

SilverSneakers Pulse: Quarter 2, 2023

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Tivity Health Consumer Insights

June 2023



Key Takeaways

1

A **higher proportion, (49%)** of SSF **gym goers** attended **in-person** fitness **classes** compared to the last 6 months.

2

Substantially fewer active SSF members, (42%), participated in **digital exercise offerings** compared to anytime in the last year. **Digital exercise users** are also attending **more in-person classes** compared to the previous quarter, **(+7%)**

3

SSF members **eating habits** have remained **similar throughout the year** including the proportion who are concerned about their own food insecurity, (15%)

4

More members feel they **lack companionship**, (48%), **left out**, (42%) and **isolated from others**, (41%), compared to three months ago despite remaining digitally connected with others

5

Concern for a **Coronavirus outbreak** continues to **decrease**, while substantially **more members** believe **COVID-19** will **end** compared to a year ago, **(+13%)**

Objectives & Methodology



Survey via SilverSneakers
Newsletter



645 total responses
received



Fieldwork period:
May 19th – May 24th, 2023

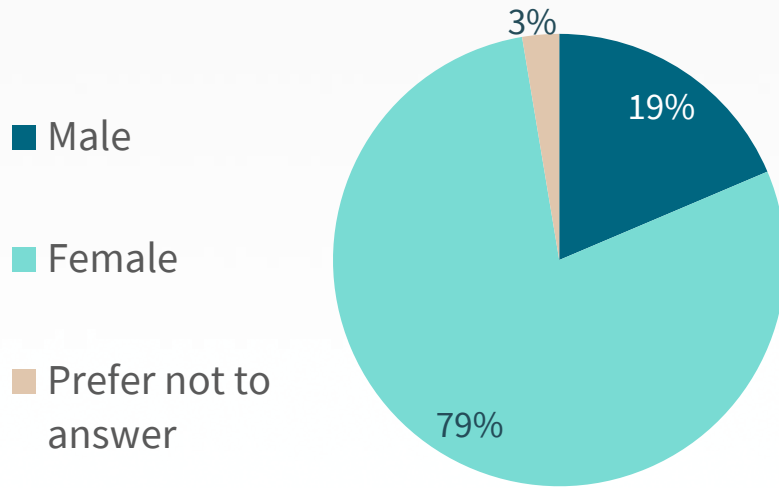
Objectives:

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

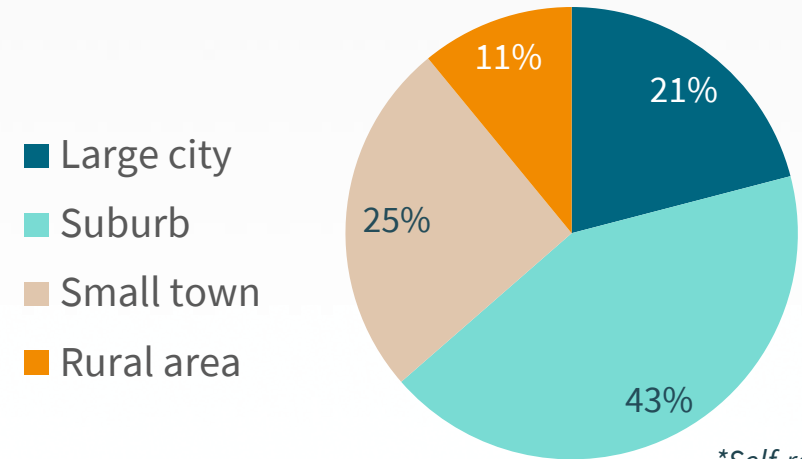
- Current exercise habits
- Current and perceived future digital fitness consumption
- Current nutrition habits
- Food insecurity perceptions
- Impact of COVID-19 on daily life
- Social connection

Respondent Profile – Quarter 2, 2023

Gender



Urbanicity*



*Self-reported

Age



■ Under 65 ■ 65-69 ■ 70-74 ■ 75-79 ■ 80+

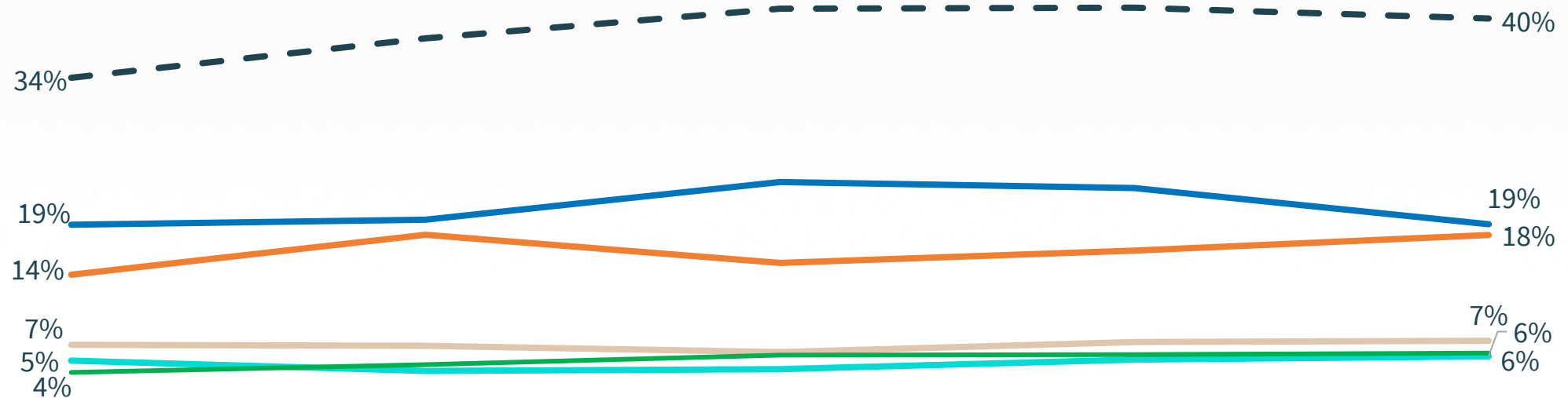
No answer : 2%

Fitness & Physical Activity

Now, let's talk about physical activity

Guided group classes and individual workouts continue to be the most popular activities performed at the gym

Current physical activity - Gym



Q2, 2022

Q3, 2022

Q4, 2022

Q1, 2023

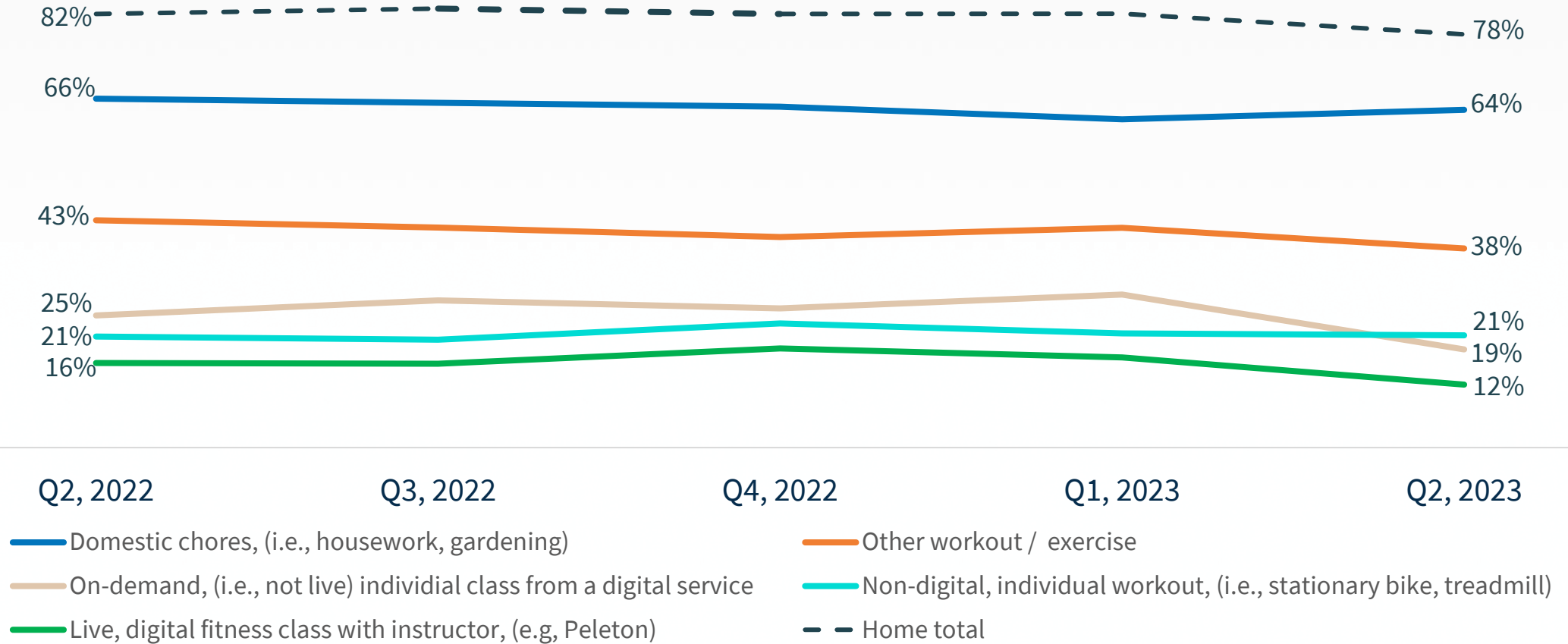
Q2, 2023

- Unguided, individual workout, (e.g., treadmill, free weights)
- Guided, group workout or class, (e.g., Yoga, Water aerobics)
- Guided, group workout or class at studio (e.g., SoulCycle)
- Guided, individual workout, (i.e., personal trainer)
- Unguided, group workout or exercise, (e.g., basketball)
- - Gym total

All physical activity, Q2, 2023: 90%

Domestic chores remain the top physical activity performed at home

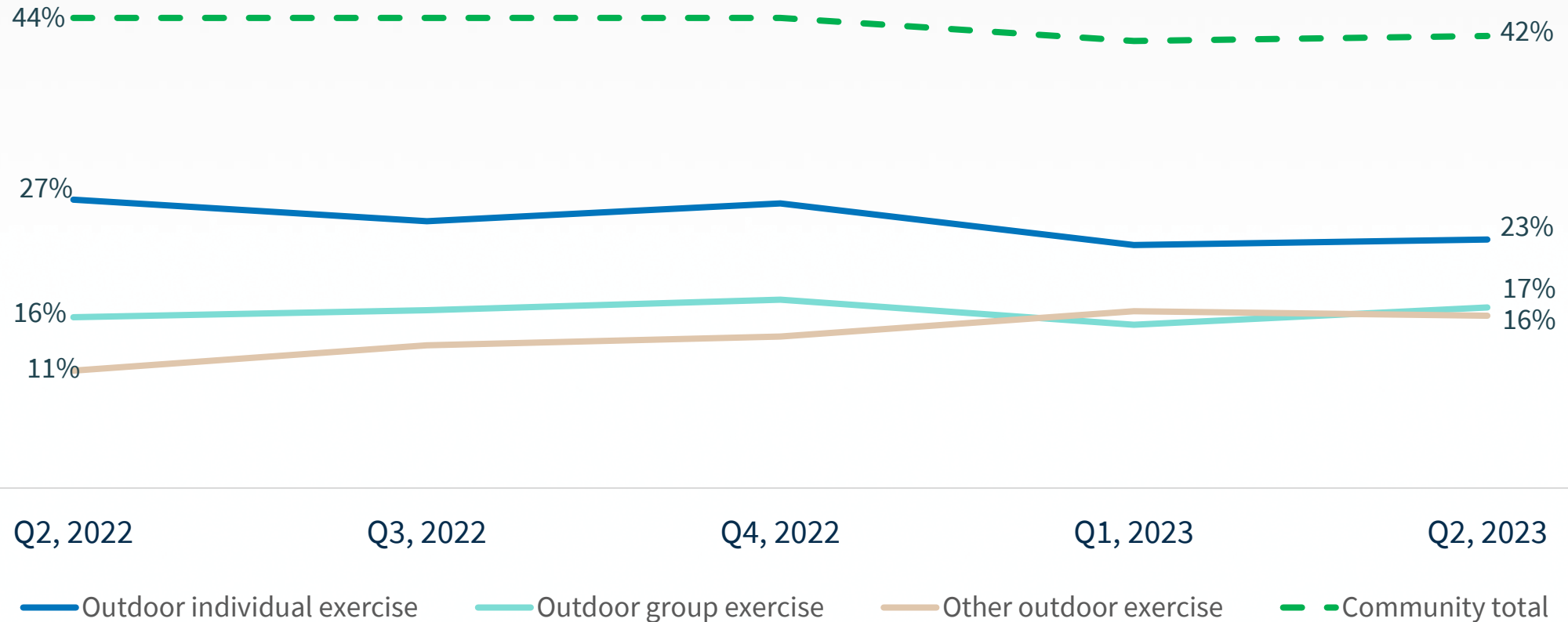
Current physical activity - Home



All physical activity, Q2, 2023: 90%

Throughout the last year, about one in four members participate in outdoor individual exercise

