



RESMED

GLOBAL SLEEP WEEK SURVEY 2023



METHODOLOGY + KEY INSIGHTS

METHODOLOGY

The Allison+Partners Performance + Intelligence team surveyed 20,069 individuals over the age of 18 across the United States, the United Kingdom, Germany, France, Korea, Mexico, Japan, Singapore, Australia, Brazil, China, and India. German, Spanish, Portuguese, Korean, Japanese, French and Simplified Chinese translations were made available to respondents. The survey was fielded using the Qualtrics Insight Platform and panel was sourced from Lucid. Fielding was executed in January 2023.

KEY INSIGHTS

Sleep Habits

- In a typical week, consumers report sleeping approximately 7 hours per night (7.3 hours)
 - Japanese respondents average the lowest number of hours at 6.5, while Brazilian respondents get the most sleep on average at 7.8 hours per night
 - Gen Z and Millennials report getting the most sleep on average (7.5 and 7.4 hours, respectively), while Baby Boomers indicate they are getting the least (6.9 hours)
 - Similarly, those who currently work a fully remote job report getting the most sleep (7.6 hours vs. 7.3 NET) – an increase from 2022 (7.2 hours) – and are the most likely work situation to say they are satisfied with the quantity of sleep they get (72% vs. 64% NET)
- 64% of consumers say they are satisfied with the quantity of their sleep, while 62% are satisfied with the quality – this is an overall increase from 2022, when 55% were satisfied with the quantity of sleep they were getting and 52% were satisfied with their quality of sleep
- Conversely, more than a third of consumers aren't satisfied with the quantity (35%) and quality (37%) of their sleep
 - Indian respondents are the most satisfied with the quantity and quality of their sleep (84% each), while those in the UK are the most likely to say they aren't satisfied with their quantity of sleep and those in Japan the most likely to not be satisfied with the quality of their sleep
 - Gen X are the most likely to say they aren't satisfied with their quantity of sleep (40%) and sit alongside Baby Boomers and the Silent generation in terms of the most likely to not be satisfied with the quality of their sleep (43%, 43% and 49%, respectively)
 - Men are the most likely to be satisfied with both their quantity and quality of sleep (68% and 66% vs. 60% and 58% of women and non-binary people)
- 65% of consumers do not use a sleep tracker to keep records of their sleep patterns and the quality of their sleep
 - Japanese respondents are the most likely to say they do not use a sleep tracker (88%), while the same percentage of Chinese and Indian respondents say they do (47% each)
 - Interestingly, Millennials are among the most likely to say they're satisfied with the quantity of their sleep (65%) – alongside Gen Z (67%) – and are the most likely to use a sleep tracker (43% vs. 35% NET)
- 91% of respondents say they think getting a good amount of sleep each night is important to improving their overall immune system – with two-thirds saying it is extremely important (66%)
 - Gen X and Millennials are the most likely to believe in the importance of good sleep as part of improving their immune system (both 92%) – their Gen Z counterpart, while a high percentage still agree this connection is important, are the least likely generation to say so (88%)
 - Women are the most likely to believe it's important to get a good amount of sleep each night in order to improve their immune system (93% vs. 90% of men and non-binary people)

KEY INSIGHTS, CONT'D

- Almost half of all respondents describe feeling negatively after waking up in the morning (46%), whether it's a sense of tiredness, confusion/fogginess, anxiety, misery, cranky or having a headache. In fact, tiredness is the most common feeling consumers associated with waking up in the morning (23%), though this percentage has dropped from those who reported feeling tired after waking up in the 2022 survey (36%)
 - Among the positive emotions associated with waking up in the morning, consumers most often say they feel refreshed (16%) and calm (15%)
 - Brazilian respondents, who get the most sleep on average, say they usually wake up feeling refreshed (27%), meanwhile Japanese respondents are the most likely to say they feel confused / foggy (21%)
 - Gen X is the most likely to say they still feel tired when they wake up in the morning (25%)
 - Women are more likely to report waking up with a negative feeling in the morning (52%), while men are more likely to wake up feeling positive (58%) - specifically, women most often say they're still tired (26%), while men are evenly split between most often feeling tired and refreshed (19% each)
- Consumers most commonly say they have screen time (e.g. watching TV, gaming, scrolling on social media, etc.) before going to bed to help them fall asleep (45%), followed by reading (31%) and spending time with a loved one/pet (20%)
 - Indian respondents are more likely than other respondents to say that they read to help them fall asleep (41%)
 - Gen Z and Millennials are the most likely to use screen time to help them fall asleep (47% and 46%), with nearly half of each group indicating they do so
 - Gen Z are also the most likely generation to say that they simply stay up later to help them fall asleep (17%)
 - Millennials are the most likely to take a sleep aid or a medication (22% vs. 19% NET)
 - Men are the most likely to turn to exercising before bed to help them fall asleep (18% vs. 13% women and non-binary people)
- 49% of respondents say their doctor has not ever proactively asked them about their quality of sleep, a dip compared to the past two years (67% in 2022 and 54% in 2021), while 51% say their doctor has done so
 - Japanese respondents are the most likely to say their doctor has not asked about their quality of sleep (79%) - more so than any other country surveyed
 - Doctors in the India are most likely to ask patients about the quality of their sleep, at 67%
 - Millennials are much more likely to say that their doctor has proactively asked about their quality of sleep (57%), while Baby Boomers and Silent generation most often say their doctor hasn't done so proactively (65% and 68%, respectively)
- While most individuals do not consider snoring a sign of good sleep (62%), nearly one-third say they do (32%)
 - More than half of respondents in India (58%) consider snoring a sign of good sleep
 - The younger generations, Gen Z and Millennials, are the most likely to consider snoring to be a sign of good sleep (40% and 34%, respectively), while Baby Boomers and Gen X are the most likely to disagree (75% and 68%, respectively)
 - Men and non-binary people are the most likely to consider snoring to be a good sign of sleep (35% vs. 29% women)

KEY INSIGHTS, CONT'D

- Consumers most often say that anxiety / depression and work-related concerns are likely to keep them up at night (33% each)
 - Other prominent factors that are likely to keep individuals up at night are noises from outside the bedroom (e.g. traffic, pets, etc.), financial pressures, and family or relationship issues (25% each)
 - Anxiety and depression are most commonly listed as being likely to keep individuals up at night amongst Brazilian and US consumers (46% and 45%, respectively) - this is also the case for Gen Z and Millennials (34% and 35%)
 - Gen Z and Millennials, who were the most likely to say they used screen time to help them fall asleep, are also the most likely to believe that screens/electronic devices are keep them up at night (31% and 25%, respectively)
 - Women and non-binary people most often say that anxiety and depression keep them up at night (36% and 25%, respectively), while men most often say that work-related concerns are likely to keep them from sleeping (34%)
- Individuals say that when they get a good night's rest, they are more likely to be more productive at work (47%), more patient with others (41%), and more alert / attentive (37%)
 - Gen Z and Millennials are the most likely to say that with a good night's sleep, they're more likely to go to the gym (26% and 27% vs. 24% NET) or learn a new skill (both 29% vs. 26% NET) than when they've slept poorly
 - This is the same case with men, with a quarter of them saying they'd be more likely to learn a new skill (26%) and go to the gym (25%) after a good night's rest
 - Individuals who work in-person or in a hybrid format are the most likely to say that when they've gotten a good night's rest, they're likely to be more productive at work – more so than those who work fully remote (53%, 53% and 46%, respectively)
- While roughly half of respondents say they wake up (49%) and go to bed (47%) around the same time as they did before the COVID-19 pandemic began, consumers more often say that their sleep behavior has changed– whether that be waking up or going to bed at a different time (51% and 53%, respectively)
 - Interestingly, consumers most often report going to bed later than they did before the pandemic (33%), while waking up earlier (29%)
- Over the past year, 39% of respondents say that their quality of sleep has stayed about the same, while 32% say it has gotten better and 29% indicate their sleep has gotten worse
 - Among respondents whose quality of sleep has declined over the past year, added stress / worry (53%), anxiety / depression (40%), and too many screens / electronic devices (33%) are most often attributed as the cause
 - Nearly one-third say that financial pressures have caused the decline in their sleep quality (32%), with those in India (37%), Mexico (39%) and the U.S. (41%) the most likely to say so

KEY INSIGHTS, CONT'D

- Those who say their sleep has improved since this time last year attribute the increase in sleep quality to improved health (42%) and a better / more consistent routine (40%)
 - 38% of consumers in India report that meditation has improved their sleep quality in the past year – more so than any other country surveyed (25% NET)
- Gen Z is the generation most likely to say their sleep has gotten worse overall in the past year (31%). However, they're pretty evenly split in their experiences, as they're also among the most likely to say their sleep has gotten better (38%), coinciding with Millennials (36%)
 - Gen Z are the most likely to feel like their sleep has declined because of too many screens/electronic devices (42%) and a lack of, or change in, routine (37%)
 - Gen X, Baby Boomers and the Silent generation are the most likely to feel their sleep has declined due to a confirmed or suspected health issue (22%, 28% and 44%, respectively)
 - Meanwhile, Millennials who have been sleeping better in the past year most often attribute it to improved health (45%) and a better, or more consistent, routine (43%)
- Men are most likely to say that their sleep has improved over the past year (34% vs. 31% women and non-binary people), while women most often say their sleep has worsened during this time (32% vs. 26% men and non-binary people)
 - Among consumers whose sleep has improved in the past year, men are the most likely to cite improved health (46%) as the source, while women say they now have a better, or more consistent, routine (41%)
- Those working a fully remote or hybrid format are the most likely work situations to say their sleep has gotten better over the past year (43% and 37%, respectively). Furthermore, 34% of those fully remote and 29% of hybrid workers say that their work situation has caused this increase in sleep quality (compared to 22% of in-person workers)
- Overall, 60% of consumers believe that stress has been affecting their sleep since COVID-19, with one in five saying it's affected their sleep a lot (19%). This is an uptick since 2022, when 46% indicated that stress had impacted their sleep since the pandemic
 - Individuals in Brazil, India and the U.S. are the most likely to say stress has been affecting their sleep a lot since COVID-19 (23%, 28% and 24%, respectively)
 - Millennials are the most likely generation to say that stress has affected their sleep since COVID-19 (65%)
 - Women are the most likely to say that stress has been affecting their sleep since COVID-19 (63% vs. 57% men and non-binary people), with 1 in 5 saying it's affected their sleep a lot (20%)

