



1st Edition

Sleep Aids:

U.S. Market Analysis and Opportunities

Published May 2019

Base Year: 2018

Forecasts to 2023

Regional Coverage: United States

A comprehensive analysis of the market for sleep aids in the United States covering OTC sleep medicines, natural sleep aid products, and sleep aid devices, including consumer research on attitudes, usage, and perceptions. This study focuses on key trends, developments, business opportunities, new product activity, and consumer preferences in the rapidly changing and growing sleep aids market.

This Report Helps Subscribers to:

- Understand the size and growth of all facets of the sleep aids category
- Identify key opportunities for growth and/or partnerships/acquisitions
- Learn the factors that are important to consumers when buying sleep aids
- Discover the size of sales through hard-to-track alternate channels
- Analyze new, upcoming brands and technologies that will have an impact on this market
- Forecast the size of the category, taking all market adjacencies into account



Report Contents

Introduction

Executive Summary

- An overview of key findings

Product Categories

For each category listed in Table 1, the following analysis is provided:

- Category size and growth (2017 and 2018), including brand sales and growth
- Trends and market drivers
- Competitive landscape, key players, market shares
- Retail distribution including alternate channels
- Marketing activity including analysis of new products/technologies
- Forecast to 2023

Consumer Insights

This chapter consists of results from a consumer survey that assesses consumer attitudes, usage, perceptions, and shopping behavior pertinent to the sleep category and provides a thorough understanding of the following:

- Incidence and prevalence statistics on Americans with insomnia and sleep disturbance
- Demographics of sleep aid purchasers and users
- Retail channels, frequency of purchase/use
- Average price points paid for sleep aids
- Use of traditional OTC sleep aids, natural sleep aids, prescription sleep aids, and sleep devices relative to each other
- Views on consumer perceptions of efficacy and satisfaction with sleep aids

Table 1: Product Categories Profiled

Category	Product examples
Natural sleep aids	Melatonin, valerian, selenium, ashwagandha
OTC sleep aids	OTC medicated sleep aids, pain + sleep combination products
Sleep devices	Sleep gadgets, trackers, apps, monitors, masks





Scope

Sleep Aids: U.S. Market Analysis and Opportunities provides a detailed, independent appraisal of this fast-moving market. It explores consumer perceptions and pinpoint opportunities for marketers. Products included in the scope are medicated nonprescription sleep aids, natural or herbal sleep remedies, including those that contain melatonin, valerian, and the like, and technological devices that promote sleep, track sleep, or detect deficiencies in sleep. The sample of our consumer study consists of U.S. adults representative of the general population with region, gender, age, and income levels representative of U.S. Census data. The geographic scope is be the United States. The following categories are excluded:

- Prescription sleep aids
- Sleep apnea devices, such as CPAP machines
- Herbal teas
- Products that promote sleep that do not have a technology component, such as bedding, linens, non-device sleep masks, ear plugs, essential oils, diffusers, white noise sound machines, and the like

Key Benefits

This report enables subscribers to identify business opportunities in the dynamic sleep aids market and to understand consumers' attitudes, usage, and perceptions of sleep aids.

- Develop business strategies by understanding the trends and developments driving the sleep market
- Understand the competitive landscape and how to best position brands
- Identify trends in technology and new products that will impact the market
- Develop new sleep aid products suited to consumers' wants and needs
- Uncover opportunities for growth via acquisitions or partnerships
- A holistic view of the market, including all market segments and alternate channels of distribution



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60 years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research



We Know Who to Talk to. We Know How to Listen.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. This study includes extensive research with approximately 500 U.S. adult consumers to understand who, where, why, and how often consumers use sleep aids. In addition to consumer surveys, our business to business interviews engage experts across all pertinent fields and sectors including:

- Natural OTC marketers
- Traditional OTC marketers
- Sleep device companies
- Retailers
- Trade associations

Secondary Research



We Know Where to Look – Mining the Details.

Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence



We Know How to Verify.

Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

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