

## OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Despite positive growth of OTC sleep aids, the category is still up against several challenges. Consumers are concerned about side effects, and usage of other ways to help them fall asleep is more prevalent than OTC sleep aids. The growth of fitness devices to track sleep patterns could also negatively impact the market of OTC sleep aids.”  
– Emily Krol, Health and Wellness Analyst

### This report looks at the following areas:

- Product recalls and new launches minimize competition from OTC night-time pain medications
- Growth of fitness tracking devices could impede market of sleep aids
- Is there high consumer interest in natural OTC sleep aids?

Sleep continues to hold weight as an elusive consumer goal – more than half of people have trouble sleeping – resulting in the launch of numerous products in a number of categories designed to help consumers get the sleep they need and keep them energized throughout the day. The shortage of well-recognized brands combined with increased concern about product safety has traditionally been a challenge for the OTC (over-the-counter) sleep aids market.

The launch of ZzzQuil in 2012 helped to double sales of OTC sleep aids from 2011-13. While consumers still have concerns about taking OTC sleep aids, sales in this category show promising growth in the near future. However, a variety of alternatives, such as herbal/natural remedies, private label, and home remedies will present a challenge to future growth in the market.

This report examines consumer use of and attitudes toward traditional and natural sleep aids. Consumers will be segmented based on sleep deprivation issues, as these tend to differ by age and gender, providing deeper context into sleep aid selection.

This report builds on the analysis presented in Mintel's Sleep Aids – US, January 2012, as well as the November 2010, 2009 and 2006 reports of the same title. Further analysis is based on Mintel's Sleep Disorders – US, November 2008.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto:oxygen@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

- What you need to know
- Definition
- Data sources
- Sales data
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

### Executive Summary

Overview

The market

Figure 1: Total US sales and fan chart forecast of OTC sleep aids, at current prices, 2008-18

Market factors impacting sales of OTC sleep aids

Segment performance

Figure 2: Share of sleep aids, by segment, at current prices, 2011 and 2013

Key players

Figure 3: MULO sales of OTC sleep aids, by leading companies, rolling 52 weeks 2012 and 2013

Competitive context

Figure 4: Usage of and interest in products to help sleep, November 2013

The consumer

Trouble sleeping is prevalent

Figure 5: Trouble sleeping, by gender and age, November 2013

Reasons for struggling with sleep

Figure 6: Reasons for difficulty sleeping, November 2013

Concerns about usage

Figure 7: Concerns about OTC sleep aids, November 2013

What we think

### Issues and Insights

Product recalls and new launches minimize competition from OTC night-time pain medications

The issues

The implications

Growth of fitness tracking devices could impede market of sleep aids

The issues

The implications

High consumer interest in natural OTC sleep aids

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The issues

The implications

## Trend Application

Trend: Slow It All Down

Trend: Factory Fear

Mintel Futures: Old Gold

## Market Size and Forecast

Key points

Launch of ZzzQuil helped to fuel growth of OTC sleep aids

Sales expected to continue upward

Sales and forecast of OTC sleep aids

Figure 8: Total US sales and forecast of OTC sleep aids, at current prices, 2008-18

Figure 9: Total US sales and forecast of OTC sleep aids, at inflation-adjusted prices, 2008-18

Fan chart forecast

Figure 10: Total US sales and fan chart forecast of OTC sleep aids, at current prices, 2008-18

## Market Drivers

Key points

More than half of people have trouble sleeping

Women are a prime target for OTC sleep aids

Figure 11: Trouble sleeping, by gender and age, November 2013

Figure 12: Female and male population, 2014-19

Growth of aging population

Figure 13: Population aged 18 or older, by age, 2014-19, Trouble sleeping, by age, November 2013

Increasing Hispanic population bodes well for category

Figure 14: Trouble sleeping, by race/Hispanic origin, November 2013

Effects of economy on sleep

Figure 15: Trouble sleeping, by household income, November 2013

Households with children

Figure 16: US households, by presence of own children, 2003-13

## Competitive Context

Key points

High interest in alternative sleep aids

Figure 17: Usage of and interest in products to help sleep, November 2013

Food, drinks, and other "home" remedies

Other OTC medications

Pain medications with sleep aid

Figure 18: MULO sales of select brands of internal analgesics with sleep aid components, rolling 52 weeks 2012 and 2013

