



dreemhealth
by sun*rise

The State of Sleep Health

Addressing Sleep Deprivation —
A hidden threat to American health and well-being.

2025 Edition

Executive Summary

While 97% of Americans recognize sleep's importance, the gap between awareness and quality rest represents a significant opportunity to improve national sleep health.

Sleep is fundamental to our physical health, mental well-being, and overall quality of life, yet it remains **one of the most overlooked aspects of healthcare**.

Just think about this: In the U.S., there's only one sleep doctor for every 43,000 people (AASM, 2024) — that's like everyone at Citi Field (where the Mets play in New York) relying on a single doctor for care.

This report, based on a comprehensive national survey conducted by Dreem Health in partnership with Wakefield Research, provides an in-depth analysis of sleep health in America today. The findings reveal a clear paradox: **while 97% of Americans recognize sleep's importance, more than half aren't getting enough quality rest.**

The consequences of poor sleep ripple through every aspect of life — from diminished workplace productivity and strained relationships to increased health risks and compromised mental wellness.

This report examines the factors disrupting Americans' sleep, explores who's most affected, analyzes how people are addressing their sleep challenges, and highlights the significant knowledge gaps surrounding sleep disorders, particularly sleep apnea.

By bringing these issues to light, we aim to **inspire meaningful change in how sleep health is approached, both individually and systemically.**



Research methodology

In partnership with Wakefield Research, an independent research organization, Dreem Health conducted a national survey with **1,000 Americans across diverse demographics**. The survey used a 15-question email questionnaire and followed Wakefield's rigorous methodology for statistical validity. The survey was conducted in February 2025, with results weighted to ensure national representation and a margin of error of ± 3.1 percentage points at a 95% confidence level.

About Dreem Health

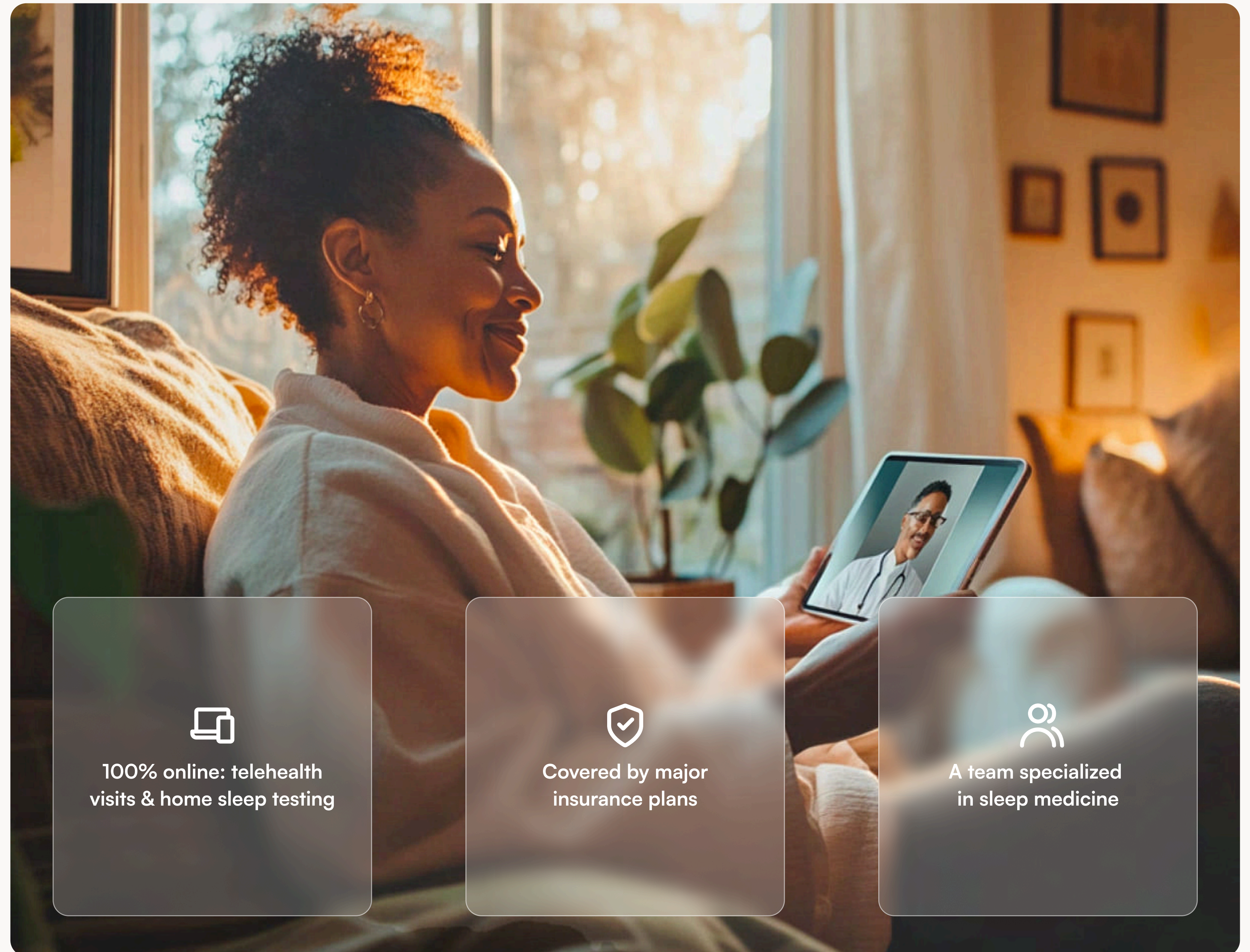
Transforming sleep health through
accessible, expert-led digital care.

Dreem Health is a **digital sleep clinic** dedicated to making high-quality sleep care more accessible and effective nationwide. Our approach combines **cutting-edge technology with expert-led care** to help people identify, understand, and treat their sleep disorders from the comfort of their own homes.

With sleep disorders affecting millions of Americans, Dreem Health bridges the gap between patients and professional sleep care. From home-based sleep testing to personalized treatment plans, we're **redefining how sleep health is diagnosed and treated.**

Dreem Health is managed by the **Sunrise Group**, a Belgium-based pioneer in sleep technology since 2015.

dreemhealth
by sunrise



100% online: telehealth
visits & home sleep testing



Covered by major
insurance plans



A team specialized
in sleep medicine

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Key findings

Exploring key insights on sleep health in America, revealing opportunities to raise awareness, improve well-being, and expand access to better sleep care.



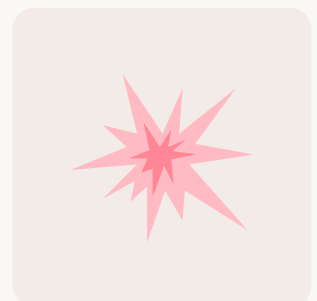
Americans value sleep but struggle to get enough

While **83%** of Americans consider sleep "extremely important" for overall health, only **7%** report waking up feeling well-rested every day.



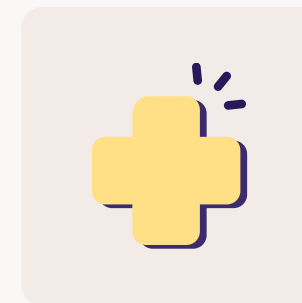
Stress and environment disrupt sleep for many

The main culprits disrupting sleep are stress and anxiety (**54%**), followed by environmental factors (**44%**), and snoring or breathing difficulties (**21%**).



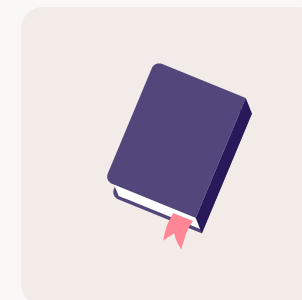
Poor sleep severely impacts daily life and well-being

41% report difficulty concentrating and reduced productivity, **40%** experience mood swings and irritability, and **31%** suffer from anxiety.



A need for more accessible sleep solutions

24% of respondents seek sleep solutions but don't know where to turn, revealing an opportunity to improve access to effective care.



Bridging the knowledge gap on sleep apnea

While **38%** understand sleep apnea and its risks, many are still unfamiliar: **21%** have heard of it but need more clarity, and **8%** are completely unaware.



Sleep health varies significantly across demographics

Women experience more sleep disruption than men, and younger generations as well as lower-income groups report higher rates of sleep issues.

Chapter

01

The Sleep Health Paradox

Americans recognize the importance of sleep — yet most still aren't getting enough. While 83% say sleep is essential for health, only 7% wake up feeling well-rested each day, and most fall short of the recommended 7-9 hours. This creates an opportunity to build a clearer path from awareness to effective care, ensuring more people get the right support to sleep better.



What we know, and what we do

Americans overwhelmingly recognize sleep's importance, but 77% of Americans get less than the recommended 7-9 hours needed for optimal health.

Sleep isn't just a wellness trend; it's a biological necessity. Our survey found that **97% of Americans consider sleep important for their health**, with 83% calling it *extremely important*. That's an encouraging starting point — people understand the value of rest. But knowing something matters doesn't always translate to action.

Despite recognizing sleep's importance, most Americans fall short of getting enough. **More than half report sleeping just 6—7 hours a night**, below the 7—9 hours recommended by the American Academy of Sleep Medicine (AASM, 2015).

Even more concerning, **23% get less than 6 hours**, a level the Centers for Disease Control and Prevention links to **increased risks of heart disease, obesity, and cognitive decline** (CDC, 2016).

But it's not just about duration — it's also about consistency. **More than a third (37%) have irregular sleep schedules**, shifting their bedtime by an hour or more each night. These fluctuations may seem minor, but even small shifts in sleep patterns can disrupt circadian rhythms.



Beyond hours, people are tired

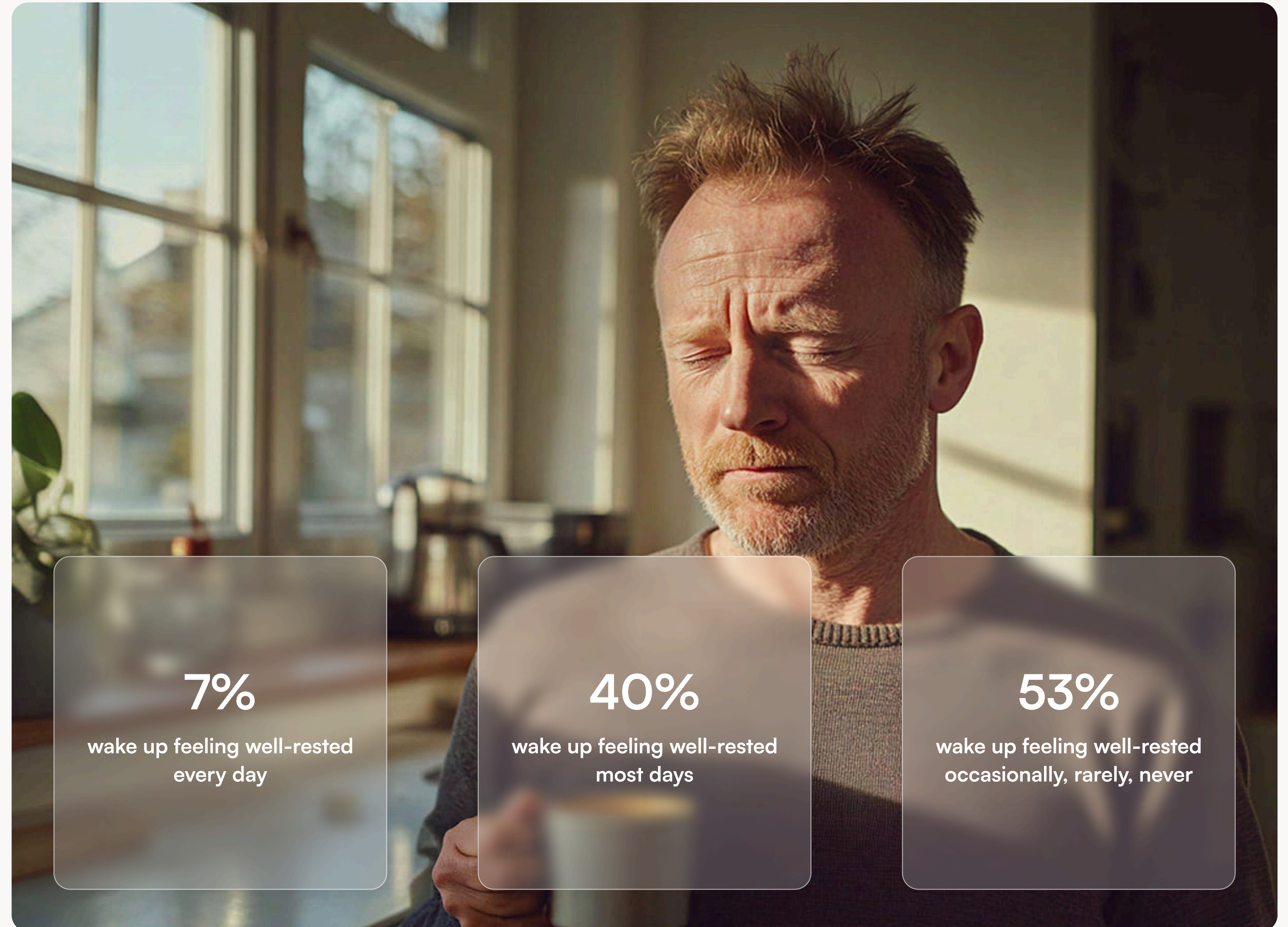
Most Americans start their day feeling unrested, highlighting the need for solutions that bridge the gap between sleep awareness and quality rest.

