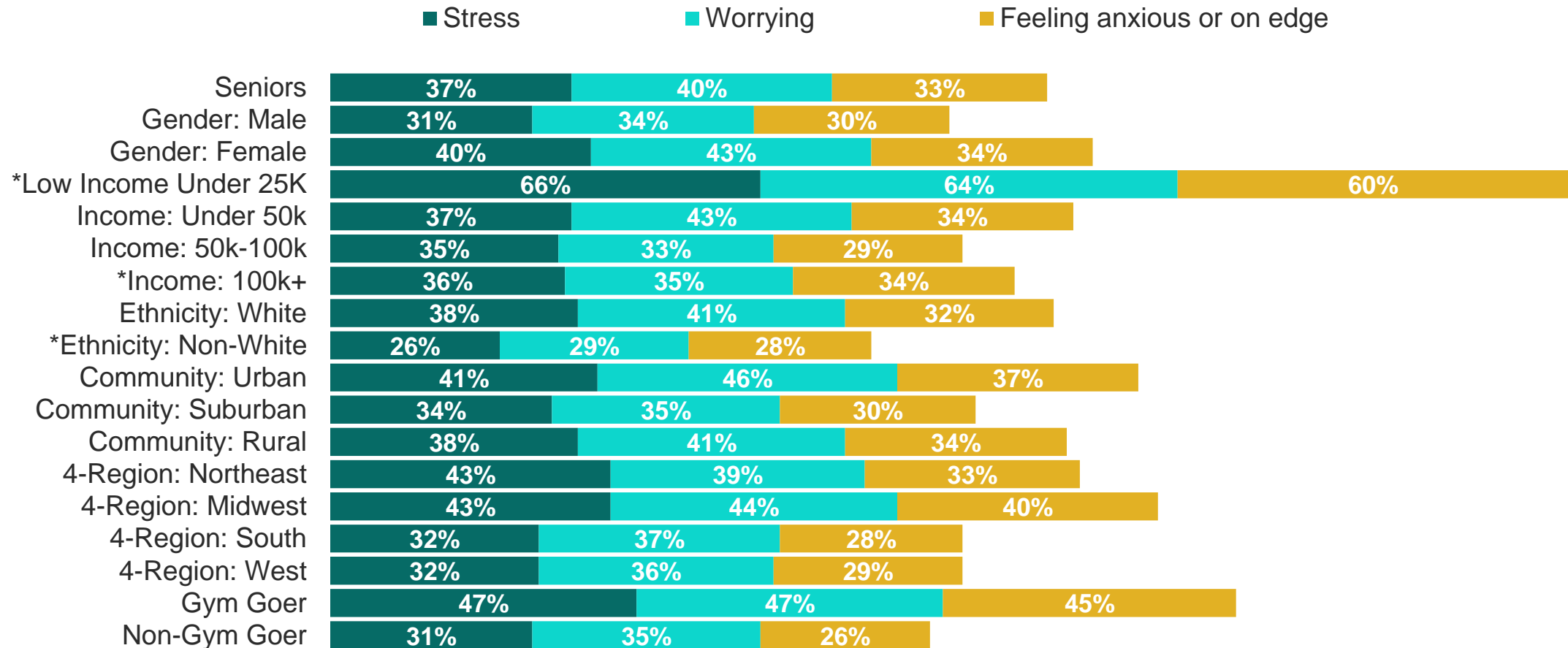
Data labels <3% not shown.

*Data should be treated directionally due to small sample size.

DISTRESS

White Seniors are more worried, stressed, and anxious than non-white Seniors recently.

Over the last two weeks, how often have you experienced any of the following feelings? *Showing total experienced*

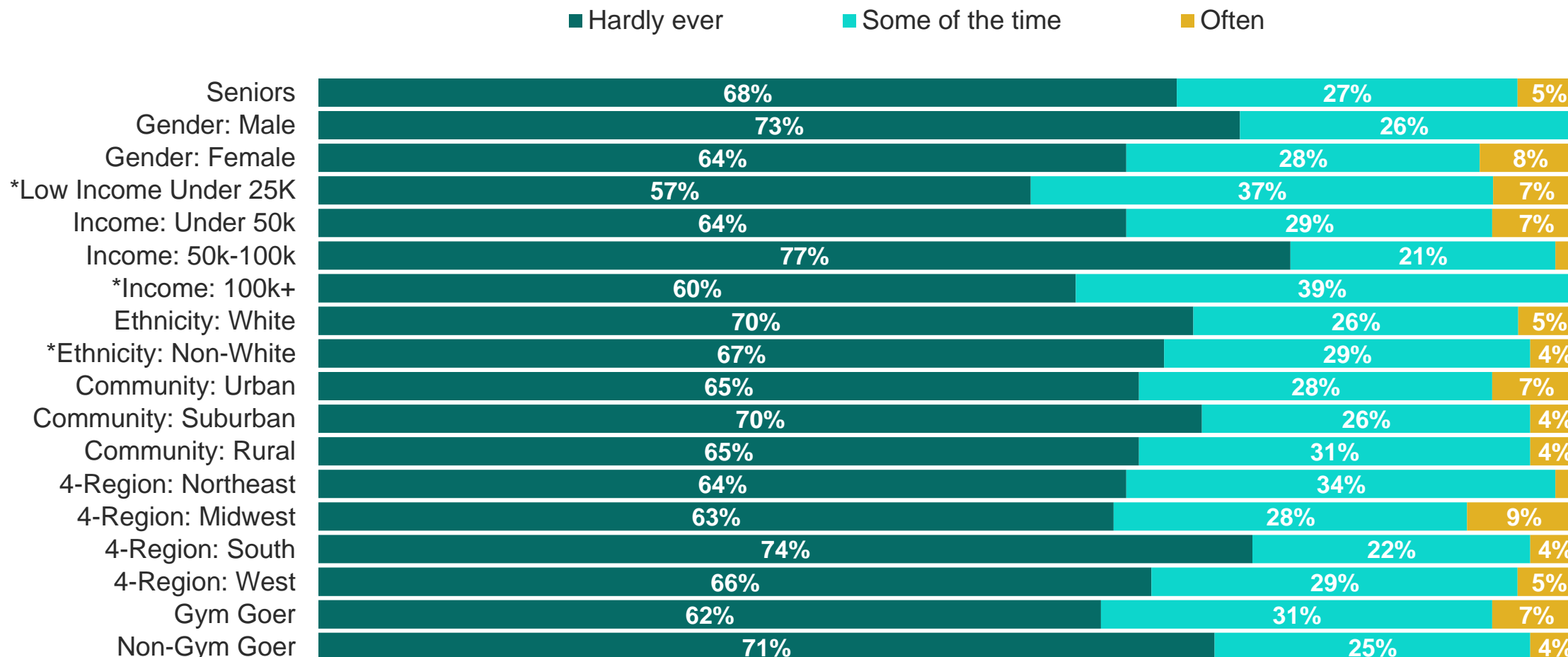


*Data should be treated directionally due to small sample size.

ISOLATION

Mid-income Seniors are reportedly the least isolated with 77% saying they hardly ever felt isolated.

How often have you felt isolated from others in the past week?



Data labels <4% not shown.

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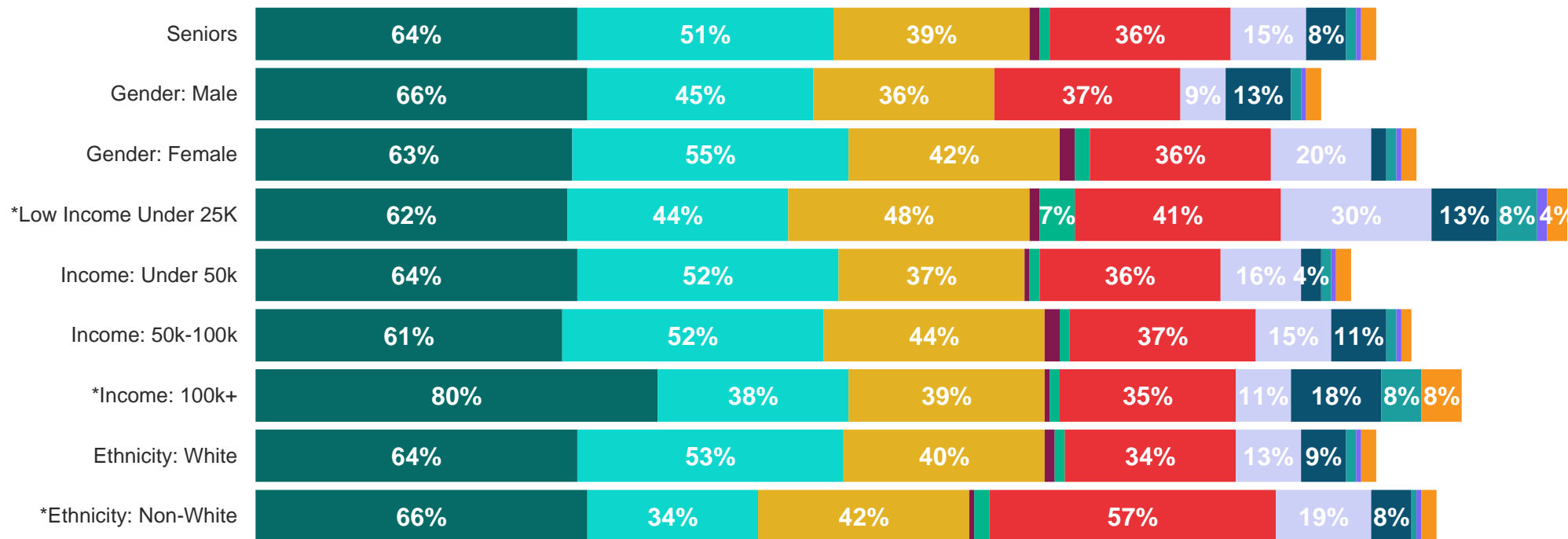


PHYSICAL ACTIVITY DURING COVID-19

Seniors are mostly staying physically active by either walking outside or around the house.