OTC cold, flu, allergy medications with sleep aid

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Prescription sleep aids

Figure 19: Prescription sleep remedies, by sleep disorders, May 2012-June 2013

## Technology

## Segment Performance

### Key points

Traditional sleep aids overtake other segments

Sales of OTC sleep aids, by segment

Figure 20: Total US retail sales of sleep aids, by segment, at current prices, 2011 and 2013

Sales of traditional sleep aids expected to double by 2018

Figure 21: Total US sales and forecast of traditional OTC sleep aids, at current prices, 2008-18

Private label OTC sleep aids maintain steady growth

Figure 22: Total US sales and forecast of private label OTC sleep aids, at current prices, 2008-18

Consumer interest in natural products will drive segment growth

Figure 23: Total US sales and forecast of natural/homeopathic sleep aids, at current prices, 2008-18

## Retail Channels

### Key points

Most OTC sleep aid sales take place at "other retail channels"

More prominent positioning in store helped to boost sales

Opportunity to increase sales at supermarkets

Sales of OTC sleep aids, by channel

Figure 24: US sales of sleep aids, at current prices, by retail channel, 2008-13

Younger OTC sleep aid users purchase from a range of retailers

Figure 25: Places OTC sleep aids purchased, by gender and age, November 2013

Figure 26: Walgreens ZzzQuil in store Display, 2013

## Leading Companies

### Key points

Launch of ZzzQuil lifts sales in category

Figure 27: MULO sales of OTC sleep aids, by leading companies, rolling 52 weeks 2012 and 2013

Brands of OTC sleep aids used

Figure 28: Brands of OTC sleep aids used, by gender and age, November 2013

## Brand Share – Traditional OTC Sleep Aids

### Key points

Sales of traditional sleep aids nearly double

Other brands reap benefits of ZzzQuil success

Manufacturer sales of traditional OTC sleep aids

Figure 29: MULO sales of traditional OTC sleep aids, by leading companies, rolling 52 weeks 2012 and 2013

## Brand Share—Natural and Homeopathic OTC Sleep Aids

### Key points

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sales of natural brands slow

Liquid formats prove successful

Brand leaders slow sales

Other shake ups among natural/homeopathic brands

Manufacturer sales of natural and homeopathic OTC sleep aids

Figure 30: MULO sales of natural and homeopathic OTC sleep aids, by leading companies, rolling 52 weeks 2012 and 2013

### Innovations and Innovators

ZzzQuil boosts innovation in sleep aids category

Figure 31: ZzzQuil product shot

Figure 32: Share of branded/private label launches of OTC sleep aids, 2008-13

Innovation abounds in natural sleep aids

Private label seeks to replicate ZzzQuil success

Alternative formats for sleep aids

### Marketing Strategies

Overview of the brand landscape

Launching with a bang

Figure 33: ZzzQuil, television ad, 2013

Co-branding with other products

Providing consumers with tools

Figure 34: Johnson & Johnson My-coach Sleep website screenshot, 2013

Figure 35: MidNite app, 2013

Awake refreshed

Figure 36: DreamWater, television ad, 2013

### Reasons for Sleep Difficulty

Key points

Help consumers mentally "switch off"

Figure 37: Impact of the internet on sleep, April 2007-June 2013

Figure 38: Reasons for difficulty sleeping, November 2013

Female-specific issues affect sleep

Figure 39: Reasons for difficulty sleeping, by gender and age, November 2013

Less than ideal sleep environment affects younger sleep strugglers

Figure 40: Reasons for difficulty sleeping, by gender and age, November 2013

Worrying about finances affects lower income households

Figure 41: Reasons for difficulty sleeping, by household income, November 2013

### Usage of and Interest in Products to Help Sleep

Key points

Increase usage among those using competitive products

Women interested in alternative ways to treat sleep issues

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 42: Sleep assistance products used and would use again, by gender and age, November 2013

Figure 43: Sleep assistance products not used but interested in trying, by gender and age, November 2013

More severe sleep issues require a wide range of products

Opportunity to increase usage with parents

Figure 44: Products used to help sleep, by any reasons for difficulty sleeping, November 2013

### Attitudes Toward Purchasing and Using OTC Sleep Aids

Key points

Issues shopping the category

Figure 45: Target in store display, 2013

Figure 46: Attitudes toward purchasing OTC sleep aids, by gender and age, November 2013

