
SilverSneakers Pulse Q4, 2023

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Tivity Health Consumer Insights
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Key Takeaways

1

Self-motivation remains **important** as ever to drive **improvement** in **physical activity**. As the **weather cools** it has a **larger impact** in determining levels of **physical activity**.

2

A **higher proportion** of members, **(47%)** are active in **SilverSneakers digital offerings** compared to the previous two quarters but still **below quarter 1 of 2023, (53%)**.

3

Overall **concern** for a **COVID-19 outbreak** is at its **lowest level, (56%)**, since tracking began while comfort levels socializing in public remain at historically high levels. However, members who **do not belong to a gym or community center** that offers SilverSneakers cite **COVID more** as a **barrier for not joining**.

Objectives & Methodology



Survey via SilverSneakers
Newsletter



546 total responses
received



Fieldwork period:
November 16th – 22nd, 2023

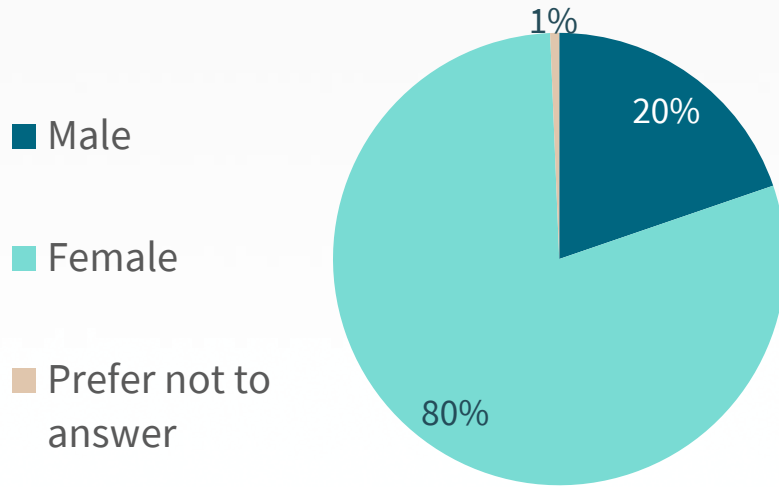
Objectives:

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

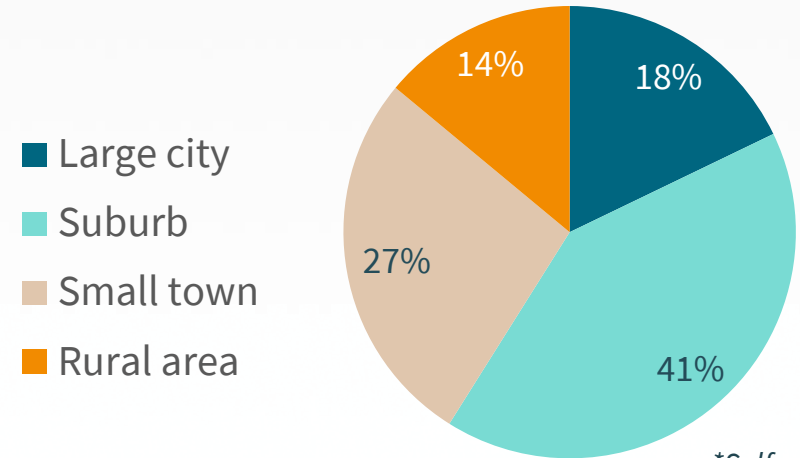
- Current exercise habits
- Current and perceived future digital fitness consumption
- Current nutrition habits
- Food insecurity perceptions
- Impact of COVID-19 on daily life
- Social connection

Respondent Profile – Quarter 4, 2023

Gender

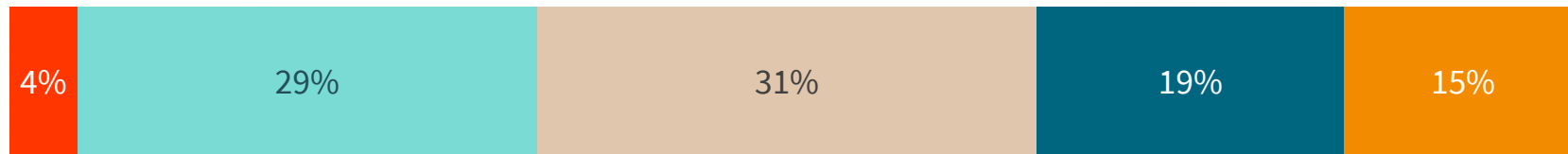


Urbanicity*



*Self-reported

Age



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

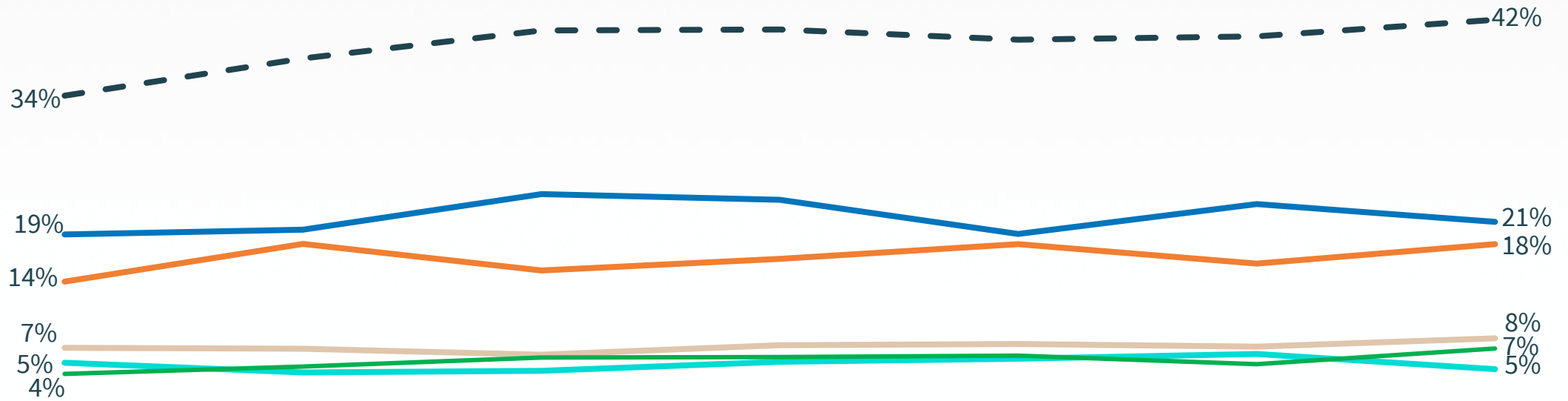
No answer : 2%

Fitness & Physical Activity

Now, let's talk about physical activity

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

Current physical activity - Gym



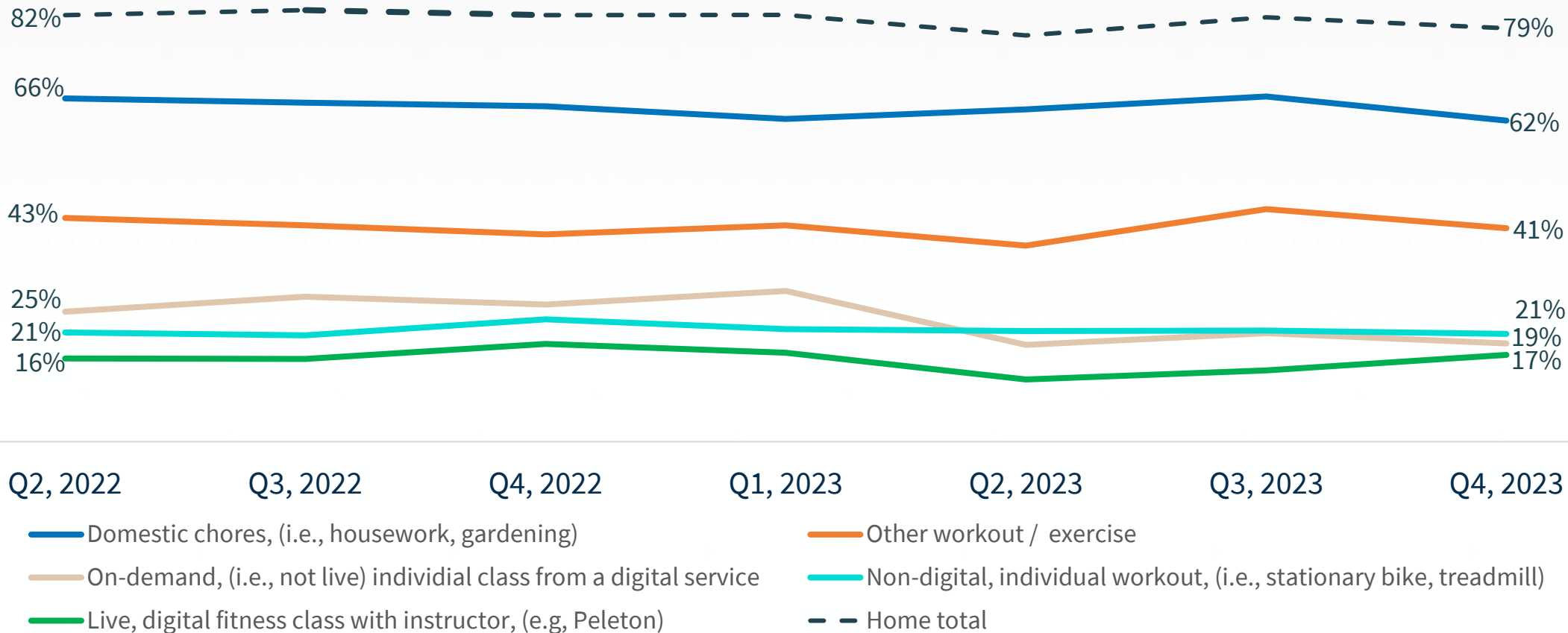
Q2, 2022 Q3, 2022 Q4, 2022 Q1, 2023 Q2, 2023 Q3, 2023 Q4, 2023

