

Market Report

# Migraine Headache





## The information contained in this presentation will assist:

- Operators of healthcare services focused on treating migraine headaches
- Migraine researchers
- Clinical trials focused on migraine patient enrollment
- Marketing managers with products or services in the migraine market
- Brand managers in the migraine market
- Direct to patient marketers in the migraine market

## Objective

- Conduct market research to better understand migraine patients
- Utilize Facebook ads to attract research participants and direct them to a dedicated landing page and survey

## Key Metrics

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

## Definition of a Qualified Lead

- Adults age 18 + with recurring migraine headaches

## Campaign Assets

- 3 ad concepts to attract migraine patients
- 9 total ad variants (three per concept)
- 1 unique landing page with embedded survey
- 1 market research survey designed to connect with migraine patients
- 1 thank you landing page with downloadable migraine pain support guide



## Process

### Creative Development

- To attract migraine patients, we produced 3 concepts with 3 visual variants each under the following themes:
  - Altruism: Help us understand migraine sufferers. Take a short survey.
  - Scientific research: Advance migraine research and treatment. Provide feedback.
  - Humor: Does this look like a normal headache?

### Set Up Ad Targeting & Launch

- Target men and women in the United States, age 25-65, via paid Facebook newsfeed ads

### Measure Results

- Determine CPL for three concepts, qualified leads generated by each concept, and analysis of survey responses

## Results

- Determined winning messaging concept to attract potential patients
- Captured willingness to share information
- Refined understanding of migraine patients

### Acquisition Metrics

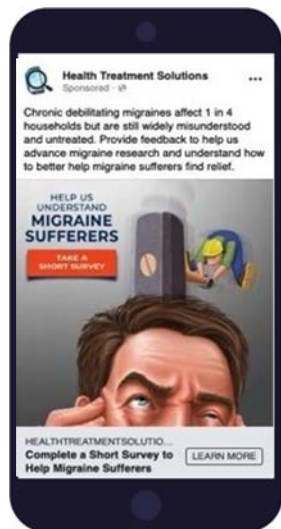
- Nationwide ad spend
- 237 total leads (a.k.a. survey completions)
- 100% of leads were qualified
- Sub \$10 CPL (avg. Cost Per Lead)



# Attract patients who need treatment

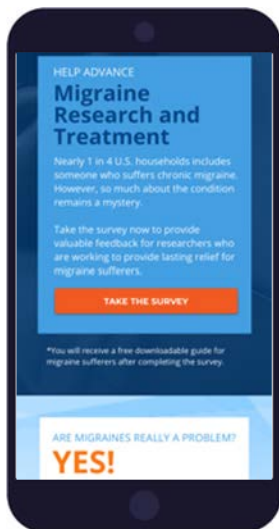
Optimized to ensure high consumer engagement

## Social Media



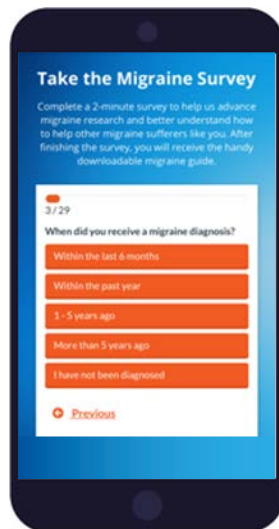
Attract

## Landing Page



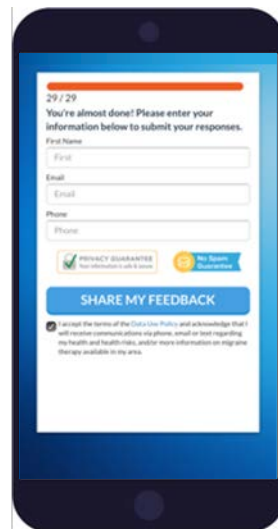
Engage

## Symptoms



Qualify

## Submit



Collect

## Our Goals



Generate clicks with illustrated ads that stand out in social newsfeed

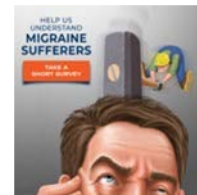
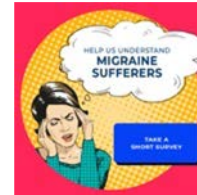