Ingredient labels important in selection process

Interest in natural/herbal

Figure 47: Attitudes toward OTC sleep aids, by gender and age, November 2013

Alleviating confusion when shopping

Figure 48: Brands of OTC sleep aids used, by attitudes toward purchasing OTC sleep aids, November 2013

### Race and Hispanic Origin

Key points

Reasons for struggling with sleep

Figure 49: Any reasons for difficulty sleeping, by race/Hispanic origin, November 2013

Usage of and interest in products to help with sleep

Figure 50: Usage of and interest in products to help sleep – Have used and would use again, by race/Hispanic origin, November 2013

Attitudes toward purchasing and using OTC sleep aids

Figure 51: Attitudes toward purchasing OTC sleep aids, by race/Hispanic origin, November 2013

Figure 52: Attitudes toward OTC sleep aids, by race/Hispanic origin, November 2013

### Appendix – Other Useful Consumer Tables

Product launches

Figure 53: Share of healthcare product introductions with a stress/sleep claim, 2008-13

Difficulty sleeping

Figure 54: Trouble sleeping, by gender, November 2013

Figure 55: Trouble sleeping, by age, November 2013

Figure 56: Trouble sleeping, by presence of children, November 2013

Reasons for sleep difficulty

Figure 57: Any reasons for difficulty sleeping, by gender, November 2013

Figure 58: Any reasons for difficulty sleeping, by age, November 2013

Usage of and interest in products to help sleep

Figure 59: Products used to help sleep, by presence of children in household, November 2013

Figure 60: Products not used but interested in trying to help sleep, by household income, November 2013

Figure 61: Products used to help sleep, by any reasons for difficulty sleeping, November 2013

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## OTC Sleep Aids - US - February 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 62: Products used to help sleep, by any reasons for difficulty sleeping, November 2013 (continued)

Figure 63: Products used to help sleep, by any reasons for difficulty sleeping, November 2013 (continued)

### Brands used

Figure 64: Brands of OTC sleep aids used, by race/Hispanic origin, November 2013

Figure 65: Brands of OTC headache and pain relievers used, April 2008-June 2013

### Purchase location

Figure 66: Total US retail sales of sleep aids, by channel, at current prices, 2011-13

Figure 67: Places OTC sleep aids purchased, by race/Hispanic origin, November 2013

### Attitudes toward purchasing and using OTC sleep aids

Figure 68: Brands of OTC sleep aids used, by attitudes toward OTC sleep aids, November 2013

Figure 69: Brands of OTC sleep aids used, by attitudes toward OTC sleep aids, November 2013 (continued)

Figure 70: Brands of OTC sleep aids used, by attitudes toward purchasing OTC sleep aids, November 2013

Figure 71: Brands of OTC sleep aids used, by attitudes toward purchasing OTC sleep aids, November 2013 (continued)

### Attitudes toward ACA

Figure 72: Consumer attitudes toward how PPACA will affect sleep aid usage, by household income, November 2013

## Appendix – Market Drivers

### Patient Protection and Affordable Care Act

Figure 73: Consumer attitudes toward how PPACA will affect sleep aid usage, by usage of and interest in products to help sleep, November 2013

Figure 74: Consumer attitudes toward how PPACA will affect sleep aid usage, by usage of and interest in products to help sleep, November 2013 (continued)

### Obesity

Figure 75: American adults by weight category as determined by body mass index (BMI), 2008-Oct. 28, 2013

### Consumer confidence

Figure 76: University of Michigan's index of consumer sentiment (ICS), 2007-13

### Unemployment

Figure 77: US unemployment rate, by month, 2002-13

Figure 78: US unemployment and underemployment rates, 2007-13

Figure 79: Number of employed civilians in US, 2007-13

Figure 80: Median household income, in inflation-adjusted dollars, 2002-12

### Racial, ethnic population growth

Figure 81: US population by race and Hispanic origin, 2009, 2014, and 2019

Figure 82: Households with children, by race and Hispanic origin of householder, 2013

Figure 83: Median household income, by race and Hispanic origin of householder, 2012

### Shifting US demographics

Figure 84: US population, by age, 2009-19

Figure 85: Annual births and fertility rate, 2002-12

## Appendix – Trade Associations

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)