

# How to Translate Consumer Perspectives into a Consumer Health Tech Assessment Roadmap in APAC



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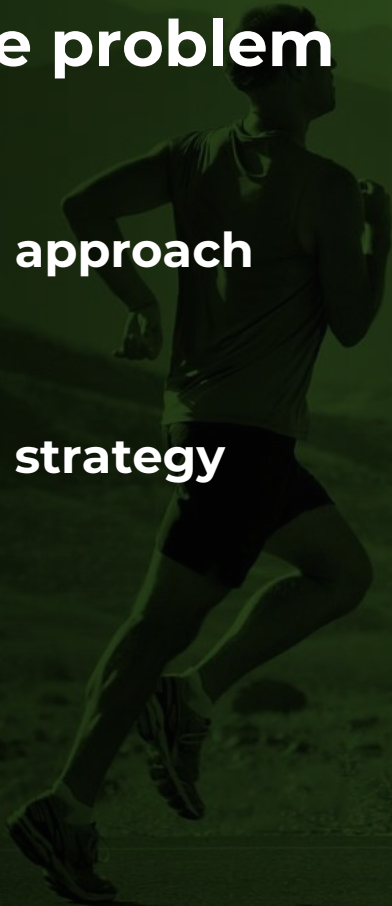
The  
Deciding  
Factor

# Agenda

**1** | **The problem**

**2** | **The approach**

**3** | **The strategy**

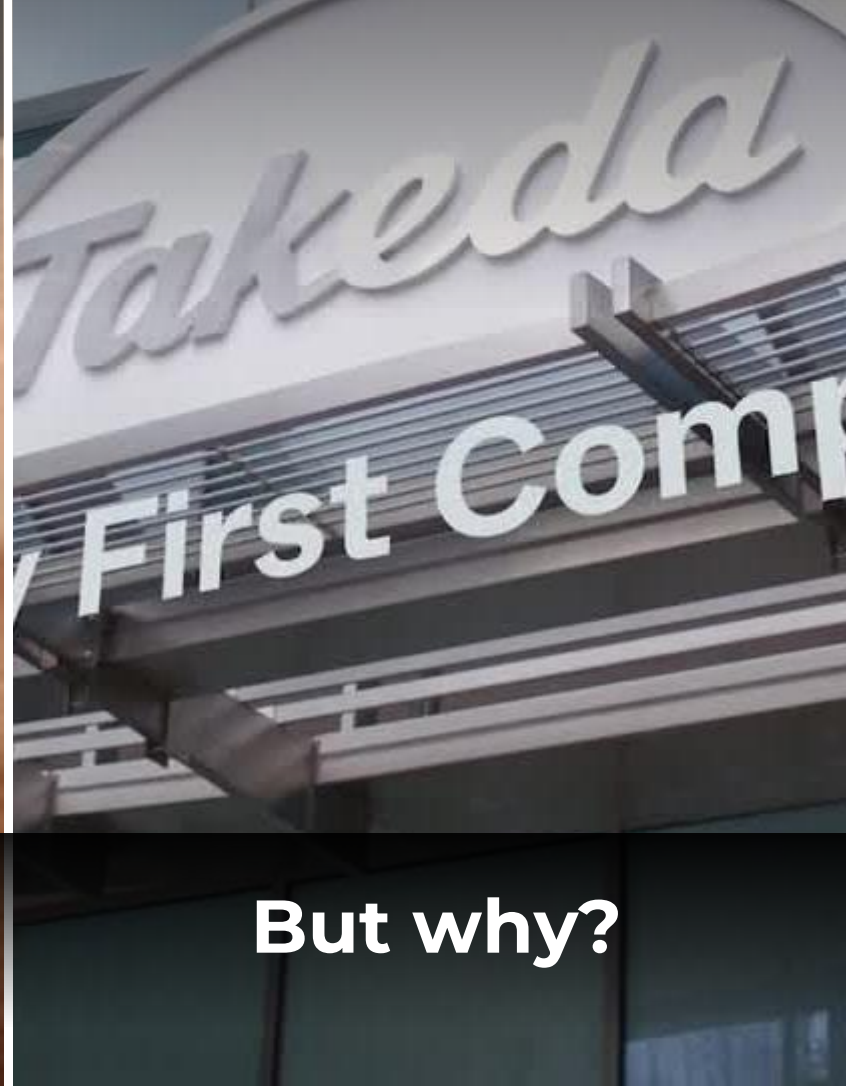




**Fitbit pulls out of  
select Asian  
markets in a  
surprising move**



**Takeda sells its  
consumer health  
business to  
Blackstone Group**



**Beyond Meat  
struggles to gain  
traction in China  
with its plant-  
based beef**



**But why?**

**Fitbit was losing out to competitors that could adapt new features for local markets**



**Takeda lost significant market share with no new products to address evolving market needs**



**Beyond Meat pushed plant-based beef in a nation that prefers pork**





**48**  
COUNTRIES

**60%**  
of the  
WORLD'S  
POPULATION

**2,300**  
LANGUAGES  
SPOKEN



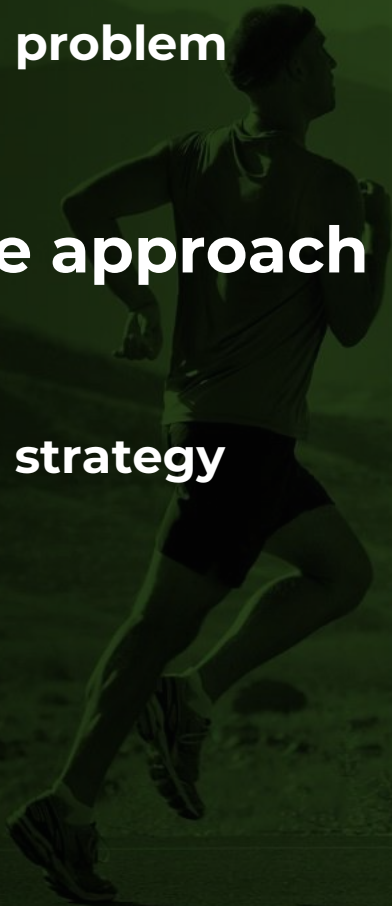
**One size  
doesn't  
fit all**

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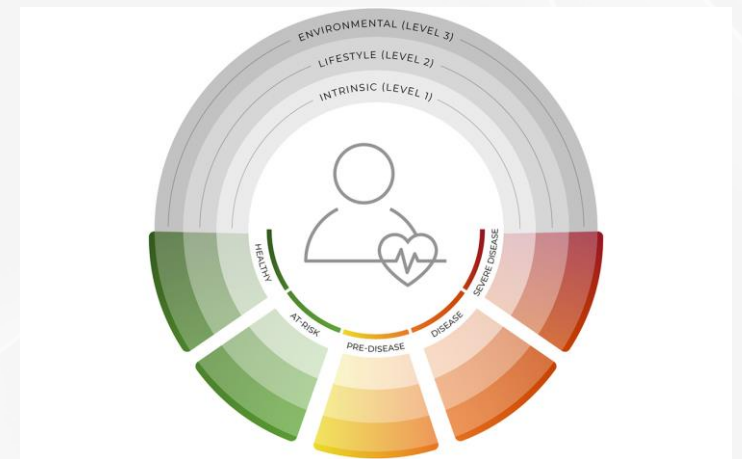




# Laying out a roadmap by leveraging anthropological insights from APAC consumers and the Lux Consumer Health Radar

There are two key frameworks we can use to construct a technology assessment roadmap for any consumer innovation strategy