Optimize percentage of respondents who complete survey with engaging experience

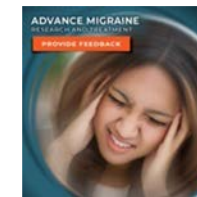
## Methodology

- Developed three creative concepts to generate demand
- Each concept included three unique images and one unique headline
- The three headlines conveyed: altruistic, scientific research, and humorous messaging
- Each ads featured the same variant copy and pointed to the same landing page
- Leveraged Facebook's algorithm to optimize ad delivery based on highest conversion rate
- Determined winning concept based the most qualified survey completions

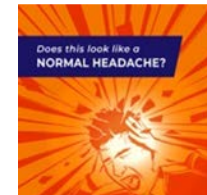
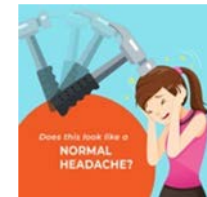
## Image Assets Tested



**Altruistic**



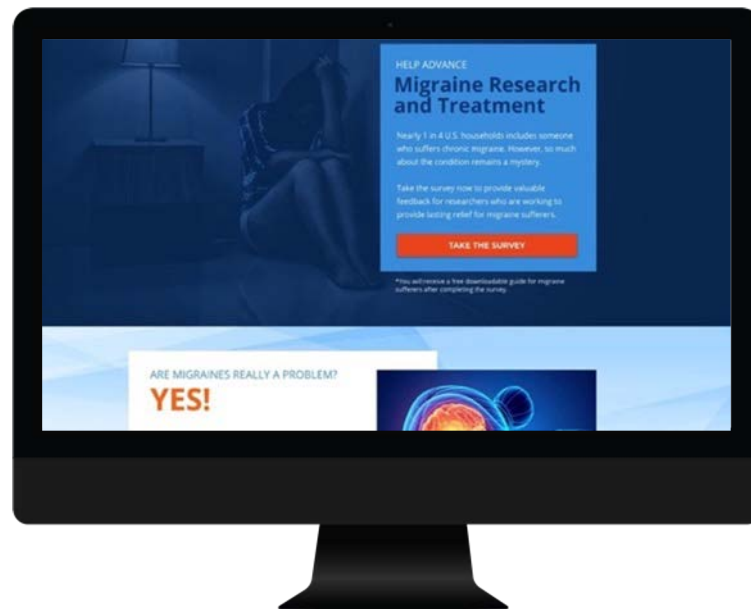