The real measure of sleep quality isn't just hours logged — it's **how people feel when they wake up**. And here's where the disconnect becomes striking:

- Only 7% of Americans feel well-rested every day.
- 40% feel well-rested most days.
- 53% feel well-rested only occasionally, rarely, or never.

This means **over half of Americans regularly start their day feeling tired and unrested** — despite most recognizing sleep as extremely important for their health.

This gap between understanding and experience represents both a public health challenge and a significant opportunity for effective sleep solutions.





A note from Dr. William Lu

Medical Director at Dreem Health



“

This data reflects what I see daily: **many people live with sleep issues for years**, assuming exhaustion is normal. Patients often say, “I thought being tired was just part of life.” This misconception delays care — when treatment can be life-changing.

Take a 42-year-old executive who dismissed her fatigue as “the cost of success.” Her undiagnosed sleep apnea led to hypertension and pre-diabetes. Three months of treatment later, **her blood pressure stabilized, and her glucose levels improved dramatically.**

The issue here is that sleep medicine is poorly understood, and patients don’t know where to turn. Break a leg, and you go to the hospital. Struggle with sleep, and most assume it’s just life — or worse, their fault. They don’t realize sleep issues often stem from real medical conditions with effective solutions.

Break a leg, and you go to the hospital. Struggle with sleep, and most assume it’s just life — or worse, their fault.

Take sleep testing. Many don’t know it exists, let alone that it can be done from home. Blood tests are routine, but sleep tests? Not yet. Patients picture an intimidating lab stay with months of wait time when, in reality, convenient home-based options are available.

Treatment has evolved too. Many still associate sleep apnea therapy with bulky, uncomfortable machines, but technology and support have come a long way. In our practice, **patients who receive continuous support in their first three weeks of PAP therapy are 70% more likely to stick with it.** That early guidance makes all the difference, and virtual care helps make it accessible.

The takeaway is clear: we don’t just need more awareness about sleep’s importance — **we need to shift the conversation.** Sleep disturbances aren’t just nuisances, they’re real medical conditions with serious consequences. More importantly, they’re treatable. **The challenge now is ensuring people know where to turn to reclaim their sleep.**

Chapter
02

The Sleep Health Divide

Not all sleep struggles are the same; some groups experience far more sleep disturbances than others. The survey data reveals clear gaps across gender, age, and income, showing that sleep health isn't just a personal issue — it's shaped by broader social and economic factors.



Women experience more sleep disturbances

Women report more sleep disturbances than men, with fewer waking up well-rested — highlighting a notable gender gap in sleep health.

Women report higher rates of sleep disruptions than men, with 41% of women compared to 34% of men experiencing significant sleep difficulties. This 7% difference represents millions of Americans who face gender-specific challenges to quality rest.

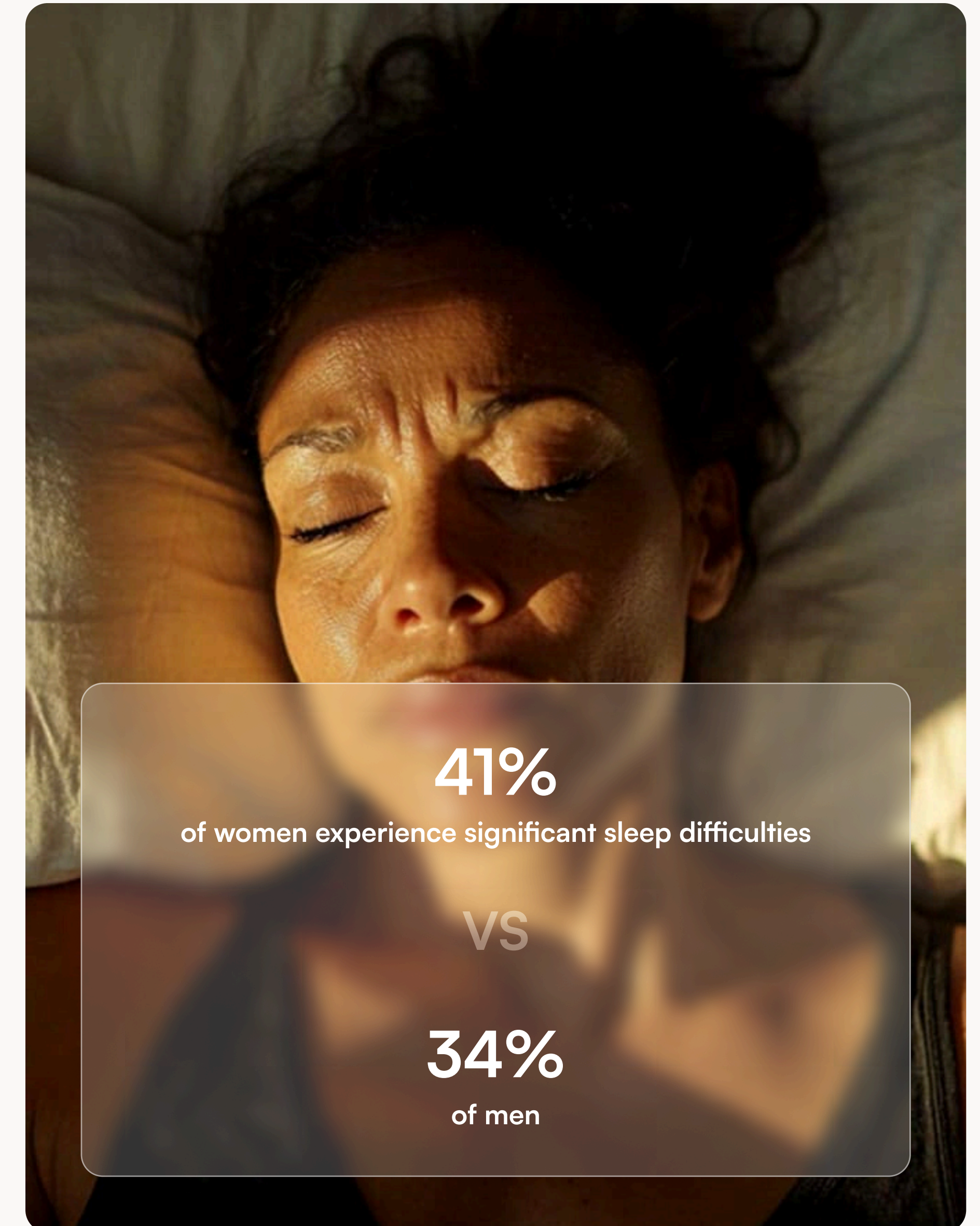
Multiple factors may contribute to this disparity, including hormonal fluctuations throughout the lifespan and higher reported stress levels. Women also appear to be **more affected by environmental sleep disruptors**, with 49% of women compared to 39% of men reporting disturbances from factors like noise, light, and temperature.

This gender gap widens further when caregiving responsibilities come into play. In a systematic review, Byun et al. (2016) found that up to **76% of caregivers reported poor sleep quality**, with female caregivers

being more affected than male caregivers. The survey supports this, showing that parents report significantly higher rates of sleep disruption (36%) compared to non-parents (4%), with women shouldering more of this burden.

These disruptions significantly affect women's daily well-being. According to the survey, **56% of women say they only occasionally, rarely, or never wake up feeling well-rested**, compared to 49% of men.

Addressing these gender disparities requires more than just acknowledging differences — it calls for **targeted interventions that consider the unique physiological, social, and environmental factors affecting women's sleep health**.



Younger generations have the most irregular sleep

Screen time and constantly connected lifestyles may contribute to poor sleep habits among Gen Z and Millennials.

Gen Z (1997-2012) and Millennials (1981-1996) struggle with inconsistent sleep schedules far more than older generations. The contrast is striking: while 74% of Boomers (1946-1964) maintain stable sleep routines, only 57% of Gen Z and 55% of Millennials do the same.

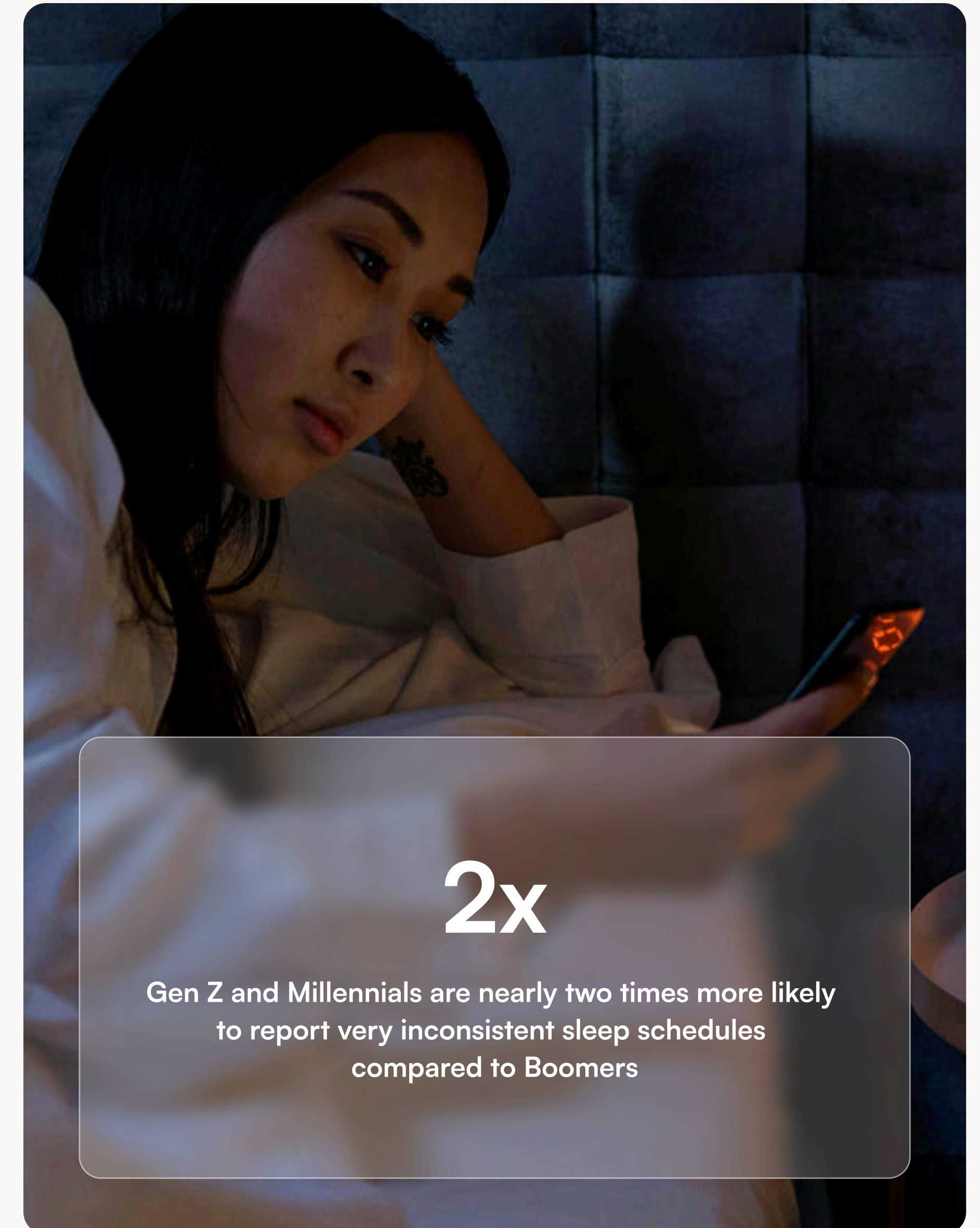
This suggests a generational shift in sleep patterns, with younger adults experiencing **more variability in their bedtimes and wake times**. The survey shows that Gen Z and Millennials are nearly 2 times more likely to report *very inconsistent* sleep schedules compared to Boomers, contributing to overall lower sleep quality.

