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# Sleep Trends: Consumers Focused on Catching Z's



**Evergi™ Conversations:**

Social listening data from Twitter and Instagram posts utilizing keywords related to wellness. Posts are tagged by product type and subtype, medical conditions, ingredients, need states, and associated keywords.

**Evergi™ Consumers:**

Survey fielded semi-annually online with 5,000 US consumers age 21+. The first wave was fielded December 2020. This is a general population survey, census balanced on age, gender, and geography.

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## Introduction

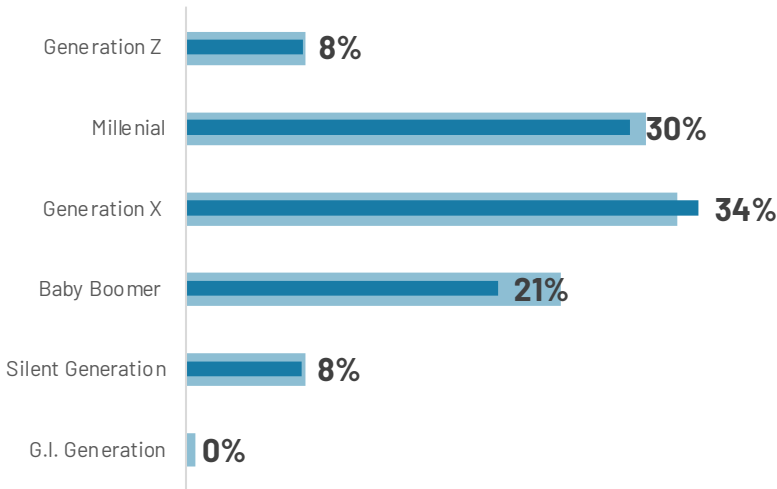
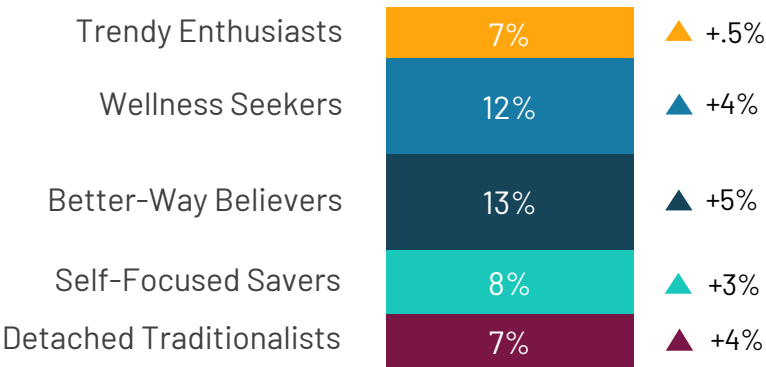
Sleep is a basic human need for survival — although basic, it doesn't come naturally to everyone. In fact, many consumers have trouble with sleep, whether that be falling asleep, or staying asleep. Currently, 46% of American consumers fall into the Sleep need state, within Brightfield Group's Evergi Wellness study — growing 17% since Q3 2021. Consumers in this need state, either struggle with sleep or actively make sleep their top priority. They are willing to use both functional ingredients and consumer products to get the sleep they need.



# Consumer focusing on sleep needs span our consumer wellness segments and age groups

- Consumers focusing on sleep needs span our consumer wellness segments and age groups — however strong increase have been seen among our segments more focused on tried-and-true wellness methods.
- Strong growth has been seen among our segments who are more focused on tried-and-true wellness methods (Wellness Seekers & Better-Way Believers).
- Gen X more likely to be focused on sleep; while Boomers are less likely to be included.

46% of consumers fall into the sleep need state



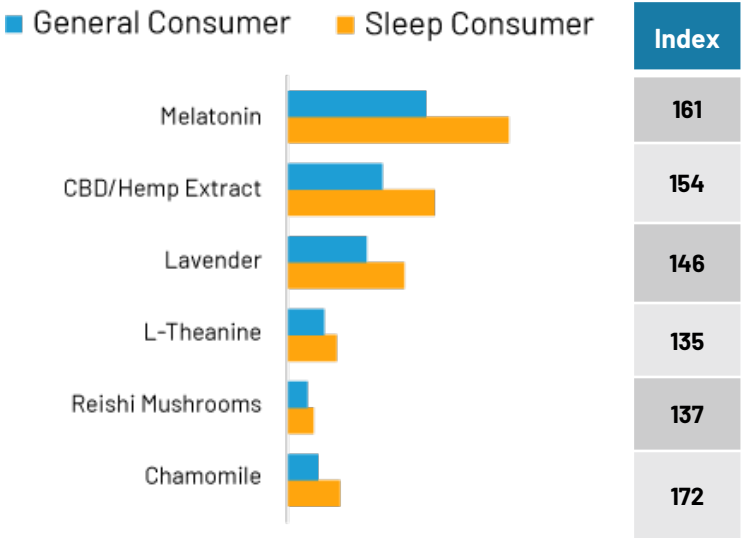
Those in the sleep need state are seeking functional ingredients to achieve their goals