What are you currently doing to stay physically active? Please select all that apply.

- Walking outside
- Walking around the house
- Catching up on household chores, including cleaning and gardening
- Doing exercise videos
- Doing live exercise classes over the internet
- Exercising at home on my own
- Stretching or mind/body practices
- Exercising on my own at a gym, health club, or community center
- Attending live exercise classes at a gym, health club, or community center
- Attending live exercise classes in my community not in a gym or community center
- Other (Please Specify)



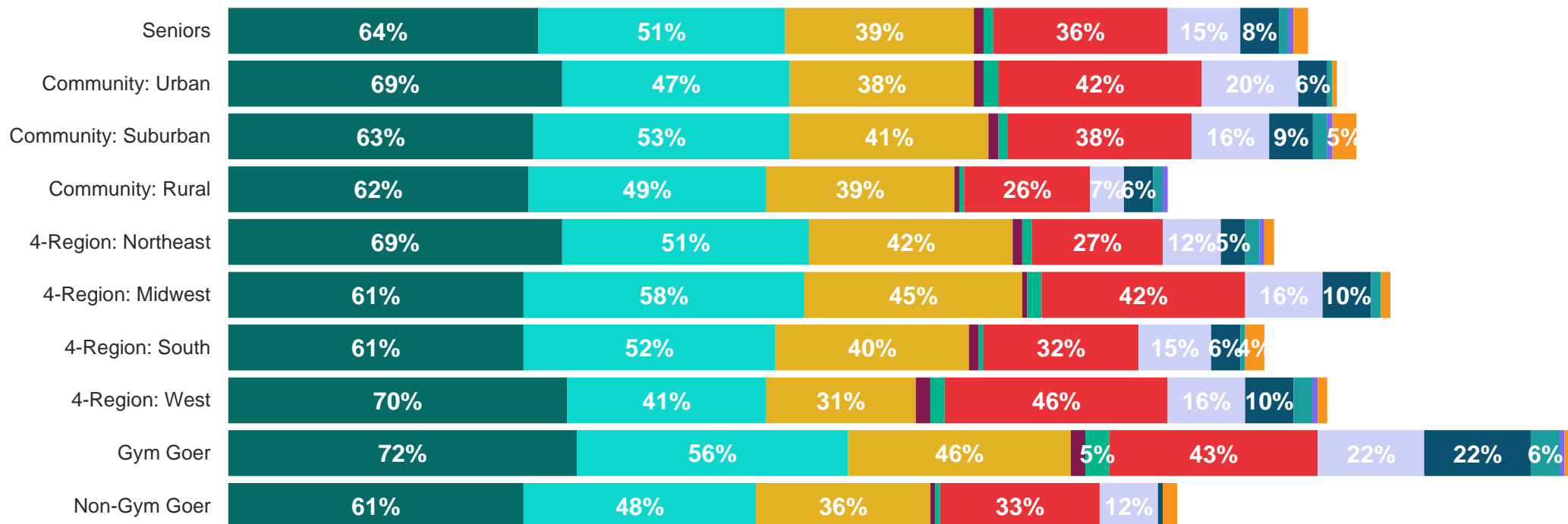
Data labels <4% not shown.
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PHYSICAL ACTIVITY DURING COVID-19

(Cont.) Western Seniors are more likely to stay physically active by walking outside compared to other regions.

What are you currently doing to stay physically active? Please select all that apply.

- Walking outside
- Catching up on household chores, including cleaning and gardening
- Doing live exercise classes over the internet
- Stretching or mind/body practices
- Attending live exercise classes at a gym, health club, or community center
- Other (Please Specify)
- Walking around the house
- Doing exercise videos
- Exercising at home on my own
- Exercising on my own at a gym, health club, or community center
- Attending live exercise classes in my community not in a gym or community center



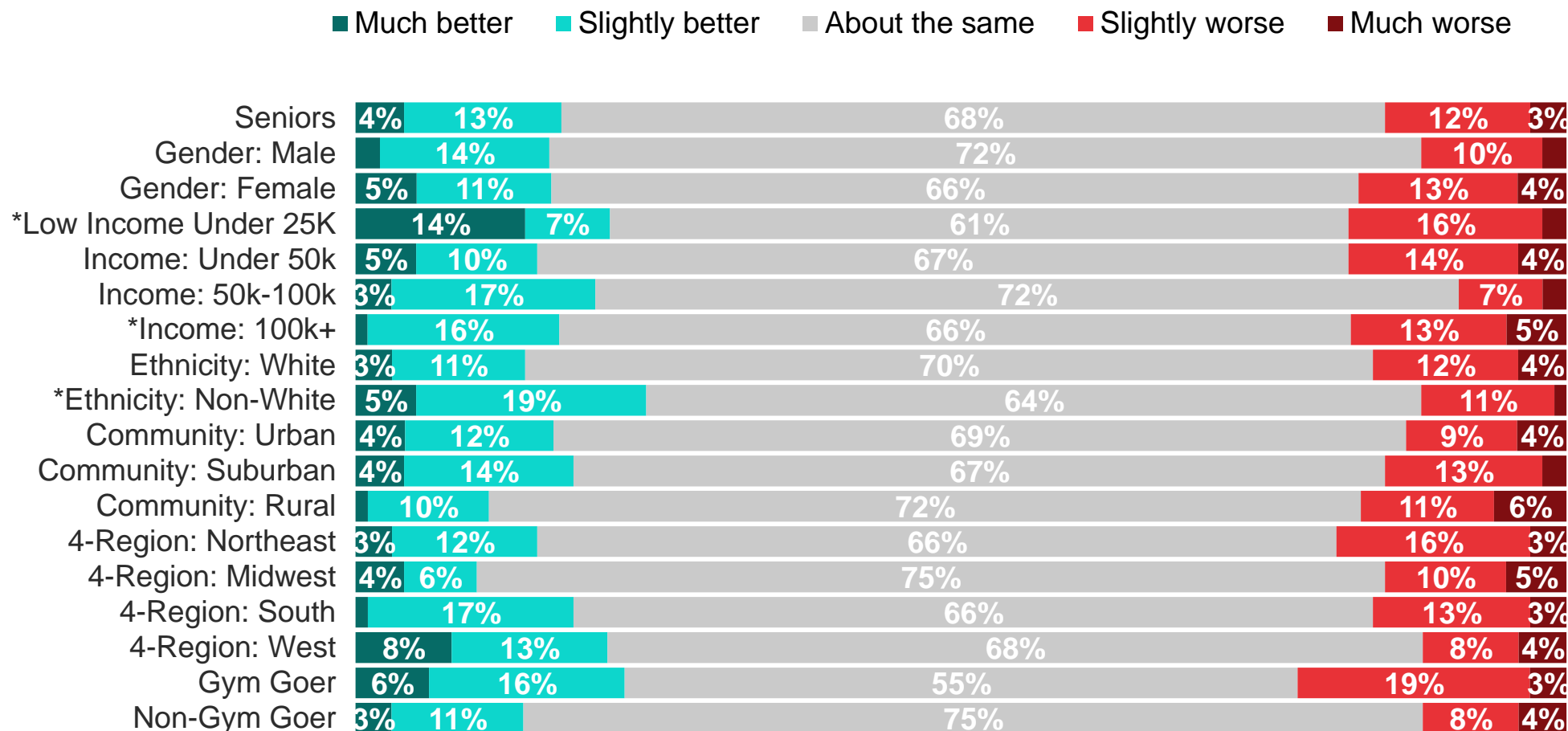
Data labels <4% not shown.

*Data should be treated directionally due to small sample size.

PHYSICAL ACTIVITY DURING COVID-19

Excluding gym goers, roughly 7-in-10 Seniors rate their physical activity as “about the same” compared to the start of the pandemic.

How would you rate your level of physical activity now compared to the beginning of COVID-19? Please select one.



