Market Report

Narcolepsy

Objective

- Conduct market research to better understand Narcolepsy patients

- Utilize Facebook ads to attract research participants and direct them to a dedicated landing page and survey

Definition of a Qualified Lead

- Target men and women ages 18 to 65 who are experiencing symptoms of or are at risk for Narcolepsy and are interested in going to a sleep specialist

Key Metrics

- Number of Qualified Surveys
- Cost Per Lead (CPL)
- Cost Per Qualified Lead (CPQL)
- Survey Data

Campaign Assets

- 2 ad concepts to attract Narcolepsy patients

- 1 unique landing page with embedded survey

- 1 market research survey designed to connect with Narcolepsy patients

- 1 thank-you landing page

Process

Creative Development

- To attract Narcolepsy patients, we produced 2 visual variants following proven 83bar best practices.

- The main concept is to use graphics (instead of stock photos) that convey the messaging and force users to stop and look at the ad since it stands out from other content in their newsfeed.

Set Up Ad Targeting & Launch

- Target men and women ages 18 to 65 in the United States via paid Facebook newsfeed ads

Measure Results

- Determine Cost per Lead (CPL) for qualified patients generated and analyze survey responses

Results

- Determined winning messaging concept to attract potential patients

- Captured willingness to share information

- Refined understanding of Narcolepsy patients

Acquisition Metrics

- $600 spent on ads

- 93 total leads (a.k.a. survey completions)

- $6.45 CPL (Cost Per Lead)

- $4.15 CPL for No. 1 ad

- 5 qualified leads (diagnosed with Narcolepsy)

- $120 CPQL (Cost Per Qualified Lead)

Attract patients who need treatment

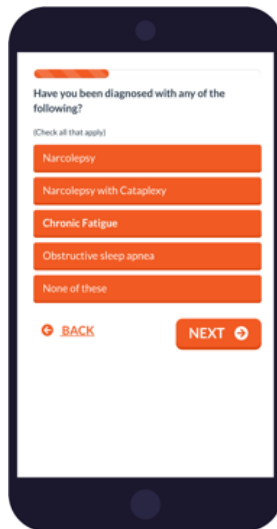Optimized to ensure high consumer engagement

Social Media

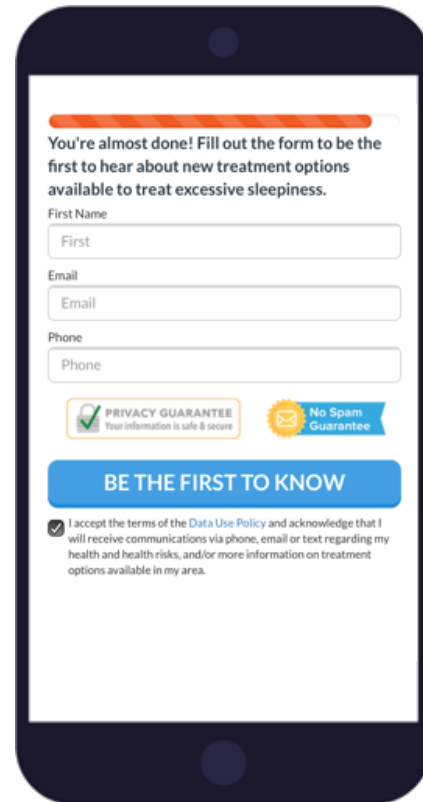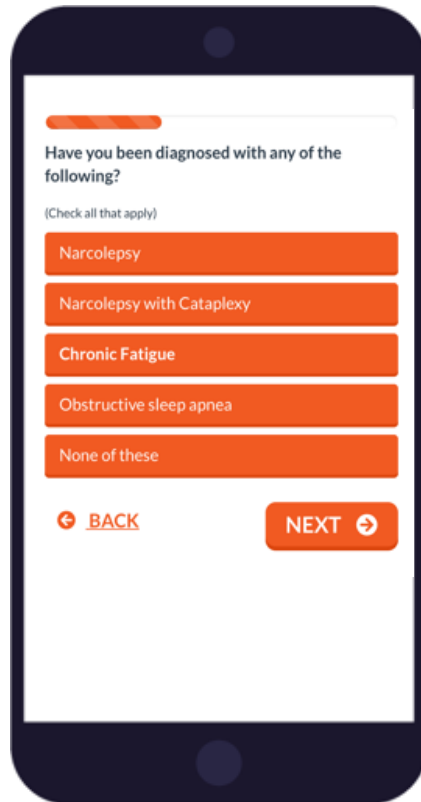### Landing Page

