



THE FUTURE OF S L E E P

“

SLEEP IS THE ELIXIR
OF LIFE. IT IS THE
MOST POWERFUL,
READILY AVAILABLE
HEALTH-ENHANCING
TOOL WE HAVE.

”

MATTHEW WALKER
NEUROSCIENTIST AND AUTHOR OF WHY WE SLEEP

Yet most of us are
neglecting it...

THE BIG AWAKENING

The concept of sleep is undergoing a significant change. The long-held belief that success requires sacrificing sleep is increasingly being questioned, as more people recognise that optimal performance tomorrow depends on getting enough rest today.

As instinctive as sleep is, stressful jobs, on-screen entertainment and modern diets are making it harder to get enough rest. In response more brands are entering the market, offering products that promise to redefine nightly routines and renew vitality.

This awakening marks the start of a sleep revolution.

From personalised sleep tech to scientifically-backed aids, steering clear of the nightcap or switching out the naughty evening snack, we're amid a cultural shift of consumers reclaiming back their sleep, health and happiness.



“BETTER TOMORROW'S START TONIGHT. DRINKING ALCOHOL IS LIKE BORROWING HAPPINESS FROM TOMORROW. WHILE HAVING A GOOD SLEEP IS LIKE DEPOSITING INTO YOUR ACCOUNT FOR THE NEXT DAY.”

HUGH THOMAS

Founder, Cuddle Sleep Health

THE GLOBAL SLEEP ECONOMY
ESTIMATED TO GROW UP TO

\$108.21 billion
BY 2032

Source: Straits Research 2024



ON THE PULSE

Exploring the 'Roots' and 'Shoots' of sleep to uncover the future opportunities for brands.



ROOTS

Cultural shifts rooted in consumer needs that have driven the evolution of sleep.

SHOOTS

A collection of emerging consumer behaviors that are evolving the space for the future.

ROOTS

By looking back at the cultural and technological changes over the last five decades, we can trace the roots that paved the way for a sleep deprivation epidemic.

1970s

RESTLESS REVOLUTION



This decade witnessed the growth of 24-hour economies and the rise of late-night television eating into sleep time.

1980s

SLEEP SACRIFICE



Video games and the proliferation of personal computers extended waking hours at the cost of sleep.

1990s

WELCOME: INTERNET



The internet boom introduced the beginnings of a culture where access to others extended beyond the day.

2000s

HYPER HUSTLE



The rise of hustle culture saw the glorification of long working hours and minimal rest being a badge of honour.

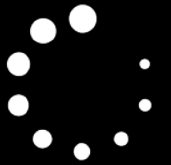
2010s

CHRONIC CONNECTIVITY



The normalisation of sleep deprivation was solidified by constant connectivity and seemingly endless screentime.

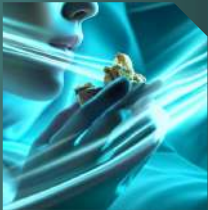
2020s



LOADING...

SHOOTS

These **emerging trends** are driving the evolution of sleep, unlocking new opportunities for brands to engage and excite consumers:



SLEEP-FRIENDLY SNACKING & BEVERAGES

Product innovation that taps into the link between diet and sleep quality is enabling consumers to turn guilty late-night cravings into sleep enhancing rituals that offer all the same taste and enjoyment.



NATURAL SUPPLEMENTS

A way to get more restorative sleep and improve health without depending on medication. Consumers want efficacy from clinically backed natural solutions that help them achieve their wellbeing goals.



FROM PASSIVE TO ACTIVE

With passive sleep trackers being labeled by some as anxiety inducing, more active intervention solutions are gaining traction. We're seeing a shift from information to targeted solutions that deliver results.



BEAUTY SLEEP REJUVENATION

From anti-aging beauty pillows, to anti-wrinkle patches to TikTok's viral Sleepy Girl Mocktail, the proliferation of beauty sleep hacks casts a light on the growing awareness of how sleep health impacts skin health.

SUPPORTING DATA

From 2018 to 2030 the global sleep aid beverage market is expected to grow by

5.5%
CAGR

43%

Of adults believe it is unsafe to use sleep aids in the long term²

1 in 5

People in the UK aren't getting enough sleep³

52%

Of consumers are looking for skincare products that work specifically while they sleep⁴.