- 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, Q4, 2023: 91%

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

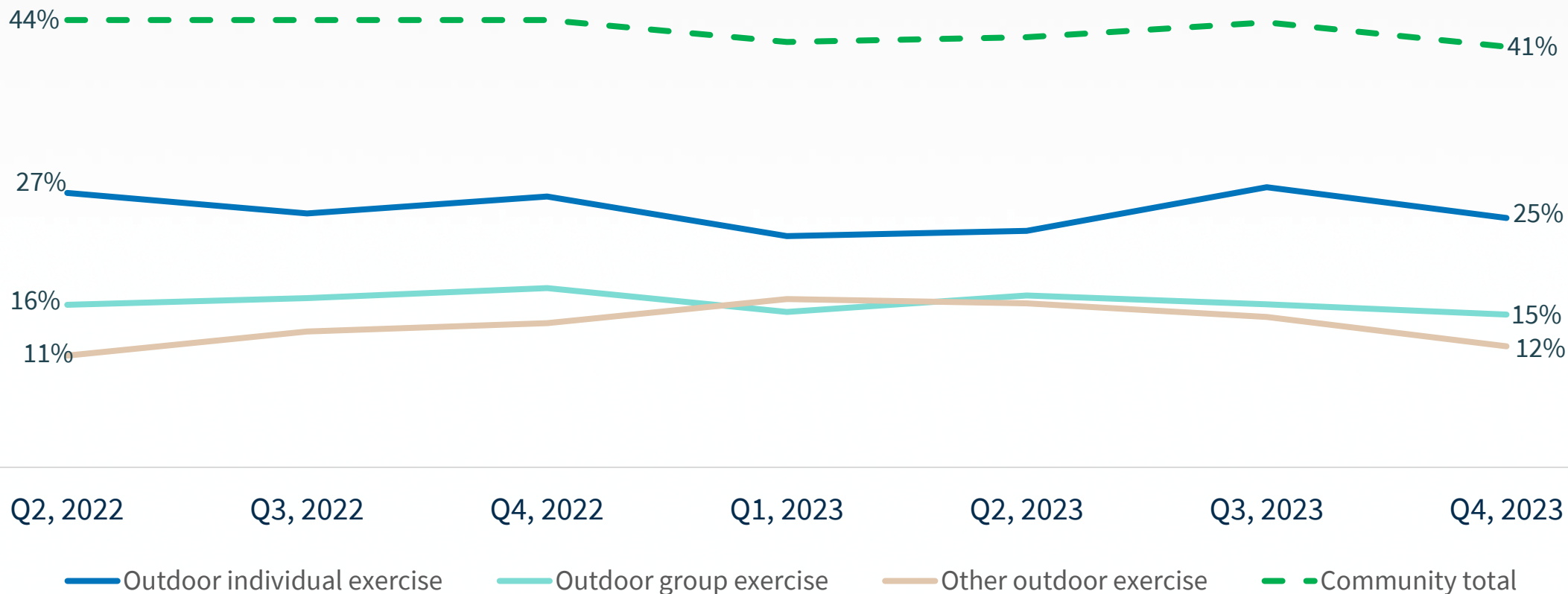
Current physical activity - Home



All physical activity, Q4, 2023: 91%

Fewer members participated in outdoor activities compared to quarter 3

Current physical activity - Community

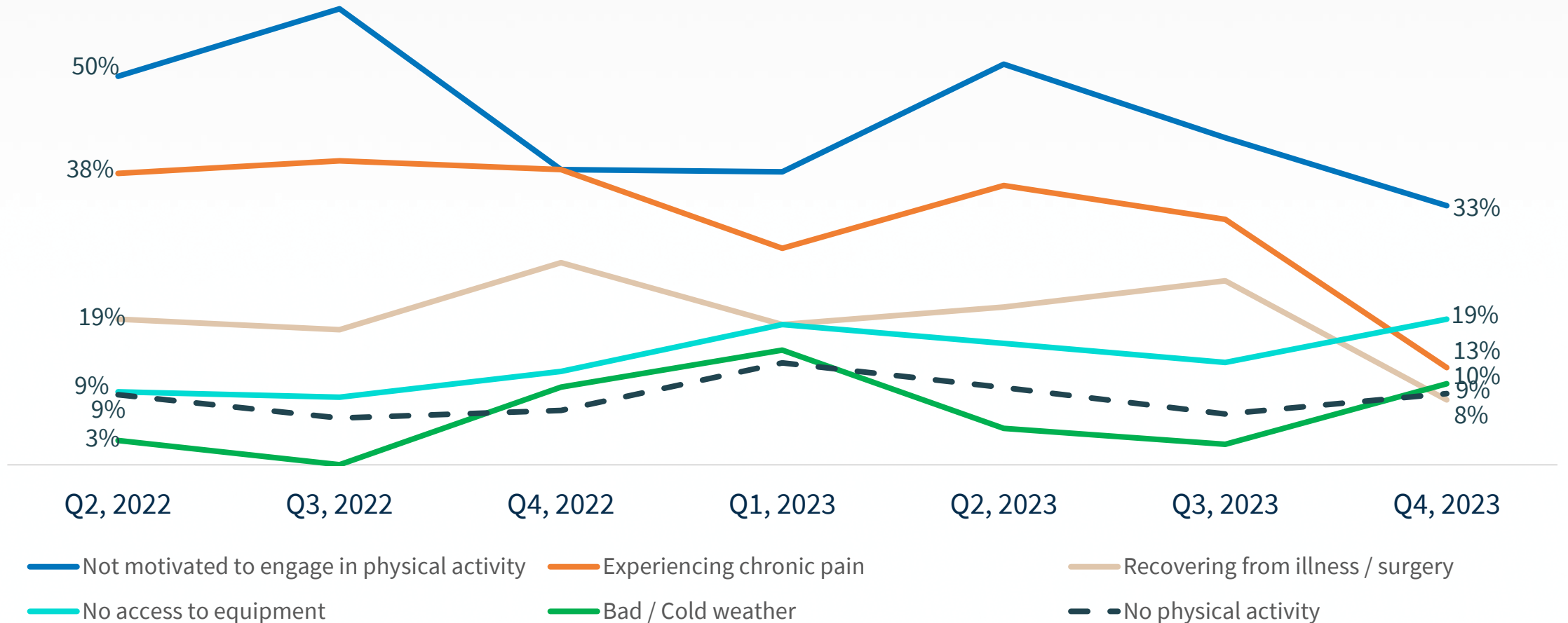


All physical activity, Q4, 2023: 91%

Lack of motivation and chronic pain continue to decline as reasons for physical inactivity compared to previous quarters

One in five members have no access to equipment, one in ten citing weather/the season

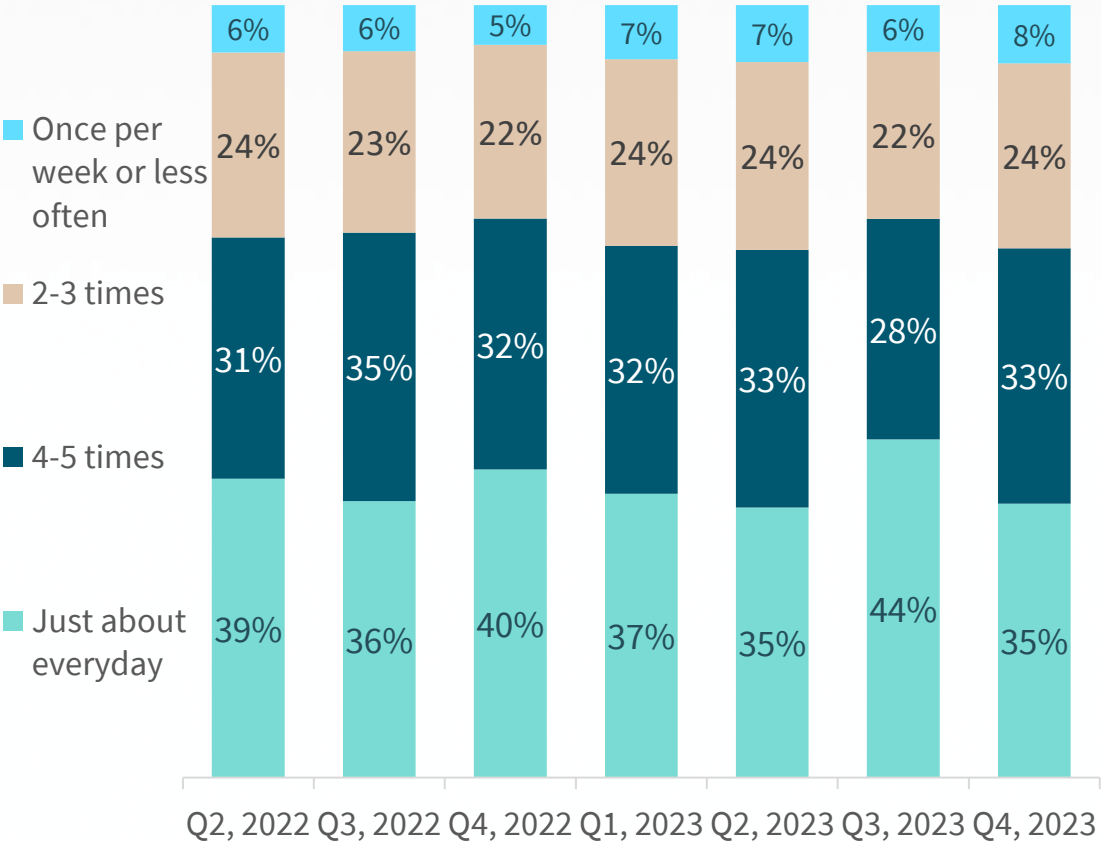
Main reasons for no physical activity*



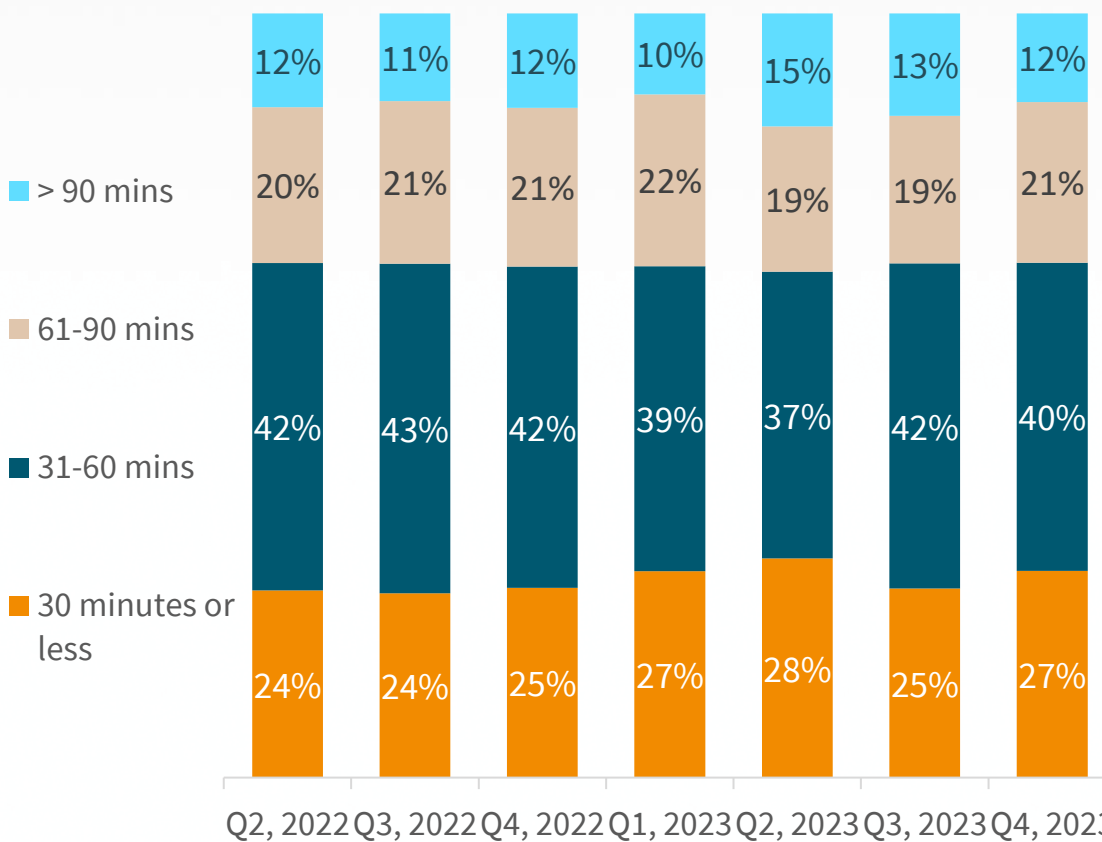
* Caution: Results should be treated directionally due to small base size

