
SilverSneakers Pulse Q323

Dr. Justin Barclay & Mark Sussman
Tivity Health Consumer Insights
August 2023



Key Takeaways

1

Self-motivation is as **important** as ever to drive **improvement** in **physical activity**. During the **summer** months, the **weather** has **minimal impact** in determining levels of **physical activity**.

2

Feelings of **loneliness** are **lower** compared to the previous quarter. Specifically, 43% feel they **lack companionship**, 37% feel **left out** and 36% feel **isolated from others**, at least some of the time. All these measures are **5 points lower** than the previous quarter.

3

Concern for a **COVID-19 outbreak increased** from the last quarter but has **no impact** on seniors' **comfort level** to socialize in public places. **77%** believe that we will learn to live with COVID-19 **without it disrupting daily life**.

Objectives & Methodology



Survey via SilverSneakers
Newsletter



642 total responses
received



Fieldwork period:
August 17th – 22nd, 2023

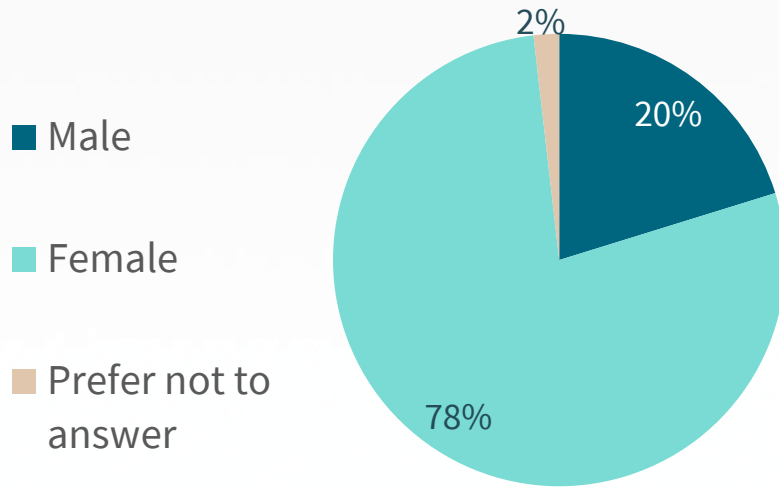
Objectives:

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

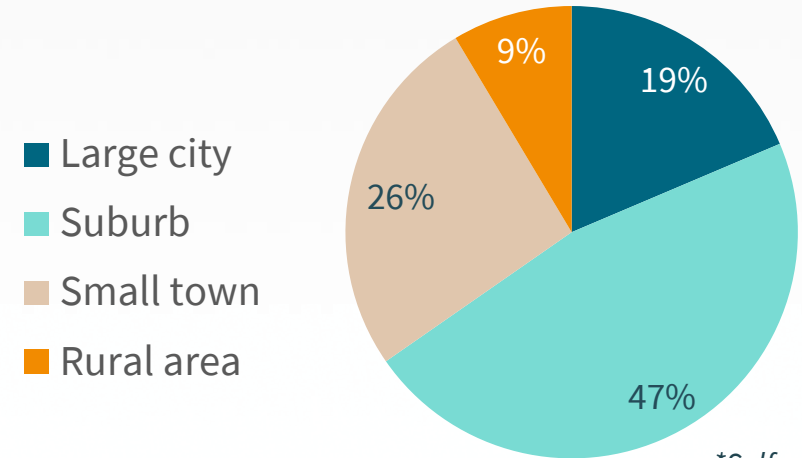
- Current exercise habits
- Current and perceived future digital fitness consumption
- Current nutrition habits
- Food insecurity perceptions
- Impact of COVID-19 on daily life
- Social connection

Respondent Profile – Quarter 3, 2023

Gender

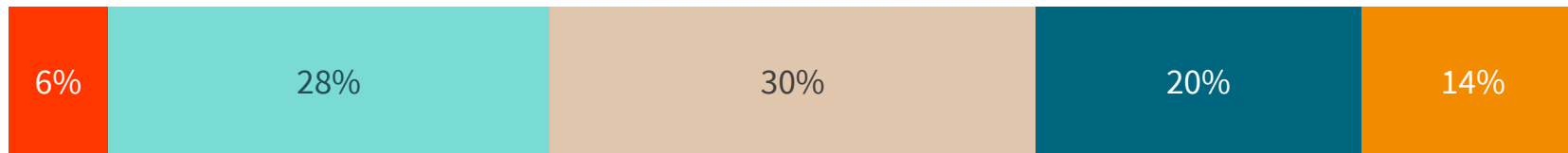


Urbanicity*



*Self-reported

Age



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

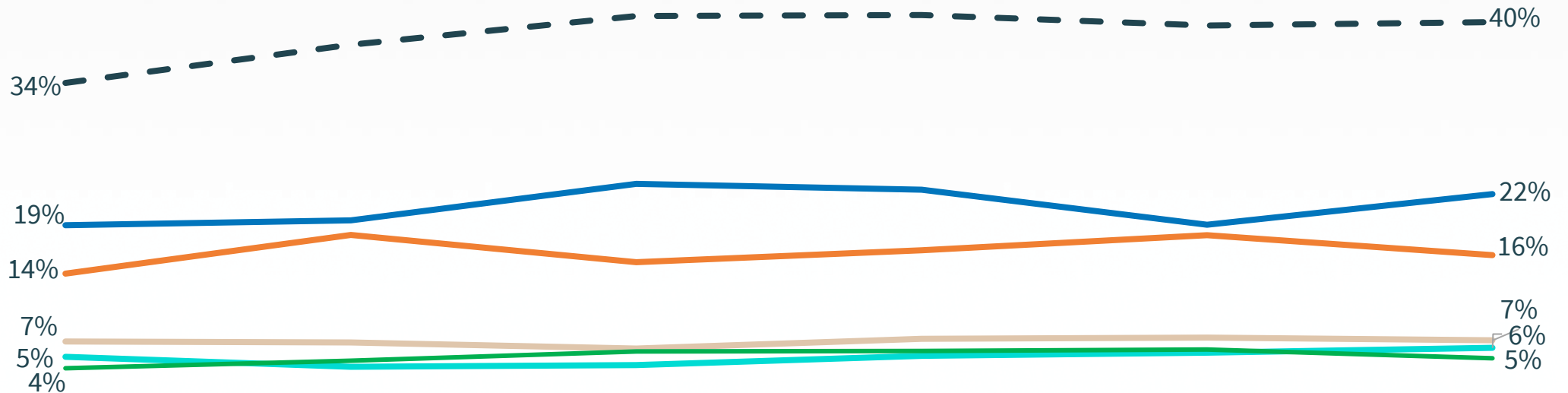
No answer : 1%

Fitness & Physical Activity

Now, let's talk about physical activity

Unguided individual workouts remain the most popular activities performed at the gym

Current physical activity - Gym



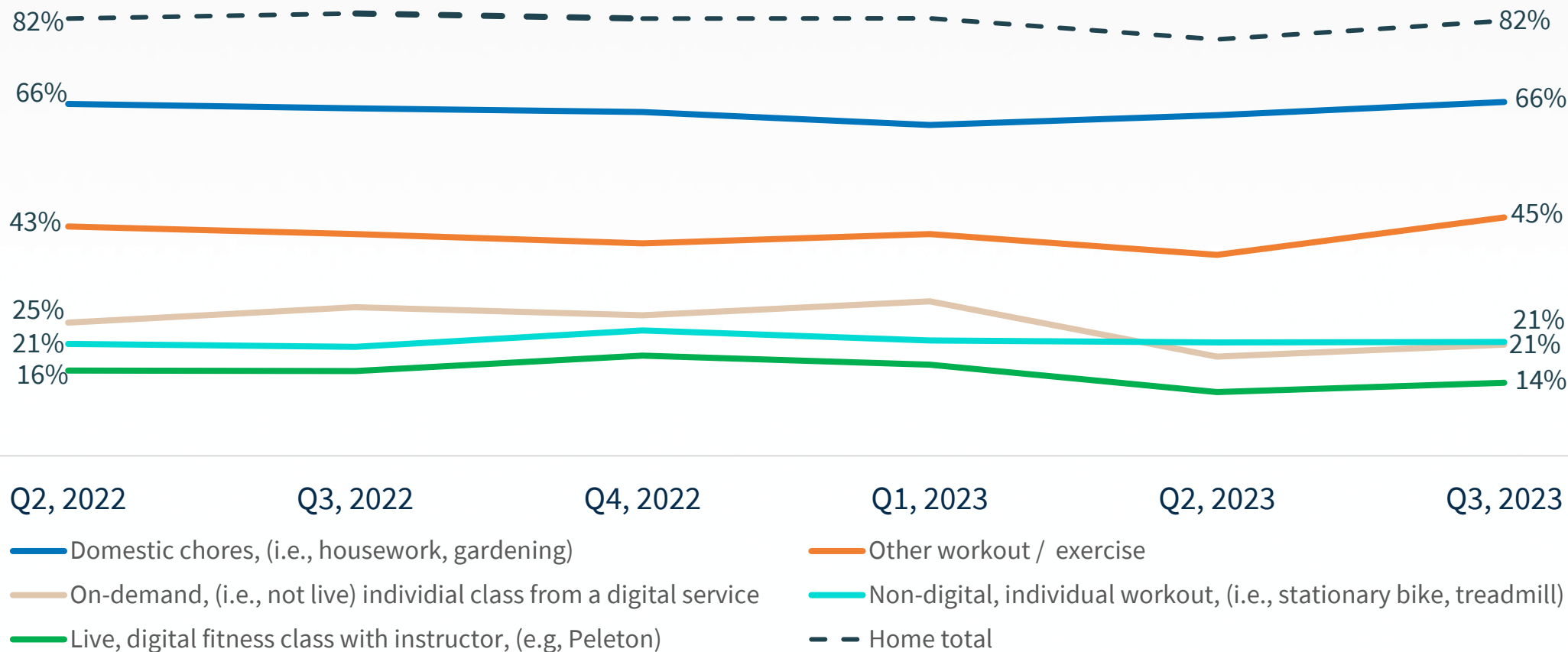
Q2, 2022 Q3, 2022 Q4, 2022 Q1, 2023 Q2, 2023 Q3, 2023

- 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, Q3, 2023: 93%

Domestic chores, like housework and gardening, remain the dominant physical activity performed at home

