

HEALTHY LIFESTYLES – GERMANY – 2024

Germans' health is yet to recover amid multiple crises, calling for brands to continue to support consumers in living healthily (eg multifunctional immune boosters, affordable fitness with added benefits).



Katharina Kirsch, Analyst



Healthy Lifestyles – Germany – 2024

This report looks at the following areas:

- Germans' perceptions of general health and different areas of health
- Changes in overall mental wellbeing compared to a year ago
- Priorities for leading a healthy lifestyle in the next 12 months
- Drivers to leading a healthy lifestyle
- Healthy lifestyle behaviours, such as the impact of mental health on exercise and the impact of the rising cost of living on leading a healthy lifestyle

Overview

There are signs that the percentage of German consumers who **perceive the general health for a person of their age as healthy** remained steady at **48%** between 2023 and 2024; compared to September 2021 (**55%**), this percentage even decreased by 7. Hence, **Germans' health is yet to recover** while they are **navigating through times of multiple crises**.

In the face of high inflation, affordability has emerged as an established concern for consumers, particularly influencing their health habits with even higher-income households being affected. As such, **53% of Germans** agree that the **rising cost of living** has made it **less affordable for them to lead a healthy lifestyle**.



Germans' health is yet to recover amid multiple crises, calling for brands to continue to support consumers in living healthily (eg multifunctional immune boosters, affordable fitness with added benefits).

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46% of Germans agree that **financial worries** leave them with **less energy to care about their health**. This depicts a risk as it can lead to a **deterioration of general health**.

As **consumers have less energy to care about their health** due to financial worries, health brands can **capitalise on this and help them justify spending** with products that combine multiple benefits to their health in one product. For example, **supplement brands** can draw inspiration from tetesept, which showcases **multifunctional advantages through a holistic product**.

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Report Content

EXECUTIVE SUMMARY

Market context

- Inflation is still affecting Germans' lives
- Mental health continues to be a key issue

Opportunities

- Continue to support Germans in living healthy with affordable options
- Appeal to Germans by offering versatile health-boosting solutions
- Capitalise on the mind-body connection
- Fitness brands: transform into holistic health places to help the young to exercise

MARKET DRIVERS

The German economy

- 2024 is expected to be more challenging than initially predicted
 - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 2: financial confidence index, 2022-24
- The impact of the economy on healthy lifestyles

Obesity

- The extent of Germany's obesity epidemic
 - Graph 3: trends in body mass index (BMI), 1999-2021
- Obesity levels continue to increase

Physical activity

- Physical activity is multifarious
- Living in times of multiple crises increases the risk of physical inactivity
- Exercise frequency declines with age
 - Graph 4: exercise frequency, by age, NET, 2023

Nutrition

- Changes in Nutri-Score portray a risk of credibility
- Plant-based diets lead Germans to healthier food choices

Mental health

- Mental illnesses are a crucial economic factor
- Mismatch between what Germans think they should do and actually do for their mental health
 - Graph 5: ideal vs actual frequency of doing mindfulness exercises, NET, 2023

WHAT CONSUMERS WANT AND WHY

Perceptions of general and different areas of health

- Germans' health is still on the path to recovery
- Help Germans to help themselves
- 18-34s' health perception has improved
 - Graph 6: perception of general health for a person of one's own age, by age, 2024**
 - Graph 7: perception of general health for person of one's own age, by age, 2023*
- Support financially struggling consumers to live a healthy lifestyle on a budget
 - Graph 8: perception of health, by financial situation, NET, 2024
- Health perceptions vary between the different areas of health
 - Graph 9: perception of different areas of health, NET, 2024
- Cater to Germans with multifunctional immune health boosters
- tetesept helps consumers to support their immune system with multifunctional immune treatment
- Provide affordable fitness to reach financially struggling consumers
- Promote a holistic approach to weight management
 - Graph 10: negative perceptions of selected areas of health, by perception of own weight, 2024
- Hotel Mürz provides a holistic combination of wellness, health treatments and relaxation

Change in overall mental wellbeing

- Germans' mental wellbeing has improved
- Financially struggling consumers are more likely to report that their mental wellbeing has worsened
 - Graph 11: change of overall mental wellbeing, by financial situation, 2024
- Help younger consumers to make mindfulness practices part of their daily routine
 - Graph 12: change in overall mental wellbeing compared to a year ago, by age, 2024
- Balloon targets consumers with an insurance-sponsored mindfulness concept
- Rituals taps into the mental wellbeing sector

Priorities to leading a healthy lifestyle

- Nutrition and physical fitness are top of mind for a healthy lifestyle
 - Graph 13: priorities to lead a healthy lifestyle in the next 12 months, 2024
- Leverage the potential of technology to help consumers cook healthily
- Tourism: make sleep health an important part of the stay

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- Promote sleep health with vegan-friendly sleep aids
- Retail: astonish Germans with the opportunity to socialise in-store
- Cater to 16-24s with digital detox
- Reach men with alcohol-free drinks that promote relaxation

Drivers to leading a healthy lifestyle

- Preventing future health issues is top of consumers' minds
 - Graph 14: aspects that would most encourage a healthy lifestyle, 2024
- Resonate with younger consumers by raising awareness of illness prevention
- AOK's #VwieVorsorge campaign: because cancer knows no age
- Reach over-65s with personalised guidance for well-ageing
- Cater to Gen Z with appearance-focused benefits

Healthy lifestyle behaviours

- Half of Germans are feeling the effects of high inflation on their healthy habits
 - Graph 15: behaviours towards leading a healthy lifestyle, 2024
- Germans need to make sacrifices to their healthy habits
- Keep support initiatives for affordable healthy nutrition going
- Fitness brands: become holistic health places to help the young
- Gain inspiration from fitness brands tapping into mental health in different countries
- Health and fitness clubs: use AI to create personalised workout programs
- Self-test providers: appeal to parents by promoting the time-saving aspect of self-tests

APPENDIX

Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

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