Current physical activity - Community

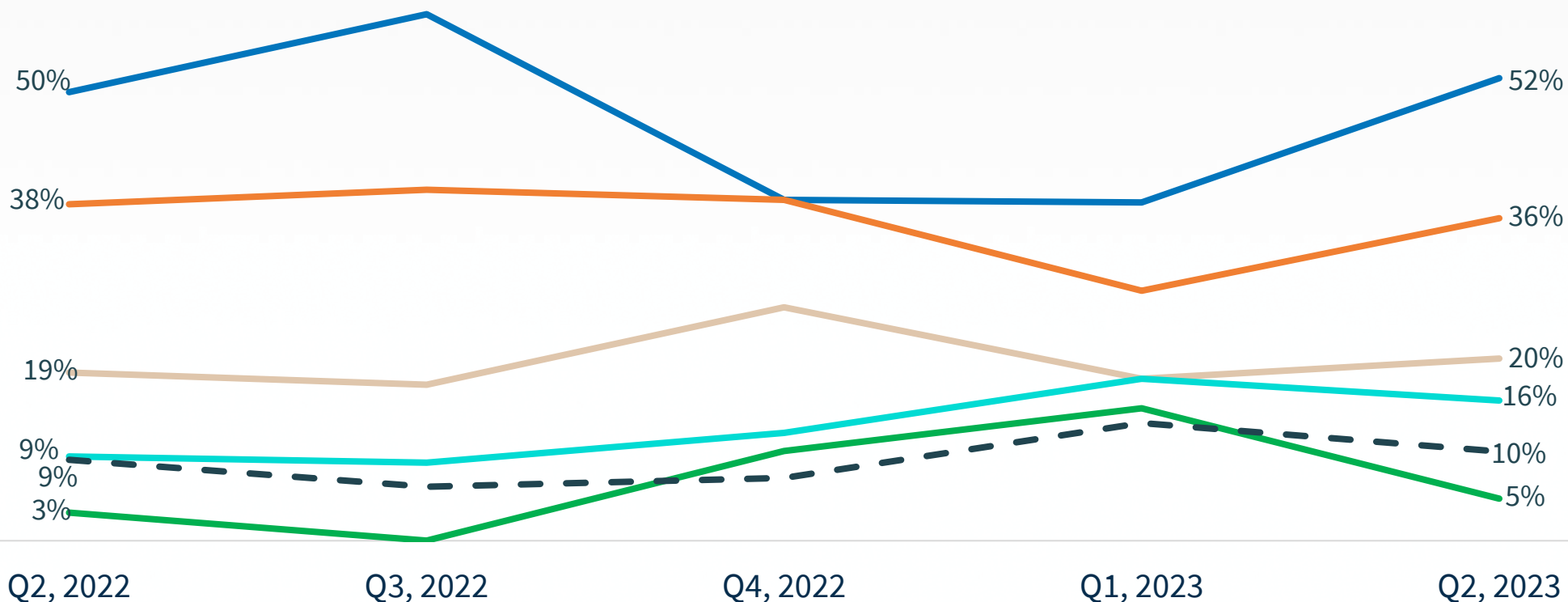


All physical activity, Q2, 2023: 90%

More members cite lack of motivation and chronic pain as reasons for physical inactivity compared to three months ago

One in five members are recovering from illness or surgery

Main reasons for no physical activity*

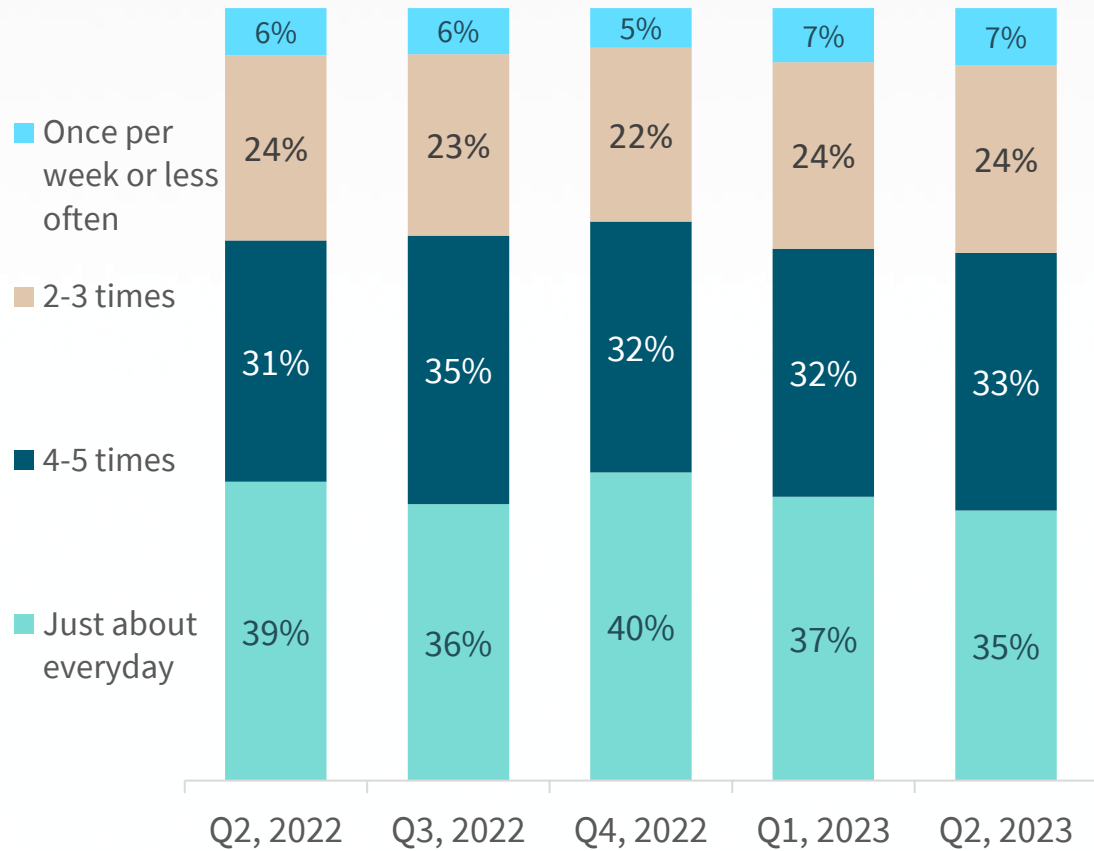


- Not motivated to engage in physical activity
 — Experiencing chronic pain
— Recovering from illness / surgery
- No access to equipment
 — Bad / Cold weather
- - No physical activity

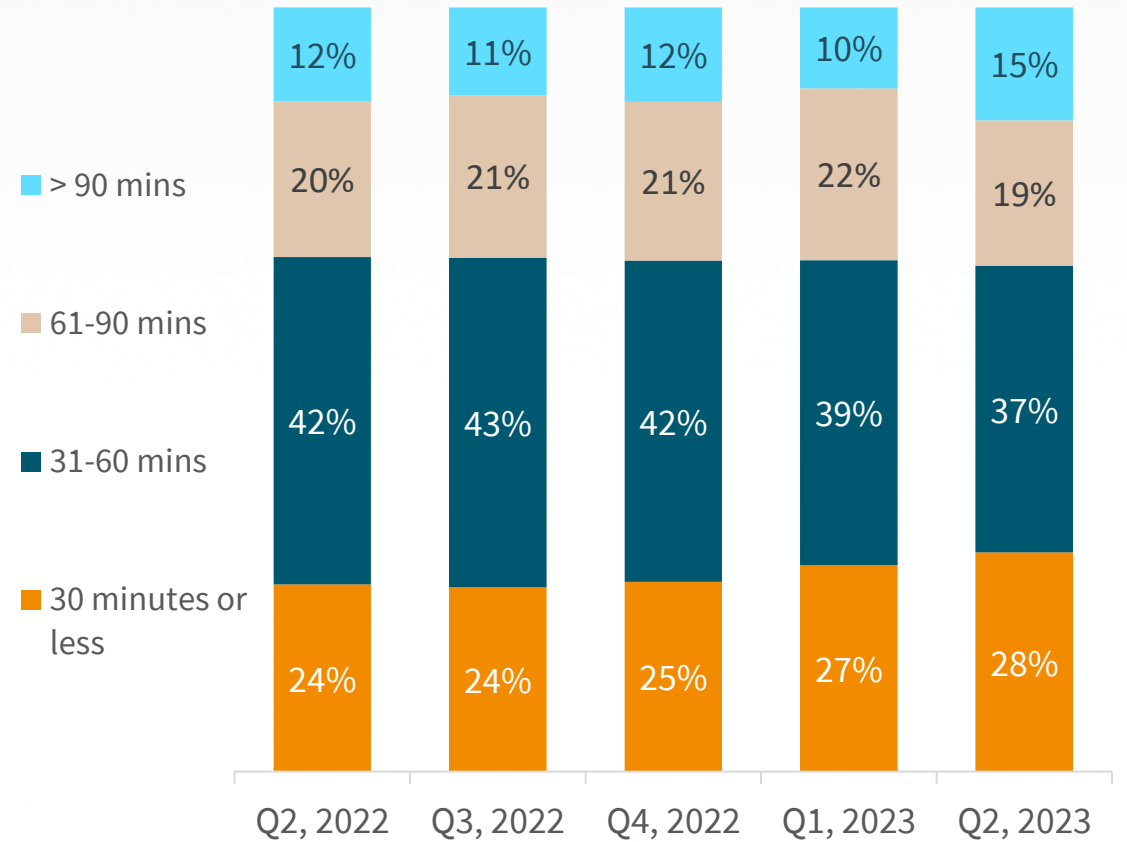
* Caution: Results should be treated directionally due to small base size

About two out of three members are physically active at 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