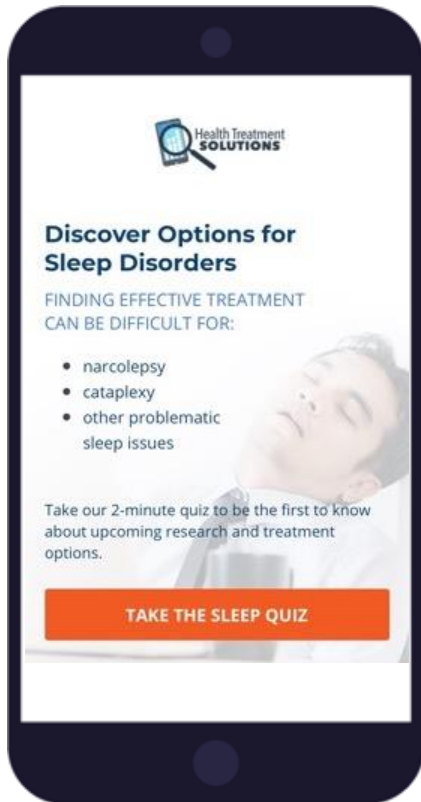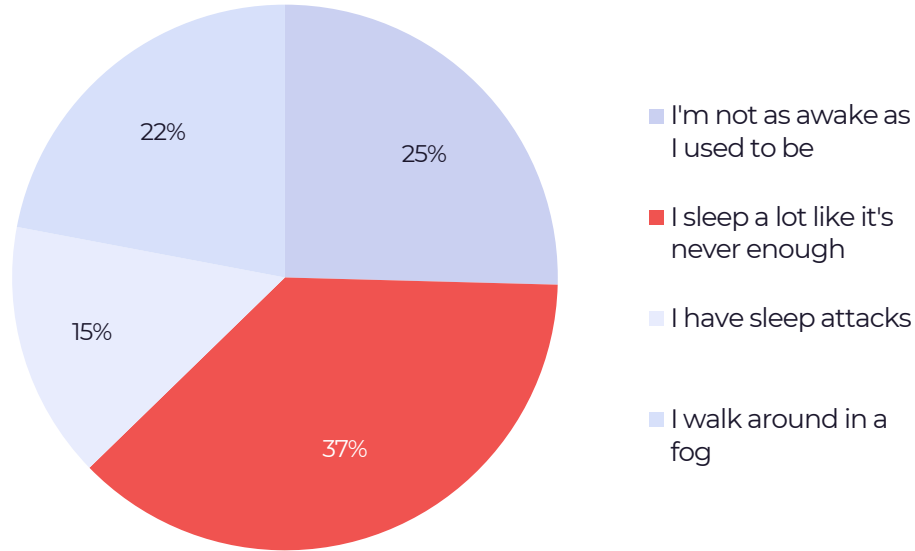### Symptoms

Submit

Our Goals

Generate clicks with illustrated ads that stand out in social newsfeed

Optimize percentage of respondents who complete survey with engaging experience

Attract — **Engage** — **Qualify** — **Collect**

83bar

How would you describe your situation?