About two-thirds of 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



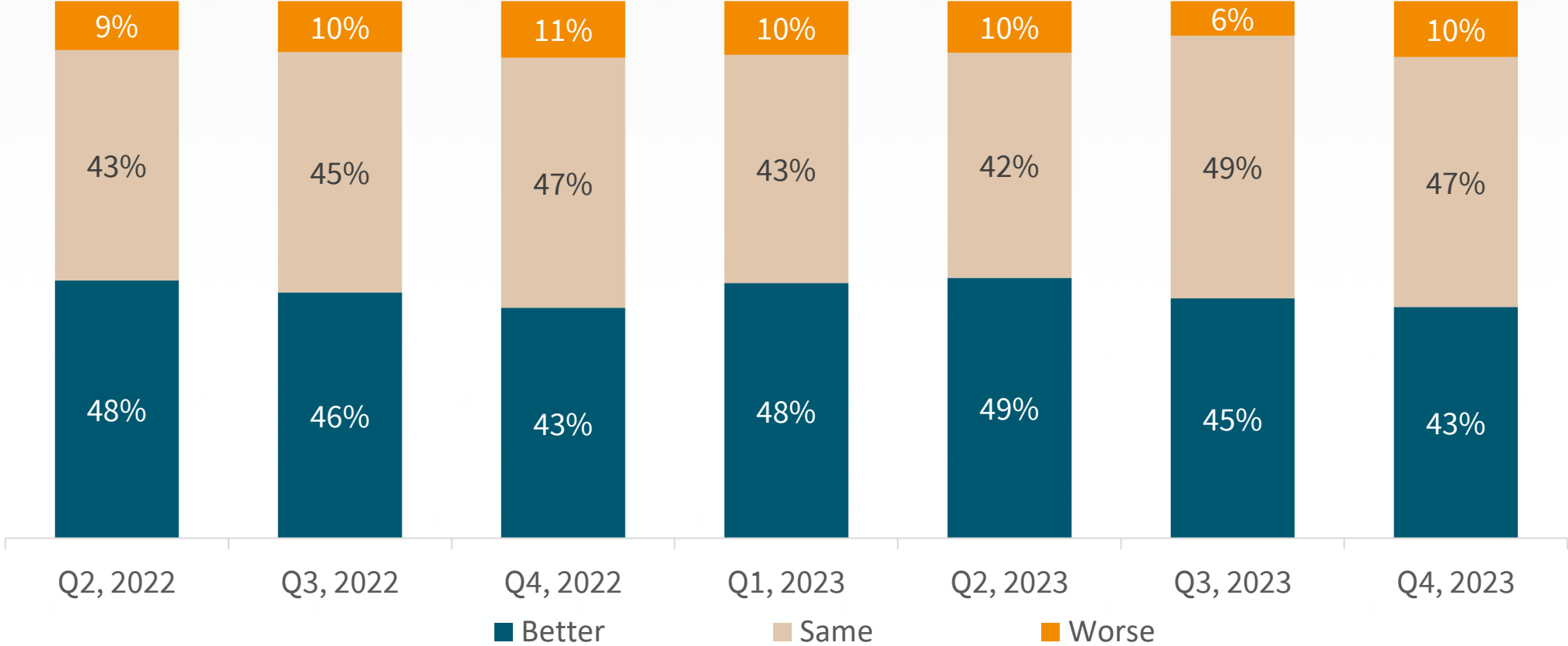
Physical activity – Time spent per day



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?

Fewest members rate their physical activity better than the three months prior, compared to anytime in 2023

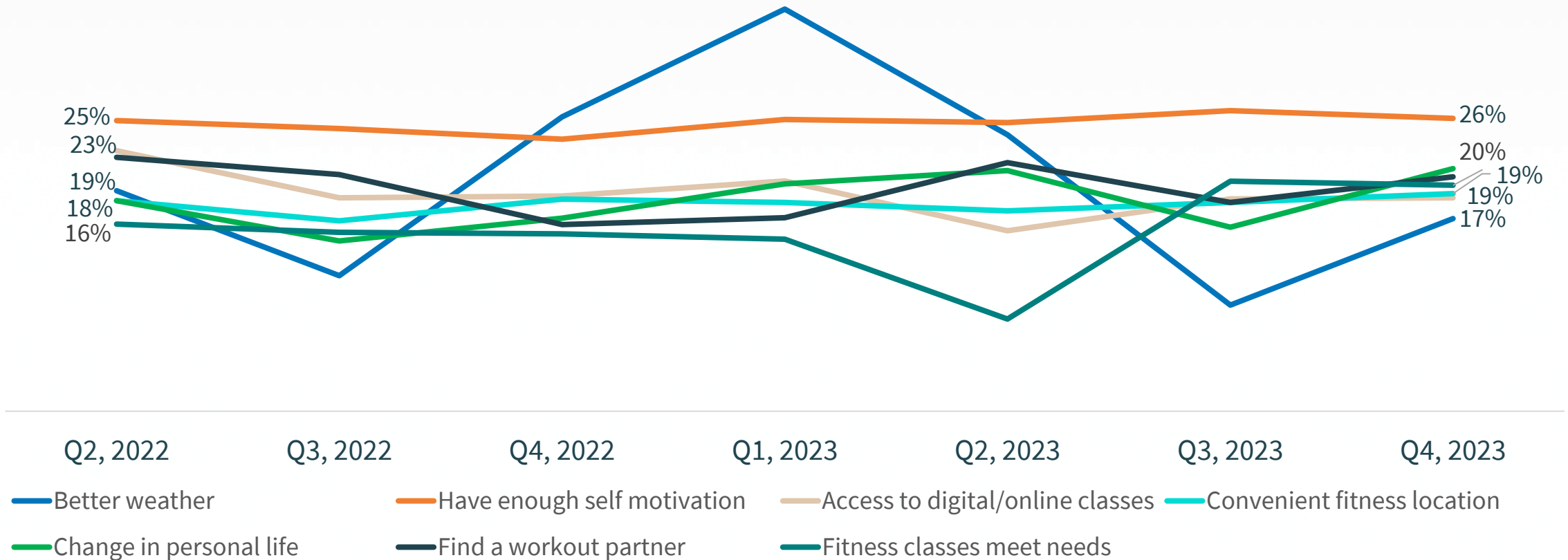
Level of physical activity versus 3 months ago



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

As temperatures trend colder the weather becomes more important in determining levels of physical activity

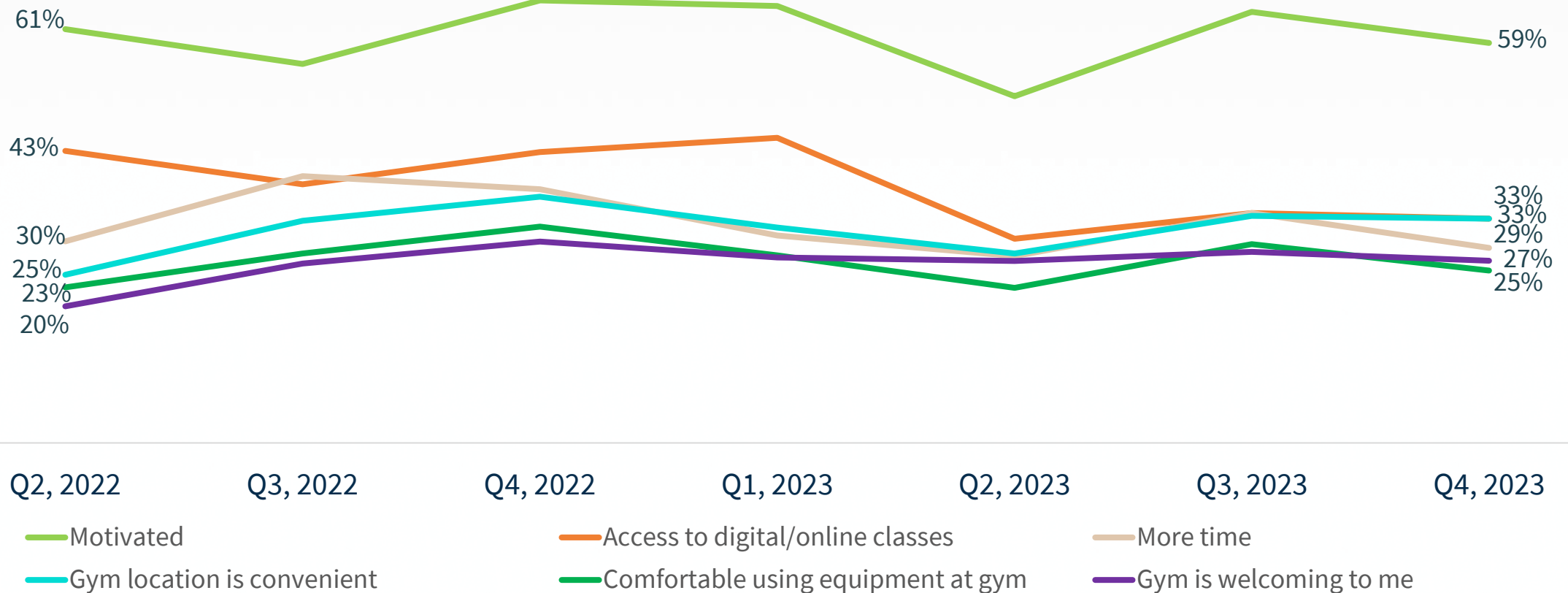
Main factors that will help increase physical activity time*



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

Six in ten respondents mention self-motivation as a key driver for improvement in their physical activity

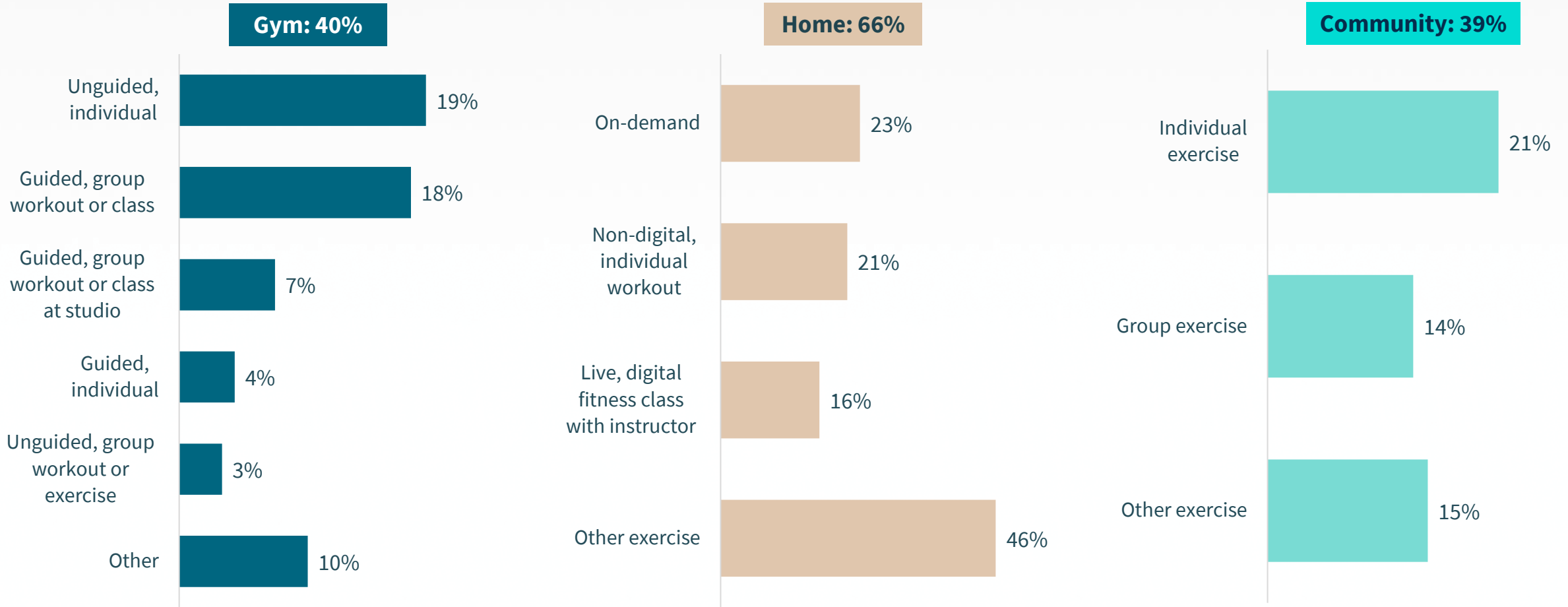
Main reasons for improvement in physical activity