Screen time may play a major role in sleep problems among younger adults. A recent survey found that 93% of Gen Z stay up later than planned due to social media (AASM, 2023). The physiological mechanism is

known: exposure to blue light from screens in the evening hours suppresses the body's natural production of melatonin, the hormone that signals to the body it's time for sleep.

These findings highlight how digital devices — especially for those who have **grown up with 24/7 access to screens** — are making it harder for young people to get the rest they need.

As these technologies become increasingly integrated into daily life, **addressing their impact on sleep quality becomes an important health consideration for younger generations.**



2x

Gen Z and Millennials are nearly two times more likely to report very inconsistent sleep schedules compared to Boomers

Lower-income individuals report higher rates of poor sleep

Socioeconomic status significantly impacts sleep quality, consistency, and overall rest.

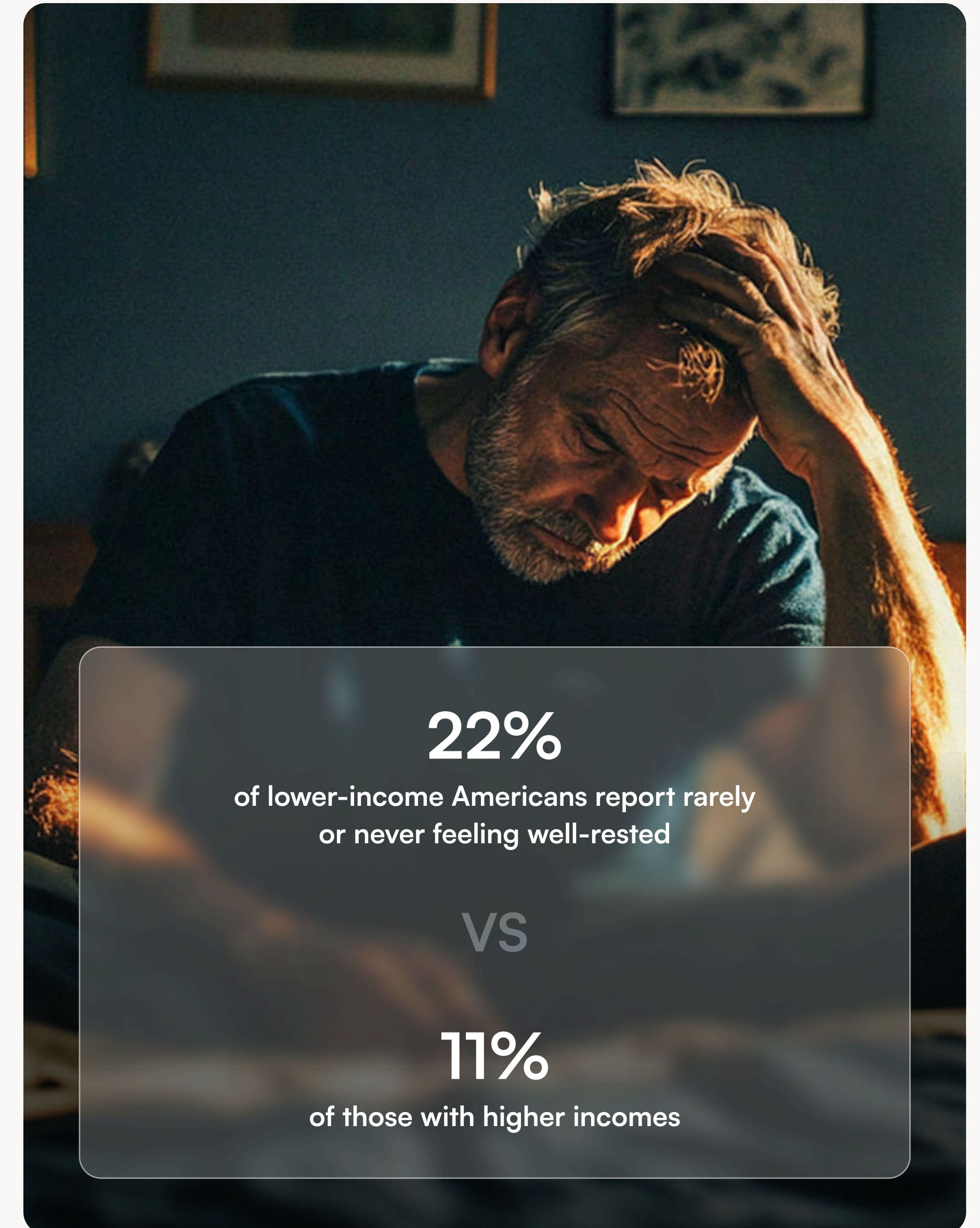
The survey data reveals significant socioeconomic disparities in sleep health. According to the survey results, Americans earning under \$50,000 per year report poorer sleep quality than those with higher incomes.

Specifically, **22% of lower-income Americans report rarely or never feeling well-rested, compared to just 11% of those with higher incomes.** This two-fold difference suggests that financial circumstances may play an important role in determining sleep quality.

Income-related sleep disparities also appear in sleep consistency, with 49% of lower-income individuals experiencing inconsistent sleep patterns versus 29% of those with higher incomes. **This gap highlights how socioeconomic status affects not just sleep quality but also the regularity of sleep routines.**

These findings highlight **how socioeconomic factors correlate with measurable differences in sleep quality and patterns.**

Financial stress, demanding work schedules, and limited healthcare access could potentially contribute to the higher rates of sleep disturbances we observed among lower-income Americans, though further research is needed to confirm these specific causes.



Chapter

03

What's Preventing Good Sleep?

Most Americans aren't getting the rest they need — but why? Our survey reveals several major sleep disruptors, with stress leading the way, followed by environmental factors as well as snoring and breathing difficulties that make quality rest difficult to achieve.



Stress and anxiety, the #1 sleep disruptor

Stress and anxiety are the leading causes of poor sleep for over half of Americans, especially impacting younger generations and parents.

More than half of Americans (54%) say stress and anxiety are their biggest barriers to good sleep. This makes mental strain the most common sleep disruptor, outranking environmental factors (44%) and physical issues like snoring or breathing difficulties (21%).

The problem is even worse for certain groups:

- Gen Z (69%) and Millennials (60%) experience more stress-related sleep disruption.
- Women (57%) are more likely than men (50%) to say anxiety keeps them up at night.
- Parents (63%) report more stress-related sleep loss than non-parents (51%).
- Employees (62%) face higher rates of stress-related sleep issues than non-employed (40%).

These numbers show just how closely mental health and sleep are connected.

Research from Harvard Medical School demonstrates sleep and mental health affect each other bidirectionally — poor sleep amplifies emotional reactivity while weakening cognitive control (the ability to manage unwanted or racing thoughts), which increases anxiety (Harvard Health, 2021). This creates a cycle where mental health problems cause sleep issues, and sleep problems worsen mental health, making it crucial to address both simultaneously.

The survey also reveals that those reporting stress as their primary sleep disruptor are more likely to experience daytime impacts: 48% report mood swings and irritability (compared to 32% of others) and 40% report increased anxiety during the day (compared to 22% of others), demonstrating how nighttime stress creates a 24-hour impact on wellbeing.

Primary factors disrupting American's sleep



54%
Stress or anxiety



44%
Environmental Disturbances
(noise, light, temperature, discomfort)



21%
Snoring or breathing difficulties



16%
Consumption of alcohol, caffeine, or digestive issues



16%
Caring for children or dependents

How environmental factors in the bedroom affect sleep quality

Environmental factors like noise, light, and temperature affect 44% of Americans' sleep, with certain groups (city residents, employees, parents) facing higher disruptions.

For 44% of Americans, environmental factors — such as noise, light, and temperature — interfere with their sleep. These modifiable factors represent a significant opportunity for sleep quality improvement through targeted interventions and education.

The data reveals notable patterns in how these disturbances affect different groups:

- **City residents** (48%) report more environmental sleep disruptions than those living in suburbs (43%) or rural areas (43%).
- **Employed Americans** experience more environmental sleep disturbances (48%) than those who are not employed (39%).
- **Parents** report significantly higher rates of sleep disruption (36%) compared to non-parents, where only 4% report similar issues.

The National Sleep Foundation's Bedroom Poll found compelling evidence that your sleep environment directly impacts sleep quality: **people who rated their bedroom environment as *excellent*** (comfortable, quiet, dark, and clean) **were 3.5 times more likely to report good sleep** than those who rated their sleep environment as *poor* (NSF, 2018).

These findings suggest that simple environmental modifications — like blackout curtains, white noise machines, comfortable bedding, and temperature regulation — could significantly improve sleep quality for millions of Americans.



Snoring and breathing issues: warning signs for sleep apnea

Snoring and breathing issues affect 21% of Americans, with higher rates in men and those with obesity, often signaling (un)diagnosed sleep apnea.