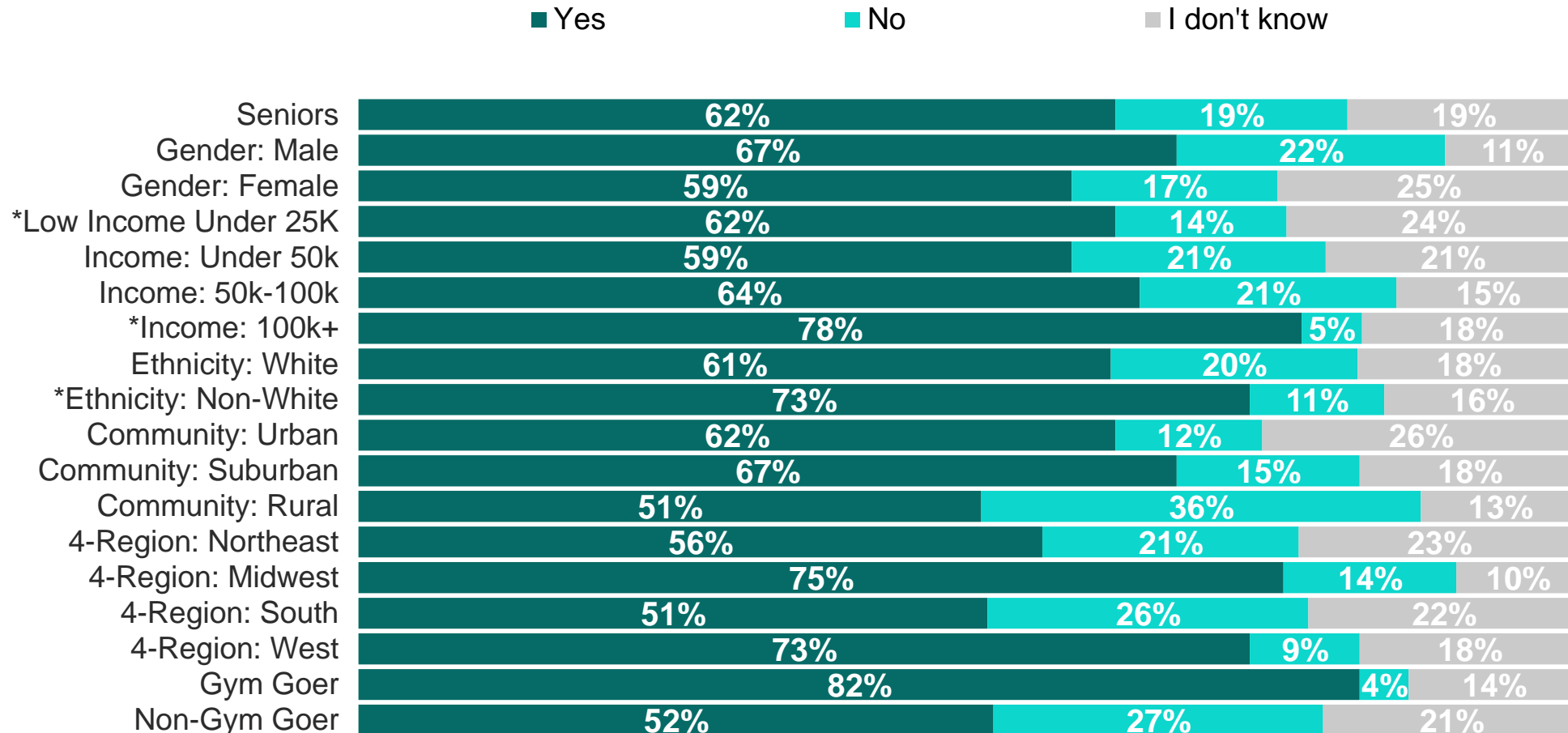
Data labels <3% not shown.

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PHYSICAL ACTIVITY IN THE NEXT 3 MONTHS

Half of Seniors who don't typically go to the gym have plans to exercise in the next 3 months.

Do you plan to exercise in the next 3 months?



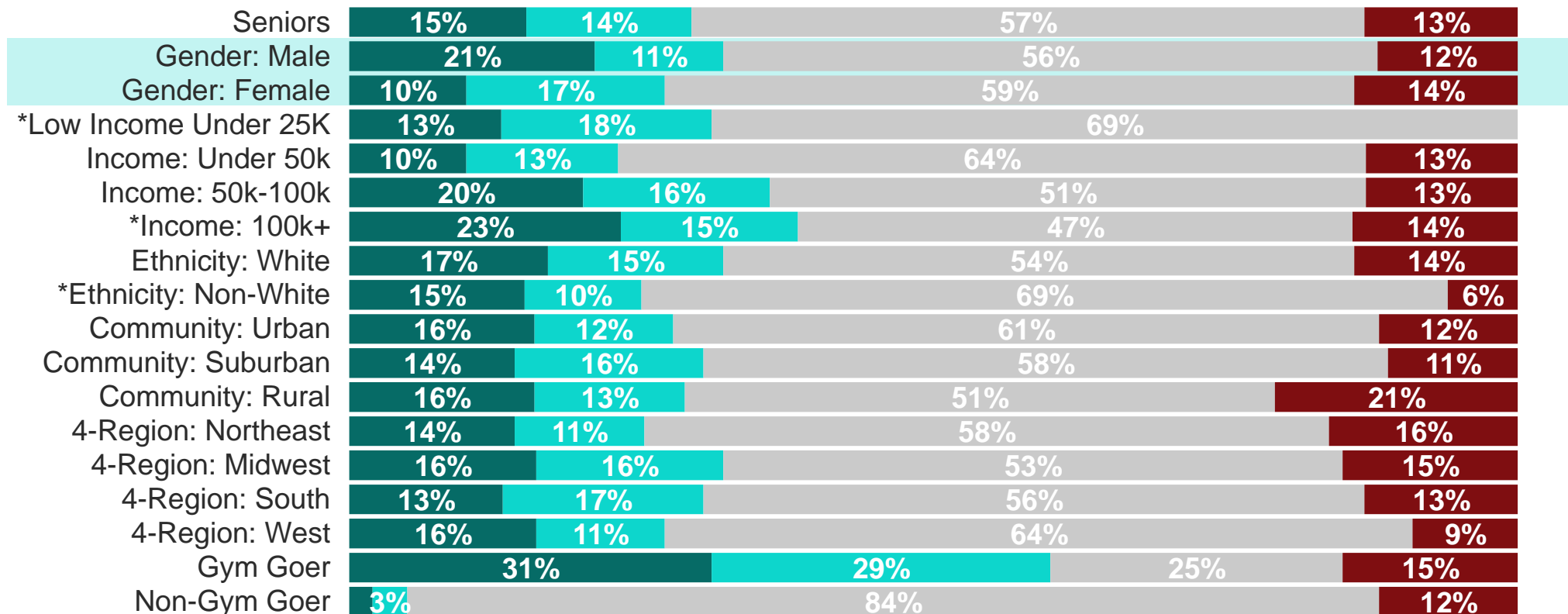
*Data should be treated directionally due to small sample size.

RETURN TO THE GYM

Male Seniors are twice as likely as female Seniors to say they've already returned to the gym.

Do you plan to return to your fitness center/gym once it is deemed safe and measures are put in place?

■ Yes, I have already returned ■ Yes, I plan to return ■ No ■ I don't know



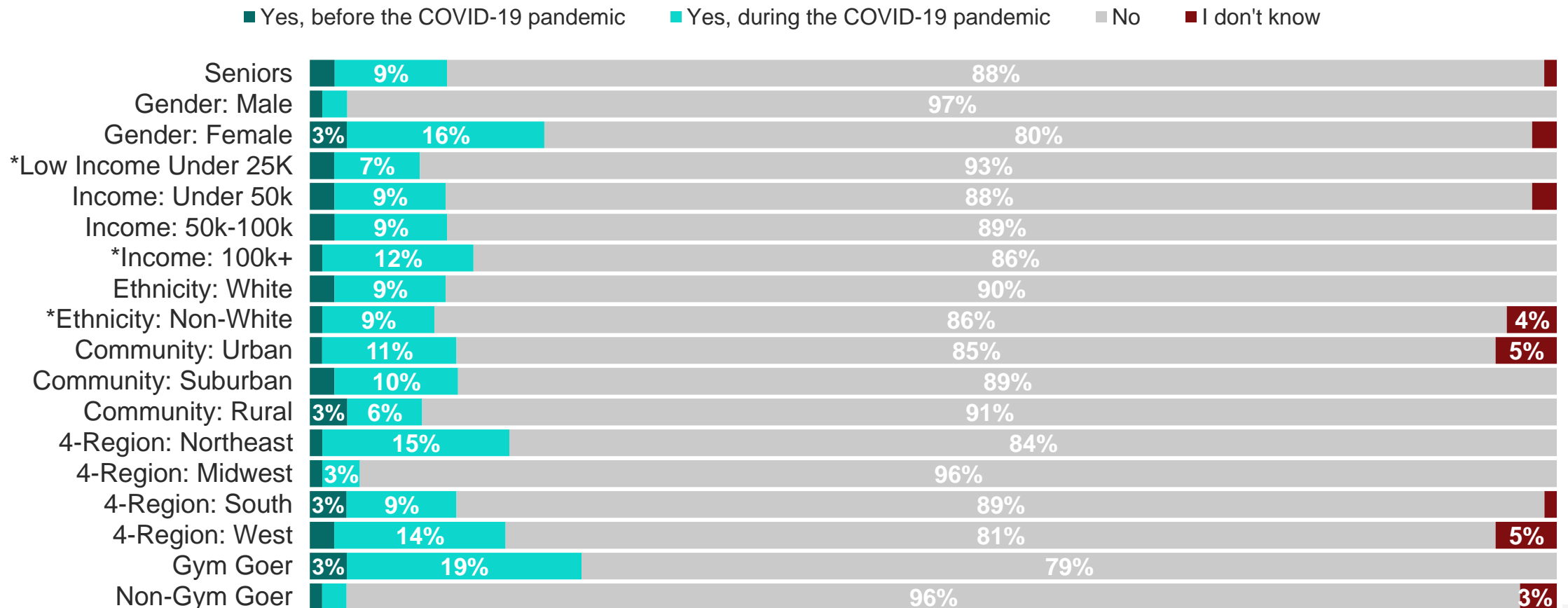
Data labels <3% not shown.

*Data should be treated directionally due to small sample size.

VIRTUAL / DIGITAL FITNESS SOLUTIONS

Across all demo groups, at least 3-in-4 Seniors have not used any virtual fitness solutions.

Have you participated in any virtual/digital fitness solutions (ex: live virtual classes, on-demand classes online, programming on mobile apps)? Please select all that apply.



Data labels <3% not shown.
 *Data should be treated directionally due to small sample size.