KEY INSIGHTS, CONT'D

Sleep Conditions

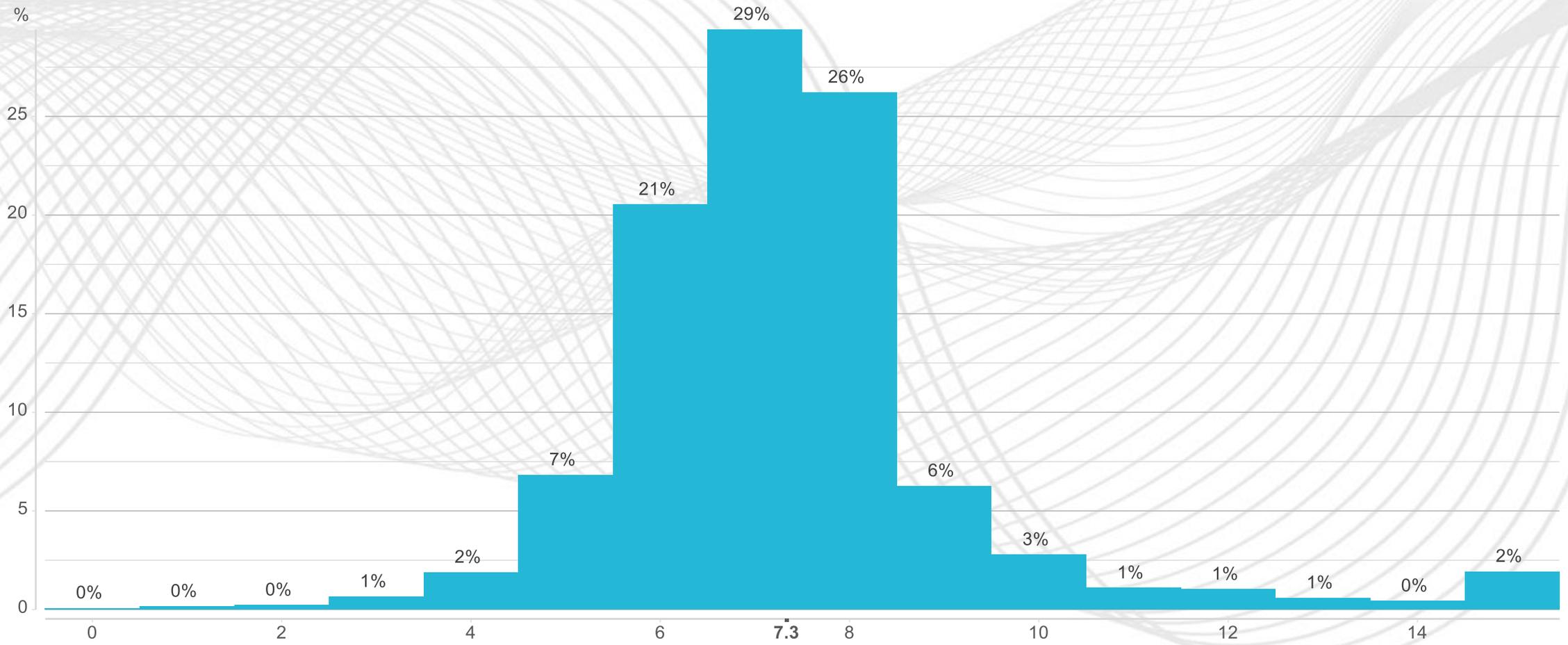
- 81% of respondents report experiencing one or more of the provided Obstructive Sleep Apnea symptoms, related to their sleep quality
 - Individuals most commonly say they've noticed symptoms like mood changes (e.g. depression, irritability) (33%), waking up with a dry mouth or sore throat (30%), and difficulty concentrating during the day (30%) in relation to their sleep quality
 - Millennials and Gen Z are the most likely to have noticed one or more of OSA-related sleep symptoms (both 84%), with both generations most often saying their mood changes has been noticeable in relation to their sleep quality (38% and 33%, respectively)
 - Gen X and Millennials are the most likely to have noticed themselves loudly snoring (18% and 17%) - this is also the case among men (18%), who are also most likely to have noticed high blood pressure (11%) in relation to their sleep quality
 - 37% of respondents who have experienced one or more of the symptoms in relation to their sleep quality have never heard of the condition they relate to – Obstructive Sleep Apnea (OSA)
 - Nearly a quarter of those who have experienced at least one symptom of OSA have either already been diagnosed it, but aren't on any treatment, or believe they suffer from it, but haven't been diagnosed or received treatment for their symptoms (22%)
 - Those in Brazil and India are the most likely to say so (28% and 27%, respectively), along with Millennials (25%) and men/non-binary people (25%)
- 35% of individuals report never having sought help with their sleep – a decline from the 48% who indicated such in 2022. However, of those that have sought help, 19% have gone to a family member – more so than those who report going to a medical provider (17%)
 - Those Gen X and older are the most likely to say they've never sought help with their sleep, with nearly half of this group saying so (46%)
 - Women are also the most likely to have never sought help with their sleep, with more than one-third saying so (36%). They're also the most likely to say that they've thought about seeking help, but have never gone through with it (11% vs. 10% NET)
 - Gen Z and Millennials are the most likely to have gone online for help – whether on social media, online communities or online resources (33% Gen Z and 38% Millennials)
- One-third (33%) of respondents claim that they haven't been tested for sleep apnea or sought medical help for other sleep conditions because they believe they do not have sleep-related issues
 - 29% say have not been tested, but they are interested in, or considering, getting tested – this is even more so the case for Millennials, with a third of them saying so (33%)
 - 31% of women say the same

KEY INSIGHTS, CONT'D

- Those who have been tested, or are interested in being tested, most often say that not knowing how to get started (34%), concerns about the cost of treatment (31%), and fear of potential results (27%) are barriers to seeking treatment
 - There's been a slight increase in those that say the cost of treatment is a barrier to seeking treatment, compared to 2022 (26%)
 - Those in China and India are the most likely to say that doubting treatment will improve their overall health has been a barrier (34% and 30%, respectively, vs. 25% NET)
 - Men are the most likely to say that being worried about perceptions and stigma have been a barrier for seeking treatment for their sleep-related issue(s) (16% vs. 15% NET)

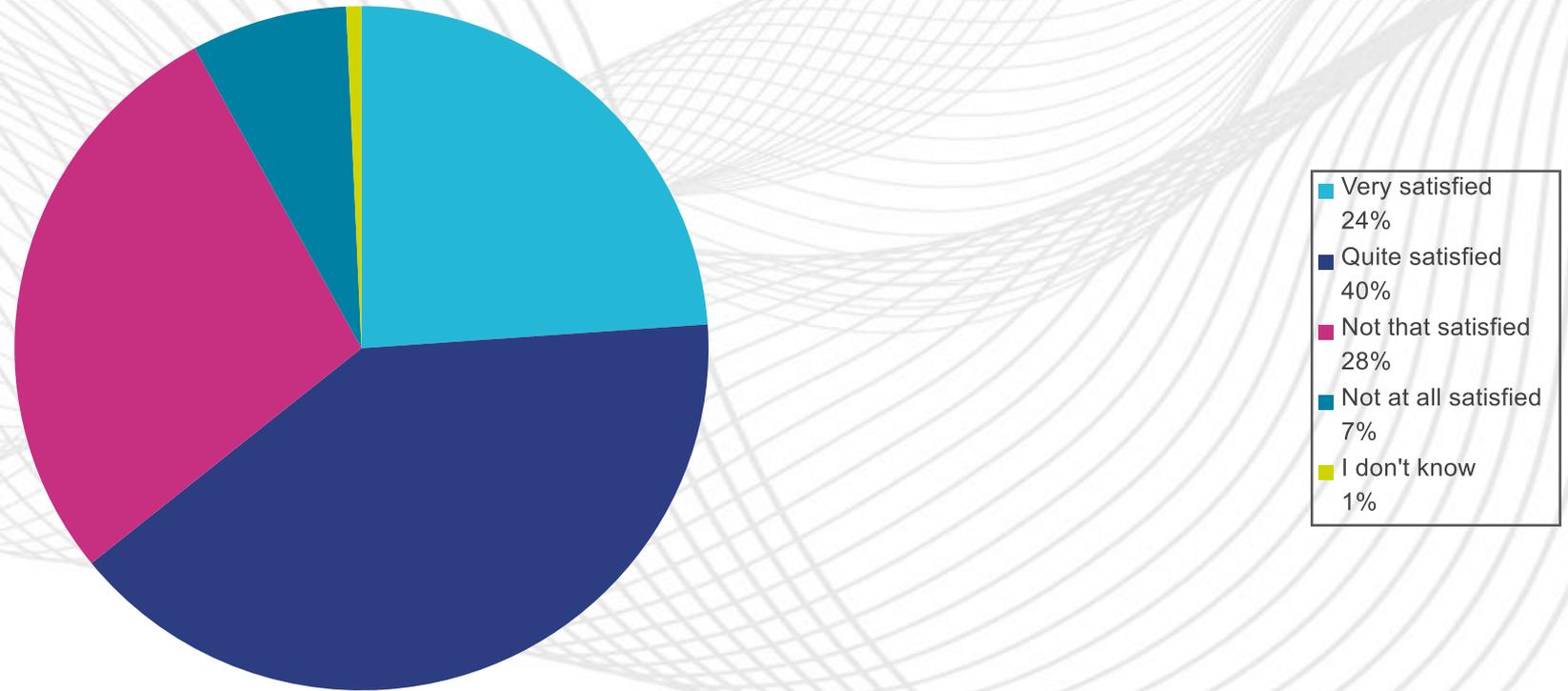
SURVEY FINDINGS

How much sleep do you get per night during a typical week? - 0-15 hours



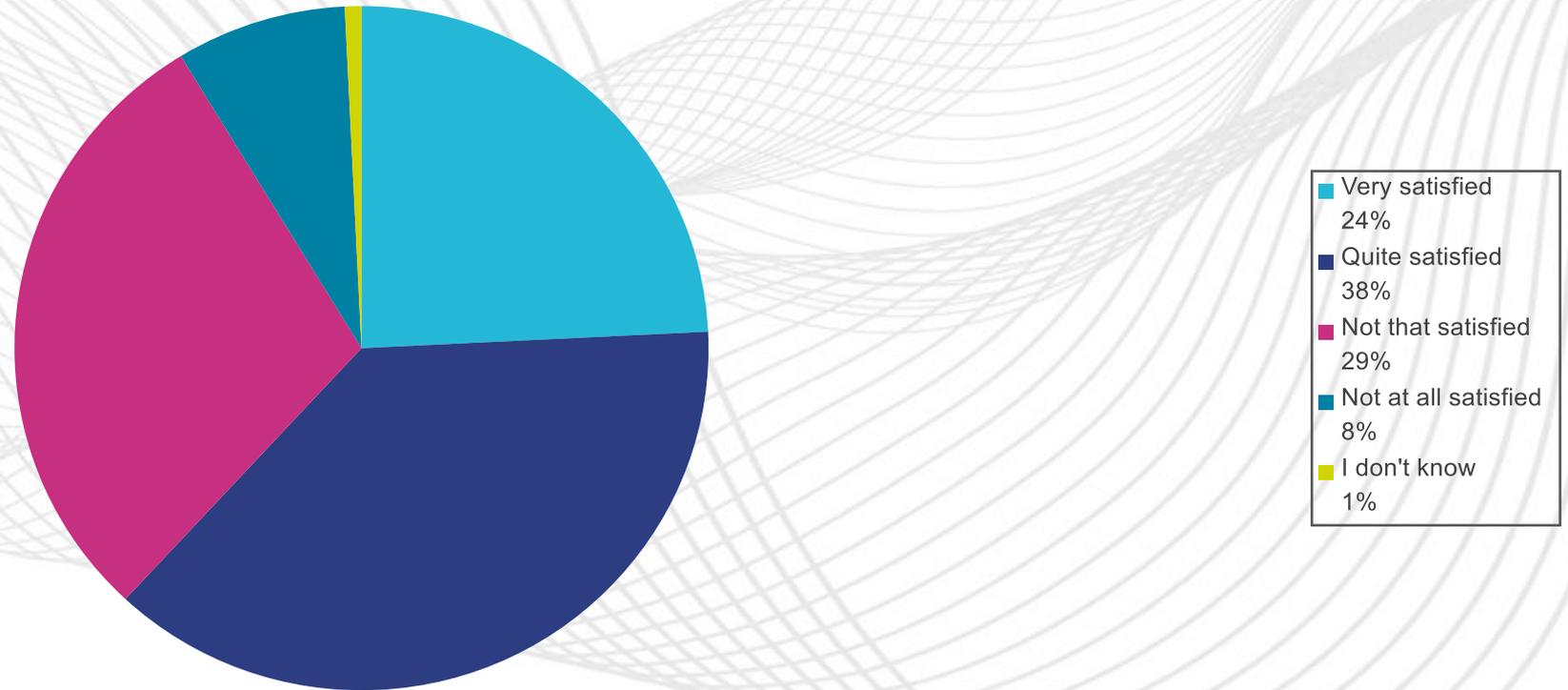
How much sleep do you get per night during a typical week? - 0-15 hours SUMMARY

How satisfied are you with the following? - Quantity of your sleep



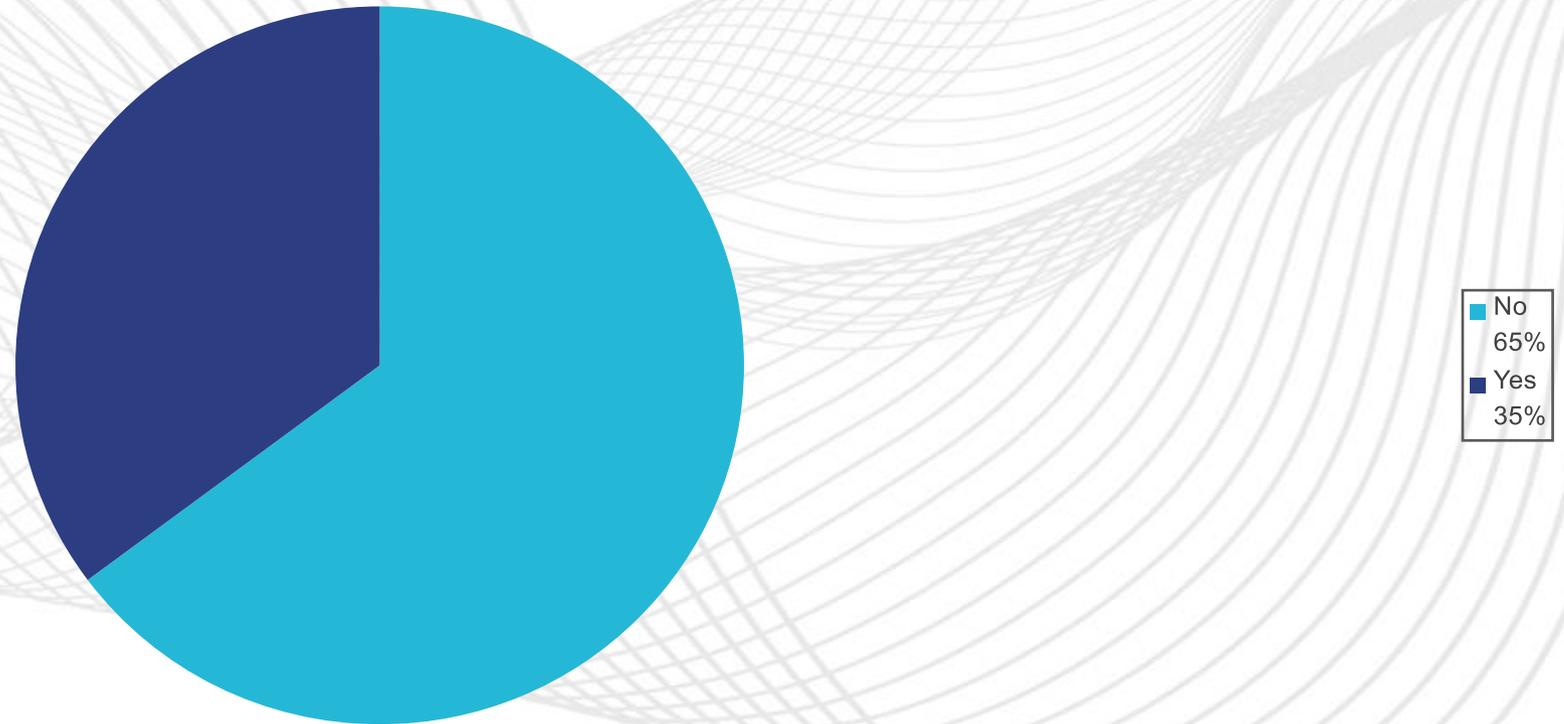
How satisfied are you with the following? - Quantity of your sleep SUMMARY
sample size = 20069