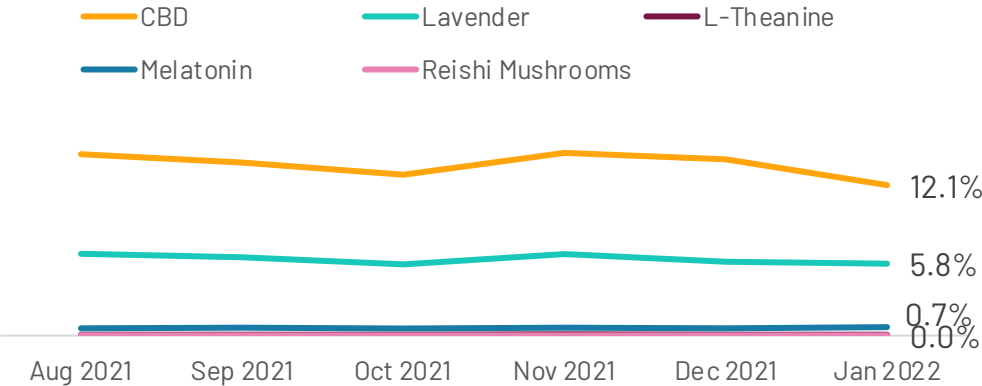
50%

looking for products to help with sleep

Ingredient Usage Past 3 Months

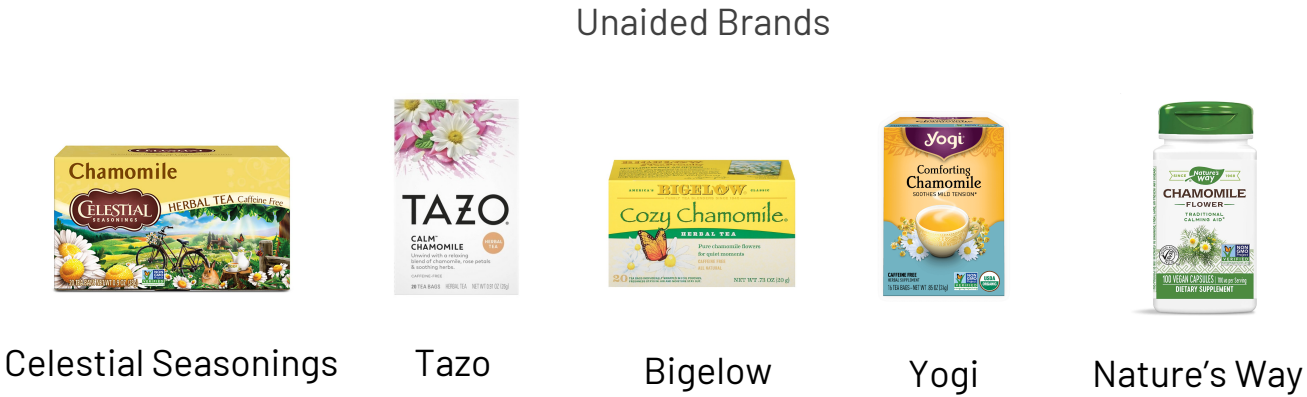
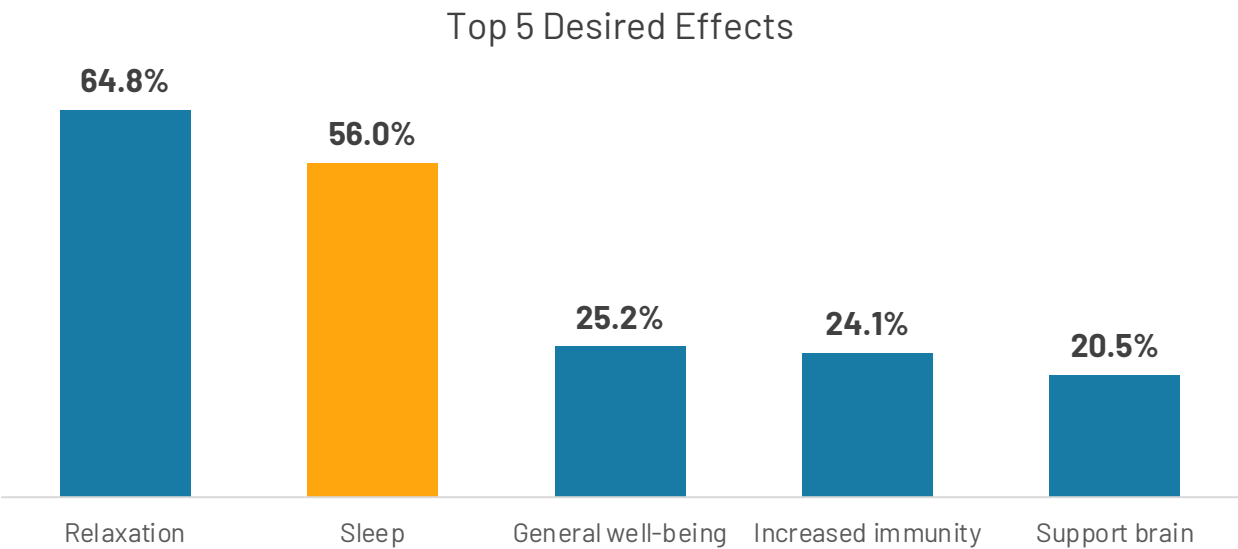