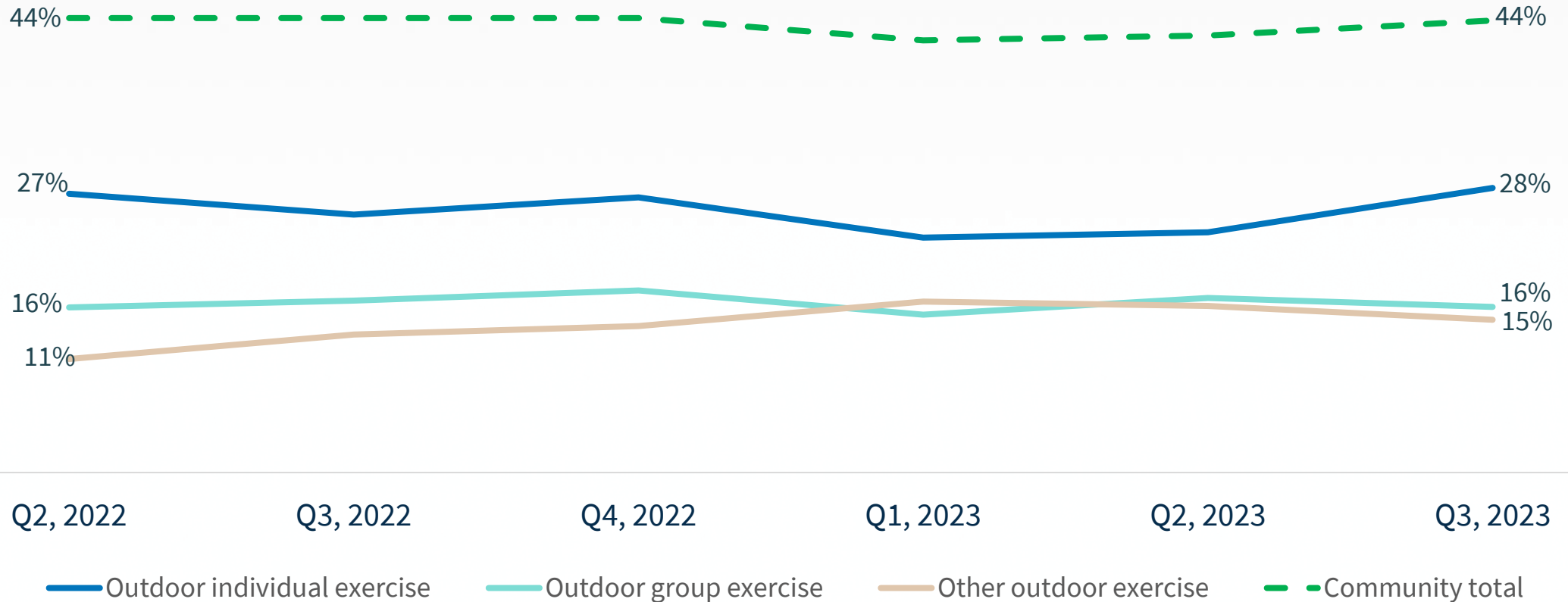
Current physical activity - Home



All physical activity, Q3, 2023: 93%

More members participated in outdoor individual exercise compared to earlier in 2023

Current physical activity - Community

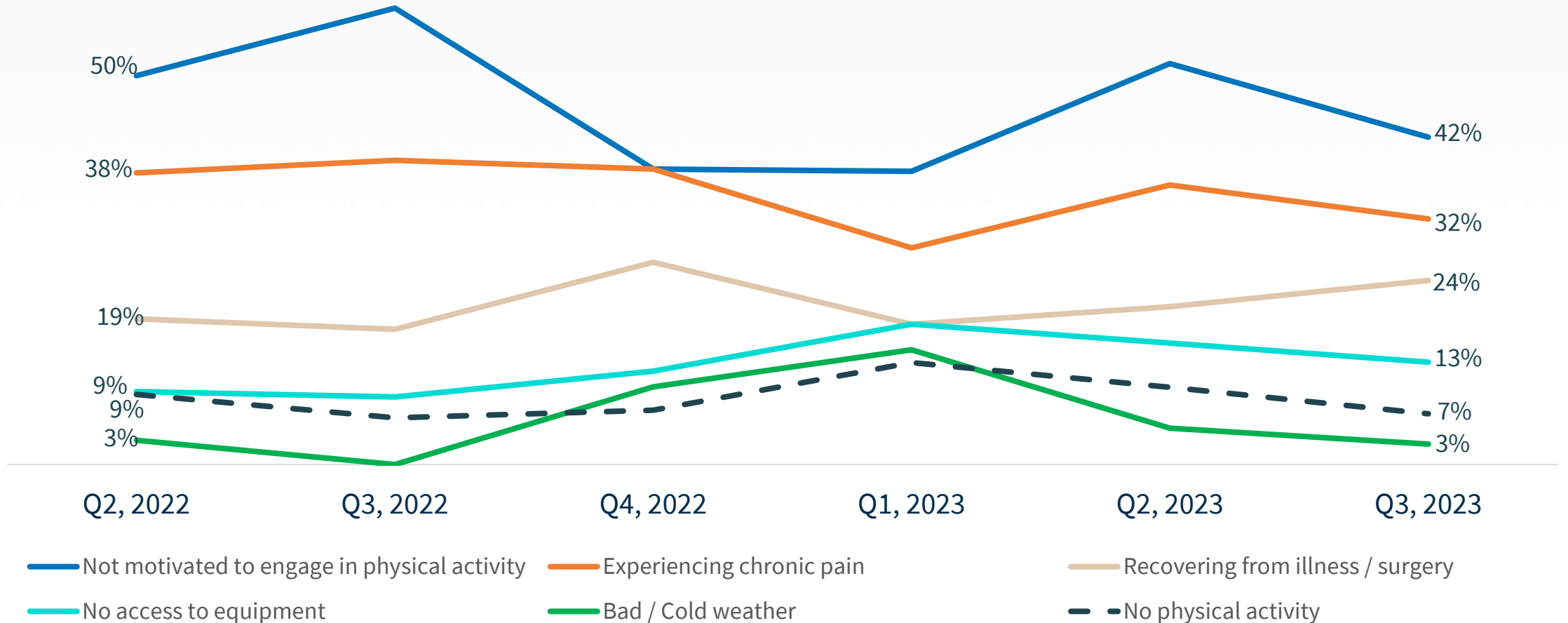


All physical activity, Q3, 2023: 93%

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

One in four members are recovering from illness or surgery

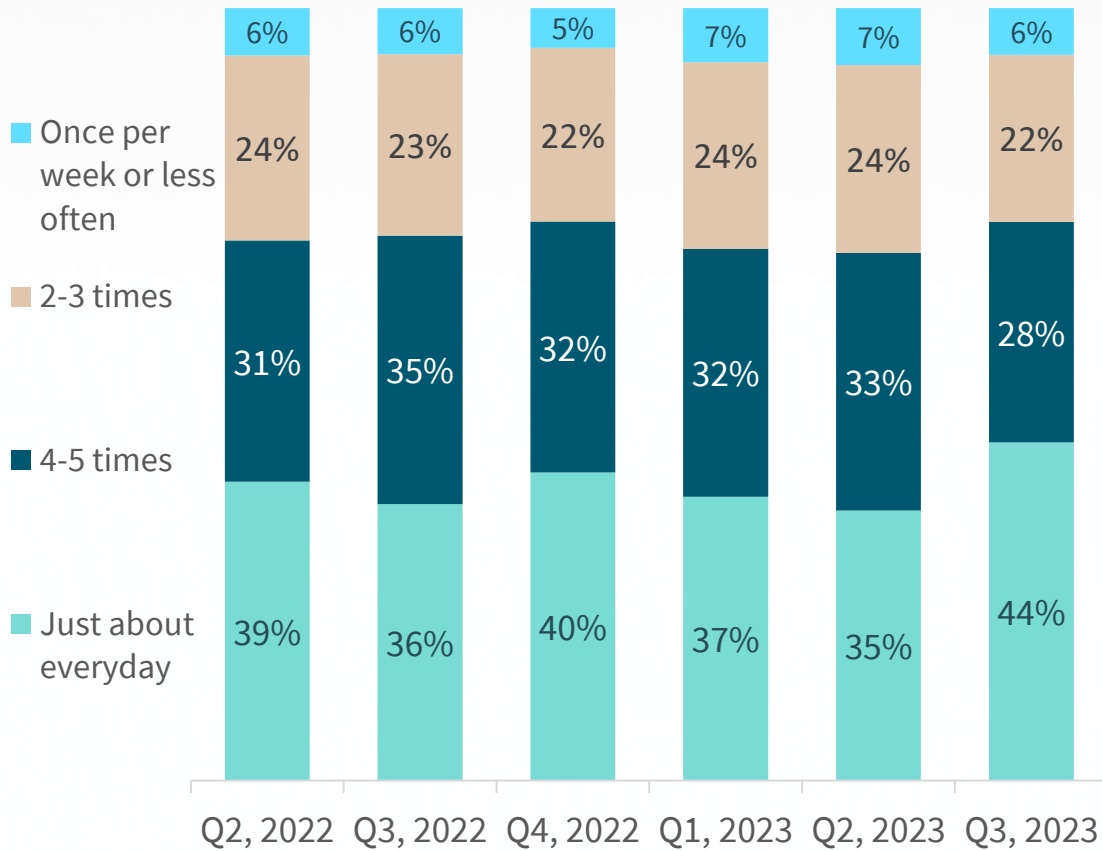
Main reasons for no physical activity*



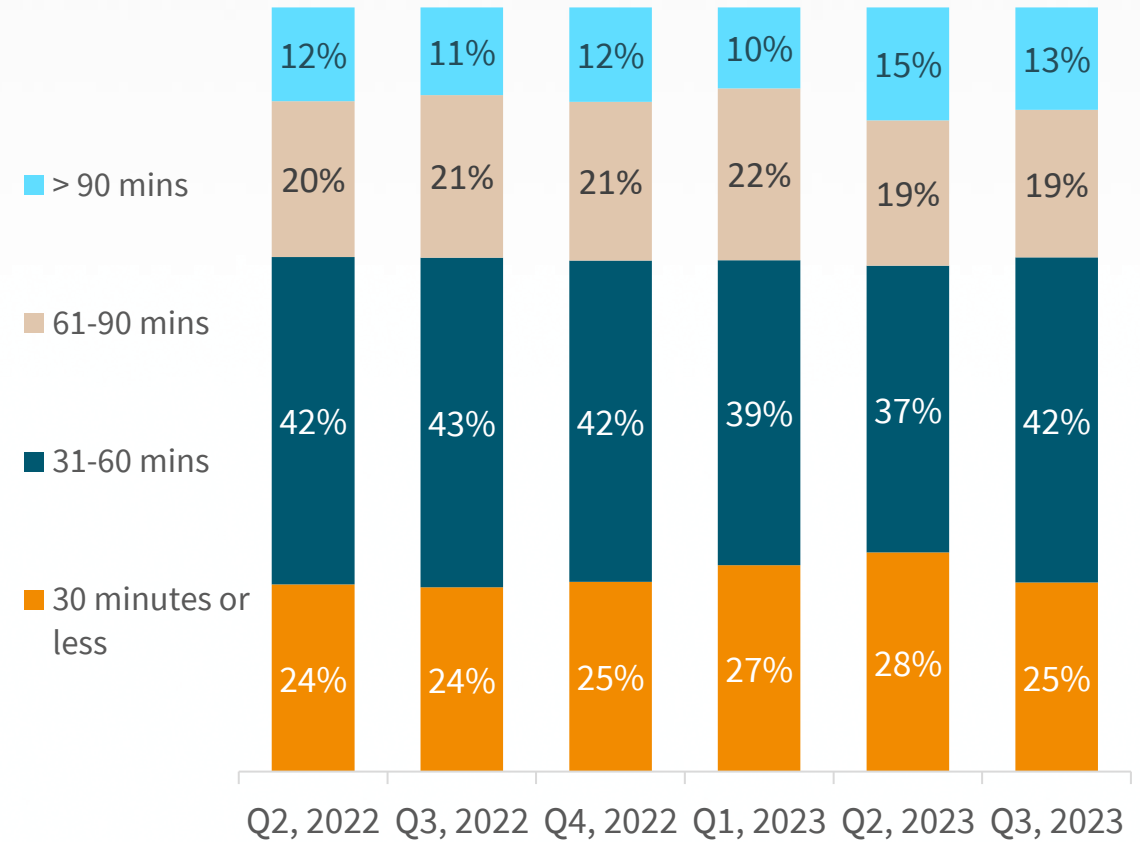
* Caution: Results should be treated directionally due to small base size

About seven in ten respondents are physically active at least 4 times per week, typically spending up to 60 minutes per day

