



SilverSneakers Pulse

Quarter 1, 2023

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Tivity Health Consumer Research

March 2023



Key Findings

Fitness / Physical activity

- 92% of SSF members currently participate in physical activity, while 97% plan to exercise in the next three months.
 - Members perceive physical activity and fitness activity similarly
- More than half, (55%) 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 to 2022 with six in ten members reporting no change, while just over a third report better eating habits, (34%), and 6% report worse eating habits compared to three months ago.
- About one in eight members are concerned about their own food security, a similar number to 2022

Social Connection

- Nearly one in three, (28%) members are classified as lonely, the same number as Q4 of 2022, while most members continue to engage with friends and family digitally

COVID-19 Perceptions & attitudes

- Members are less concerned about a COVID-19 outbreak than ever and are more comfortable socializing in public places, compared to last year
 - Despite this, one in four members cite concerns about COVID-19 as a barrier to join a gym

New Year's Resolutions

- Not surprisingly, eating healthier and more physical activity are the top New Year's resolutions mentioned by members
- Members primarily find information on these topics through health and wellness websites and their Primary Care Physician, (PCP)

Objectives & Methodology



Survey via SilverSneakers
Newsletter



791 total responses
received



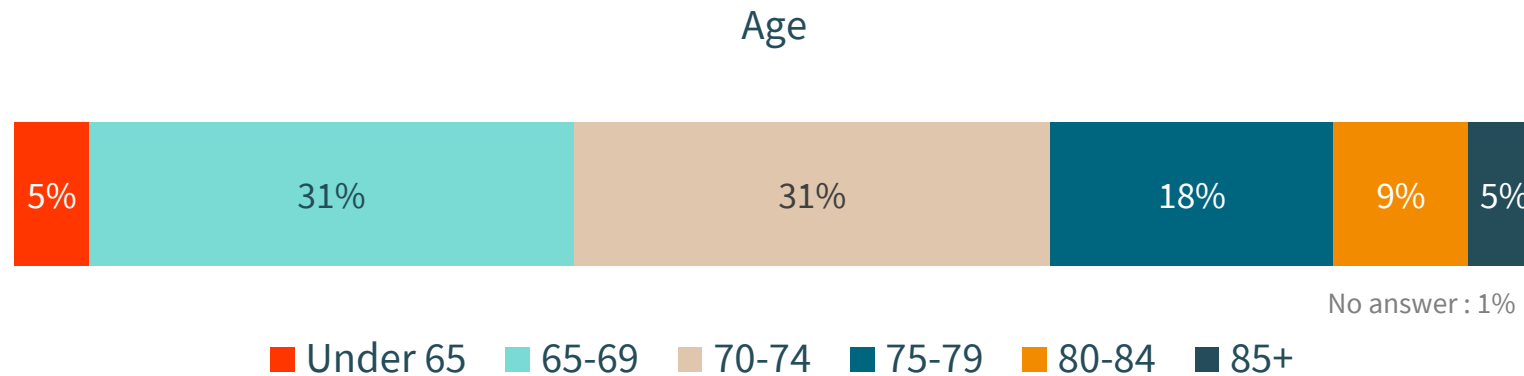
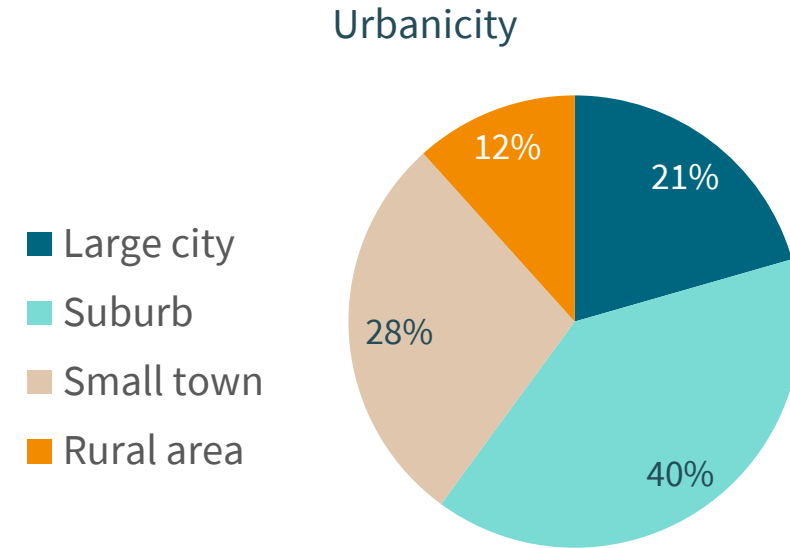
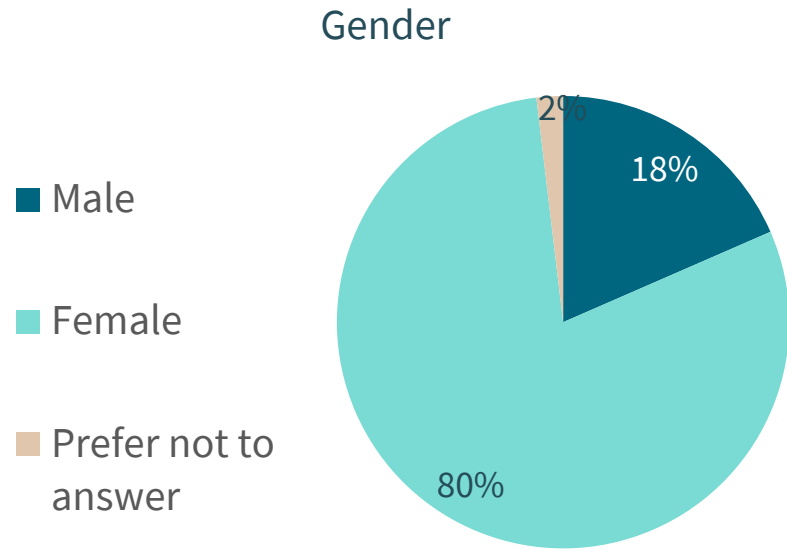
Fieldwork period:
February 23rd – 28th, 2023

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
- New year's resolutions

Respondent Profile – Quarter 1, 2023



Base: n= 688



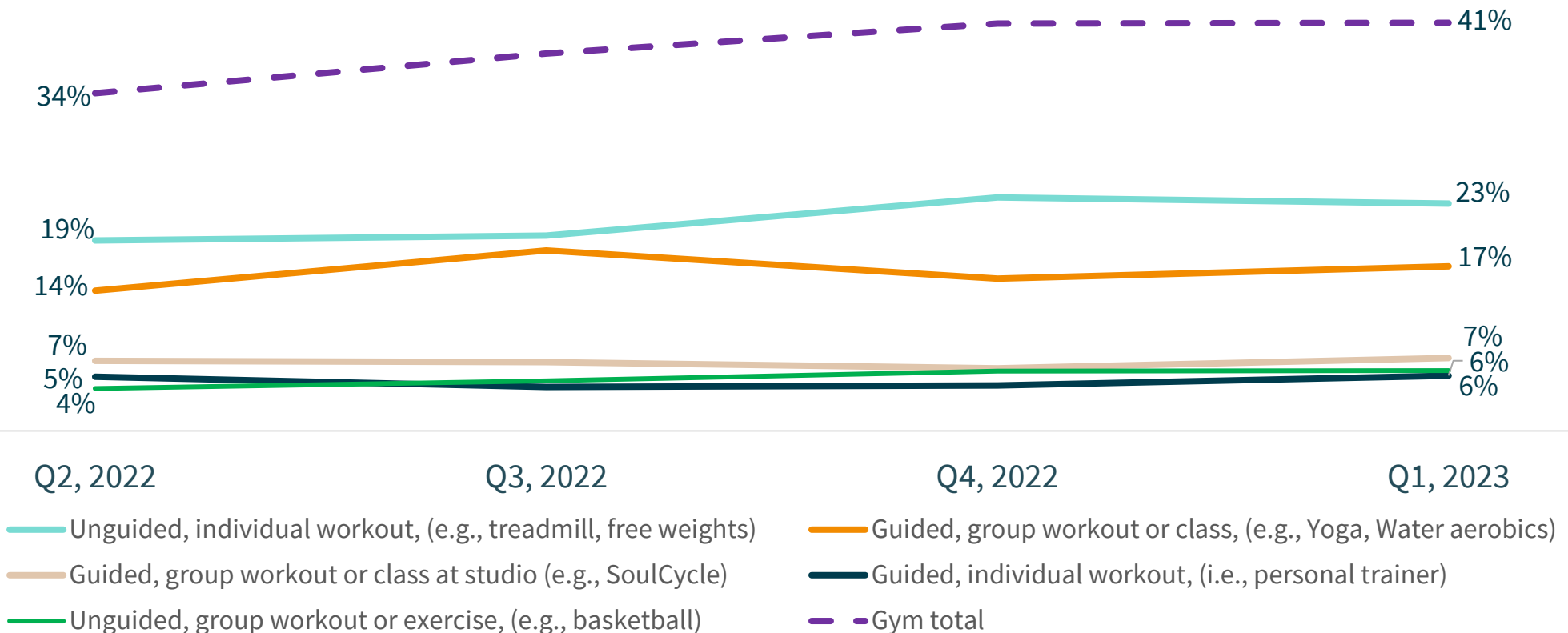
Fitness & Physical Activity

Now, let's talk about physical activity



Individual workouts and guided group classes remain the most popular activities performed at the gym

Current physical activity - Gym

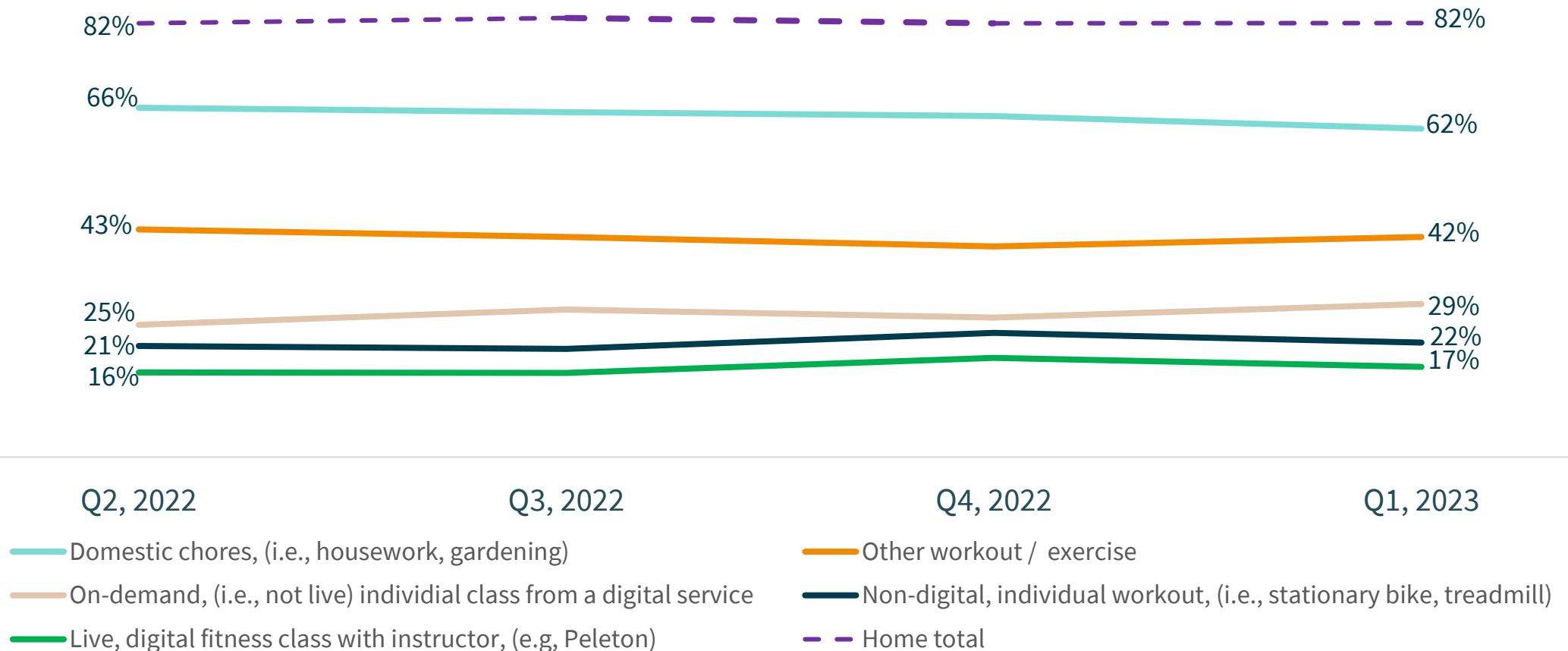


All physical activity, Q1, 2023: 92%

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

Chores are still the top physical activity performed at home

Current physical activity - Home

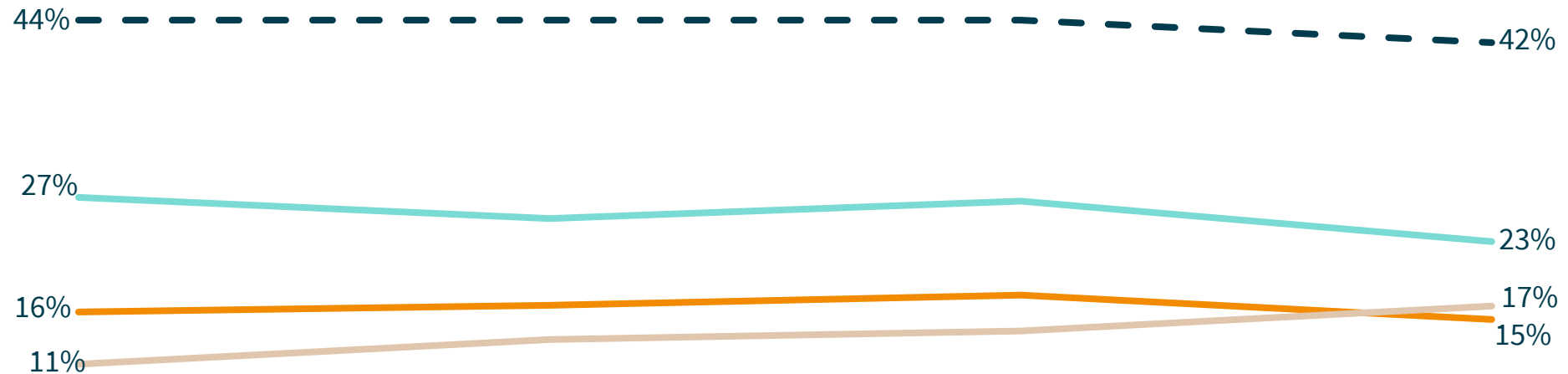


All physical activity, Q1, 2023: 92%

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

The proportion of members engaging in community activities has remained constant since last year

