



SilverSneakers Pulse

Quarter 4, 2022

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Tivity Health Consumer Research

December 2022



Key Findings

Fitness / Physical activity

- 93% of SSF members currently participate in physical activity. A similar number, (95%) plan to exercise in the next three months.
 - A higher proportion of members are currently engaged in gym activities than earlier this year
- More than half, (56%) currently belong to a gym that offers SilverSneakers, mostly using cardio and weight equipment and attending fitness classes
- Just over half, (53%) report participating in a SilverSneakers digital offering in the last 3 months and 89% plan to continue in the future, with four in ten planning to participate in both in-person and digital classes.

Nutrition

- Eating habits remain similar as earlier this year with a higher proportion of members report better eating habits, (36%), than worse eating habits, (7%) compared to three months ago.
- About one in eight members, (13%) are concerned about their own food security

Social Connection

- A similar proportion of members are classified as lonely compared to three months ago, while most members continue to engage with friends and family digitally

COVID-19 Perceptions & attitudes

- Members continue to be less concerned about a COVID-19 outbreak and are more comfortable socializing in public places, compared to earlier in the year

Objectives & Methodology



Survey via SilverSneakers
Newsletter



698 total responses
received



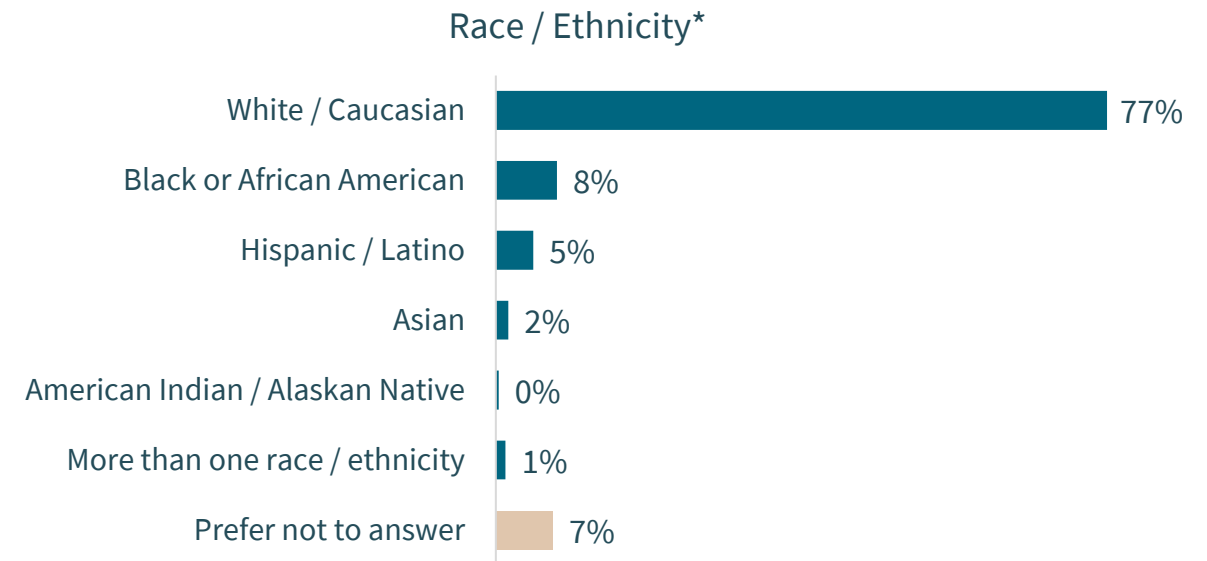
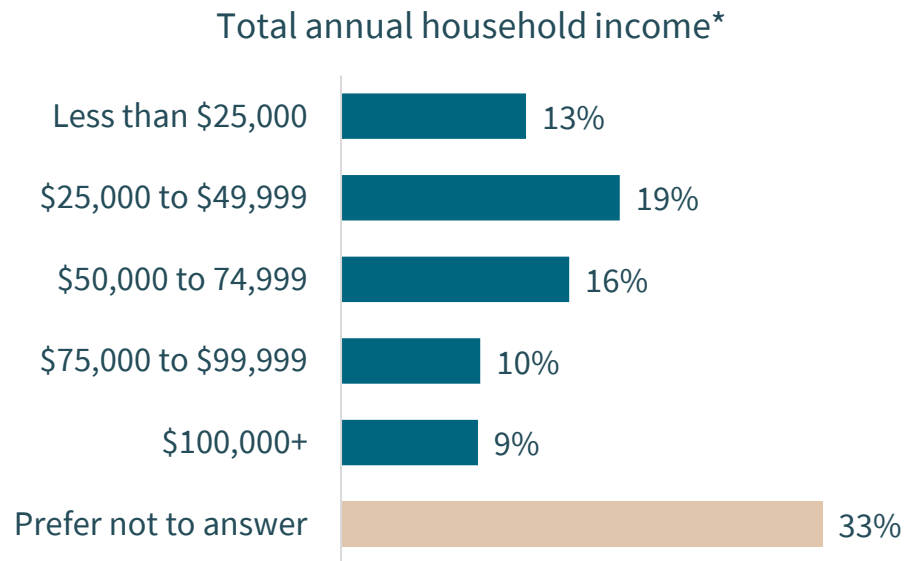
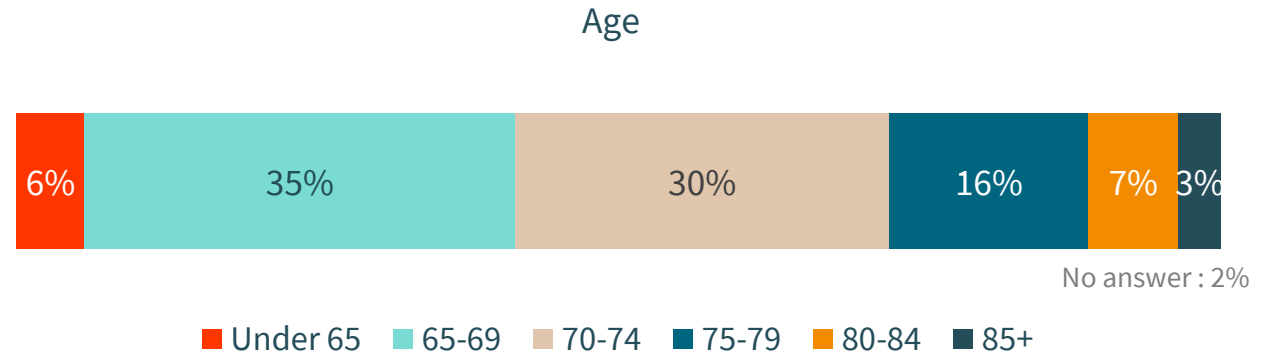
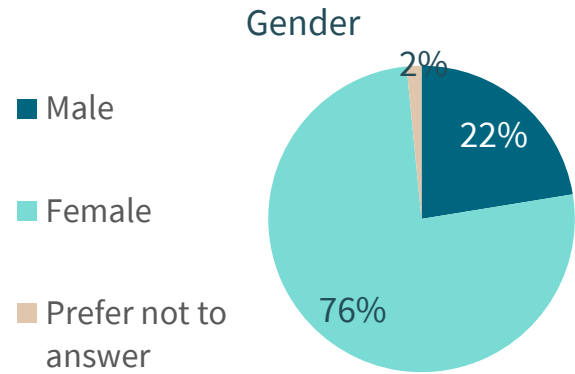
Fieldwork period:
November 16th – 23rd, 2022

Objectives

Understand SilverSneakers members' experiences regarding overall health, physical activity, nutrition and social engagement. Specifically:

- Current exercise habits
- Current and perceived future digital fitness consumption
- Current nutrition habits
- Food insecurity perceptions
- Impact of COVID-19 on daily life
- Social connection

Respondent Profile – November 2022



Are you? Which of the following ranges best describes your age?
 For 2020, what was the total annual income for your household? Which race/ethnicity best describes you?

*Comparisons will be made across income and race where possible



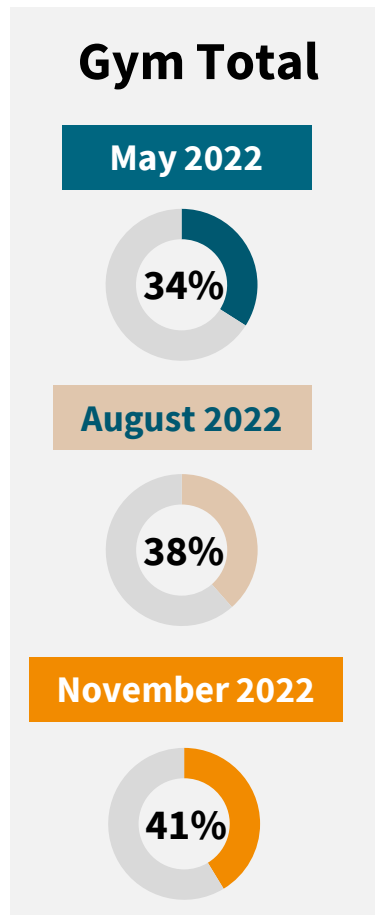
Fitness & Physical Activity

Now, let's talk about physical activity

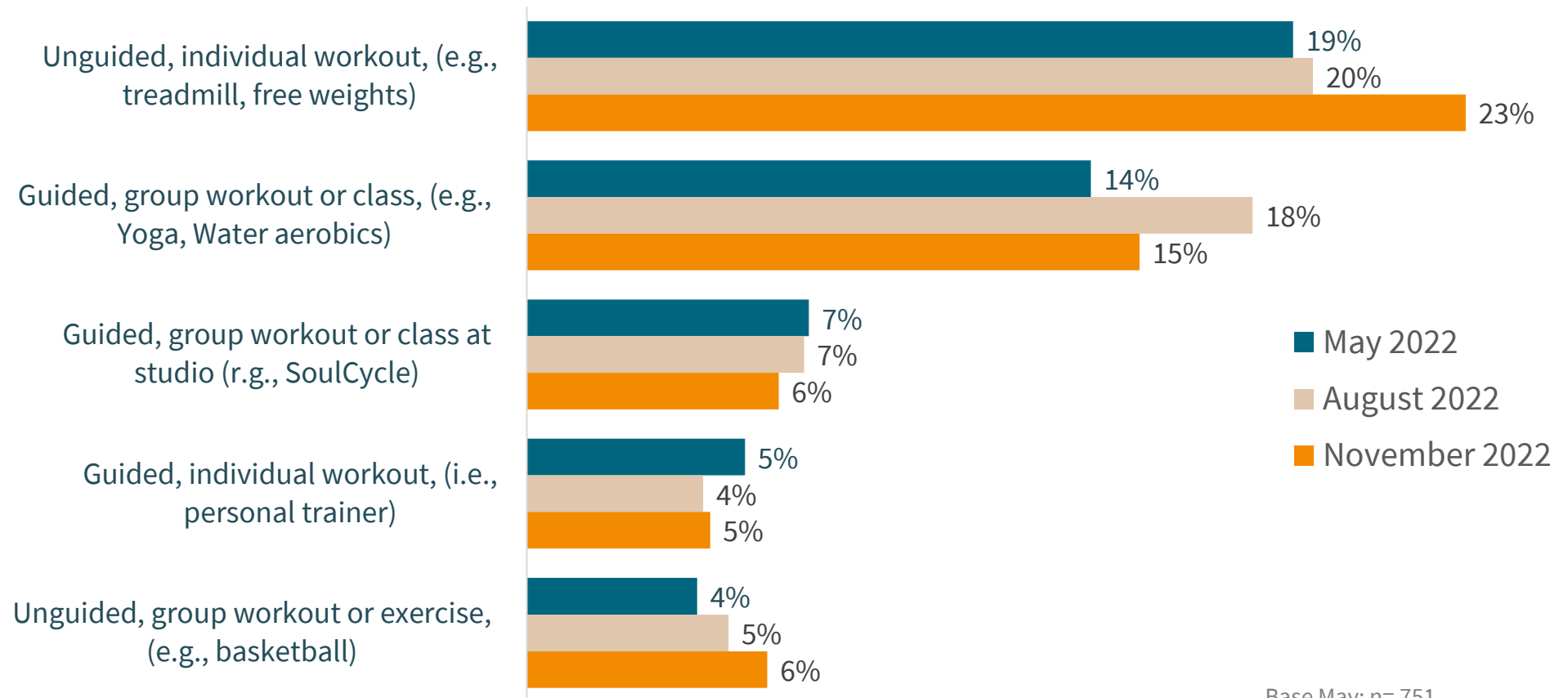


More members are currently engaged in gym activities than earlier in 2022

Working out individually or in an instructor led class remains the most popular types of gym workouts



Current physical activity - Gym



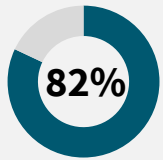
Base May: n= 751
 Base August: n= 793
 Base November: n= 698

Q1: Please indicate which, if any, of the following **physical activities** you are currently participating in?