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FOOD INSECURITY

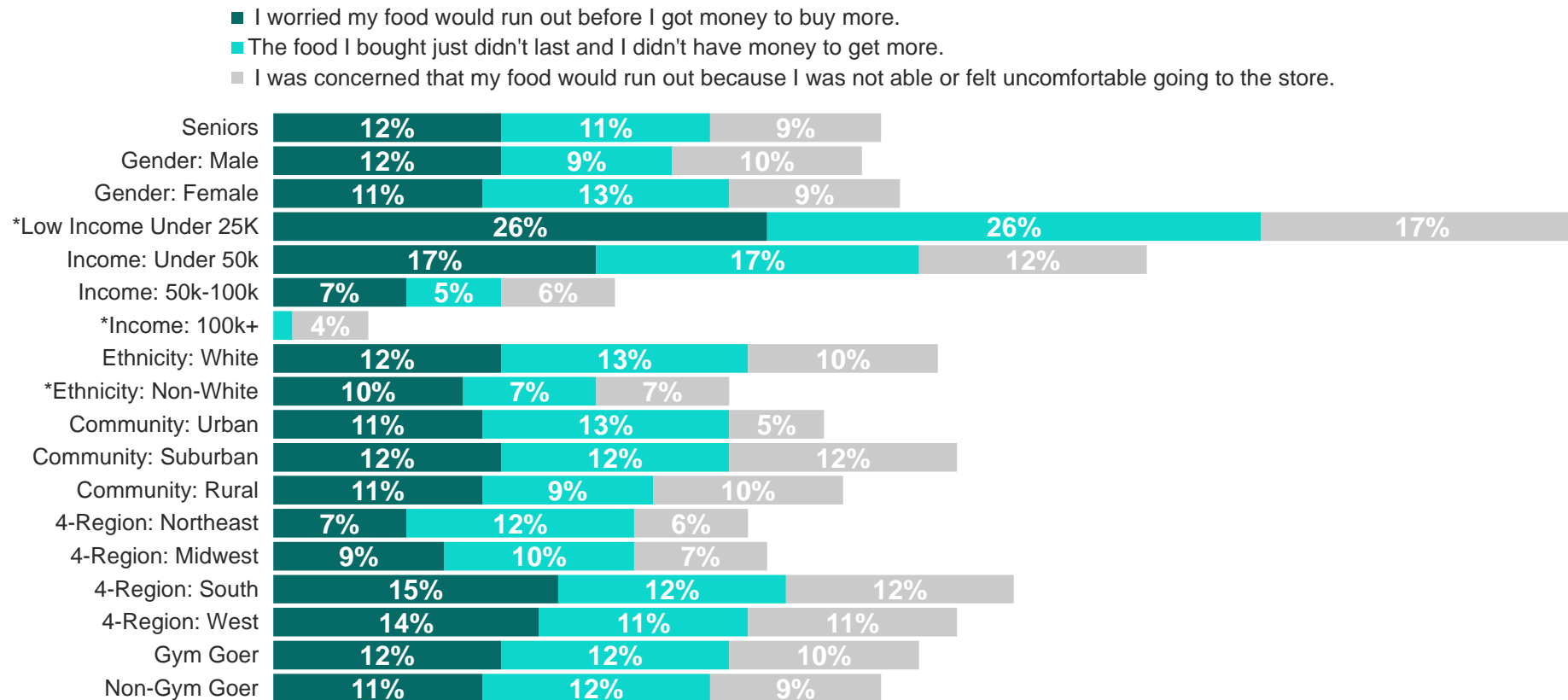
In the last thirty days, southern Seniors are most likely out of any region to experience food insecurity.

Within the past 30 days, I worried my food would run out before I got money to buy more.' Was that often true, sometimes true, or never true for you?

Within the past 30 days, the food I bought just didn't last and I didn't have money to get more.' Was that often true, sometimes true, or never true for you?

Within the past 30 days, I was concerned that my food would run out because I was not able or felt uncomfortable going to the store.' Was that often true, sometimes true, or never true for you?

Showing Often True + Sometimes True



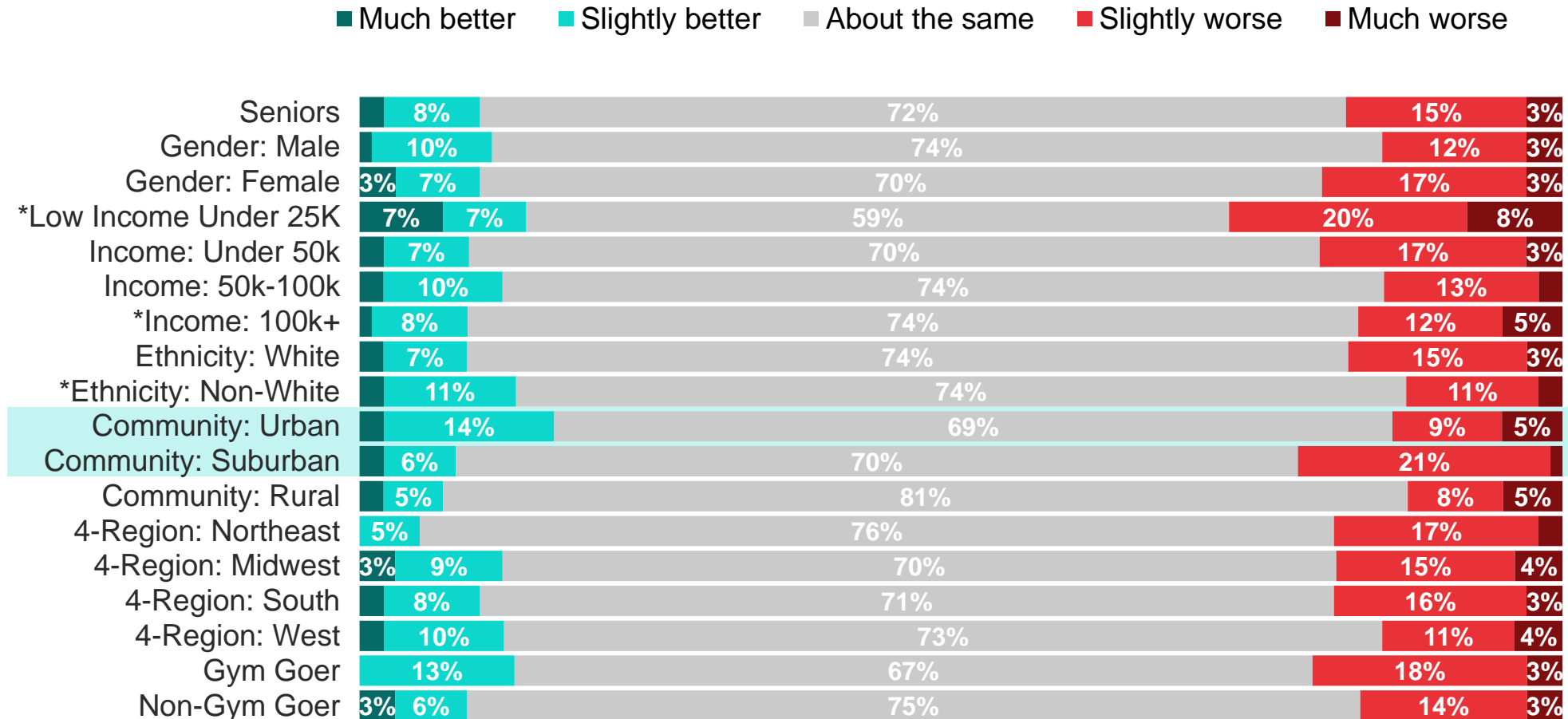
Data labels <2% not shown.

*Data should be treated directionally due to small sample size.

EATING HABITS DURING COVID-19

69% of urban Seniors rate their eating habits as “about the same” since the start of the pandemic compared to 81% of rural Seniors.

How would you rate your eating habits now compared to more than a year ago at the beginning of COVID-19?



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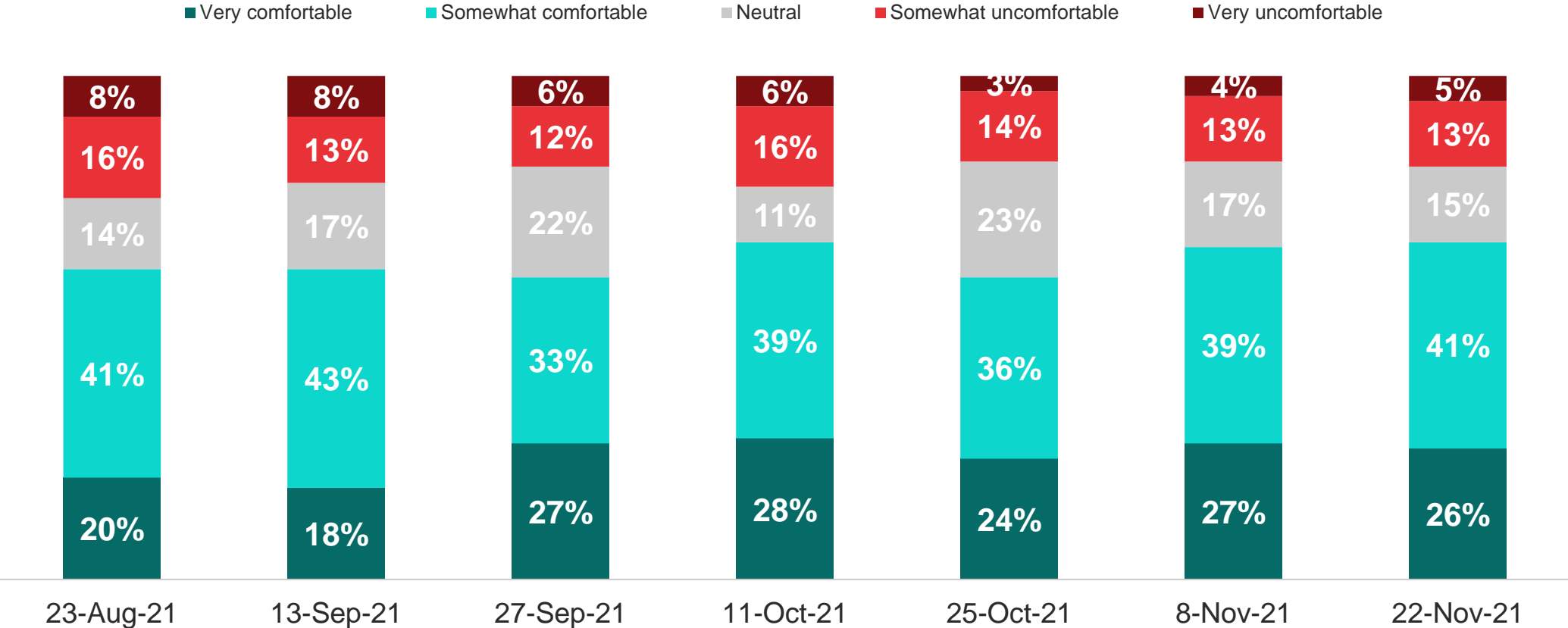
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SOCIALIZING DURING COVID-19

Roughly 2-in-3 Seniors (67%) feel comfortable socializing with friends/family in public places.