Current physical activity - Community



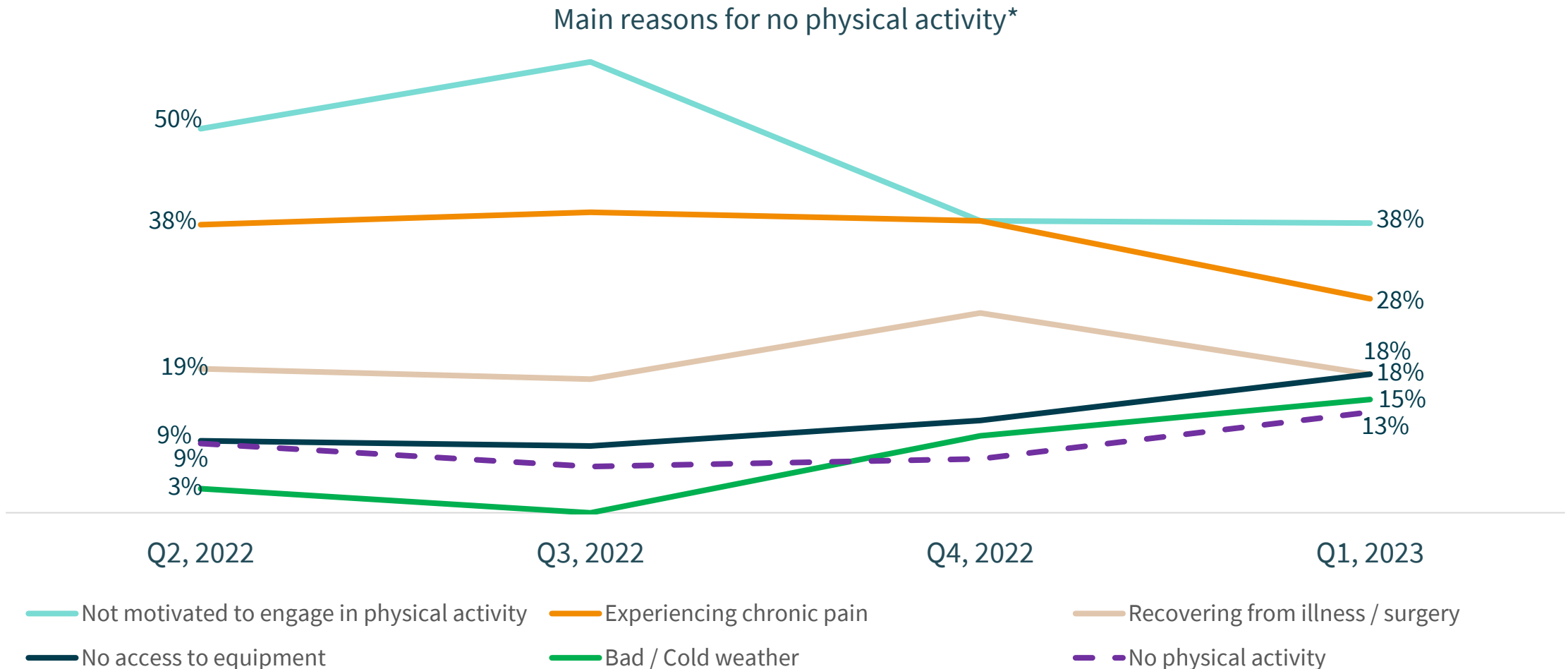
— Outdoor individual exercise — Outdoor group exercise — Other outdoor exercise - - Community total

All physical activity, Q1, 2023: 92%

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

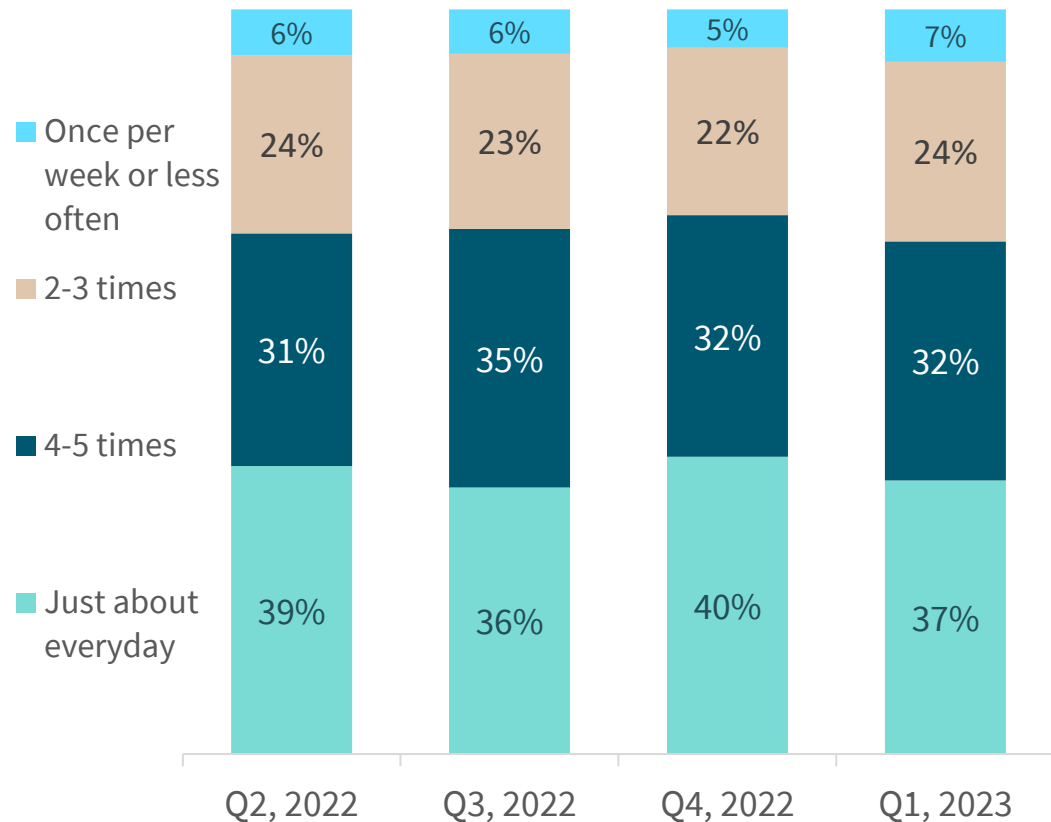
Lack of motivation and chronic pain continue to drive physical inactivity among members

Bad or cold weather during the winter months affects physical activity more so than in the warmer months

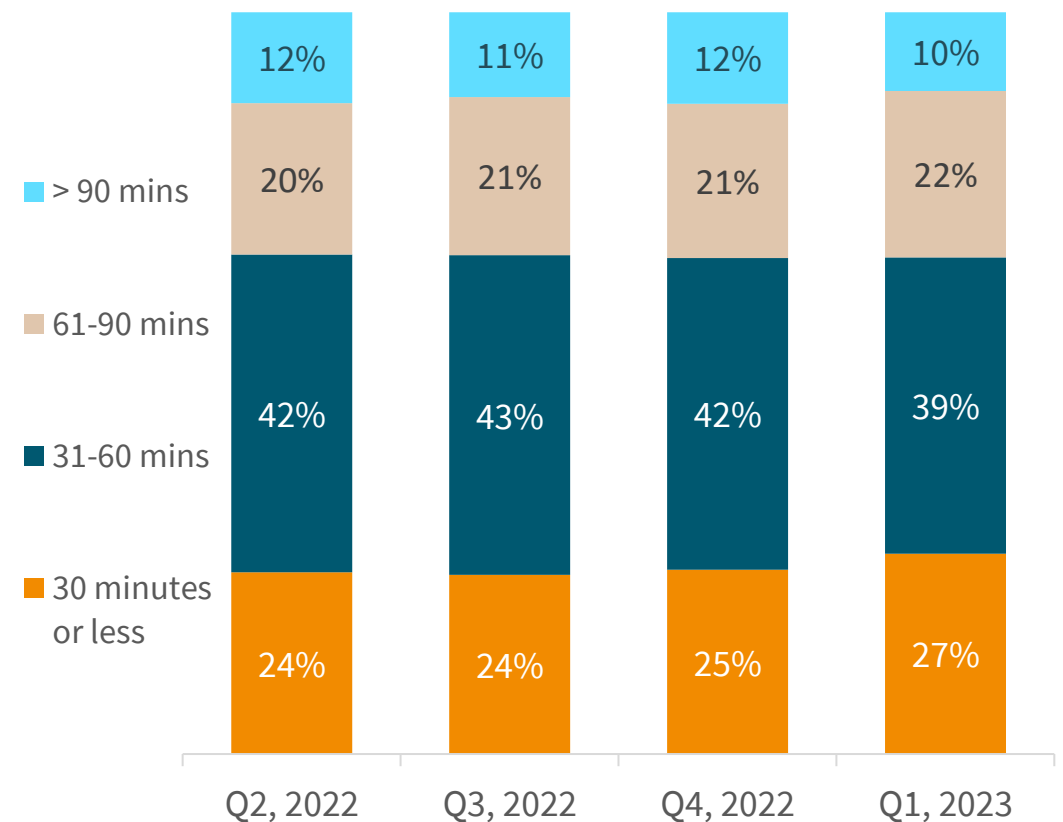


Seven out of ten members are physically active a least 4 times per week, spending up to 60 minutes per day

Physical activity – Number of days per week



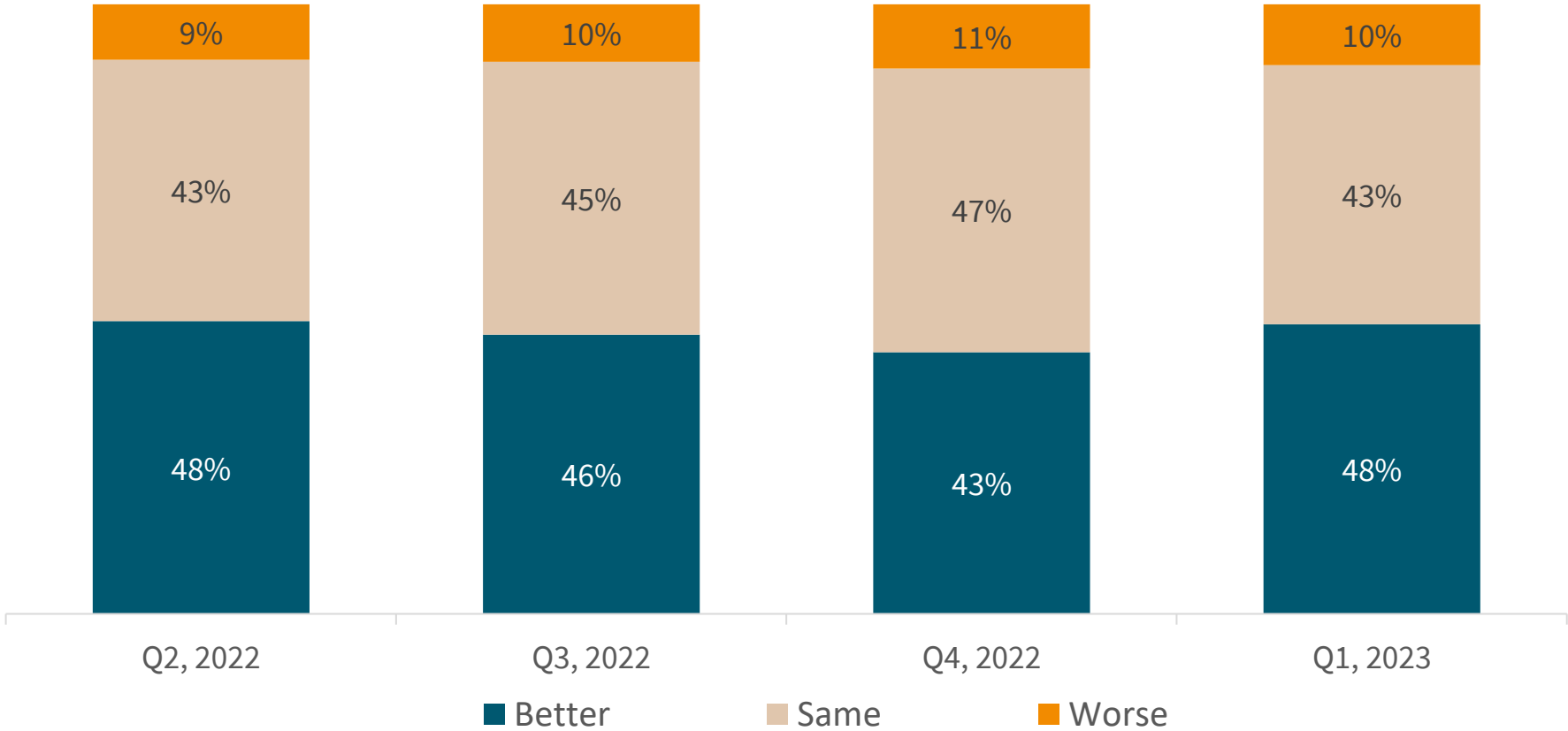
Physical activity – Time spent per day



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?