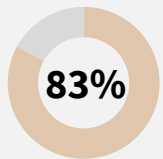
More than four out of five members continue to be physically active at home, primarily engaging in domestic chores

Home Total

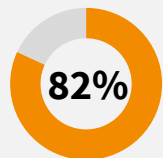
May 2022



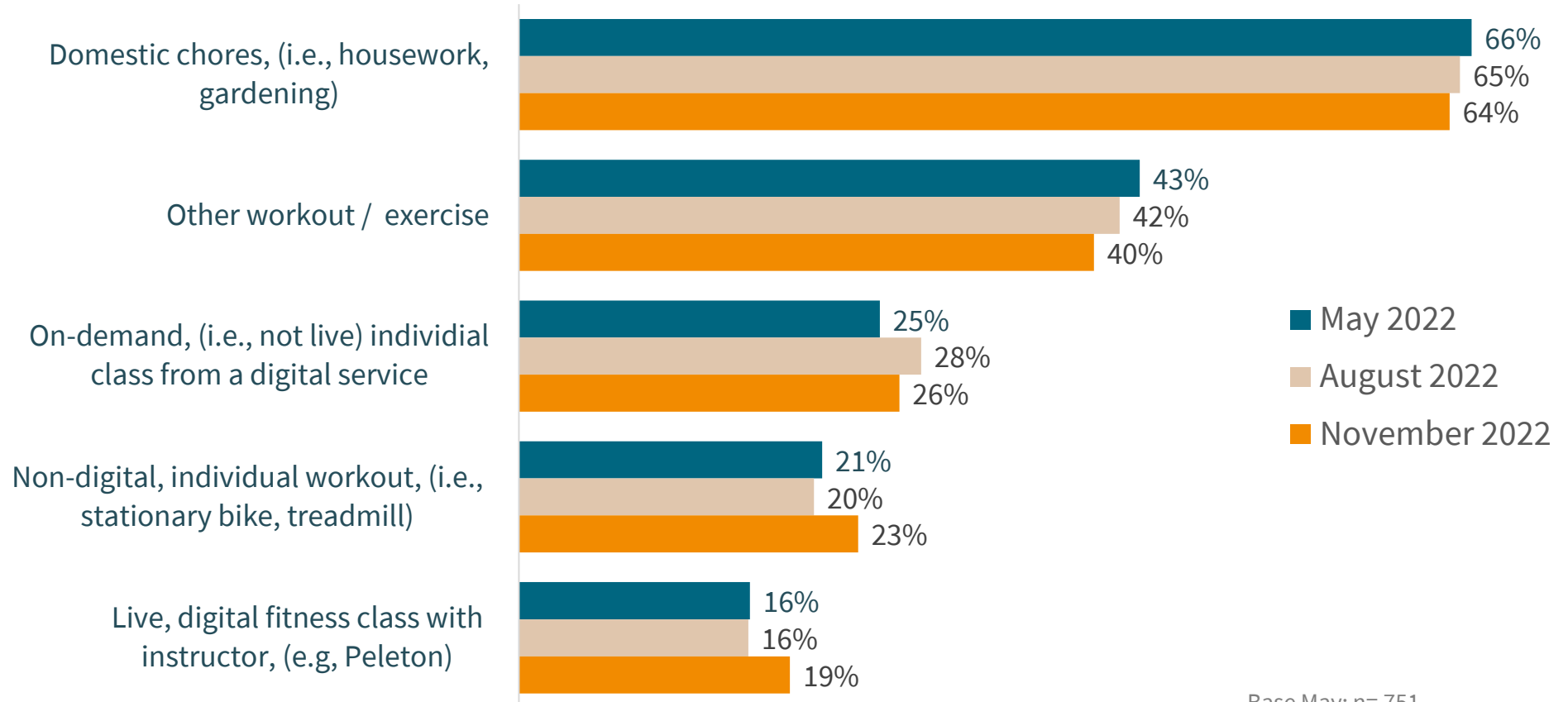
August 2022



November 2022



Current physical activity - Home

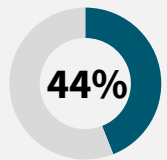


Base May: n= 751
 Base August: n= 793
 Base November: n= 698

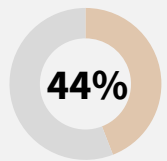
The same number of members, (44%) are participating in outdoor type activities compared to six months ago

Community Total

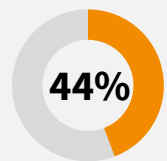
May 2022



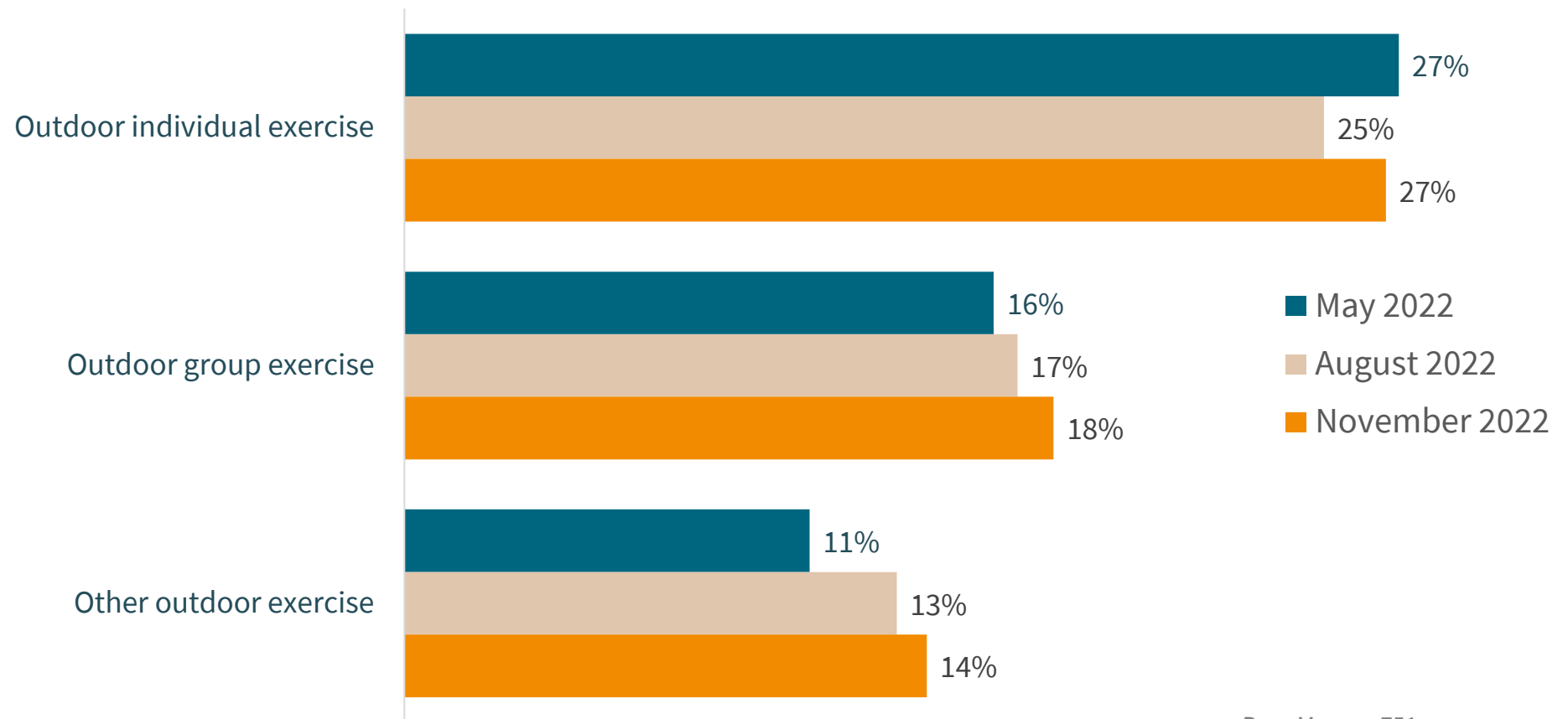
August 2022



November 2022



Current physical activity - Community



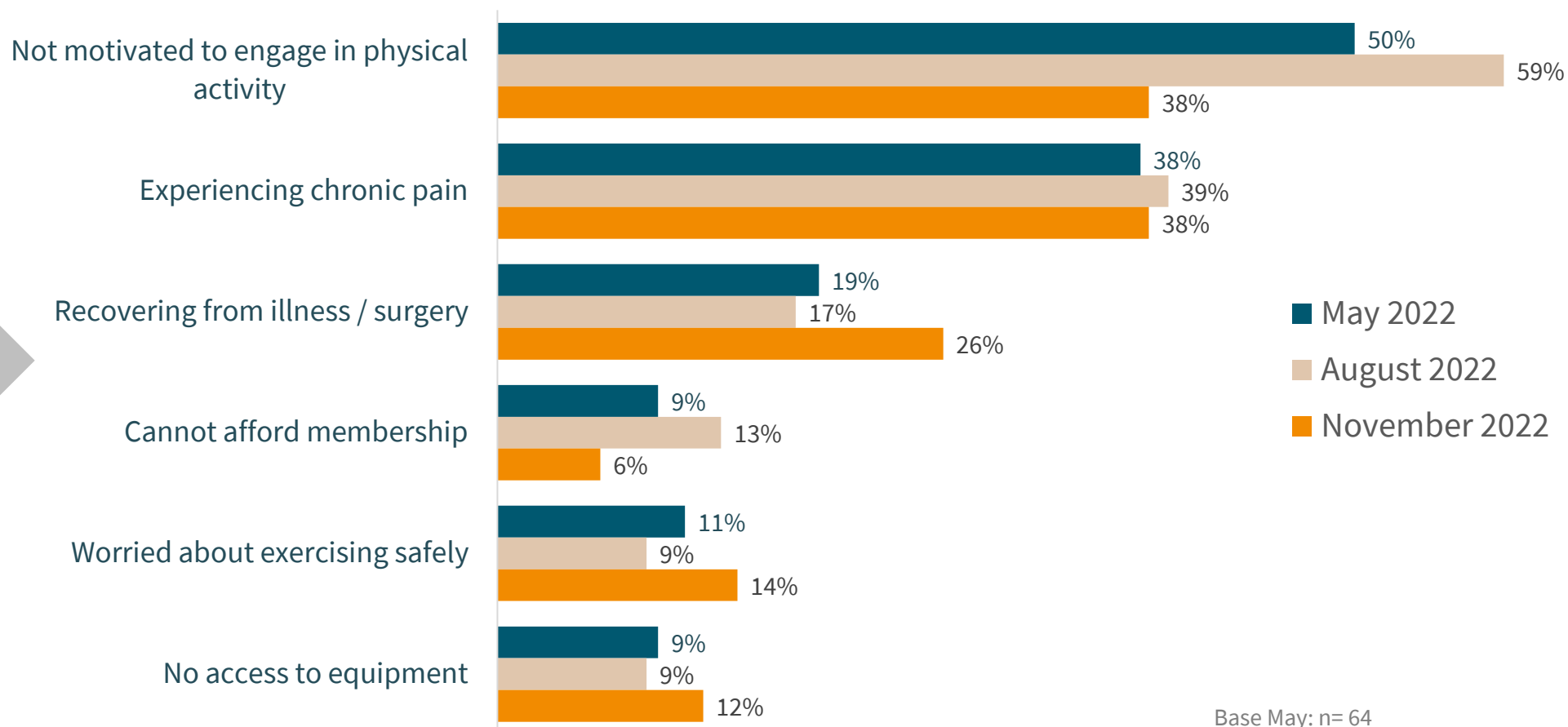
Base May: n= 751
 Base August: n= 793
 Base November: n = 698

Q1: Please indicate which, if any, of the following **physical activities** you are currently participating in?