1. AI-based anthropological insights from APAC consumers
2. The Lux Consumer Health Radar

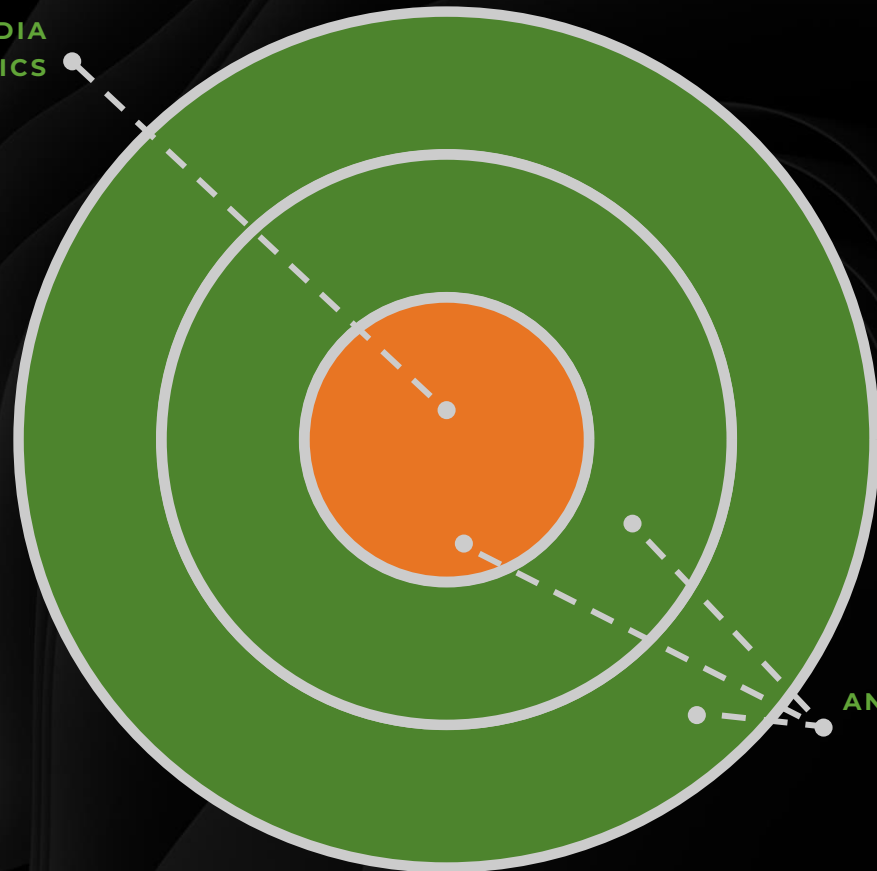


# Anthropology and AI to study millions of online conversations

Decoding the implicit beliefs of the consumer requires an understanding of *context*