Physical activity – Number of days per week



Physical activity – Time spent per day

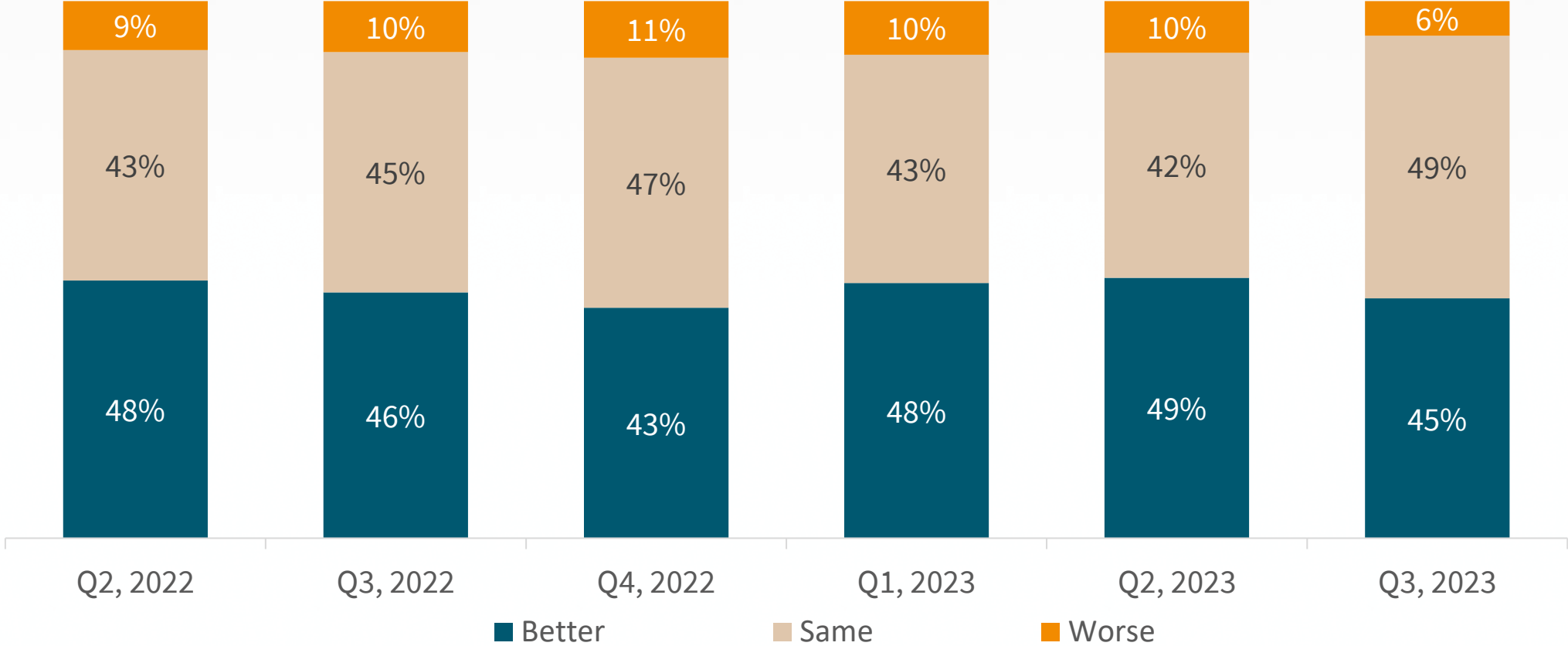


Q3: In the last 3 months, about how many **days per week** on average have you been exercising or doing physical activity?

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

Throughout 2023, nearly half continue to rate their physical activity better than the three months prior

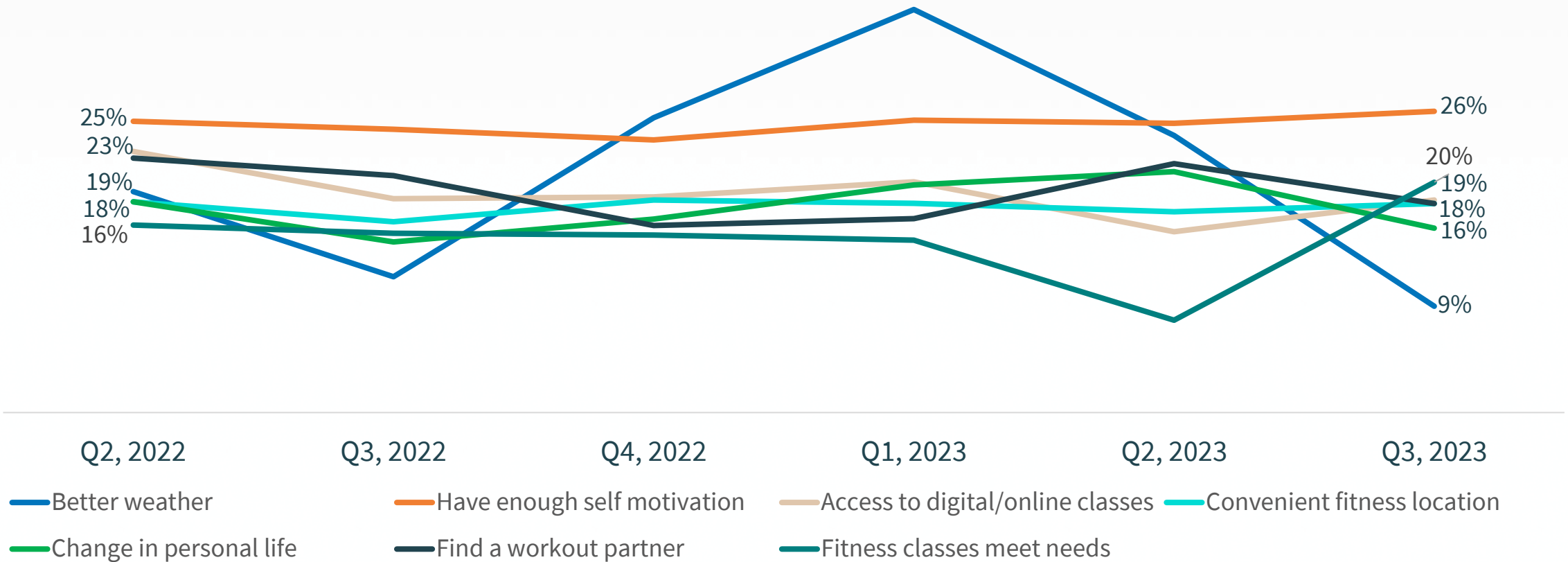
Level of physical activity versus 3 months ago



Self-motivation together with several other factors will help increase members' physical activity

During summer months, the weather is less important in determining levels of physical activity

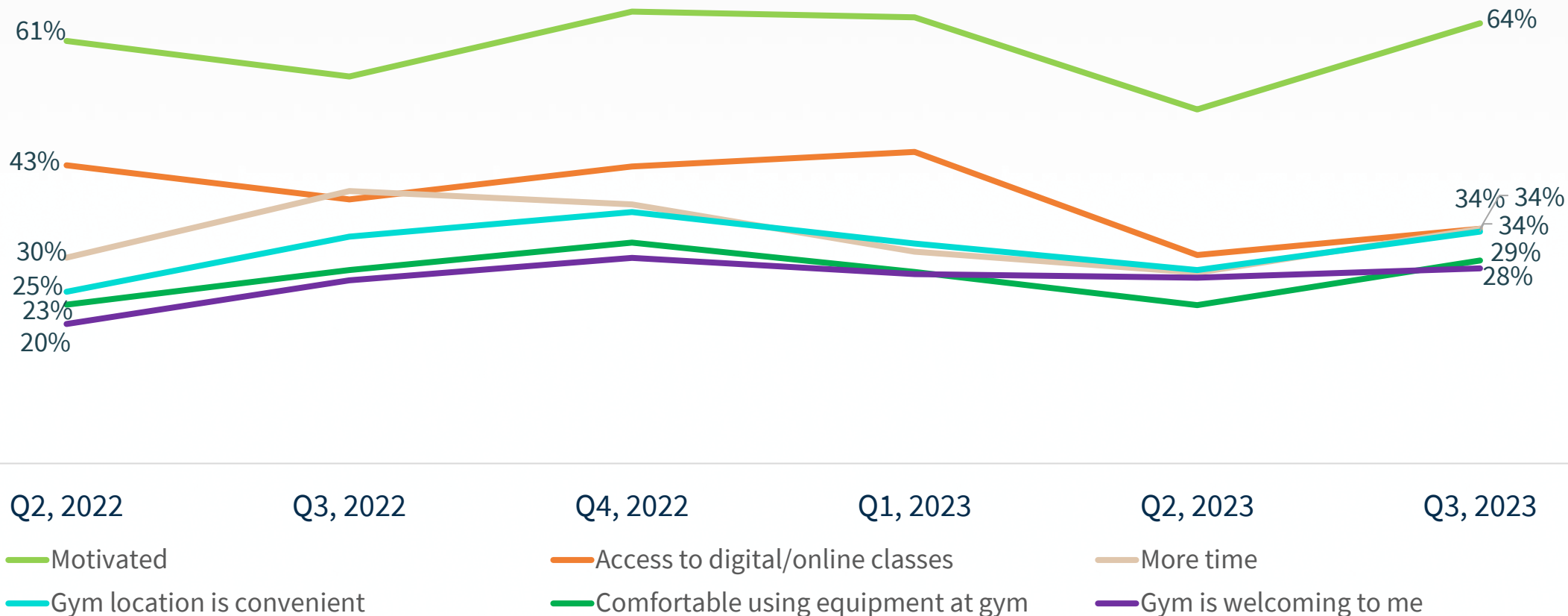
Main factors that will help increase physical activity time*



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

Nearly two out of three respondents mention self-motivation as a key driver for improvement in their physical activity