- 22%
- 25%
- 15%
- 37%

- I'm not as awake as I used to be
- I sleep a lot like it's never enough
- I have sleep attacks
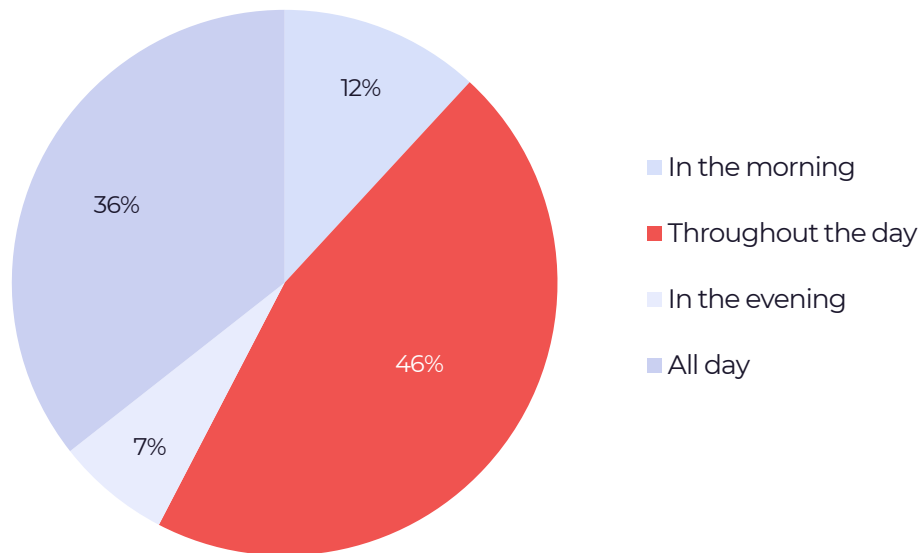- I walk around in a fog

Key Findings

- Captured responses from all leads

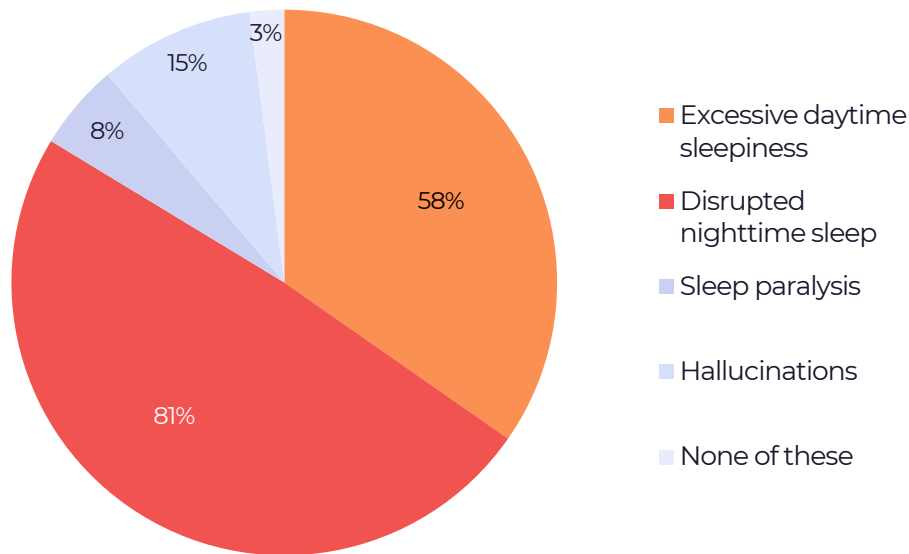- Majority of respondents said they slept a lot as though they never had enough sleep

When do you experience this?

Key Findings

- Captured responses from all leads

- Based on the previous question, an overwhelming majority of respondents admitted they felt sleepy or slept a lot throughout the day or all day

- In the morning
- Throughout the day
- In the evening
- All day

12%

36%

46%

7%

83bar

Do you experience any of the following?