How satisfied are you with the following? - Quality of your sleep



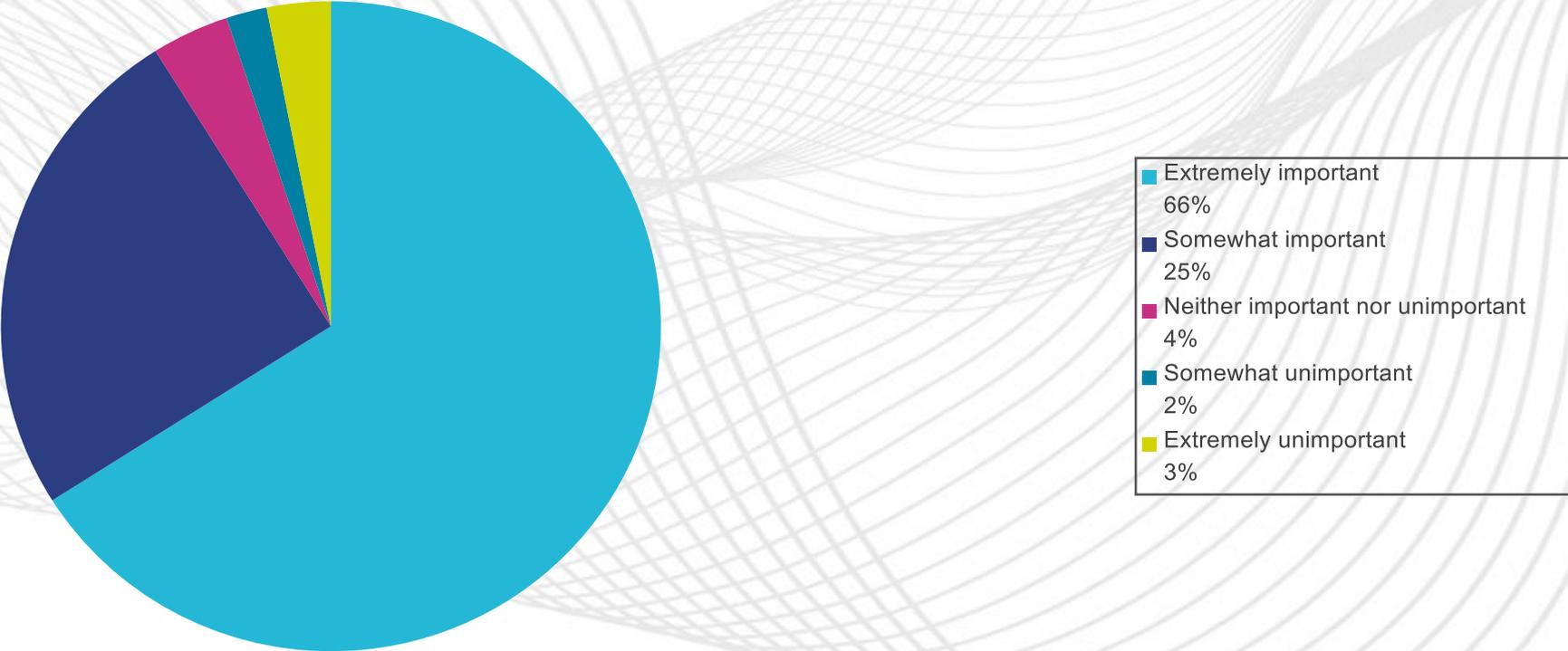
How satisfied are you with the following? - Quality of your sleep SUMMARY
sample size = 20069

Do you use a sleep tracker to keep records of your sleep patterns and the quality of your sleep?



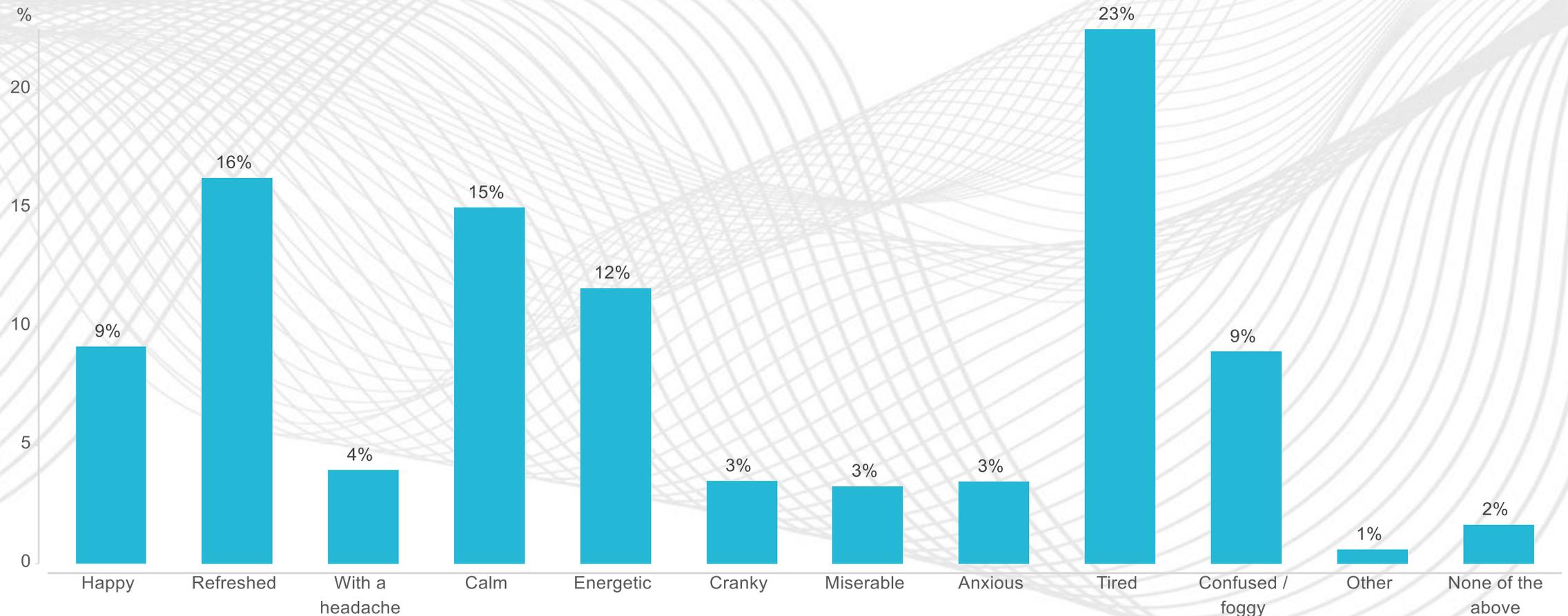
Do you use a sleep tracker to keep records of your sleep patterns and the quality of your sleep? SUMMARY
sample size = 20069

How important do you think getting a good amount of sleep each night is to improving your overall immune system?



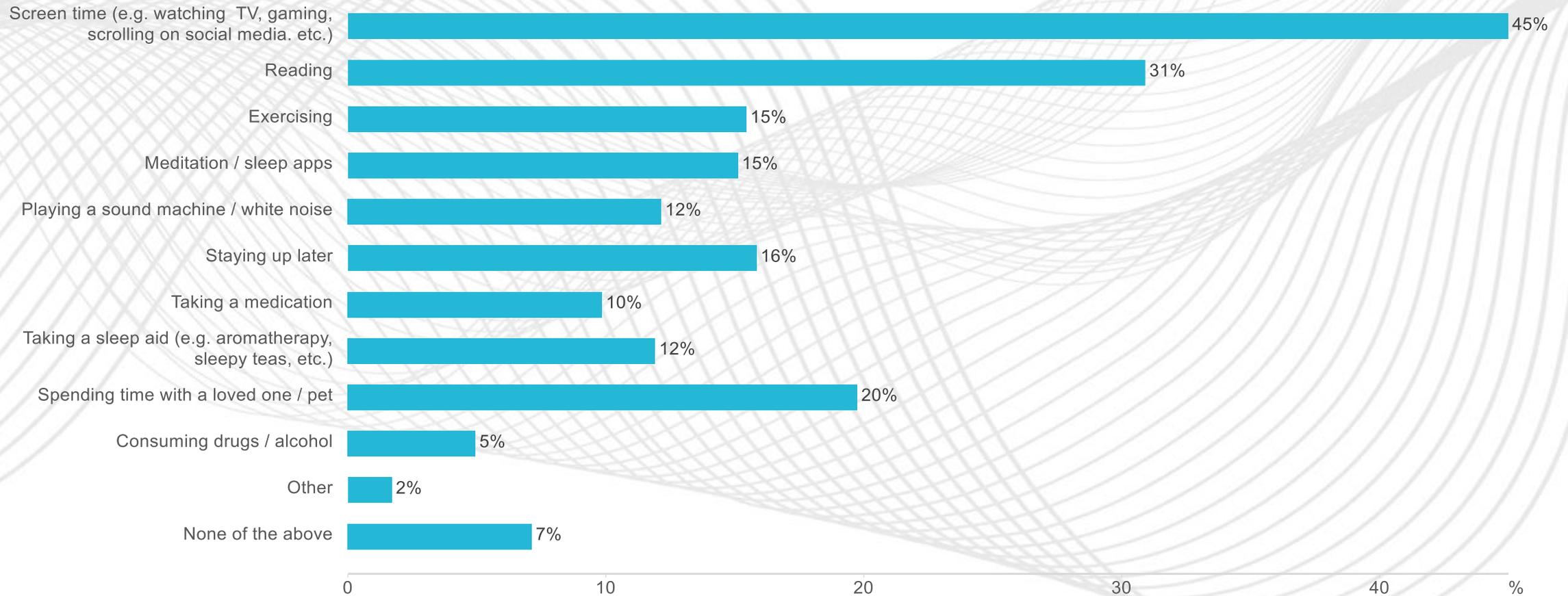
How important do you think getting a good amount of sleep each night is to improving your overall immune system? SUMMARY
sample size = 20069

Which of the following best describes how you usually feel after waking up in the morning? - Selected Choice