Almost half of members rate their physical activity better than three months ago, an increase from Q4 of 2022

Level of physical activity versus 3 months ago

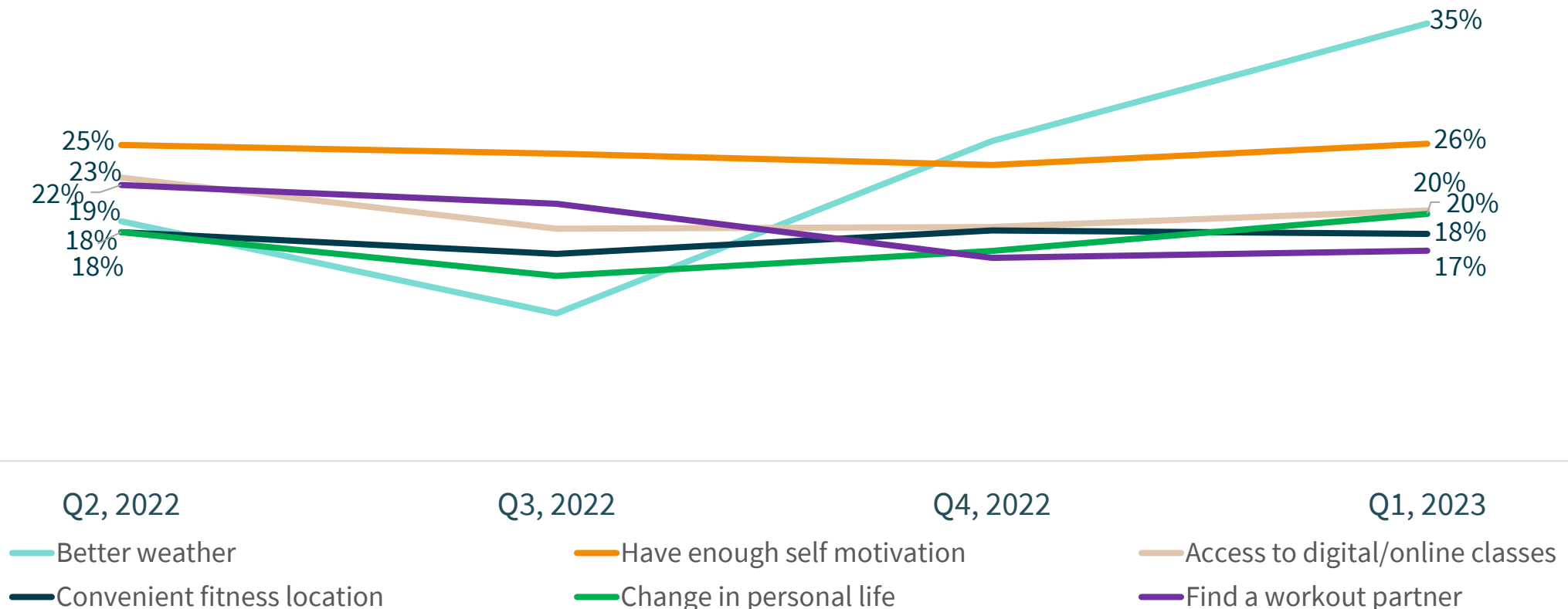


Q5: How would you rate your level of physical activity now compared to 3 months ago?

Better weather is the main driver that will help increase physical activity among SSF members during winter

Higher self-motivation will help about one-in four members increase their physical activity

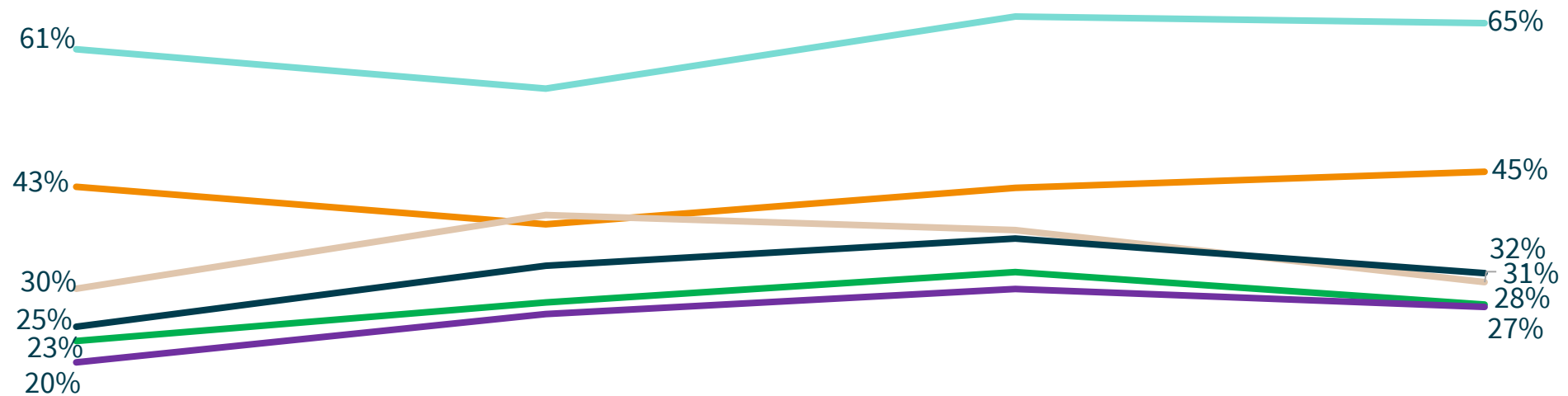
Main factors that will help increase physical activity time*



* Among those whose physical activity is the **same or worse** versus 3 months ago

Self-motivation and access to digital classes remain key drivers for members who report an improvement in physical activity

Main reasons for improvement in physical activity



Q2, 2022

Q3, 2022

Q4, 2022

Q1, 2023

Motivated

Access to digital/online classes

More time

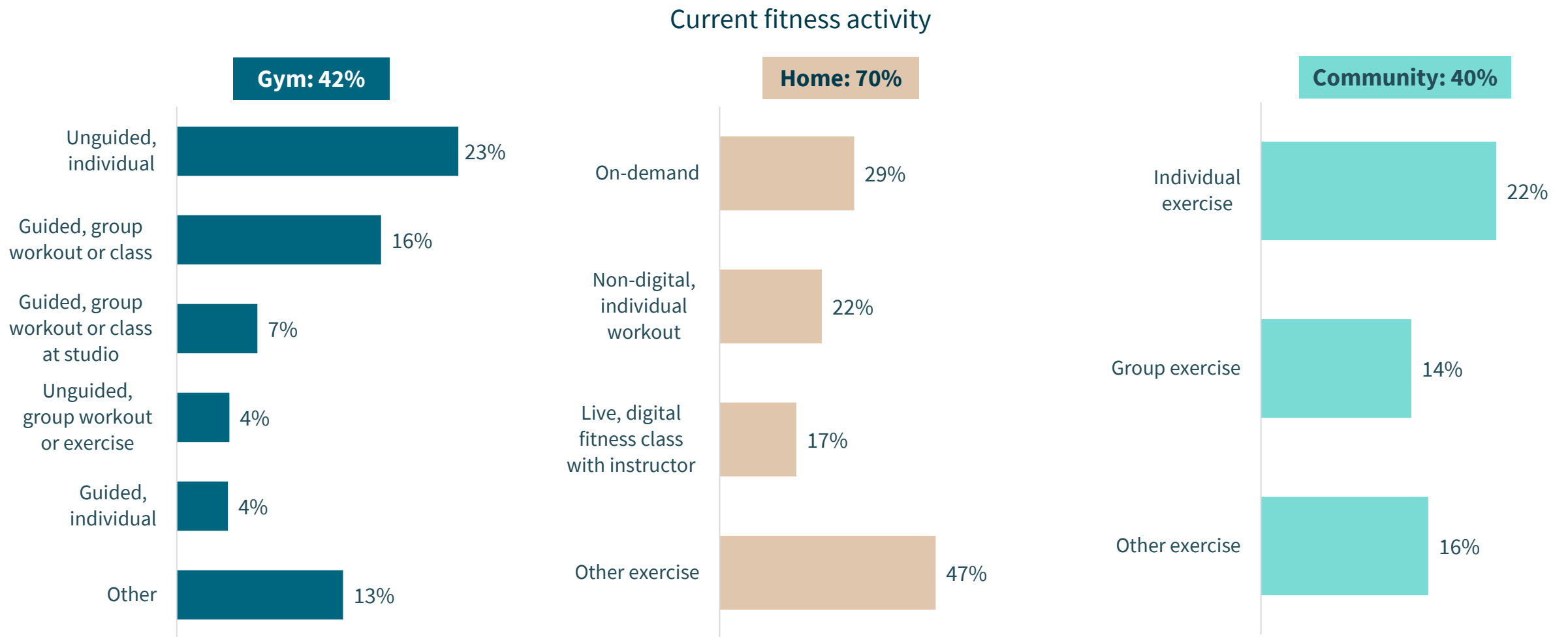
Gym location is convenient

Comfortable using equipment at gym

Gym is welcoming to me

* Among those whose physical activity is **better** versus 3 months ago

Members' fitness regimen is similar to their physical activity regimen

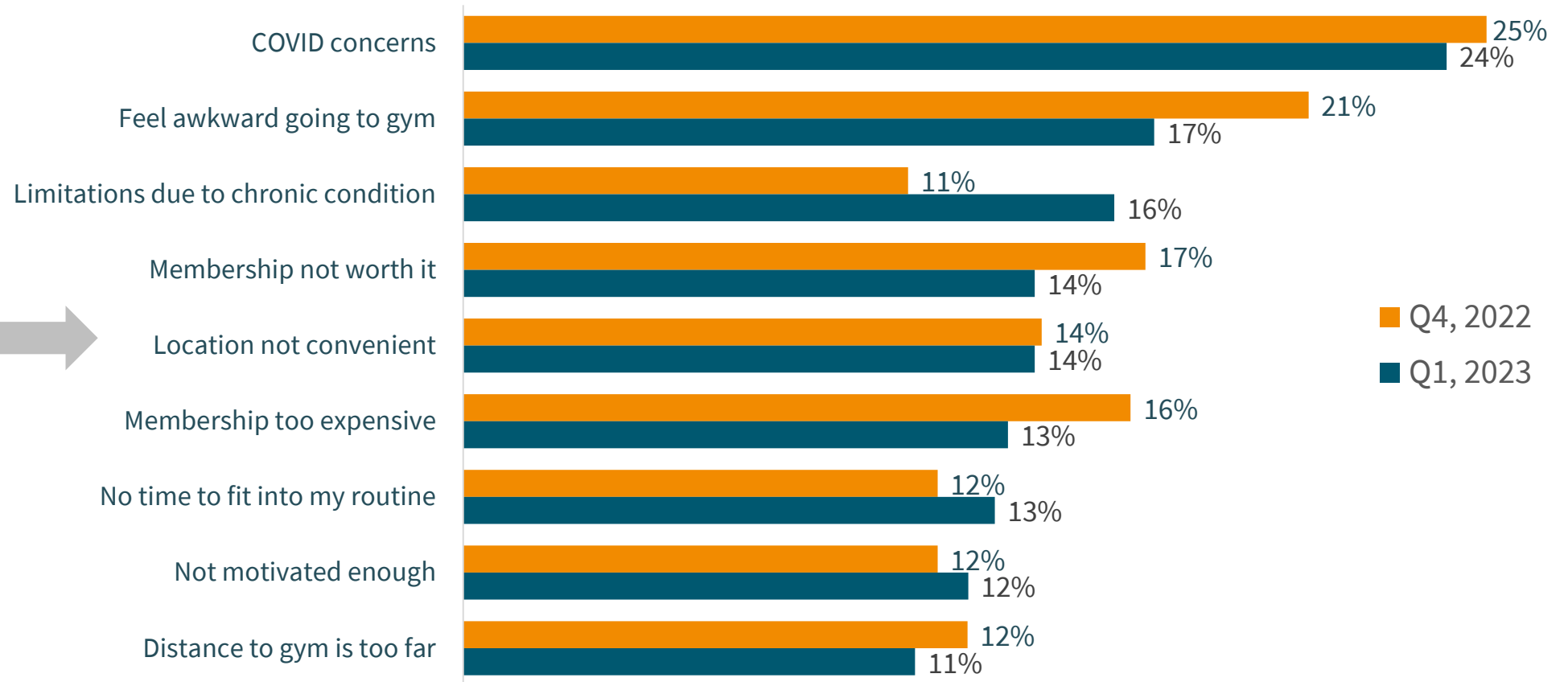
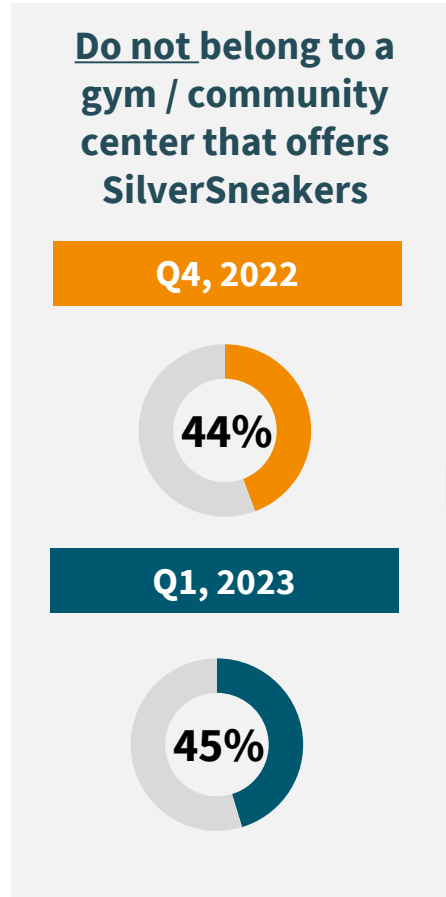


Q8: Please indicate which, if any, of the following **fitness activities** you are currently participating in?