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

Two out of three members' fitness regimen occurs in the home, with similar portions across gym and community

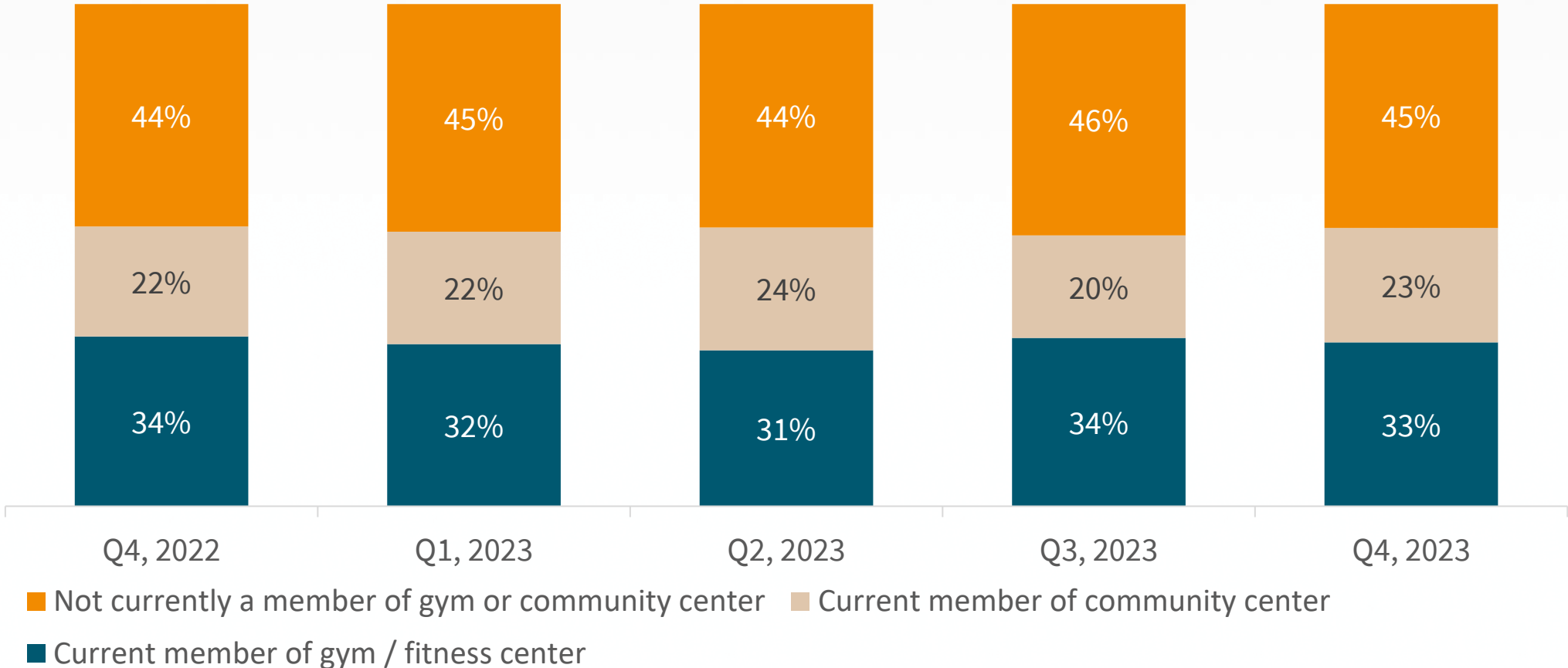
Current fitness activity



All fitness activity, Q4, 2023: 88%

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

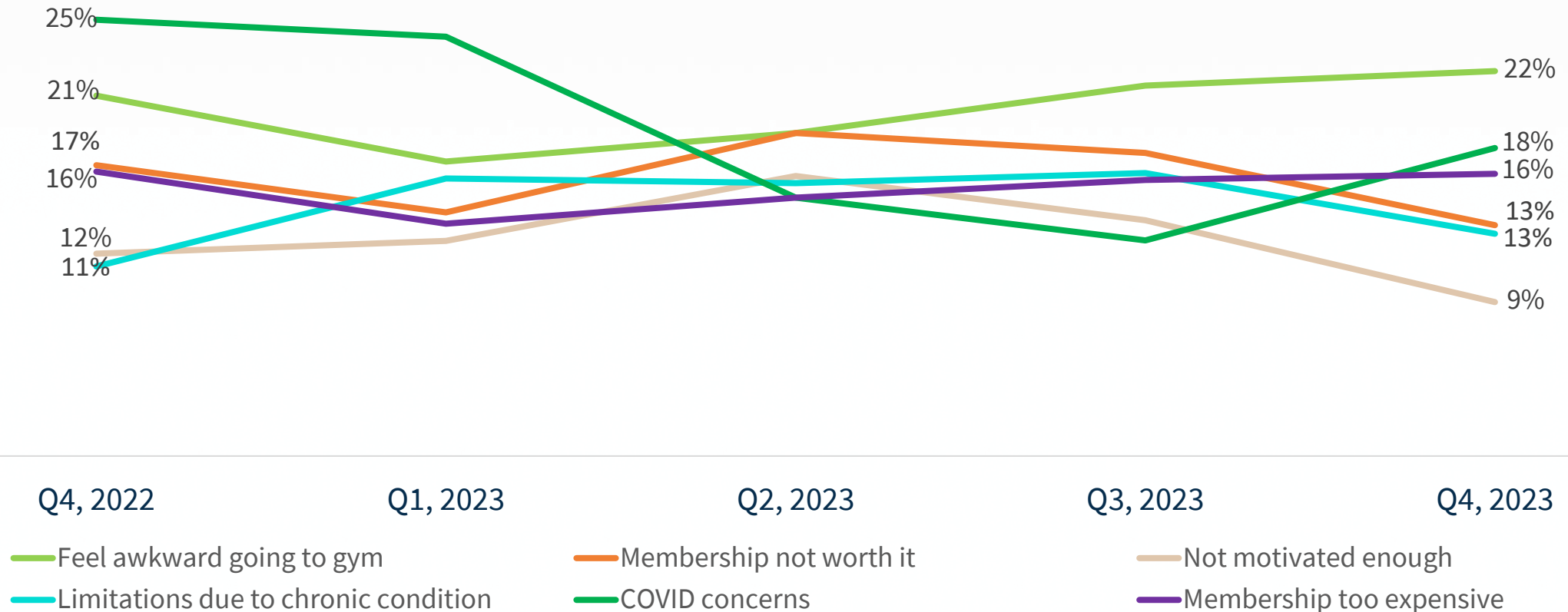
Gym / community center membership



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

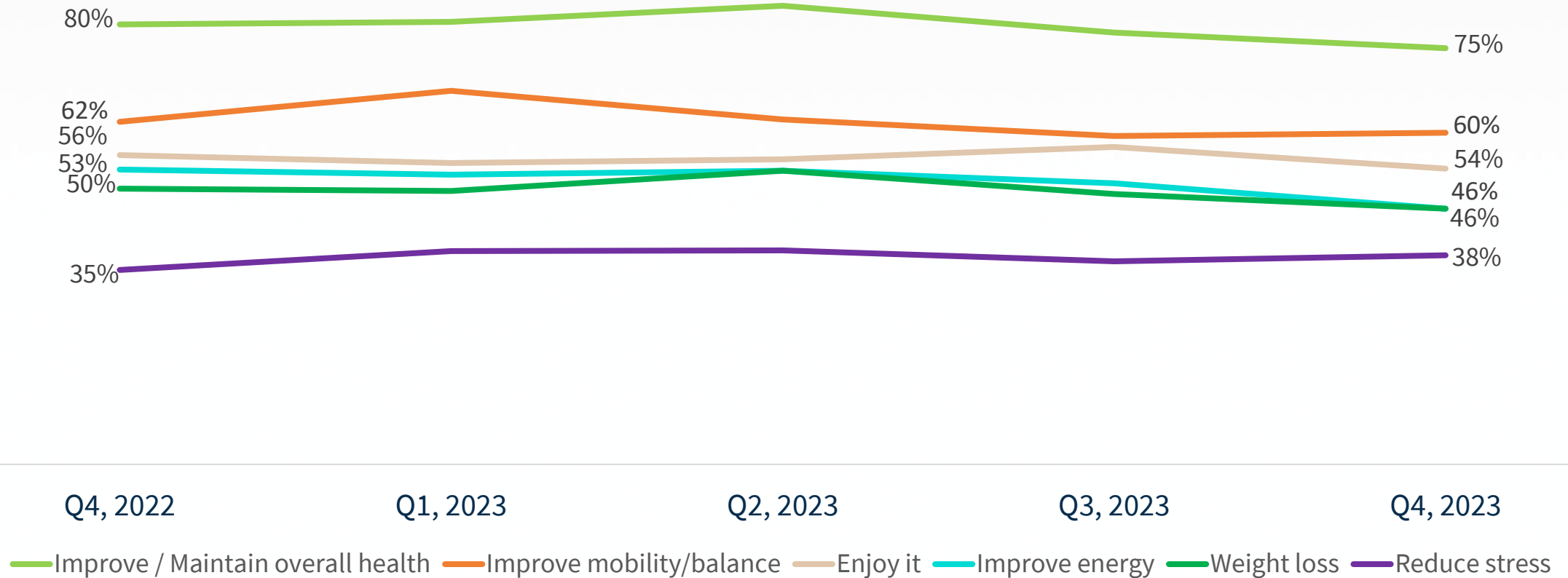
Concerns about COVID has gained in importance in prohibiting respondents from joining a gym or community center that offers SilverSneakers