- 3%
- 15%
- 8%
- 58%
- 81%

■ Excessive daytime sleepiness

■ Disrupted nighttime sleep

■ Sleep paralysis

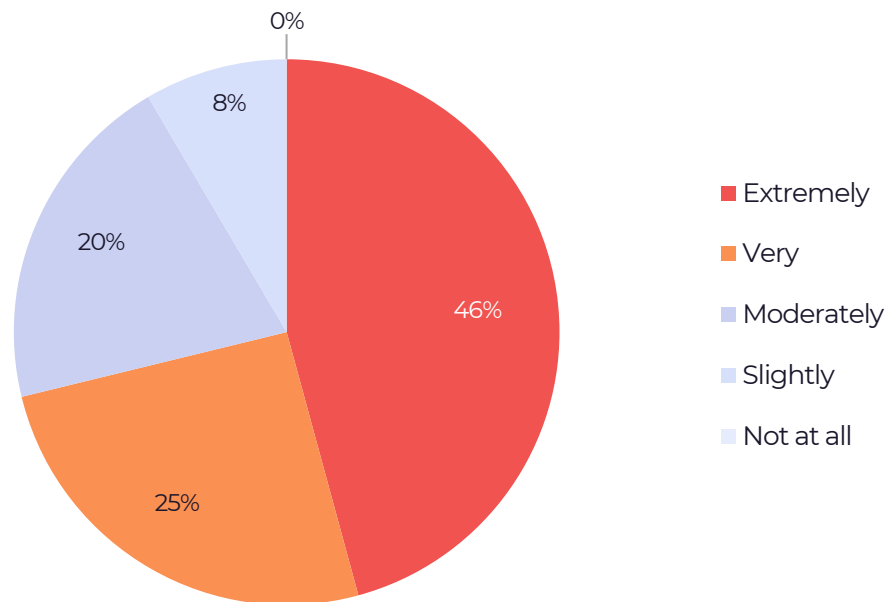■ Hallucinations

■ None of these

Key Findings

- Captured responses from all leads

- Respondents were asked to check all that applied

- More than 80% of all respondents experienced disrupted sleep at night

- **More than 50% admitted they had excessive daytime sleepiness**

83bar

How much do your symptoms impact your daily life?

- Extremely
- Very
- Moderately
- Slightly
- Not at all

0%
8%
20%
46%
25%

Key Findings

- Captured responses from all leads

- Nearly 50% of respondents said their symptoms extremely impacted their daily lives

- It is worth noting that all respondents were negatively impacted by their symptoms at varying degrees
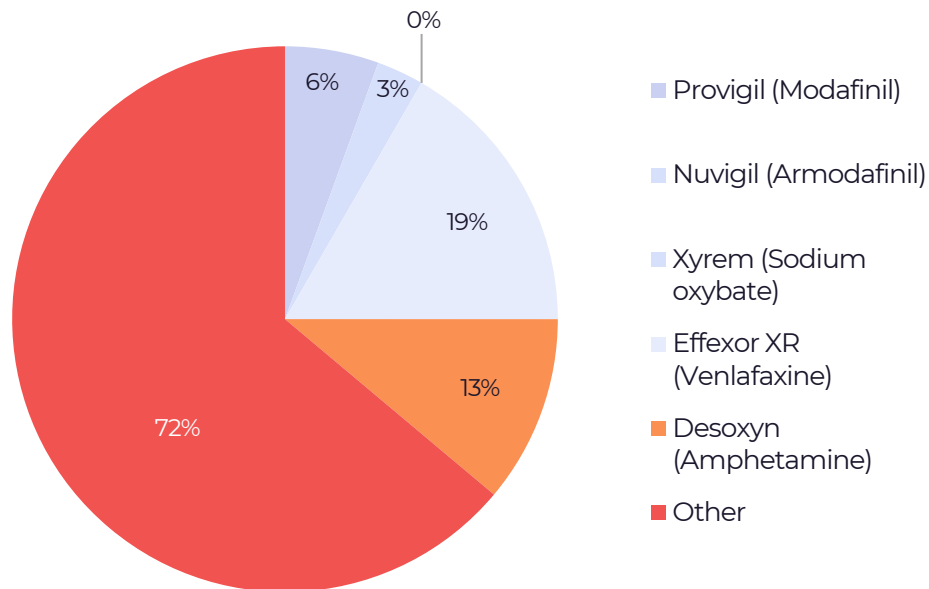
Which of the following methods have you tried to manage your symptoms?
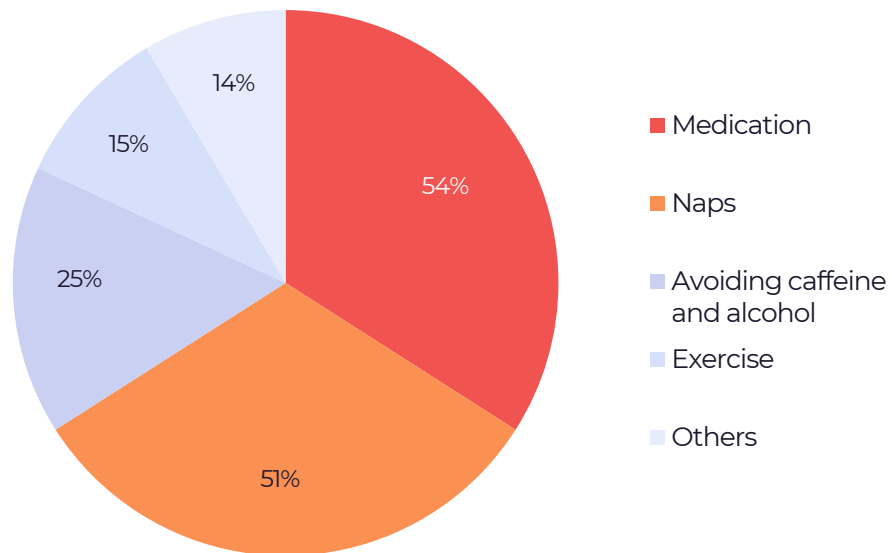
- Medication
- Naps
- Avoiding caffeine and alcohol
- Exercise
- Others