One in four non-gym members continue to cite COVID as a factor for not belonging to a gym

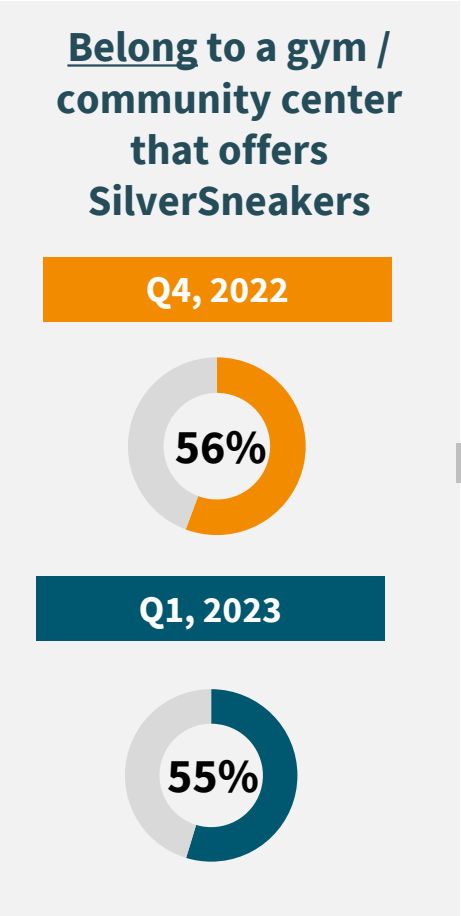
One in six members have chronic conditions or feel awkward going to the gym

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

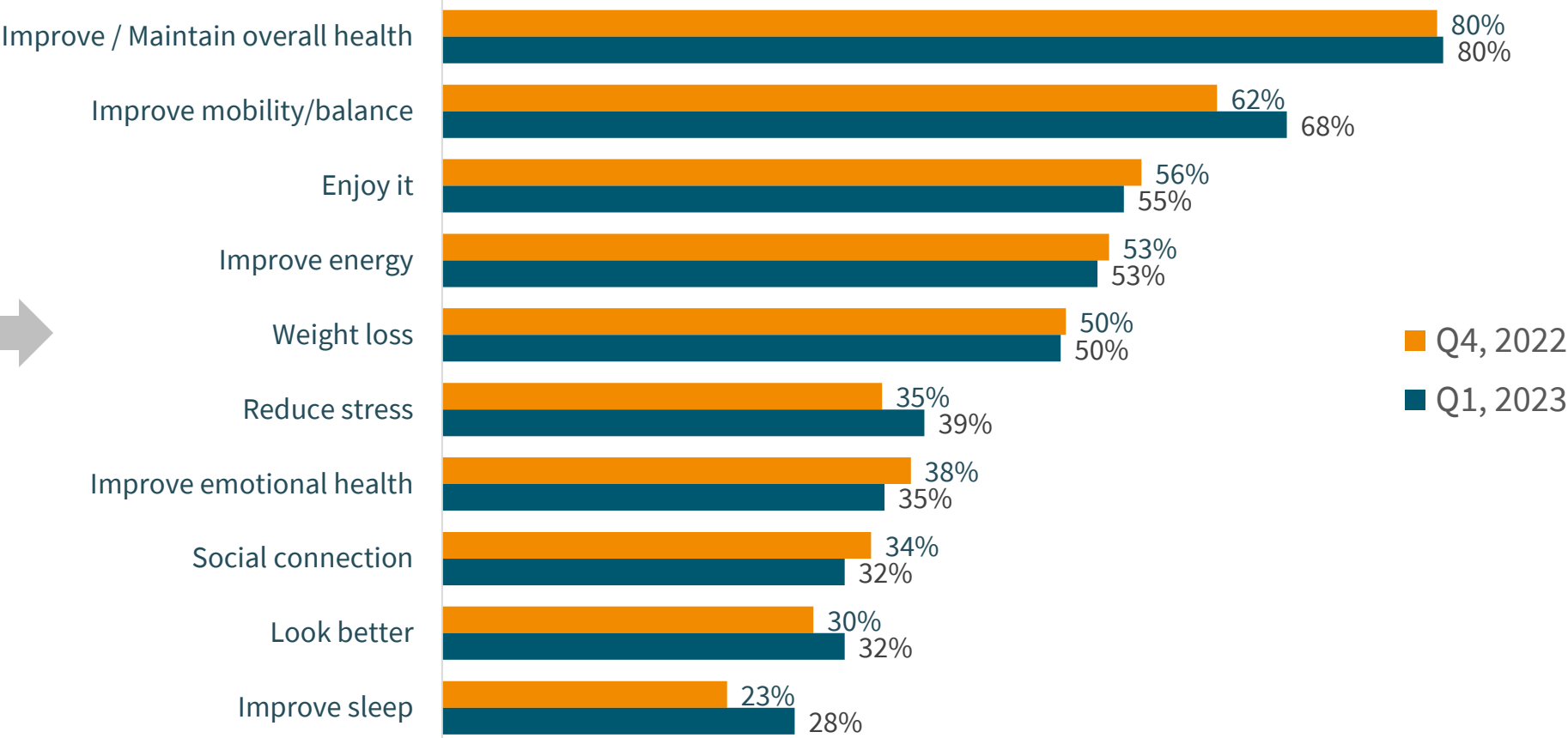


Q9: Are you currently a member of a fitness center, gym, health club or community center that offers SilverSneakers?
 Q12: Which of the following are reasons explain why you are NOT a member of a fitness center, gym, health club or community center that offers SilverSneakers?

Maintaining or improving health and improving balance continue to be the primary reasons for joining a gym that offers SilverSneakers



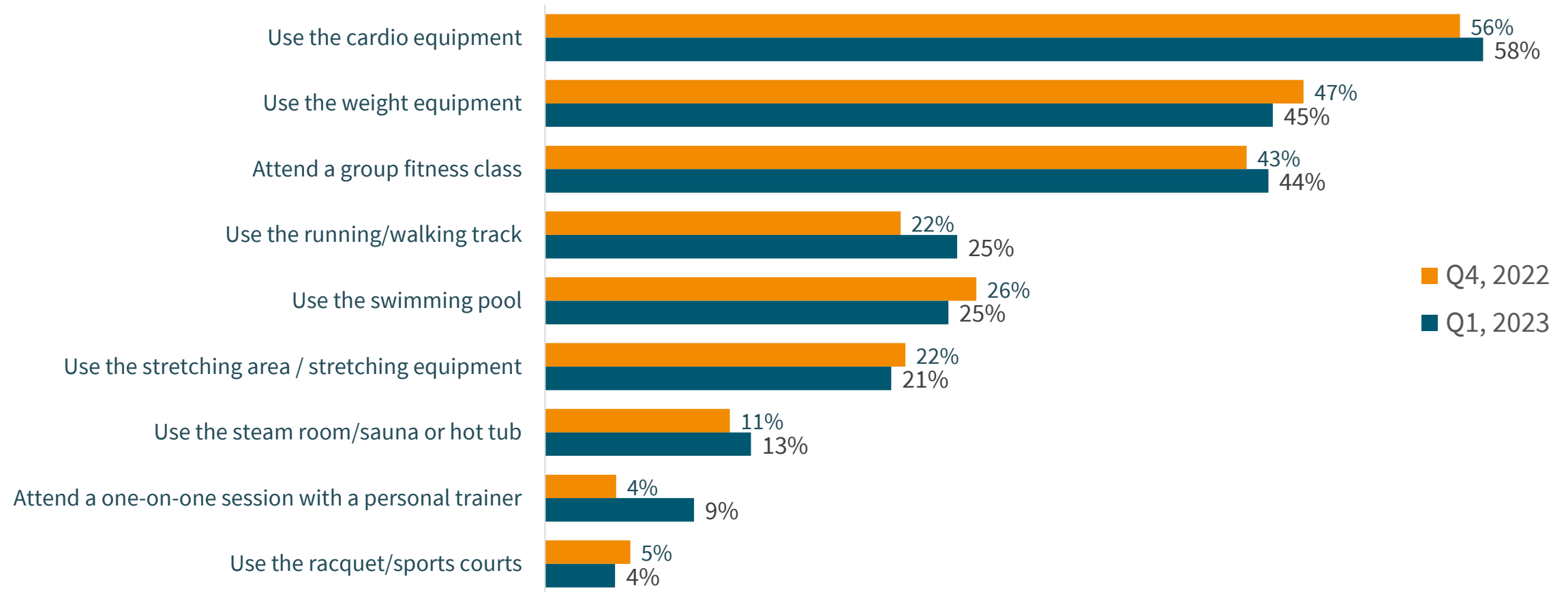
Reasons for joining gym / community center that offers SilverSneakers



Q9: Are you currently a member of a fitness center, gym, health club or community center that offers SilverSneakers?
 Q10: 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

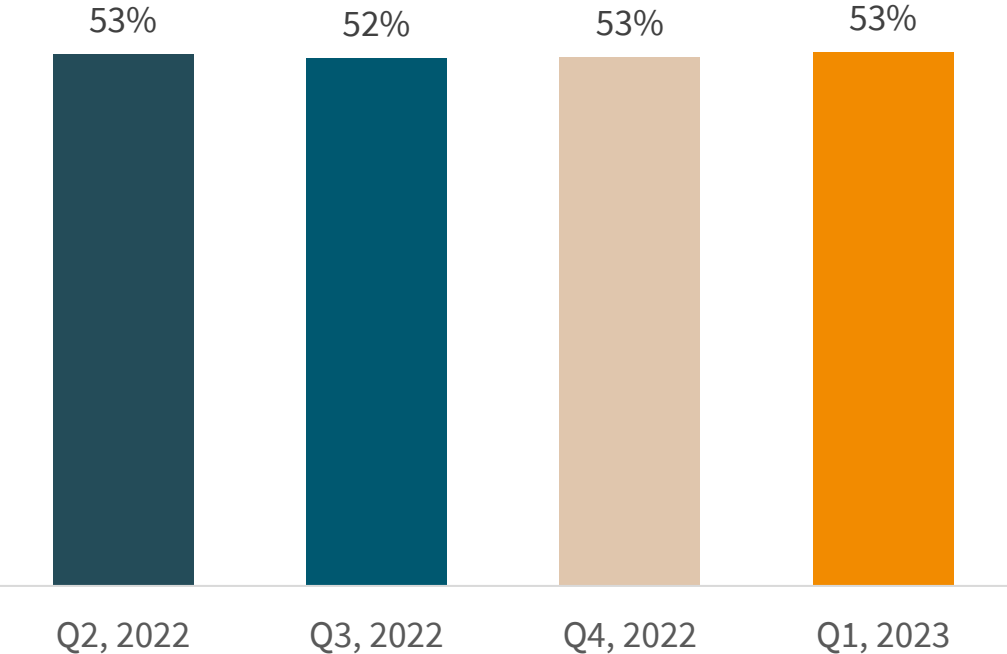


■ Q4, 2022
■ Q1, 2023

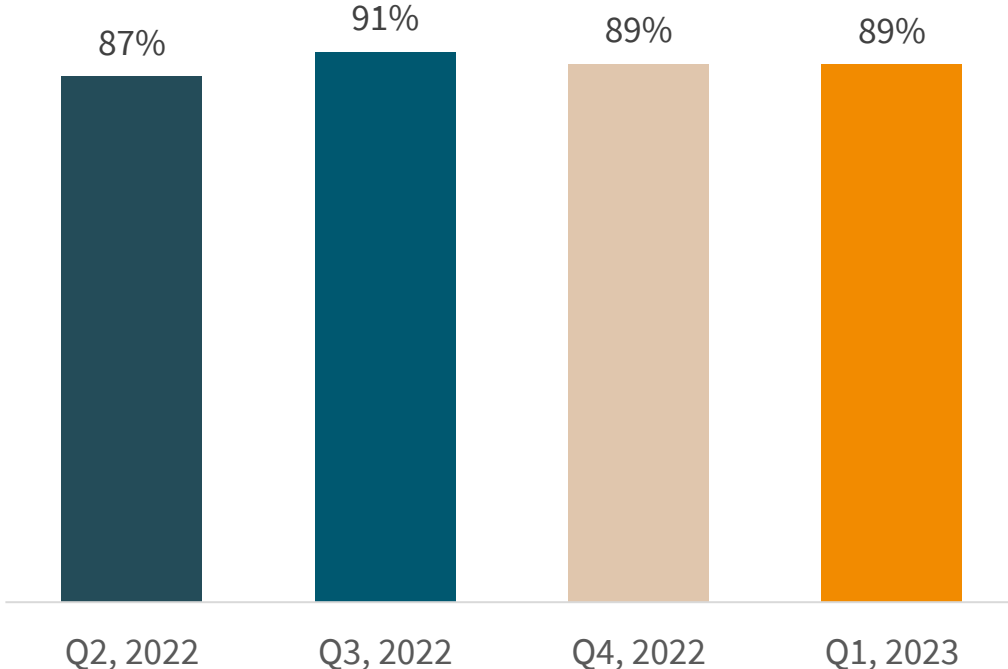
More than half of members remain active participants in SilverSneakers digital offerings