Main reasons for improvement in physical activity

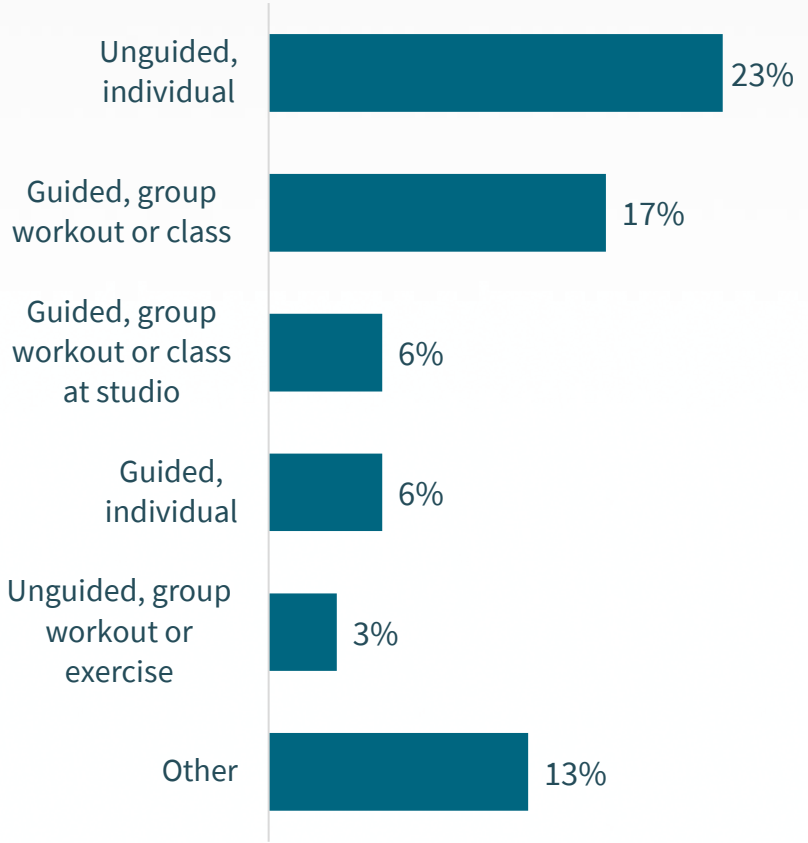


* Among those whose physical activity is **better** versus 3 months ago

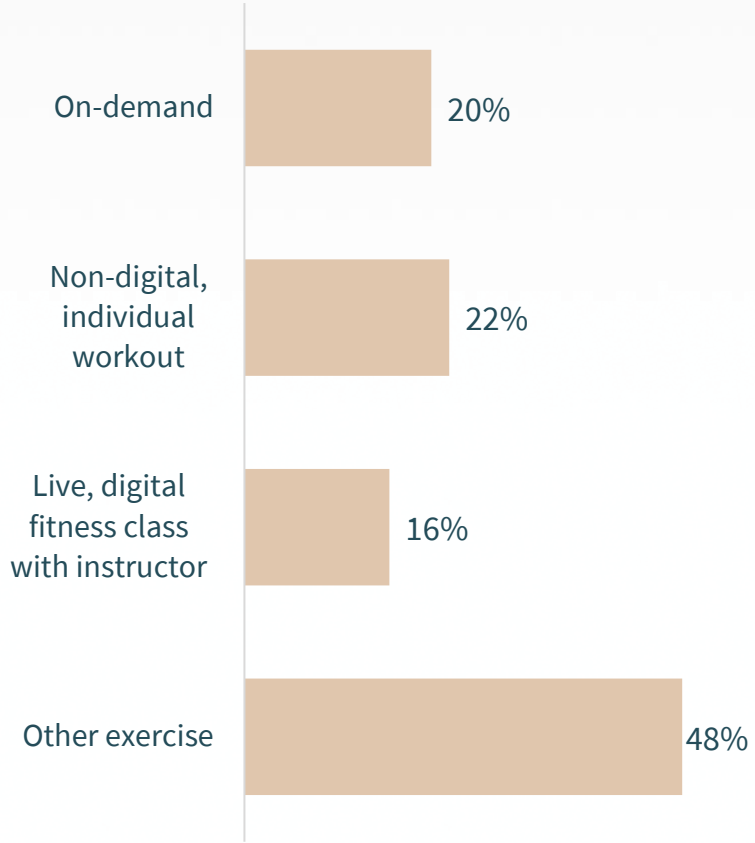
Two out of three members fitness regimen occurs in the home, with a similar mix of gym and community activities

Current fitness activity

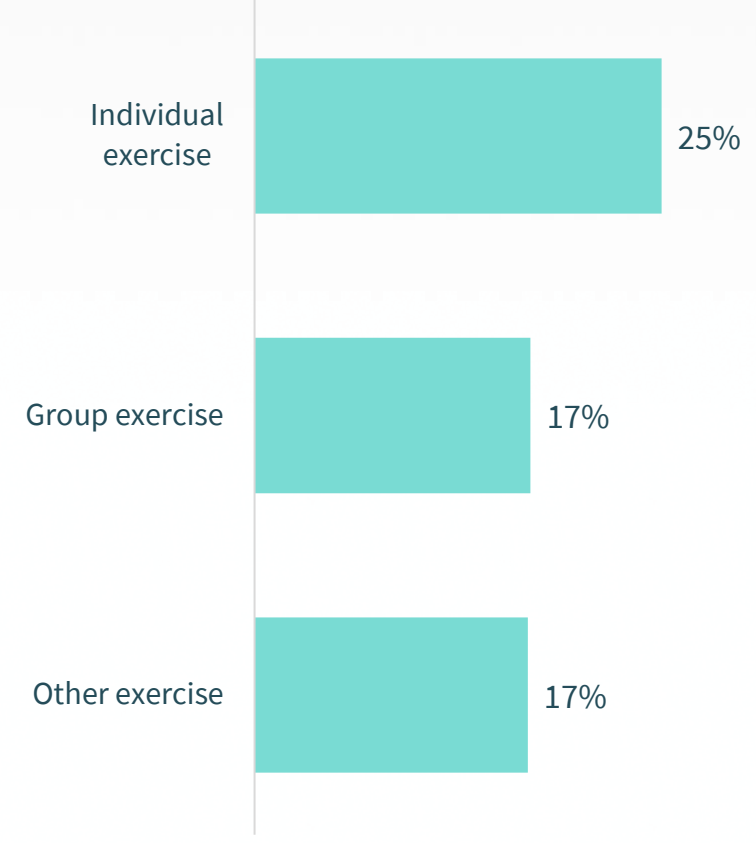
Gym: 41%



Home: 67%



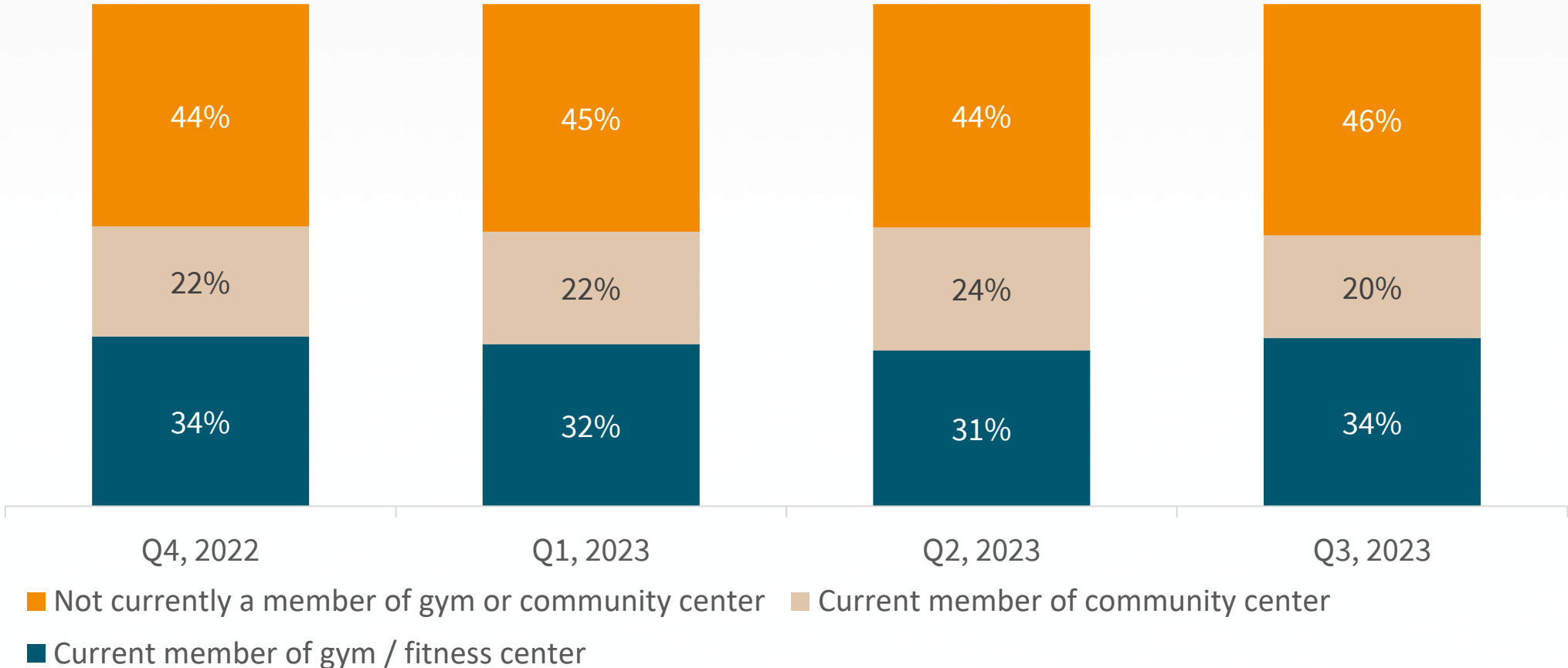
Community: 43%



All fitness activity, Q3, 2023: 89%

The proportion of respondents who belong to a gym or community center has remained constant throughout 2023

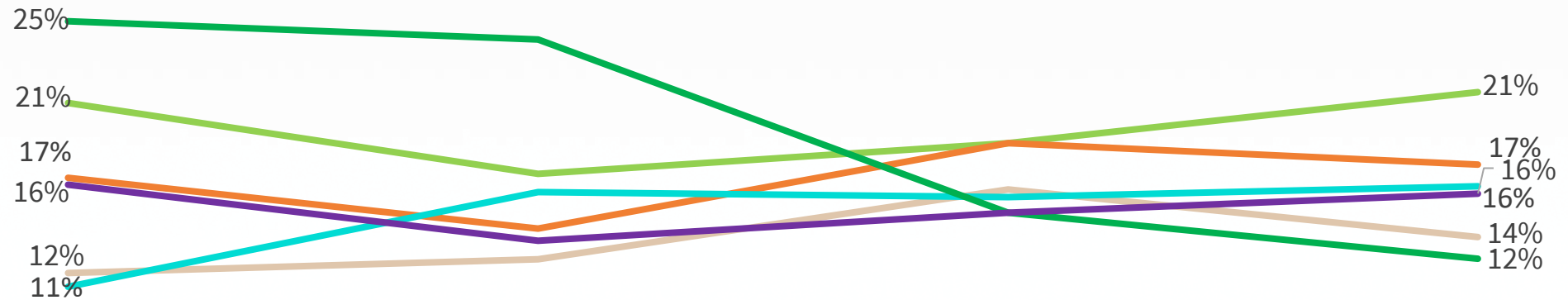
Gym / community center membership



One in five feel awkward going to a gym or community center

Lack of value and cost as well as limitations due to a chronic condition also prohibit respondents from joining a gym or community center that offers SilverSneakers