Lack of motivation and chronic pain remain the most prominent reasons for physical inactivity



Main reasons for no physical activity*



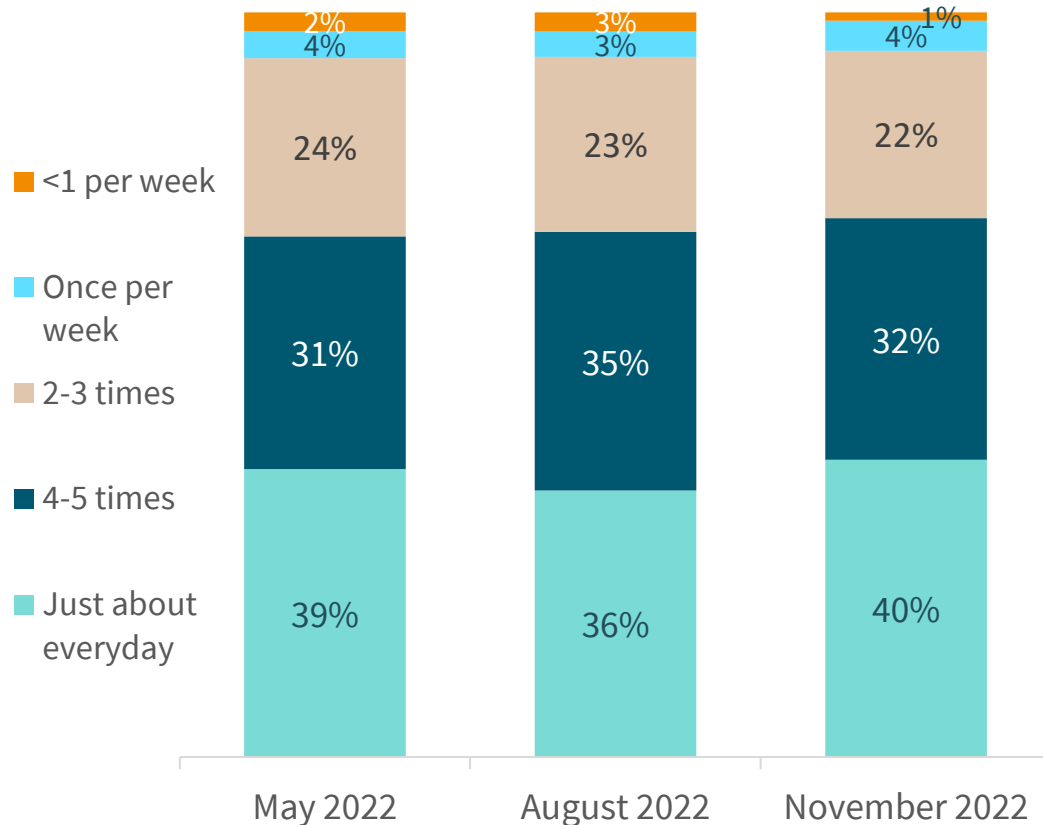
Base May: n= 64
 Base August: n= 46
 Base November: n= 50

* Caution: Results should be treated directionally due to small base size

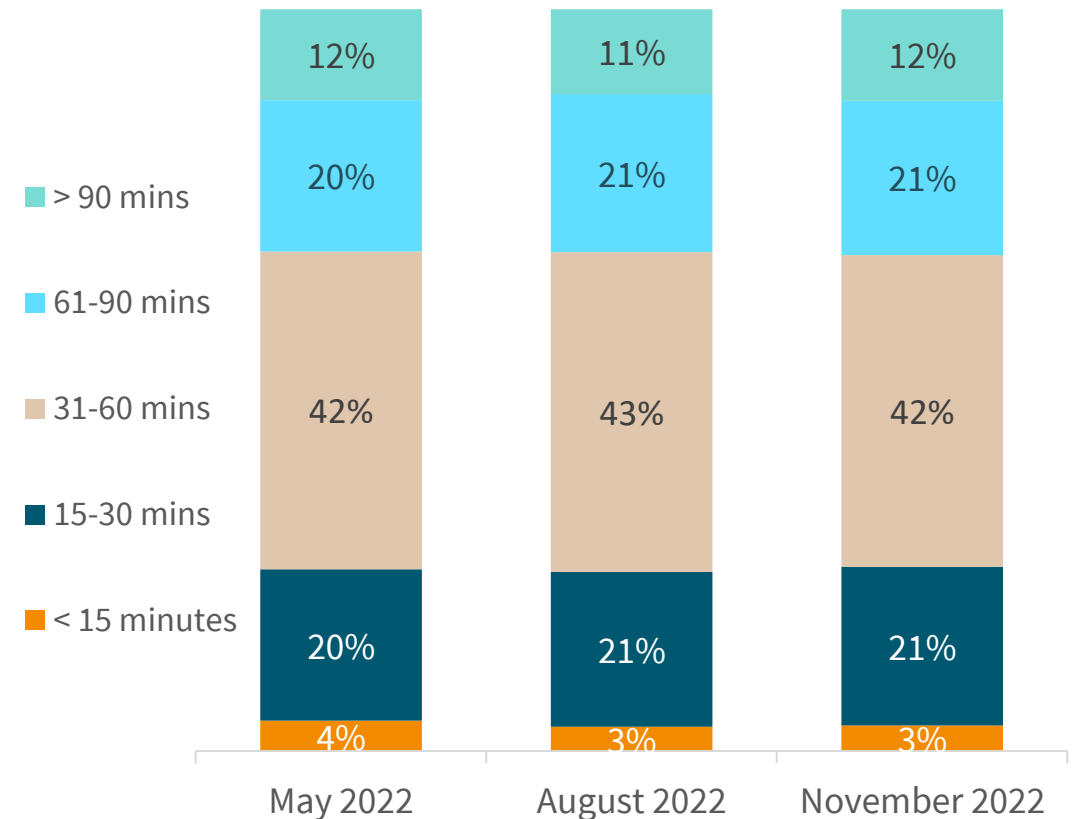
Members level of physical activity have remained consistent over the last 6 months

Seven in ten physically active members exercise at least four times per week and usually spend more than 30 minutes exercising daily

Physical activity – Number of days per week



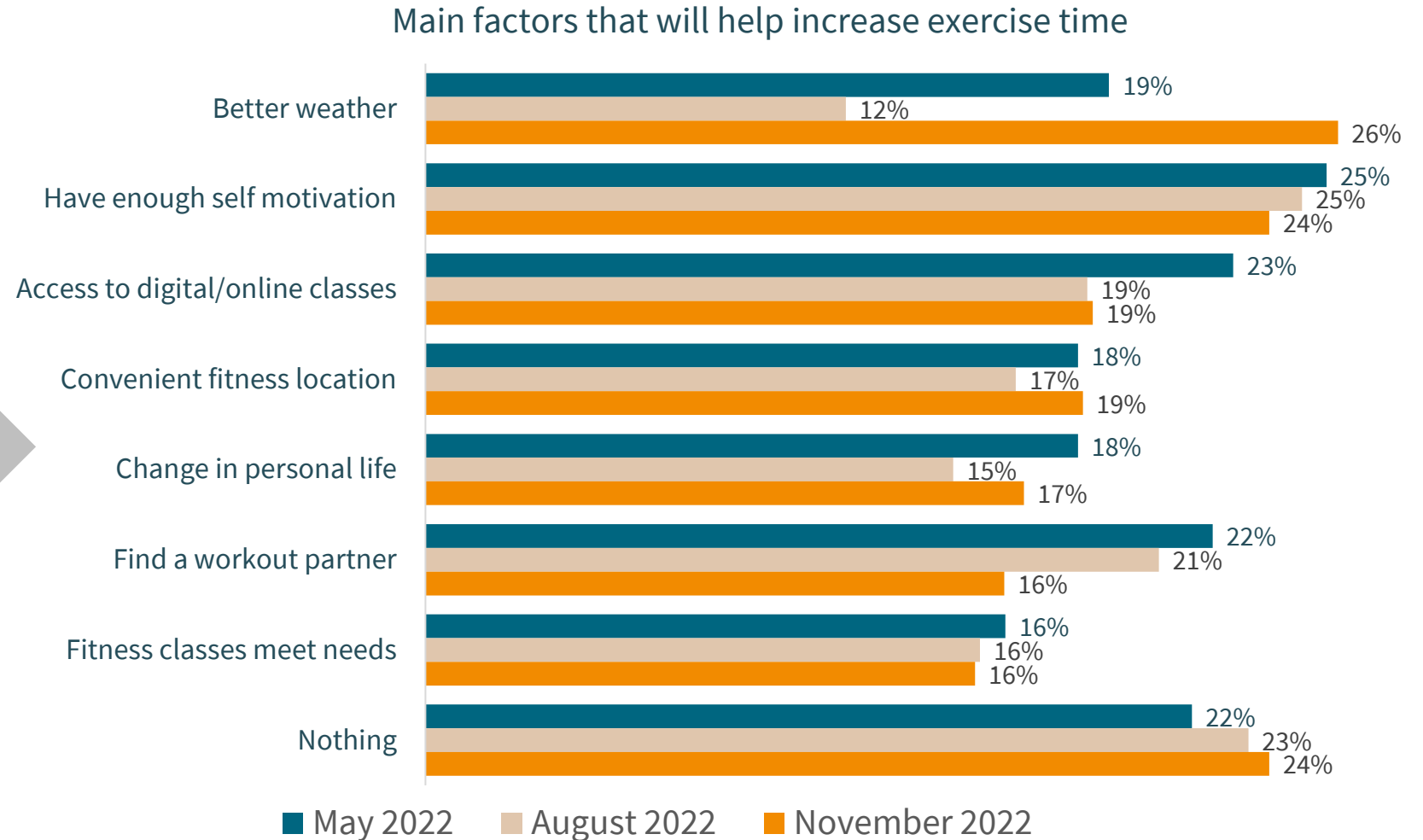
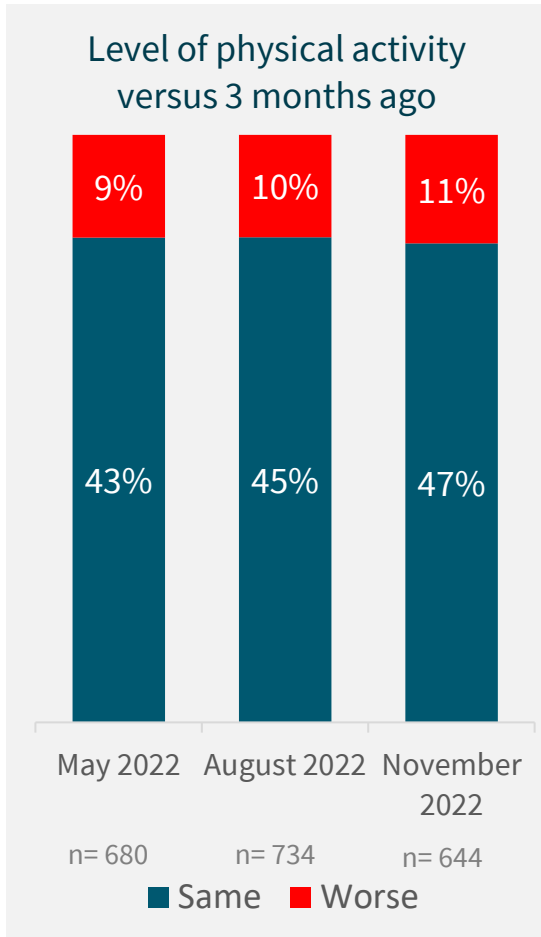
Physical activity – Time spent per day



Q3: In the last 3 months, about how many **days per week** on average have you been exercising or doing physical activity?
 Q4: In the last 3 months, about how much **time per day** on average do you spend doing exercise or physical activity?