Nine in ten digital users plan to continue utilizing these offerings in the future

Participated in digital exercise offerings, (% 'Yes')



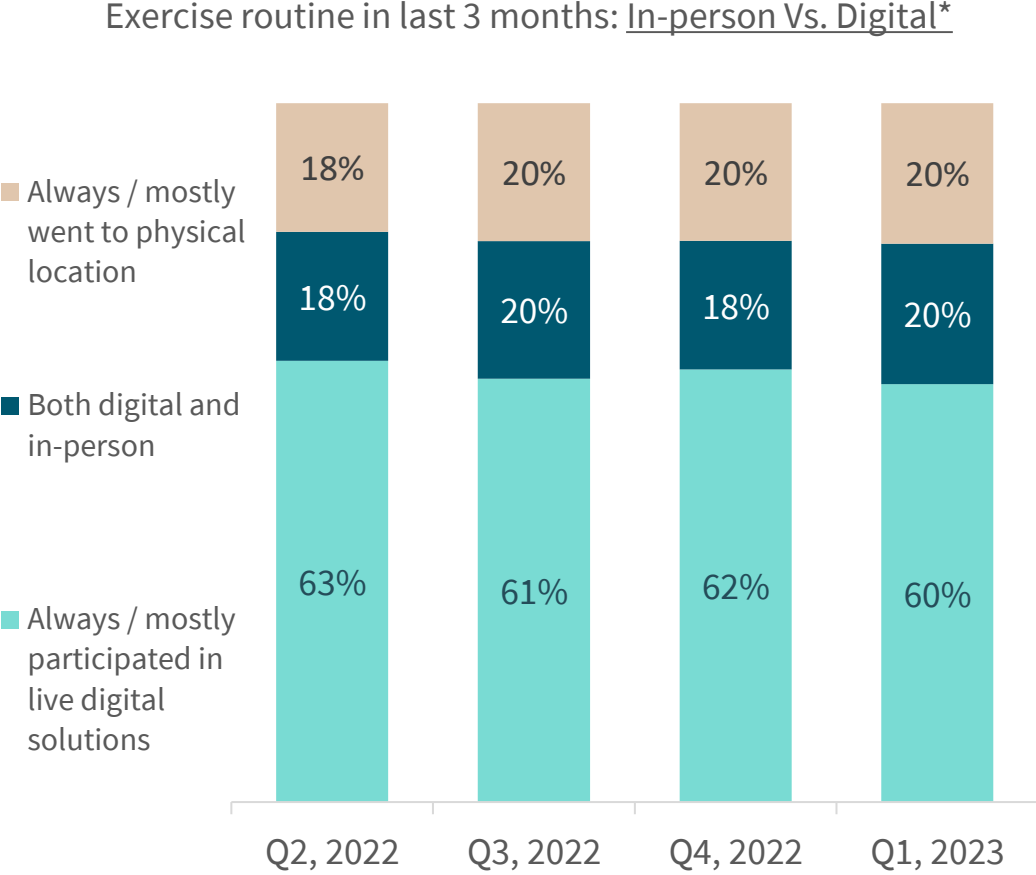
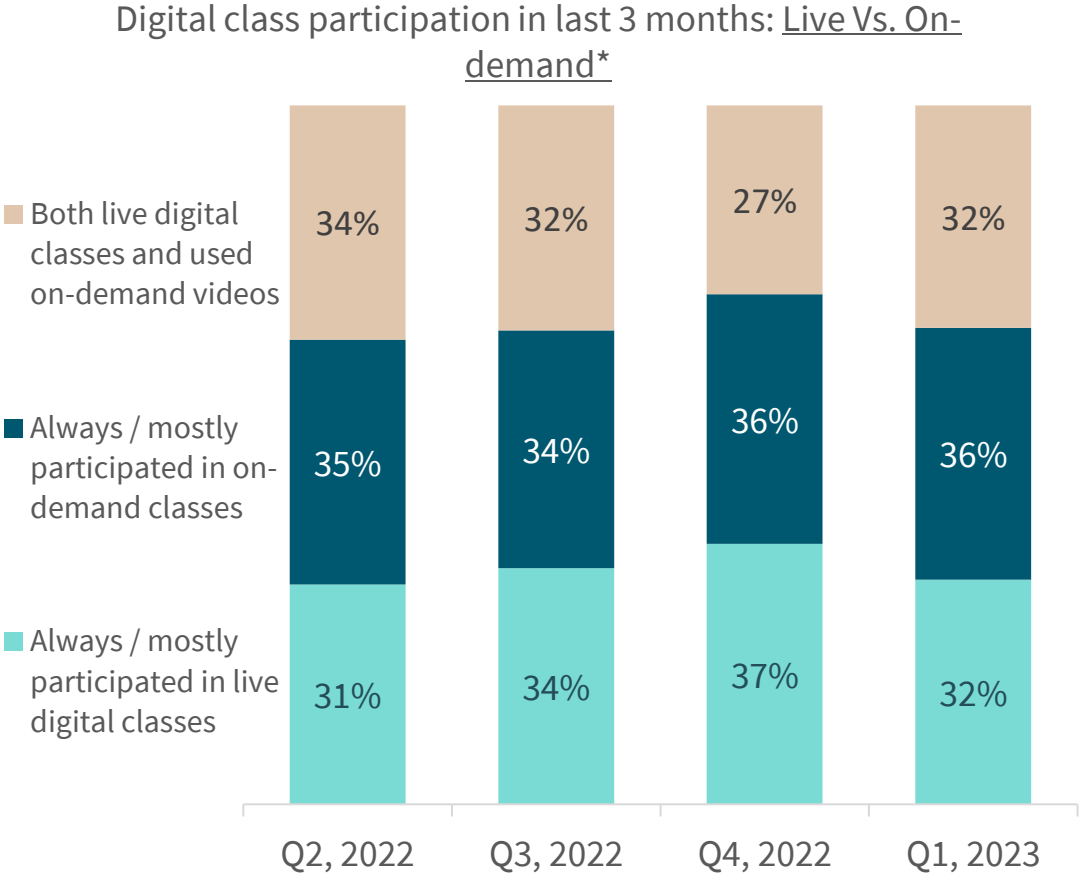
Continue using SilverSneakers digital offerings, (% 'Yes')



Q13: 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?
Q16: Will you continue to use SilverSneakers digital offerings in the next 3 months?

Six in ten of these members continue to engage in digital solutions only

Members' digital preference is equally split between live and on-demand classes or a combination of both

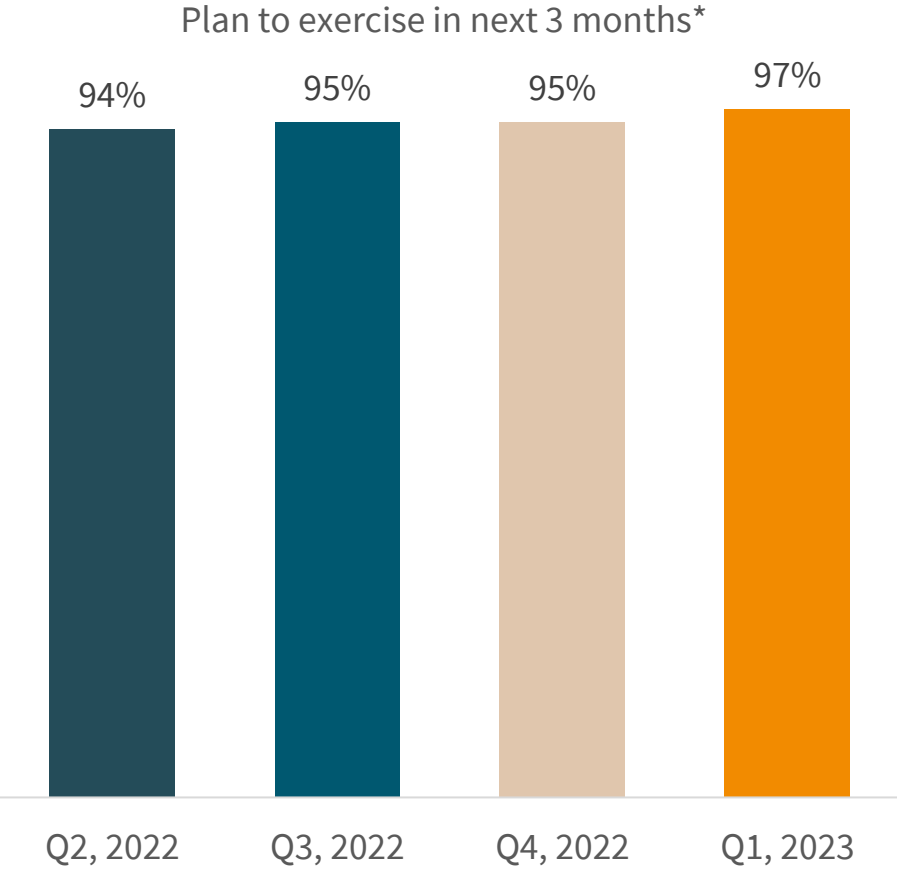
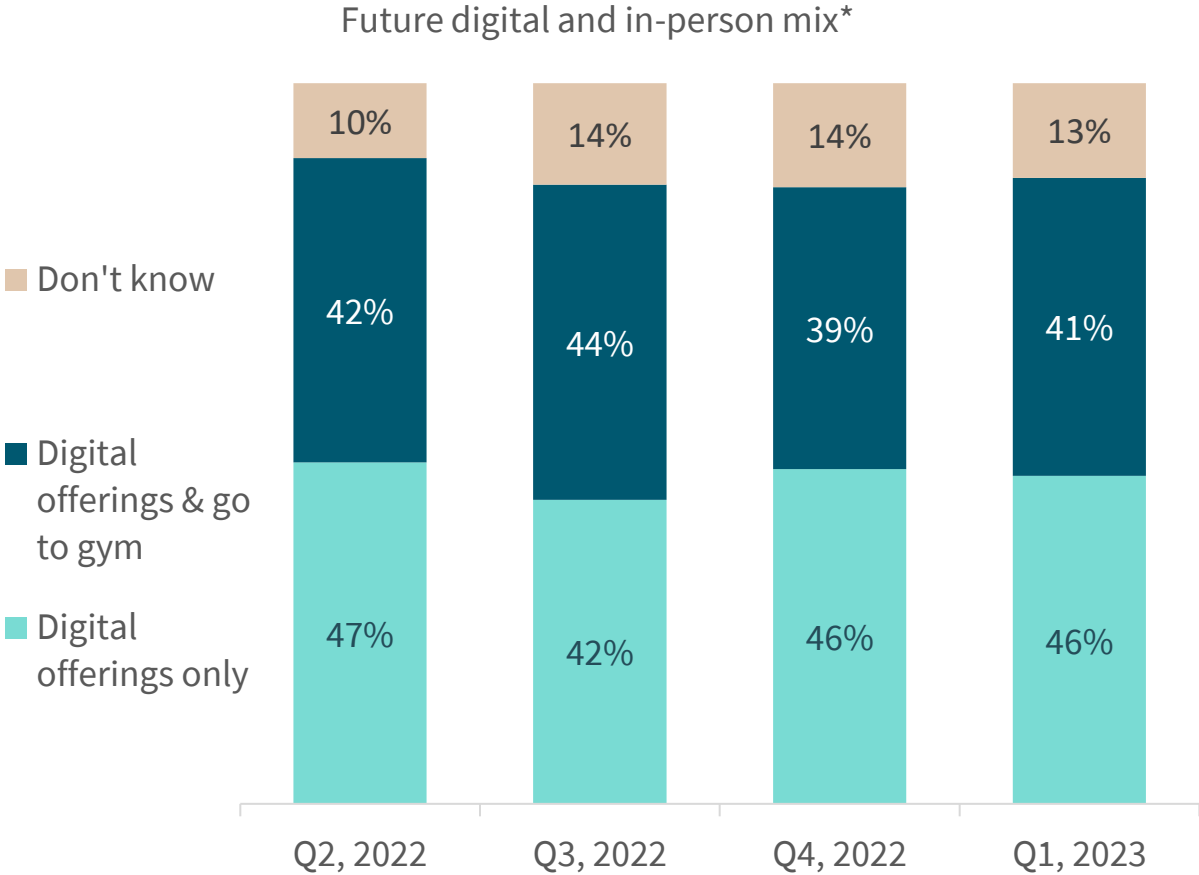


* Among those who have **participated in a digital exercise offering** in last 3 months

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

Q15: Which of the following best describes your fitness/exercise routine in the last 3 months?