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



Q4, 2022

Q1, 2023

Q2, 2023

Q3, 2023

Feel awkward going to gym

Membership not worth it

Not motivated enough

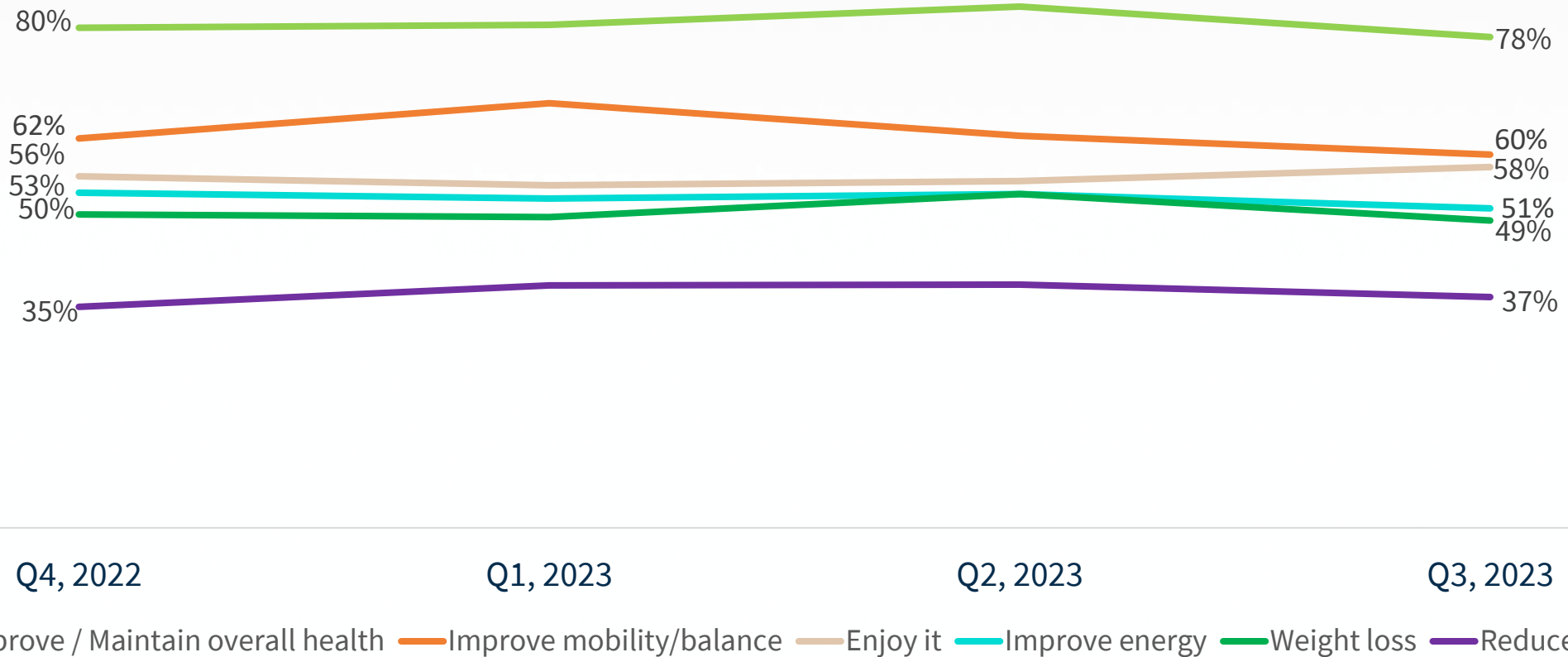
Limitations due to chronic condition

COVID concerns

Membership too expensive

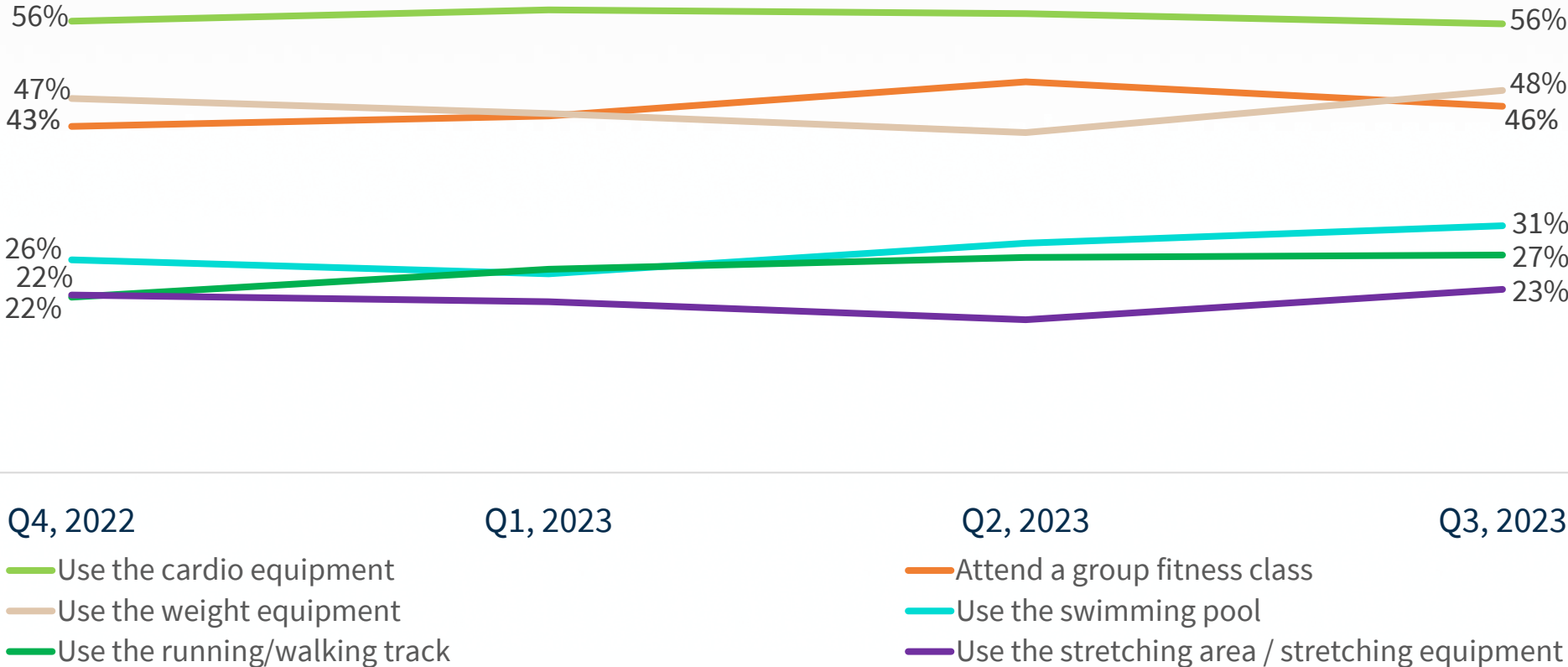
Maintaining or improving health and improving balance continue as the primary reasons for joining a gym that offers SilverSneakers

Main reasons for joining a gym / community center that offers SilverSneakers



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

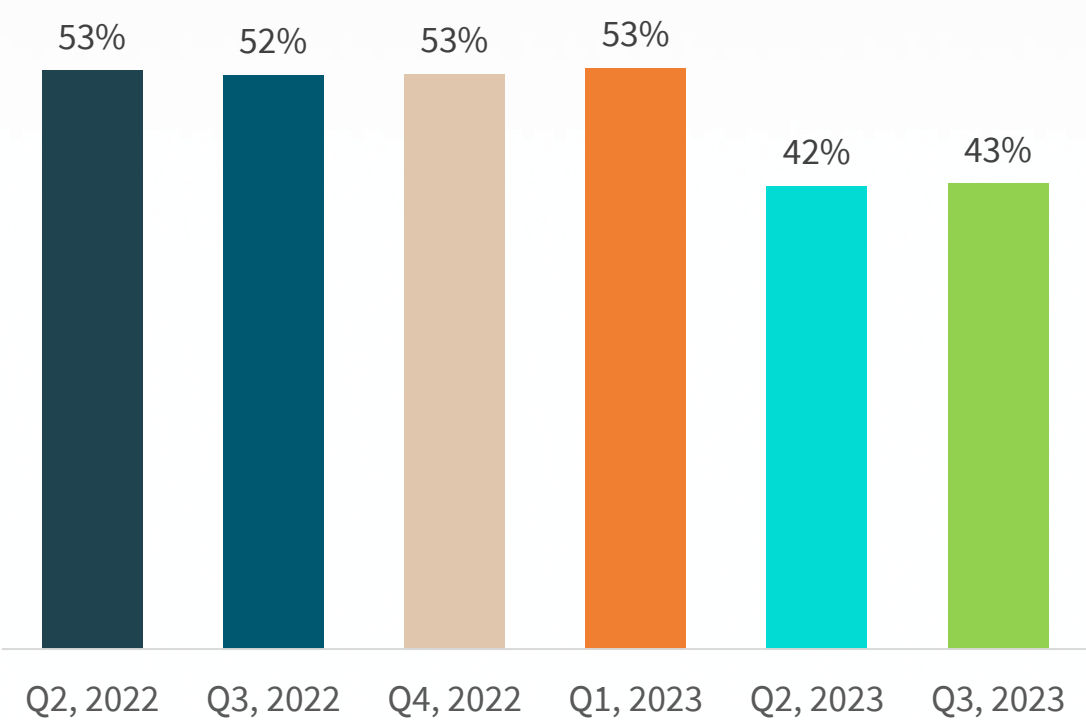
Activities participated at gym / community center that offers SilverSneakers



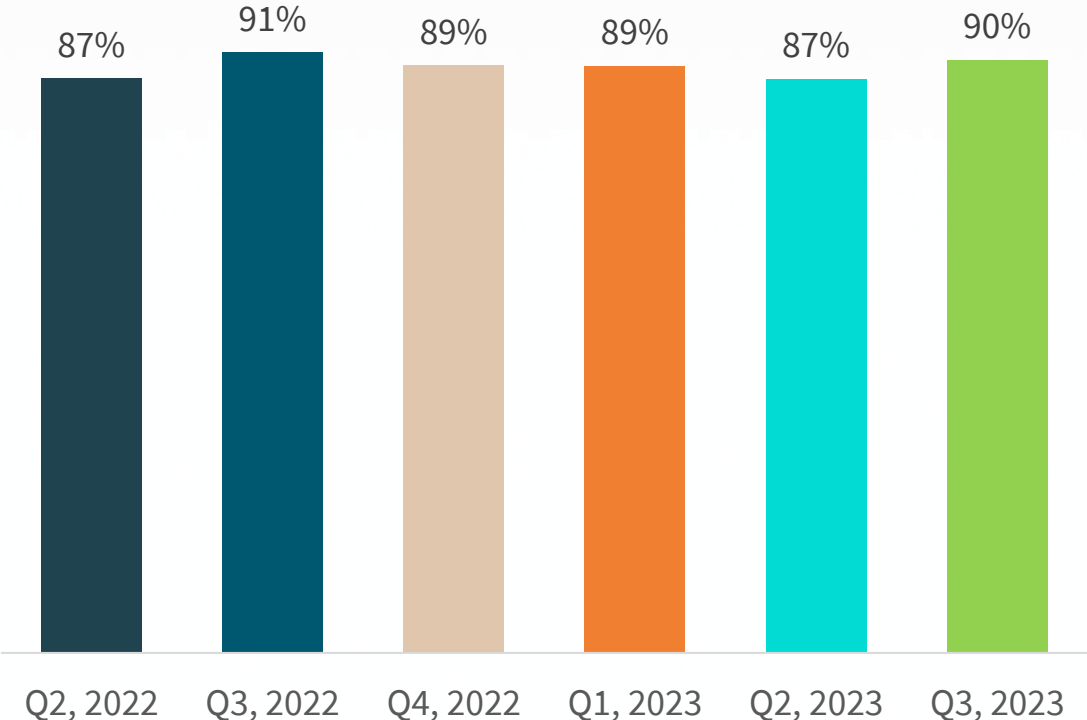
The proportion of members active in SilverSneakers digital offerings is similar to three months ago