Base May: n= 682, Base August: n= 743, Base November: n= 648

Better weather and higher self-motivation will help increase physical activity



Q5: How would you rate your level of physical activity now compared to 3 months ago?
 Q6: Which of the following reasons would motivate you to spend more time exercising or doing physical activity each day?

Base: May: n= 342, Base August: n = 396, Base November: n = 361

Self-motivation, access to digital classes and having more time to exercise remain the driving factors behind members who report an improvement in physical activity

Better level of physical activity compared to 3 months ago

May 2022

48%

August 2022

46%

November 2022

43%

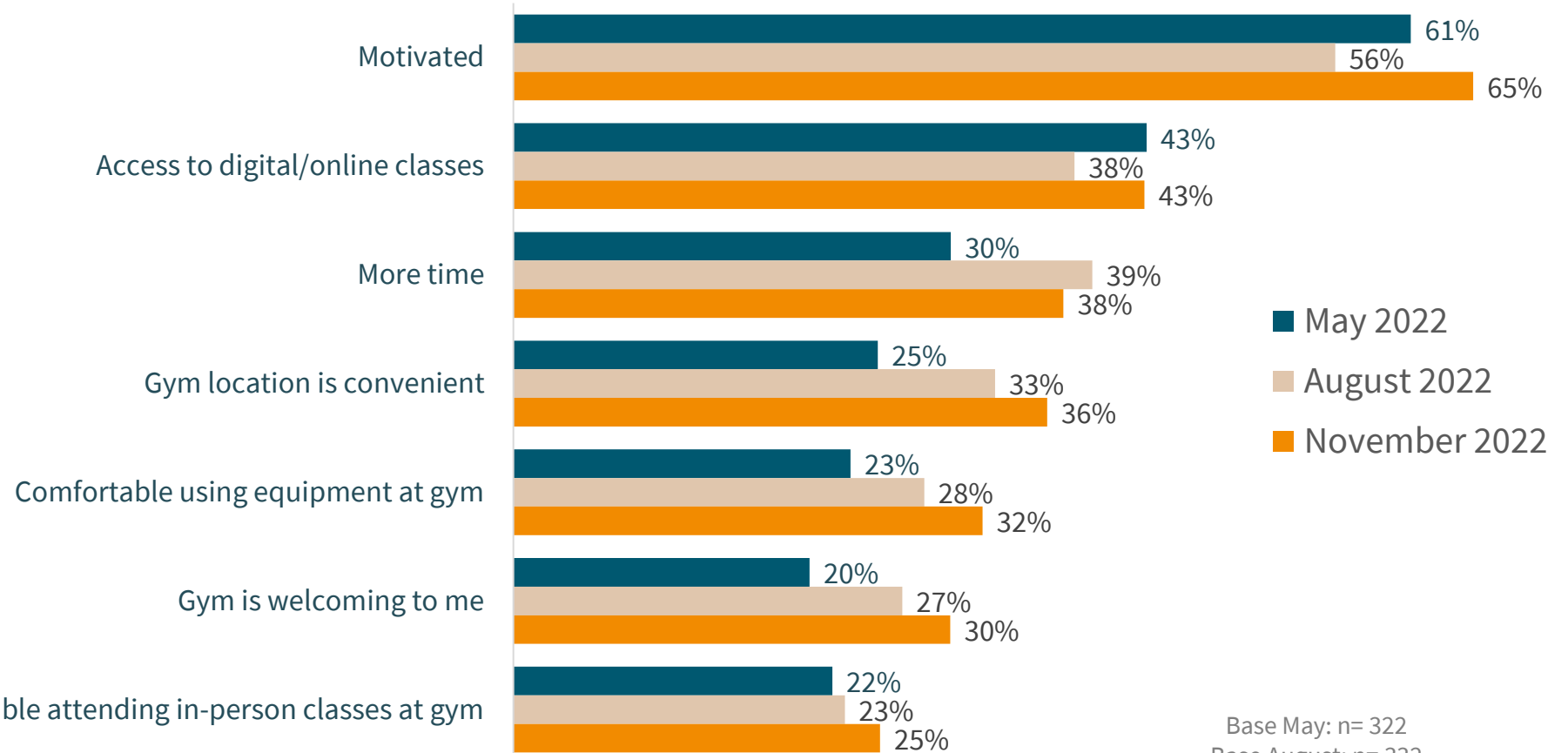
Base May: n= 680

Base August: n= 734

Base November: n= 644

Comfortable attending in-person classes at gym

Main reasons for improvement in physical activity



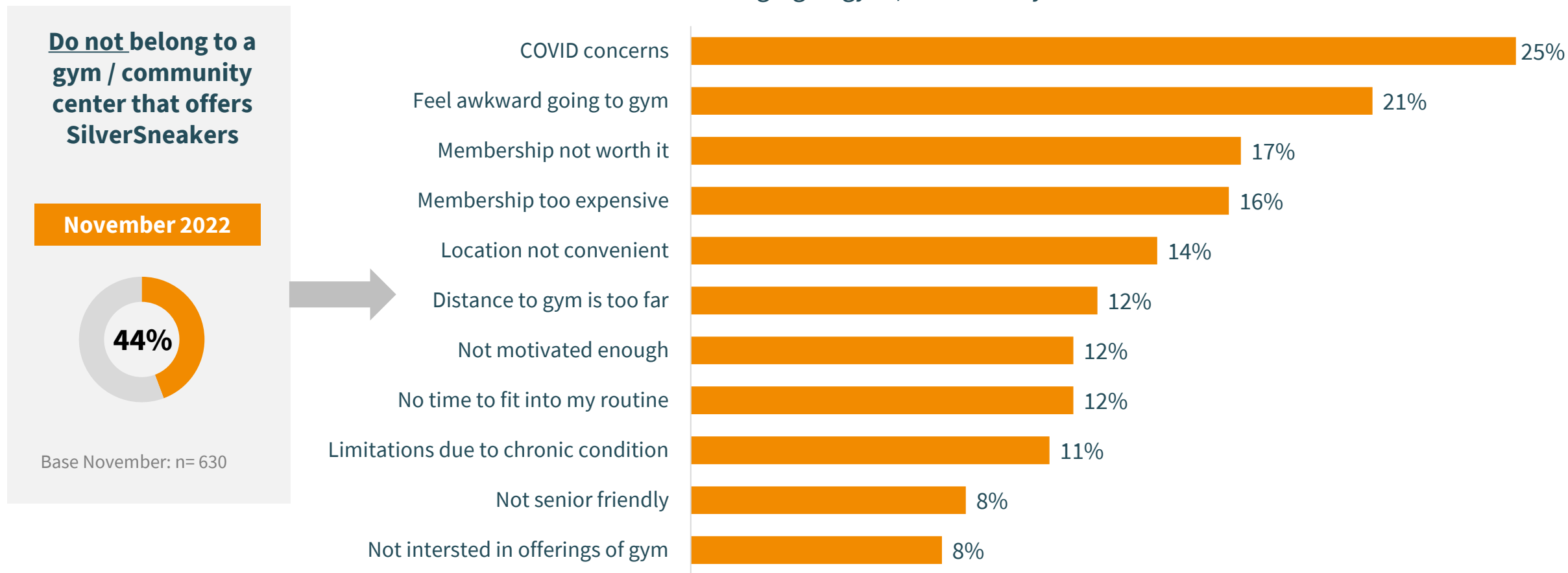
■ May 2022
■ August 2022
■ November 2022

Base May: n= 322
Base August: n= 332
Base November: n= 272

Q5: How would you rate your level of physical activity now compared to 3 months ago?
Q7: What do you think has led to this improvement in your physical activity?

One in four members who do not belong to a gym cite COVID as a concern, while one in five feel awkward going to the gym

Main reasons for not belonging to gym / community center that offers SilverSneakers



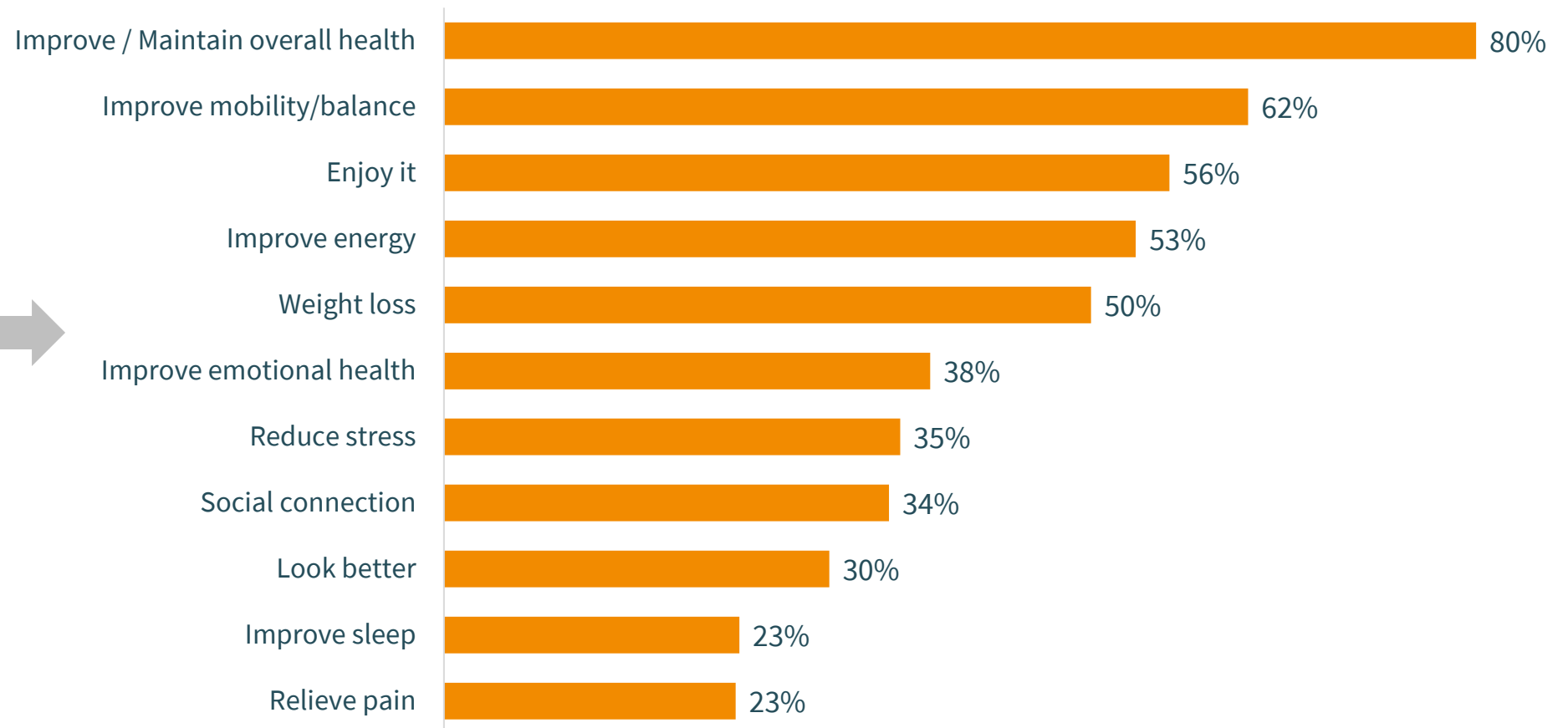
Q8: Are you currently a member of a fitness center, gym, health club or community center that offers SilverSneakers?
Q11: Which of the following are reasons explain why you are NOT a member of a fitness center, gym, health club or community center that offers SilverSneakers?