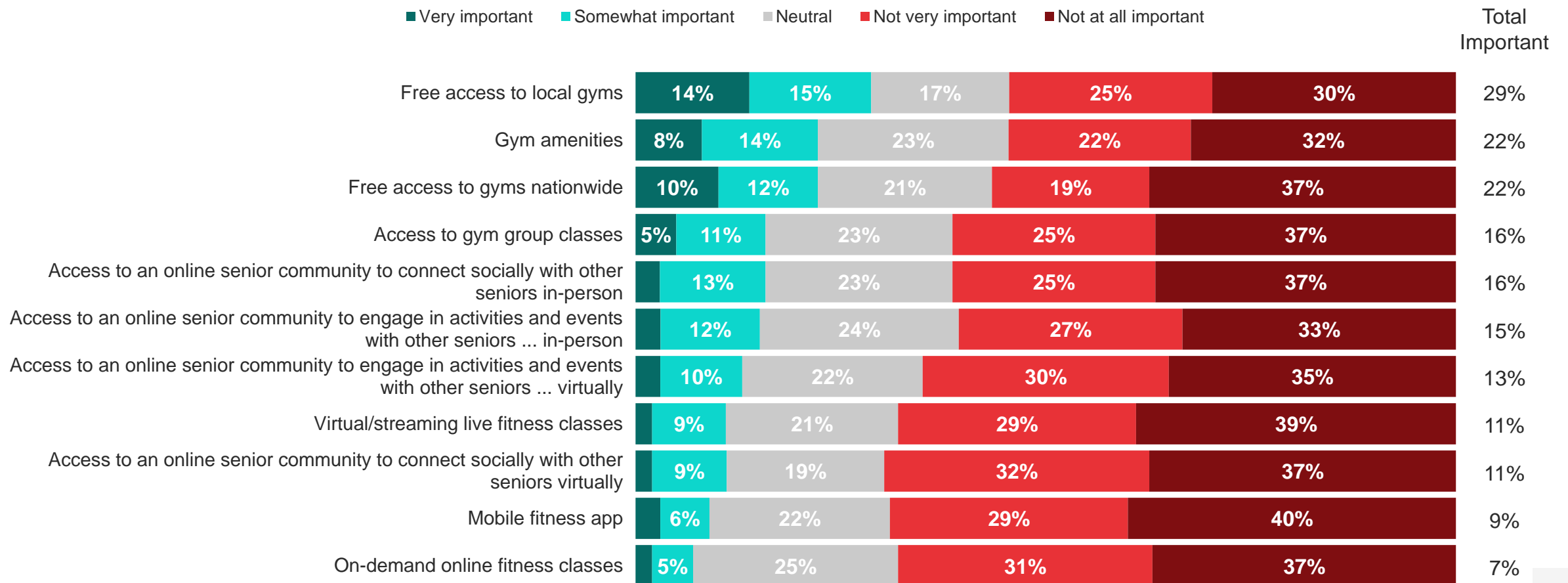
How comfortable are you socializing with friends / family in public places right now?



MEDICARE ADVANTAGE PLAN BENEFITS

29% of Seniors said that having free access to local gyms is the most important benefit of participating in a Medicare Advantage plan.

How important are each of the following features / benefits of participating in a Medicare Advantage plan to you?

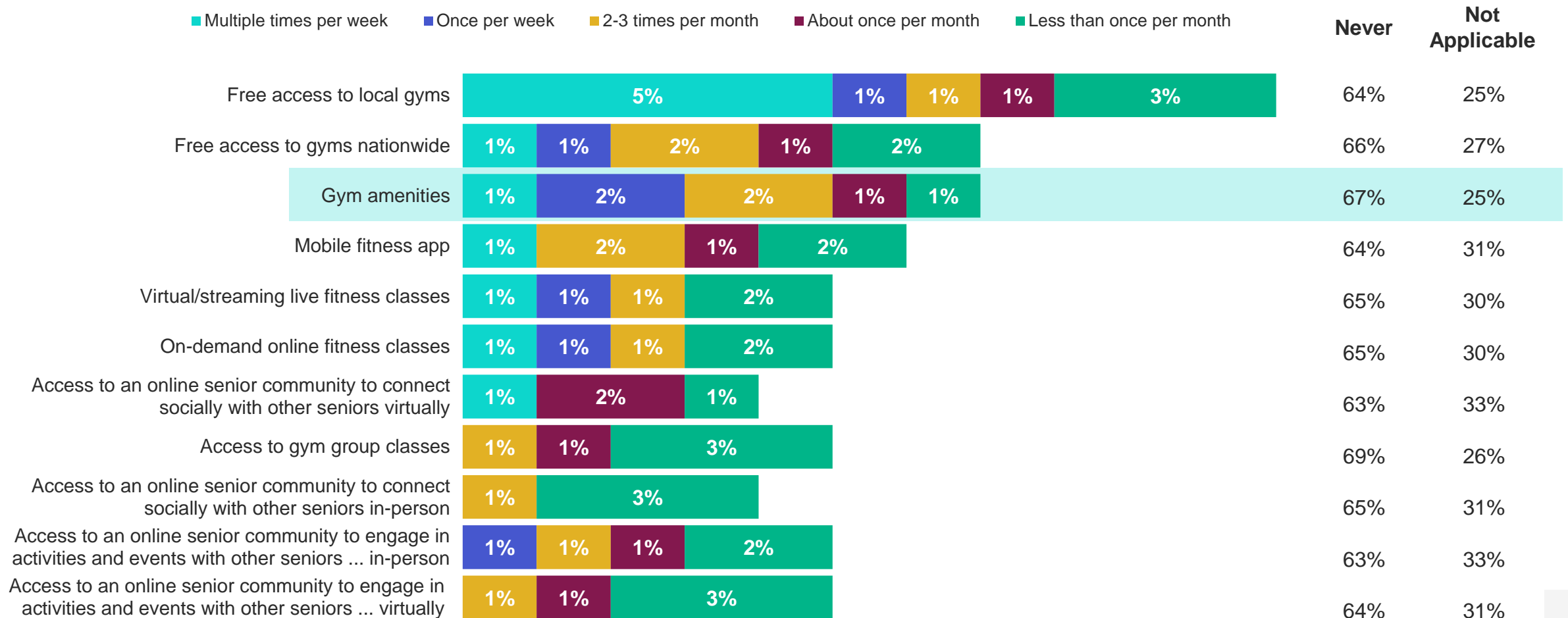


Data labels <4% not shown.

MEDICARE ADVANTAGE PLAN BENEFITS

67% of Seniors that were offered gym amenities as part of their plan have not used them in the last three months.

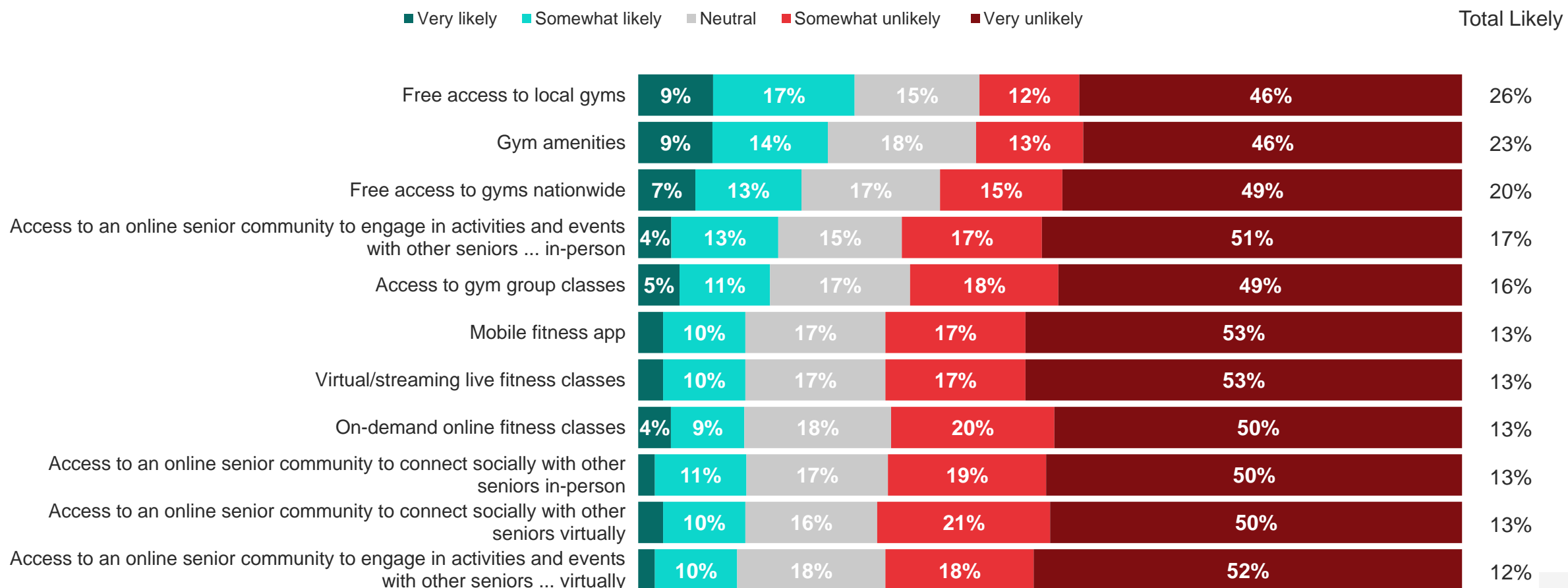
How frequently have you used the following if offered by your Medicare Advantage plan in the last 3 months?