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

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



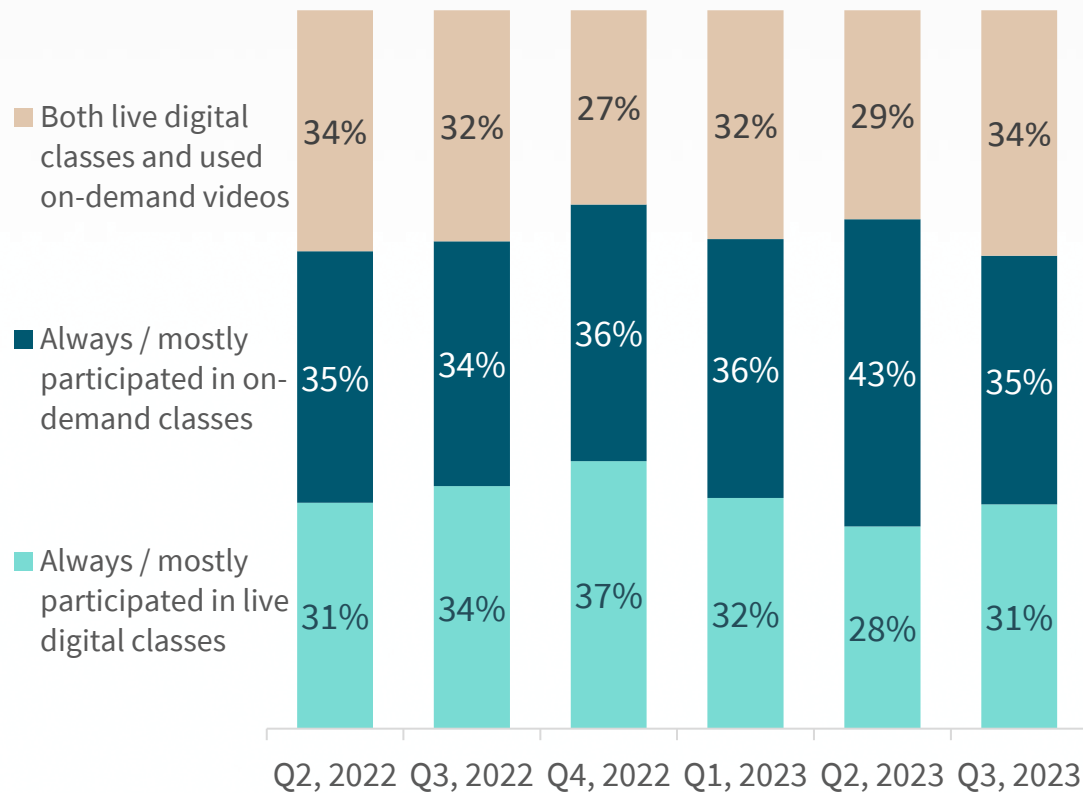
Continue using SilverSneakers digital offerings, (% 'Yes')



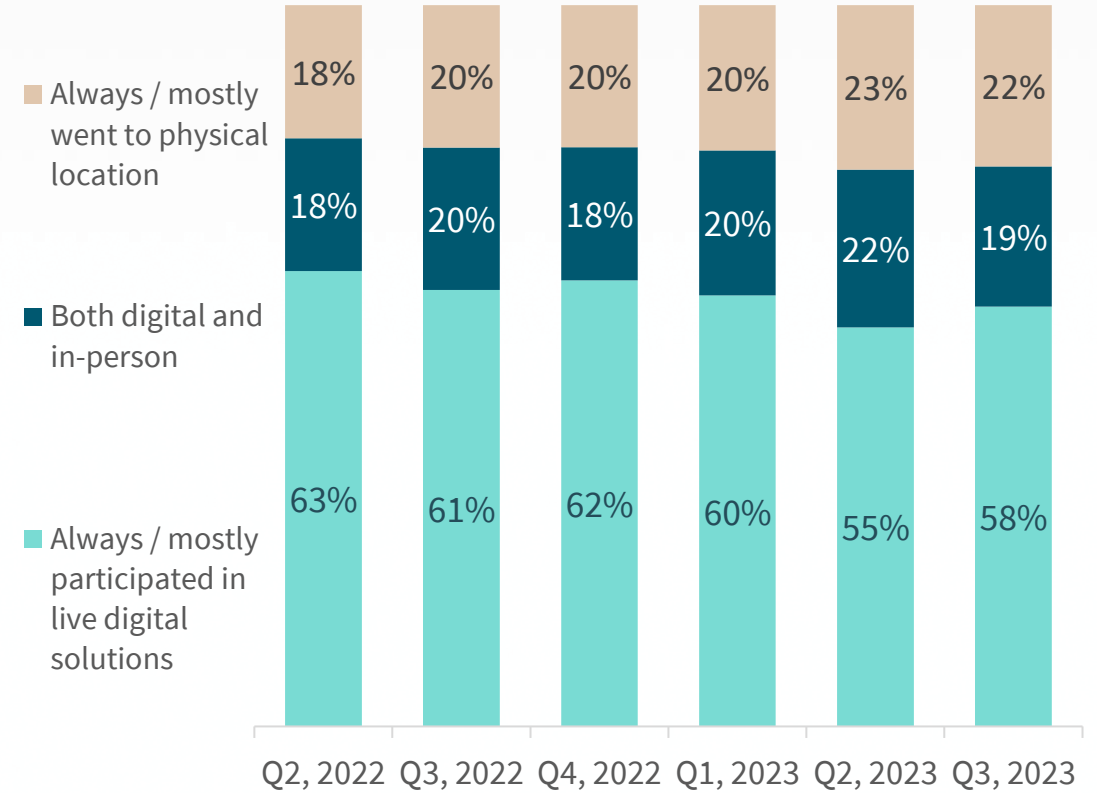
About four in ten of these digital users are also attending in-person classes

A similar number of digital users are participating in live an on-demand classes

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



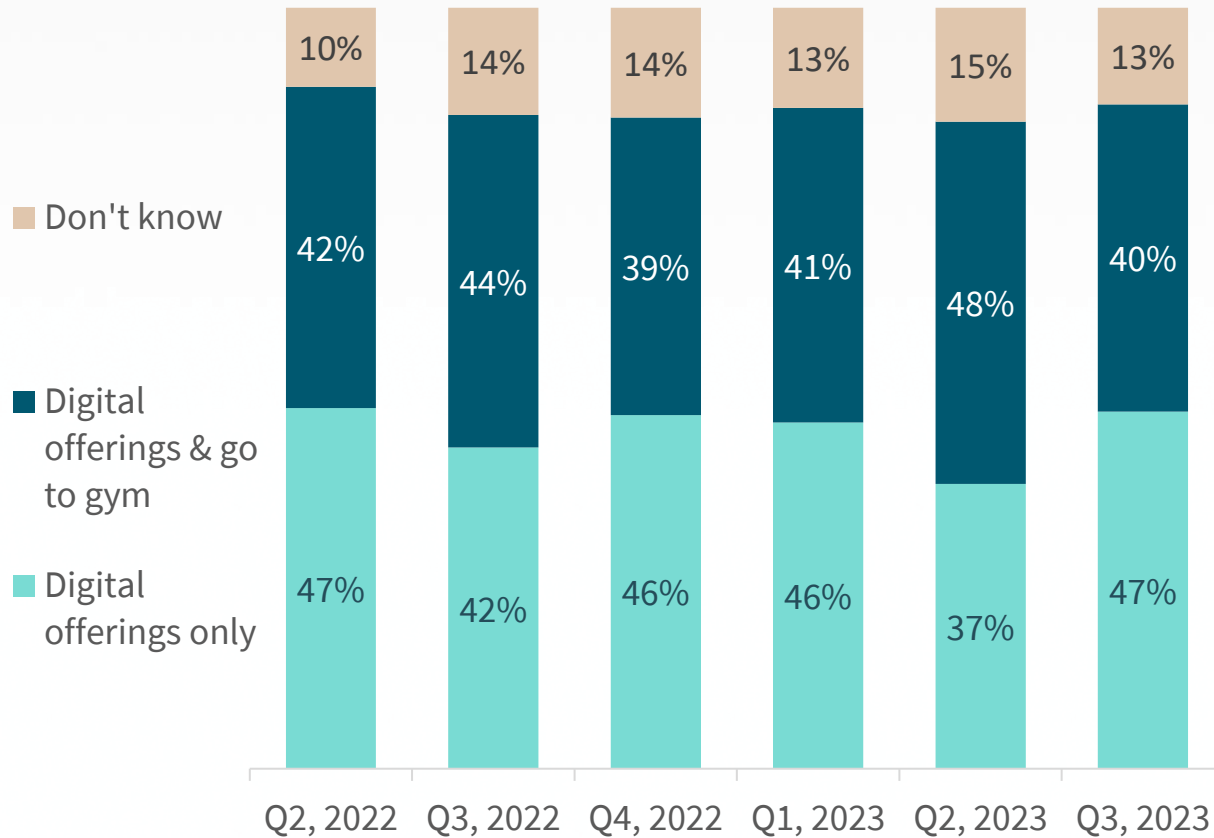
**Exercise routine in last 3 months:
In-person Vs. Digital***



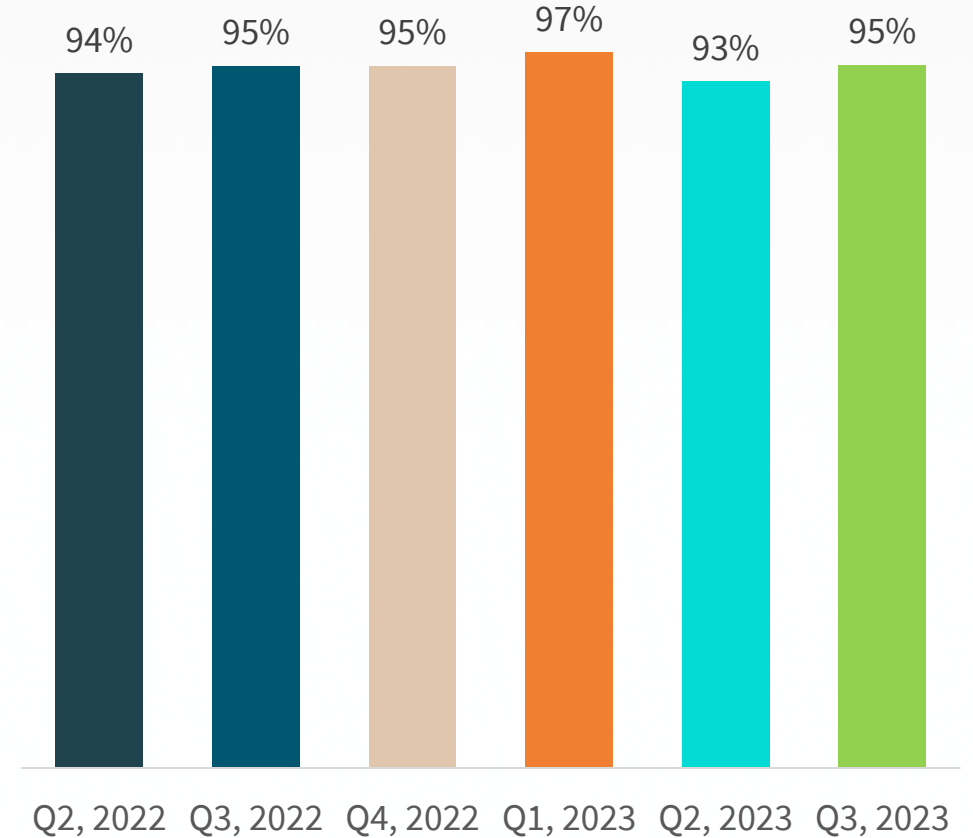
* Among those who have **participated in a digital exercise offering** in last 3 months

Compared to last quarter, a higher number of digital fitness users intend to utilize digital offerings only

