

Sleep Health - US - 2021

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and OTC sleep aid products.
- As perceptions of dependency persist around traditional sleep aids, OTC brands look to emulate sleep supplements' successful strategy centered around natural ingredients.
- Opportunity lies in cross-category partnerships and multifunctional product innovation.
- The combination of sleep technology and personalization is primed to offer premium sleep solutions.

The challenges of the COVID-19 pandemic upended consumers' sleep habits across generations, resulting in a 25.5% jump in OTC sleep aid sales from 2019-20. As the rapid rise of sleep supplements continues to disrupt the market and consumers remain wary of sleep aid dependency, traditional OTC brands have the opportunity to retain customers and capture new audiences by way of natural ingredients, mental health claims, and cross-category innovation.



"While many consumers recognize sleep's contribution to overall health, they often fail to fully understand the direct relationship between quality of sleep and other areas of holistic health, such as mental wellbeing. OTC sleep aid brands must extend their products and messaging beyond basic "fall asleep" and "stay asleep" claims to educate consumers on the root of their issues, which often lie within other aspects

of their health."
Buy this report now
 Visit store.mintel.com
 with **Health & Wellness Analyst**

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **This Report focuses on OTC (over-the-counter) sleep aids that help the user to fall asleep. Included in this Report are:**
- **COVID-19: Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US sales and fan chart forecast of OTC sleep aid products, at current prices, 2016–26
- **VMS sleep products challenge key category players as PM pain relief sales wane**
Figure 2: Total US retail sales and forecast of OTC sleep aid products, by segment, at current prices, 2016–26
- **Impact of COVID-19 on OTC sleep aid products**
Figure 3: Short-, medium- and long-term impact of COVID-19 on OTC sleep aid products, 2021
- **Opportunities and challenges**
- **Incorporate herbal and natural ingredients to change safety perceptions**
Figure 4: Product use, 2019 and 2021
- **Multifunctional products represent multifaceted opportunity**
Figure 5: Preference for multifunctional sleep aids, by repertoire of product usage, 2021
- **Connect the dots between sleep and mental health**
Figure 6: Attitudes toward sleep, 2021
- **Consider both pros and cons of technology**
Figure 7: Factors causing sleeplessness – prolonged technology use, by age, 2019 and 2021
Figure 8: Trial of and interest in select alternative sleep aid methods, by factors regularly causing sleeplessness, 2021

THE MARKET – KEY TAKEAWAYS

- **Overall market poised for growth, with key player positions up for grabs**
- **Supplement brands could halt the growth of sleep aids and hasten the decline of PM pain products**
- **COVID-19 variants trigger economic uncertainty, increase in demand from older population**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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

- **Cannabis and CBD represent opportunity for innovation**

MARKET SIZE AND FORECAST

- **Historic and projected sales performance of OTC sleep aids**

Figure 9: Total US sales and fan chart forecast of OTC sleep aid products, at current prices, 2016-26

Figure 10: Total US sales and forecast of OTC sleep aid products, at current prices, 2016-26

MARKET BREAKDOWN

- **VMS products bolster sleep aid market as PM pain medication sales slow**

Figure 11: Sales of market, by segment, at current prices, 2016-26

MARKET FACTORS

- **Consumer confidence shows tentative signs of improvement**
Figure 12: Consumer Confidence Index, 2010-21
- **Aging population’s unique needs not to be ignored**
- **Cannabis gradually enters the market as CBD takes off**

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Market share is up for grabs due to product innovation**
- **Supplements see success thanks to natural ingredients**
- **Nighttime pain relievers require rebrand as food & drink products compete for sales**
- **Break the mold with cross-category collaboration**

MARKET SHARE

- **Supplements threaten OTC sleep aids; PM pain brands continue decline**

Figure 13: Multi-outlet sales of OTC sleep aid products, by leading companies, rolling 52 weeks 2020 and 2021

WHAT’S WORKING

- **Gentle and multifunctional sleep supplements dominate**

Figure 14: Multi-outlet sales of natural OTC sleep aid products, by select leading companies, rolling 52 weeks 2020 and 2021

Figure 15: Sleep supplements with elderberry

- **Kids’ sleep aids skyrocket amid pandemic**

Figure 16: Multi-outlet sales of children’s OTC sleep aid products, by select leading companies, rolling 52 weeks 2020 and 2021

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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

Figure 17: SmartyPants melatonin-free sleep aid for kids

WHAT'S STRUGGLING

• **Already struggling PM pain brands weather publicity issues**

Figure 18: Multi-outlet sales of OTC internal analgesics with sleep aids, by leading companies, rolling 52 weeks 2020 and 2021