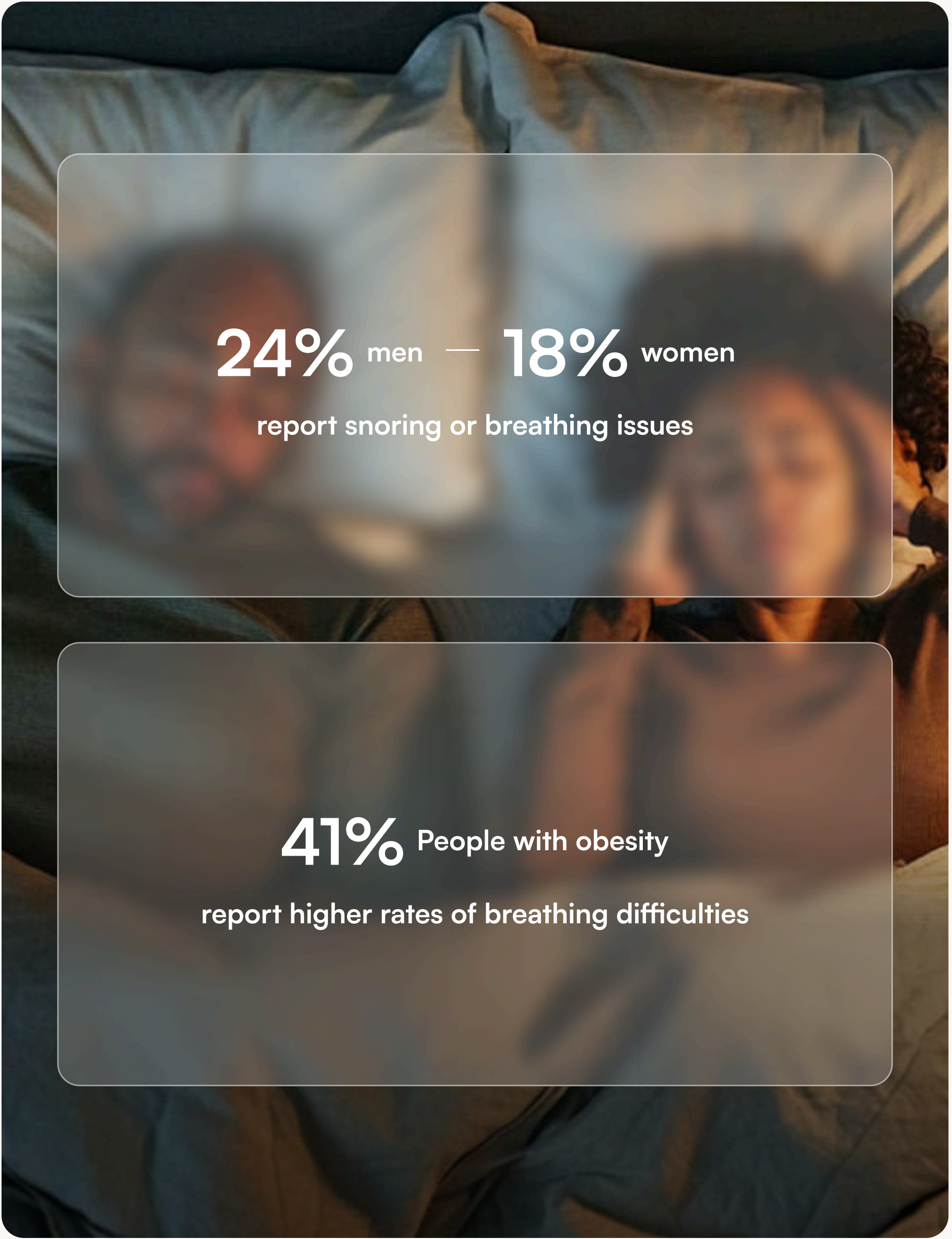
Snoring and breathing difficulties affect 21% of survey respondents, making them one of the most common sleep disruptors. However, some groups report these issues at different rates:

- **Men (24%)** are more likely than women (18%) to report snoring or breathing issues.
- **Gen X (26%, ages 45-60) and Millennials (25%, ages 29-44)** report.
- **People with obesity (41%)** report higher rates of breathing difficulties.

Interestingly, Boomers report fewer snoring and breathing issues, likely because more of them receive treatment — not because the problem is less common.

Our data shows Boomers have undergone more sleep studies (19% vs. 9% for Gen Z), report better understanding of sleep apnea (50% vs. 27% for Gen Z), and maintain more consistent sleep schedules — all factors that could reduce reported breathing disruptions.

Breathing difficulties often align with symptoms of sleep apnea, though formal diagnosis requires clinical evaluation. The American Sleep Apnea Association estimates that **80% of moderate and severe obstructive sleep apnea cases remain undiagnosed**, representing approximately 23 million Americans (AASM, 2023).



24% men — **18%** women
report snoring or breathing issues

41% People with obesity
report higher rates of breathing difficulties



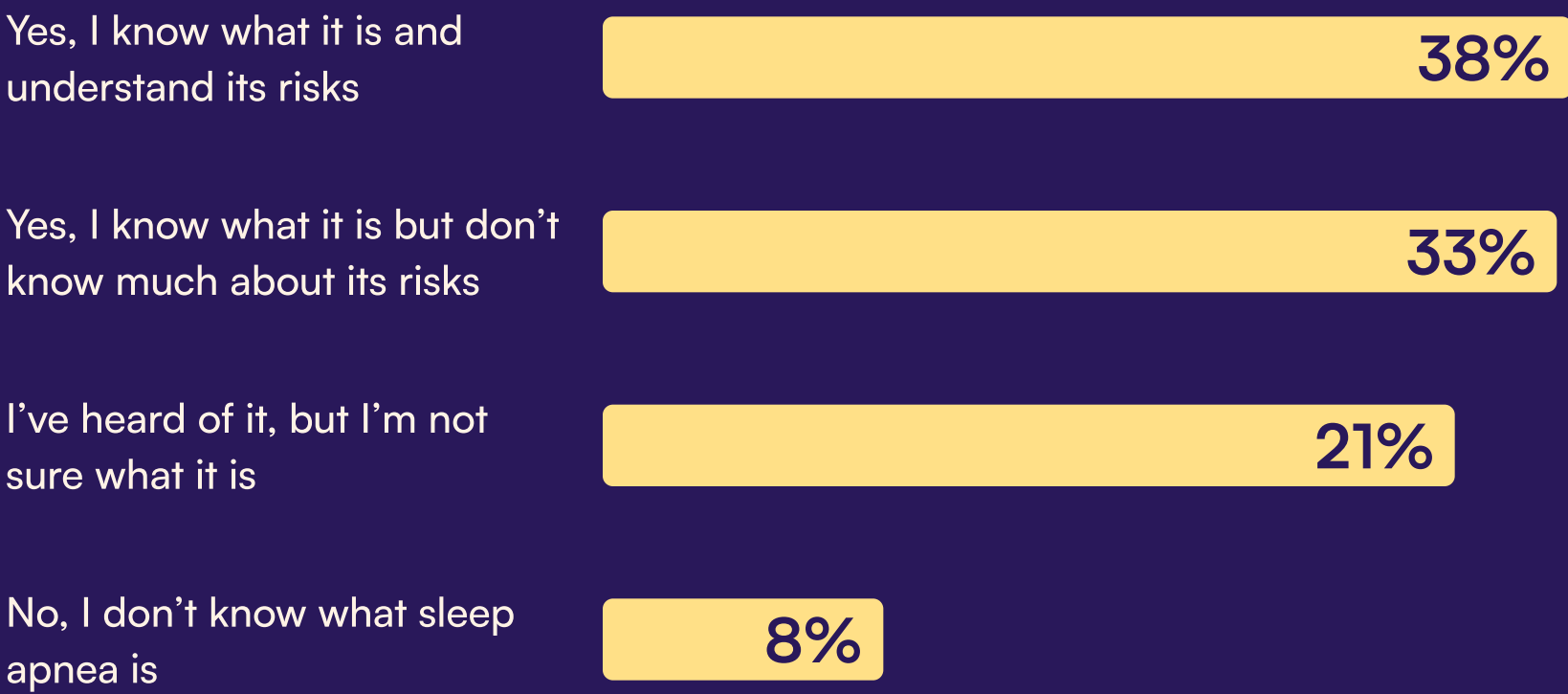
Zoom in on sleep apnea

Obstructive sleep apnea — a potentially serious disorder characterized by repeated breathing interruptions during sleep — affects an estimated 23 million Americans (AASM, 2023).

Understanding gaps in sleep apnea awareness

Despite its serious health impacts, knowledge about sleep apnea varies widely — especially among younger adults, those with lower education levels, and lower-income groups.

Knowledge about sleep apnea varies



These knowledge gaps are most pronounced among:

- Younger adults — 13% of Gen Z (ages 13-26) respondents don't know what sleep apnea is compared to 4% of Boomers (ages 60-78).
- Those with lower education levels — 10% of non-college graduates lack knowledge about sleep apnea versus 5% of college graduates.
- Lower-income respondents — Among lower-income respondents (under \$50,000), 13% have no knowledge of sleep apnea compared to 5% of those earning \$100,000+.

This awareness divide presents a **significant opportunity to improve public health outcomes through targeted education.**

Educational campaigns that specifically address the needs and communication preferences of these demographic groups could substantially improve public health outcomes — **raising awareness, improving timely diagnosis, and enhancing quality of life for affected individuals.**



Zoom in on sleep apnea

Sleep apnea treatment typically involves a Positive Airway Pressure (PAP) machine, which delivers air through a mask to keep airways open. It is the first-line treatment for moderate to severe sleep apnea.

A clear prevalence of comorbid conditions

Participants showed higher sleep apnea rates in men, and those with obesity, high blood pressure, and diabetes, consistent with research.

The survey reveals important patterns in sleep apnea prevalence:

- 19% of respondents report having been diagnosed with sleep apnea.
- Higher rates are reported among:
 - Men (21% vs. 17% for women).
 - Those with obesity (41%).
 - Those with high blood pressure (28%).
 - Those with diabetes (27%).

These patterns closely align with established risk factors for sleep apnea, particularly the connection between sleep apnea and associated comorbid conditions (high blood pressure, diabetes, and obesity).

Concerns and resistance to sleep apnea treatment

Comfort concerns, uncertainty about treatments, and a preference for natural remedies influence resistance to sleep apnea treatment.

Why some people hesitate to seek treatment



This breakdown highlights the challenges patients face around sleep apnea treatments, with comfort and personal preferences playing significant roles in treatment decision-making.

Chapter

04

The Cost of Poor Sleep

Poor sleep affects more than just energy levels — it disrupts focus, emotional balance, and physical health. Survey results highlights key consequences, from impaired productivity and increased stress to cravings and a weakened immune system, showing just how deeply sleep loss impacts daily life.



Sleep deprivation, a serious threat to performance and safety

Poor sleep impacts not just health but our focus, decision-making, and safety, with serious consequences for both well-being and the economy.

Poor sleep doesn't just leave you groggy — it directly impacts cognitive function, alertness, and decision-making. The survey reveals how sleep deprivation affects mental sharpness:

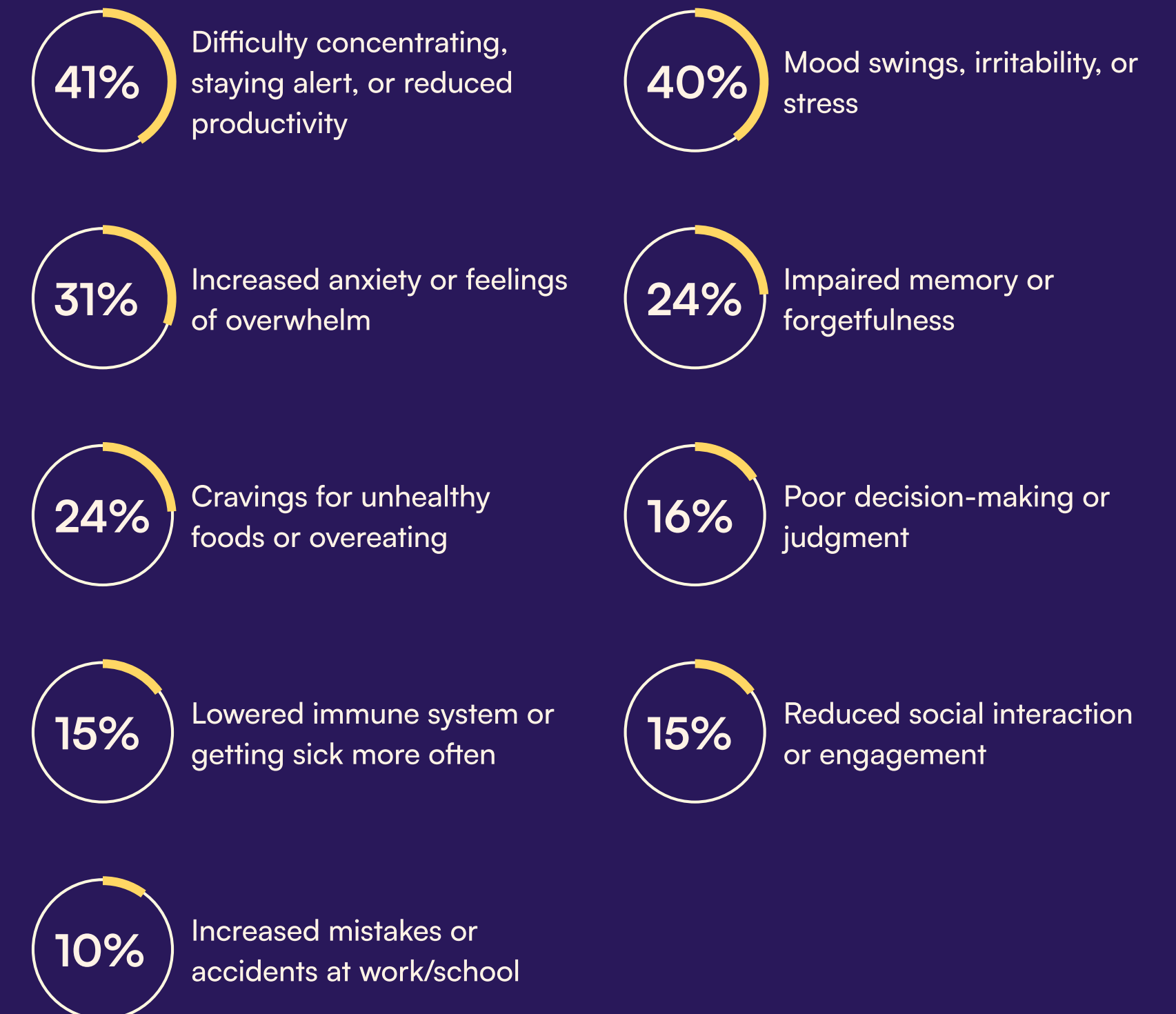
- 41% struggle with concentration, alertness, or productivity.
- 24% experience impaired memory or forgetfulness.
- 16% report making poor decisions from lack of sleep.
- 10% acknowledge making more mistakes or experiencing accidents at work or school.