BY ANALYZING THE ASSOCIATIONS OF THE ASSOCIATIONS, WE  
DISCOVER THE FORCES OF CHANGE

SOCIAL MEDIA  
ANALYTICS



ANTHROPOLOGY

## METHODOLOGY

AI + Ph.D. anthropologists

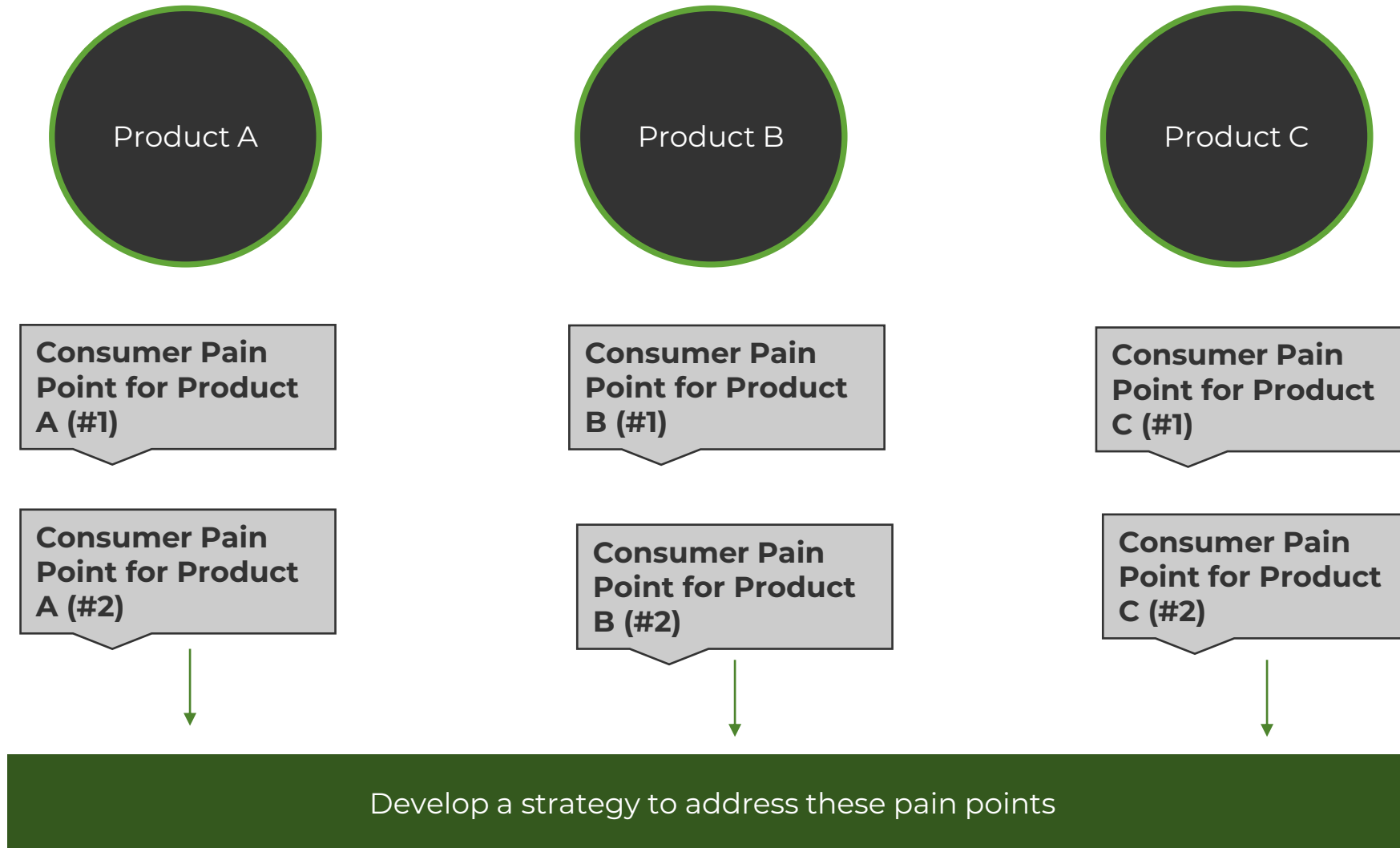
## SCALE

Data from >20 million U.S. consumers and globally across 13 other countries

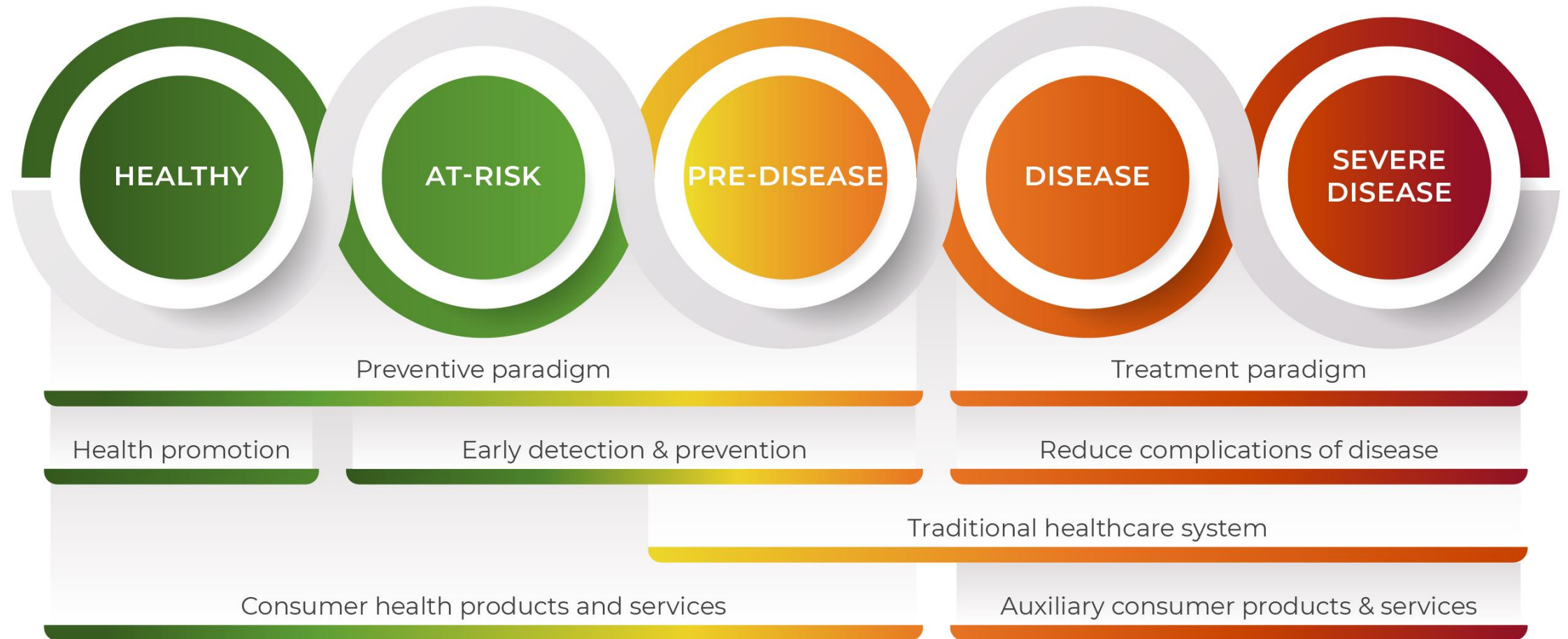
## REPRESENTATION

Representative sample of consumers between the ages of 18 and 74.

# Using predictive anthropology to extract consumer pain points from existing products for a given market



# Developing a framework to better understand and capture market opportunities for consumer health



# Developing a framework to better understand and capture market opportunities — The Lux Physical Lens

## Intrinsic (Level 1)

- Everything internal to a consumer
- Example: Genetics, physiology

## Lifestyle (Level 2)

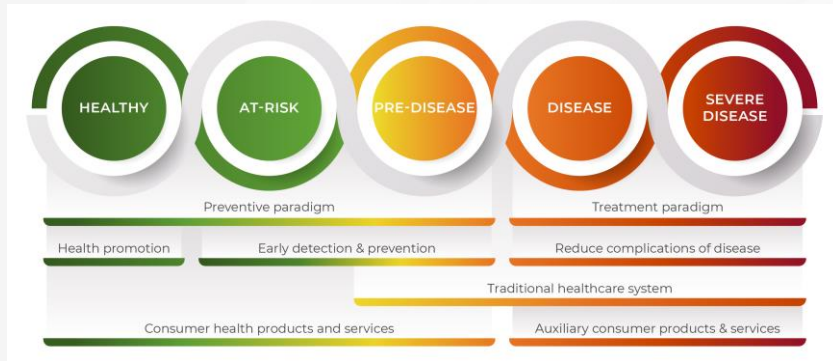
- Everything related to lifestyle choices
- Example: Dietary choices, personal care, apparel



## Environmental (Level 3)

- Everything around a consumer
- Example: Air quality, light, humidity, temperature, ergonomics

# Putting these models together gives us the Lux Consumer Health Radar



**What is the  
one thing we  
all need but  
never seem  
to get  
enough of?**





# Objective, peer-reviewed data show that people in APAC sleep less well



Sleep Medicine

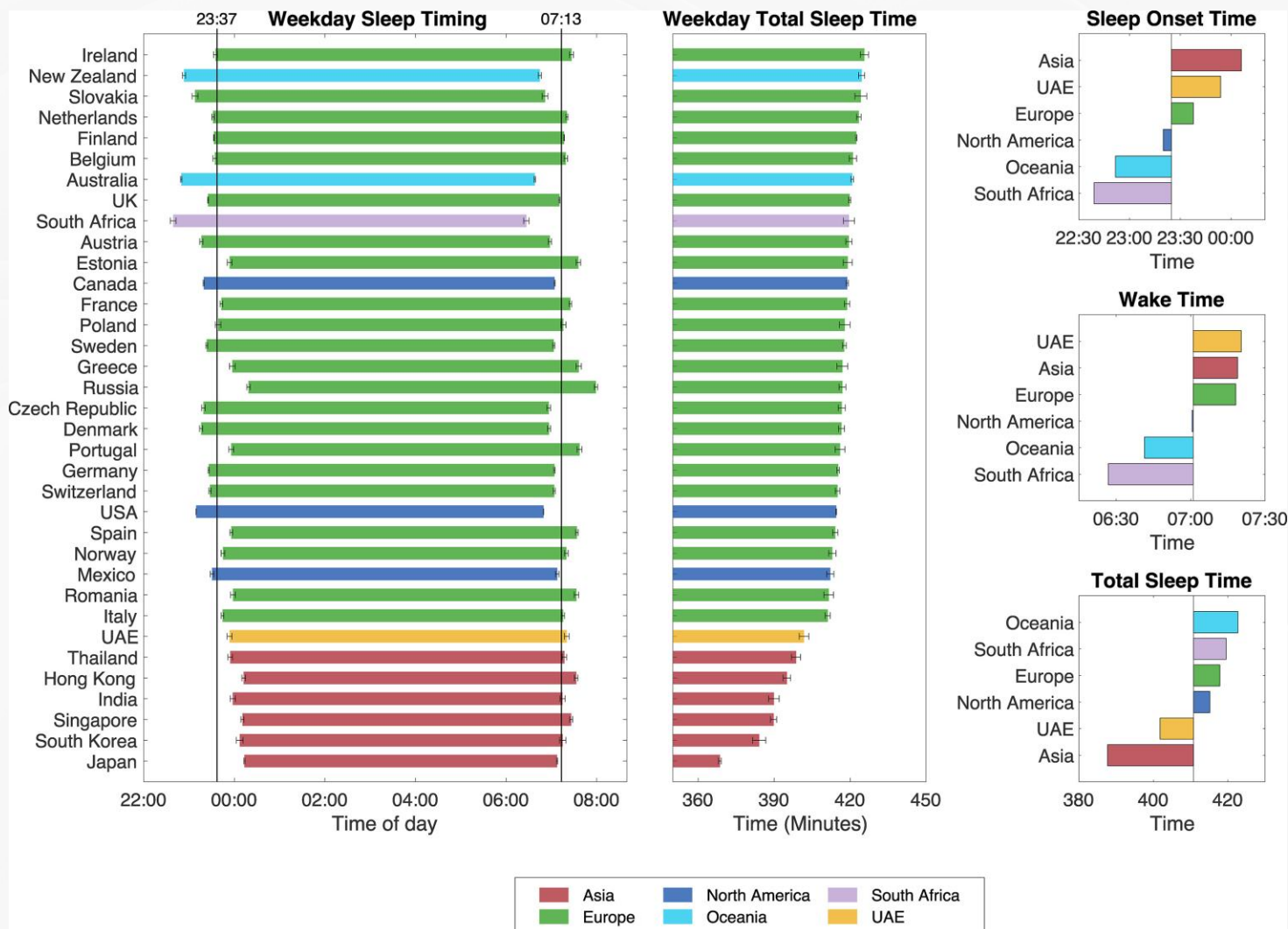
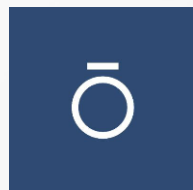
Volume 110, October 2023, Pages 155-165



## Country differences in nocturnal sleep variability: Observations from a large-scale, long-term sleep wearable study

Adrian R. Willoughby<sup>a</sup>, Iman Alikhani<sup>b</sup>, Mari Karsikas<sup>b</sup>, Xin Yu Chua<sup>a</sup>,