Social Listening: Trending Functional Ingredients



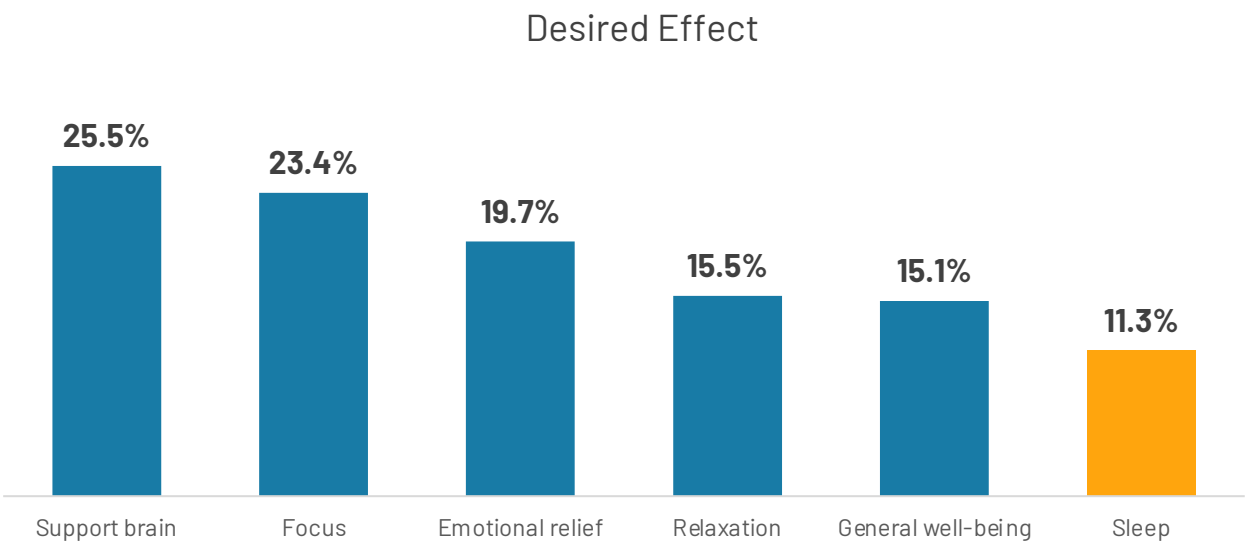
# Chamomile: The key for some to a good night's sleep

- Consumers are using chamomile tea to wind down and help improve sleep.
- Consumers are also using chamomile for immunity, brain support, and their general well-being.
- Tea is the most popular form however chamomile capsules are also somewhat popular amongst consumers.



# L-Theanine: Relaxing their way to more Z's

- **L-Theanine: Full of multi-functional benefits, including sleep**
  - L-Theanine an amino acid found in tea, that induces relaxation without drowsiness. L-theanine is used in supplements for its calming qualities and added to energy drinks to reduce the jittery symptoms that some experience high caffeine or taurine drinks.
  - L-Theanine has been said to benefit brain support, relaxation, and emotional relief — L-Theanine users echo these uses as they report their reasons for usage.
  - We are seeing 11% of people connect L-Theanine use to sleep and we are increasingly seeing it included as an additive in sleep products.



# Sleep Specific Products: A growing market

The majority of consumers (76%) believe that sleep is a top priority, and 42% prefer alternative medicines to traditional. Many turn to Melatonin for it's more natural sleep-inducing qualities. In fact, 18% of people in the Sleep need state are turning to Melatonin to help them get better, deeper sleep. Companies continue to take notice, and are innovating beyond the favorite gummy or pill form with new delivery methods, like powders and patches. These new forms will make getting sleep even easier for consumers and provide more choices to the growing sleep-deprived nation.



| Kindroot Snooze                                                                                                                                                          | Zolt Drink Mix                                                                                                                                   | Patch Brand                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| These lozenges provide a sweet alternative to melatonin gummies by providing a lozenge with sensory flavors and adaptogens that melts in your mouth and helps you sleep. | Formulated with adaptogens, antioxidants, and terpene botanicals, this drink mix allows consumers to hydrate before bed and improve their sleep. | Pure vitamin and nutrient blends in patch form rather than a gummy or pill. These high-quality nutrient blends discreetly stick onto your skin and offer sustained benefits for up to 24 hours. |

**Brightfield Group** is the leading research firm for emerging categories including CBD, cannabis, and wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. Since 2015, we have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea.

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