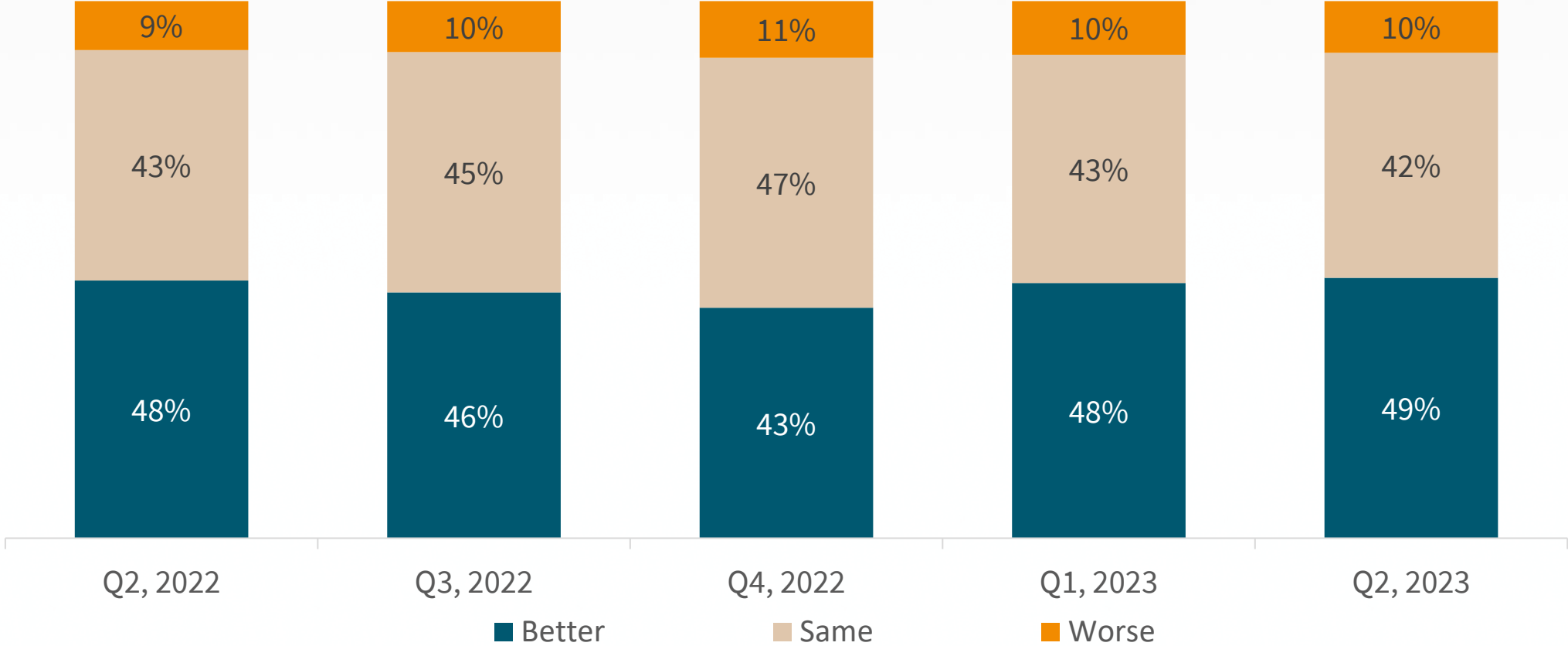


Q3: In the last 3 months, about how many **days per week** on average have you been exercising or doing physical activity?

Q4: In the last 3 months, about how much **time per day** on average do you spend doing exercise or physical activity?

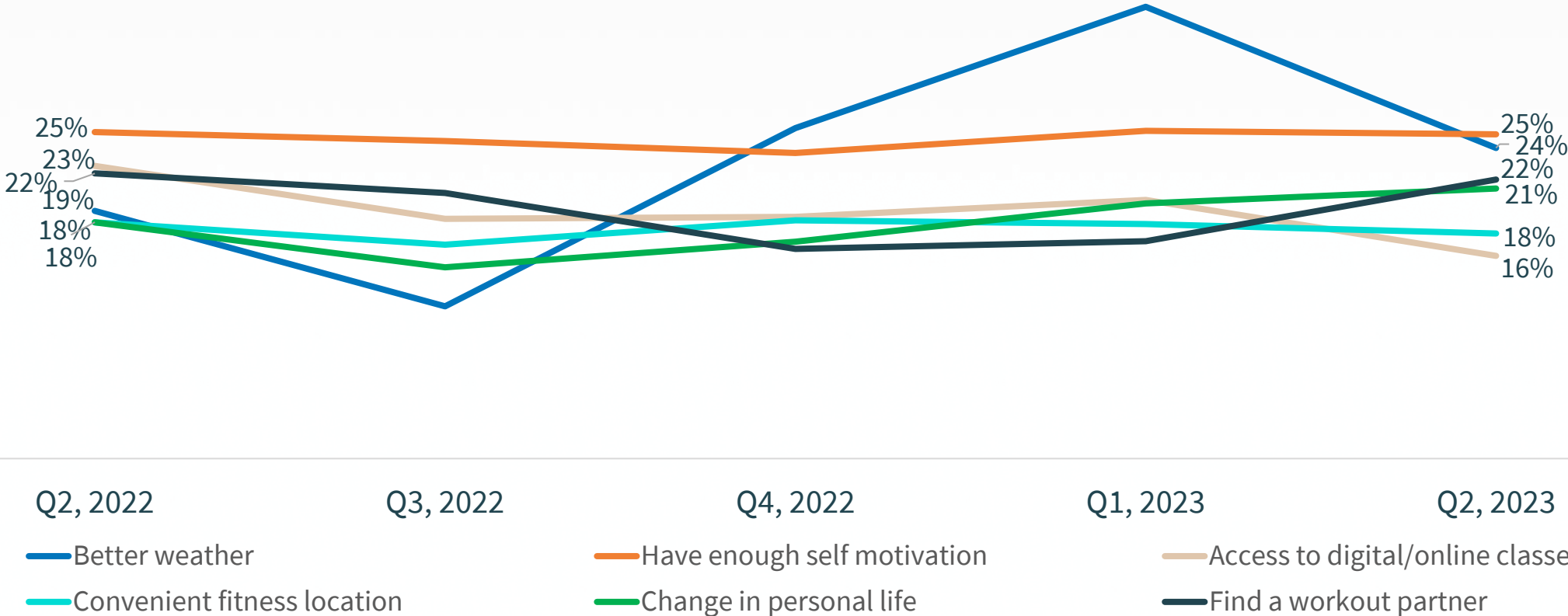
Almost half of members continue to rate their physical activity better than three months ago

Level of physical activity versus 3 months ago



Several factors including self-motivation, better weather and finding a workout partner will help increase members' physical activity

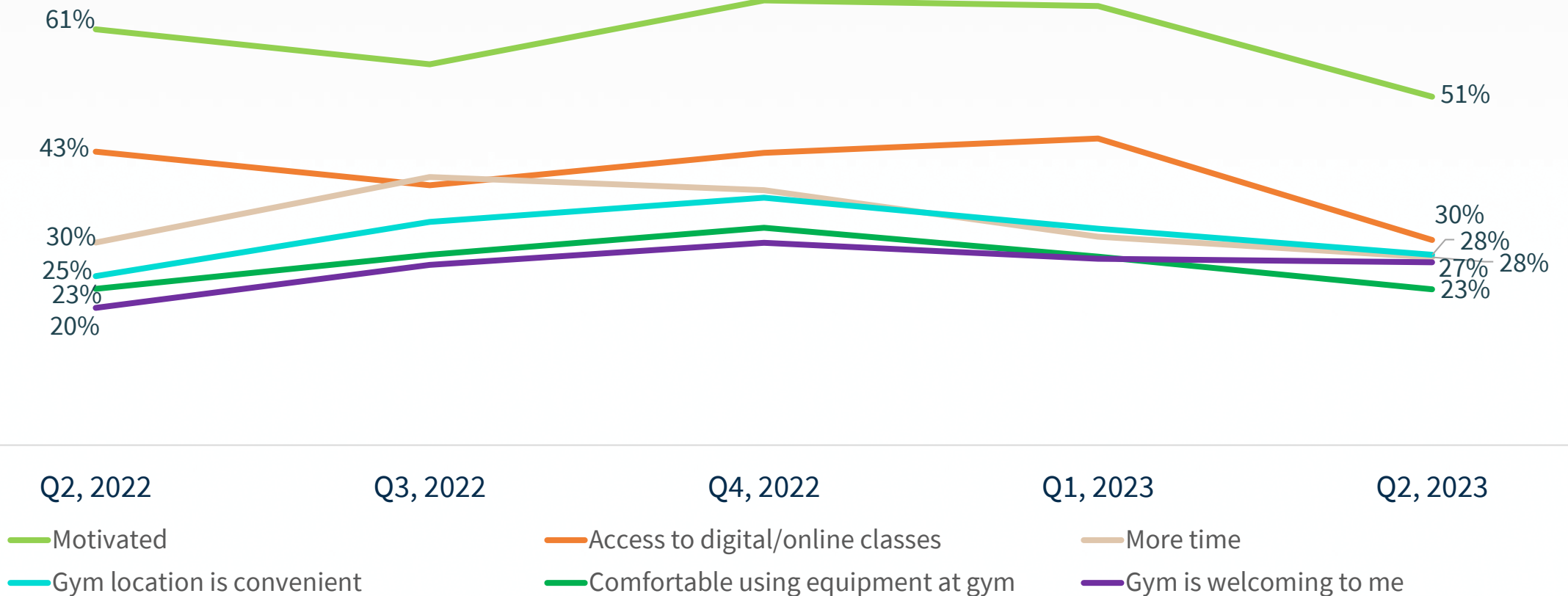
Main factors that will help increase physical activity time*



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

Over half the members mention self-motivation as a key driver for improvement in their physical activity

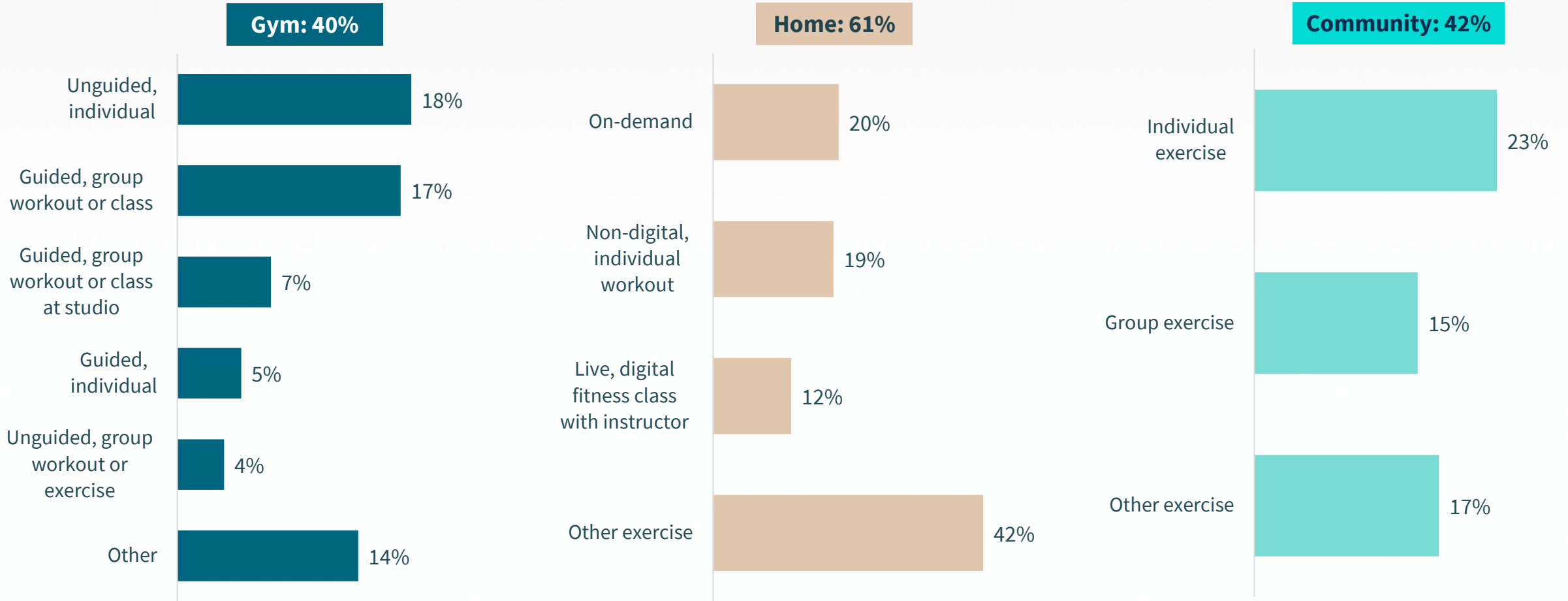
Main reasons for improvement in physical activity