However, four in ten do intend to utilize both digital and in-person offerings in the future



* Among those who have participated in a digital exercise offering in last 3 months

Q17: 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?

Q18: Do you plan to exercise in the next 3 months?



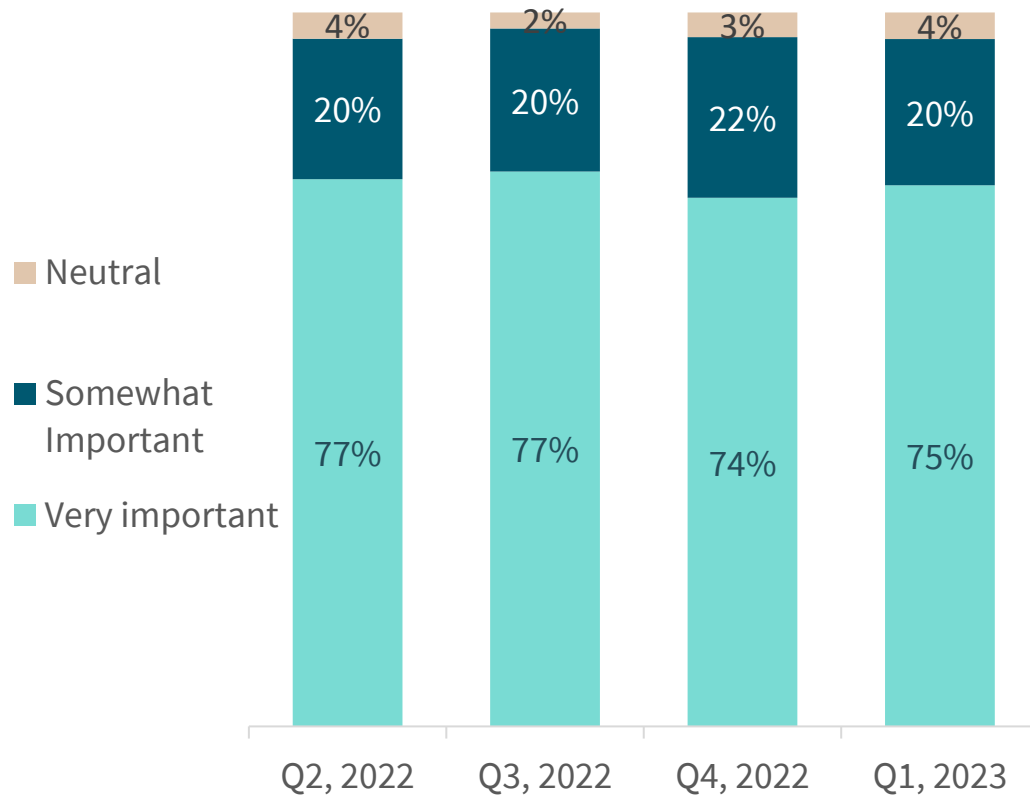
Nutrition

Now, let's talk about food and nutrition

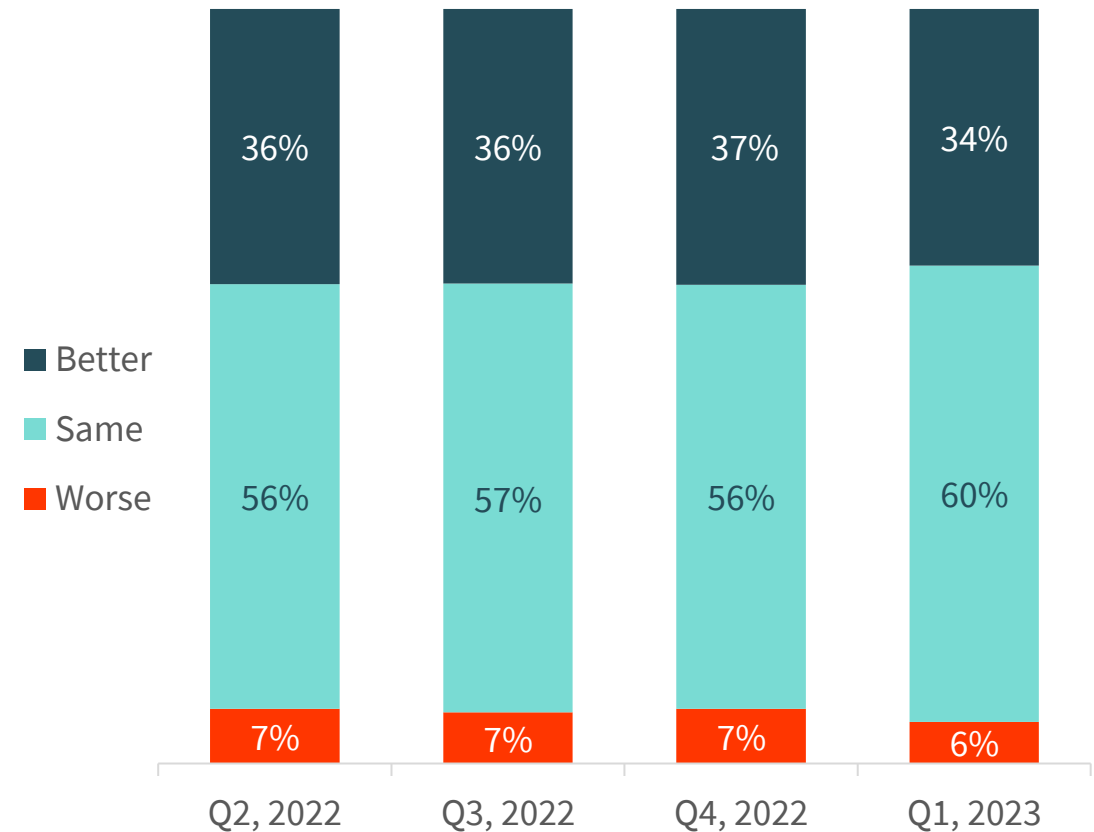


About six in ten members continue to report the same eating habits compared to three months ago

Importance of eating healthy food to one's health*



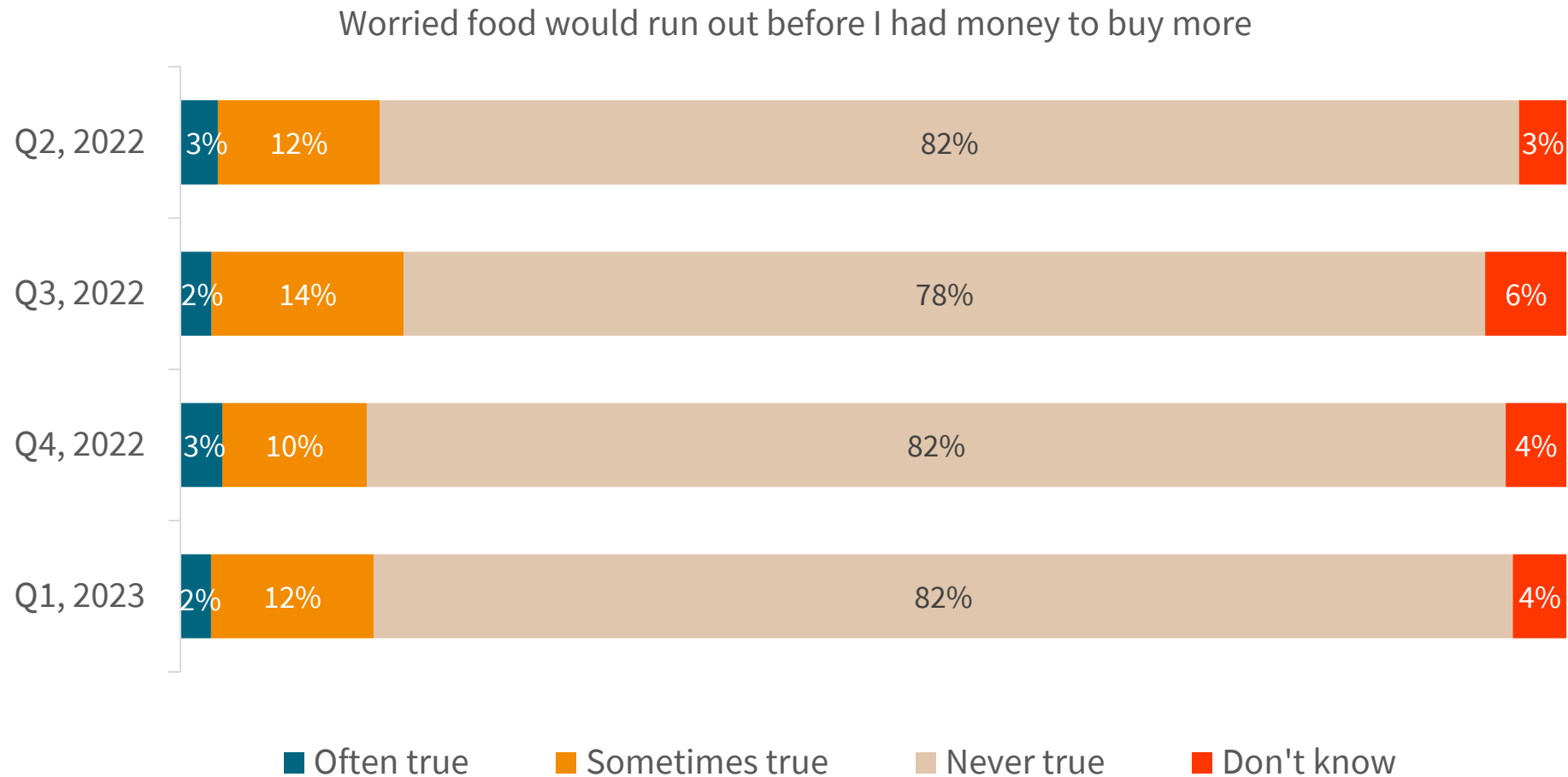
Eating habits compared to 3 months ago*



Q19: How important or unimportant is eating healthy foods to your overall health and well-being?
 Q21: How would you rate your eating habits now compared to 3 months ago?

*Based on a 5-point rating scale

The number of members who are concerned about their own food insecurity remains relatively unchanged from 2022



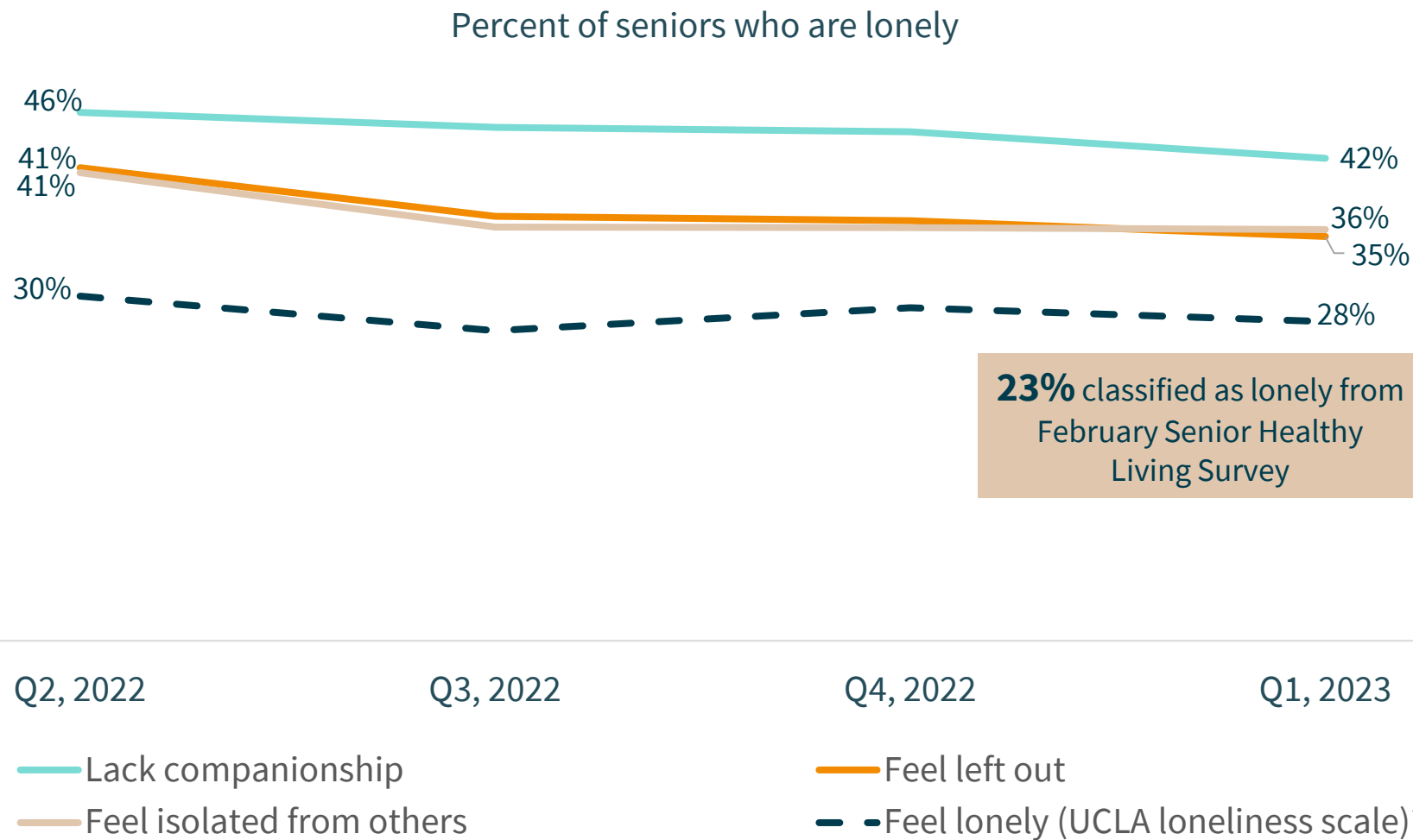


Social Connection

Now, let's talk about social connection



More than four in ten members mention they lack companionship or feel left out some or most of the time

