

SLEEP HEALTH – US – 2024

Consumers know sleep impacts wellbeing but struggle making habits that last. Brands can leverage interest in functional ingredients to boost engagement.



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- Health & Wellness



Sleep Health – US – 2024

This report looks at the following areas:

- Sleep issues experienced and satisfaction with current sleep
- Motivations for enhancing sleep
- Factors causing lack of sleep
- Usage and frequency of OTC sleep products
- Associations with common sleep aids
- Barriers to implementing better sleep habits
- Attitudes and behaviors toward sleep and sleep products



Consumers know sleep impacts wellbeing but struggle making habits that last. Brands can leverage interest in functional ingredients to boost engagement.

Overview

Consumers are more attuned than ever to the relationship between sleep and overall wellbeing, yet they find it challenging to adopt lasting habits. Making better sleep seem more attainable, customizable, and engaging can help routines stick.

In the year of the "sleepy girl mocktail," there's growing interest and awareness among consumers regarding new sleep-enhancing ingredients like magnesium, along with natural food and beverage options that aid sleep. Effectively implementing these elements and educating consumers about them will be essential for driving market growth, particularly as cost-saving measures and increased use of private labels become more prevalent.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- What you need to know
- What consumers want and why
- Market size & forecast
- Market predictions
- Opportunities

MARKET DYNAMICS

Market context

Market drivers

- Every brand is a health brand
- Sleep trackers can be a nightmare as much as they are a dream
- Self-care routines are becoming increasingly important
- The population is getting older
- Sleepless nights stemming from world events and mental wellbeing

Market size and forecast

- Retail sales and forecast of OTC sleep health products

Market segmentation

- Over-the-counter sleep aids continue to lead the category over nighttime pain relief products

Market share/brand share

- Sales of OTC Sleep aid products, by company

CONSUMER INSIGHTS

Consumer fast facts

Sleep self-assessment and satisfaction

- Overall, sleep problems remain steady
 - Graph 1: sleep self-assessment, 2021-24
- Limited satisfaction: just under half are content with their sleep quality

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 - Graph 5: satisfaction with sleep quality, by parental status and gender, 2024
 - Graph 6: sleep self-assessment, by parental status and gender, 2024
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 - Graph 10: factors leading to less sleep, by parental status and gender, 2024
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 - Graph 11: prolonged technology use as a factor causing lack of sleep, by generation and gender, 2023-24
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- Private label brands can fulfill need for affordable sleep aids
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Motivations for improving sleep

- Immediate health benefits such as increased energy are the strongest motivators for better sleep
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 - Graph 15: motivations for improving sleep, by generation, 2024
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 - Graph 16: motivations for improving sleep, by parental status and gender, 2024
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- Rising use of over-the-counter sleep aids, especially multifunctional pain and flu medications
 - Graph 17: utilization of sleep aids, 2021-24

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- OTC sleep aids are most often used as pick-me-ups
 - Graph 18: frequency of sleep aid usage by OTC type used, 2024
- Millennials are the key users of OTC sleep aids
 - Graph 19: utilization of sleep aids, by generation, 2024
- Boost sleep aid adoption among Baby Boomers by emphasizing their wellbeing goals
 - Graph 20: daily utilization of sleep aids, by generation, 2024
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 - Graph 21: utilization of sleep aids, by parental status and gender, 2023-24

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 - Graph 22: associations with sleep aid types, 2024
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 - Graph 23: no associations with sleep aid types, 2024
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 - Graph 24: efficacy of magnesium and melatonin based sleep aids, by generation, 2024
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- Ways companies are offering personalization
- Combat nighttime procrastination by boosting daytime productivity
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- Rested kids can mean rested parents

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 - Graph 30: use of technology to track sleep, by generation and gender, 2024
- Technology can bolster CPG sleep products
- Simplify sleep aids for parents and children through multifunctionality

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- Samsung's Galaxy watch receives FDA approval for sleep apnea detection feature
- Catching Z's and Pokémon: Nintendo enters the sleep category
- MyFitnessPal Announces "Sleep Factors" to help educate on the impact of sugar, water, and exercise on sleep quality

Marketing and advertising

- Oura Ring connects better sleep to feeling good, reducing stress, and increased physical activity
- Helping ease menopausal sleep issues
- Travel industry emphasizes the rejuvenating power of sleep

Opportunities

- Help build habits that last
- Beyond pills: sleepy girl mocktail spotlights the potential of functional food and drinks

APPENDIX

- Market definition
- Fan chart table
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast methodology
- Forecast fan chart methodology

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