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

Members' fitness regimen across gym and community remain similar, physical activity at home continues to dominate

Current fitness activity

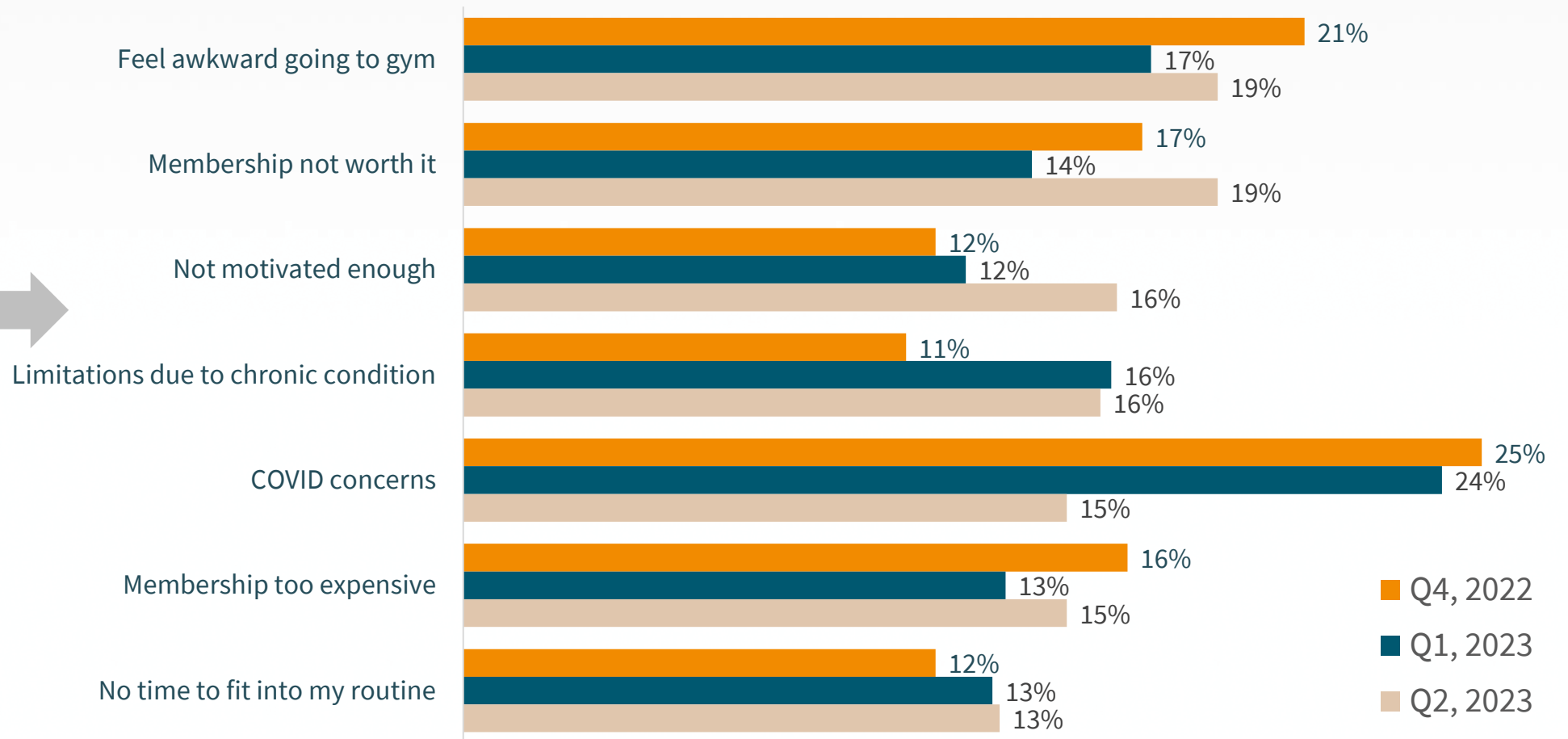
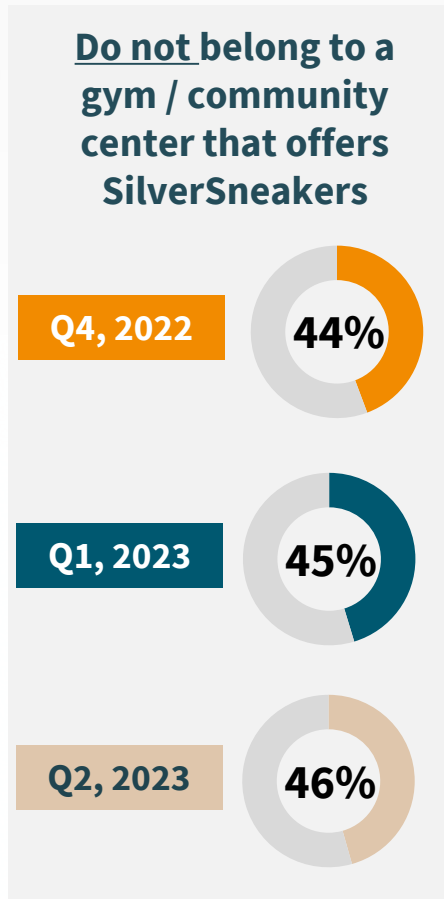


All fitness activity, Q2, 2023: 86%

Substantially fewer members cite COVID as a factor for not belonging to the gym compared to three months ago