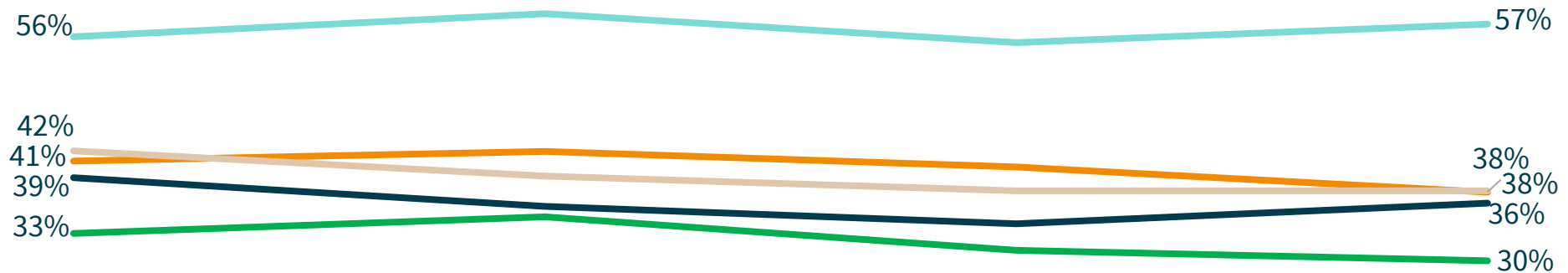


Based on UCLA Loneliness scale. For each question respondents could select hardly ever, some of the time, or often. Score of 3-5 is classified as "Not Lonely" Score of 6-9 is classified as "Lonely"

Engaging with family and friends digitally remains a popular activity among members

About four in ten members continue using a digital platform for exercise classes

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



Q2, 2022

Q3, 2022

Q4, 2022

Q1, 2023

— Socially connecting with friends & family

— Exercise classes

— Meetings (work, clubs, church groups, etc.)

— Learning (hobbies, interests, etc.)

— Medical or therapy appointments



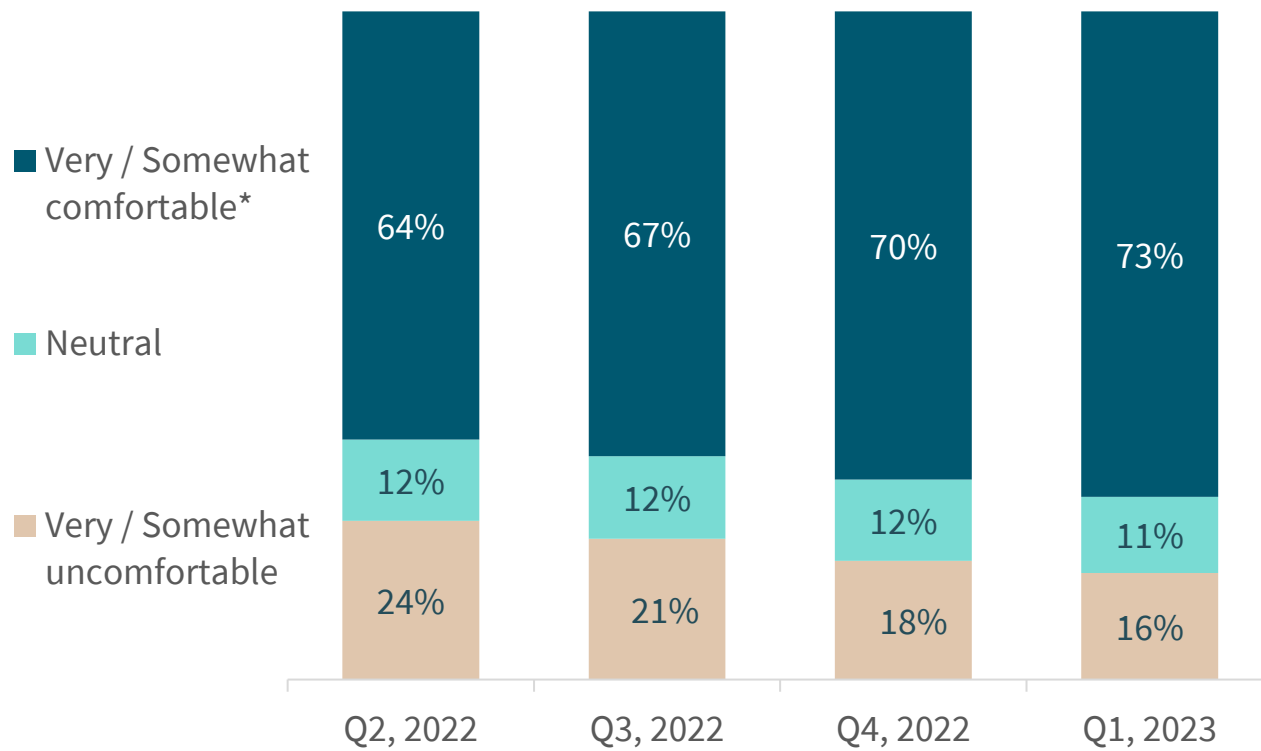
COVID-19 Perceptions & Attitudes

Now, let's talk about COVID-19



Concern for a Coronavirus outbreak continues to wane, while comfort levels socializing in public continue to rise among SSF members

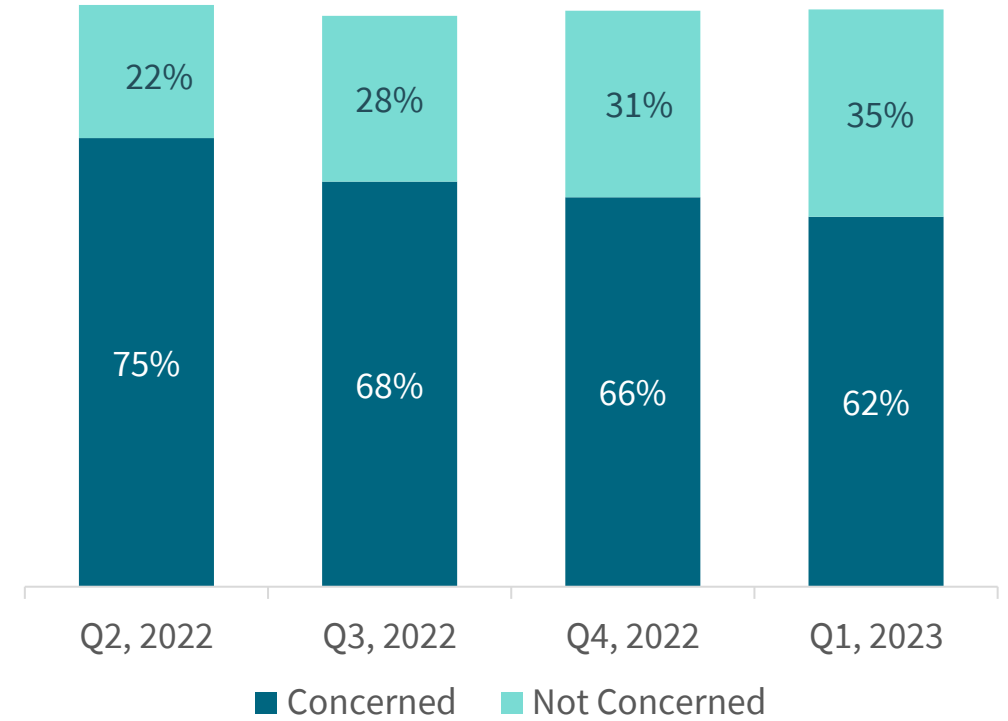
Comfort level socializing in public places*



* Based on a 5-point rating scale

85% are 'Very / Somewhat comfortable' from February Senior Healthy Living Survey

Level of concern for a Coronavirus outbreak**

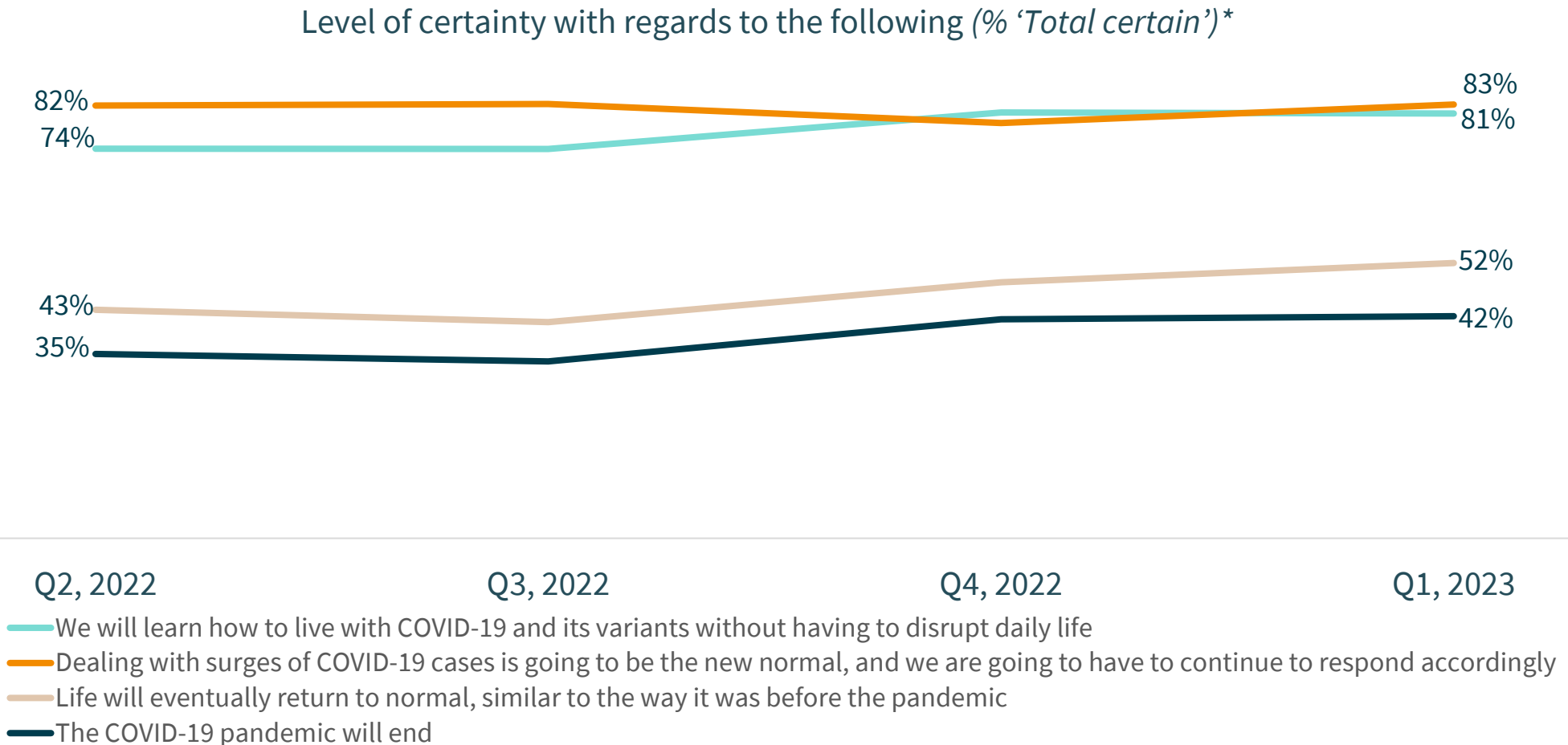


** Based on a 4-point rating scale

Q24: How comfortable are you socializing with friends / family in public places right now?
 Q26: How concerned are you about a Coronavirus outbreak?