Michael W.L. Chee<sup>a</sup>



# Objective, peer-reviewed data show that people in APAC sleep around 6 to 7 hours on weekdays



Sleep Medicine

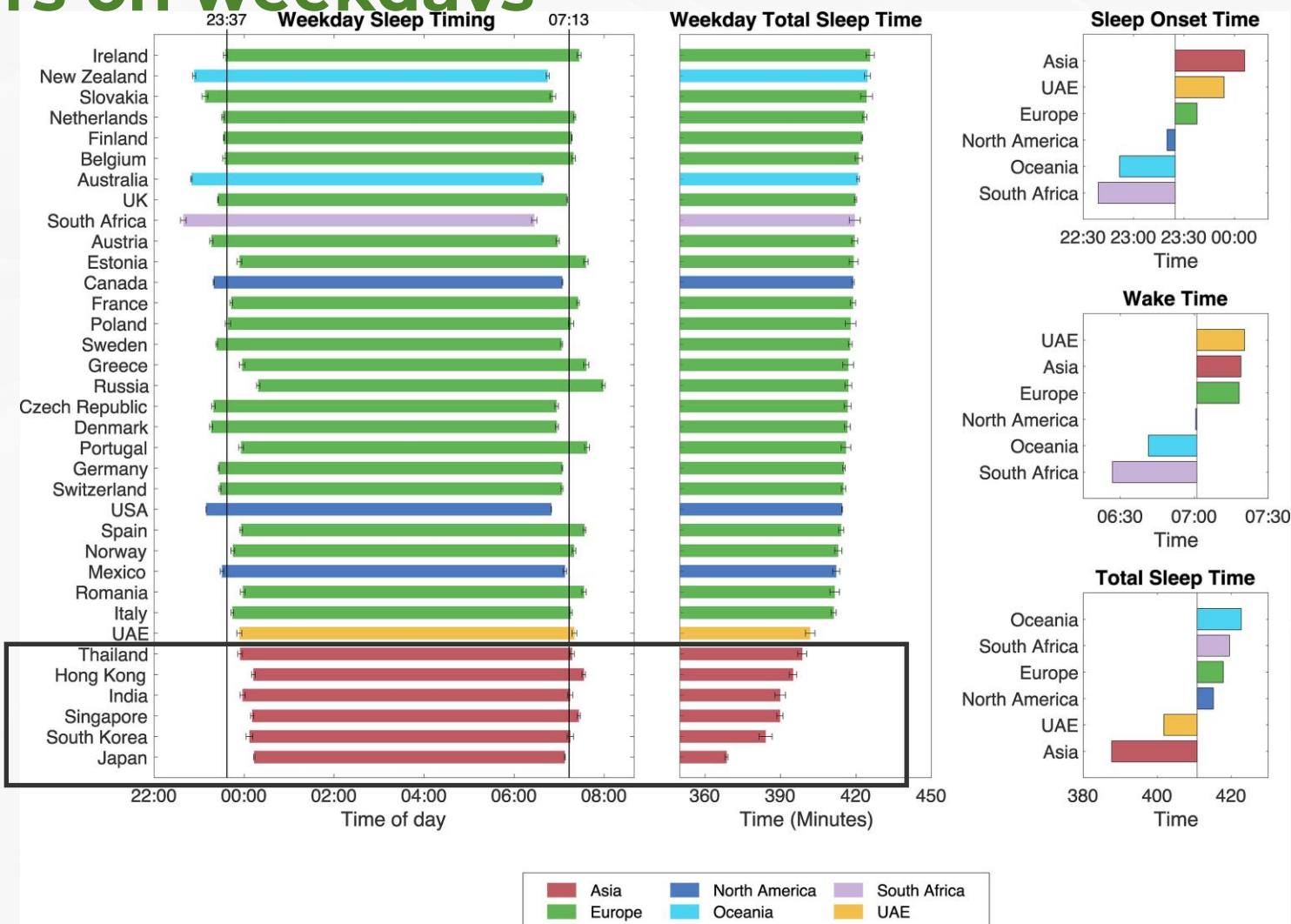
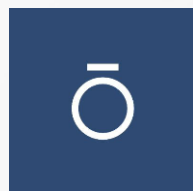
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## Country differences in nocturnal sleep variability: Observations from a large-scale, long-term sleep wearable study

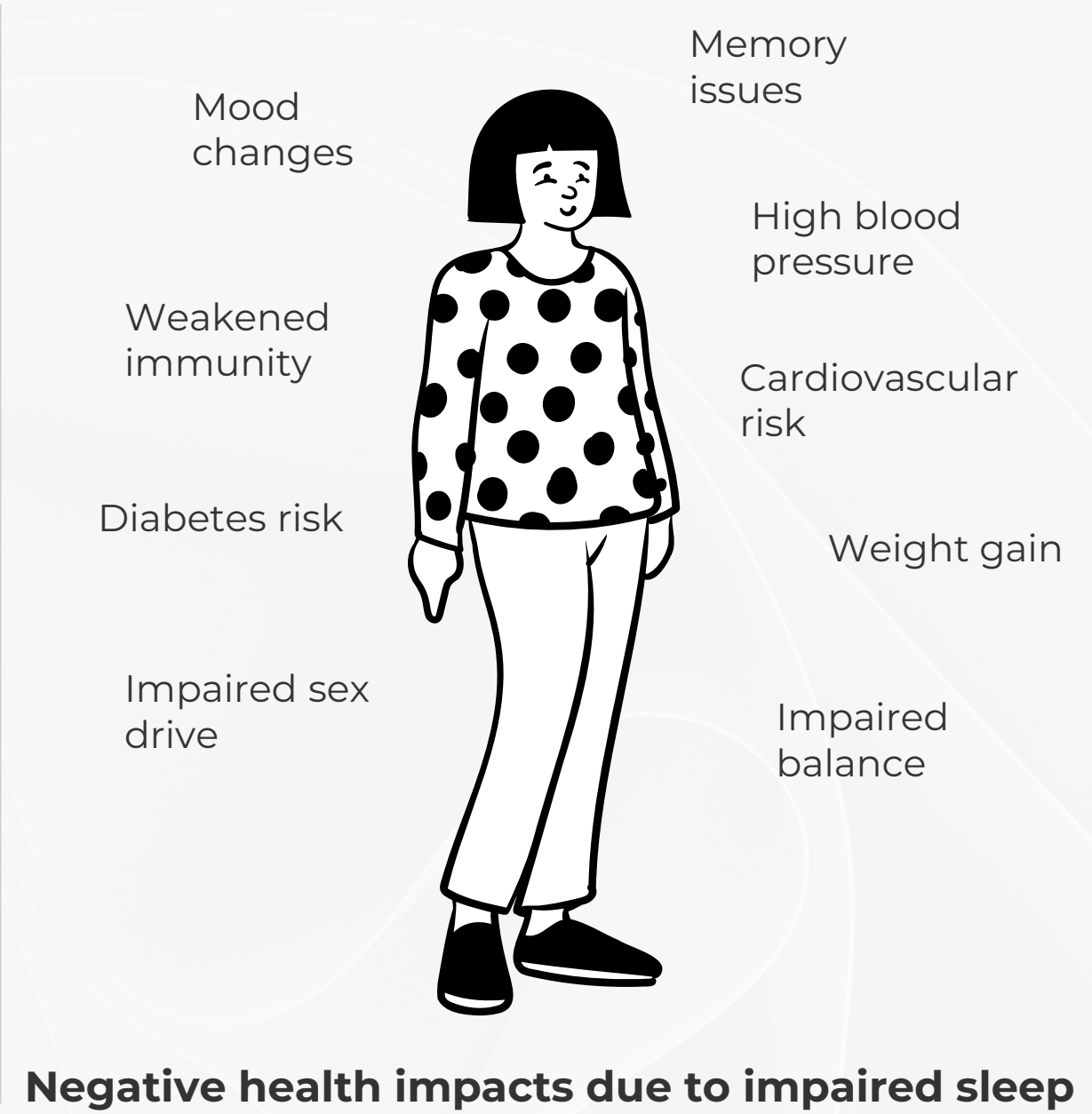
Adrian R. Willoughby<sup>a</sup>, Iman Alikhani<sup>b</sup>, Mari Karsikas<sup>b</sup>, Xin Yu Chua<sup>a</sup>,

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## Poor sleep quality can impact individuals in multiple ways

- It is the root cause of multiple major diseases, from cognitive health to diabetes
- It leads to huge economic impacts both **directly (healthcare costs)** and **indirectly (economic productivity)**