More than half of members currently belong to a gym that offers SilverSneakers

Maintaining or improving health and improving balance are the main reasons for members joining a gym



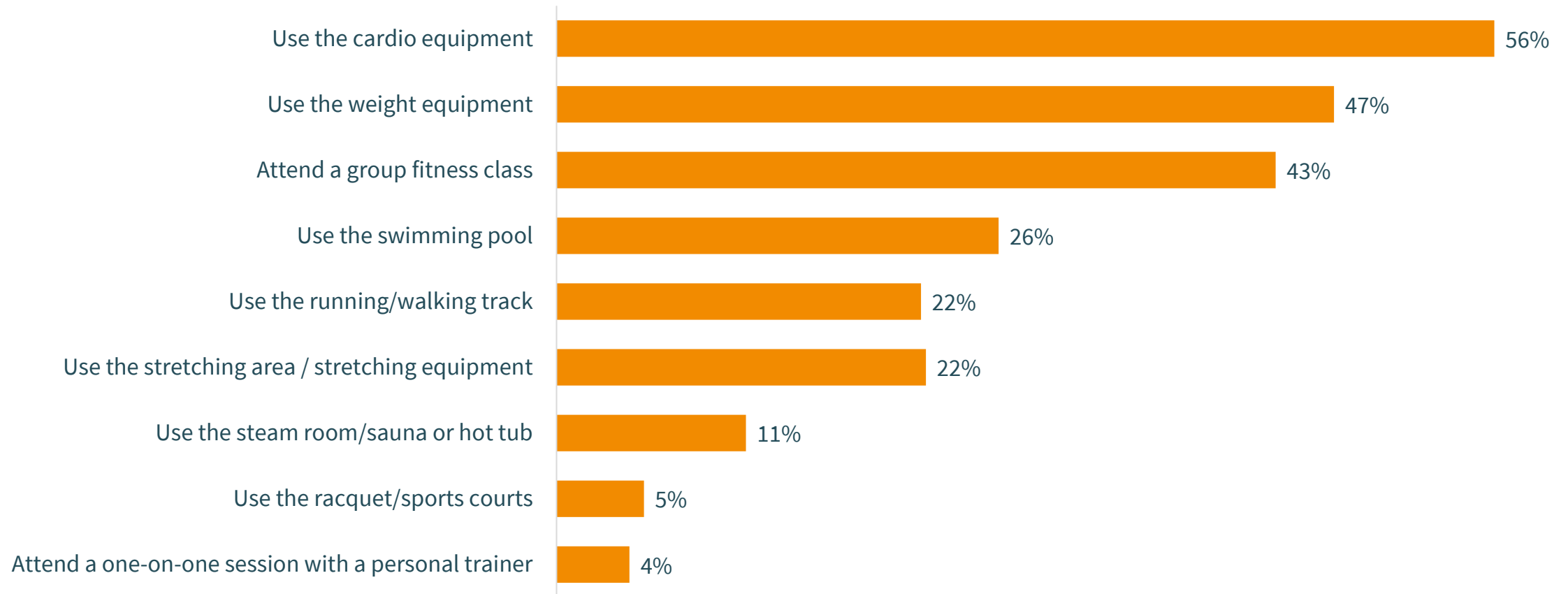
Reasons for joining gym / community center that offers SilverSneakers



Q8: Are you currently a member of a fitness center, gym, health club or community center that offers SilverSneakers?
Q9: Why did you join a fitness center, gym, health club or community center that offers SilverSneakers?

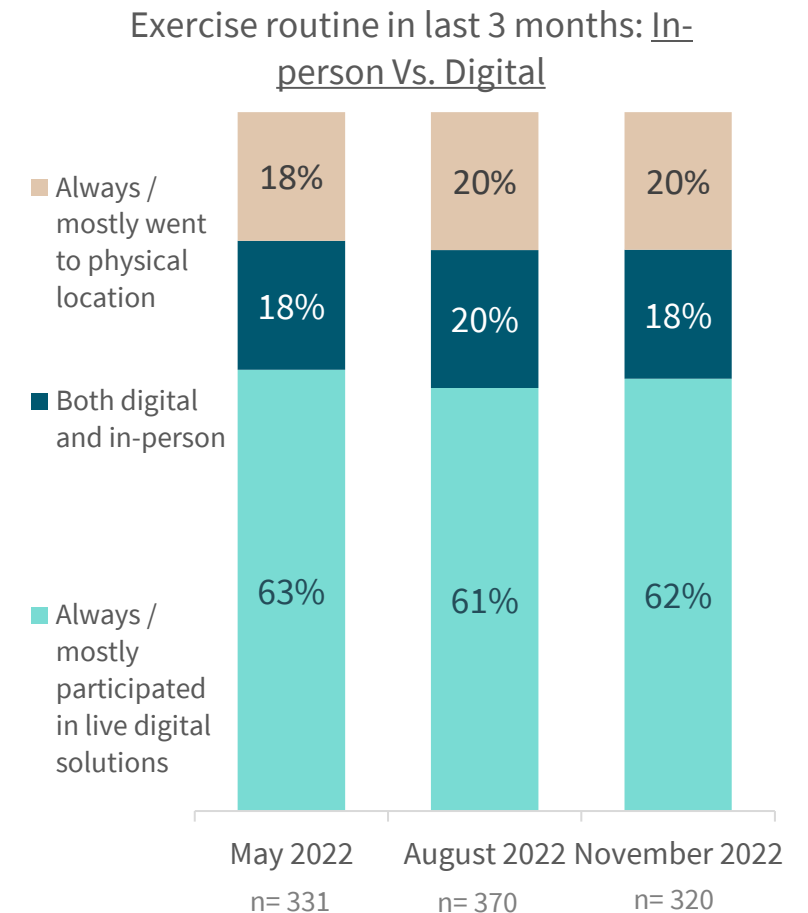
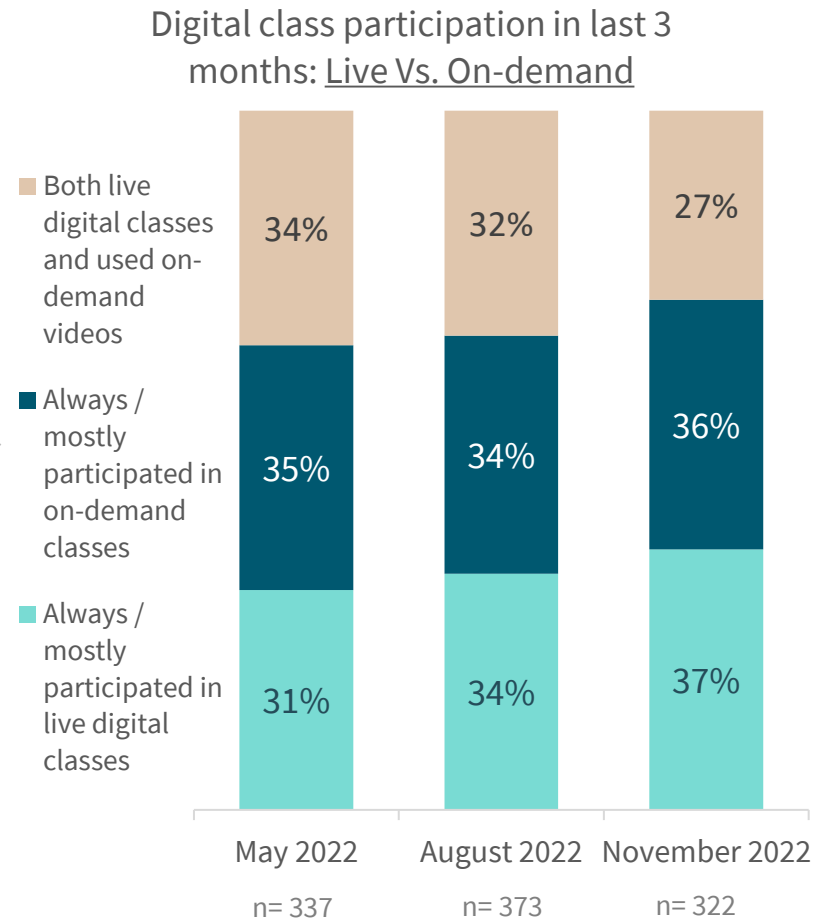
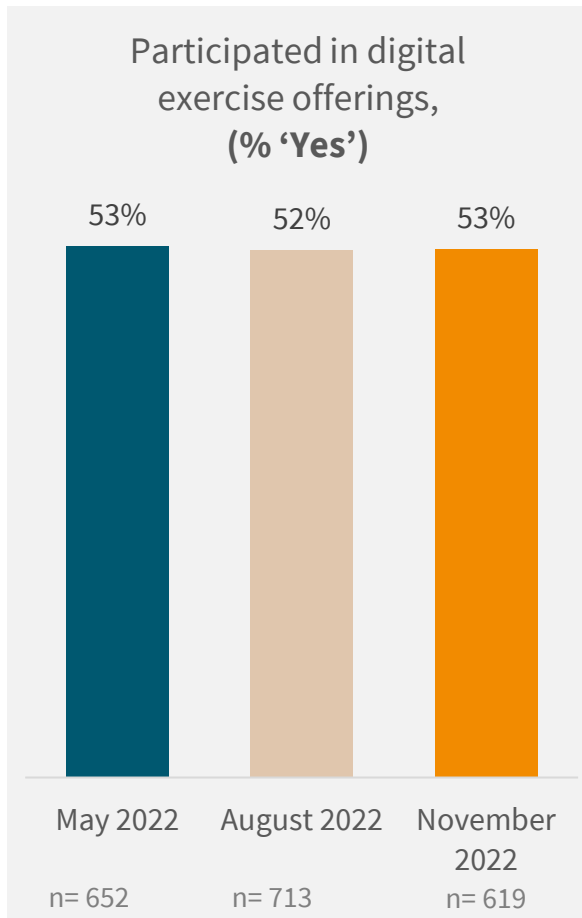
These gym goers mostly use the cardio and weight equipment as well as attend group fitness classes

Activities participated at gym / community center that offers SilverSneakers



A consistent number of members, (more than half) remain active participants in SilverSneakers digital offerings

