

# Lumora Sleep

## Customer Discovery & Market Validation Summary

### Overview

Lumora Sleep conducted early-stage customer discovery interviews to assess the severity, frequency, and economic impact of sleep challenges, with a focus on both high school students and working professionals. While our initial hypothesis centered on students, our research quickly showed that poor sleep is not limited to younger age groups. It is a widespread issue affecting students, working adults, and older individuals alike.

This summary reflects qualitative and quantitative findings from 17+ participants, including general respondents (ages ~18–55) and five in-depth student interviews. Additional informal responses were collected from student-athletes and working professionals. Across all groups, sleep disruption appeared consistently frequent, frustrating, and tied to real declines in energy, focus, and daily performance.

### Problem Prevalence

#### Reported Sleep Difficulty

Among respondents directly asked whether they struggle with sleep:

- 83% (5 of 6 recorded responses) said yes
- The remaining respondent said “sometimes”

Across both students and working professionals, sleep disruption was described as frequent and recurring rather than occasional.

#### Self-Rated Sleep Quality

Participants rated their sleep on a 1–10 scale:

*Recorded ratings: 4–8*

*Average rating: approximately 6/10*

This indicates moderate but persistent dissatisfaction across age groups. Both students and adults described their sleep as “fine but not great,” suggesting a large opportunity for improvement.

### Core Sleep Issues Identified

## 1. Phone and Screen Usage

The most frequently cited contributor to poor sleep, especially among students, was phone usage before bed. Approximately 70% of respondents referenced:

- Scrolling social media
- Gaming
- Watching videos
- Difficulty putting their phone away

Among working professionals, this showed up differently but still mattered. Many described late-night email checking, scrolling, or difficulty disconnecting from work, leading to delayed sleep.

## 2. Anxiety and Mental Overactivity

Roughly 50% of respondents across all groups referenced stress, overthinking, or anxiety as a major driver of sleep issues. Common themes included:

- “Brain won’t shut off”
- Stress about school, work, or responsibilities
- Feeling physically tired but mentally alert

This was especially consistent among working professionals, who often described difficulty unwinding after long days or waking up during the night due to stress.

## 3. Extended Sleep Latency

Among student interviews:

- Average time to fall asleep: 45–90 minutes
- In some cases: up to 2 hours

Among working professionals, while exact timing varied, many still reported taking a long time to fall asleep or waking up multiple times during the night, indicating similar underlying problems with sleep onset and quality.

## Sleep Duration

Students reported:

- 5 to 7 hours per night
- Average: ~5.8–6 hours

This is well below the recommended 8–10 hours.

Working professionals did not always report the same consistent deficit, but many described:

- Interrupted sleep
- Waking up during the night
- Not feeling rested even after a full night

This suggests the issue is not only duration, but also *sleep quality and consistency* across age groups.

## Impact on Performance

### Academic Impact (Students)

- Reduced focus in class
- Falling asleep during school
- Lower test performance
- Increased irritability

### Athletic Impact (Students)

- Decreased performance
- Harder practices
- Skipped workouts due to fatigue

### Professional & Daily Impact (Adults)

- Lower energy throughout the day
- Difficulty concentrating at work
- Mental fog and slower thinking
- Increased stress and irritability

### Emotional Impact (All Groups)

- Increased irritability
- Emotional sensitivity
- Heightened stress responses

Sleep disruption was consistently tied to real-world performance and quality-of-life issues across both students and working professionals.

## Current Solutions and Spending Behavior

Respondents across age groups are already experimenting with solutions:

### Paid Solutions

- Melatonin: \$12–15/month

- Magnesium: ~\$25/month

Among both students and adults, supplements were described as:

- Inconsistent
- Causing grogginess
- Leading to unwanted side effects like strange dreams

#### **Free Solutions**

- Meditation apps
- White noise
- Exercise

#### **Key observation:**

Most current solutions are either temporary, inconsistent, or require ongoing effort. Many respondents expressed frustration with needing to rely on pills or apps that do not fully solve the problem.

## **Segment Analysis**

#### **Primary Segment: Working Professionals**

Working professionals represent the strongest long-term market:

- Frequent stress-related sleep issues
- Willingness to spend on solutions
- Clear daily performance impact
- Larger purchasing power

#### **Secondary Segment: Students**

Students, especially high-performing students and athletes, remain a strong early segment:

- High frequency of sleep disruption
- Direct academic and athletic consequences
- Early willingness to try new solutions

#### **Additional Segments**

- Travelers (inconsistent environments)
- High-performance individuals (focus and recovery)
- Corporate wellness and team productivity
- Potential military applications

## **Buying Intent Signals**

When asked whether they would try a non-medication solution that helped them fall asleep faster and wake up refreshed:

- All respondents said yes.

While stated interest alone is not sufficient validation, it is supported by:

- Ongoing monthly supplement spending
- Clear frustration with existing solutions
- High frequency of sleep disruption
- Performance-linked consequences

## Key Indicators Summary

- 83% reported sleep difficulty
- Average sleep rating: ~6/10
- Average sleep latency: ~60 minutes
- Average sleep duration: ~5.8–6 hours
- 60% of student interviews described high-frequency disruption (5–7 nights per week)
- 40% actively spending monthly on sleep-related products
- 100% expressed interest in a non-pharmaceutical improvement solution

## Conclusion

Customer discovery indicates that sleep disruption is:

- Frequent
- Performance-impacting
- Emotionally frustrating
- Present across age groups

While students show strong early traction, working professionals represent the largest and most scalable market due to their consistent sleep challenges and higher willingness to pay.

Across both groups, current solutions are often incomplete, inconvenient, or unsatisfying. This creates a clear opportunity for a simple, non-pharmaceutical solution that improves the sleep environment itself.

Lumora is positioned to serve both segments, starting with high-urgency users and expanding into a broader market where better sleep directly improves daily performance and quality of life.