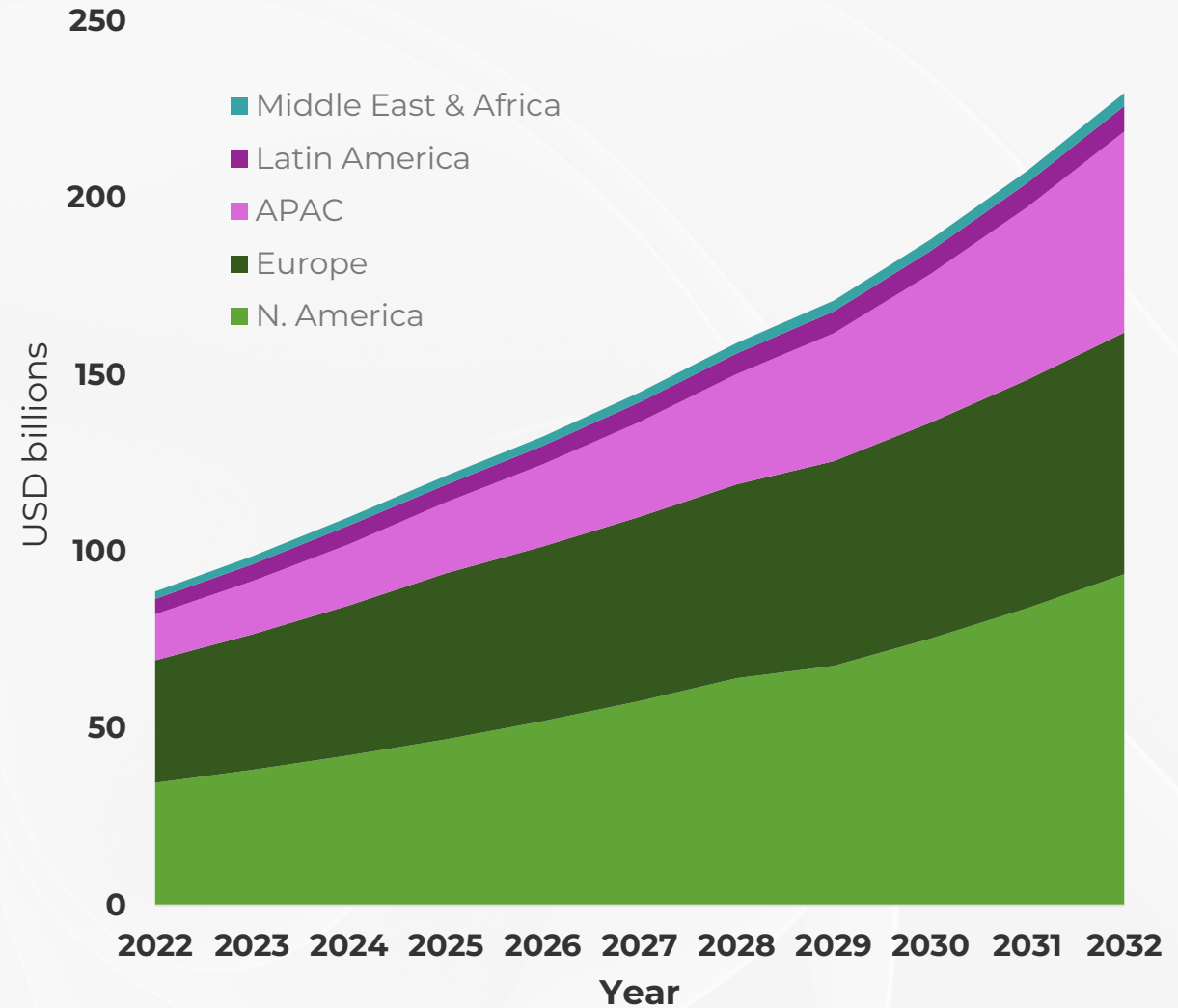


**Negative health impacts due to impaired sleep**

## APAC expects to see the fastest growth

- The sleep health market is projected to grow at a **steady CAGR of 5.4% globally**
- The rate of growth in APAC is **expected to be double** (10%) over the same period, with Japan being a major market in the region

## Sleep Health Market Size Forecast



# Several key consumer devices for sleep health are used in Japan from our anthropological insights



**Sleep trackers**



**White noise and  
noise-reduction  
devices**



**Light therapy  
devices**

# Pain points from Japanese consumers for sleep trackers



Size and comfort

Effectiveness vs. alternatives

Cost concerns

Skin irritation

## Product examples in Japan



Xiaomi "Mi Smart Band 6"



Muse EEG Headband



Soxai RING 1



Tanita Sleep Monitor

# Pain points from Japanese consumers for white noise and noise-reduction devices



Lack of Bluetooth and remote control

Repetitive noise patterns

High-pitched noises

Poor fit and airtightness

## Product examples in Japan



Dreamegg White Noise Machine D3 Pro



Bose Sleepbuds 2



Loop Quiet



Yasopsu

# Pain points from Japanese consumers for light therapy devices



High cost

Effectiveness and features

Limited options

## Product examples in Japan



Brain Sleep Clock + Aroma



Morning Meme Light Sleep Mask

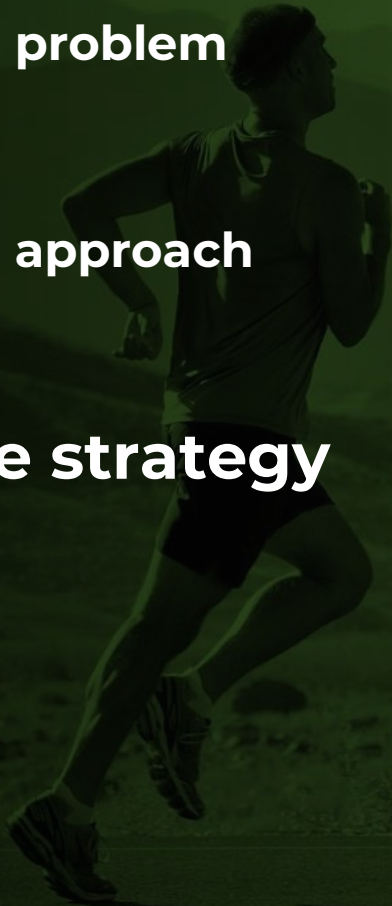


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# Several key sleep health solutions are used in Japan from our anthropological insights