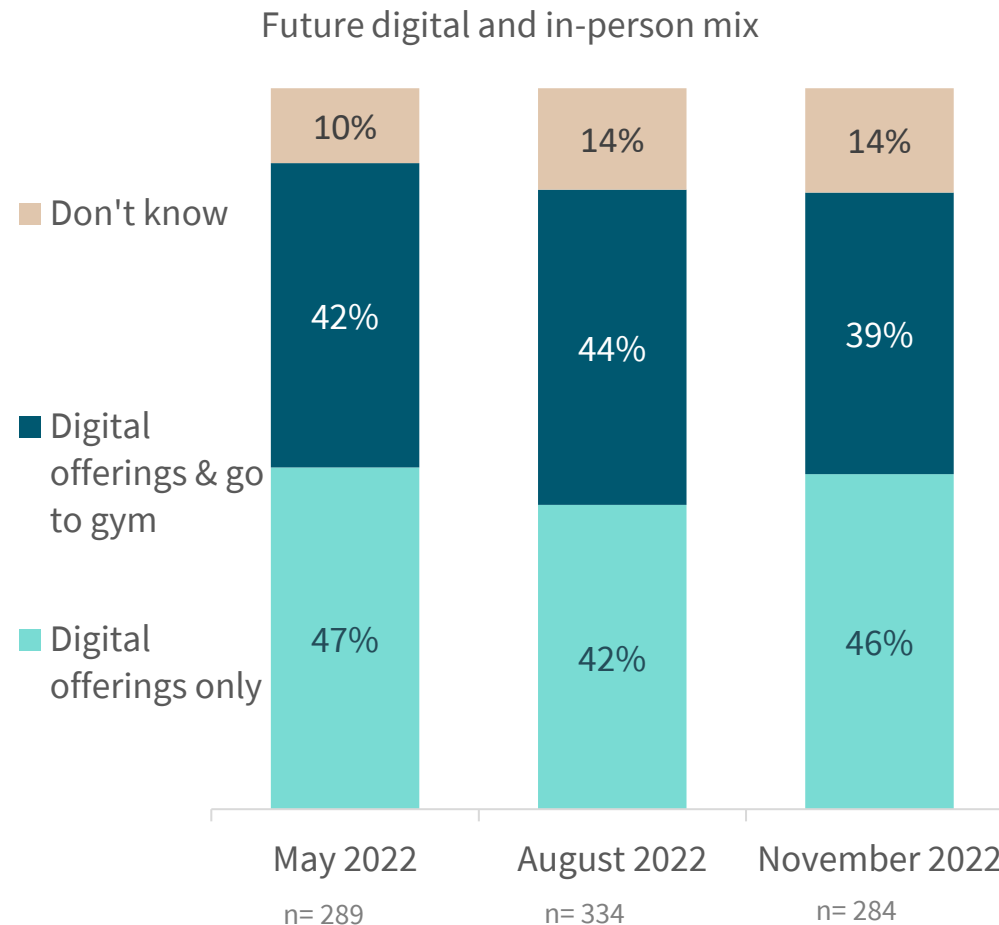
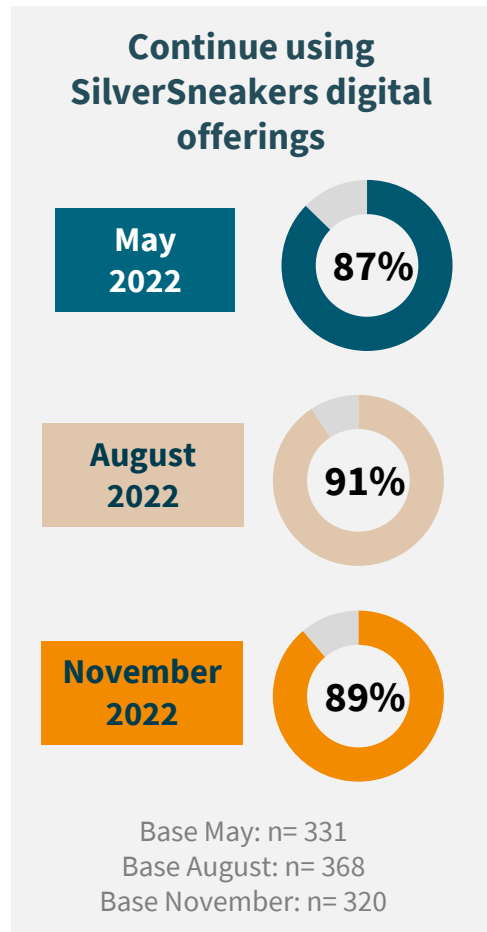
More members prefer live, or on-demand offerings as opposed to a combination of the two, compared to earlier in the year



Q12: Have you participated in any of SilverSneakers' digital offerings (i.e. SilverSneakers Live, Facebook Live, Flex Virtual Classes, On Demand Videos, SilverSneakers Go, etc.) in the last 3 months?

Q13: Which one of the following best describes your participation in digital/virtual fitness solutions in the last 3 months? Q14: Which of the following best describes your fitness/exercise routine in the last 3 months?

Consistent with previous months, nine out of ten SSF members using digital offerings plan to continue to do so in the future



Q15: Will you continue to use SilverSneakers digital offerings in the next 3 months?

Q16: Will you continue to use SilverSneakers digital offerings only or in combination with in-person at a gym, fitness center or community center in the next 3 months?

Q17: Do you plan to exercise in the next 3 months?



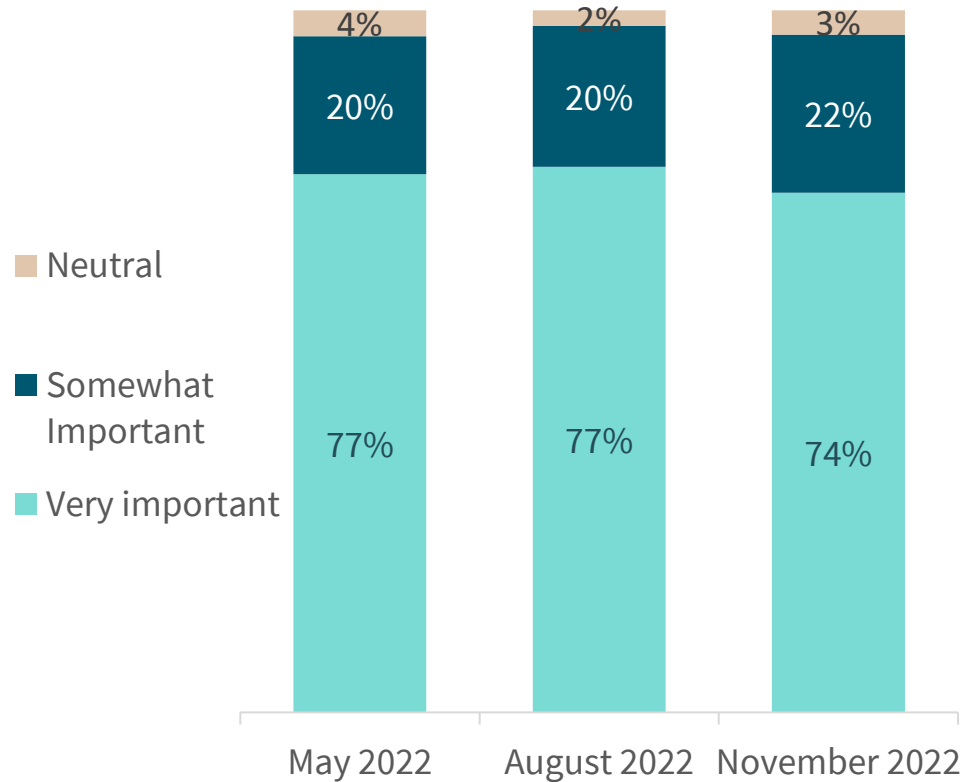
Nutrition

Now, let's talk about food and nutrition

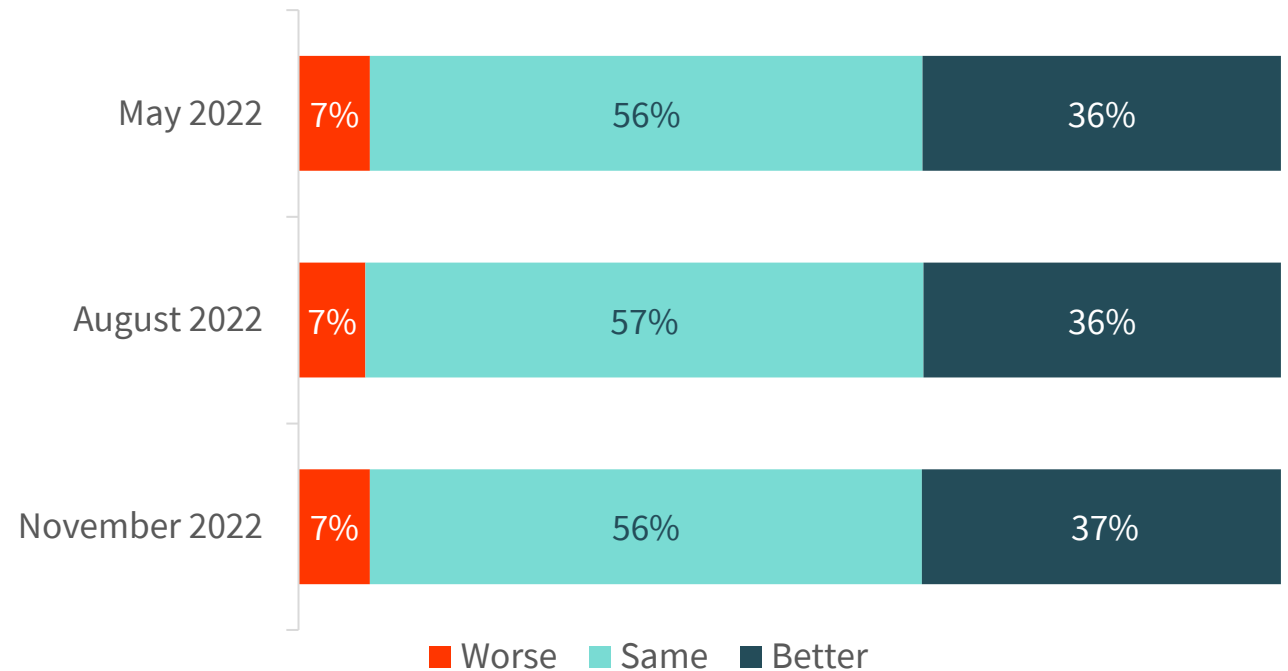


Eating habits remain relatively unchanged over the course of six months

Importance of eating healthy food to one's health*



Eating habits compared to 3 months ago*



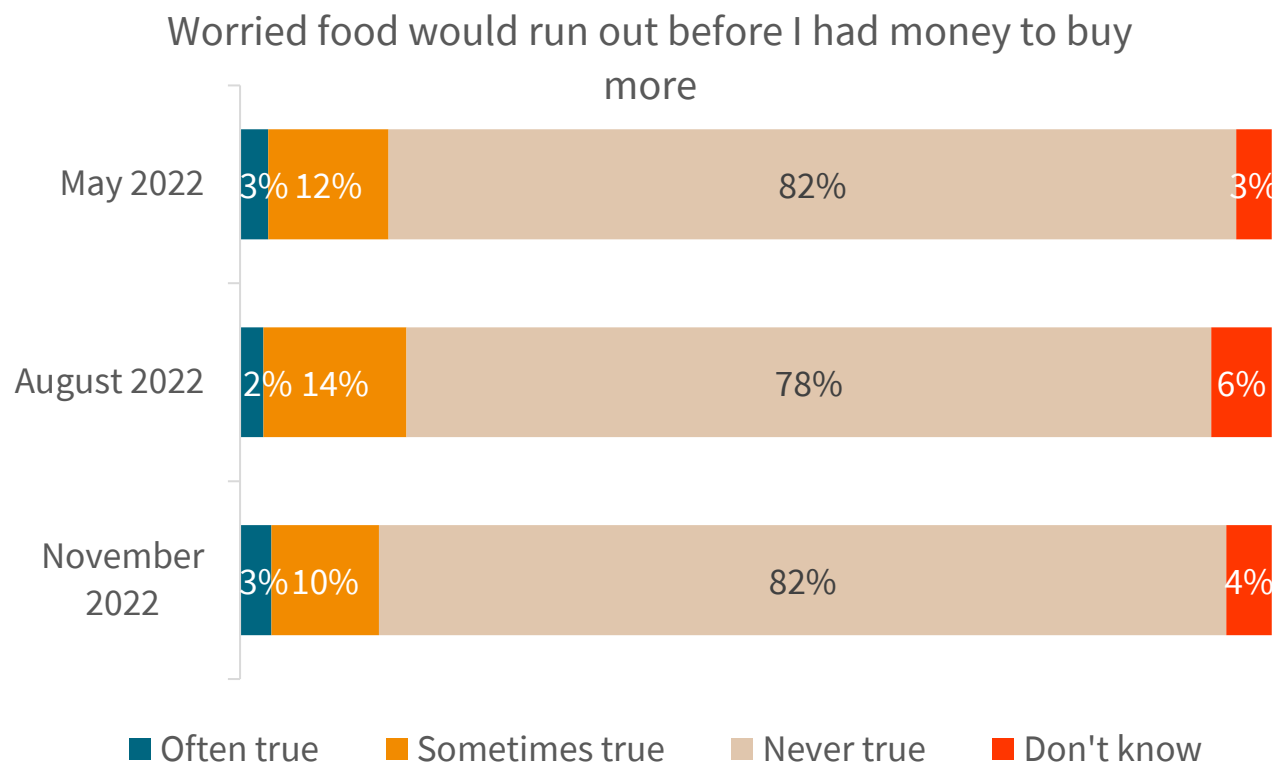
Base May: n= 702
 Base August: n= 750
 Base November: n= 664