MEDICARE ADVANTAGE PLAN BENEFITS

A quarter of Seniors (26%) are likely to use free access to local gyms if offered by their Medicare Advantage plan in 2022.

How likely will you be to use the following if offered by your Medicare Advantage plan in 2022 at no cost to you?

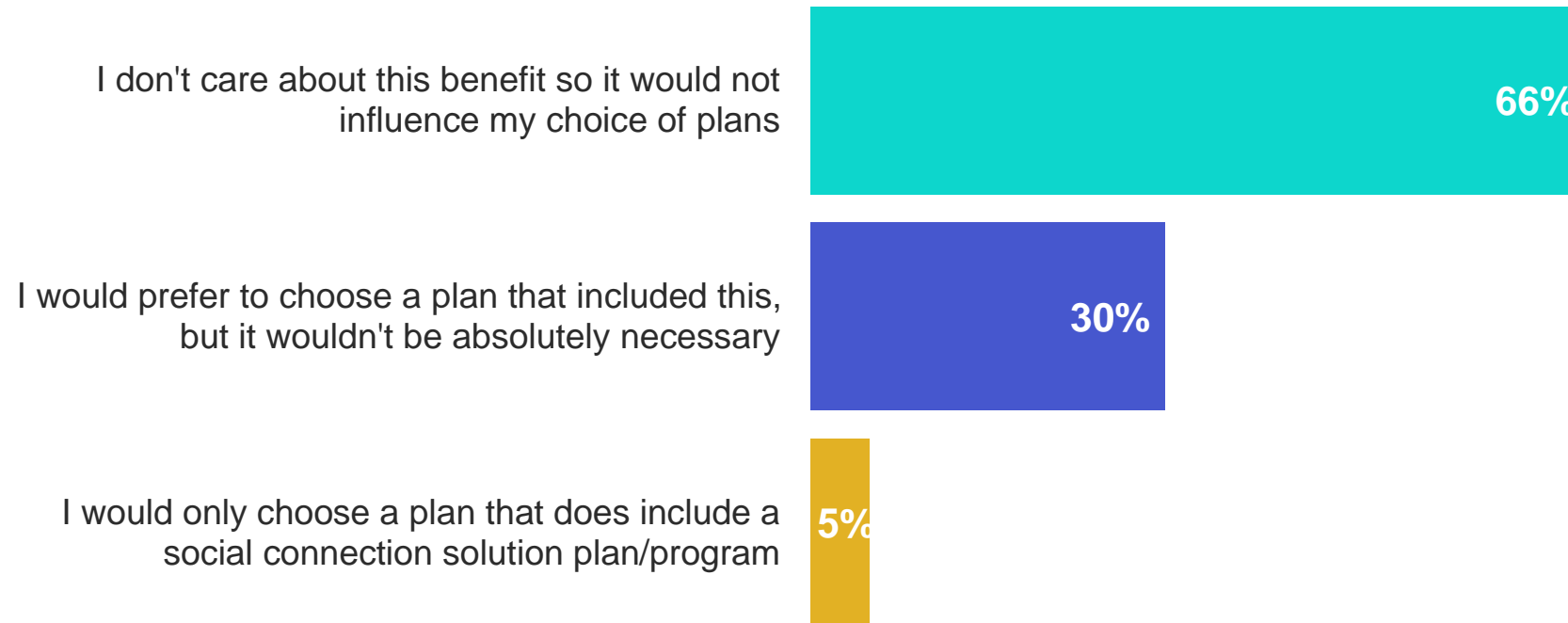


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MEDICARE ADVANTAGE PLAN BENEFITS

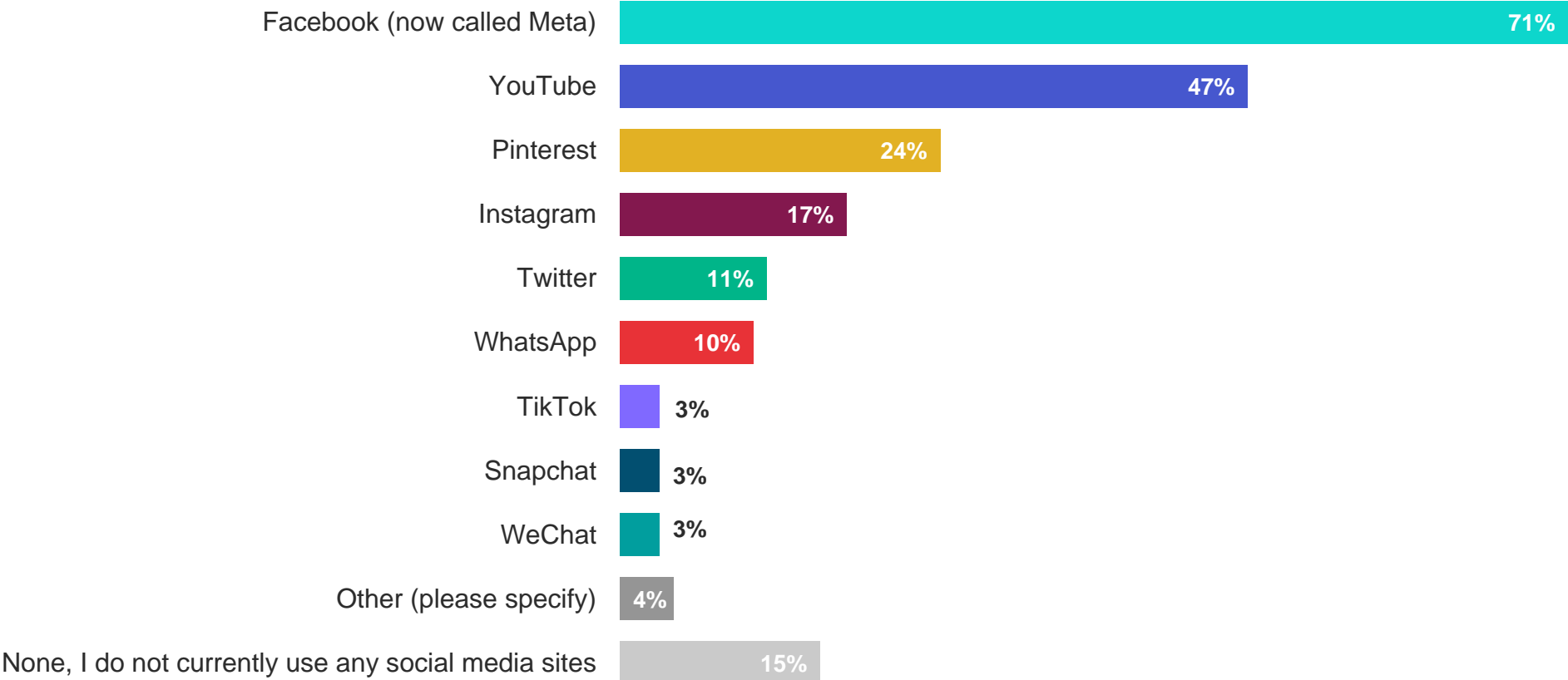
66% of Seniors do not care about having a social connection solution program as part of their Medicare Advantage plan.

Overall, how important is it to you that your Medicare Advantage plan includes a social connection solution plan or program, that is, access to an online senior community?



Seniors are primarily using Facebook and YouTube for social media purposes.

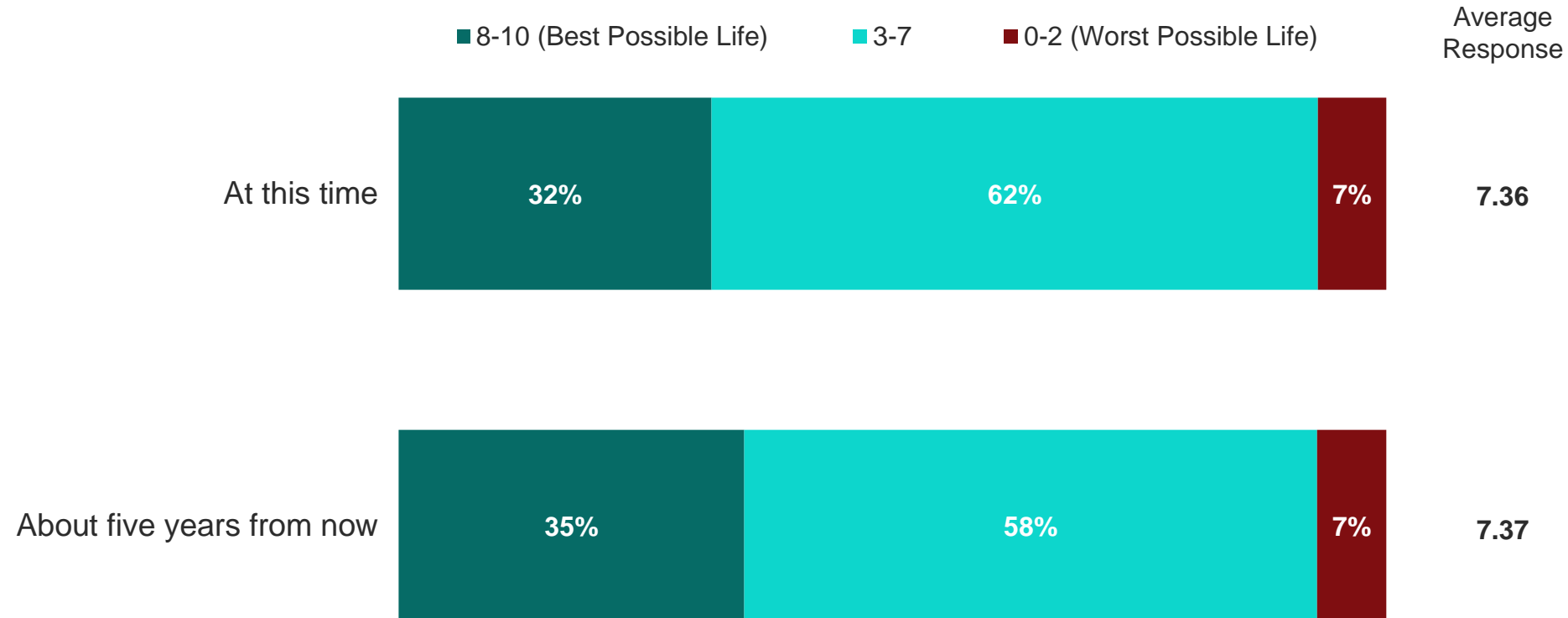
What popular social media sites are you currently using today? Please select all that apply.