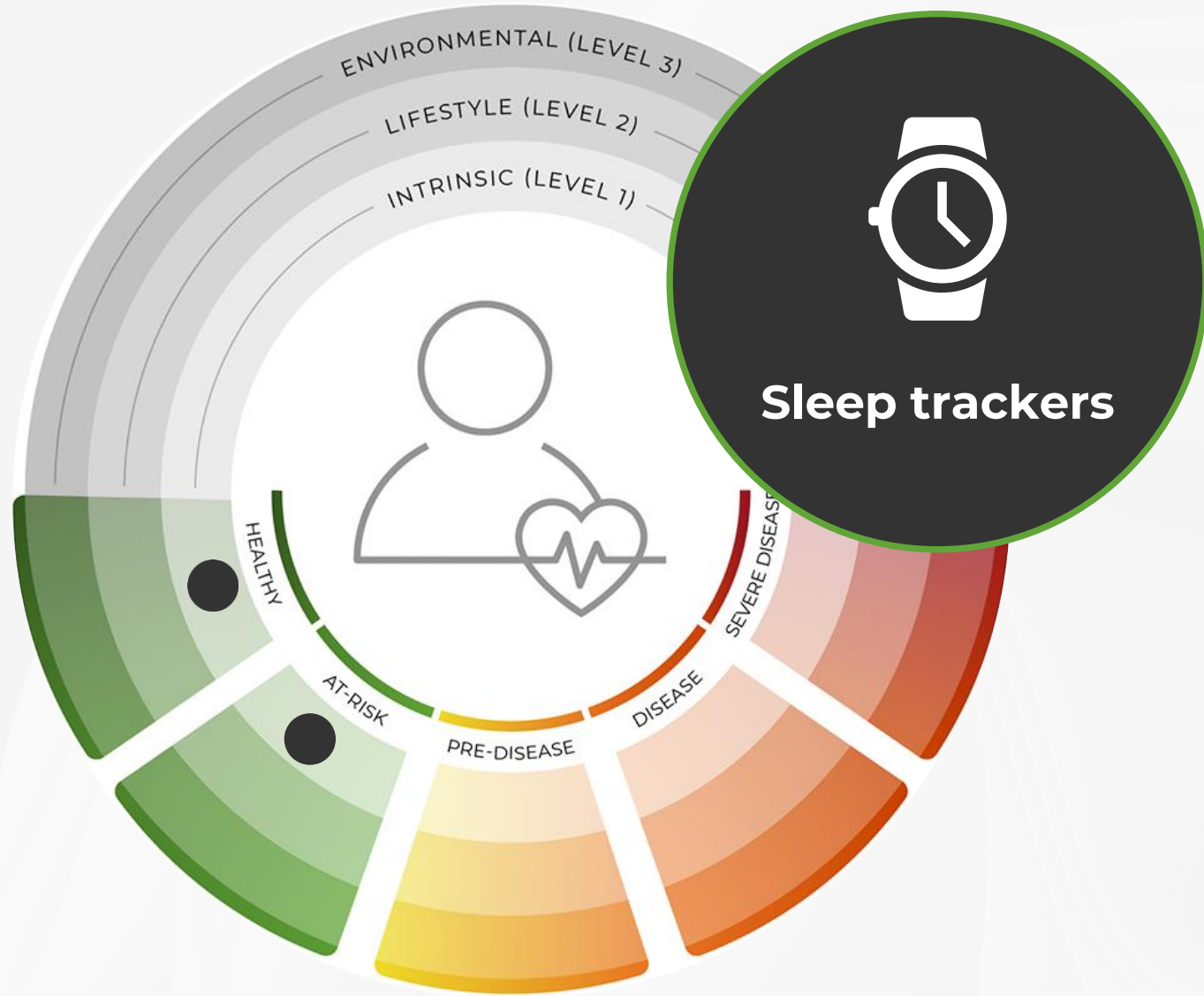
**Sleep trackers**



**White noise and  
noise-reduction  
devices**

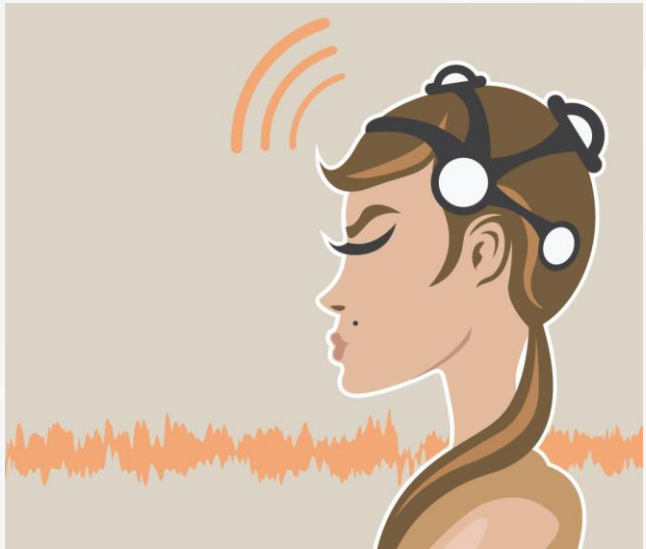


**Light therapy  
devices**



**Size and comfort**

**Effectiveness vs. alternatives**



● Current EEG headbands for sleep health



● Current EEG headbands for sleep health

○ Neurobit's chest patch



## Neurobit Technologies



[www.mysleep.study](http://www.mysleep.study)

Instead of a headband, **Singaporean startup Neurobit** is developing a less intrusive chest patch as a form factor.

# Several key sleep health solutions are used in Japan from our anthropological insights



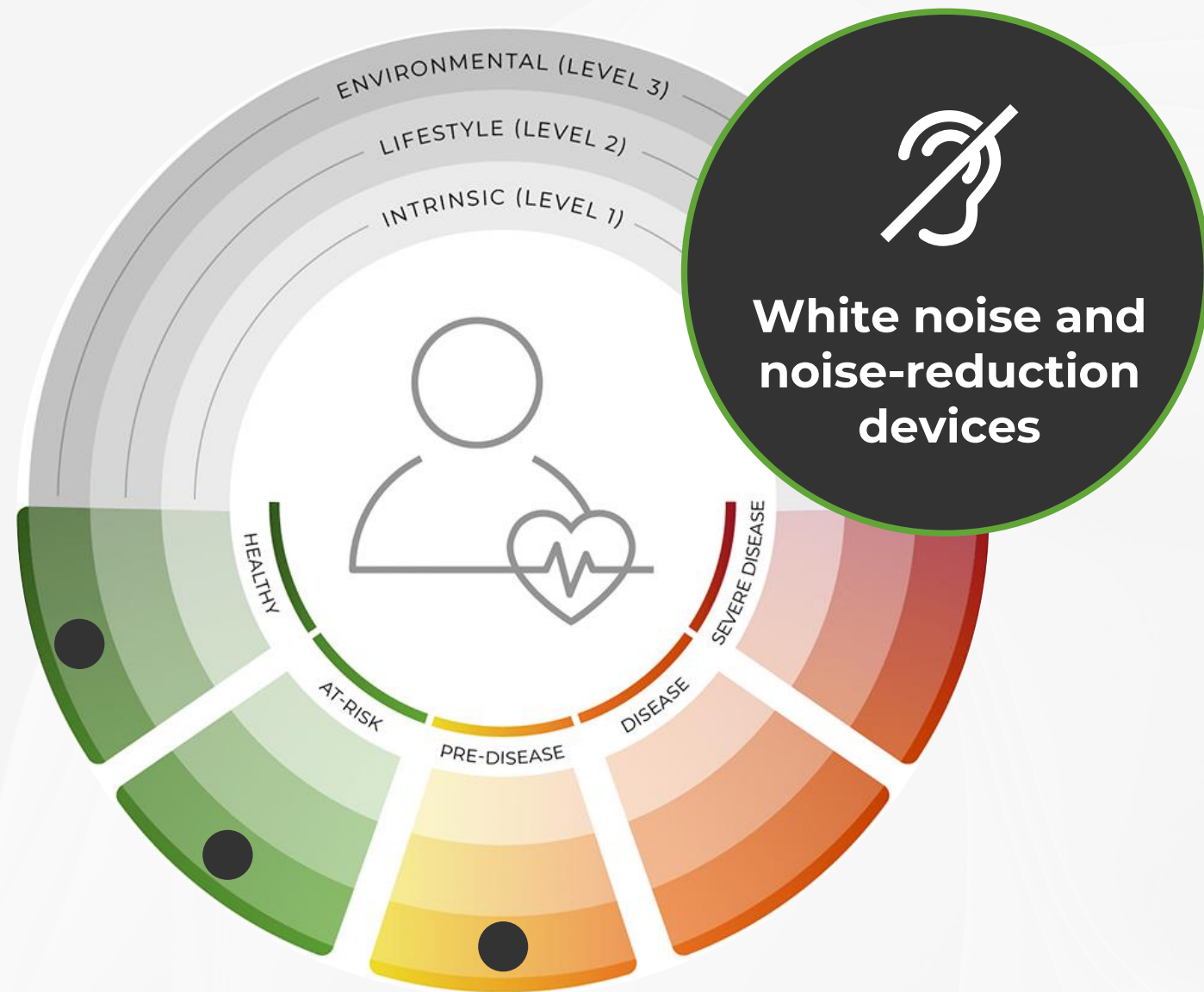
Sleep trackers



White noise and  
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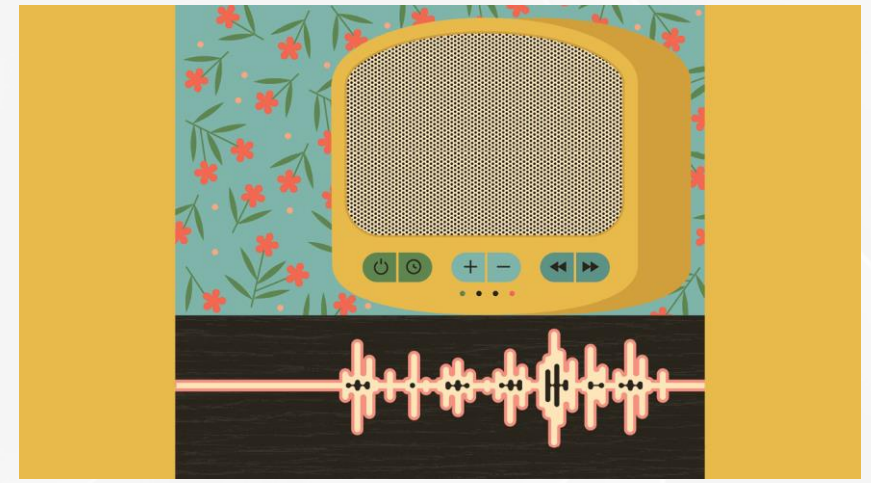