One in five members feel awkward going to the gym

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



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

Belong to a gym / community center that offers SilverSneakers

Q4, 2022

56%

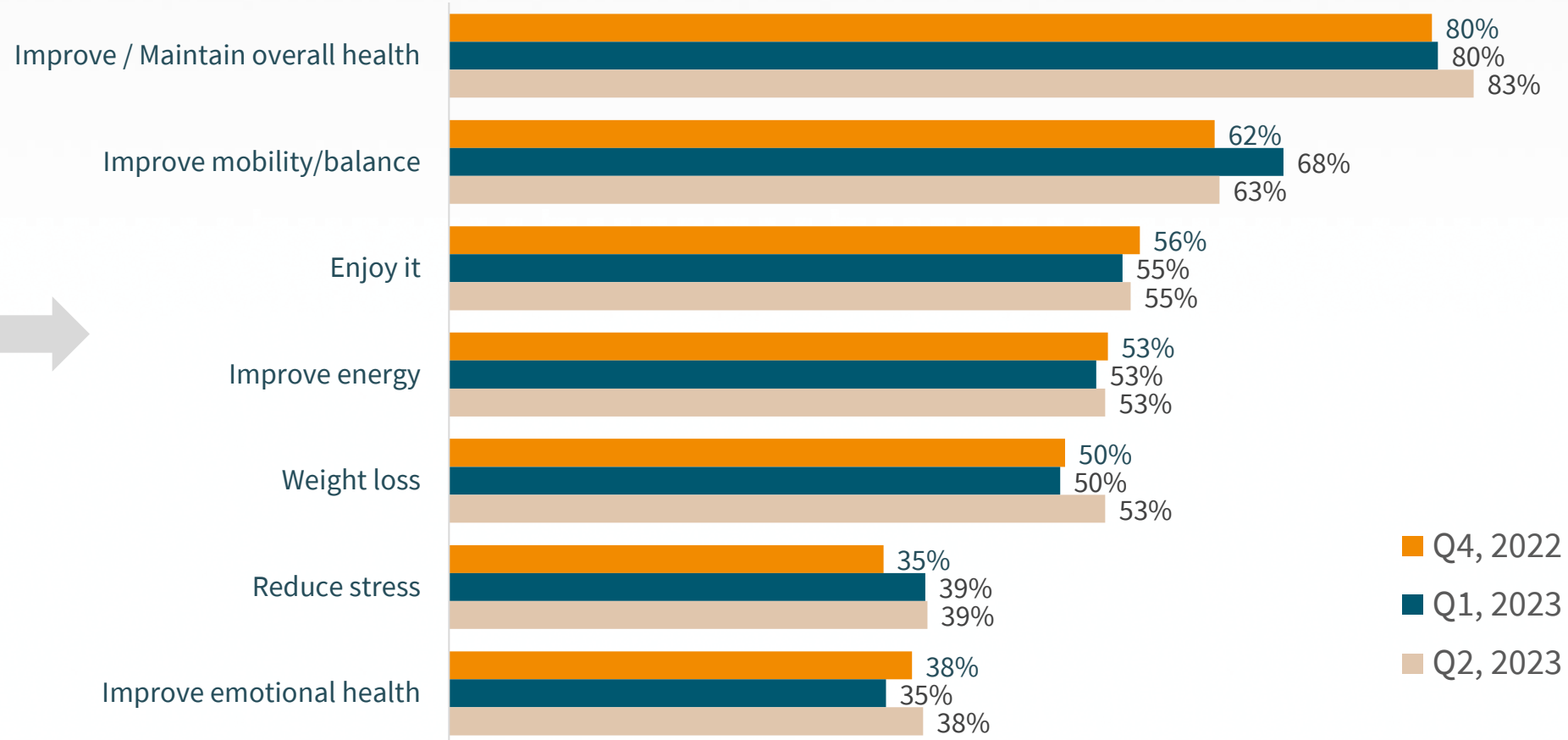
Q1, 2023

55%

Q2, 2023

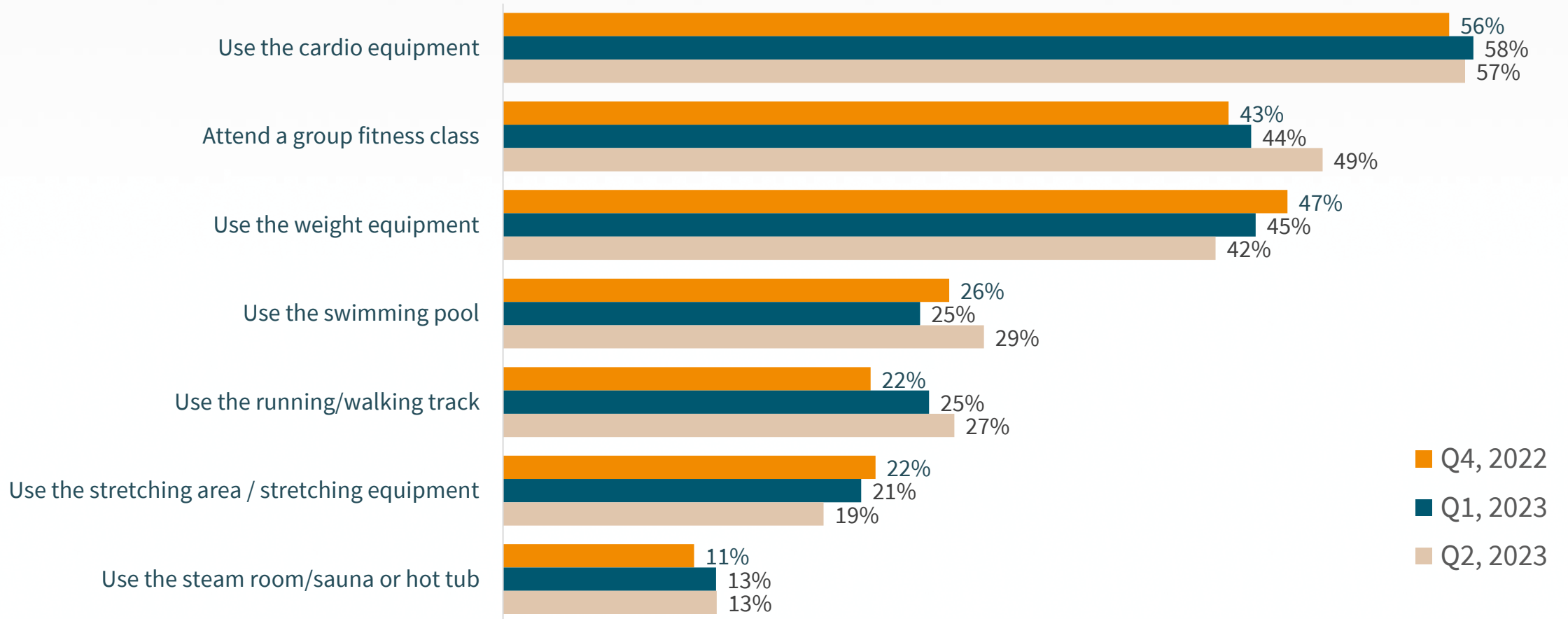
54%

Main reasons for joining gym / community center that offers SilverSneakers



Most gym goers continue using the cardio equipment, while almost half attend a group fitness class

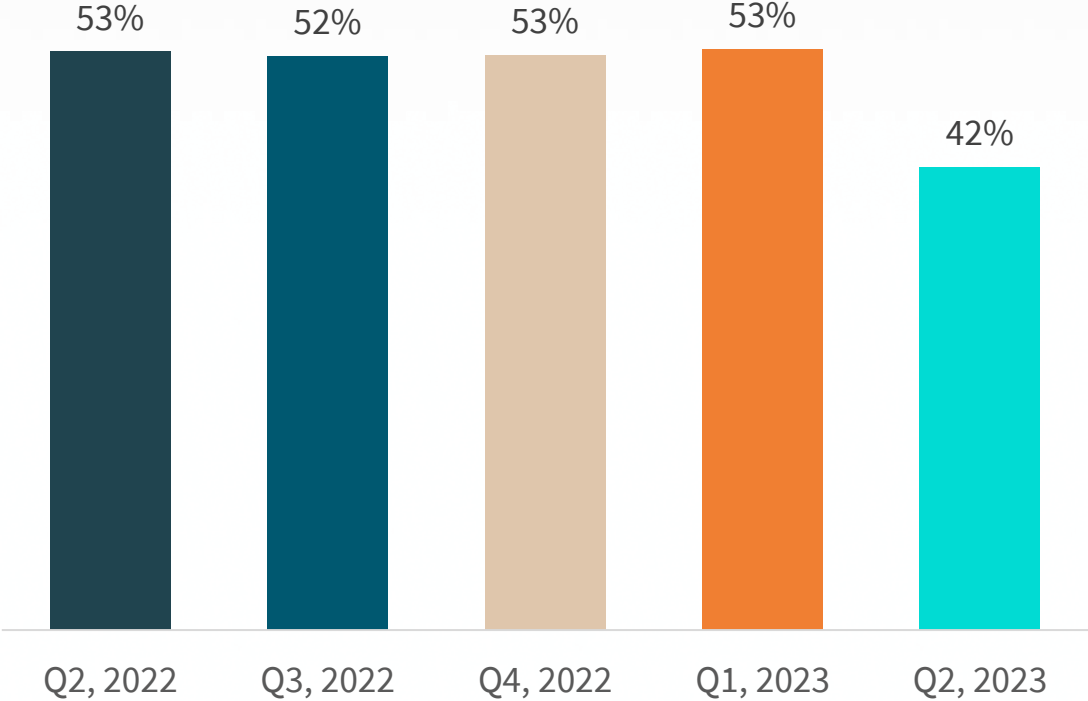
Activities participated at gym / community center that offers SilverSneakers



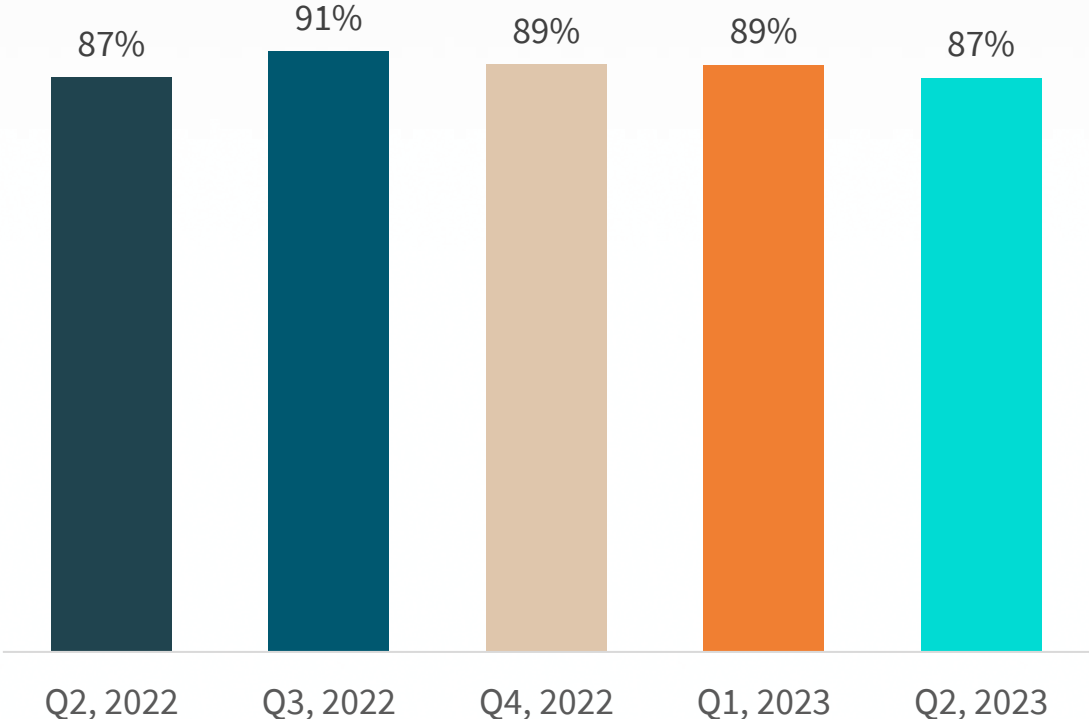
The proportion of members active in SilverSneakers digital offerings declined substantially from three months ago

Most digital users who are active plan to continue utilizing these offerings in the future

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



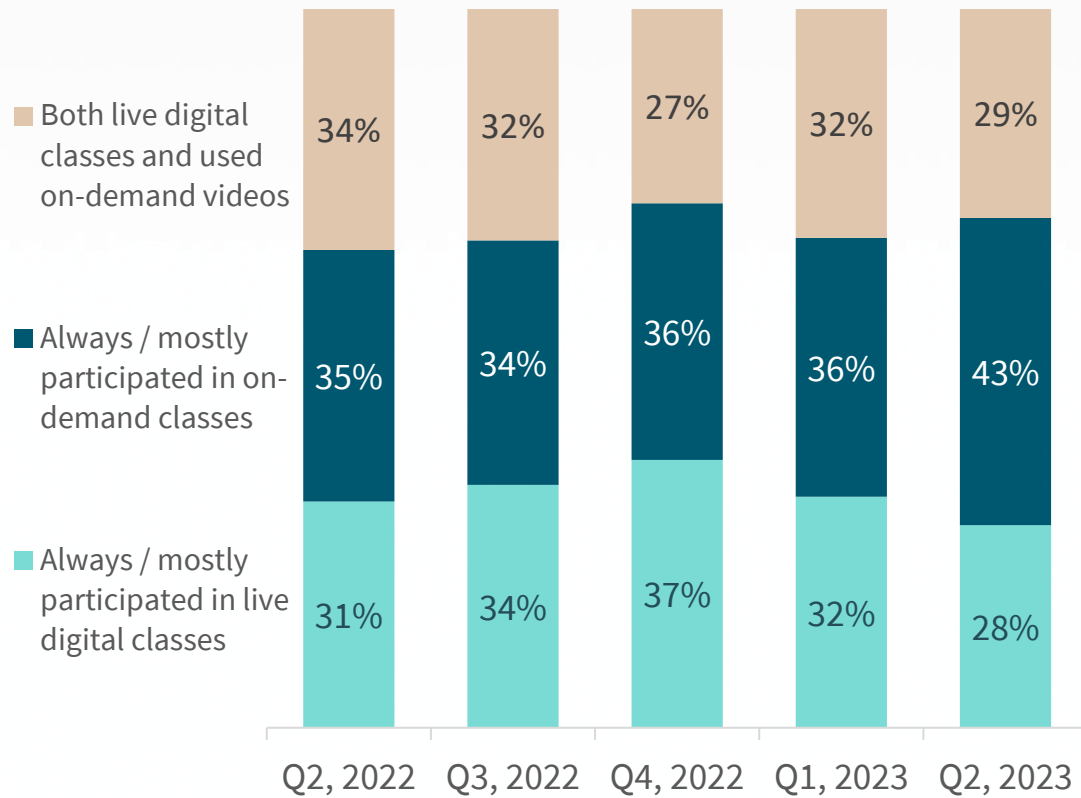
Continue using SilverSneakers digital offerings, (% 'Yes')



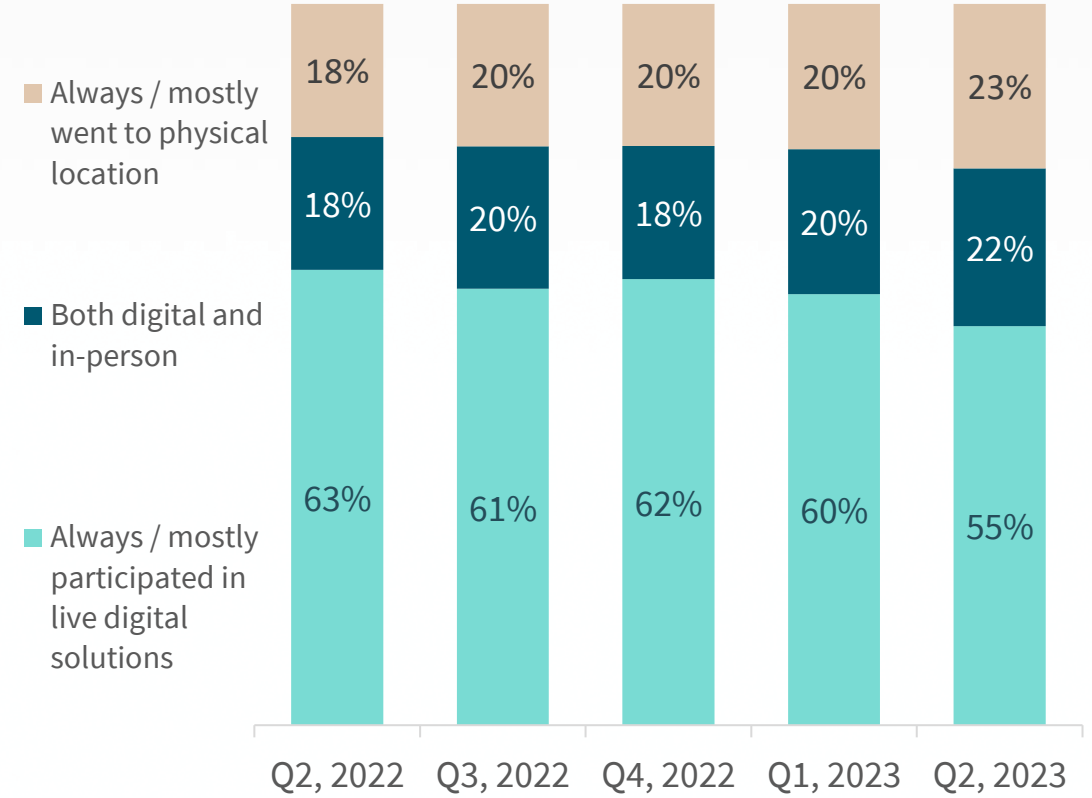
More of these digital users are also attending in-person classes compared to anytime in the last year