*Based on a 5-point rating scale

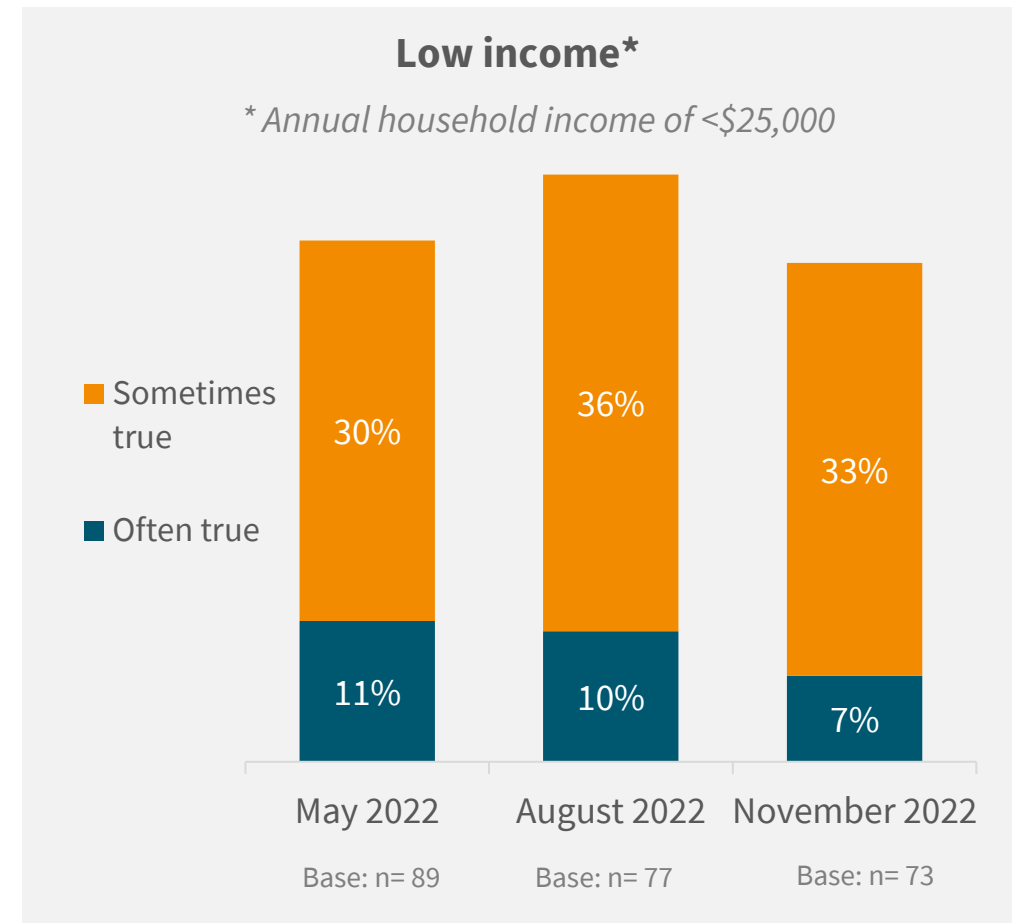
Q18: How important or unimportant is eating healthy foods to your overall health and well-being?
 Q20: How would you rate your eating habits now compared to 3 months ago?

About one in eight SSF members are concerned about their own food insecurity, at least some of the time

This concern is expressed by four in ten low-income members



Base May: n= 702
 Base August: n= 751
 Base November: n= 662



Q19: 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?

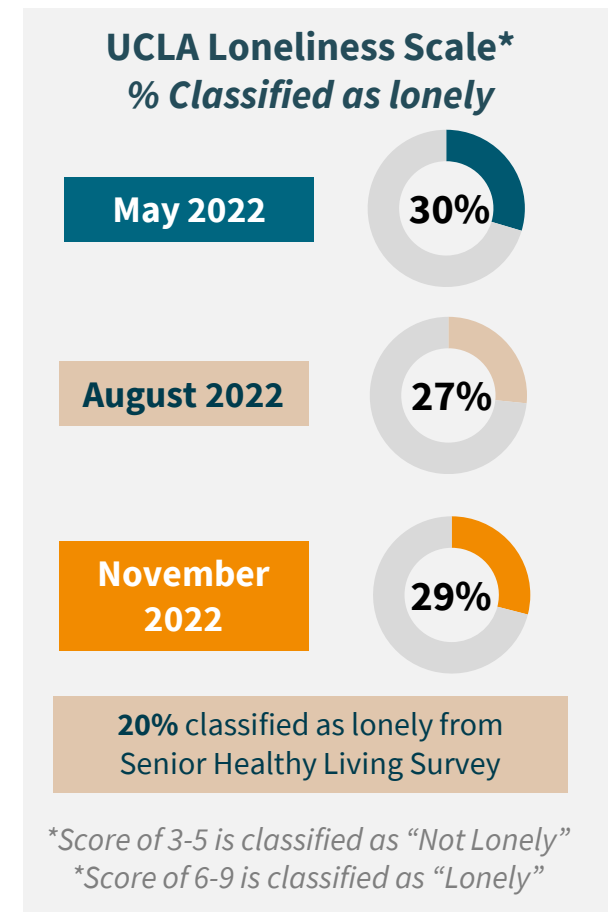
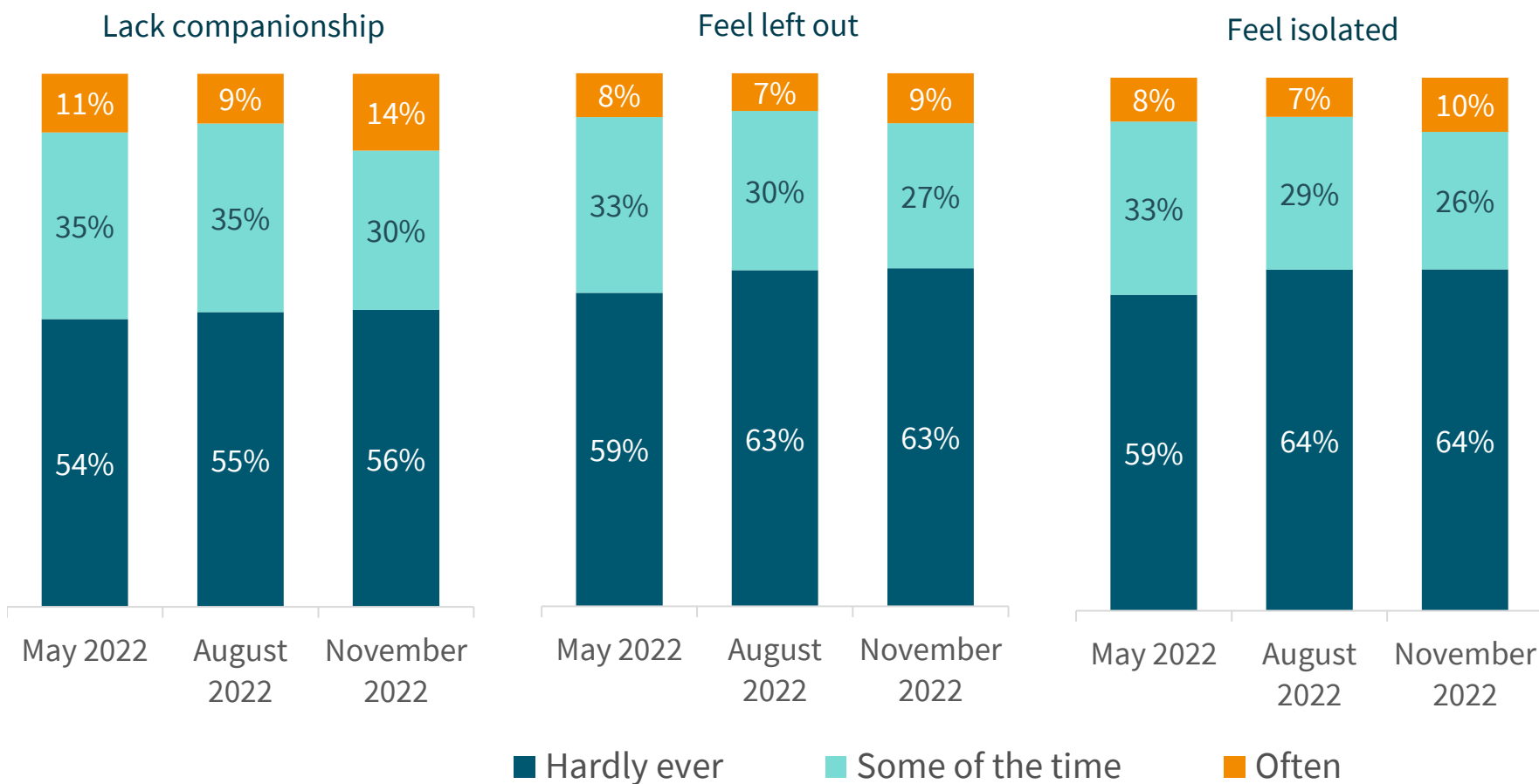


Social Connection

Now, let's talk about social connection



More than one-third of members report feeling isolated or left out, a similar proportion compared to 3 months ago