Light therapy  
devices

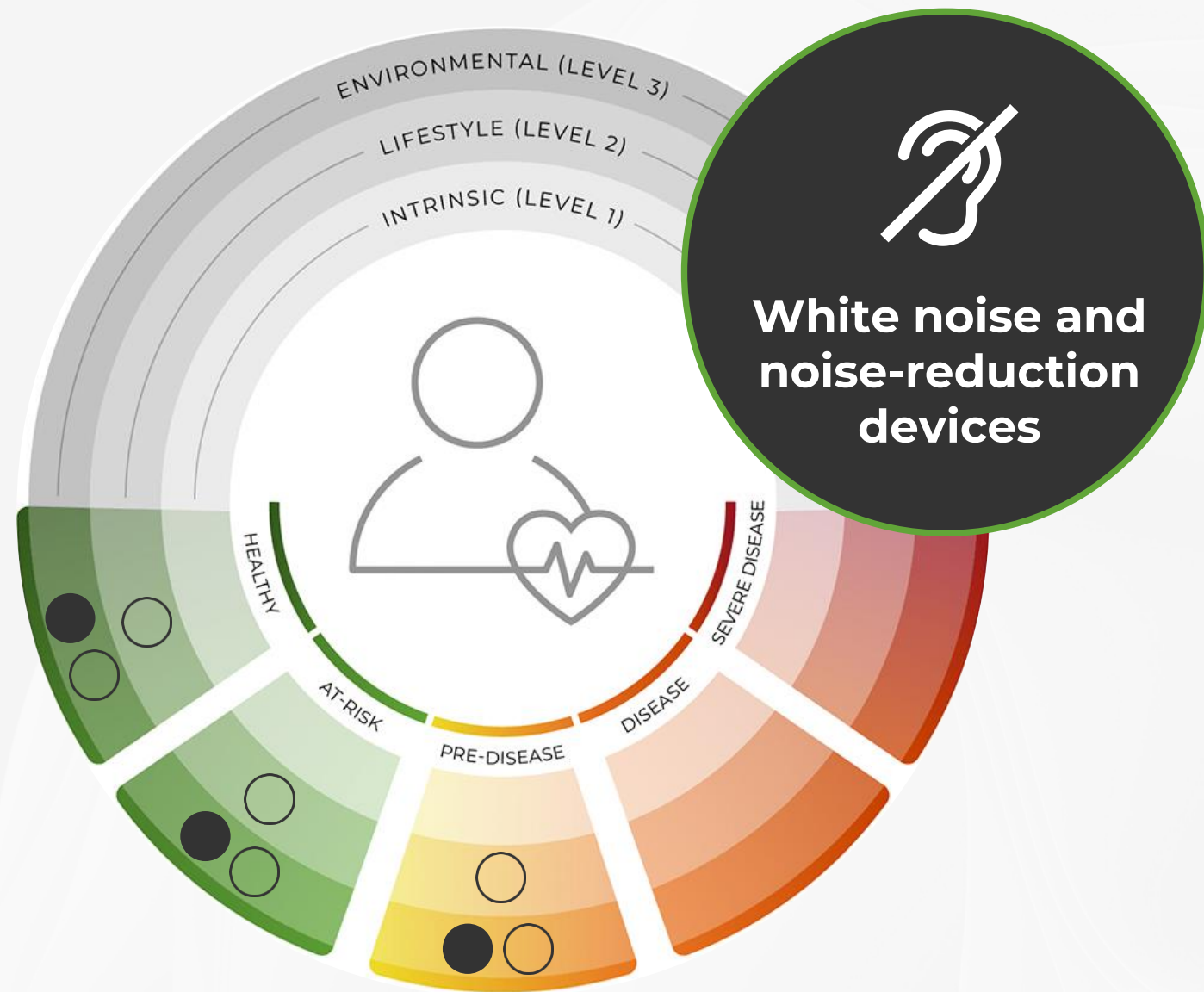


**White noise and noise-reduction devices**

**Repetitive noise patterns**



● Current white noise and noise-reduction devices



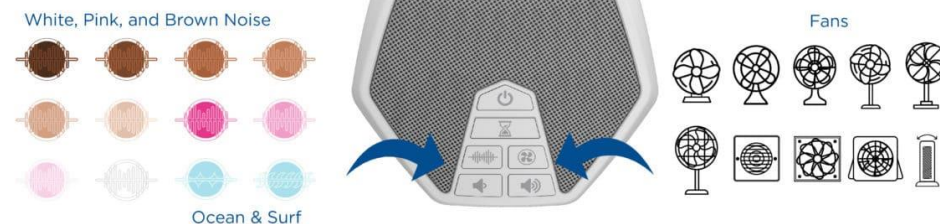
● Current white noise and noise-reduction devices

○ ASTI's LectroFan



## ASTI's LectroFan

### 22 SOUNDS TO MATCH YOUR ENVIRONMENT



LectroFan has an **expanded range** of nonlooping noise settings, which can also be used outside sleep settings.

It comes at a cost of USD 50.