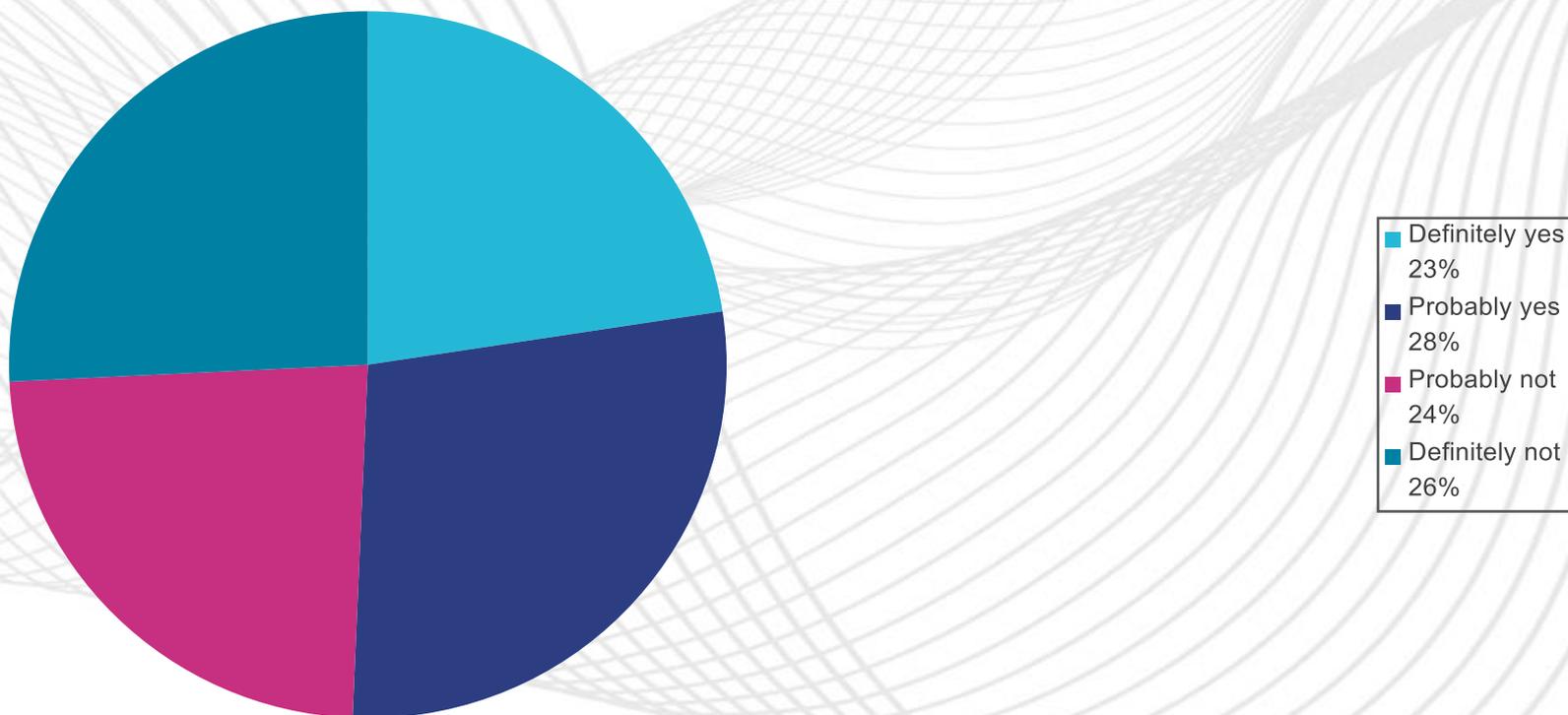
Which of the following best describes how you usually feel after waking up in the morning? - Selected Choice SUMMARY
sample size = 20069

Which of the following activities do you do before going to bed to help you fall asleep? Select all that apply.



Which of the following activities do you do before going to bed to help you fall asleep? Select all that apply. SUMMARY
sample size = 20069

Has your doctor ever proactively asked you about the quality of your sleep?



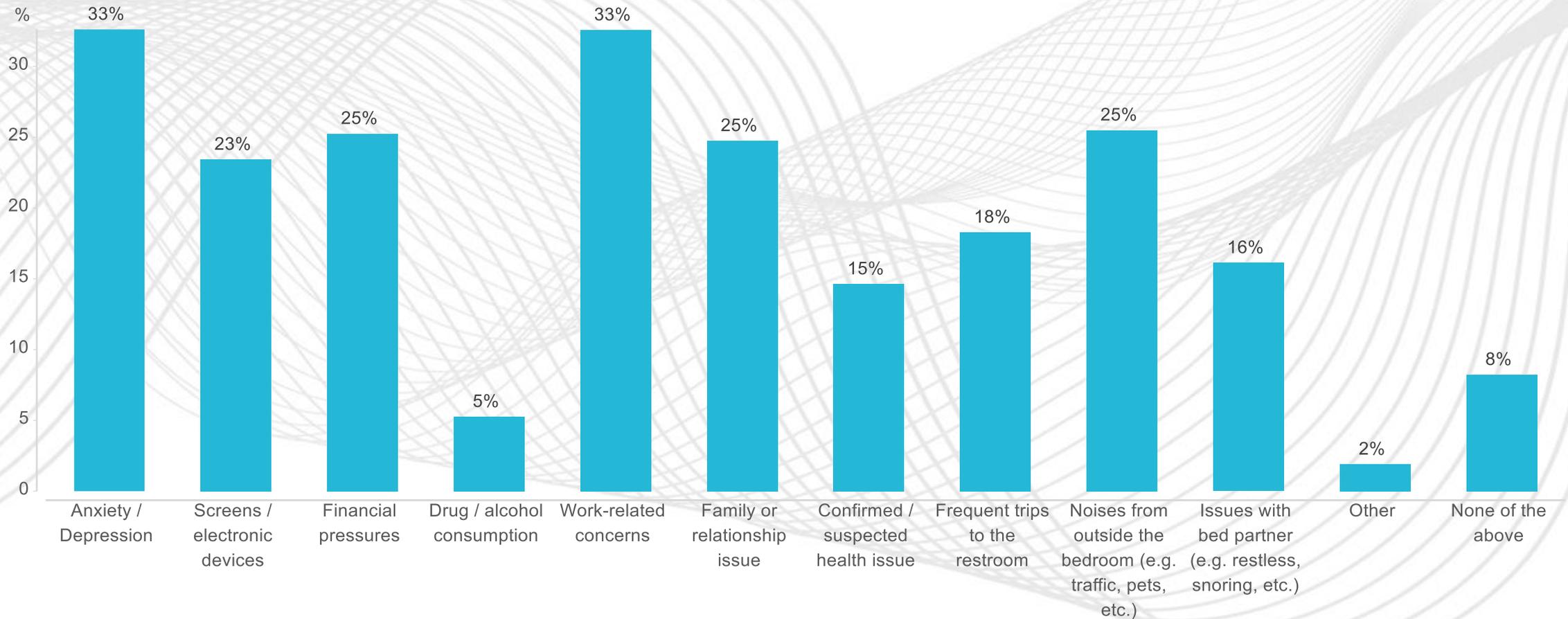
Has your doctor ever proactively asked you about the quality of your sleep? SUMMARY
sample size = 20069

Do you consider snoring to be a sign of good sleep?



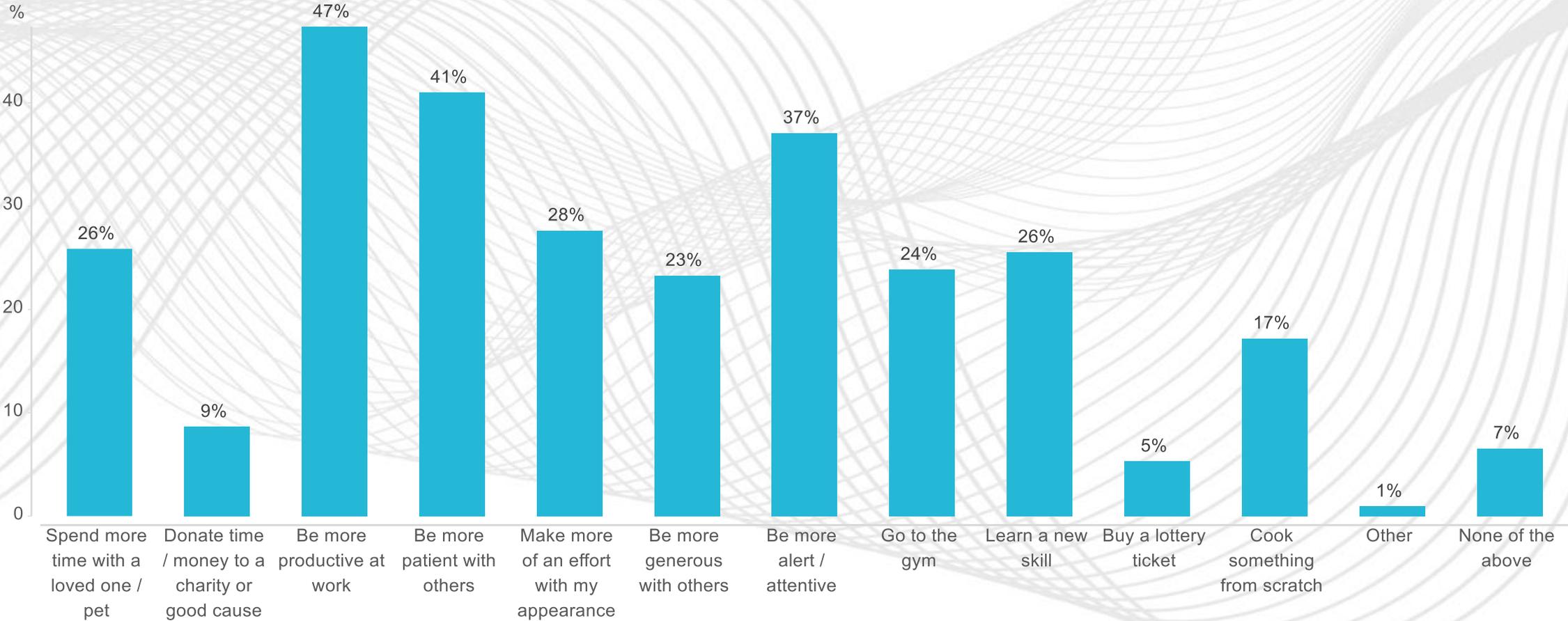
Do you consider snoring to be a sign of good sleep? SUMMARY
sample size = 20069

What, if anything, is likely to keep you up at night?



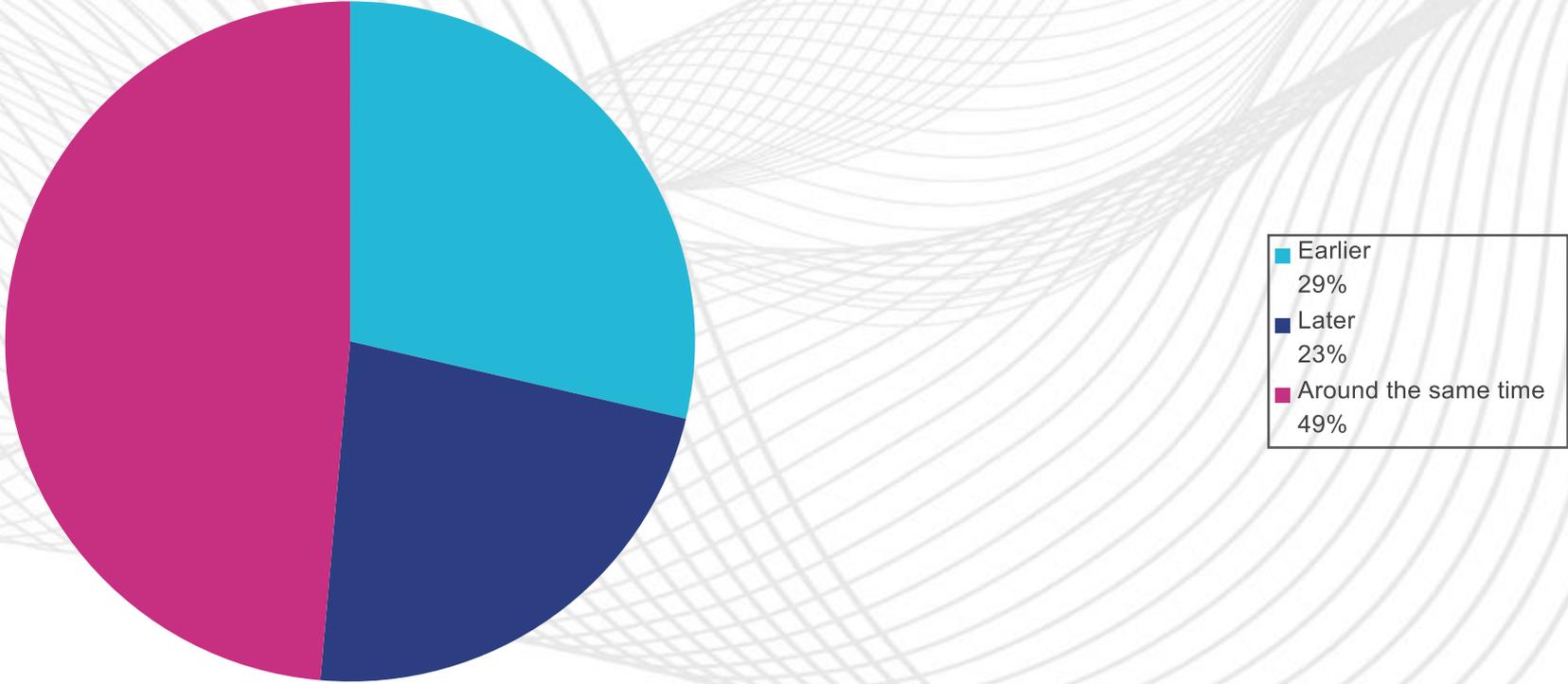
What, if anything, is likely to keep you up at night? SUMMARY
sample size = 20069

Which of the below are you more likely to do when you've gotten a good night's rest, as opposed to when you don't? Select all that apply.