These struggles add up. Research from the RAND Corporation estimates that **insufficient sleep costs the U.S. economy \$411 billion annually** — equivalent to 2.28% of GDP — due to lost productivity and increased mortality (Hafner et al., 2017).

Beyond work, **sleep deprivation is a major safety risk**. Each year, drowsy driving causes an estimated 91,000 crashes — **the equivalent of a major airline crash happening every day** — resulting in 50,000 injuries and nearly 800 deaths (NHTSA, 2017).

Studies even show that **being awake for 24 hours impairs reaction time as much as having a blood alcohol level over the legal limit** (Williamson & Feyer, 2000). In other words, losing sleep can be just as dangerous as driving drunk.

How poor sleep affects daily lives



The sleep-emotion connection: how poor rest fuels anxiety

Poor sleep intensifies stress, mood swings, and anxiety, with significant effects on emotional balance and well-being.

Sleep is essential for emotional balance. We all know that when we don't get enough, stress, anxiety, and mood swings intensify. The survey supports this:

- 40% experience mood swings, irritability, or increased stress due to poor sleep.
- 31% report heightened anxiety or feelings of overwhelm.

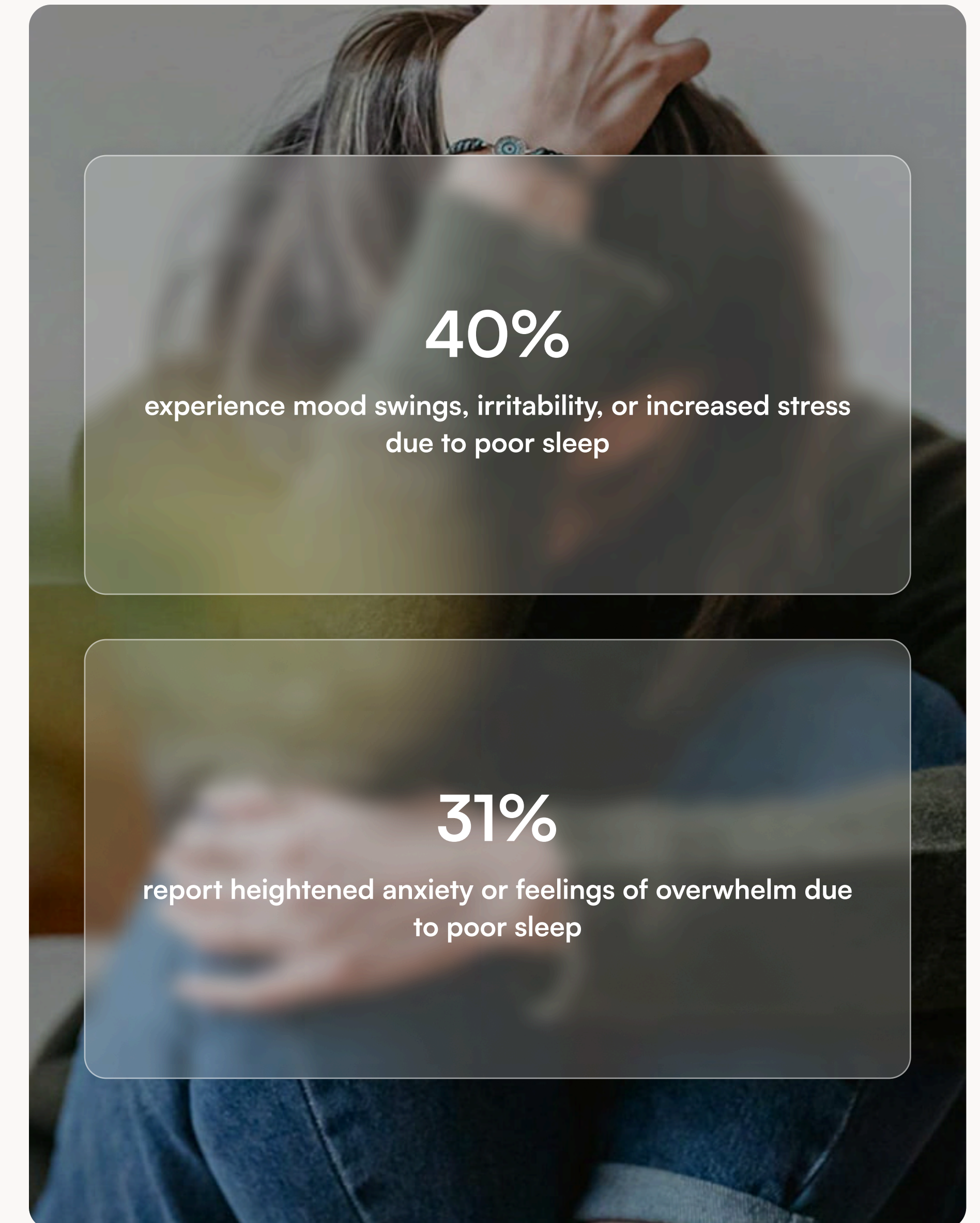
These survey findings are validated by neuroscience research. Studies from UC Berkeley demonstrate that sleep deprivation directly impacts the brain's emotional processing centers: **sleep-deprived individuals show a 30% increase in anxiety levels and a diminished ability to regulate emotions** (Simon et al., 2019).

“Sleep deprivation hits the emotional centers of our brain particularly hard. **Without sufficient REM sleep¹, our ability to read social situations, empathize with others, and regulate our own emotional responses is significantly impaired.**

— Professor Matthew Walker (2020)

This bidirectional relationship creates a dangerous cycle: poor sleep increases anxiety, while heightened anxiety makes it harder to sleep well. **Breaking this cycle often requires addressing both sleep quality and emotional health simultaneously.**

¹REM sleep (Rapid Eye Movement sleep) is a stage of sleep characterized by quick movement of the eyes, high brain activity, and vivid dreaming. It's essential for emotional regulation, memory consolidation, and learning.



How the body pays the price of poor sleep

Participants reported that poor sleep led to cravings and a weakened immune system, with serious long-term health consequences.

Poor sleep doesn't just affect the mind — it also **influences daily behaviors and physical health.**

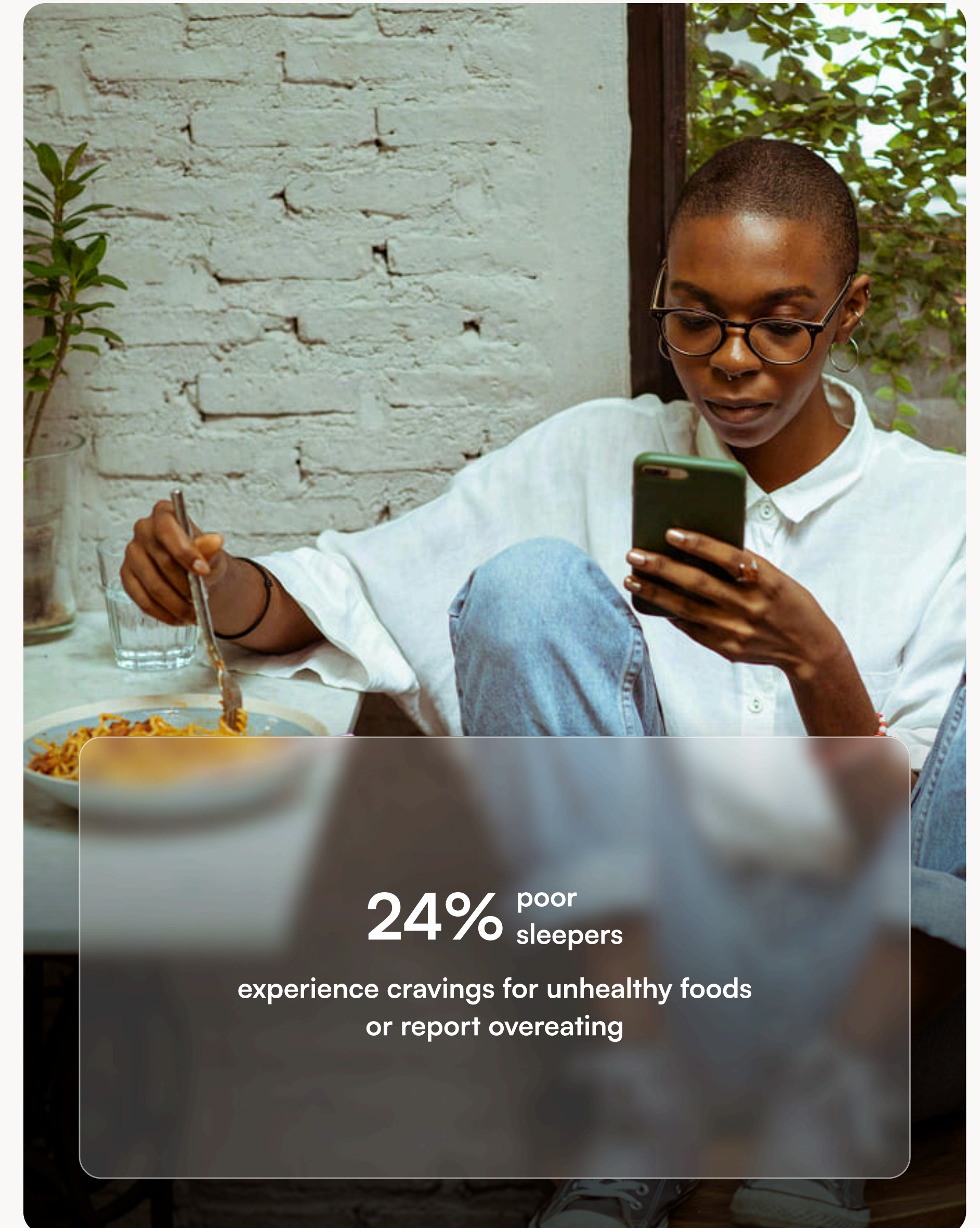
- 24% experience cravings for unhealthy foods or report overeating.
- 15% report feeling their immune system is weaker or that they get sick more often.

Science backs this up. Research found that **just one night of poor sleep can increase hunger hormones and reduce signals of fullness**, making overeating more likely (Tasali et al., 2009). This can contribute to weight gain and obesity, which already affects over 40% of U.S. adults (CDC, 2023). It also creates a vicious cycle — lack of sleep leads to cravings and overeating, while excess weight can further disrupt sleep, making it even harder to break the pattern.