On-demand classes have gained in popularity over live classes in the last 3 months

**Digital class participation in last 3 months:
Live Vs. On-demand***

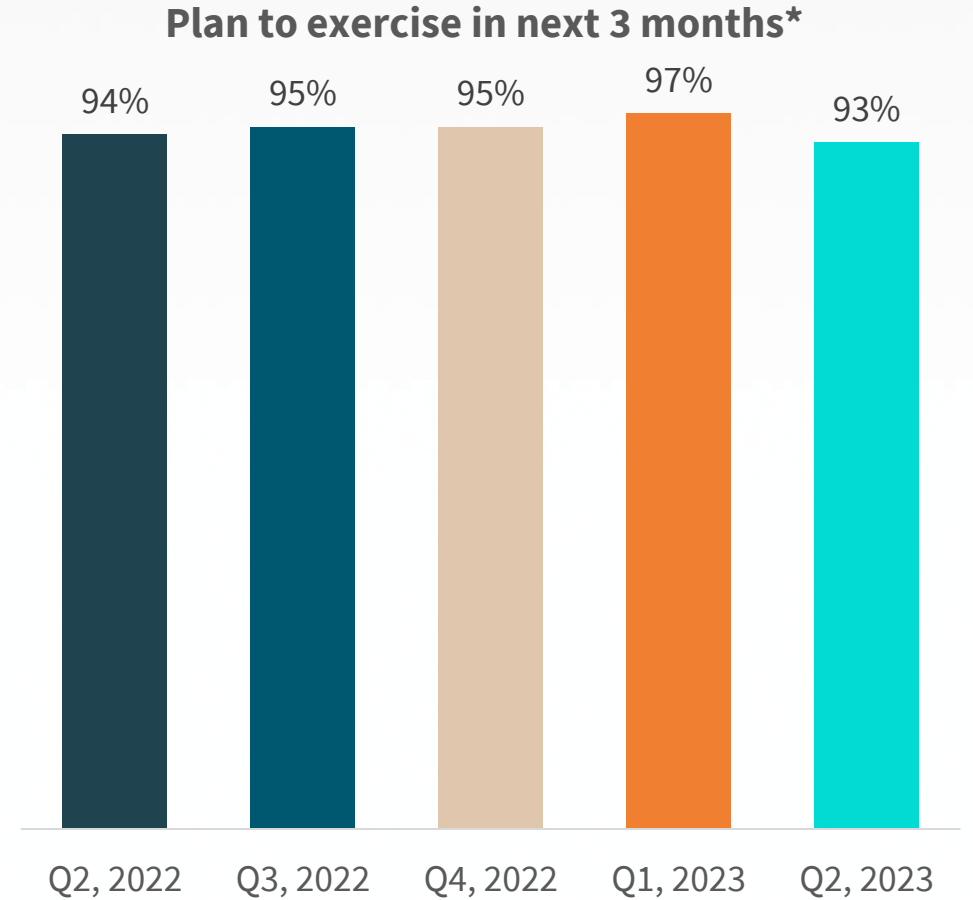
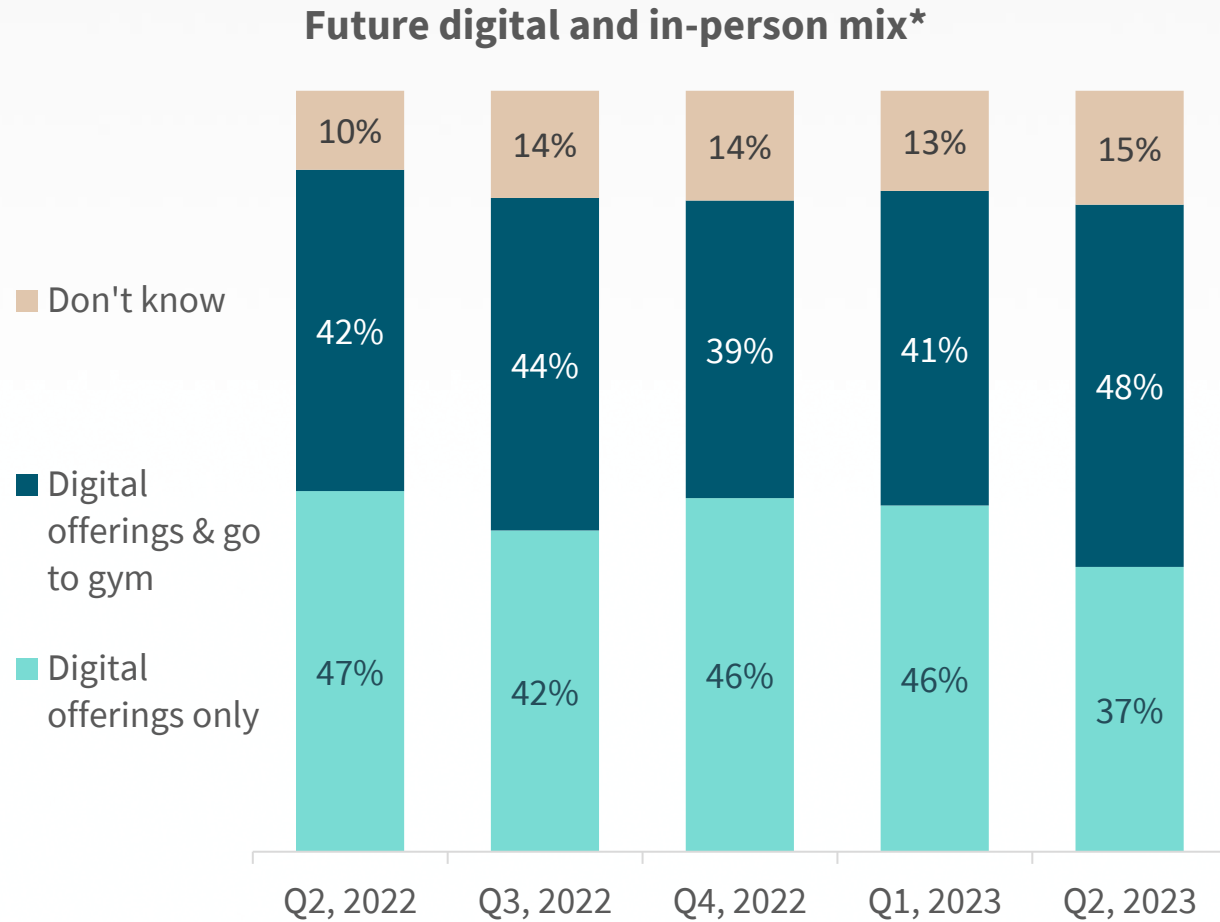


**Exercise routine in last 3 months:
In-person Vs. Digital***



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

Fewer active members intend to utilize digital offerings only, rather opting for a mix of in-person and digital



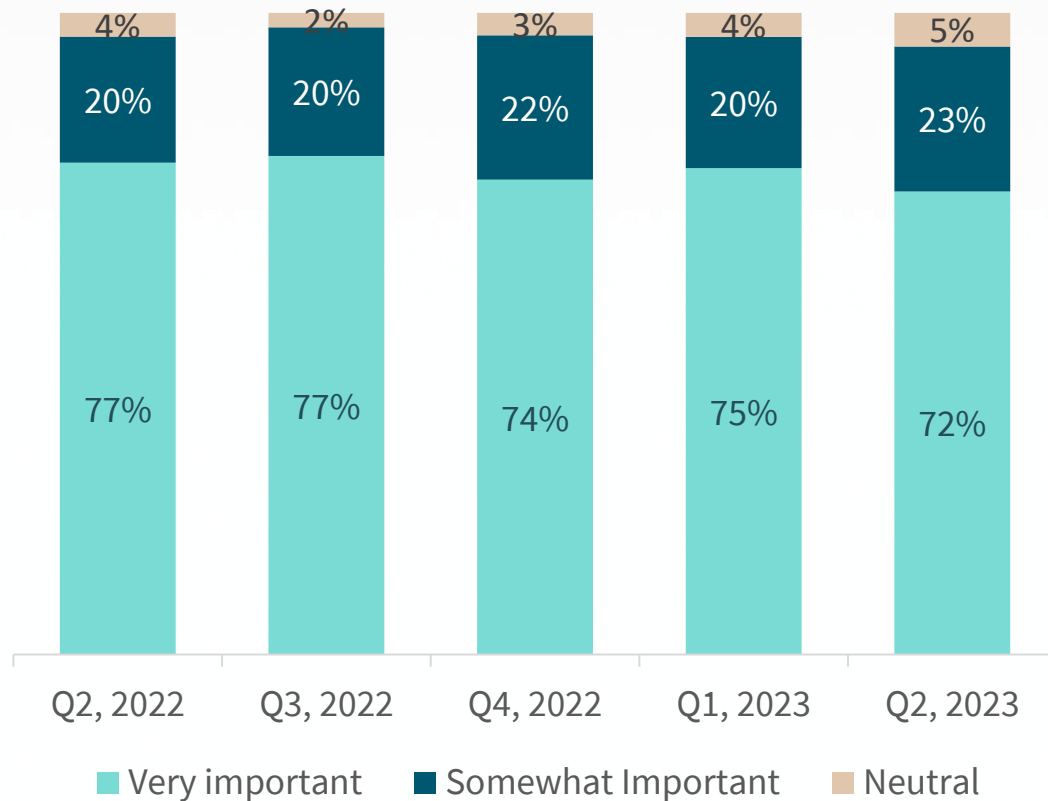
* Among those who have **participated in a digital exercise offering** in last 3 months