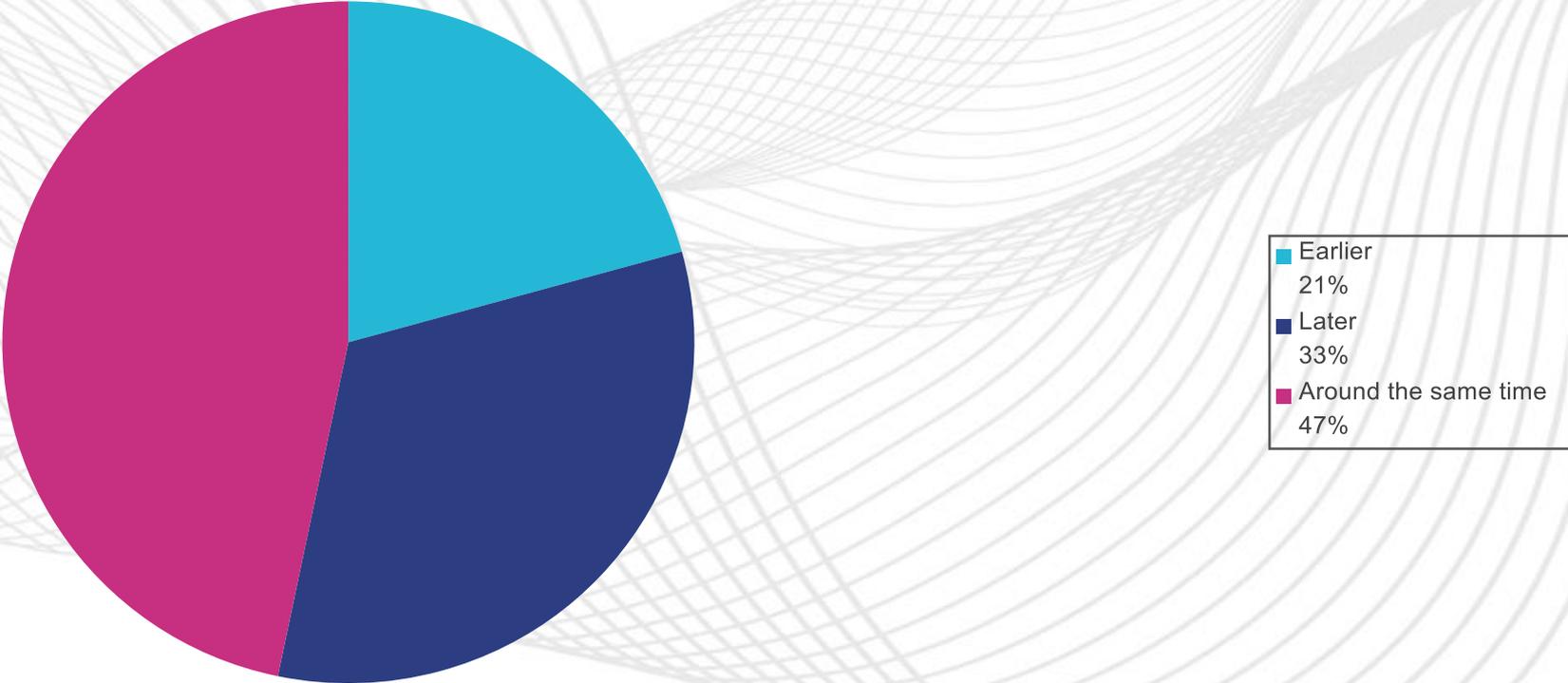
Which of the below are you more likely to do when you've gotten a good night's rest, as opposed to when you don't? Select all that apply. SUMMARY
sample size = 20069

Do you wake up earlier, later, or around the same time as you did before the COVID-19 pandemic began?



Do you wake up earlier, later, or around the same time as you did before the COVID-19 pandemic began? SUMMARY
sample size = 20069

Do you go to bed earlier, later, or around the same time as you did before the COVID-19 pandemic began?



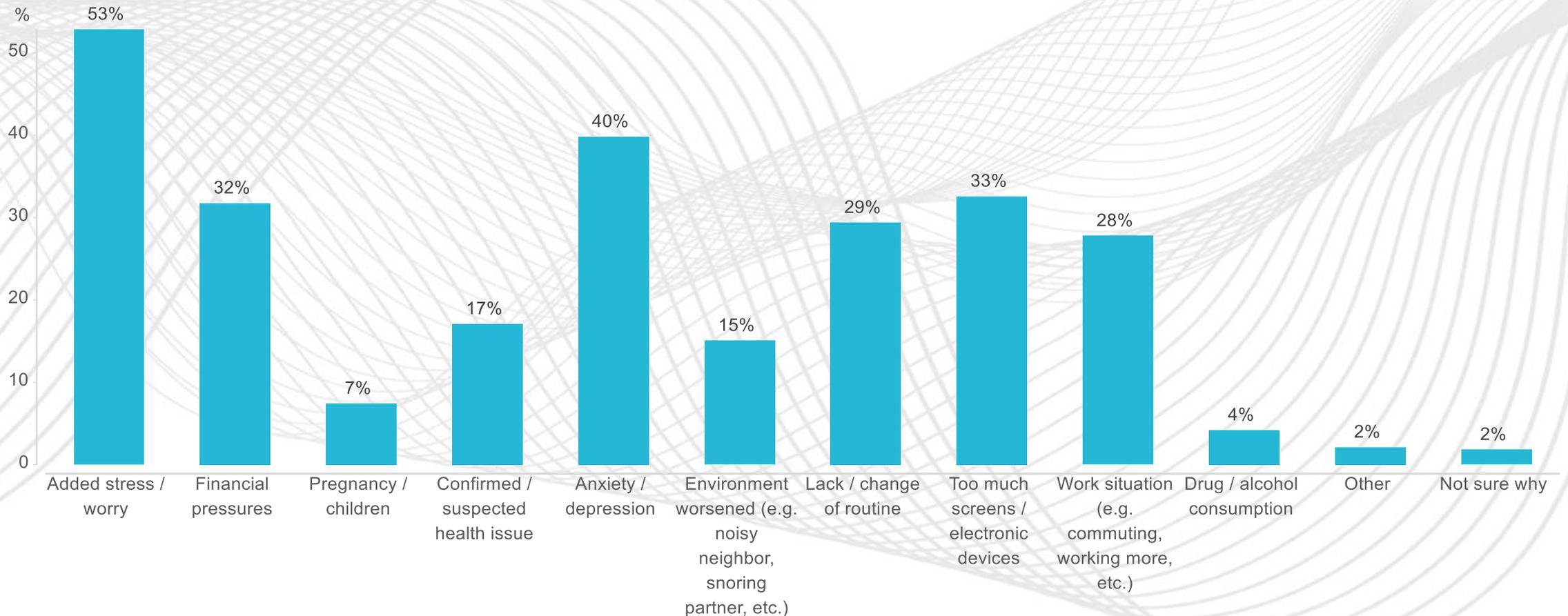
Do you go to bed earlier, later, or around the same time as you did before the COVID-19 pandemic began? SUMMARY
sample size = 20069

Over the past year, how has your sleep changed overall?



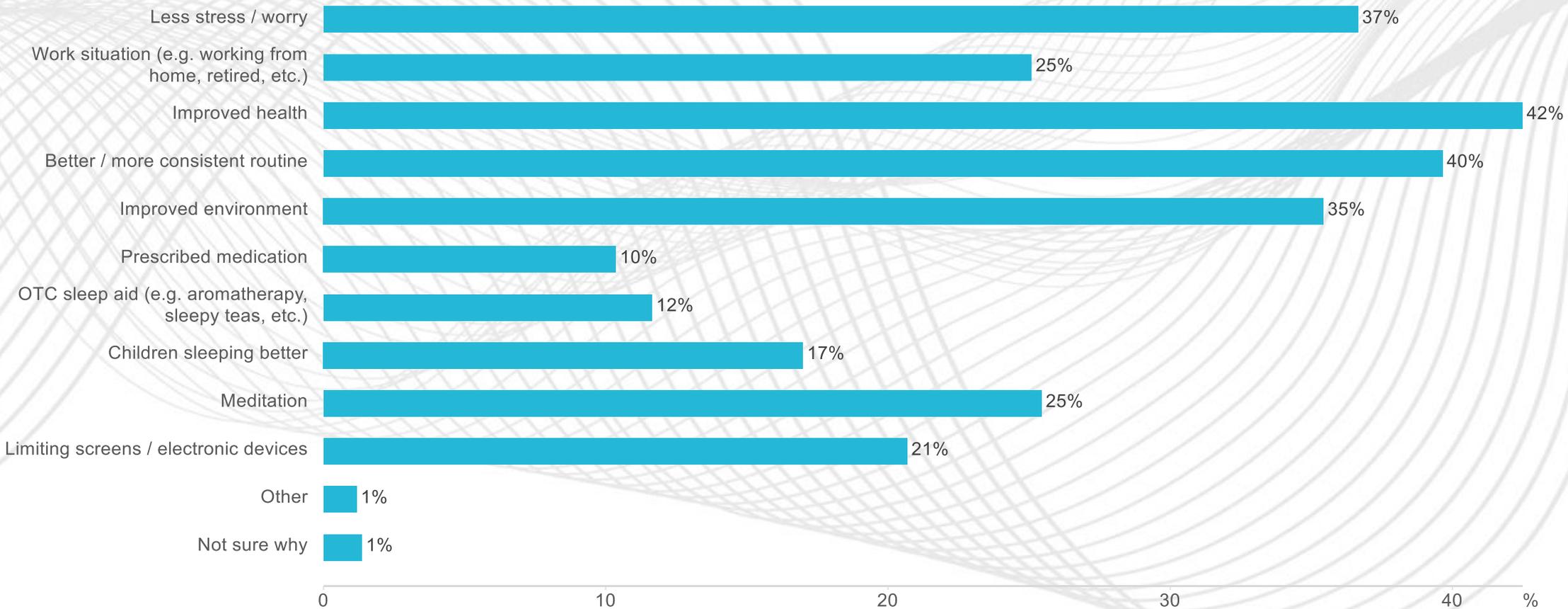
Over the past year, how has your sleep changed overall? SUMMARY
sample size = 20069

You indicated the quality of your sleep has declined compared to this time last year. What do you feel has caused this decline in sleep quality? Select all that apply.



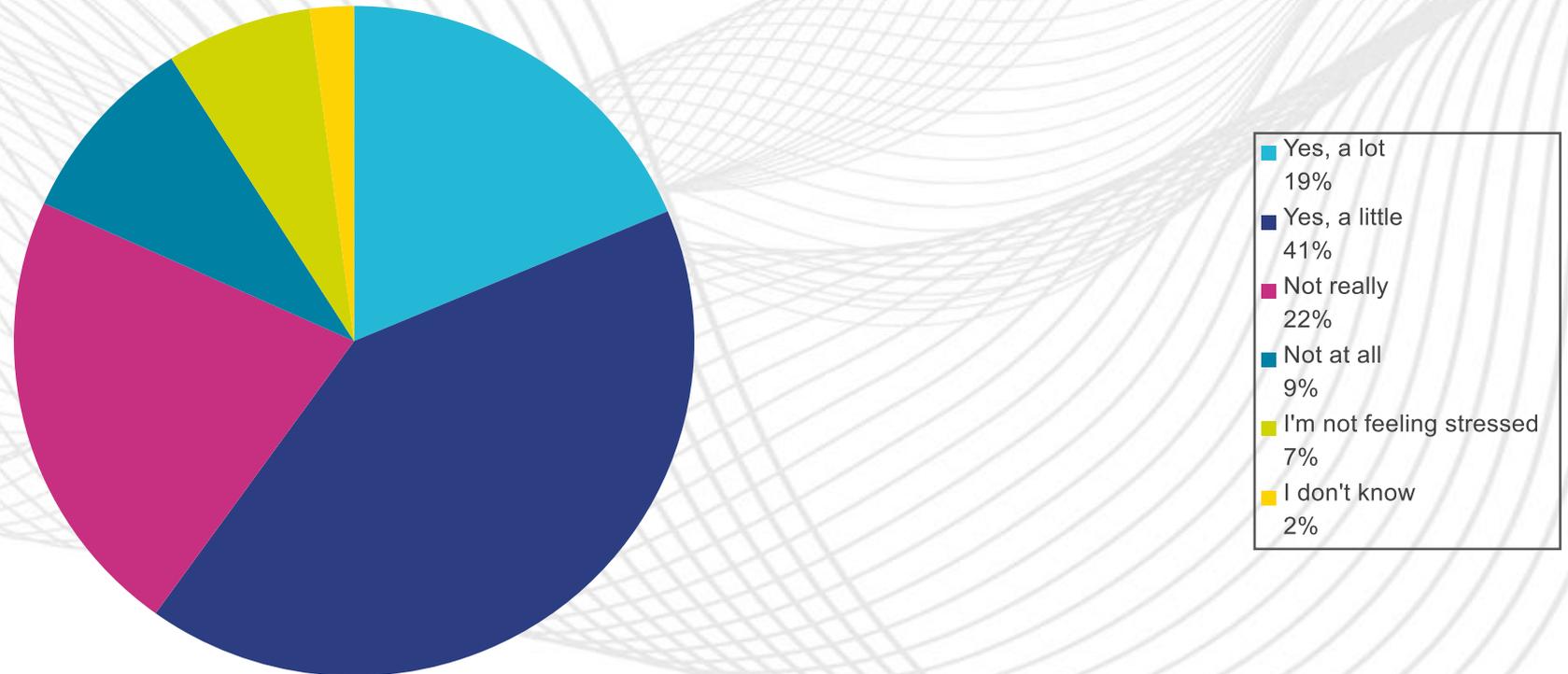
You indicated the quality of your sleep has declined compared to this time last year. What do you feel has caused this decline in sleep quality? Select all that apply. SUMMARY
sample size = 5730; total sample size = 20069; 14339 missing

You indicated the quality of your sleep has improved compared to this time last year. What do you feel has caused this increase in sleep quality? Select all that apply.