Future digital and in-person mix*



Plan to exercise in next 3 months*



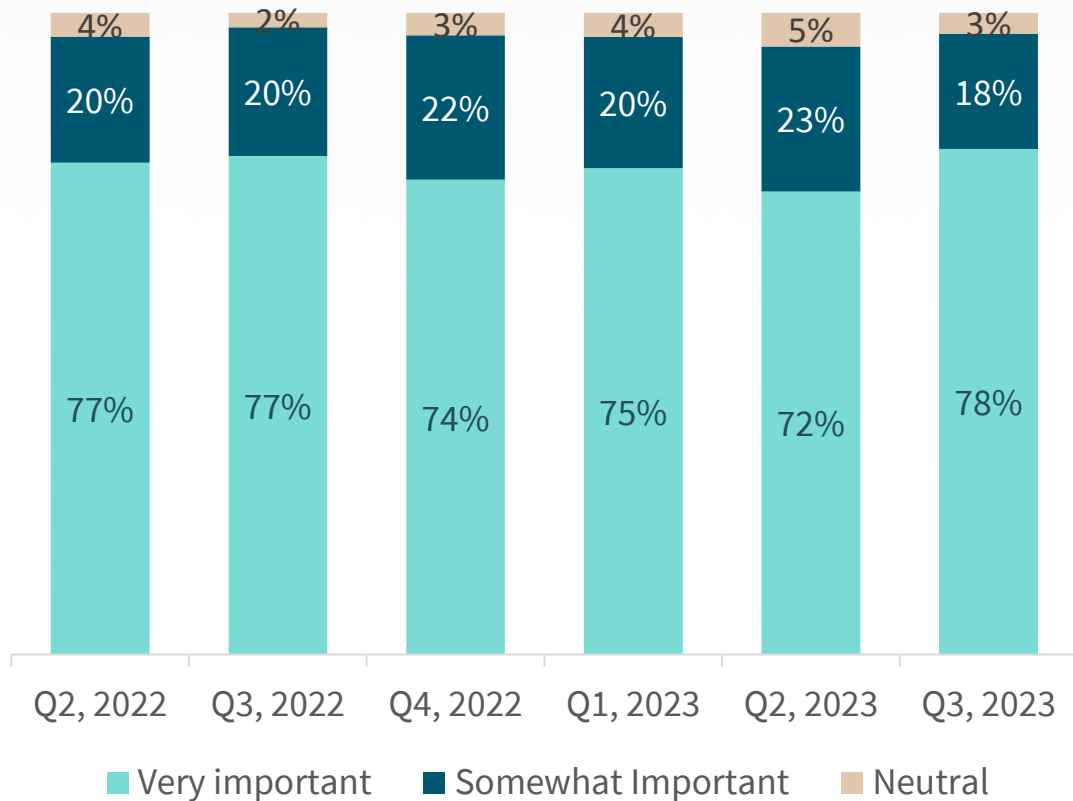
* Among those who have **participated in a digital exercise offering** in last 3 months

Nutrition

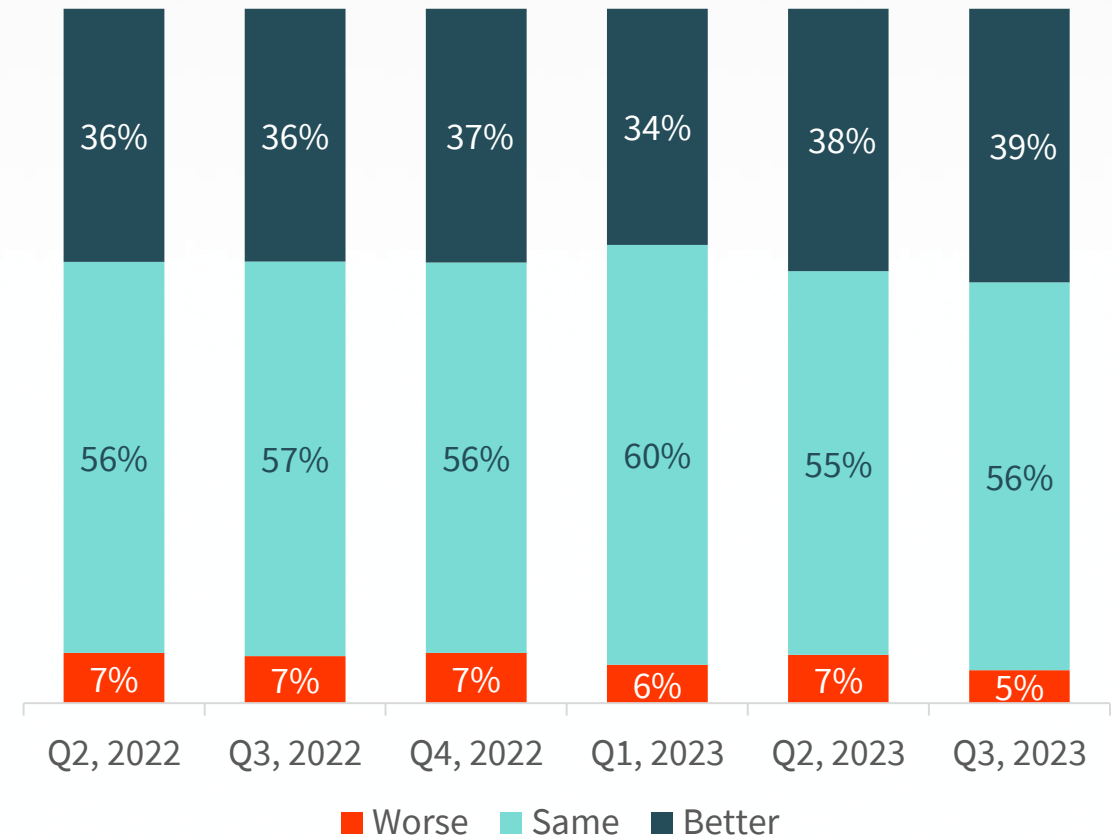
Now, let's talk about food and nutrition

Members' eating habits have remained relatively constant since the middle of last year

Importance of eating healthy food to one's health*

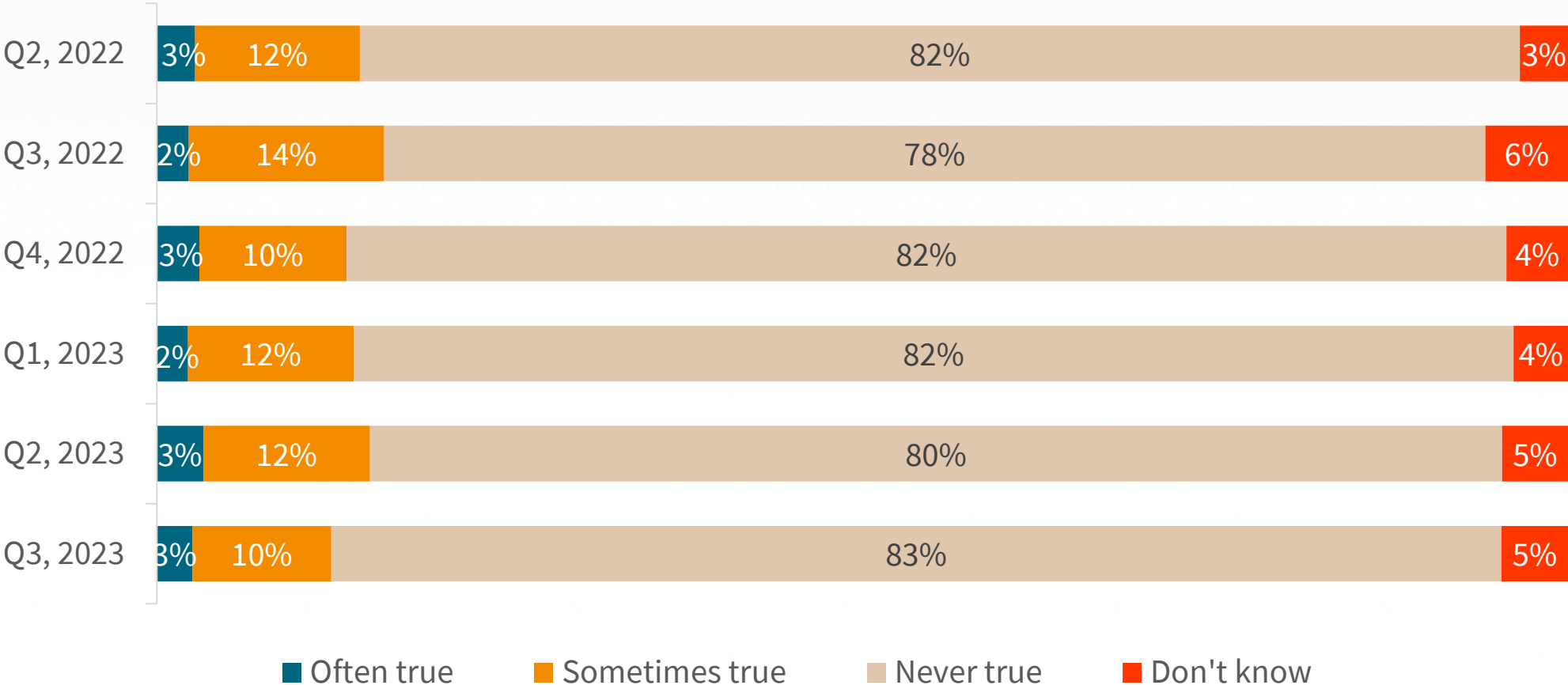


Eating habits compared to 3 months ago*



Similarly, the number of members who are concerned about their own food security has remained consistent since quarter 4 of 2022

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

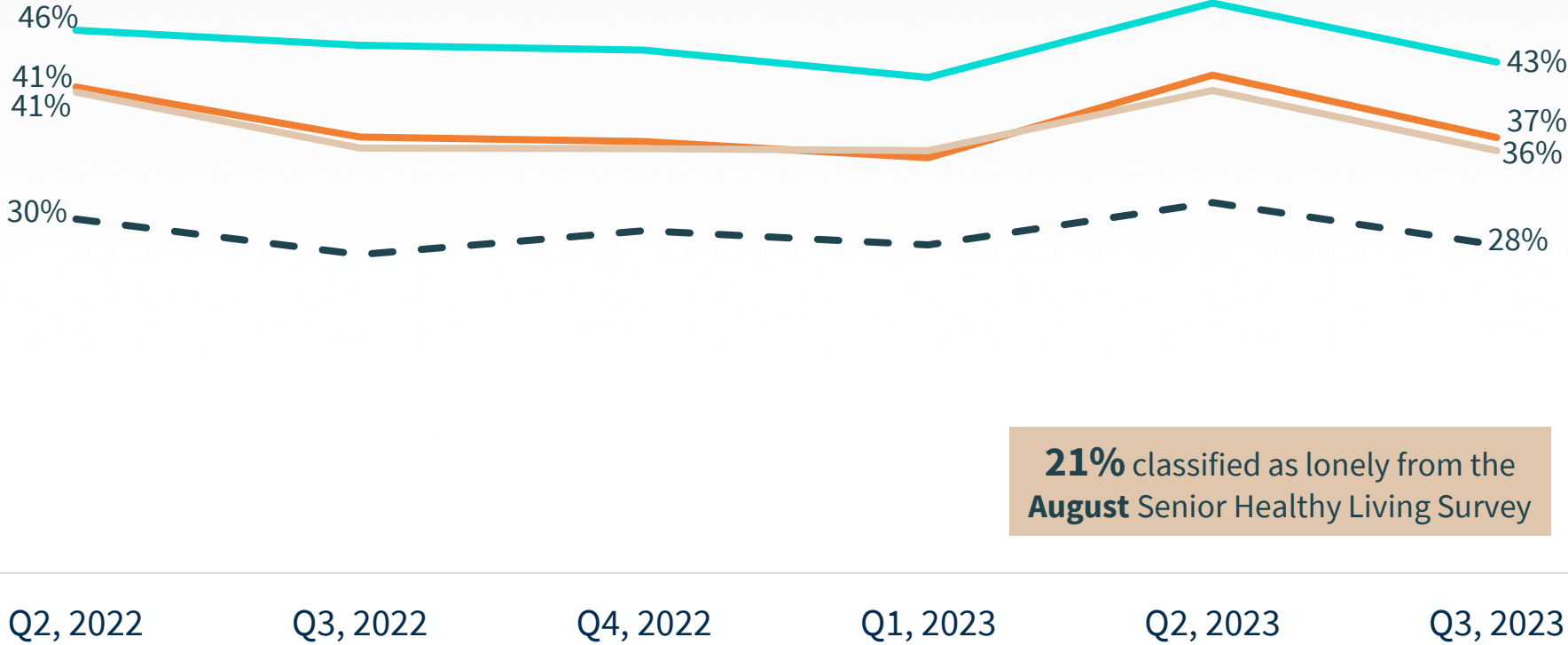


Social Connection

Now, let's talk about social connection

After an increase last quarter, fewer respondents report feeling left out, isolated from others, and lacking companionship at least some of the time