Key Findings

- Captured responses from all leads

- Respondents were asked to check all that applied

- More than 50% of respondents depended on medication to manage their symptoms

- Similarly, **50% of respondents resorted to taking naps throughout the day**

Which of the following medications have you taken to manage your symptoms?

0%
6%
3%
19%
72%
13%

- Provigil (Modafinil)
- Nuvigil (Armodafinil)
- Xyrem (Sodium oxybate)
- Effexor XR (Venlafaxine)
- Desoxyn (Amphetamine)
- Other

Key Findings

- Of the respondents who took medication to manage their symptoms, nearly 72% took medication that may not be intended to treat sleep disorders

Have you been diagnosed with any of the following?

Legend:
- Narcolepsy
- Narcolepsy with Cataplexy
- Chronic Fatigue
- Obstructive Sleep Apnea
- None of these

Pie chart values: 0%, 3%, 20%, 39%, 46%
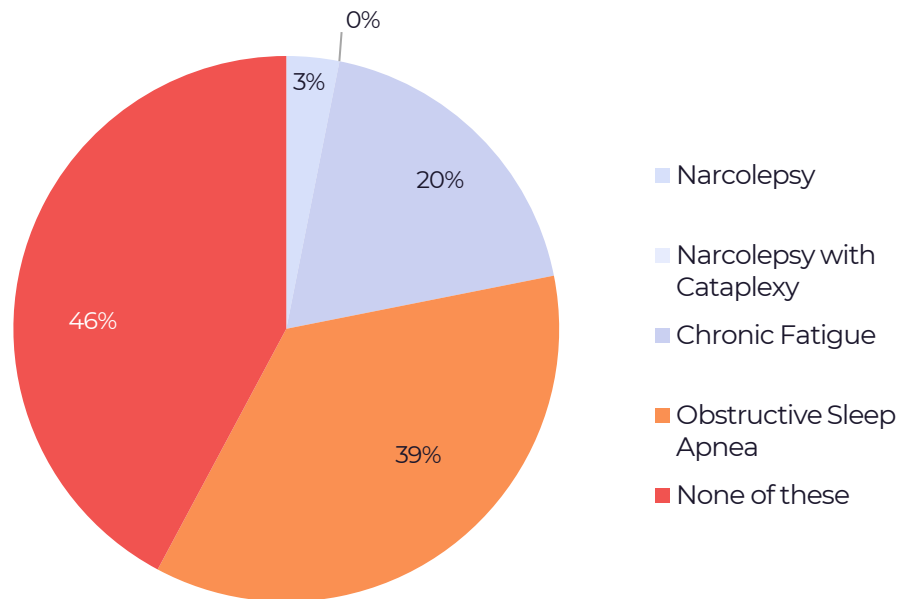
Key Findings

- Captured responses from all leads

- Nearly 46% of respondents have not been diagnosed with any common sleep disorder