Nutrition

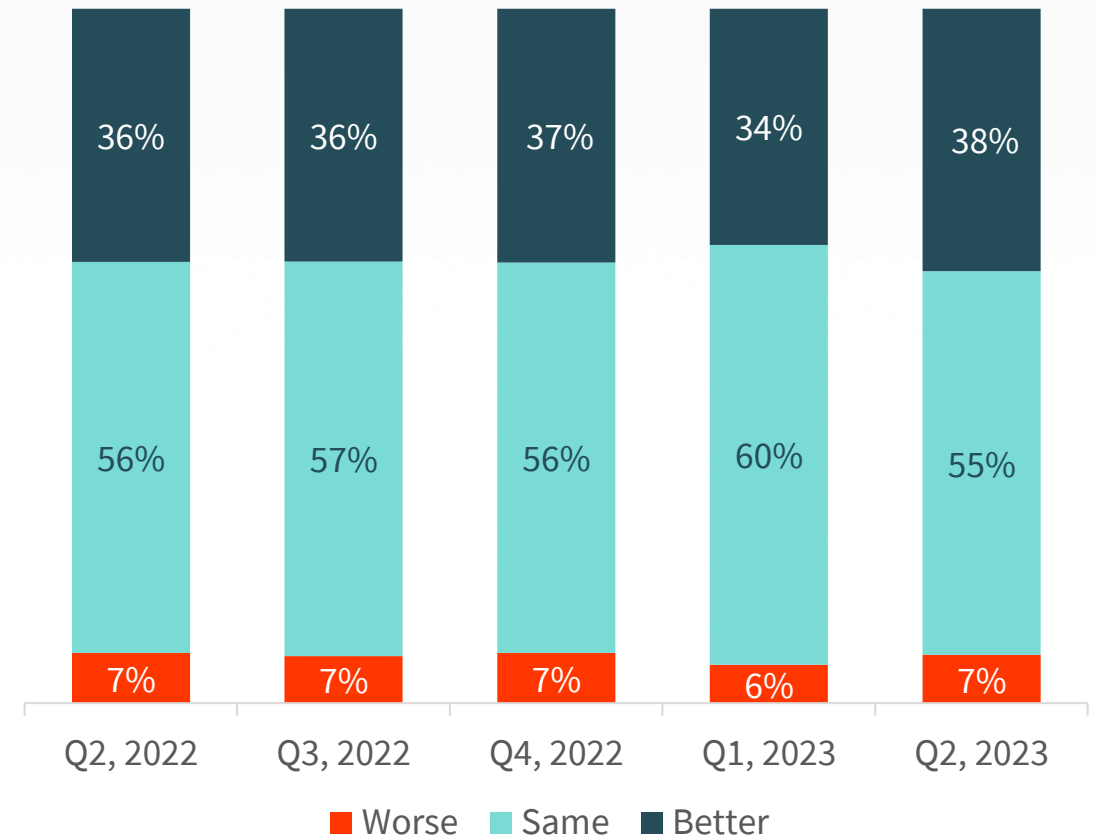
Now, let's talk about food and nutrition

Members' eating habits have remained relatively constant throughout the last year

Importance of eating healthy food to one's health*

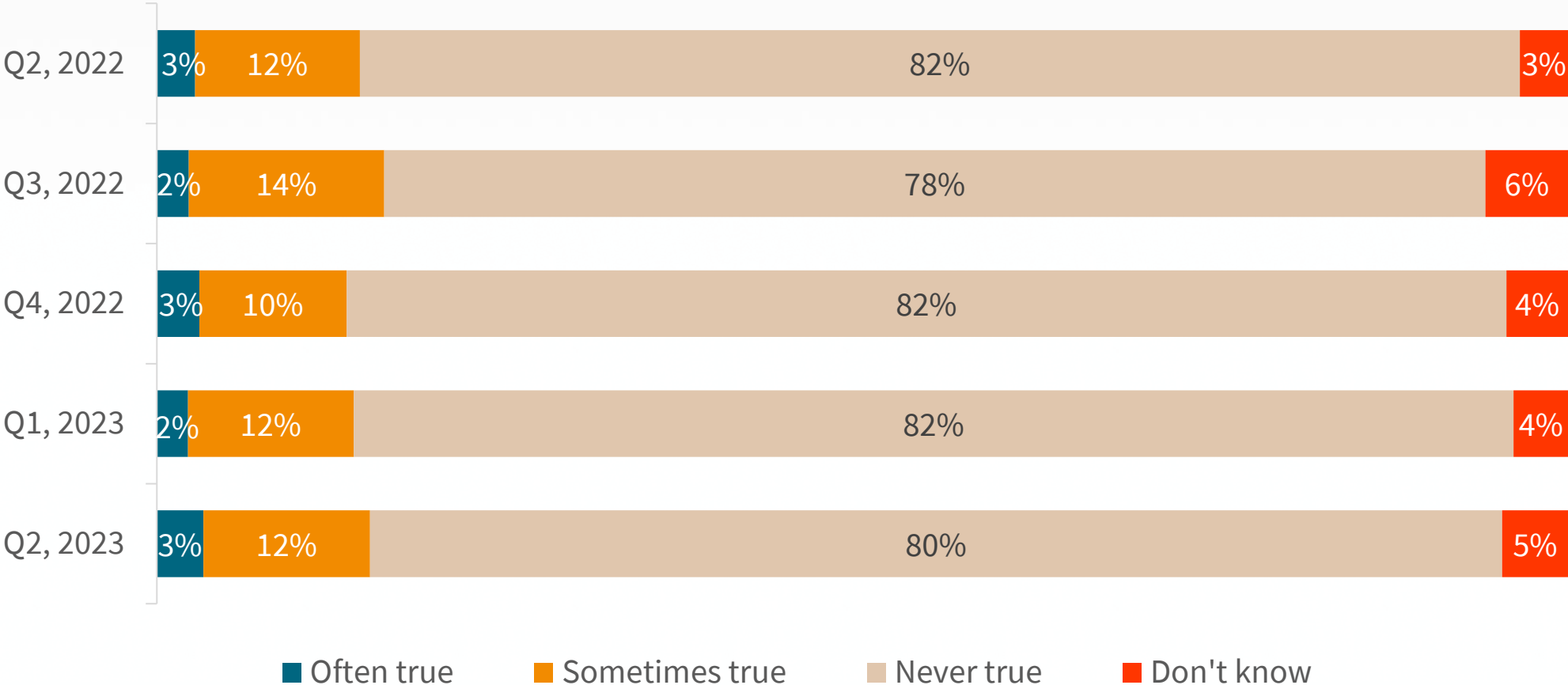


Eating habits compared to 3 months ago*



Similarly, the number of members who are concerned about their own food security is relatively unchanged from 2022

Worried food would run out before I had money to buy more

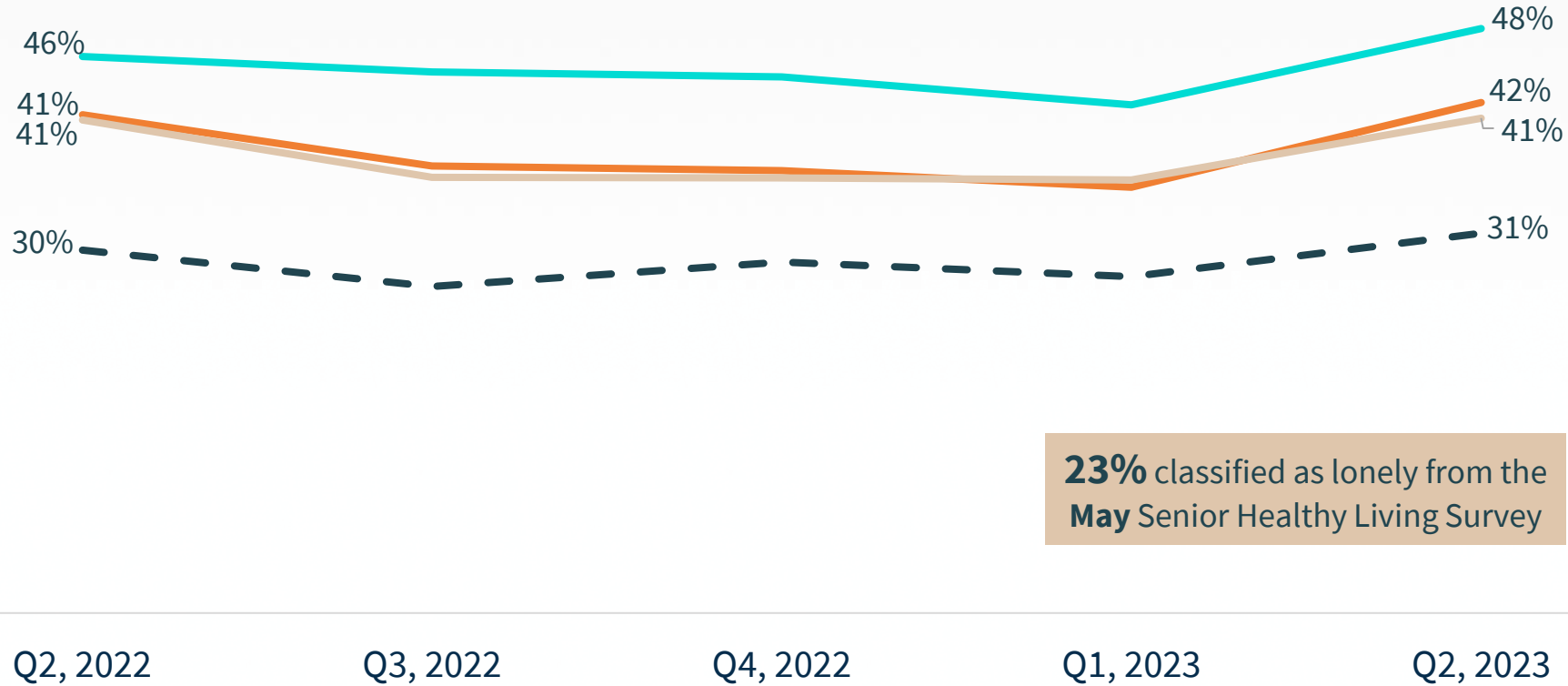


Social Connection

Now, let's talk about social connection

More members report feeling left out, isolated from others, and lacking companionship at least some of the time compared to three months ago

Percent of seniors who are lonely



23% classified as lonely from the **May Senior Healthy Living Survey**

*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"

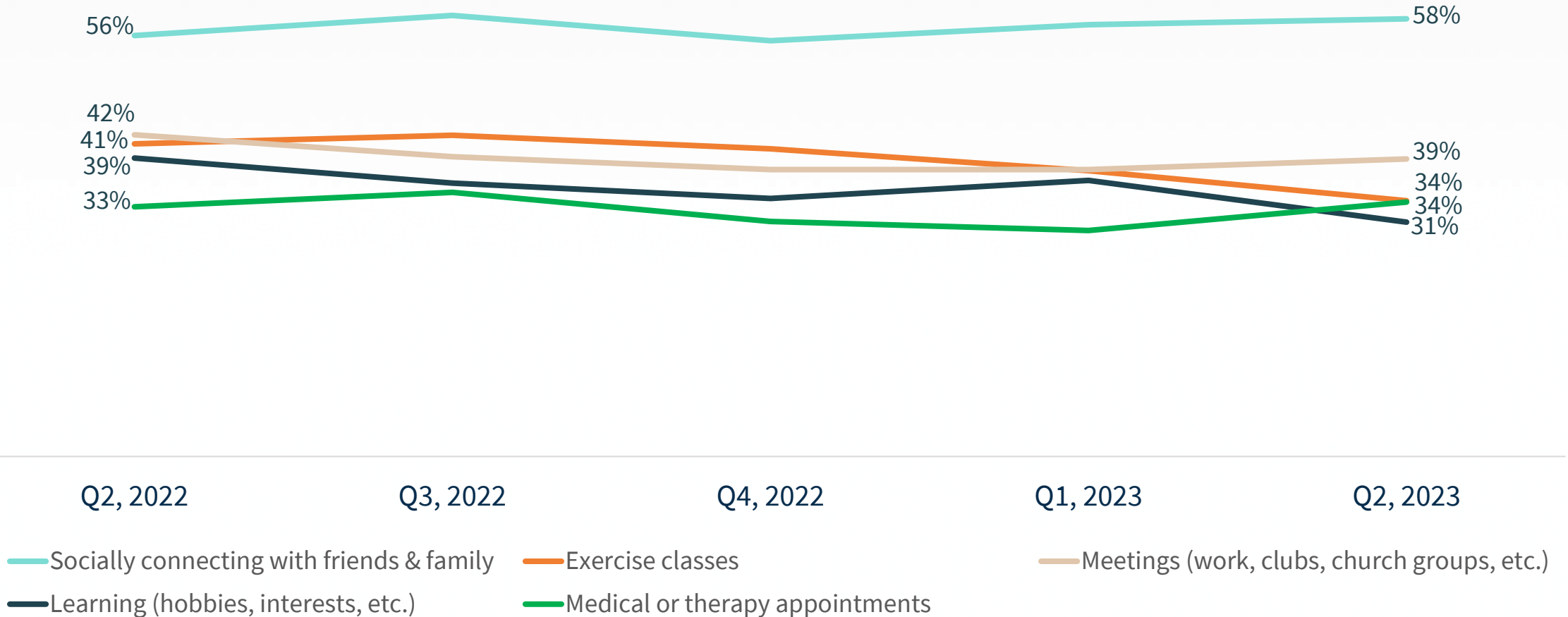
- Lack companionship
- Feel left out
- Feel isolated from others
- - - Feel lonely (UCLA loneliness scale)*