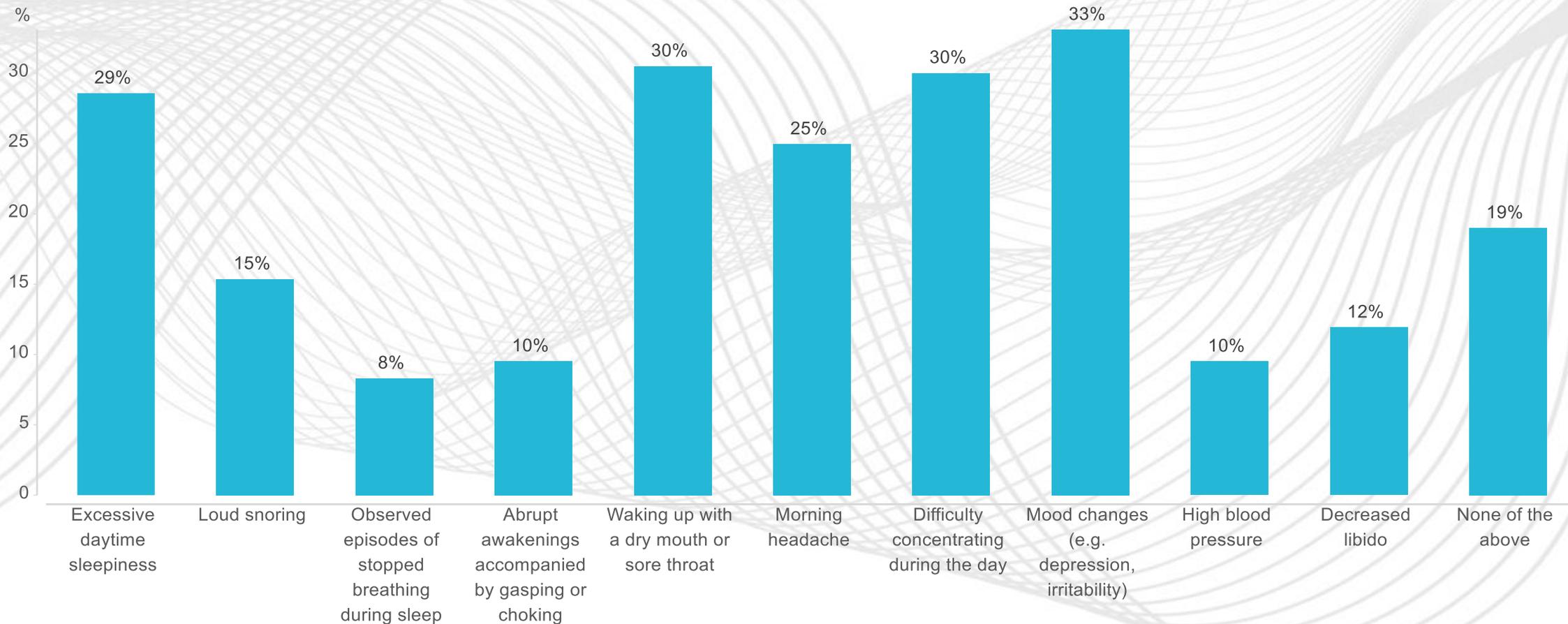
You indicated the quality of your sleep has improved compared to this time last year. What do you feel has caused this increase in sleep quality? Select all that apply. SUMMARY
sample size = 6469; total sample size = 20069; 13600 missing

Has stress been affecting your sleep in any way since COVID-19?



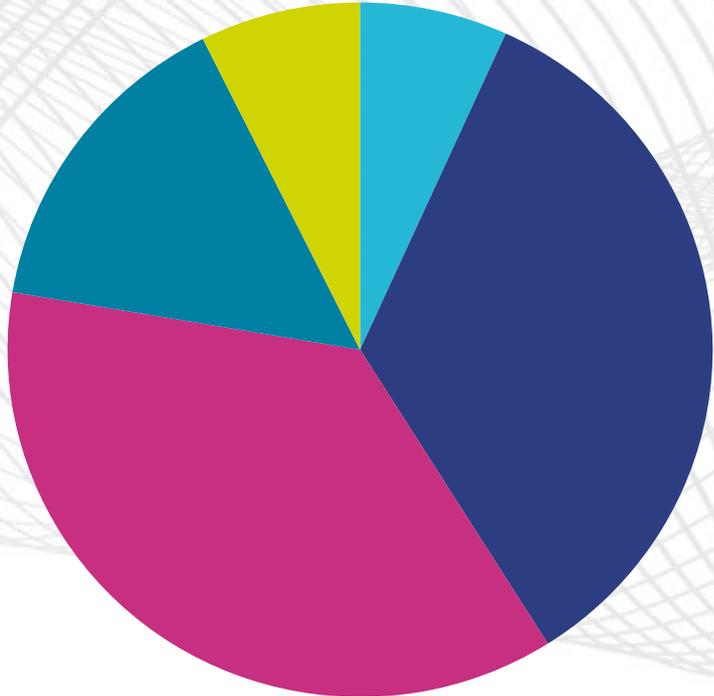
Has stress been affecting your sleep in any way since COVID-19? SUMMARY
sample size = 20069

Have you noticed any of the following symptoms, in relation to your sleep quality? Select all that apply.



Have you noticed any of the following symptoms, in relation to your sleep quality? Select all that apply. SUMMARY
sample size = 20069

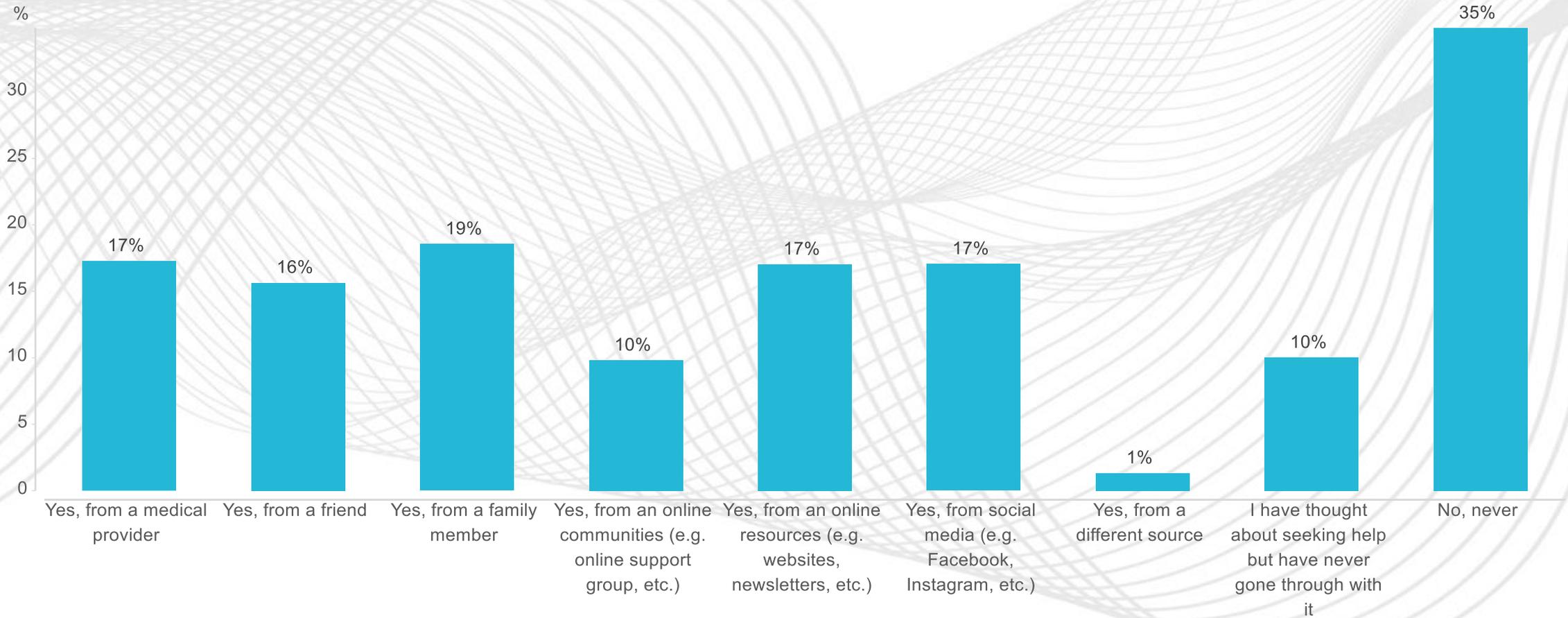
You indicated that you've experienced one or more of the symptoms listed on the previous question, in relation to your sleep quality. These symptoms are related to a condition called Obstructive Sleep Apnea (OSA). Have you ever heard of this condition before?



- Yes, I have been diagnosed with it and am on CPAP treatment
7%
- Yes, I've heard of it, but I don't suffer from it
34%
- No, I have never heard of it before
37%
- Yes, I believe I suffer from it, but haven't been diagnosed or received treatment
15%
- Yes, I have been diagnosed with it, but am not on any treatment
7%

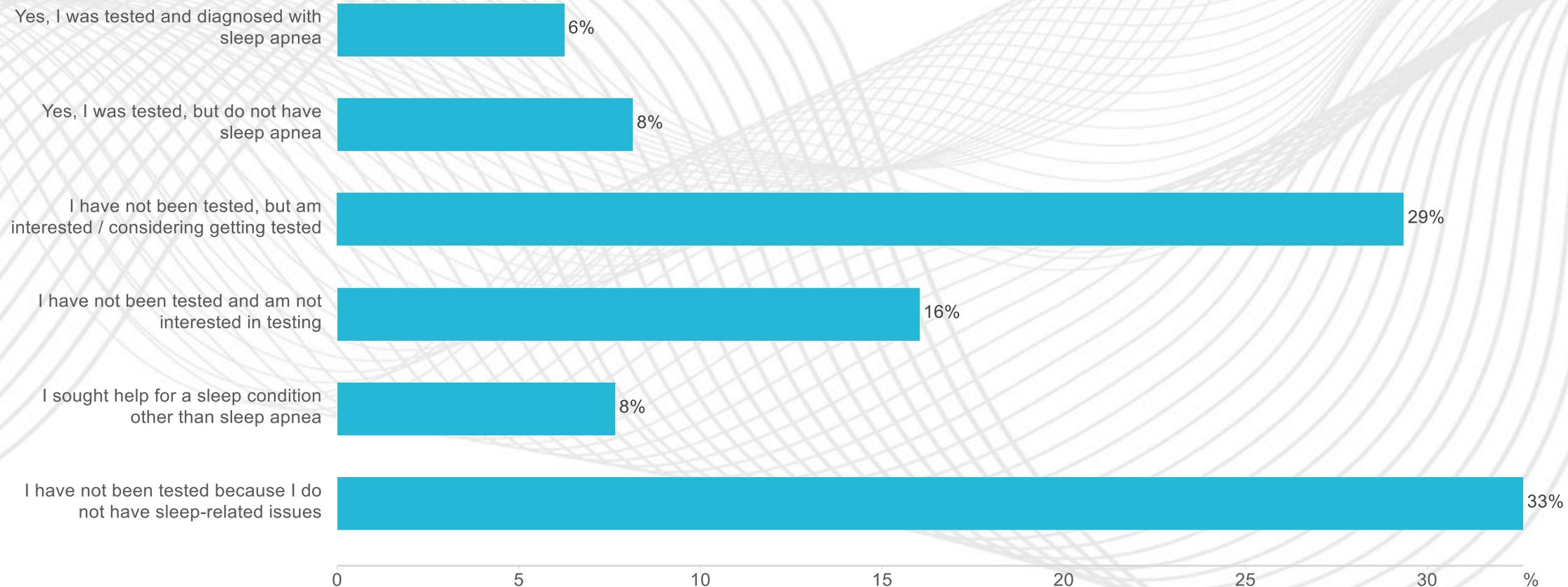
You indicated that you've experienced one or more of the symptoms listed on the previous question, in relation to your sleep quality. These symptoms are related to a condition called Obstructive Sleep Apnea (OSA). Have you ever heard of this condition before? SUMMARY
sample size = 16257; total sample size = 20069; 3812 missing

Have you ever sought help with your sleep? Select all that apply.