- Of all sleep disorders, Obstructive Sleep Apnea was the most prevalent, affecting roughly 39% of the respondents
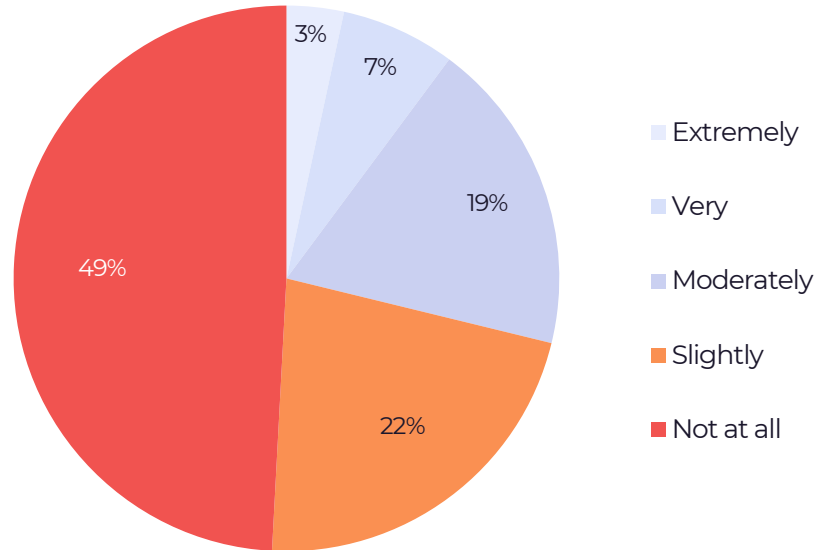
How much do you trust your diagnosis?

- 34% — Very
- 37% — Somewhat
- 29% — Not at all
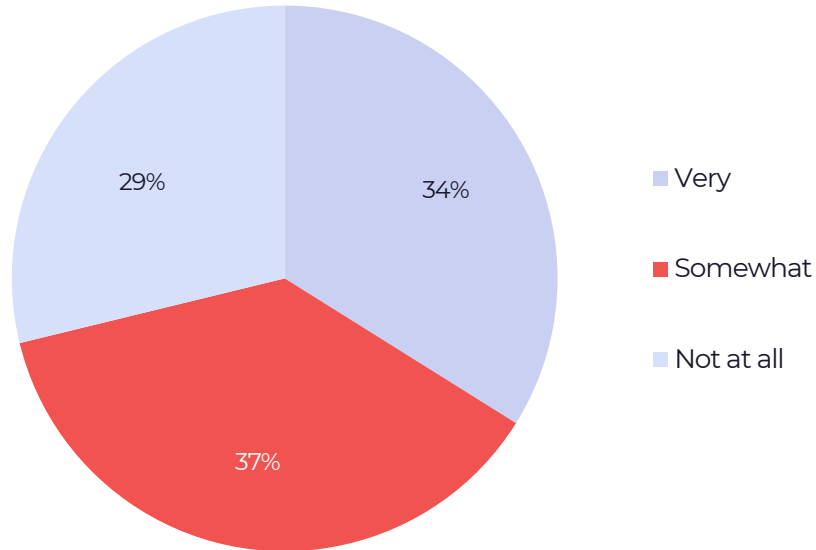
Key Findings

- Captured responses from all leads

- Majority of the respondents were doubtful about the accuracy of their diagnosis

83bar

How satisfied are you with your current treatment plan?

- Extremely
- Very
- Moderately
- Slightly
- Not at all

3%
7%
19%
49%
22%

Key Findings

- Captured responses from all leads

- Alarmingly, 49% of the respondents were not at all satisfied with their current treatment plan

83bar

Which best describes you when thinking about a new medication that could help manage your symptoms?

- 2%
- 34%
- 64%

■ I want to take this as soon as possible

■ I want more information first

■ I am not interested and would prefer my current treatment plan
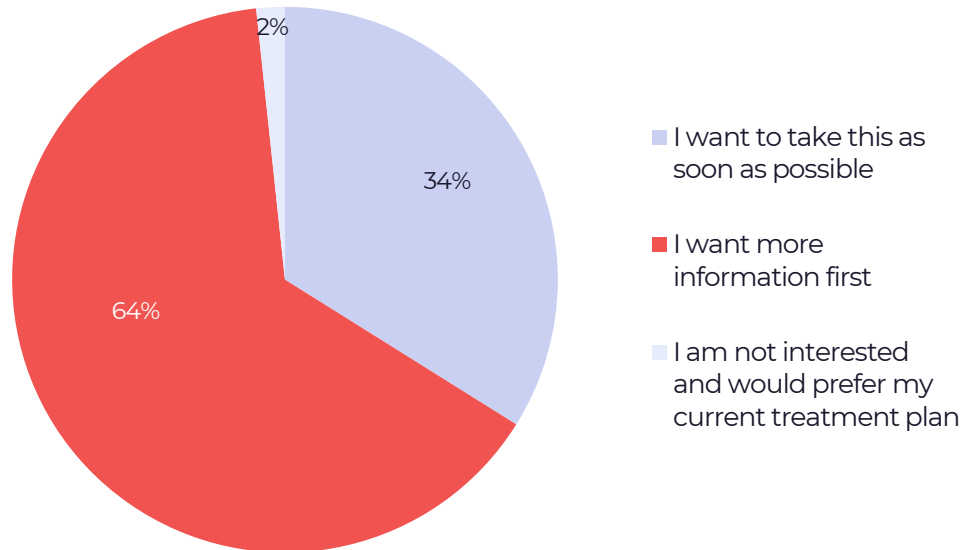
Key Findings