Showing often + Some of the time

Six in ten members remain digitally engaged with friends and family

Four in ten continue using digital platforms for both work and social meetings

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

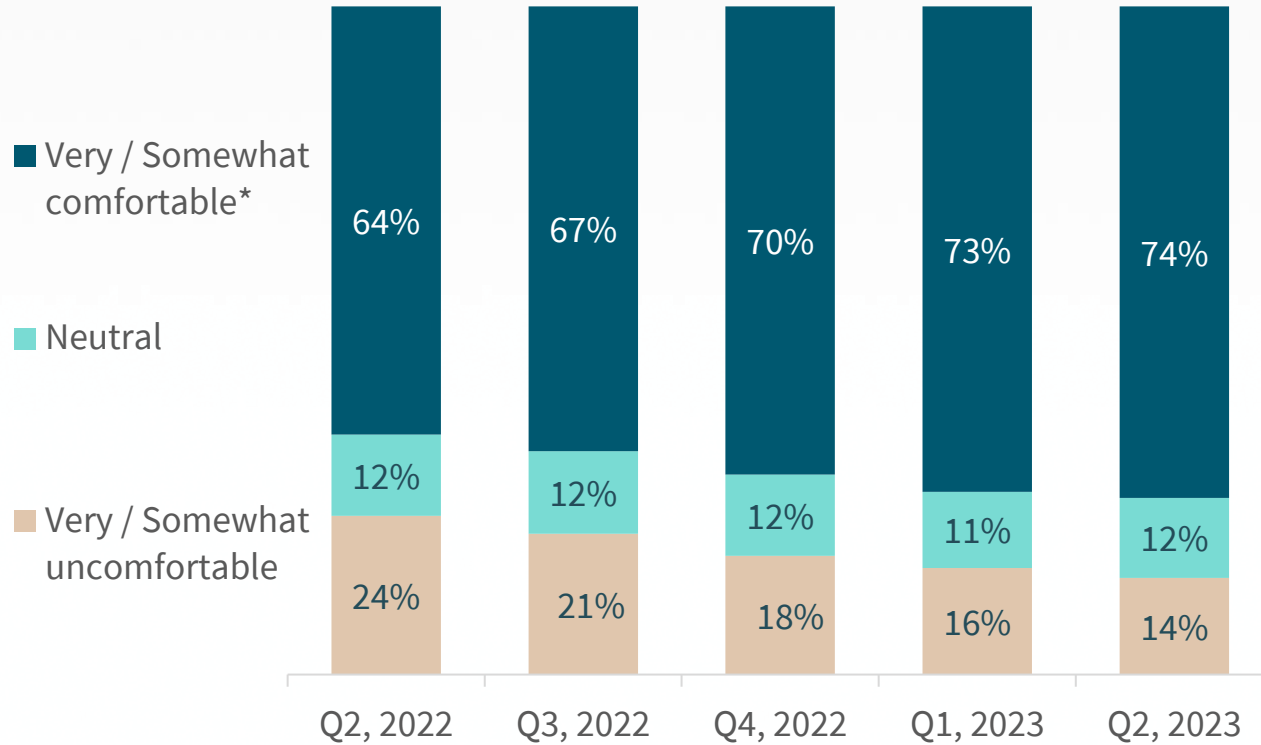


COVID-19 Perceptions & Attitudes

Now, let's talk about COVID-19

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

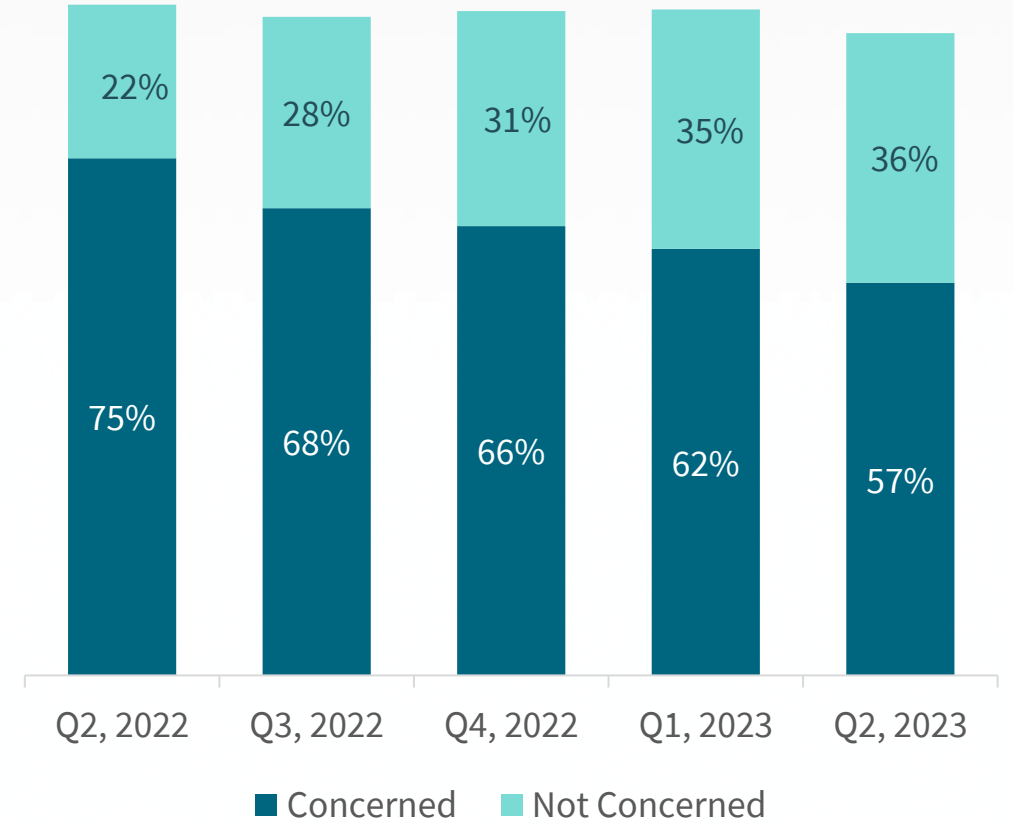
Comfort level socializing in public places*



87% are 'Very / Somewhat comfortable' from **May** Senior Healthy Living Survey

* Based on a 5-point rating scale

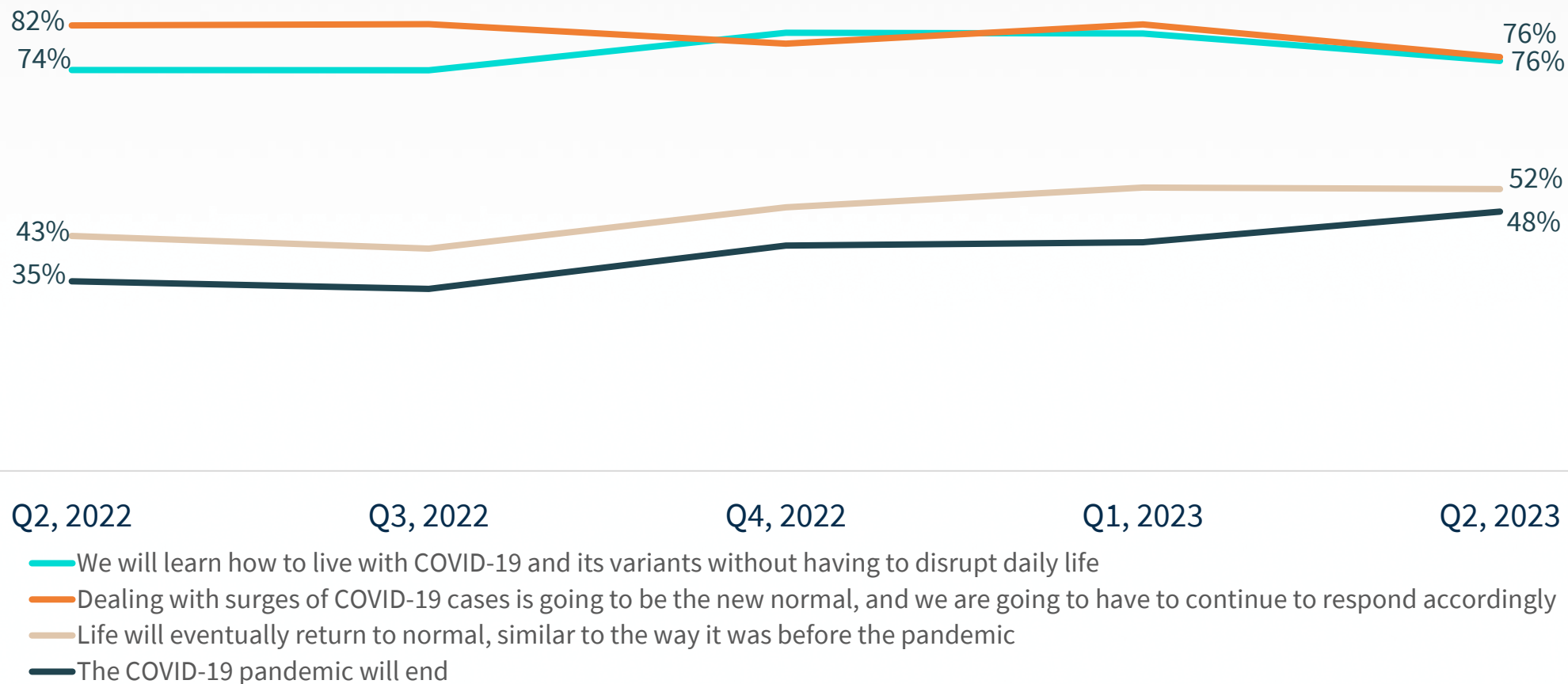
Level of concern for a Coronavirus outbreak**



* Based on a 4-point rating scale

Substantially more members believe the COVID-19 pandemic will end compared to a year ago

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



Q2, 2022

Q3, 2022

Q4, 2022

Q1, 2023

Q2, 2023

- We will learn how to live with COVID-19 and its variants without having to disrupt daily life
- Dealing with surges of COVID-19 cases is going to be the new normal, and we are going to have to continue to respond accordingly
- Life will eventually return to normal, similar to the way it was before the pandemic
- The COVID-19 pandemic will end

* Based on a 5-point rating scale