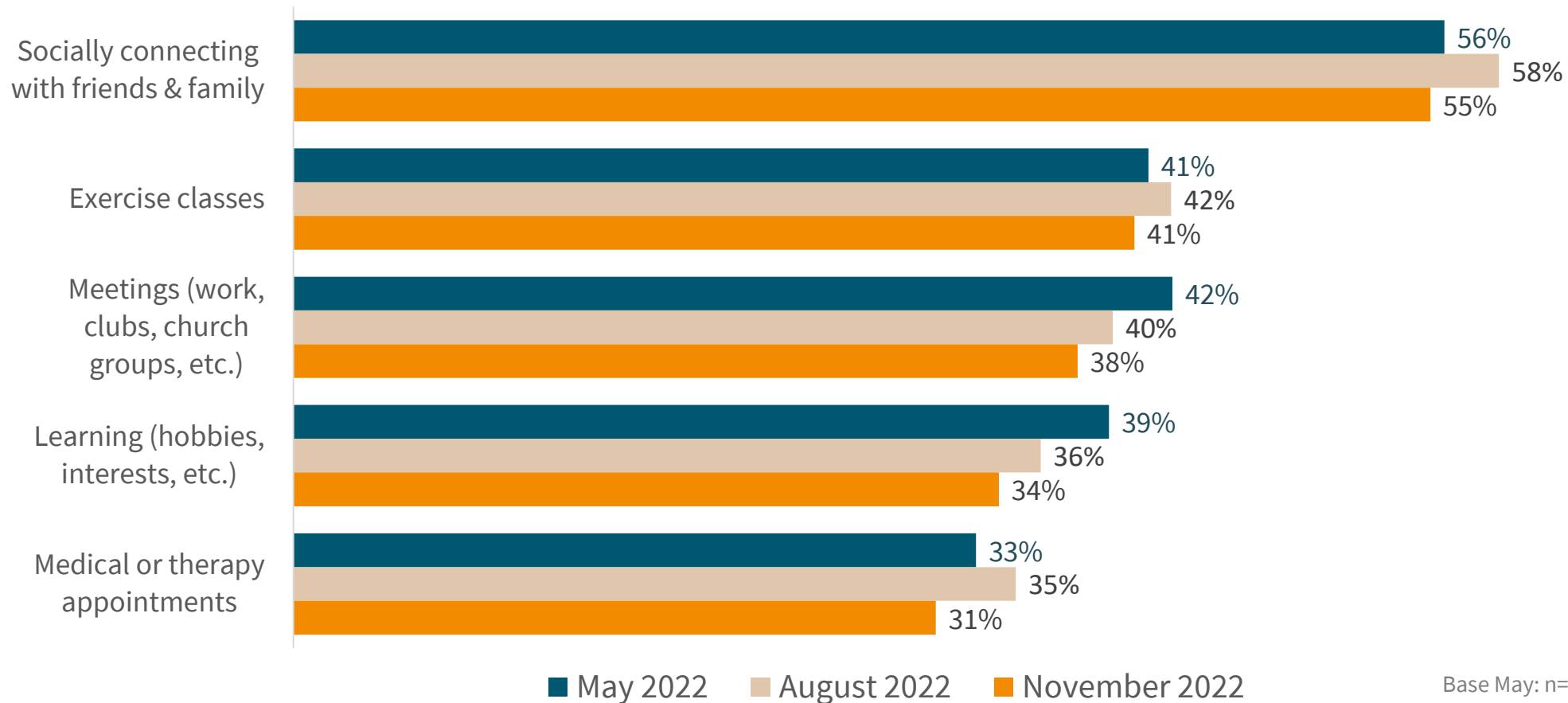


Base May: n= 692
Base August: n=746
Base November: n= 659

Engaging with friends and family digitally continues to be a popular activity among members

Four in ten members continue to use a digital platform for exercise classes

Use of video calls or live streaming in the following activities (% 'Yes')



Base May: n= 686
Base August: n= 746
Base November: n= 658

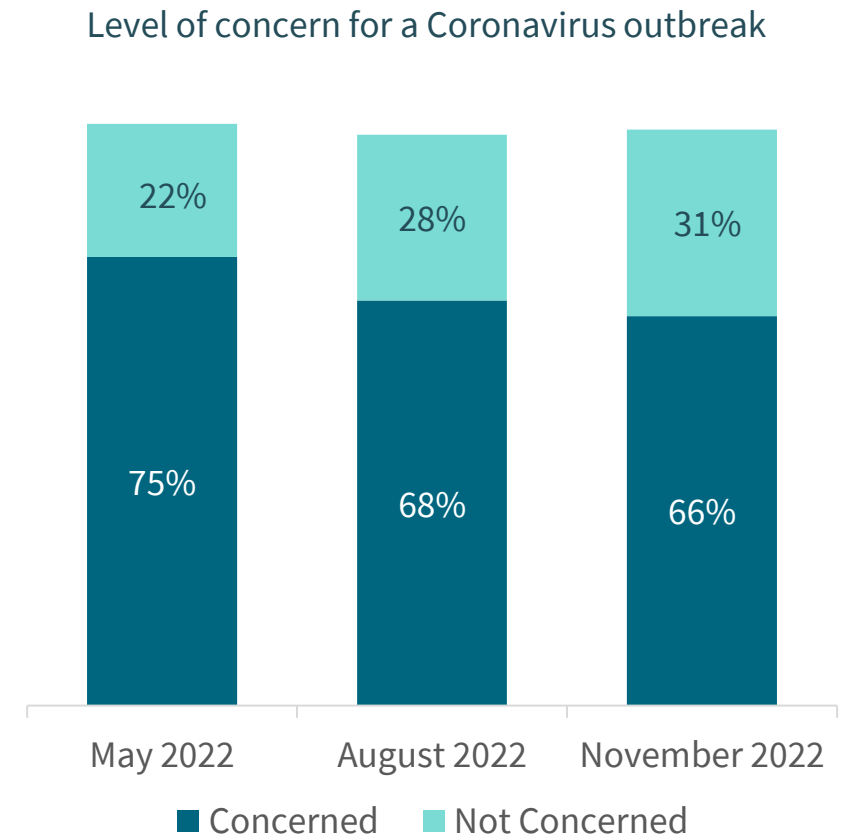
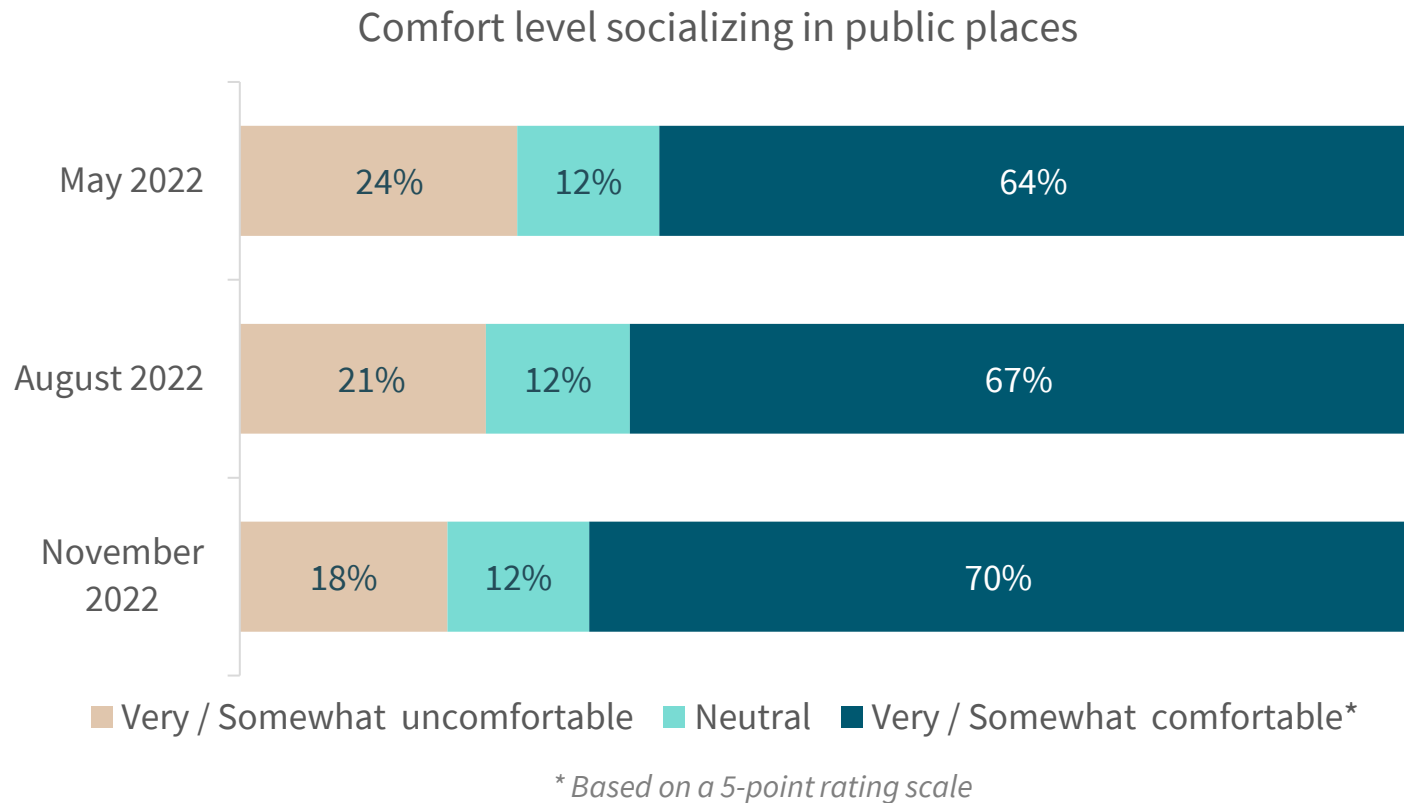


COVID-19 Perceptions & Attitudes

Now, let's talk about COVID-19



SSF members continue to show less concern about a Coronavirus outbreak and are more comfortable socializing in public, especially compared to 6 months ago



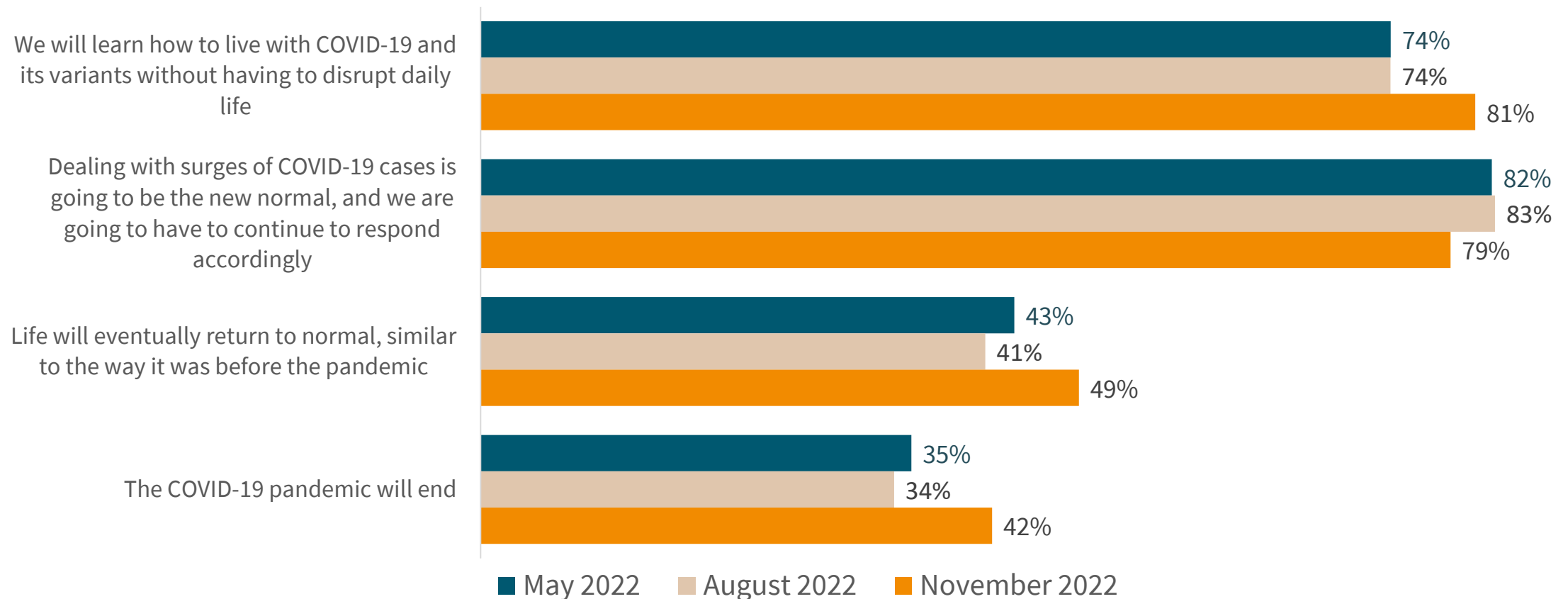
Base May: n= 656
 Base August: n= 745
 Base November: n= 658

Q23: How comfortable are you socializing with friends / family in public places right now?
 Q25: How concerned are you about a Coronavirus outbreak?

In the last 3 months, more members believe COVID will end, and life will be similar prior to the pandemic

Most members, (81%) also mention that they will live with COVID without it affecting daily life

Level of certainty with regards to the following (% 'Total certain')*



* Based on a 5-point rating scale

Base May: n= 656
Base August: n= 740
Base November: n= 650



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HEALTH