For the first time, more than half of SSF members believe life will eventually return normal to the way it was before the pandemic

Four out of five members also mention that they will live with COVID without it affecting daily life



* Based on a 5-point rating scale



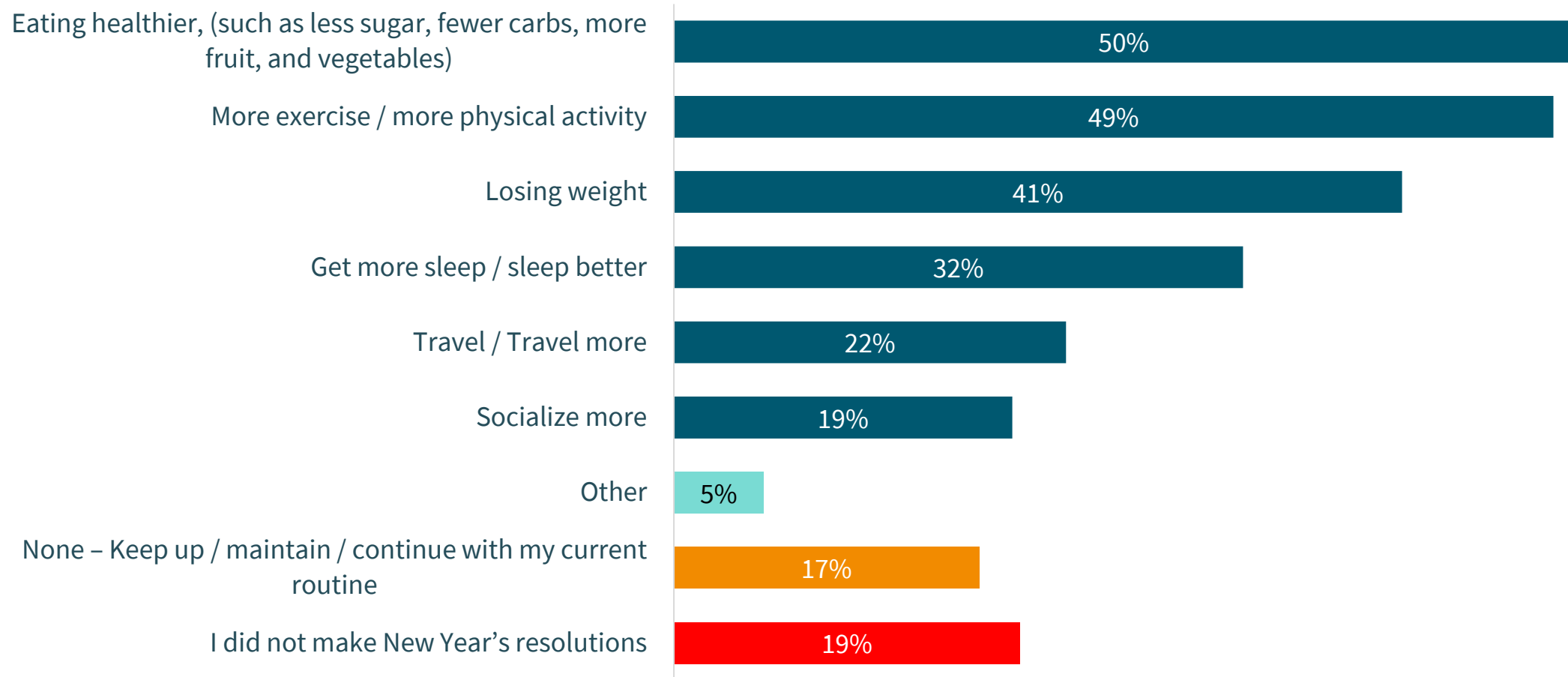
New Year's Resolutions



Now, let's talk about New Year's resolutions that you may have begun or are planning to execute in 2023. Please think specifically about resolutions related to your own health and wellness.

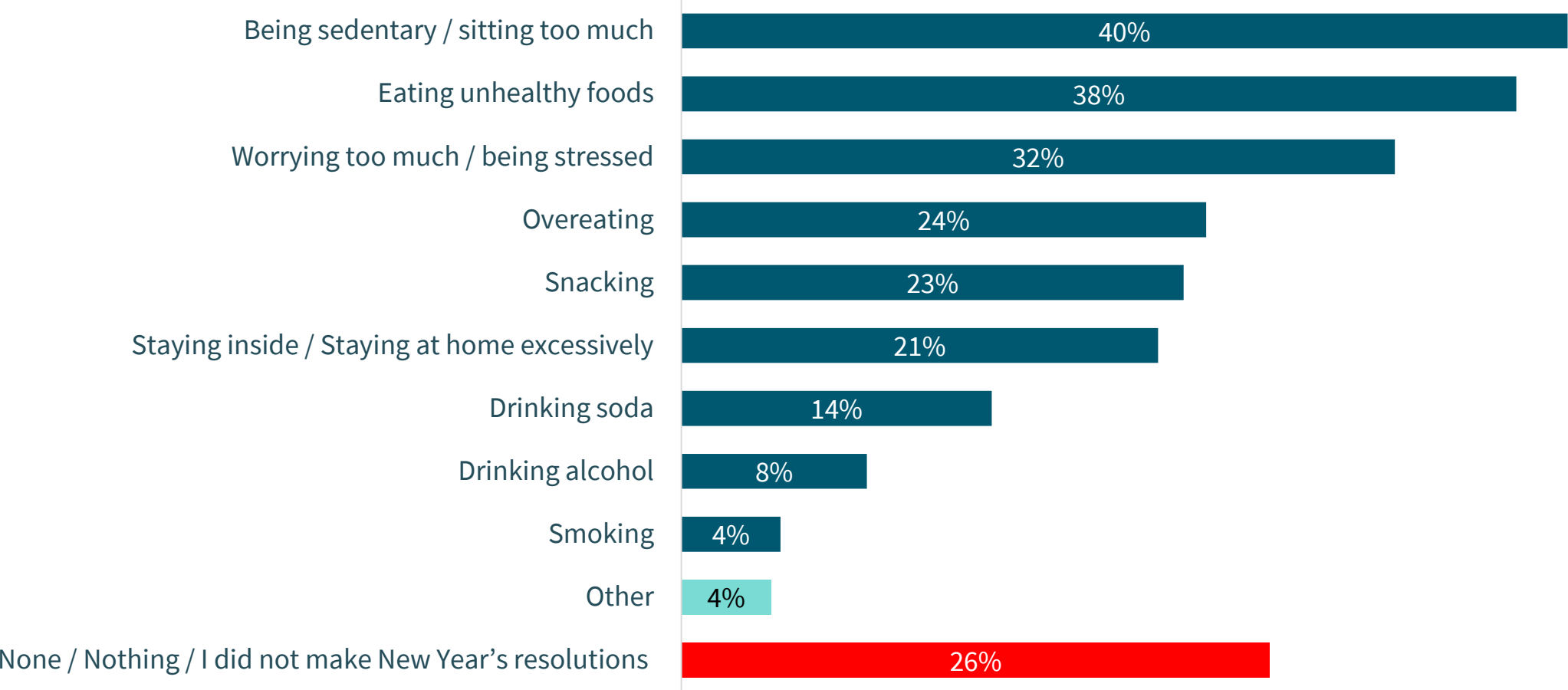
Nutrition, specifically eating healthier heads the list of New Year's resolutions, followed by increased physical activity

New Year's resolutions – *Started or plan to start in 2023*



Conversely, SSF members want to stop eating unhealthy foods and being sedentary

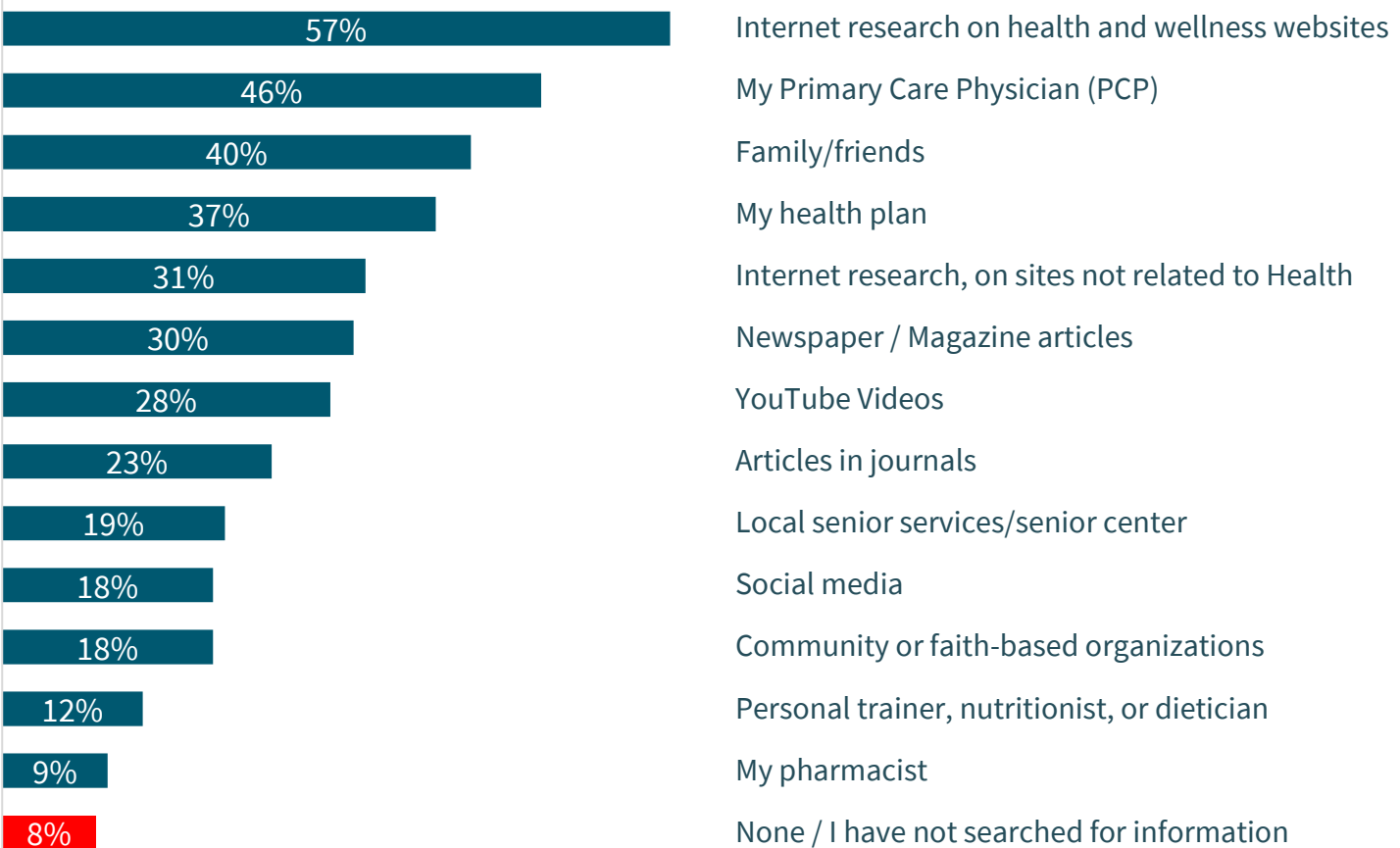
New Year's resolutions – Stopped or plan to stop in 2023



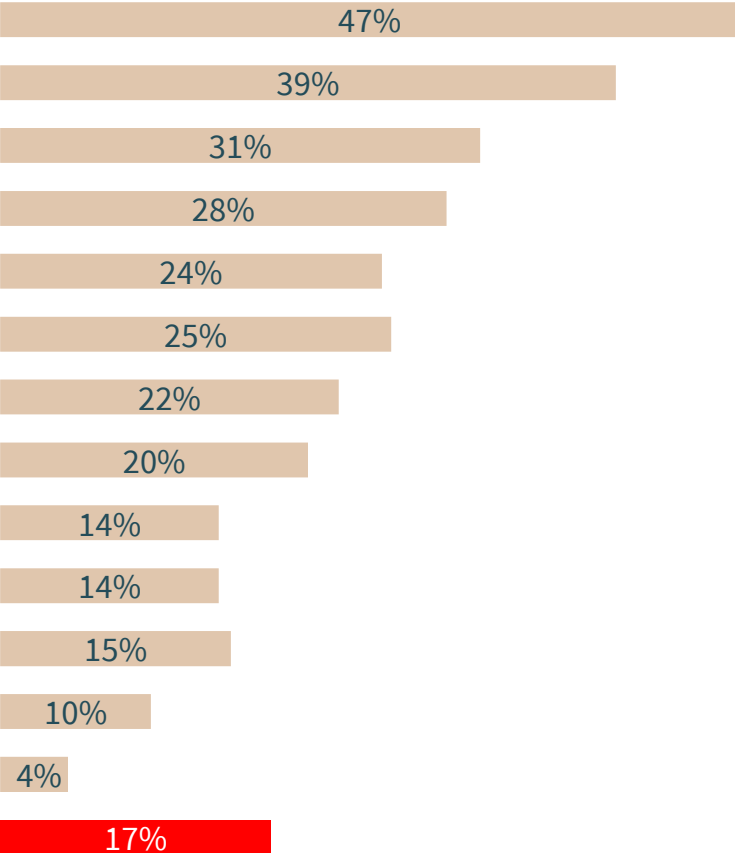
Q29: Which of the following, if any, have you stopped or plan to stop doing in 2023 as it relates to your own health and wellness?

Members tend to search health and wellness websites and consult with their PCP for information about their New Year’s resolutions

Information sources - Learn about **starting** New Year’s resolutions



Information sources - Learn about **stopping** New Year’s resolutions



Q28: Still thinking about the resolutions, you have started or plan to start in 2023, which, if any, of the following information sources have you used or will use to learn more about these resolutions in 2023?
 Q30: Still thinking about the resolutions, you have stopped or plan to stop doing in 2023, which, if any, of the following information sources have you used or will use to learn more about these resolutions in 2023?

Over half of members who have New Year's resolutions believe that setting realistic goals would help them succeed

Tools to help with New Year's resolutions





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