What's more, research in Sleep found that people who sleep fewer than seven hours are **3 times more likely to develop a cold** when exposed to the rhinovirus than those who sleep eight hours or more (Prather et al., 2015). This happens because sleep supports immune function — without enough rest, the body makes fewer infection-fighting cells, making it easier to get sick.

The effects of poor sleep extend beyond cravings and immunity. Chronic sleep deprivation is linked to a **higher risk of diabetes, heart disease, and even a shorter lifespan** (Cappuccio et al., 2010).

Addressing sleep health isn't just about feeling rested — it's key to breaking unhealthy cycles and protecting long-term health.



24% poor sleepers

experience cravings for unhealthy foods or report overeating

Chapter

05

How People Are Addressing Sleep Issues

Americans are actively taking steps to improve their sleep through a variety of approaches — from lifestyle changes and sleep aids to tracking technology — while an opportunity exists to enhance these efforts with professional guidance for more effective, lasting sleep health solutions.



Many are taking sleep into their own hands

85% of Americans are trying to improve their sleep, yet more than half still wake up unrested, highlighting a gap between common lifestyle strategies and effective, medically-informed solutions.

Most Americans attempt to improve their sleep through behavioral changes and environmental adjustments, showing a growing awareness of sleep hygiene principles and their impact on overall health.

These widely-adopted approaches span multiple dimensions of sleep wellness:

- Improving sleep environment (34%)
- Using sleep aids (34%)
- Sticking to consistent sleep schedules (32%)
- Reducing screen time before bed (29%)
- Adjusting physical activity or dietary habits (28%)

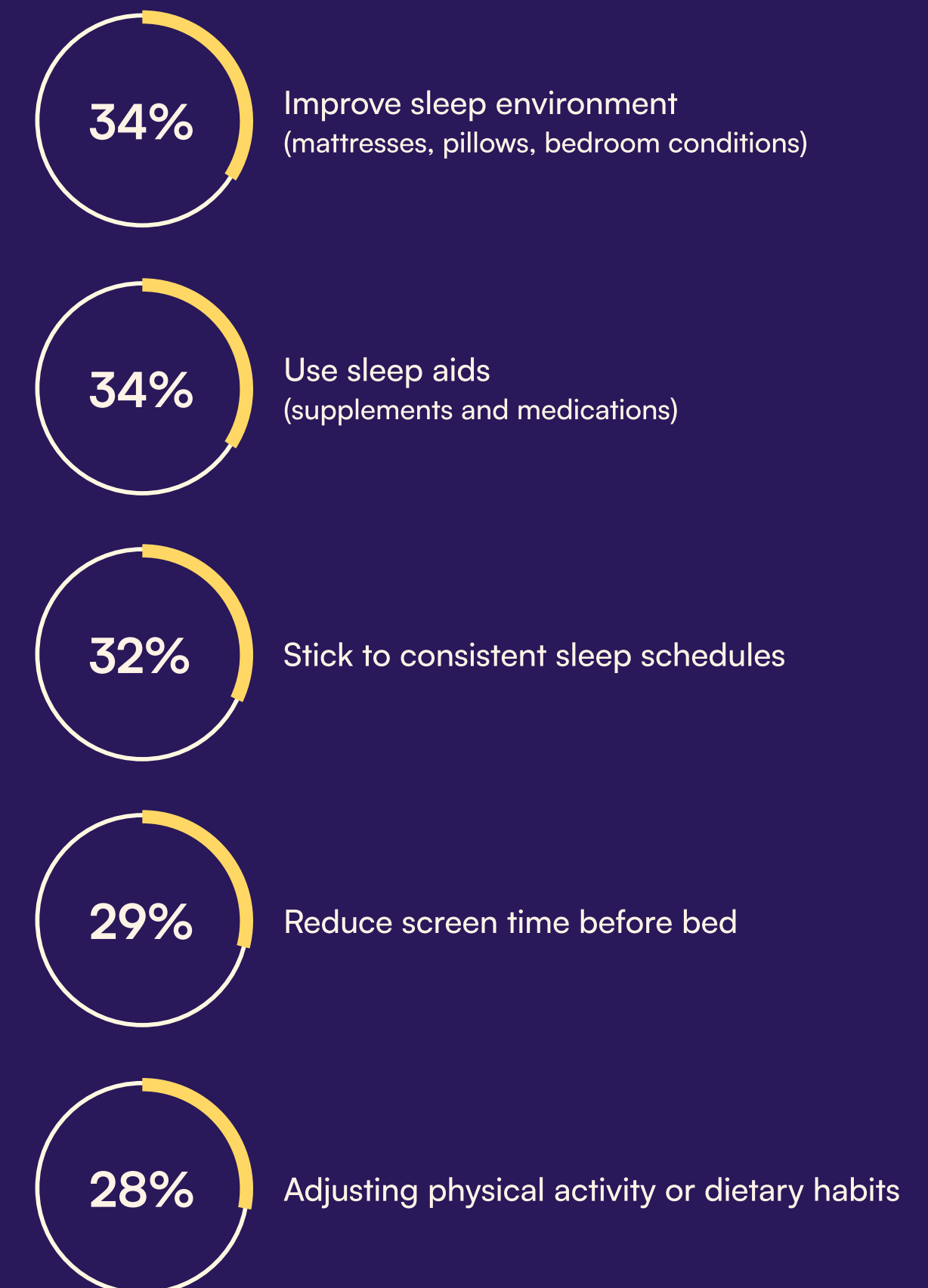
Yet despite these efforts, the survey reveals a troubling reality: **53% of Americans wake up feeling well-rested only occasionally, rarely, or never** — suggesting these self-directed strategies aren't delivering the results people need.

The disconnect between these widespread improvement efforts and continued poor sleep outcomes points to a **critical gap between conventional wisdom and effective solutions**.

In addition, 15% of Americans haven't tried any strategies at all, indicating a portion of the population isn't actively addressing their sleep challenges despite recognizing their importance.

This suggests an opportunity for more targeted, medical interventions that go beyond general sleep hygiene recommendations to address underlying sleep disorders and health conditions.

Strategies Americans use to improve their sleep



A significant opportunity for proactive care

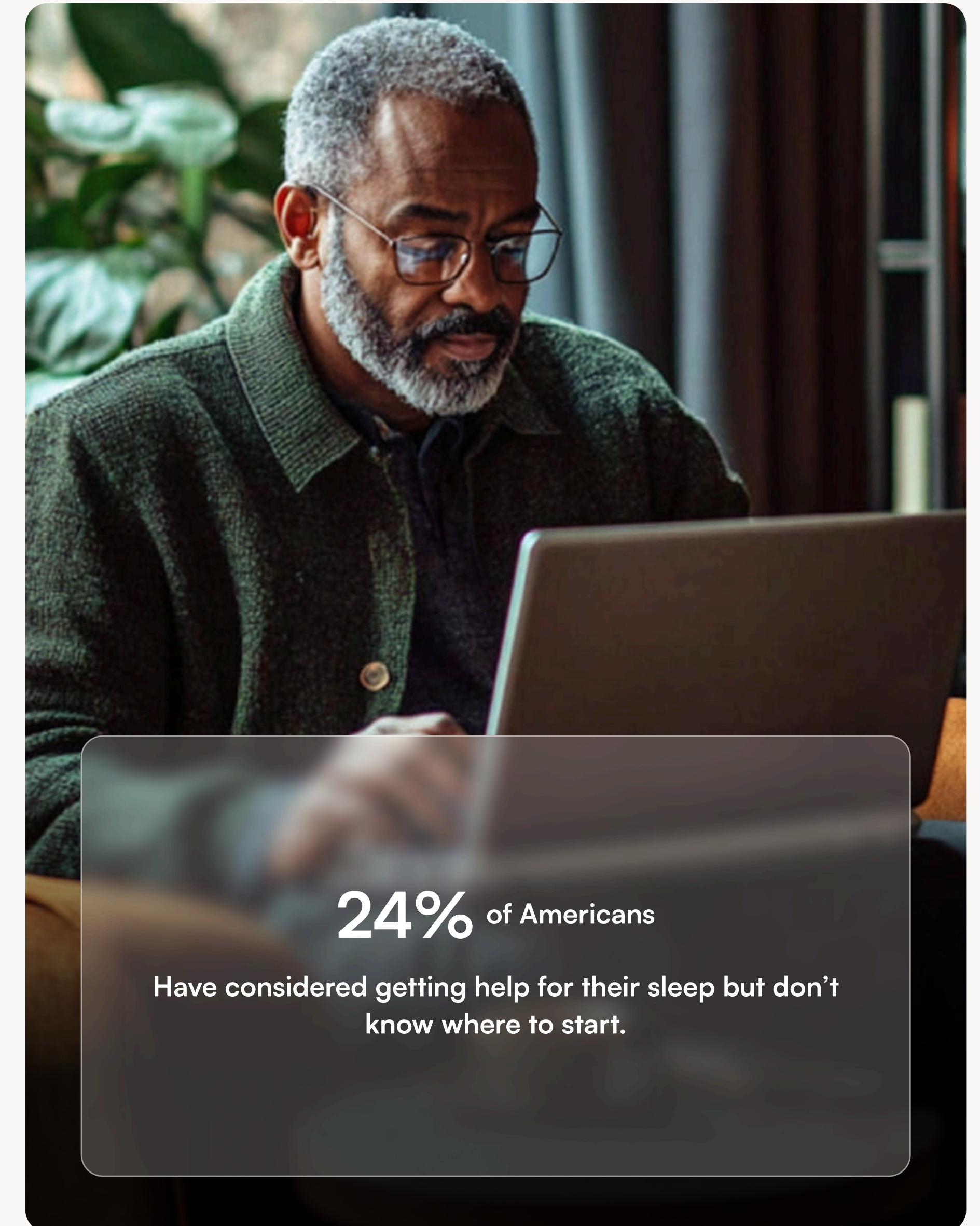
While many struggle with sleep issues, 24% don't know where to seek help, creating an opportunity for early intervention and increased awareness about professional care.

Despite widespread sleep difficulties, half of Americans (50%) don't believe they need medical assistance, and a quarter (24%) have considered seeking help but aren't sure where to start. Only 13% have consulted a doctor or sleep specialist, while another 13% rely on online resources or self-help methods.

This gap in seeking professional care presents a major opportunity for early intervention, education, and improved awareness. Whether due to a lack of understanding, limited awareness among primary care physicians, or hesitation to pursue sleep tests, there is a clear chance to educate and empower individuals.

According to the American Academy of Sleep Medicine, early intervention can significantly reduce health risks and improve quality of life (AASM, 2018).

How Americans seek help for their sleep problems



24% of Americans
Have considered getting help for their sleep but don't know where to start.

Increasing interest in sleep studies

The majority of Americans — 54% — have either completed or are considering a sleep study, reflecting a growing interest in professional sleep health evaluation.

Sleep study participation reveals interesting trends:

- 24% of all respondents have completed a sleep study (in lab or at home);
- 30% are considering a sleep study;
- 46% don't believe they need a sleep study.

While participation rates vary across demographics, with **younger generations and those experiencing sleep-related health issues more likely to participate**, the overall percentage suggests a growing openness to professionally investigating sleep patterns.

This shift toward medical evaluation indicates **increasing awareness of sleep's impact on overall health and recognition that certain sleep problems require clinical diagnosis**.

However, the gap between those considering sleep studies (30%) and those having completed them (24%) still suggests **opportunities to improve diagnosis pathways**. This 6% gap represents millions of Americans who recognize they might benefit from professional evaluation but face barriers to follow-through. Common obstacles may include uncertainty about the process, concerns about insurance coverage, or even limited access to sleep specialists.

The increasing interest in sleep studies also coincides with **technological advances making testing more accessible**. Home sleep tests now offer a convenient alternative to traditional in-lab studies, potentially expanding access for the 24% of Americans who report they're "not confident" or "unsure where to start" when seeking solutions for their sleep problems.

24%

of all respondents have completed a sleep study

30%

of all respondents are considering a sleep study

Reliance on sleep aids is common but risky

35% of Americans use sleep aids, with higher usage among women and Millennials — despite medical warnings about their limitations as a long-term solution.