Percent of seniors who are lonely



21% classified as lonely from the **August** 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"

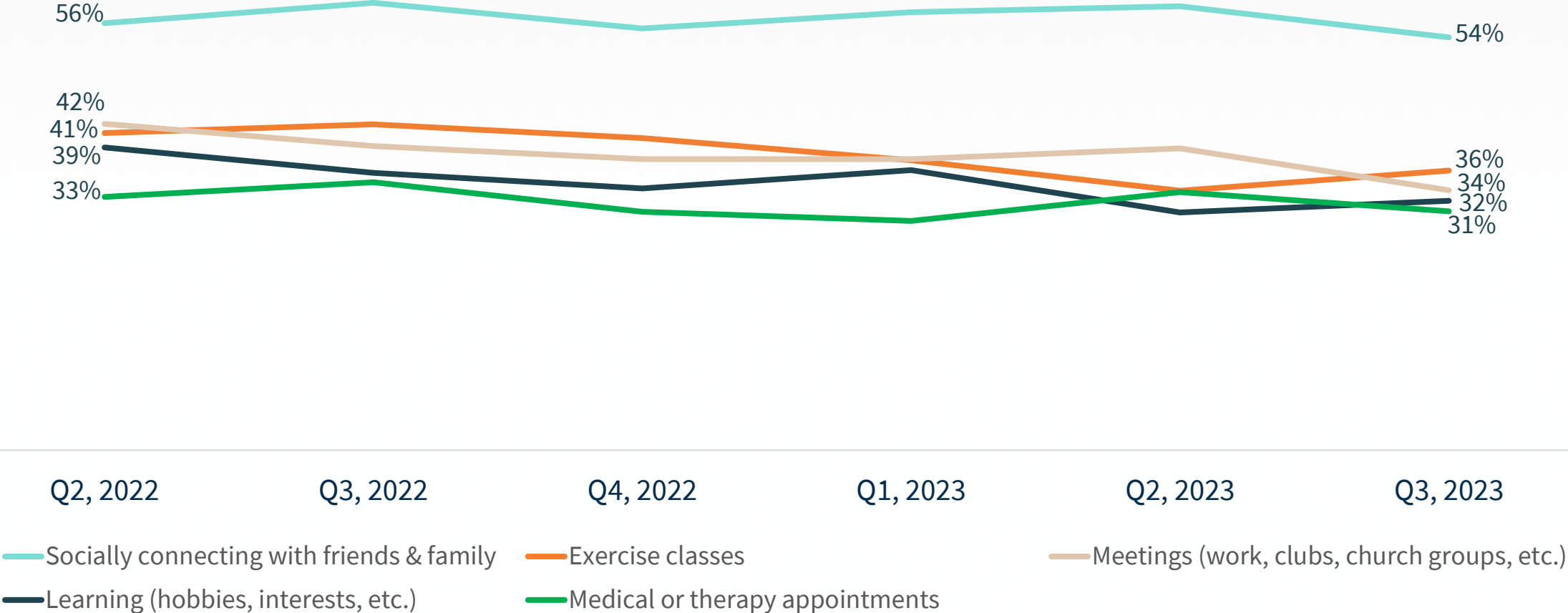
- Lack companionship
- Feel left out
- Feel isolated from others
- - - Feel lonely (UCLA loneliness scale)*

Showing often + Some of the time

Fewer respondents are digitally engaged with friends and family compared to last quarter

Also, fewer are using digital platforms for both work and social meetings

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

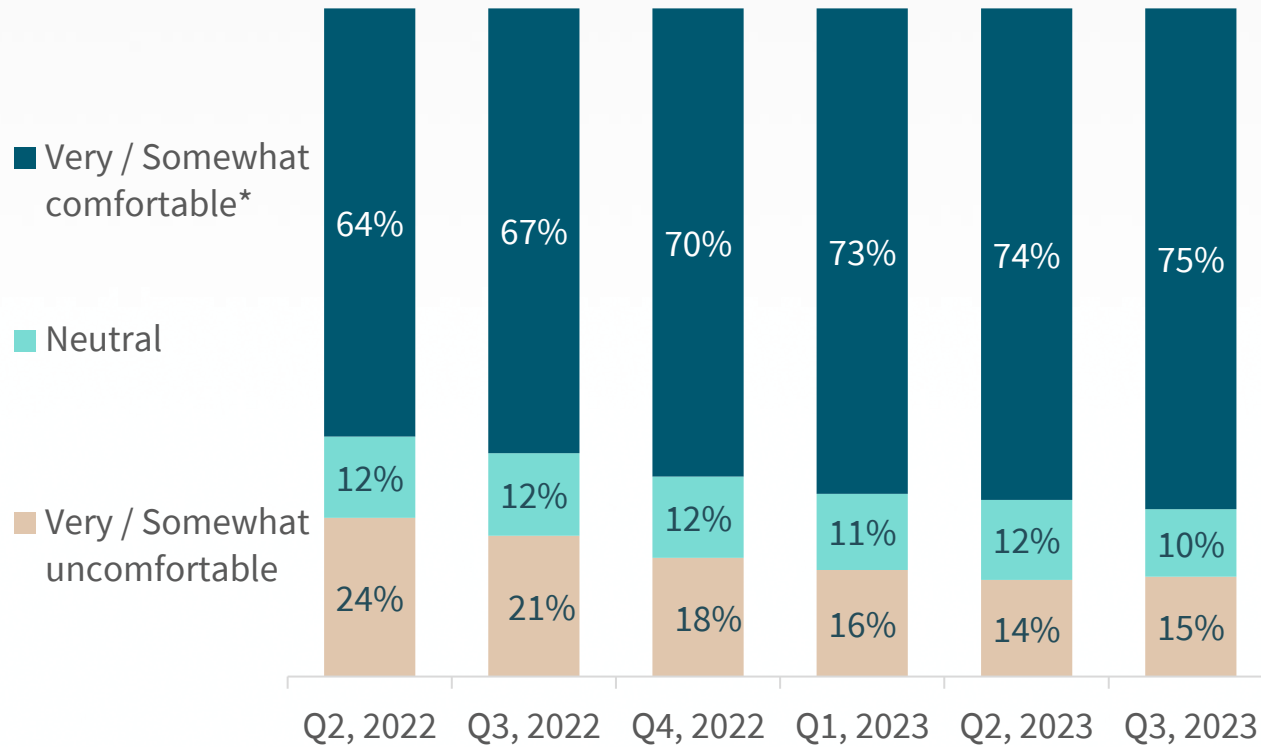


COVID-19 Perceptions & Attitudes

Now, let's talk about COVID-19

Concern for a Coronavirus outbreak increases from last quarter, but does not affect comfort levels socializing in public places

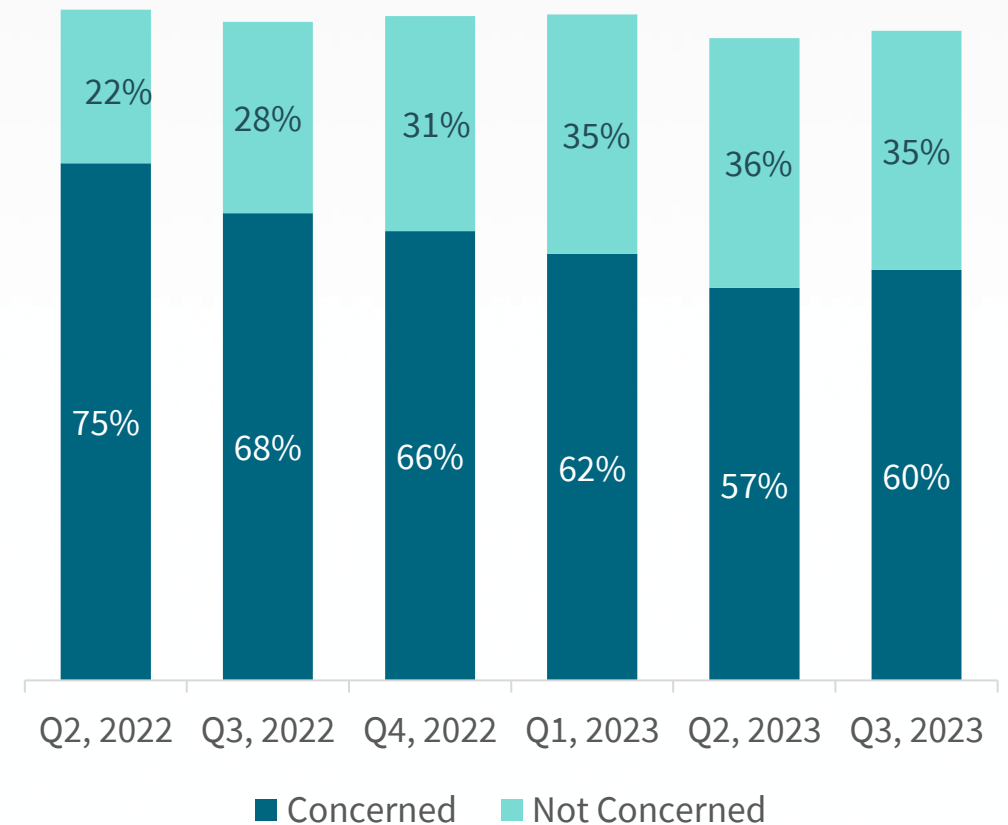
Comfort level socializing in public places*



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

* Based on a 5-point rating scale

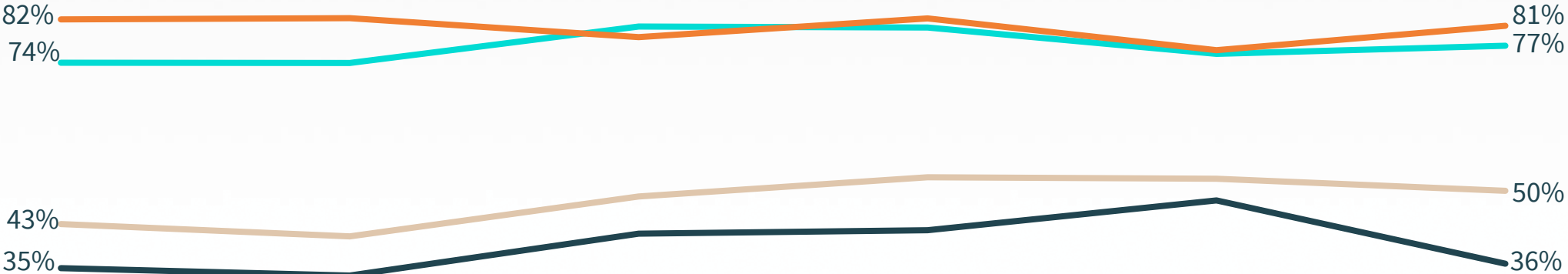
Level of concern for a Coronavirus outbreak**



* Based on a 4-point rating scale

Four out of five respondents continue to believe that dealing with surges of COVID-19 will be the new normal and daily life will not be disrupted

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



Q2, 2022 Q3, 2022 Q4, 2022 Q1, 2023 Q2, 2023 Q3, 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



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