EXAMPLES TO INSPIRE

Cross-category brand examples that are effectively tapping into these emerging spaces.



NIGHTFOOD

PRODUCT & BRAND DESCRIPTION

Nightfood is formulated by sleep and nutrition experts to deliciously satisfy nighttime cravings and nutritionally support better sleep for those who like to snack at night.

WHAT ARE THEY DOING DIFFERENTLY?

Nightfood are delivering on all the category fundamentals including indulgence, classic flavours, and familiar formats but with a better for you proposition that's has minerals, vitamins and amino acids which support sleep quality.

SHOOTS:

SLEEP FRIENDLY SNACKING



SHAPING THE FUTURE

Can functional foods stretch into indulgent, treat-based categories without losing credibility?



TENPM

PRODUCT & BRAND DESCRIPTION

Packed full of sleep-inducing ingredients, TenPM hot chocolate provides a natural supplement to help you fall asleep faster, sleep deeper and wake up feeling refreshed.

WHAT ARE THEY DOING DIFFERENTLY?

From the name, to the logo, to the format, every aspect of TenPM is thoughtfully designed to make it an obvious choice for consumers' evening wind down rituals.

SHOOTS:

NATURAL SUPPLEMENTS



SHAPING THE FUTURE

How can brands tap into existing evening rituals to build scale and frequency through habitual consumption?



Sleep through
your hot flashes



TERRA BY AMIRA

PRODUCT & BRAND DESCRIPTION

A sleep aid designed specifically to help women with menopausal symptoms. This small wearable patch emits cooling pulses to reduce the intensity and frequency of hot flashes, allowing for a more restful and uninterrupted sleep.

WHAT ARE THEY DOING DIFFERENTLY?

Amira revolutionises sleep solutions for this specific demographic, unlike generic sleep aids that often fail to address consumers' specific needs.

SHOOTS:

FROM PASSIVE TO ACTIVE



SHAPING THE FUTURE

How can brands evolve their offering to engage underserved demographics with tailored solutions?



An 8-fold Hyaluronic Acid Complex opulently hydrates all skin layers, both donating and retaining moisture

"Intelligent" Icelandic Moss Cell Extract stimulates cell turnover and boosts collagen production

Chlorella Protein and Allantoin "freeze" the aging process inside the skin cells

BY NACHT

PRODUCT & BRAND DESCRIPTION

Borne out of the belief that perfect skin needs perfect sleep, By Nacht's range of luxury skin care products are designed to enhance sleep quality to improve skin health.

WHAT ARE THEY DOING DIFFERENTLY?

By Nacht single-mindedly focus on sleep as the foundation for beauty, using their platform to educate consumers as well promote their range of 'Sleep Perfectors'.

SHOOTS:

BEAUTY SLEEP REJUVENATION



SHAPING THE FUTURE

How can brands use their platform to meaningfully connect with consumers and educate them on the importance of sleep?



FUTURE PROOFED

Understanding the impact of a changing landscape is crucial to staying ahead and remaining relevant to consumers. Some questions to consider include:

BRAND PROVOCATIONS

1 With caffeine, alcohol and sugar referred to as the enemy of sleep, how can beverage brands maintain relevance during evening occasions?

2 As consumers prioritise sleep for better health, how can brands better position themselves as part of the nightly ritual?

3 In a culture where sleep deprivation is the norm, how can brands offer a meaningful solution?



The case studies on the right illustrate the breadth and depth of our work with brands that live across different occasions within this space.

BRAND & INNOVATION PARTNERS

WHITE SPACE STRATEGY



BRITVIC

Defining future white space opportunities and deep diving into evening drinking occasions and the emerging sleep space.

DISCOVER NOVEL EXPERIENCES



JORDAN'S DORSET RYVITA

Using the midnight cereal snacking insight to explore ways to 'break out of the bowl' and push cereal beyond traditional morning occasions.



THE FUTURE OF SLEEP

THE MOMENT IS NOW

For more support on shaping the future of your
brand or category, get in touch.

GET IN
TOUCH:

HAYLEY ROE

CLIENT SERVICES PARTNER

Mob. +44 (0)7787 546747
hayley.roe@hainesmgregor.co.uk

www.hainesmgregor.co.uk