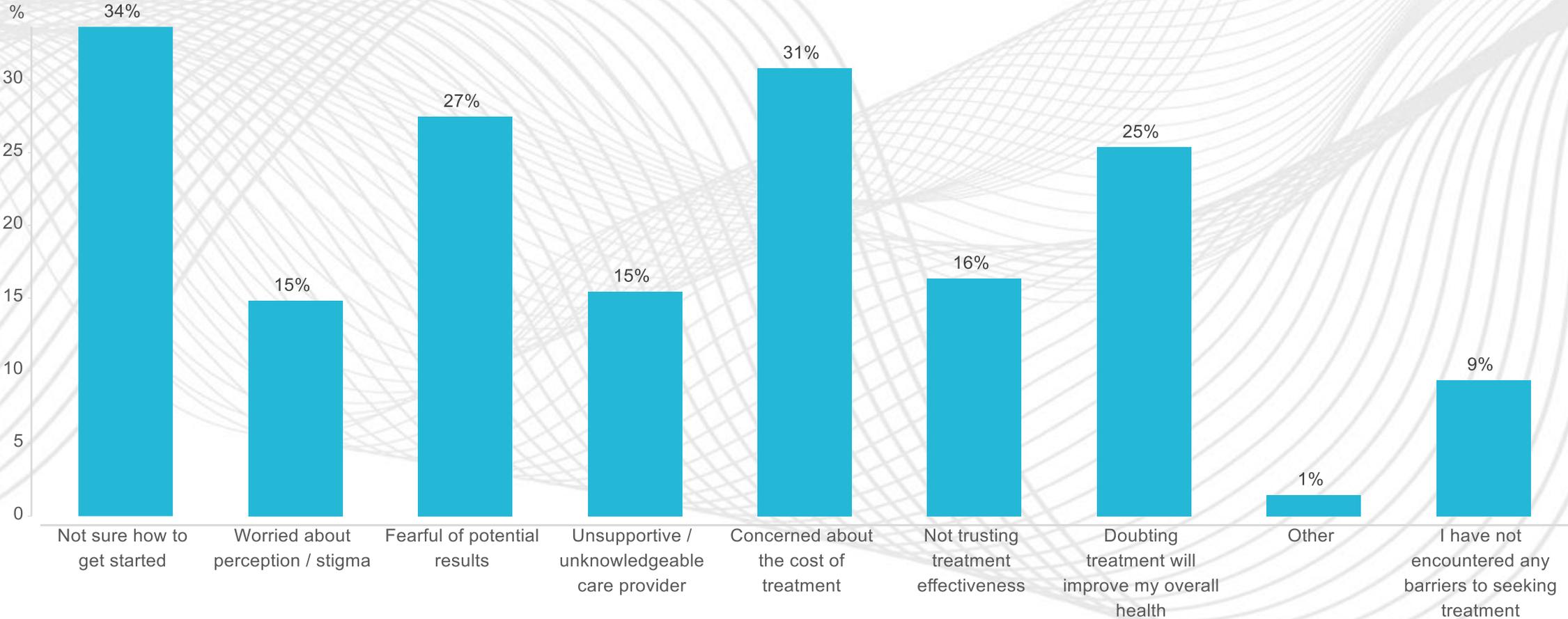
Have you ever sought help with your sleep? Select all that apply. SUMMARY
sample size = 20069

Have you ever been tested for sleep apnea, or sought medical help for another sleep condition?



Have you ever been tested for sleep apnea, or sought medical help for another sleep condition? SUMMARY
sample size = 20069

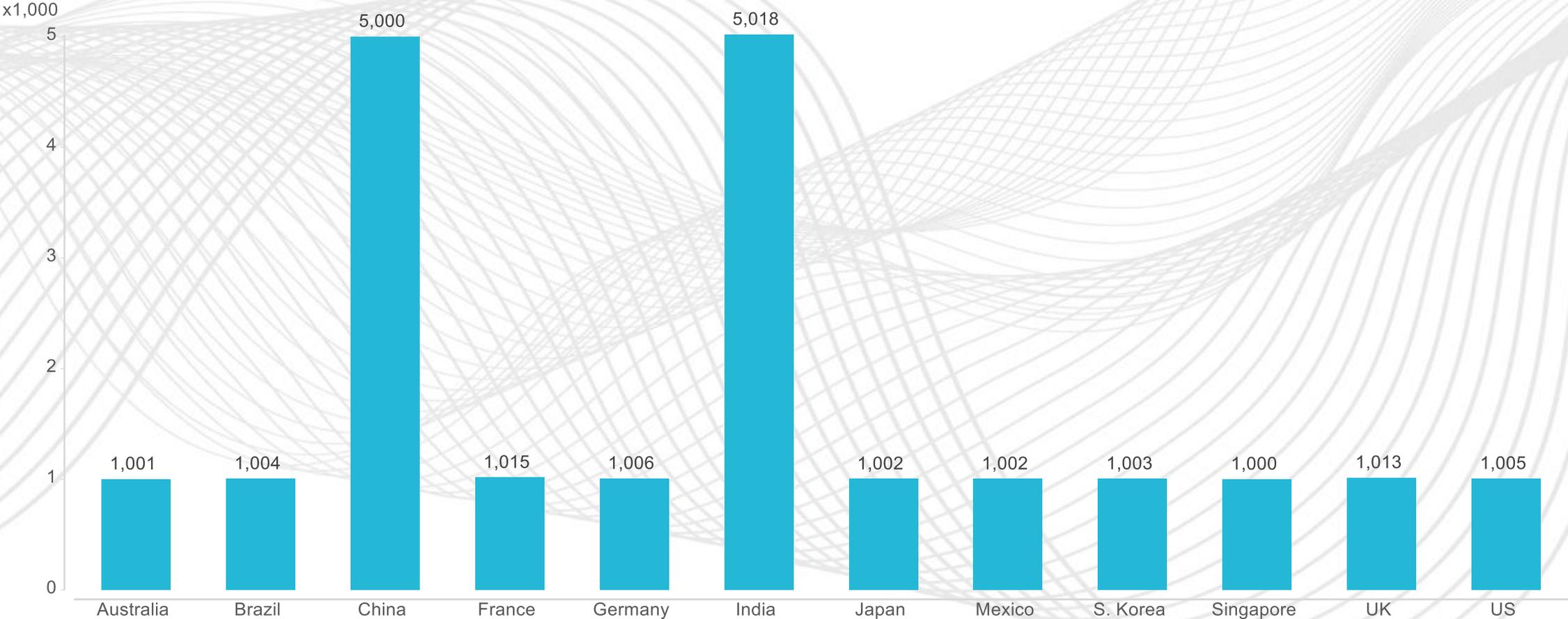
Which of the following have been barriers for seeking treatment for your sleep related issue(s)? Please select all that apply.



Which of the following have been barriers for seeking treatment for your sleep related issue(s)? Please select all that apply. SUMMARY
sample size = 10307; total sample size = 20069; 9762 missing

