

# 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).



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# 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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