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



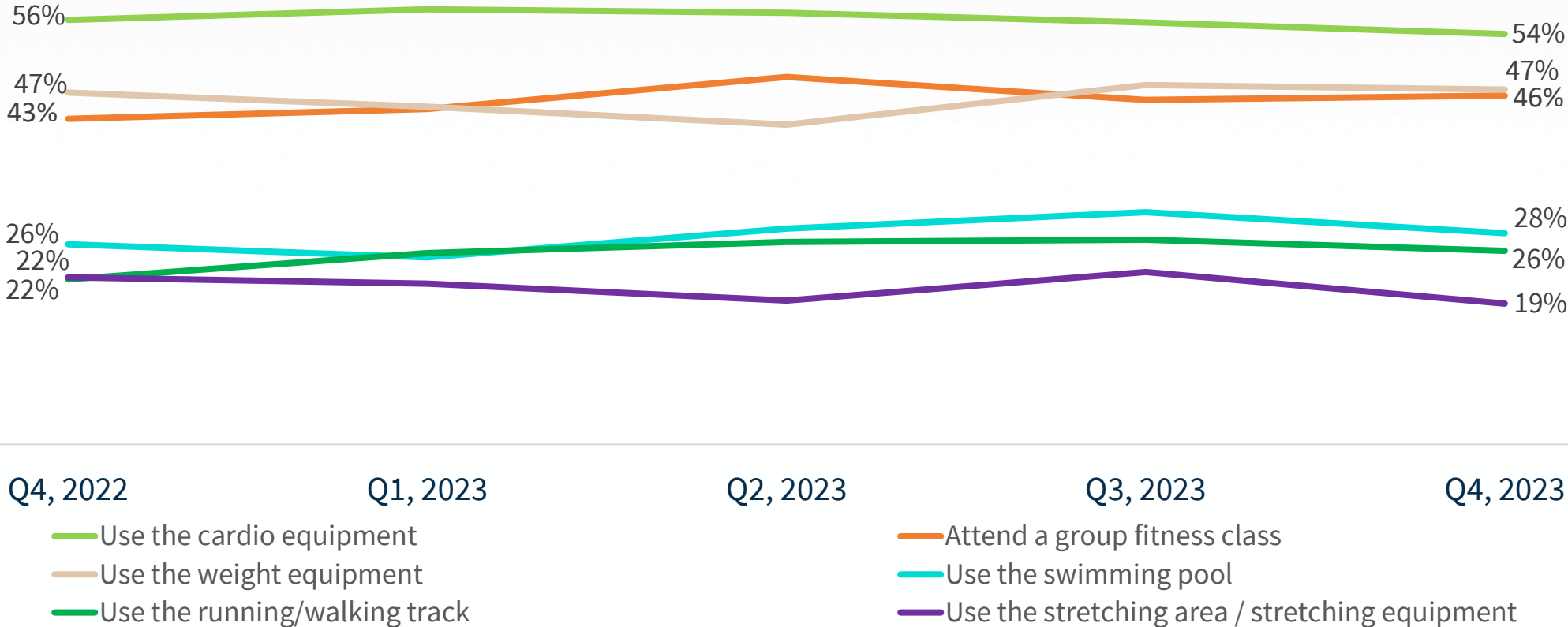
Maintaining or improving health and improving balance continue as the primary reasons for joining a gym that offers SilverSneakers

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



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

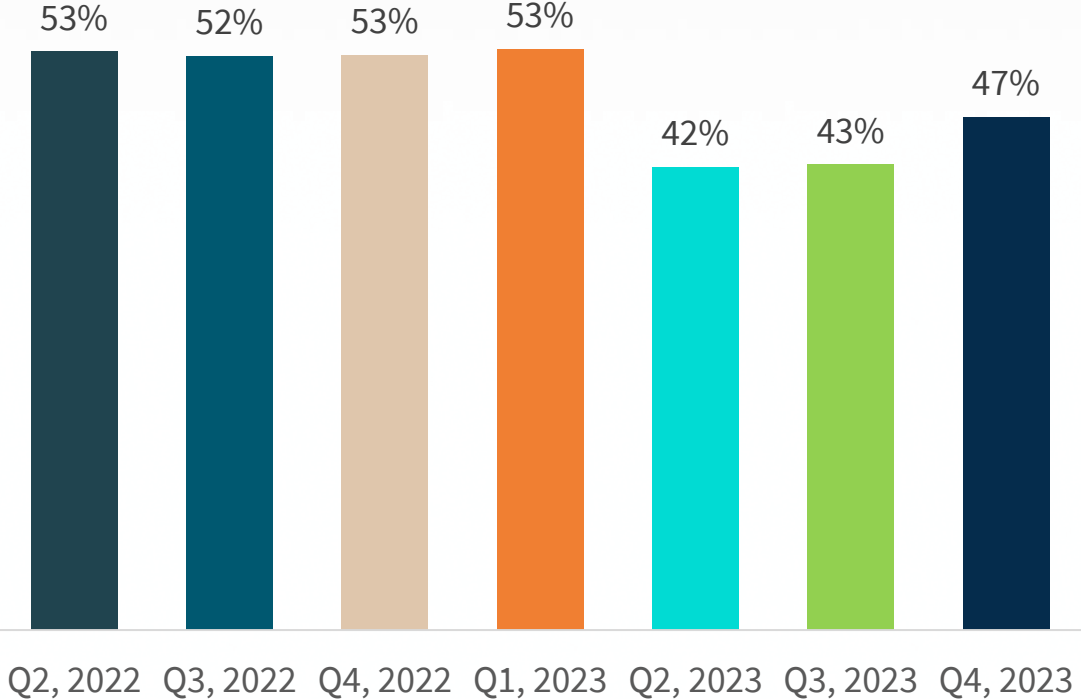
Activities participated at gym / community center that offers SilverSneakers



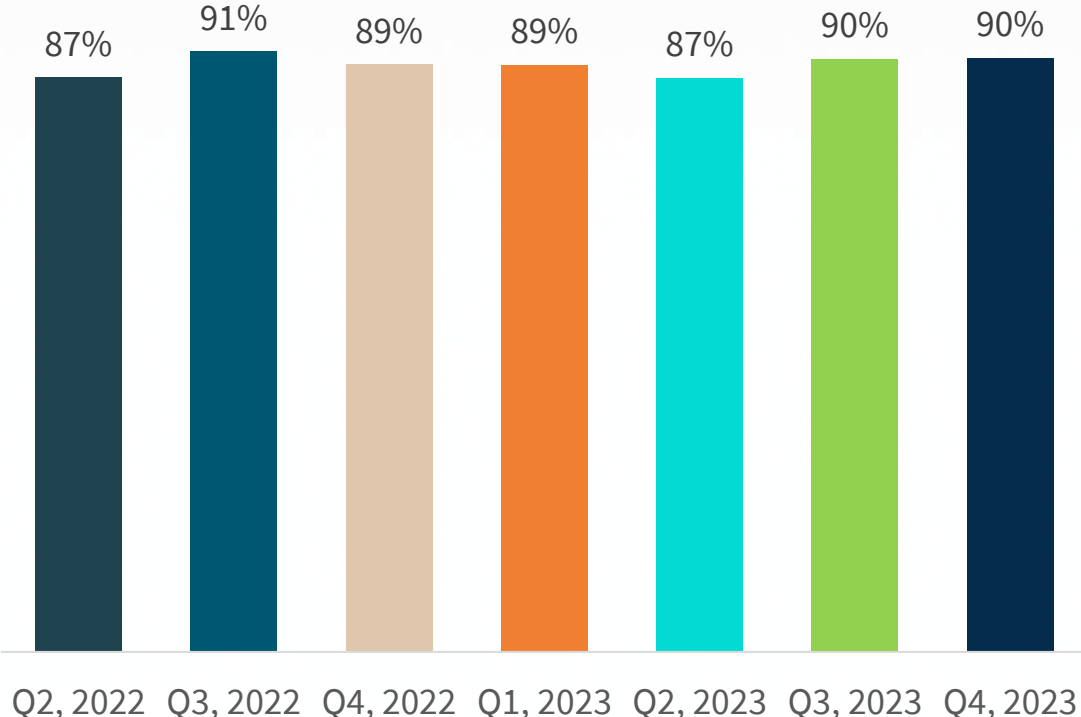
The proportion of members active in SilverSneakers digital offerings is higher than the previous two quarters

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

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



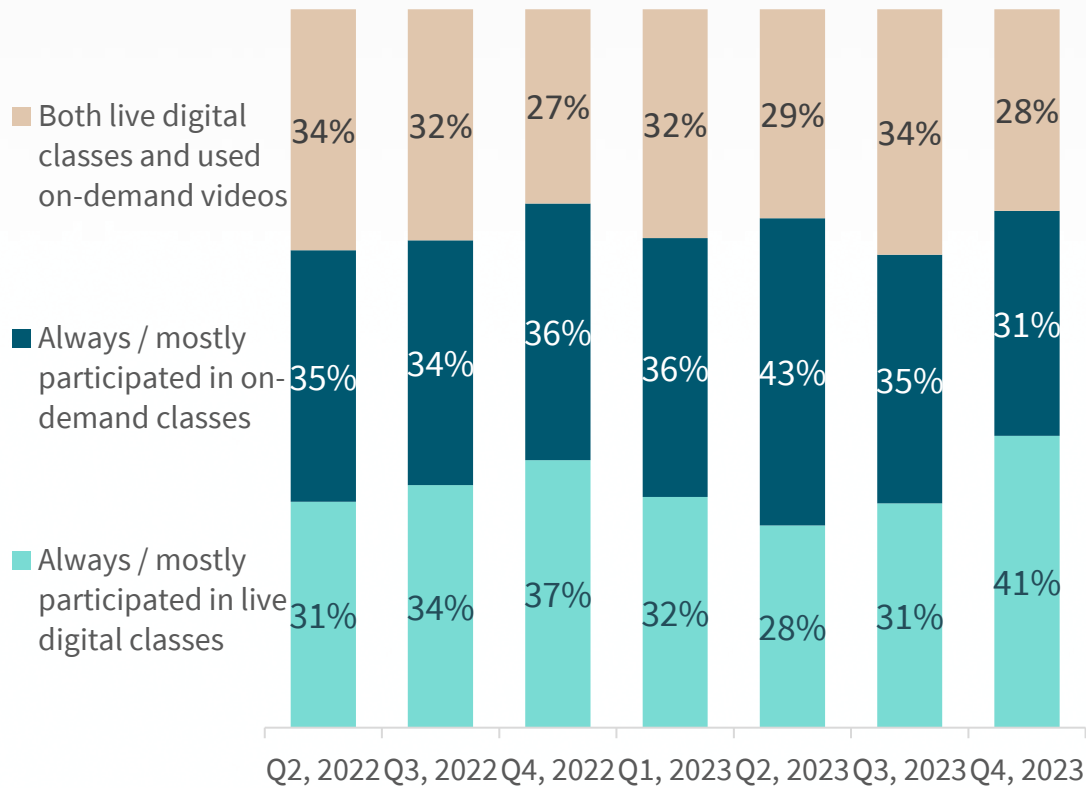
Continue using SilverSneakers digital offerings, (% 'Yes')