- Captured responses from all leads

- Majority of the respondents (64%) are interested to learn about new treatment options

How comfortable are you with talking to your doctor about new medications with regard to your treatment plan?

- Extremely — 31%
- Very — 39%
- Moderately — 14%
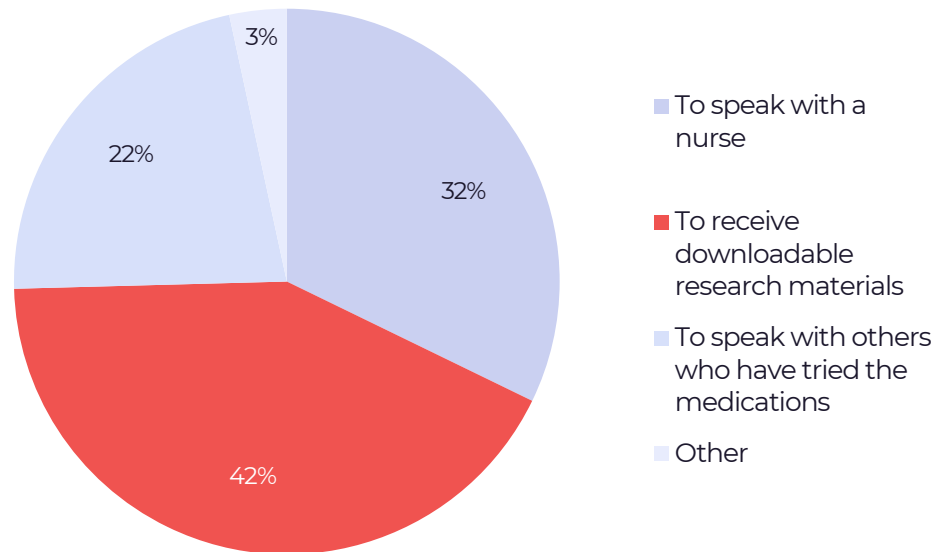- Slightly — 10%
- Not at all — 7%
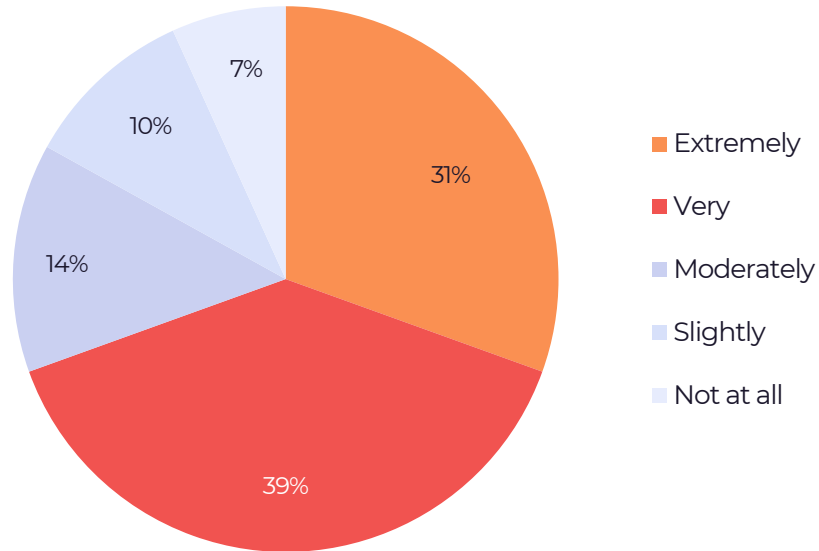
Key Findings

- Captured responses from all leads

- Majority of respondents are very comfortable with talking to their doctors regarding new treatment options for their condition

83bar

To better prepare you for a conversation with your doctor about new medications with regard to your treatment plan, which would you find most helpful?

