

MANAGING A HEALTHY LIFESTYLE – GERMANY – 2019

There is an urgent need for concerted efforts by the government, businesses and brands to change people's perceptions about what constitutes being healthy.



Heidi Lanschützer, Deputy
Research Director,
Germany



Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Improving the nation's health is a challenging yet crucial task
- Germany is faced with an obesity epidemic
 - Graph 1: Trends in body mass index (BMI), 1999-2017
- Unhealthy lifestyles put immense strain on the public purse
- Unhealthy lifestyles put immense strain on the public purse
- Alcohol consumption in Germany is one of the highest in the EU
- Alcohol consumption in Germany is one of the highest in the EU
- Mental health is receiving more attention

Mintel predicts

- Government action will become more forceful
- Technology will change healthcare but human expertise will be more important than ever
- The digitalisation of life will fuel social isolation
- Consumers need support to reach their health goals

What consumers want, and why

- Consumers and health: A mixture of healthy and unhealthy habits
 - Graph 2: efforts people put into staying healthy, October 2019
- Consumers and exercise: 68% of Germans say they exercise regularly
- Consumers and exercise: 68% of Germans say they exercise regularly
- Consumers and healthy habits: Most Germans struggle to eat enough fruit and vegetables
 - Graph 3: frequency of health-related habits (net), October 2019
- Consumers and healthy habits: Healthy finances are linked to healthy habits
 - Graph 4: frequency of selected health-related habits (net), October 2019
- Consumers and relaxation: Most people don't think they get enough sleep every day
- Consumers and relaxation: Most people don't think they get enough sleep every day
- Consumers and health advice: Digital guidance is overtaking traditional channels
 - Graph 5: sources people turn to when looking for health-related advice, October 2019
- Consumers and mental wellbeing: Friends and family are the secret to good mental health
 - Graph 6: habits considered most important to support long-term mental/emotional wellbeing, October 2019
- Consumers and mental wellbeing: Friends and family are the secret to good mental health

Opportunities

- Fitness offerings targeted at the senior consumer
- Products and services that help Germans sleep better and relax more
- Making health advice/services more accessible and safe
- Reframing the benefits of exercise
- Gut health innovation
- Quick download resources

MARKET DRIVERS

- Over half of German adults are overweight or obese, and rates continue to grow
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- Over half of German adults are overweight or obese, and rates continue to grow
 - Graph 7: Trends in body mass index (BMI), 1999-2017
- Older people and men more likely to be overweight/obese
- Older people and men more likely to be overweight/obese
- Weight issues start at a young age
- Obesity is costly
- Obesity is costly
- Only a minority of consumers are prepared to change habits to be healthier
- Only a minority of consumers are prepared to change habits to be healthier
- Only a minority of consumers are prepared to change habits to be healthier
 - Graph 8: healthy eating habits, by age, Q4 2018
- Government sets salt, fat and sugar reduction targets for processed food in a bid to shrink the nation's waistline
- Germany's food minister backs introduction of Nutri-Score labelling system...
- Germany's food minister backs introduction of Nutri-Score labelling system...
- ...despite widespread criticism from industry stakeholders
- 1 in 3 Germans never exercise
- Health ministry's IN FORM campaign aims to improve dietary and exercise habits of Germans by 2020
- 'Sport pro Gesundheit' initiative looks to foster long-term exercise motivation
- Germany's alcohol consumption is one of the highest in Europe
 - Graph 9: per-capita consumption of pure alcohol among adults (15+), in litres, 1997-2006
- Over 1 in 4 completely abstain from alcohol
- Over 1 in 4 completely abstain from alcohol
- Mental health is coming into focus
- Mental health awareness and acceptance grow
- Our digital world fosters loneliness
- Social media and technology have a huge impact on people's healthy habits

- Mental health apps emerge in Germany

WHAT CONSUMERS WANT, AND WHY

What efforts do Germans put into staying healthy?

- Most Germans feel they have a balanced approach to health
- Most Germans feel they have a balanced approach to health
- There are still opportunities for health-based new product development
- Young people are particularly strict with their healthy habits...
- Young people are particularly strict with their healthy habits...
- ...perhaps a little too strict
- Socioeconomic factors determine extent of healthy efforts
- Socioeconomic factors determine extent of healthy efforts
- Health needs to be a luxury that is available to everyone
 - Graph 10: selected health-related behaviours, by financial situation, October 2019

Health and exercise

- How often do people take time out to look after their health?
 - Graph 11: frequency of health-related habits (net), October 2019
- 51% of Germans say they exercise at least once a week
 - Graph 12: share of people who exercise, by age group, October 2019
- But the older people are, the less likely they are to exercise
- But the older people are, the less likely they are to exercise
- The fitness market needs to become more inclusive
- Nike's Unlimited Youth campaign

Healthy eating and drinking

- Majority of people in Germany are not getting the recommended 5-a-day of fruit and veg
- Majority of people are not getting the recommended 5-a-day of fruit and veg
- People who are struggling financially are less likely to be eating 5 portions of fruit or vegetables a day
- People who are struggling financially are less likely to be eating 5 portions of fruit or vegetables a day
- Food brands and retailers need to help consumers reach their '5-a-day' more easily
- Food brands and retailers need to help consumers reach their '5-a-day' more easily
- Calorie counting is not necessarily seen as part of healthy eating
- Apps can facilitate calorie counting...
- Apps can facilitate calorie counting...
- ...but people first and foremost must understand what calories mean in practical terms
- Mintel Trend: Help Me Help Myself
- Major UK foodservice brands jump on board of PHE's One You campaign

- Evidence of alcohol moderation opens a whole new avenue for beverage innovation
- Alcohol moderation encourages innovation in the spirits category...
- ...and gives rise to a new league of soft drinks

Sleeping habits and relaxation

- 2 in 5 people don't get enough sleep on a regular basis
- IKEA puts the spotlight on sleep
- IKEA puts the spotlight on sleep
- Only a third of people spend time relaxing on a daily basis
- Mintel Trend: Slow It All Down
- Relaxation opportunity goes far beyond tea and mindfulness apps

Sources people turn to for health-related advice

- Digital advice trumps traditional specialists
 - Graph 13: sources people turn to when looking for health-related advice, October 2019
- Over a quarter turn to health websites for dietary advice
 - Graph 14: sources people turn to when looking for health-related advice, October 2019
- Online and other sources win over traditional specialists
- Mintel Trend: Return to the Experts
- Parental involvement is crucial for getting health advice through to the young
- Sizeable minorities don't know where to look for health-related advice

Habits to support mental/emotional wellbeing

- Habits to support mental/emotional wellbeing
 - Graph 15: habits considered most important to support long-term mental/emotional wellbeing, October 2019
- Over half consider time with friends/family most important for mental wellbeing
- Over half consider time with friends/family most important for mental wellbeing
- Majority of Germans see the benefits of exercise on mental health
- 2 in 5 Germans recognise the link between a healthy diet and mental wellbeing
- Opportunities are manifold for gut health innovation
- The gut-brain axis could make microbiome health even more important
- Gut health tests suggest personalized solutions in the future
- Young Germans recognise the detrimental effect of social media on mental health
- Young Germans recognise the detrimental effect of social media on mental health

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology

- Abbreviations

- Consumer research methodology

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US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
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