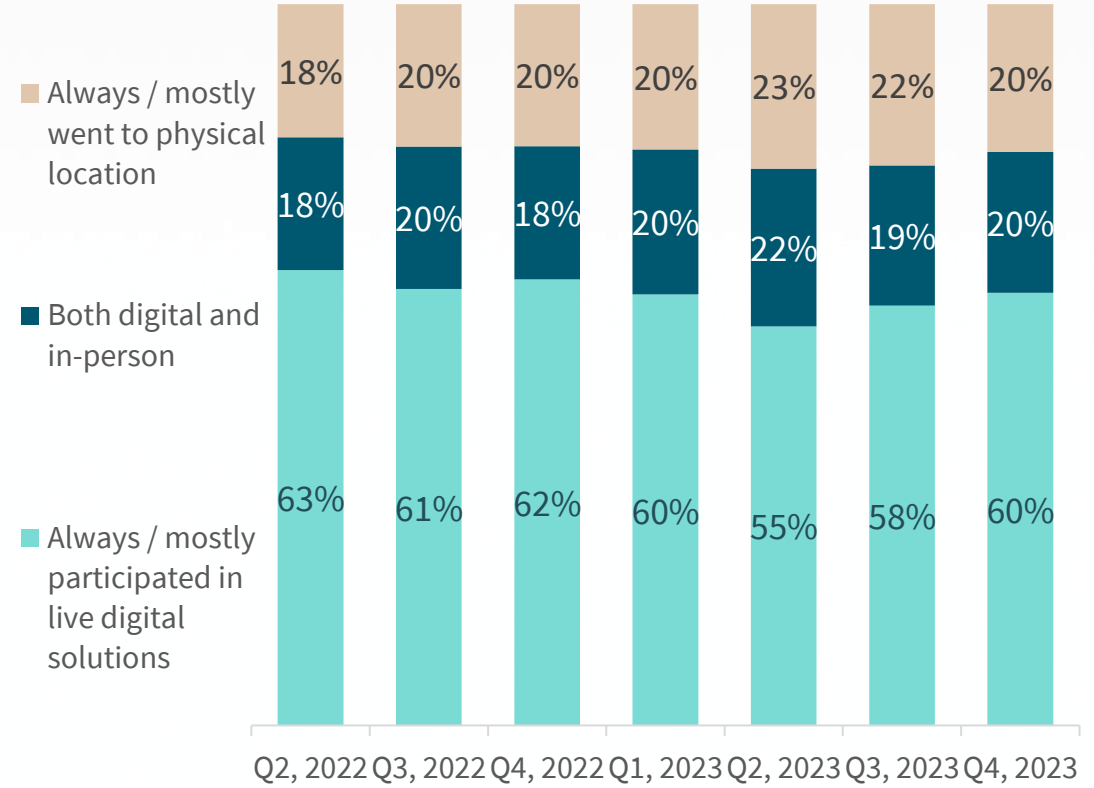
These digital users are watching fewer on-demand videos than at anytime since tracking began

Four in ten digital users continue to exercise in-person

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



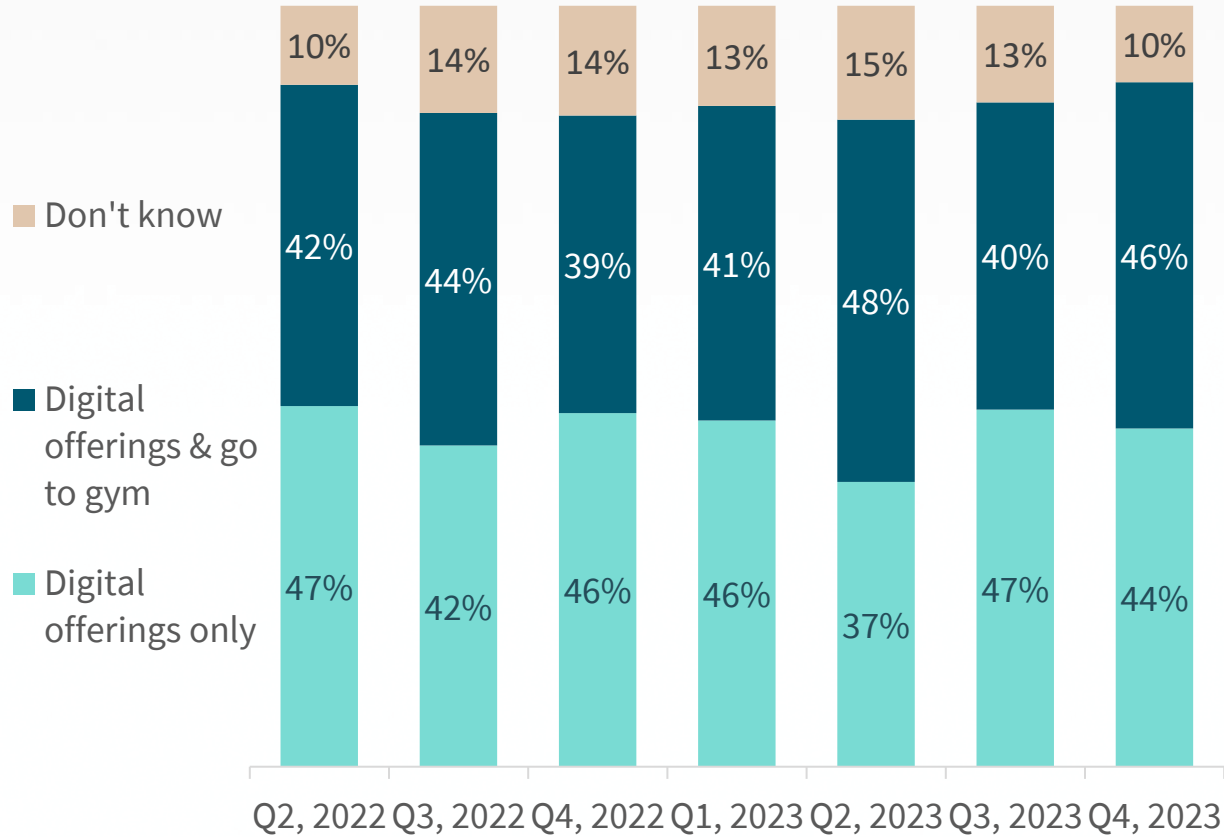
**Exercise routine in last 3 months:
In-person Vs. Digital***



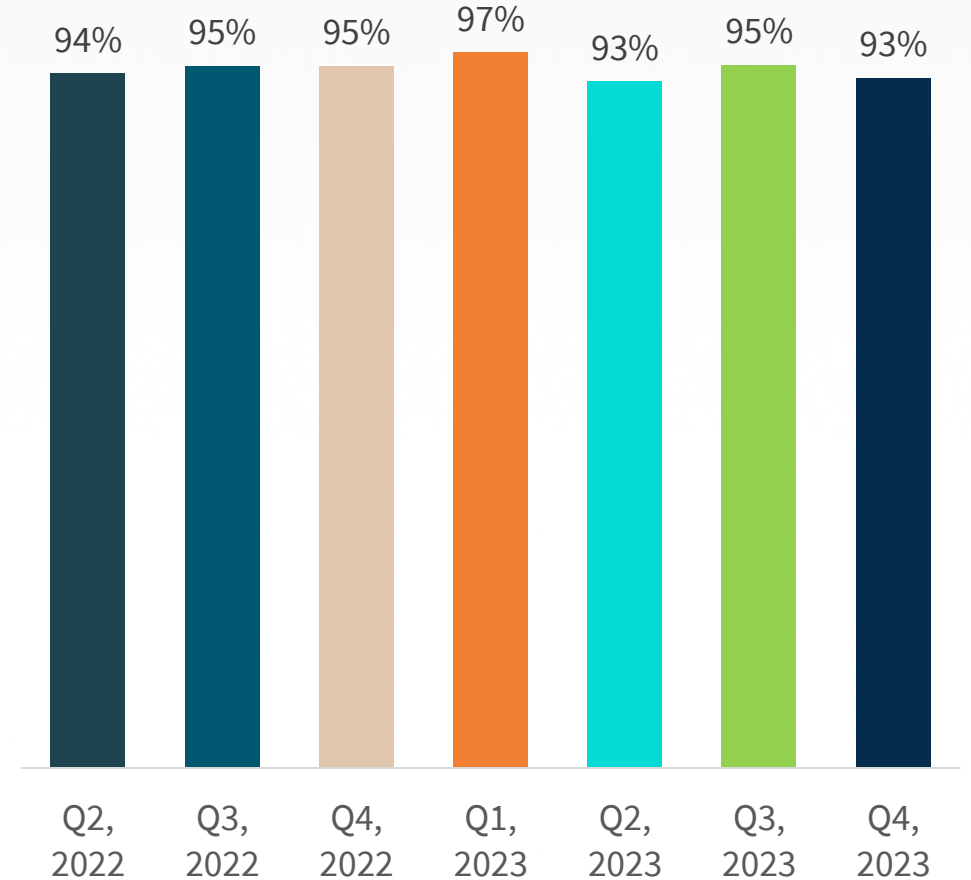
* Among those who have **participated in a digital exercise offering** in last 3 months

A similar number of digital fitness users intend to utilize digital offerings only and go the gym as well in Quarter 4

Future digital and in-person mix*



Plan to exercise in next 3 months*



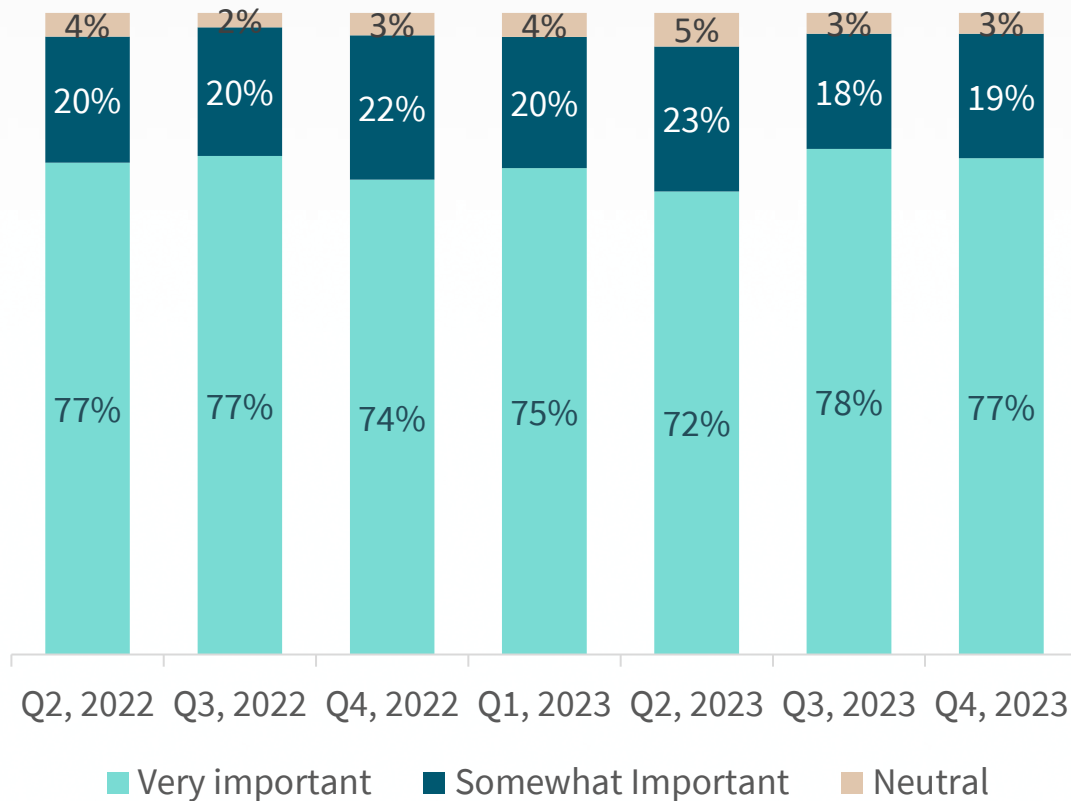
* Among those who have **participated in a digital exercise offering** in last 3 months