- 32% — To speak with a nurse
- 42% — To receive downloadable research materials
- 22% — To speak with others who have tried the medications
- 3% — Other

Key Findings

- Captured responses from all leads

- Majority of the respondents prefer to receive downloadable PDFs or other research materials to help them introduce new treatment options to their doctors

83bar

Who are you taking this quiz for?

2%

98%

■ Myself
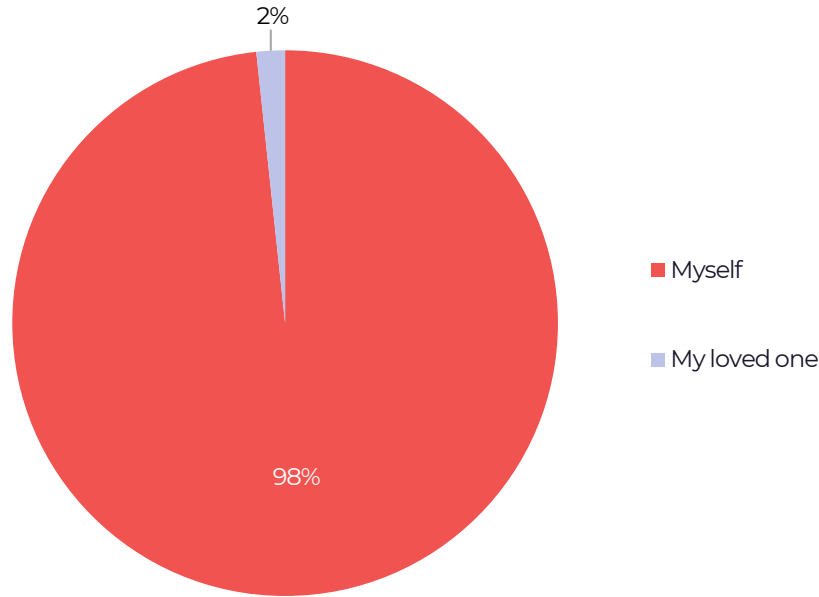
■ My loved one

Key Findings

- Captured responses from all leads

- Nearly 100% of respondents took this survey for themselves and not for a loved one

- Survey respondents themselves may be suffering from sleep disorders

Profile

- Male and Female, Ages 18 to 65
- Undiagnosed; likely not seeing a sleep specialist
- Probably taking medication not suitable for sleep disorders

Narcoleptic patients complain of excessive daytime sleepiness due to problems sleeping at night. They can suddenly doze off in the middle of an activity, which can be annoying or dangerous. They may also have issues with their memory, attention span, and energy levels.

Most Common Symptoms

- **Extreme daytime sleepiness**
- **Cataplexy or muscle weakness**
- **Hallucinations**
- **Sleep paralysis and nightmares**

Their daily functions are extremely impacted by this condition since they constantly fall asleep during the day.

They are not satisfied with their current treatment plan and are very interested to learn about new treatment options available. They are also willing to share these options with their doctors, provided the right information from reliable research materials.

Key findings

46%	**81%**	**98%**	**49%**
experienced daytime sleepiness	had disrupted nighttime sleep	directly suffer from the symptoms	are not satisfied with current treatment plan

- Only 2 out of 59 respondents (3.39%) have been diagnosed with narcolepsy

- Majority (46%) who experience similar symptoms have not been diagnosed with a sleep disorder

- The daily lives of 46% of the respondents have been severely impacted by their symptoms, while all of them have been impacted in one way or another

- 54% use medication of some kind to manage their symptoms, while 51% resort to taking naps

- 64% want more information on new treatment options available

- 39% have expressed willingness to share information about new treatment options with their doctors

83bar

Conclusions

- Diagnostic delay of >10 years

- Frequent misdiagnosis (lack of recognition of signs and symptoms; no easily measured biomarkers)

- Patients acknowledge sleep "instability", but…

- Believe to be "normal" what is actually a rare, chronic, and debilitating disease

- Reaching these patients requires getting their attention by talking to them using their words (within the restrictions of the approved label)

- Challenges:

  - Getting these patients into the top of the "funnel"

  - Education is critical to counter lack of awareness of disease and treatment options

  - Retention of those reached will require human intervention and empathy