LIFE RATINGS

On a 10-point scale, Seniors rate their quality of life for both “at this time” and “about five years from now” an average of 7.

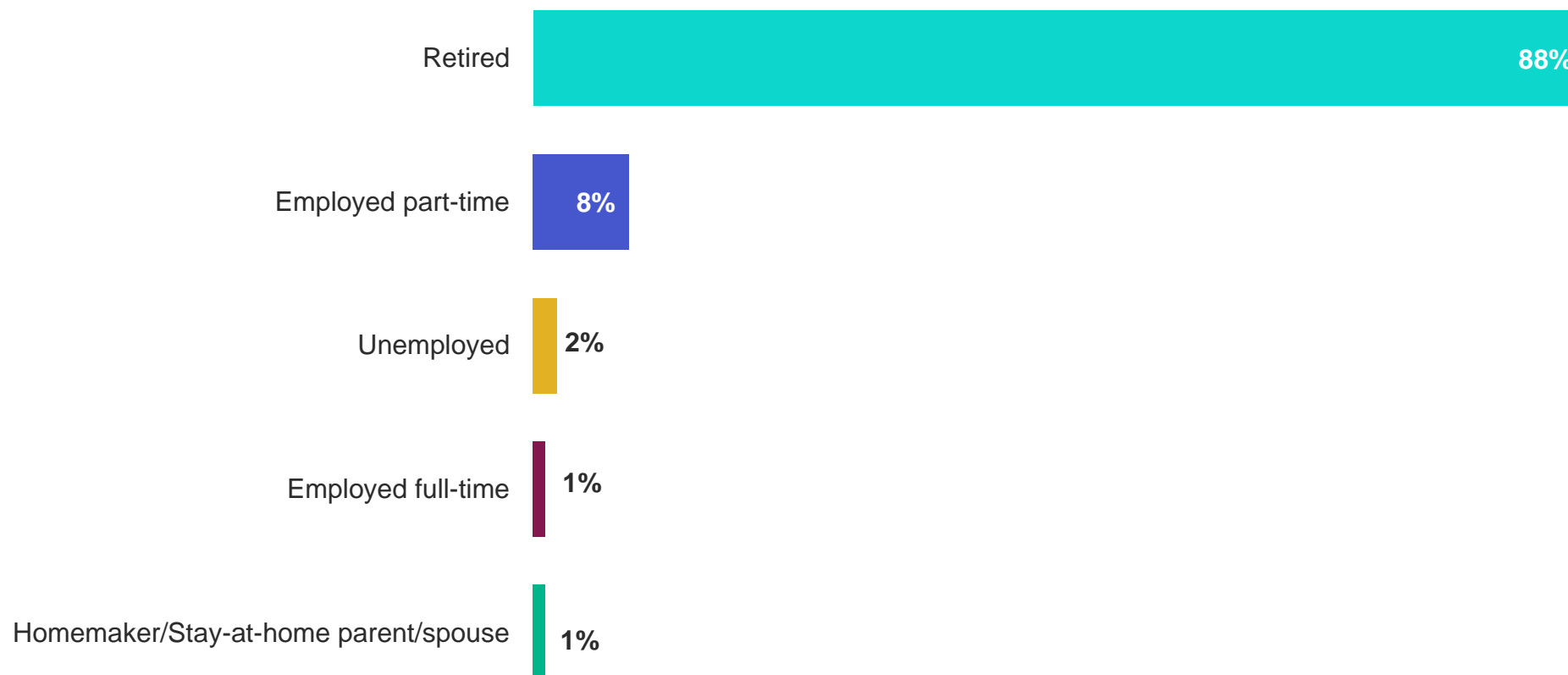
Please imagine a ladder with steps numbered from zero at the bottom to 10 at the top. The top of the ladder (10) represents the best possible life for you and the bottom of the ladder (0) represents the worst possible life for you. On which step of the ladder would you say you personally feel you stand at this time, and on which do you think you will stand about five years from now?



EMPLOYMENT

The majority of Seniors describe themselves as being retired (88%).

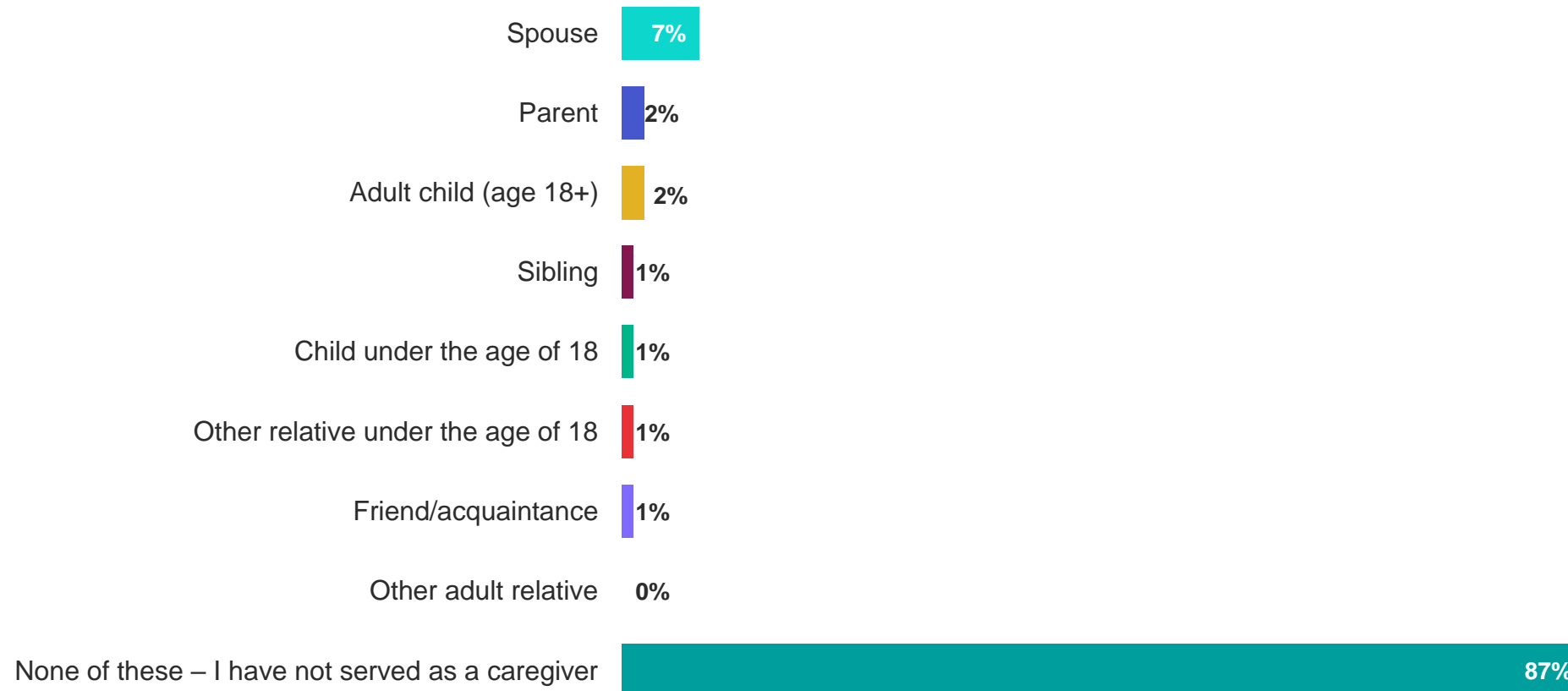
Which of the following best describes you?



CAREGIVING

Most Seniors (87%) have not served as a caregiver in the last 12 months.