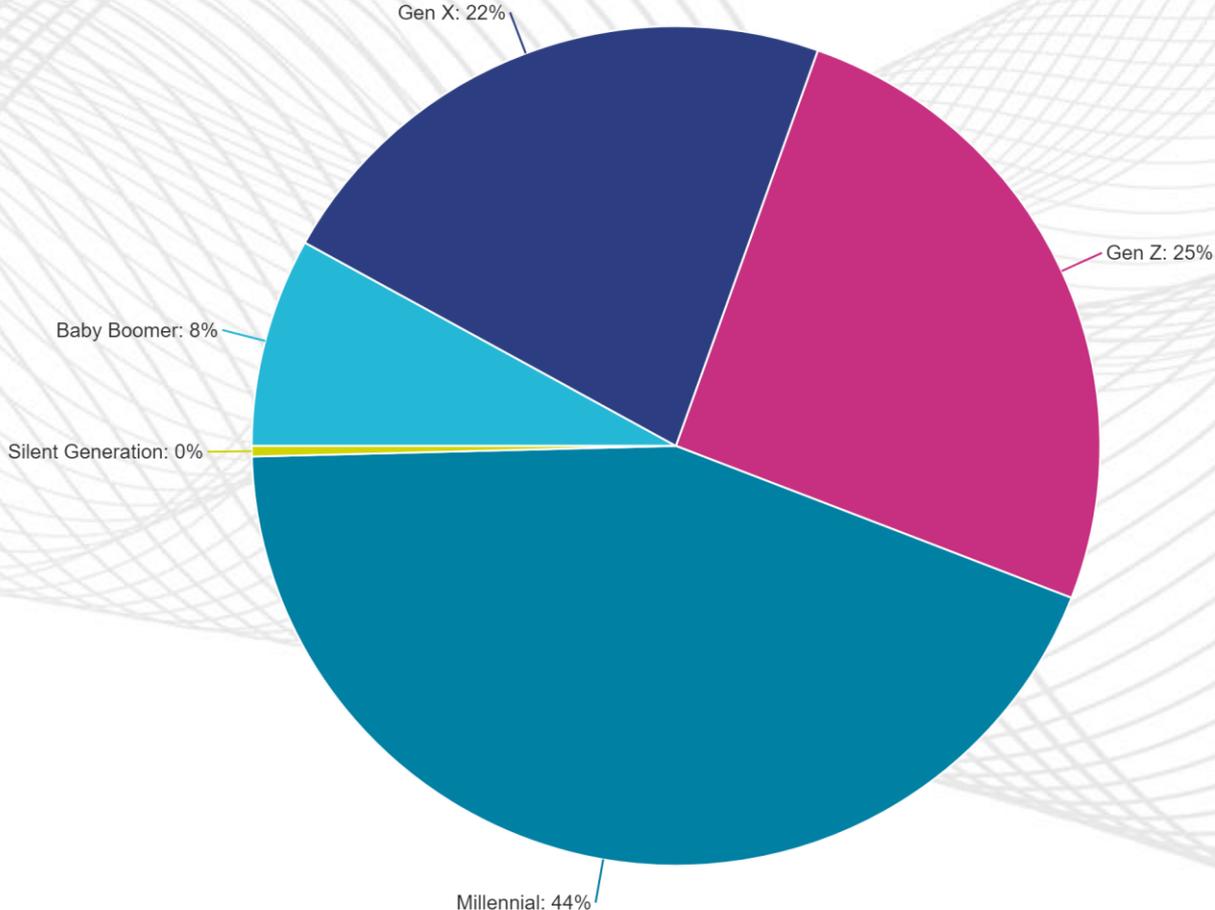
DEMOGRAPHIC BREAKDOWN

Sample Size by Country

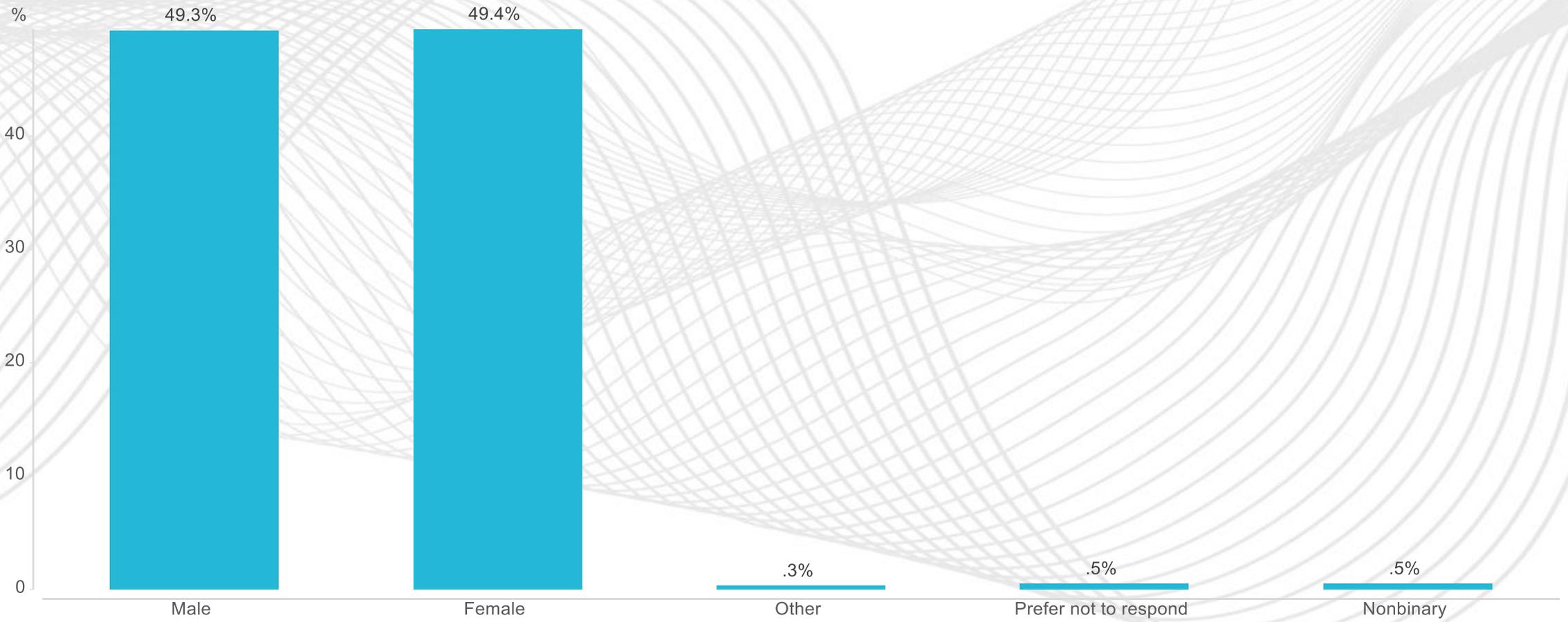


Country SUMMARY
sample size = 20069

Generation

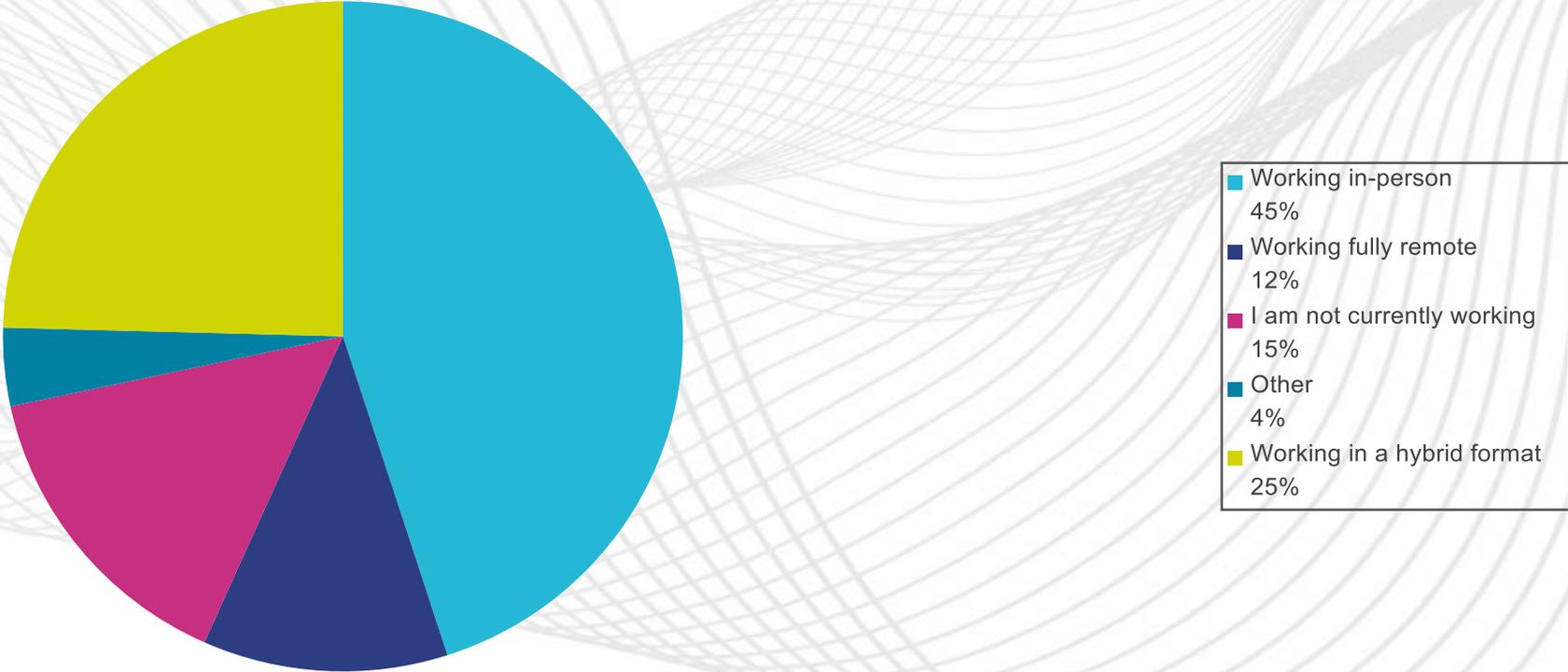


What is your gender?



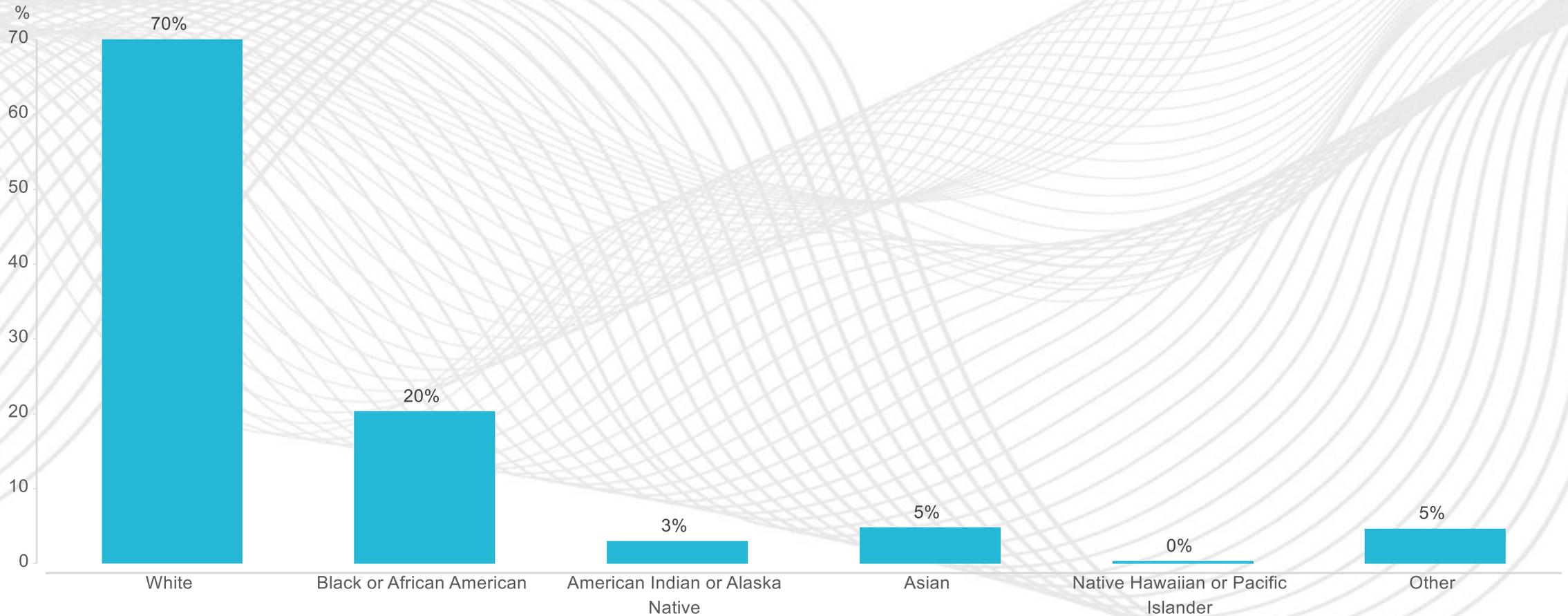
What is your gender? SUMMARY
sample size = 20069

What is your current work situation? - Selected Choice



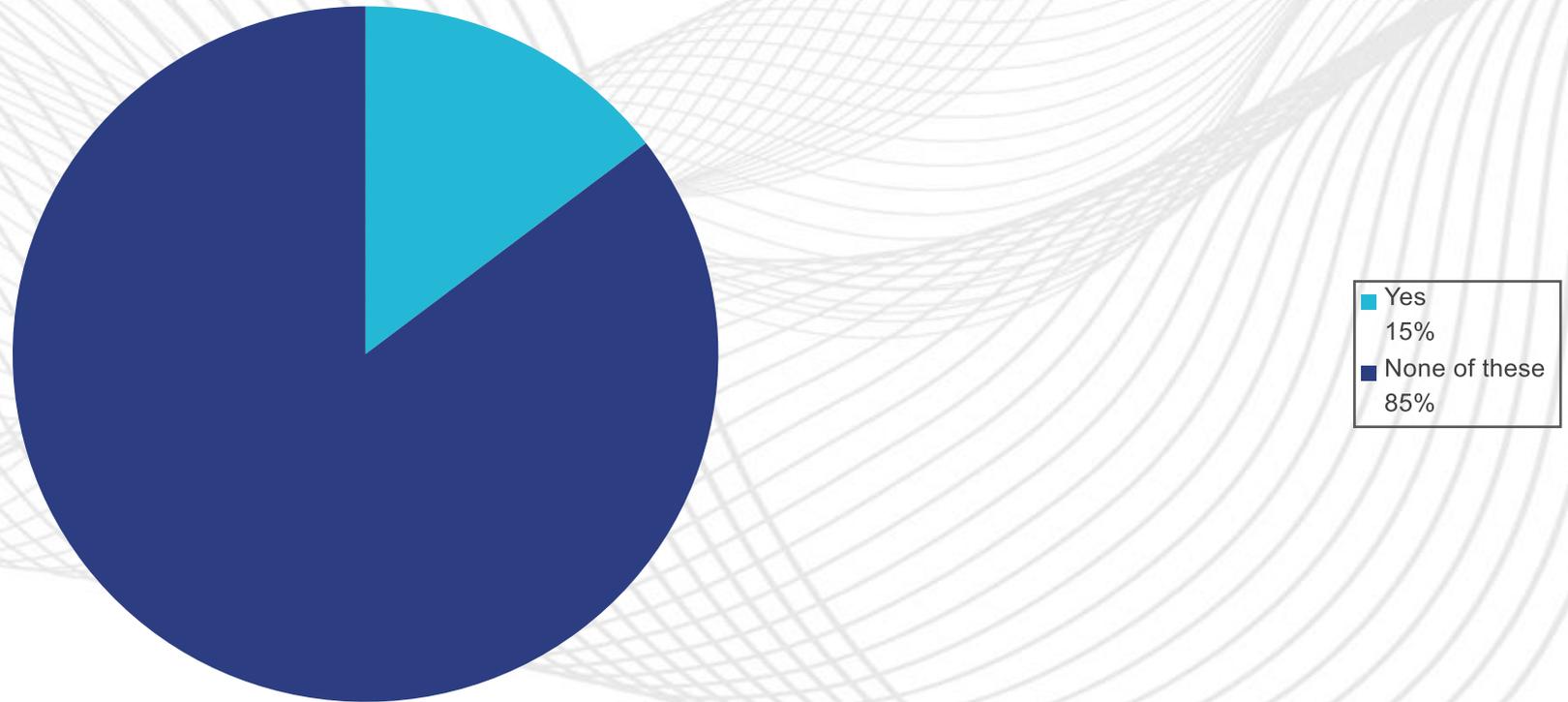
What is your current work situation? - Selected Choice SUMMARY
sample size = 20069

Which of the below most closely aligns with your race? (US Only)



Which of the below most closely aligns with your race? SUMMARY
sample size = 1005; total sample size = 20069; 19064 missing

Are you Spanish, Hispanic, or Latino or none of these? (US Only)



Are you Spanish, Hispanic, or Latino or none of these? SUMMARY
sample size = 1005; total sample size = 20069; 19064 missing



Thank you!