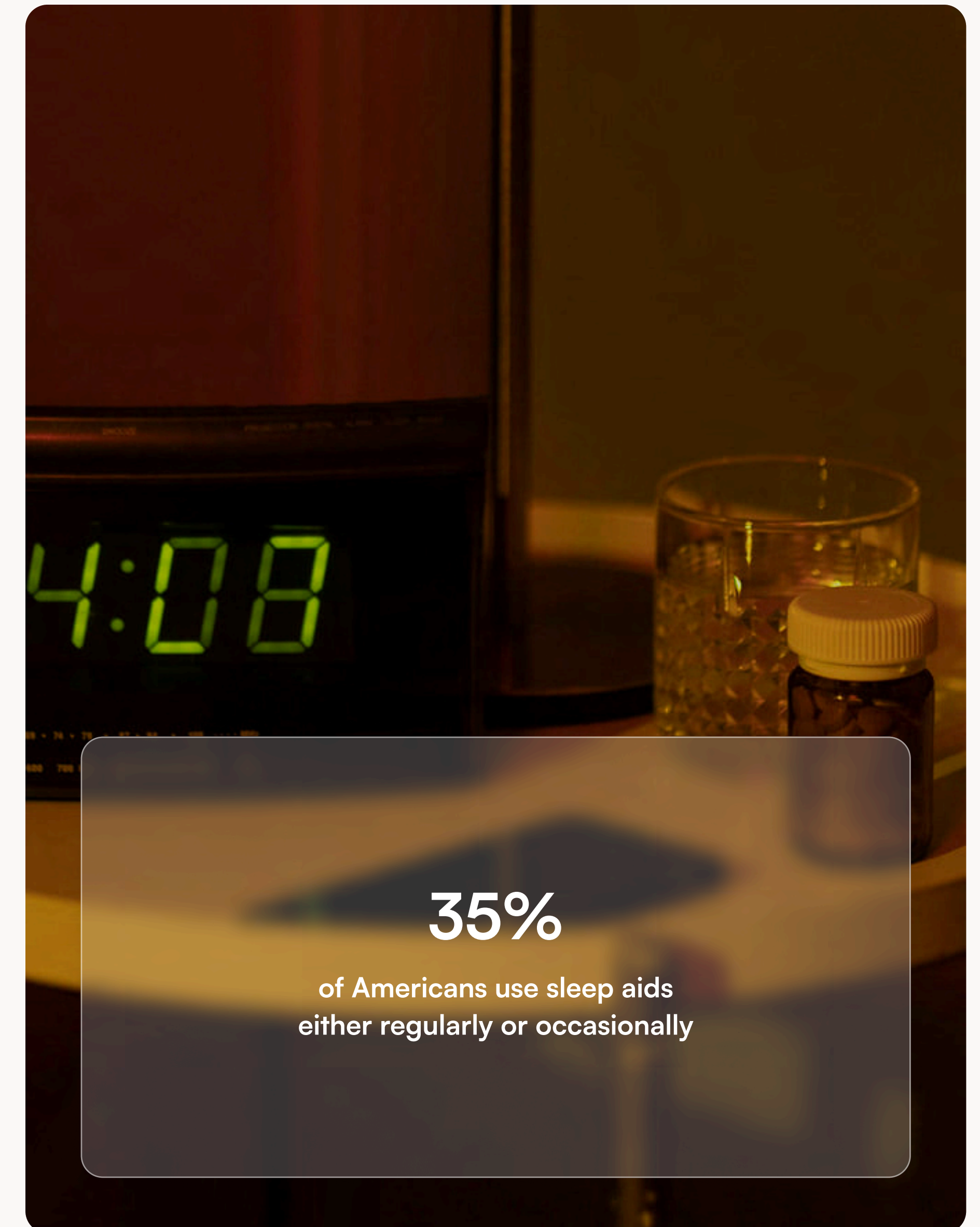
For some, sleep struggles lead to medication or supplements. Our survey found:

- **35% of Americans use sleep aids** either regularly (13%) or occasionally (22%);
- **Women (39%) use sleep aids more frequently** than men (31%);
- **Usage rates are higher among Millennials (43%)** compared to Baby Boomers (28%);
- **Urban residents (40%) report higher usage** than those in rural areas (36%).

While sleep aids can provide temporary relief, the American Academy of Sleep Medicine warns that they **should not be relied upon as a long-term solution without addressing the underlying sleep issues** (AASM, 2017). This highlights the importance of consulting with a sleep doctor who can help identify and treat the root causes of sleep difficulties.

Self-medicating with sleep aids may mask the problem but won't solve it — only a professional can provide a comprehensive treatment plan that supports long-term health and quality sleep. Many sleep aids also carry **risks of dependency, tolerance, and side effects that can further complicate sleep problems over time**. Despite these drawbacks, only 13% of Americans have sought help from a doctor or sleep specialist, suggesting many are attempting to manage significant sleep disorders without proper medical guidance.

For those experiencing chronic sleep issues, a more sustainable approach would combine appropriate short-term use of sleep aids (when recommended by a healthcare provider) with **targeted interventions that address underlying conditions like sleep apnea, insomnia, or circadian rhythm disorders**.



Sleep tracking raises awareness but doesn't guarantee better sleep

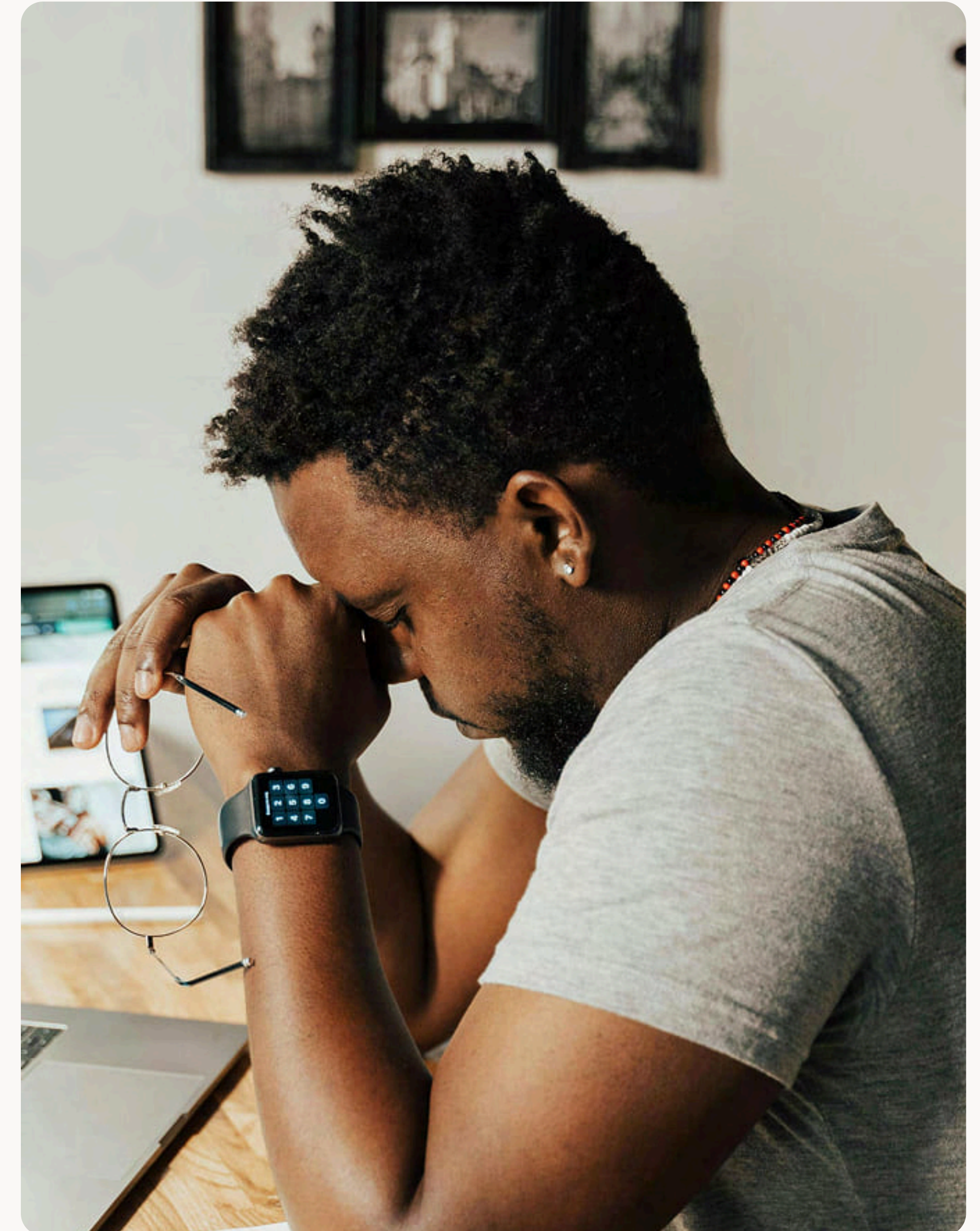
Many Americans — 29% — use sleep tracking, but pairing it with expert guidance is essential for lasting improvements in sleep.

Technology is increasingly important in sleep monitoring, with 29% of Americans using apps or wearable devices to track their sleep. **Adoption follows clear generational trends** — 37% of Gen Z and 36% of Millennials track their sleep compared to just 16% of Baby Boomers. Another 34% express interest but haven't yet tried these technologies, representing a significant potential market for sleep technology solutions.

However, research suggests that while tracking can increase awareness, it may not lead to improved sleep without appropriate interventions. In fact, excessive focus on sleep data can sometimes create "orthosomnia" — **anxiety about achieving perfect sleep that paradoxically makes sleep more difficult** (Baron et al., 2017).

The limitations of consumer sleep tracking technology also present challenges — the majority of devices cannot accurately detect sleep disorders with the precision of medical-grade equipment.

Tracking alone isn't enough — true sleep improvement comes from pairing technology with expert guidance. **A sleep specialist can help interpret the data, address underlying issues, and create an effective plan for lasting results.** By combining the convenience of home monitoring with professional expertise, sleep technology can become a powerful tool for improving sleep health rather than just another source of health data.



Chapter

06

Closing the Gap: From Awareness to Action

Understanding sleep's importance is a good first step, but awareness alone won't solve the problem. Sleep health needs to be prioritized like any other pillar of well-being, with evidence-based solutions that go beyond personal habit changes.



Bridging the sleep health divide

Making sleep education and care more accessible to all, regardless of gender, age, or income.

The sleep health divide isn't just about individual choices — it's shaped by gender roles, economic status, and generational habits. **Closing this gap means making sleep education and care more accessible**, so everyone — regardless of gender, age, or income — has the opportunity to achieve better sleep. Because sleep isn't just about feeling rested, it's about long-term health, well-being, and quality of life.

But ensuring better sleep health isn't just the responsibility of individuals. Public and private institutions, from healthcare systems to insurers and employers, must also make sleep care a priority. Investing in sleep health not only improves individual well-being but also strengthens society — boosting productivity, reducing healthcare costs, and fostering healthier communities.



A note from Laurent Martinot

CEO and Co-founder of Sunrise³



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When we started Sunrise, our mission was clear: to **close the gap in sleep care**. Sleep is just as essential as nutrition and exercise, yet it has been overlooked for too long — leaving millions with undiagnosed sleep disorders and serious health consequences.

The good news? **Awareness is growing, and sleep technology has advanced tremendously**. Devices like the Apple Watch, Samsung Galaxy, and Oura Ring track sleep stages, while smart mattresses monitor movement and breathing patterns. We now have more sleep data than ever.

But here’s the challenge: despite all this information, sleep quality isn’t improving. Why? Because technology alone isn’t enough. A sleep tracker flagging poor sleep — or even a sleep study — won’t drive change on its own. **Real progress happens when technology connects with care**.

That’s what we’re doing with Dreem Health: **combining Sunrise’s proprietary technology with a leading care team to create a seamless path to better sleep**.