Nutrition

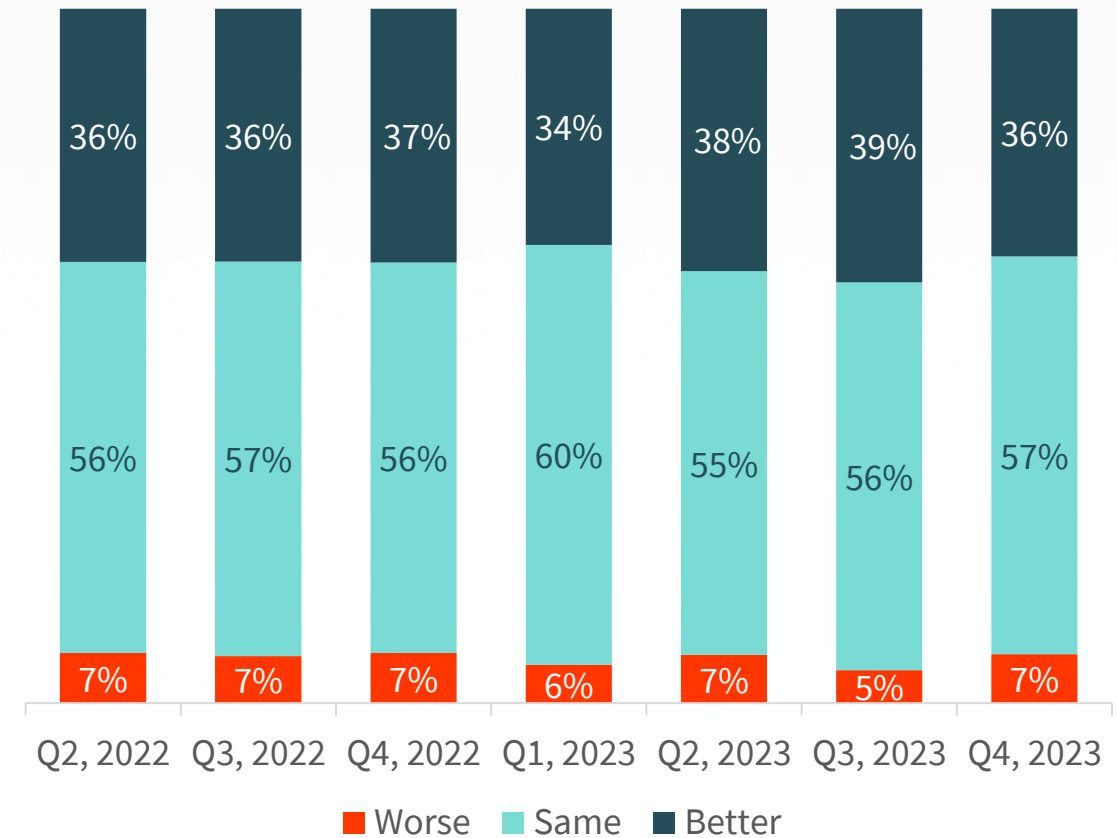
Now, let's talk about food and nutrition

Members' eating habits remain constant since the middle of last year

Importance of eating healthy food to one's health*

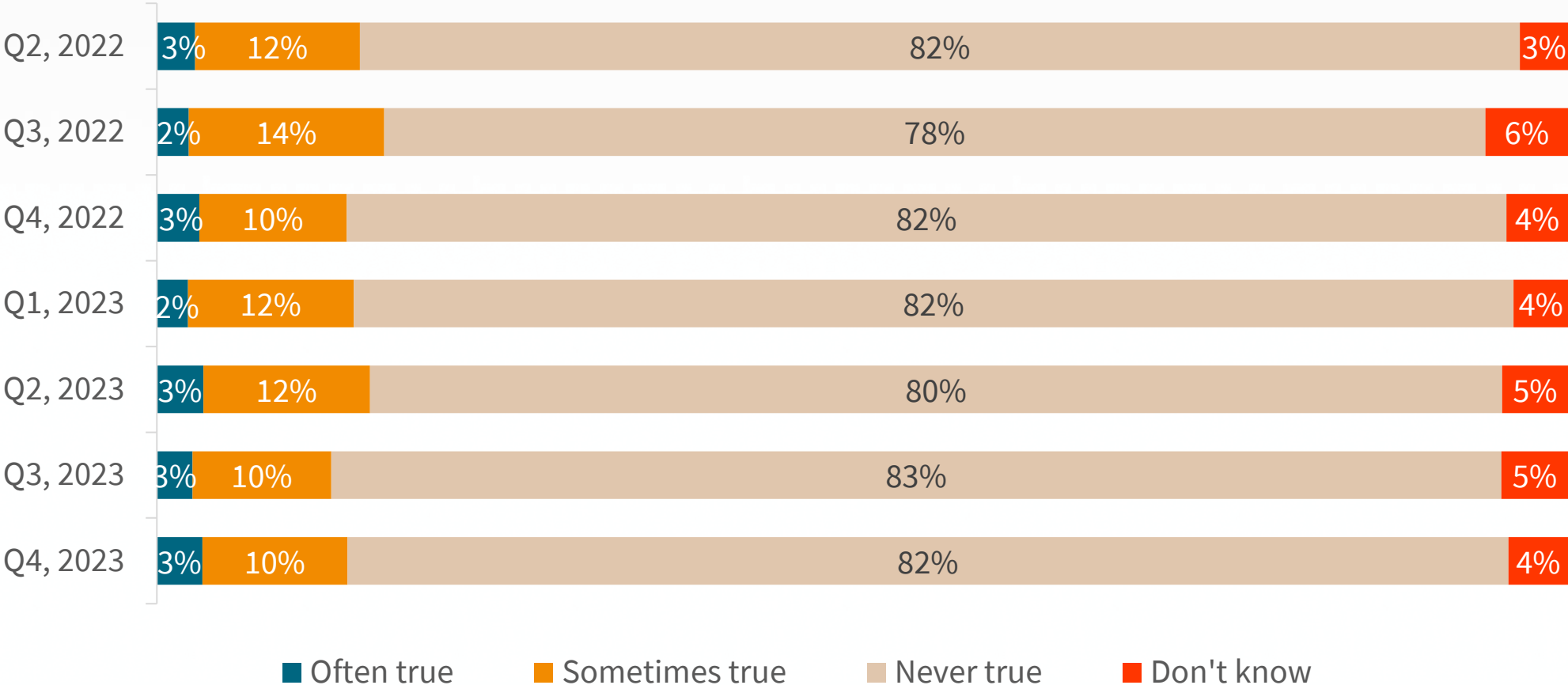


Eating habits compared to 3 months ago*



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

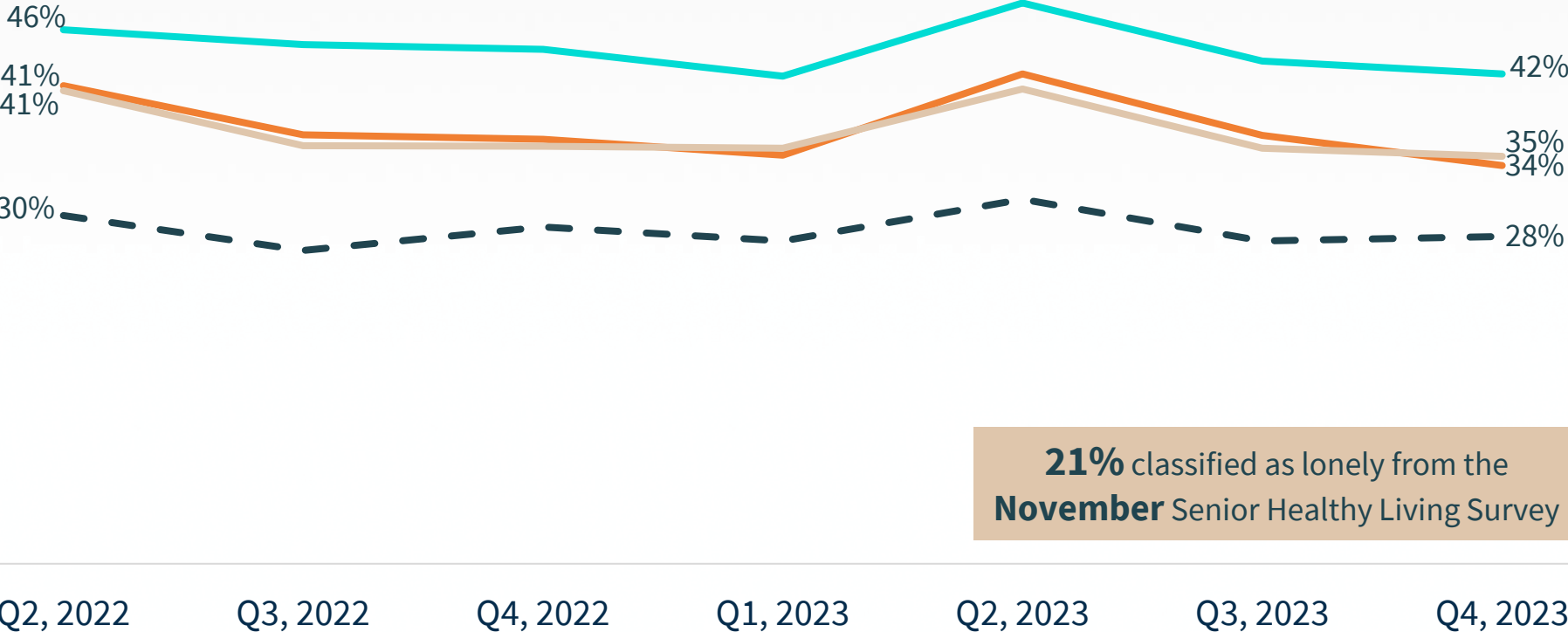


Social Connection

Now, let's talk about social connection

A similar proportion of members report feeling left out, isolated from others, and lacking companionship at least some of the time, compared to the last 3 months

Percent of seniors who are lonely



*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"