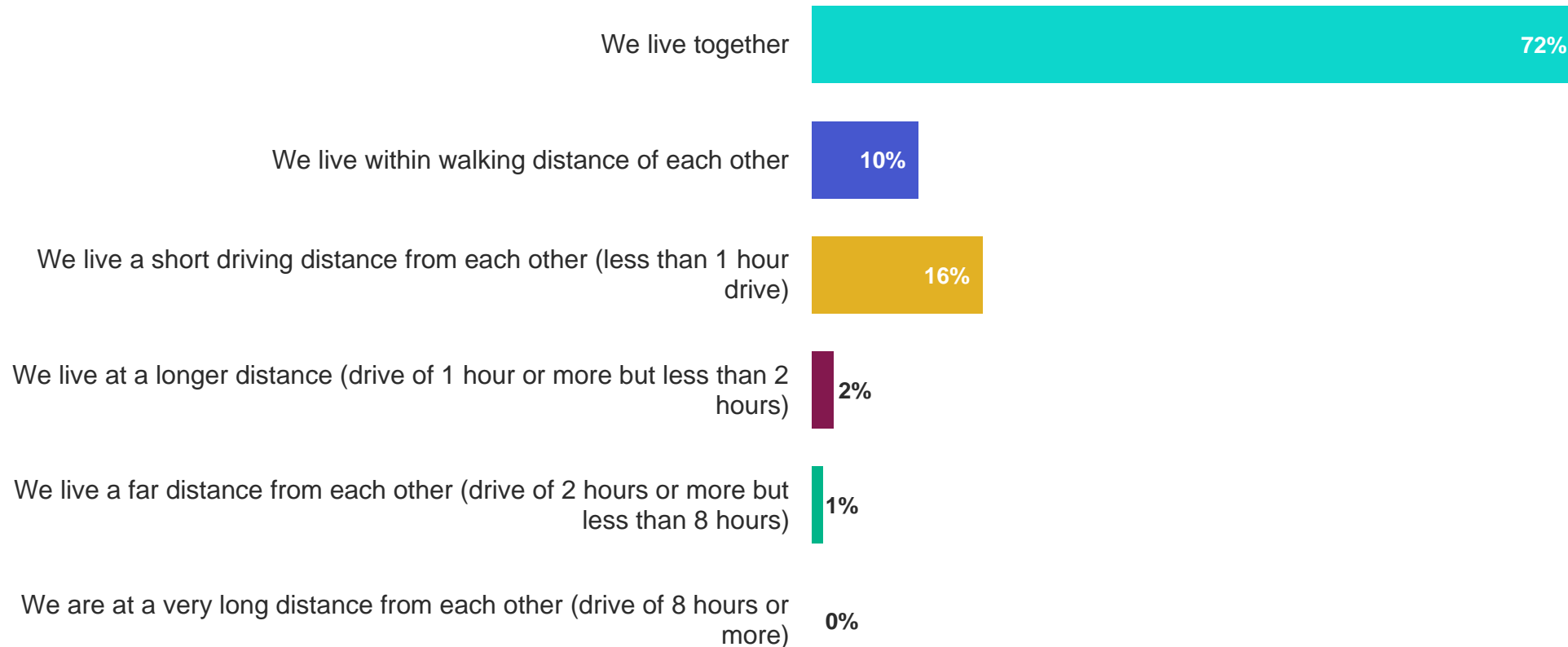
By this definition, in the last 12 months, have you provided care or are you currently providing care to any of the following? Please select all that apply.



72% of Senior caregivers live with their care recipient.

Please indicate which of the following best describes the current living arrangement between you and your care recipient.

**Among Seniors Who Served as a Caregiver*



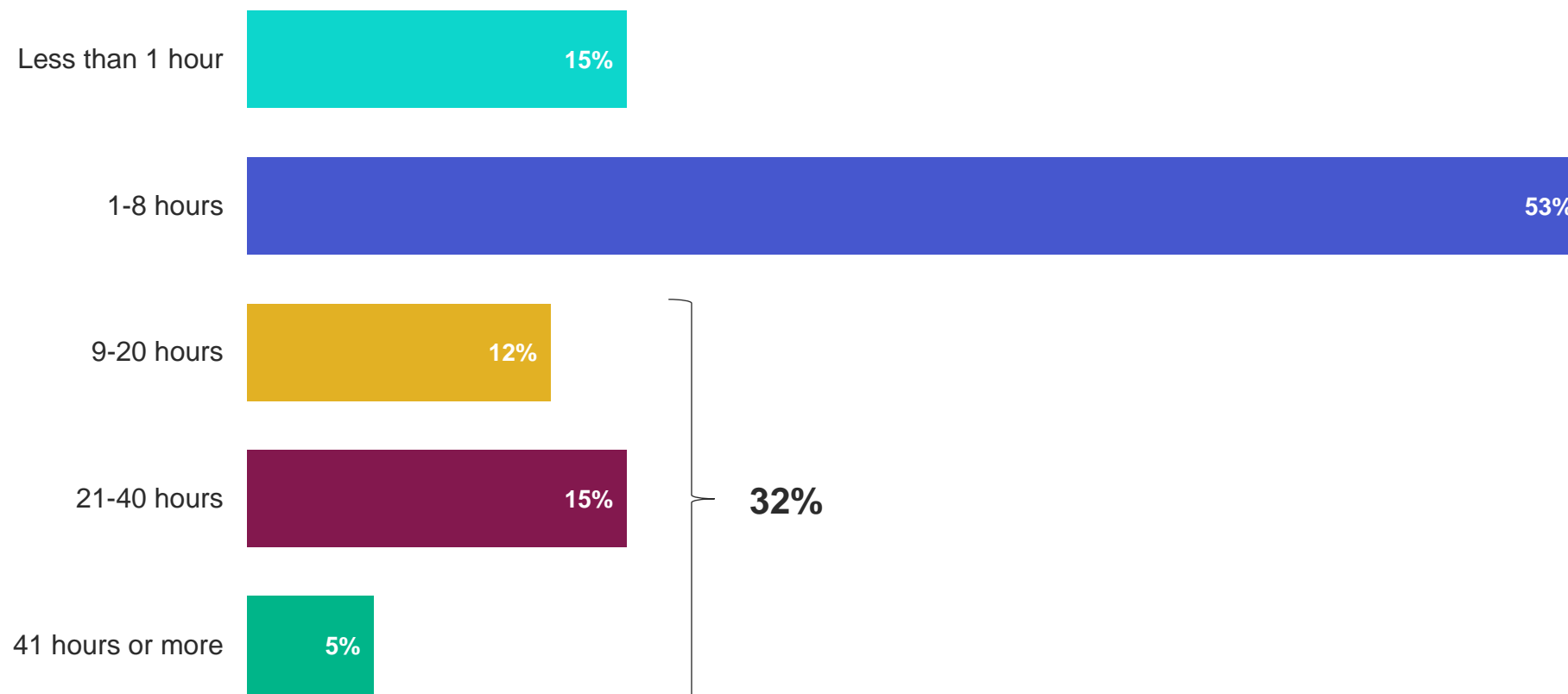
**Data should be treated directionally due to small sample size.*

CAREGIVING

Most caregivers spend 8 hours or less providing care, but 32% spend between 9 and 41+.

Thinking now of all the kinds of help you provide for your care recipient(s), about how many hours do you spend in an average week helping them?

**Among Seniors Who Served as a Caregiver*



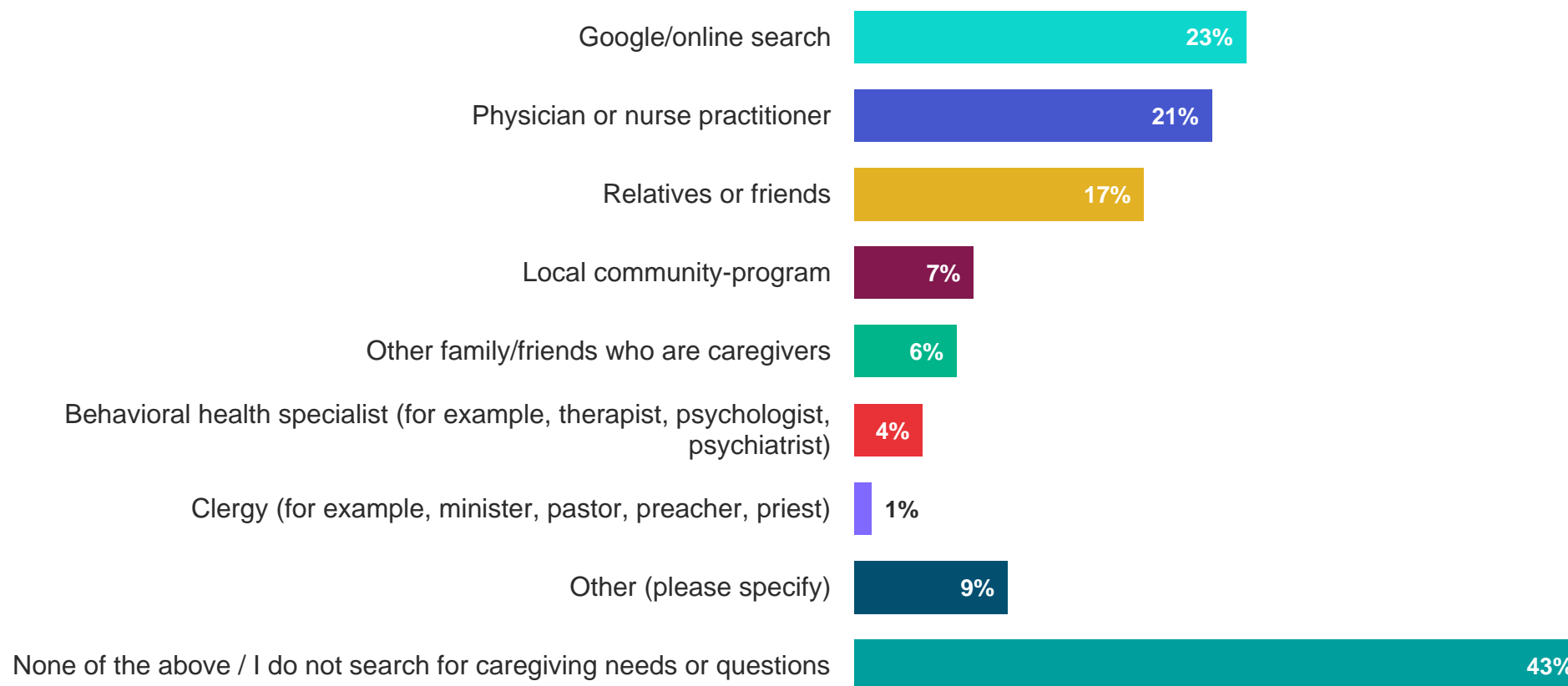
**Data should be treated directionally due to small sample size.*

CAREGIVING

43% of caregiving Seniors do not search for caregiving needs or questions.

Where do you go if you have caregiving needs or questions? Please select all that apply.

**Among Seniors Who Served as a Caregiver*



**Data should be treated directionally due to small sample size.*





PROJECT LEADERSHIP

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