*Technology alone isn’t enough.
Real progress happens when
technology connects with care.*

But we can’t do this alone. **Sleep care is a shared responsibility**. Healthcare providers should integrate sleep into routine care. Insurers need to recognize that treating sleep disorders reduces long-term healthcare costs. We encourage companies like Samsung, Oura, and Apple to go beyond providing sleep data — partnering with care providers to guide individuals toward real solutions. Employers should also recognize that well-rested employees are more productive and creative. And people everywhere need to stop seeing quality sleep as a luxury — it’s a necessity.

The sleep revolution has begun, and we’re committed to leading the way. Together, we can build a world where everyone gets the sleep care they need. Because when we sleep better, we live better.

A call to action: making sleep health a priority

It's essential to prioritize sleep health through public awareness, improved medical education, expanded access to care, and stronger workplace policies.

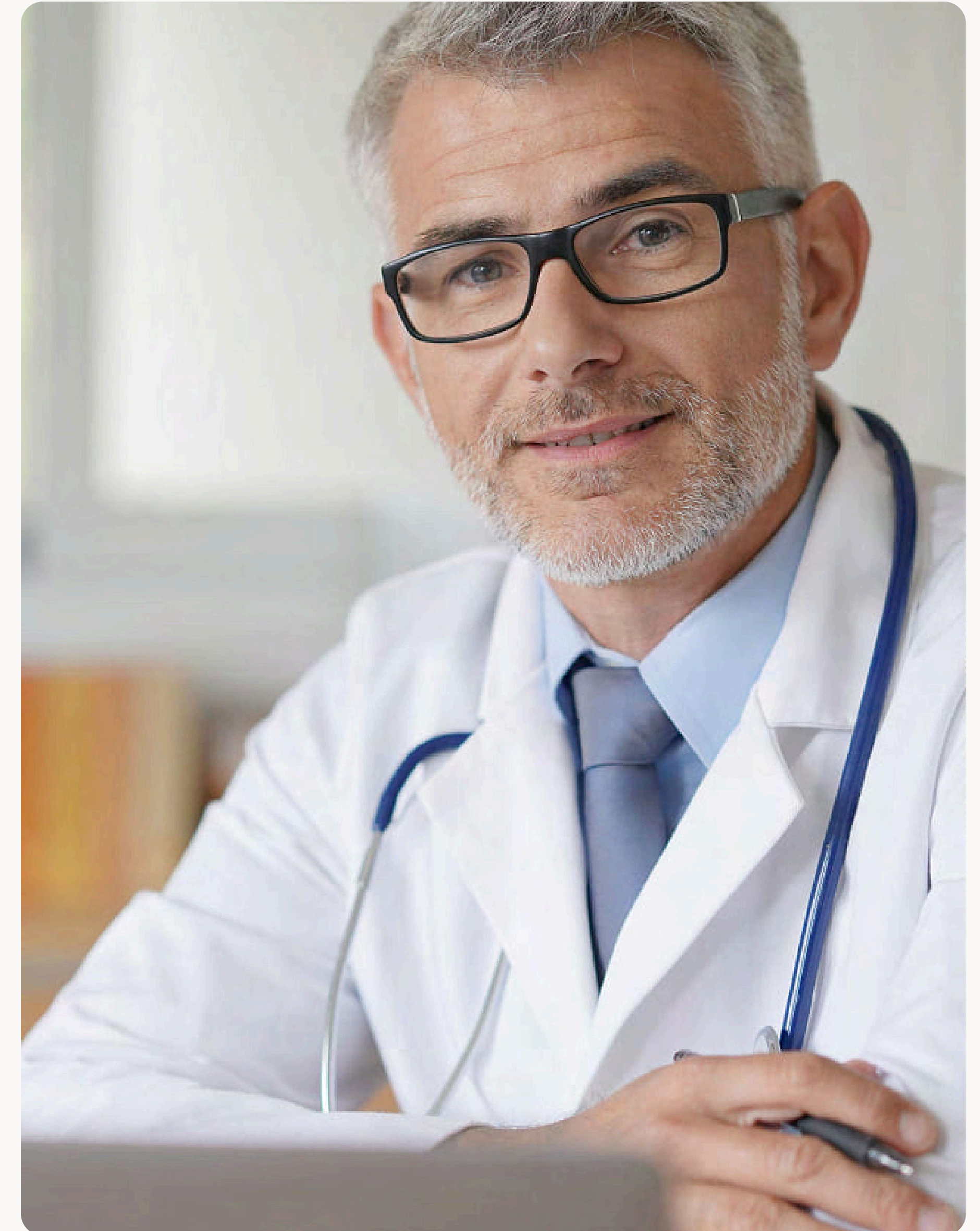
Only 13% of Americans say they experience no sleep disruptions — meaning that the vast majority struggle with at least one factor preventing good sleep. Whether it's stress, environmental issues, or physical conditions, sleep quality is under pressure from multiple angles — making consistent, high-quality rest harder to achieve for most Americans.

Improving America's sleep health requires action on multiple fronts:

- 1 **Expanding public awareness** so individuals recognize the signs of sleep disorders and understand their impact on long-term health.
- 2 **Improving medical education** to ensure healthcare providers are trained to diagnose and treat sleep disorders more effectively.
- 3 **Increasing access to care** by making sleep specialists, testing, and treatments more widely available.

- 4 **Advancing treatment options** to develop innovative, accessible solutions that address common sleep barriers.
- 5 **Integrating sleep into primary care** so doctors routinely assess sleep health as part of standard checkups.
- 6 **Strengthening workplace policies** that promote healthy sleep habits and recognize the role of rest in employee well-being.

Making sleep health a national priority isn't just about individual well-being — it's about creating a healthier, more productive society.





Conclusion

By improving access to care and raising awareness, we can remove the barriers preventing many Americans from getting the quality rest they need.

The research reveals a **nation that values sleep but struggles to achieve it**. From stress and environmental disruptions to knowledge gaps and limited access to care, the obstacles are real—and the consequences go far beyond morning fatigue. Poor sleep affects mental health, physical well-being, and overall quality of life.

Yet, **there's reason for optimism**. Many are actively taking steps to improve their sleep—adjusting habits, optimizing their environment, and using tracking technology. This proactive mindset shows a clear willingness to prioritize sleep when the right tools are available. **But medical support remains critically underused, leaving too many to navigate sleep issues alone** — often without realizing that professional care could make all the difference. Without clear guidance and accessible solutions, sleep issues go unaddressed, and the cycle continues.

At Dreem Health, we're changing that. Our digital sleep clinic removes barriers to care by combining expert medical support with innovative technology, making **high-quality sleep care easier to access than ever**. By turning awareness into action, we help Americans move beyond trial and error to real, lasting solutions.

Better sleep begins with better information and easier access to care. We hope this report contributes to both goals, sparking important conversations about sleep health and inspiring meaningful changes in how we approach sleep.

The logo for Dreem Health, featuring the company name in a stylized, cursive script font. The 'D' is large and loops around the 'ream', and 'Health' is written in a similar flowing style.



Struggling with sleep?

Start with a home sleep test.

If sleep is affecting your health and life, don't figure it out alone. Our specialists will guide you toward better sleep with telehealth appointments and simple home sleep testing options.

Book Appointment 

Have patients struggling with sleep or want to partner? **Let's talk.**

If you're a healthcare provider or organization looking to improve sleep health, reach out to our team at hello@dreemhealth.com
To learn more about Dreem Health, visit dreemhealth.com

Appendice

Survey Questions

The following questions were used in the Dreem Health Sleep Survey, conducted by Wakefield Research in February 2025:

1-How important do you think sleep is for overall health?

- Extremely important
- Somewhat important
- Not too important
- Not important at all

2-On average, how many hours of sleep do you get per night?

- Less than 4 hours
- 4-5 hours
- 6-7 hours
- 8-9 hours
- More than 9 hours

3-How consistent is your sleep schedule during the week (bedtime and wake-up time)?

- Very consistent (same time every day)
- Somewhat consistent (within 30-60 minutes)
- Inconsistent (varies by 1-2 hours)
- Very inconsistent (varies by more than 2 hours)

4-How often do you wake up feeling well-rested?

- Every day
- Most days
- Occasionally
- Rarely or never

5-What factors most frequently disrupt your sleep?

- Stress or anxiety
- Disturbances such as noise, light, temperature, or discomfort
- Snoring or breathing difficulties
- Consumption of alcohol, caffeine, or digestive issues
- Caring for children or dependents
- Other
- I do not experience any disruptions during my sleep

6-How does poor sleep affect your daily life? (Select up to 3)

- Difficulty concentrating, staying alert, or reduced productivity
- Mood swings, irritability, or stress
- Increased anxiety or feelings of overwhelm
- Cravings for unhealthy foods or overeating
- Impaired memory or forgetfulness
- Poor decision-making or judgment
- Reduced social interaction or engagement
- Lowered immune system or getting sick more often
- Increased mistakes or accidents at work/school
- Poor sleep does not affect my daily life

7-Do you take any sleep aids (prescription or over-the-counter)?

- Yes, regularly
- Yes, occasionally
- No, but I have in the past and found them helpful
- No, but I have in the past and did not find them helpful
- No, never

8-Have you ever sought professional help for sleep problems?

- Yes, from a doctor or sleep specialist
- Yes, but only through online resources or self-help methods
- No, but I've thought about it and am unsure where to go
- No, I haven't felt the need

9-Have you ever undergone a sleep study (a medical diagnostic test prescribed by a doctor to evaluate for sleep related medical conditions)?

- Yes, at a sleep clinic or hospital
- Yes, at home through a home sleep test
- No, but I am considering it
- No, and I don't think I need one

10-Do you track your sleep using a device or app?

- Yes, regularly
- Yes, occasionally
- No, but I'm interested in trying
- No, and I'm not interested

11-How confident are you that you could find the right solution for your sleep problems if you wanted to?

- Very confident, I know where to look
- Somewhat confident, but I would need guidance
- Not confident, I'm unsure where to start
- I don't believe a solution exists

12-Which strategies have you tried to improve your sleep? (Select all that apply)

- Improving sleep environment (e.g., mattress, pillows, blackout curtains)
- Taking sleep aids (e.g., melatonin, magnesium)
- Sticking to a consistent sleep schedule
- Reducing screen time before bed
- Adjusting physical activity (e.g., exercising during the day or reducing evening activity)
- Adjusting diet or lifestyle (e.g., avoiding caffeine, lighter dinners, reduce alcohol intake)
- Using white noise or calming sounds
- Practicing meditation, relaxation, or breathing exercises
- Seeking professional help (doctor, sleep therapist, sleep study)
- Wearing earplugs and sleep mask
- Using sleep apnea treatment (e.g., CPAP, oral appliance)
- Taping your mouth
- I have not tried any of these strategies

13-How familiar are you with sleep apnea and its risks?

- Yes, I know what it is and understand its risks
- Yes, I know what it is but don't know much about its risks
- I've heard of it, but I'm not sure what it is
- No, I don't know what sleep apnea is

14-Do you have any of the following health conditions? (Select all that apply)

- High blood pressure
- Obesity
- Sleep apnea
- Chronic pain
- Diabetes
- Insomnia
- Diagnosed depression or anxiety
- None of the above

15-If you were diagnosed with sleep apnea, what are reasons that might prevent you from using treatment? (Select all that apply)

- I might prefer to explore natural remedies, such as lifestyle changes, instead of using treatment
- I might find treatment uncomfortable or difficult to use
- I might be unsure about the treatment options and would need more information before deciding
- I might be concerned about the side effects or risks of treatment
- I might not be able to afford treatment or have insurance coverage
- I don't think sleep apnea is a severe enough condition to need treatment
- None of the above - I would seek treatment and follow the recommended treatment plan

The Dreem Health Sleep Survey was conducted among 1,000 U.S. adults (18+), between February 14th and February 24th, 2025, via email invitation and online survey. The data is weighted to ensure national representation, with a margin of error of ± 3.1 percentage points.

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