• **Functional food and drink products threaten traditional sleep aids**

Figure 19: Food and beverage products with Stress & Sleep claims, 2016-21

Figure 20: Functional food and beverage products with sleep claims

MARKET OPPORTUNITIES

• **Build loyalty through personalized solutions and guidance**

Figure 21: Instagram post, Proper

Figure 22: Instagram story, Base partner and influencer Brittani Lancaster

• **Expand sales footprint through beauty retailers**

Figure 23: Nature Made sleep aid with beauty claim

Figure 24: Instagram post, The Good Patch

• **Gain brand exposure through cross-category partnerships**

Figure 25: Instagram post, Natrol

THE CONSUMER – KEY TAKEAWAYS

- Sleep patterns and issues vary across demographics
- Consumer lifestyles influence types of products used
- Pandemic-era sleep factors: fixed or fickle?
- Room for innovation in response to COVID-19 challenges
- Traditional and alternative sleep aids go hand in hand
- Align with consumer values to encourage sleep aid use

SLEEP SELF-ASSESSMENT

• **Mature consumers' sleep disrupted during pandemic**

Figure 26: Sleep self-assessment, by age, 2019 and 2021

• **Consumers young and old require specific messaging**

Figure 27: Sleep self-assessment, by generation, 2021

• **Dozing off becomes main challenge for parents**

Figure 28: Sleep self-assessment, by parental status, 2020 and 2021

Figure 29: The Good Patch sleep patch

Figure 30: Instagram post, The Good Patch

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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

PRODUCT USAGE

- **Millennials seek dual-purpose sleep aids**
 Figure 31: Product use, 2021
 Figure 32: Repertoire of product use, by age, 2021
 Figure 33: Product use, by generation, 2021
 Figure 34: Instagram post, Sandland Sleep
- **Herbal sleep aids rise in popularity**
 Figure 35: Product use, 2019 and 2021
- **Consumers use all types of sleep aids to cope with current events**
 Figure 36: Product use, by factors causing sleeplessness, 2021

FACTORS CAUSING SLEEPLESSNESS

- **Disrupt cycle of sleeplessness with mental health claims**
 Figure 37: Factors causing sleeplessness, 2021
- **Tech-induced sleeplessness strikes across generations**
 Figure 38: Factors causing sleeplessness – prolonged technology use, by age, 2019 and 2021
- **Private label brands fulfill need for affordable sleep aids**
 Figure 39: Factors causing sleeplessness, by financial situation, 2021

CHANGES IN SLEEP QUALITY

- **Women bear the brunt of pandemic-related sleeplessness**
 Figure 40: Changes in sleep quality, by age and gender, 2021
- **Daytime routines have strong effect on sleep quality**
 Figure 41: Reasons for improved sleep, 2021
 Figure 42: Reasons for worsened sleep, 2021
- **Stress and sleep claims regain popularity**
 Figure 43: Changes in sleep quality, by factors causing sleeplessness, 2021
 Figure 44: Stress & sleep claims in sleep aid products, 2016–21

ALTERNATIVE APPROACHES TO SLEEP

- **Customers of alternative methods likely to be OTC sleep aid power users**
 Figure 45: Trial of select alternative sleep aid methods, by repertoire of product usage, 2021
 Figure 46: Sleep self-assessment, by repertoire of product usage, 2021
- **CBD sleep products entice all age groups**
 Figure 47: Trial of and interest in CBD products for sleep, by age, 2021
 Figure 48: Instagram post, Green Roads

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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

- **Busy consumers turn to sleep technology for optimized rest**
Figure 49: Trial of and interest in select alternative sleep aid methods, by factors regularly causing sleeplessness, 2021

ATTITUDES TOWARD SLEEP

- **Gen Z underestimates sleep as component of holistic health**
Figure 50: Select attitudes toward sleep, by age, 2021
- **Suburban and rural consumers express wariness toward sleep aids**
Figure 51: Concerns about sleep aid dependence – CHAID – Tree output, 2021
Figure 52: Interest in alternative sleep aid methods, by area, 2021
- **Ground multifunctional products in existing offerings**
Figure 53: Preference for multifunctional sleep aids, by repertoire of product usage, 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – COMPANIES AND BRANDS

Figure 54: Multi-outlet sales of OTC sleep aids, by leading companies and brands, rolling 52 weeks 2020 and 2021

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.