# Several key sleep health solutions are used in Japan from our anthropological insights



Sleep trackers

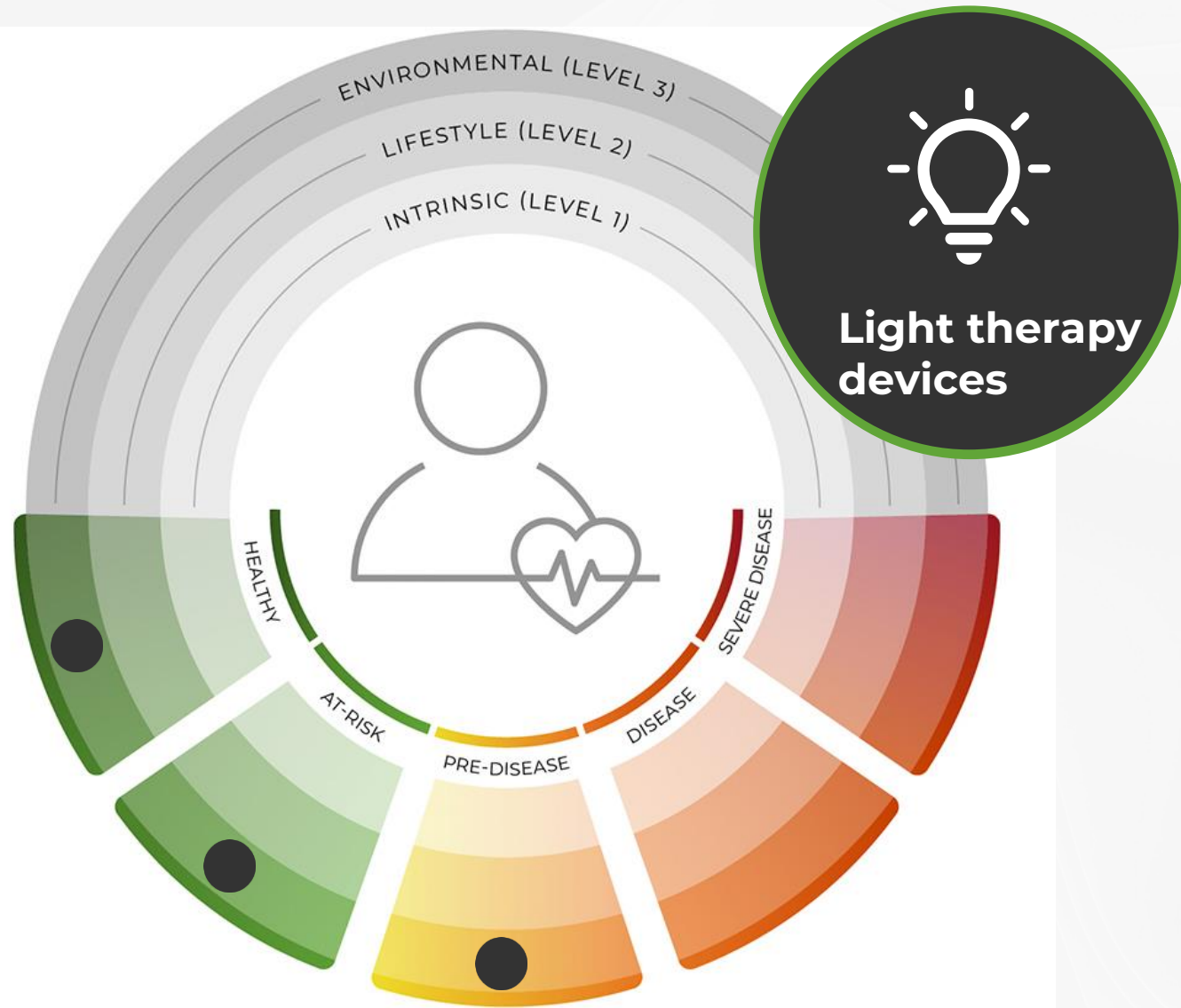


White noise and  
noise-reduction  
devices



Light therapy  
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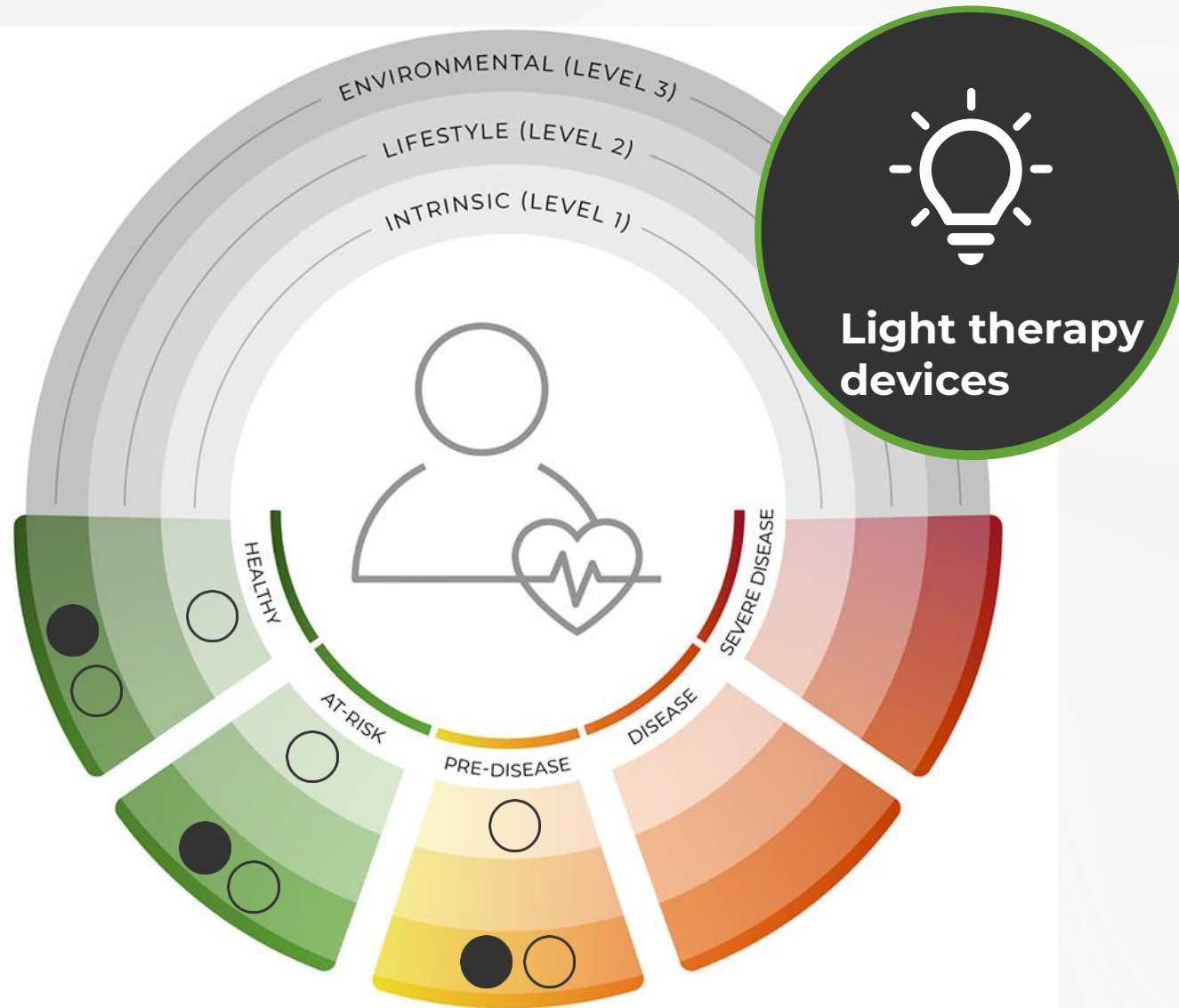






**Effectiveness and features**



● Current light therapy devices



-  Current light therapy devices
-  Helight Sleep



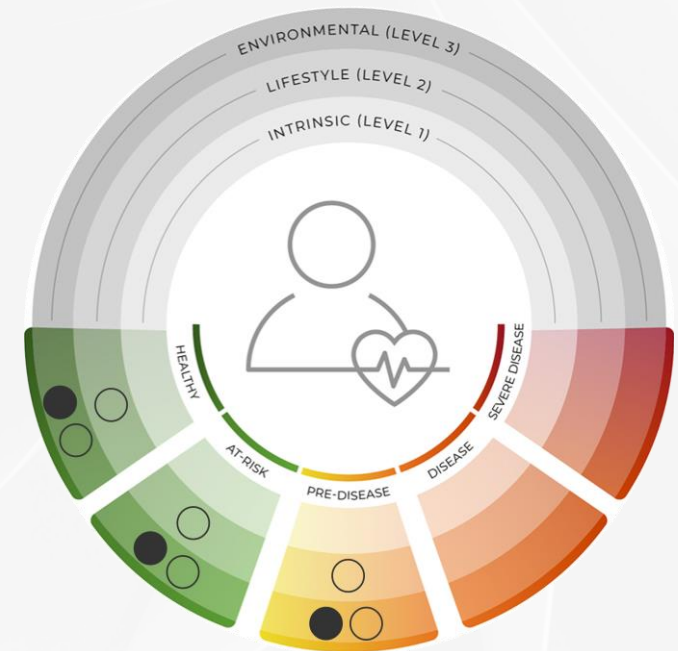
**Helight Sleep emits pure red light** at a wavelength of 630 nm for 14 minutes and then fades out.

The light passes through the eyelids and interacts with photosensitive cells to promote deeper, restful sleep.

# Anthropological insights used in combination with the Lux Consumer Health Radar can help you develop a tech assessment roadmap

For a quick win, you could potentially partner with a company like ASTI and its LectroFan and explore how to deliver even more value, perhaps by connecting a wearable like Neurobit's chest patch to not only help improve sleep but monitor and track progress through vital sign data.

We used **sleep health** as a use-case to demonstrate how you can combine anthropological insights in combination with our Lux Consumer Health Radar to identify new and innovative approaches to tackle deep-rooted consumer concerns. You can apply the same approach to other consumer challenges.



# Key Takeaways

1

Realize that APAC consumers are diverse and unique and require a contextualized understanding.

2

Start by decoding implicit beliefs unique to your APAC market.

3

Use our Lux Consumer Health Radar to identify technologies that can deliver maximum impact to your target market.

# Thank you

A link of the webinar recording will be emailed within 24–48 hours.

## UPCOMING WEBINARS

FEBRUARY 29

Balancing Consumer Perspectives  
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the Adoption of Sustainable Products



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