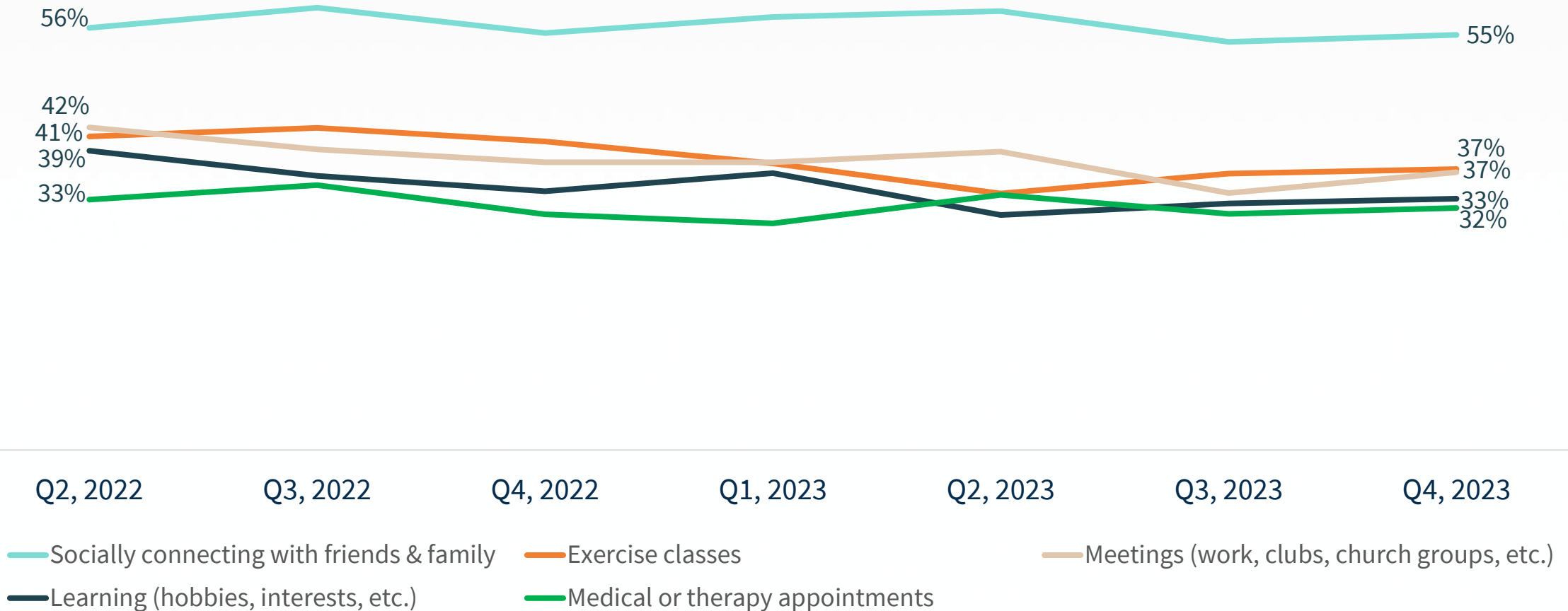
21% classified as lonely from the **November** Senior Healthy Living Survey

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

Showing often + Some of the time

More than half of respondents remain digitally engaged with friends and family

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

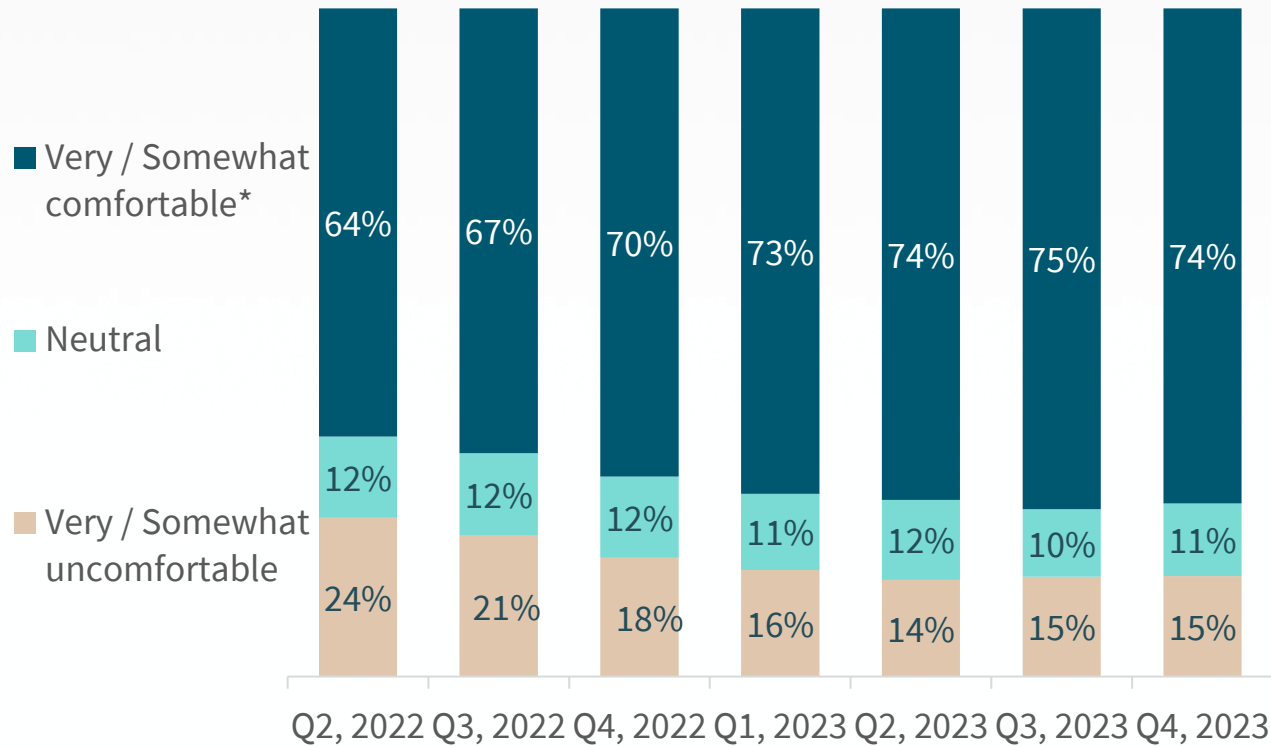


COVID-19 Perceptions & Attitudes

Now, let's talk about COVID-19

Concern of covid outbreak at its lowest since tracking began, while comfort levels socializing remains historically high, and yet members still citing covid more for not attending the gym

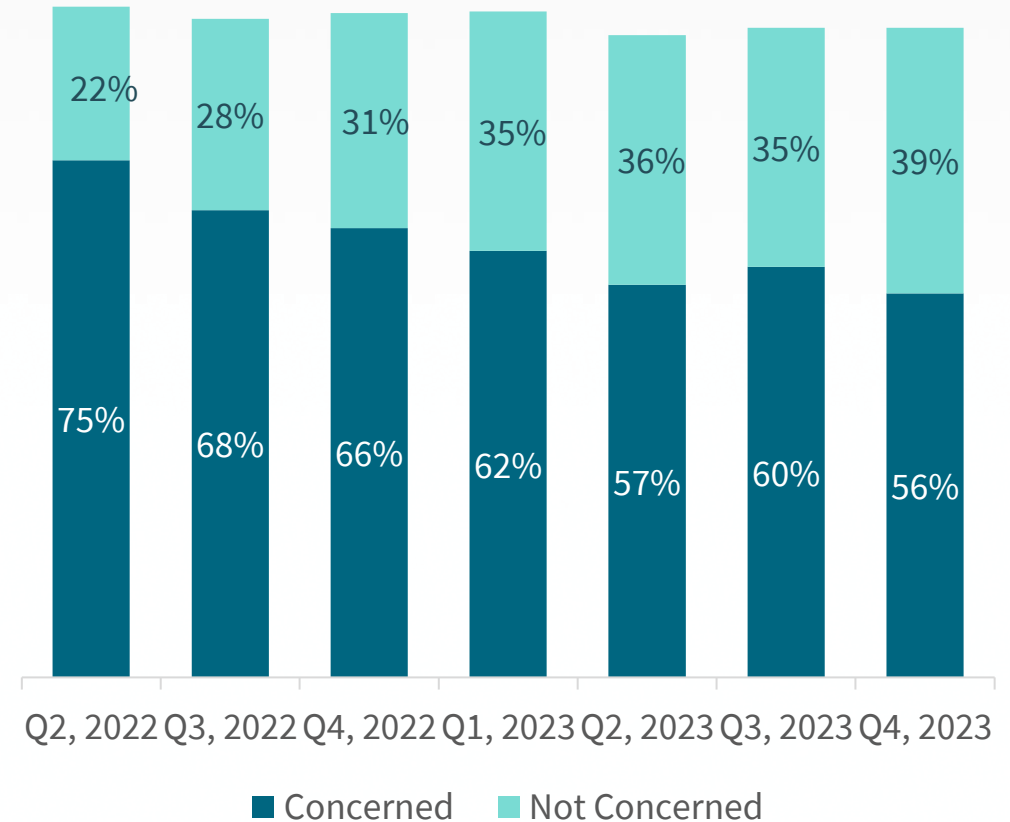
Comfort level socializing in public places*



83% are 'Very / Somewhat comfortable' from **November** Senior Healthy Living Survey

* Based on a 5-point rating scale

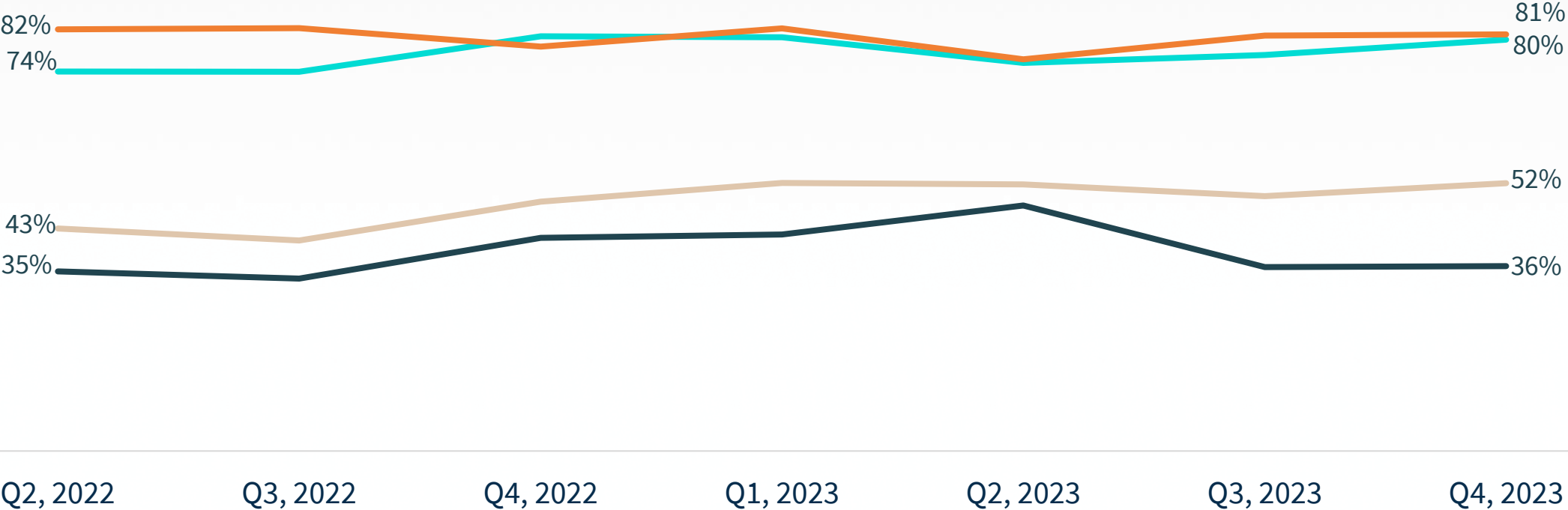
Level of concern for a Coronavirus outbreak**



** 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')*



- 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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