**Scientific Research**



**Humorous**

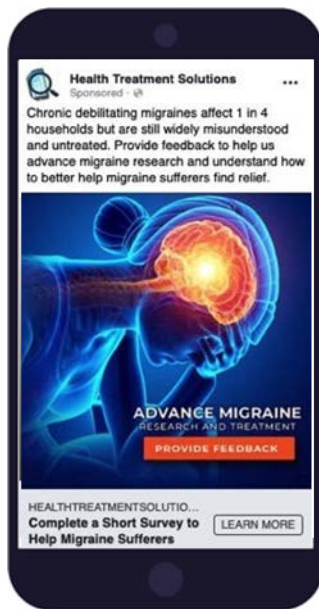


Facebook Ad

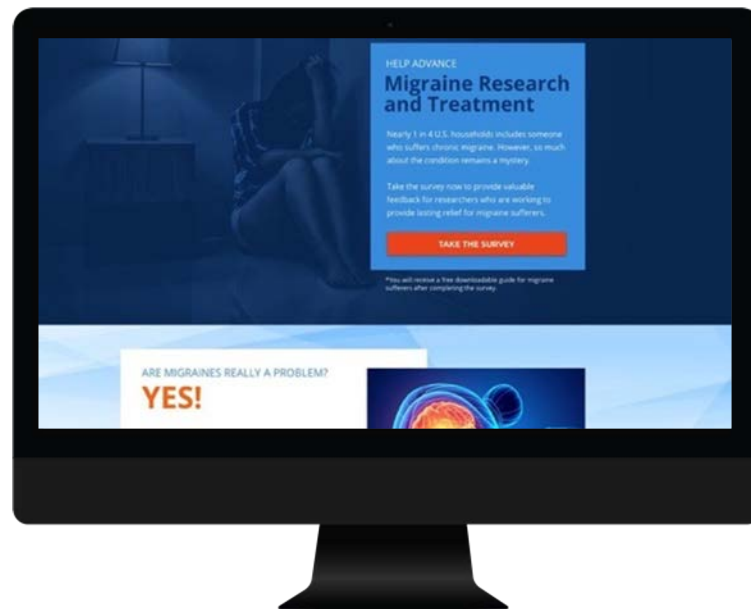


Landing Page



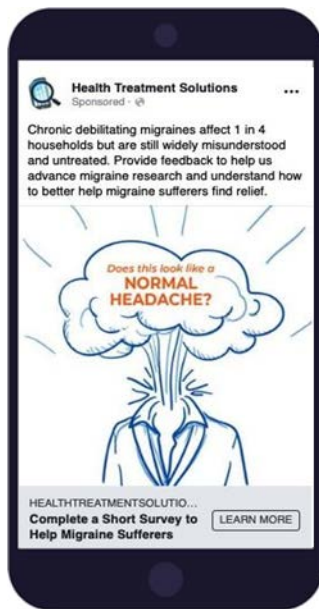


Facebook Ad



Landing Page





Facebook Ad



Landing Page

## Key Findings

- Two best performing images featured the altruistic message and visually connected to patient symptoms
- 65% of leads were generated by the altruistic ad concept
- 22% of leads were generated by the humorous ad concept
- 13% of leads were generated by the scientific ad concept

## Image Assets Tested

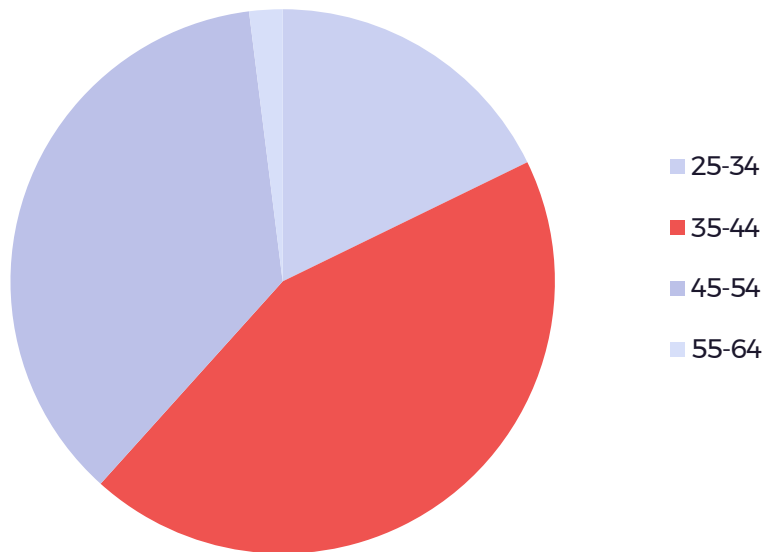


**#1 top performing ad**



**#2nd top performing ad**

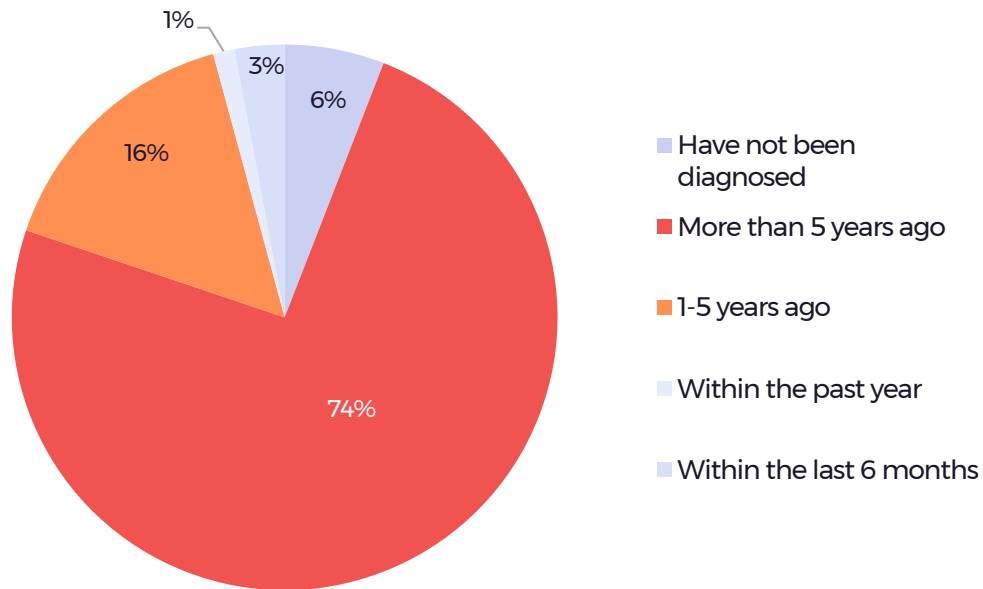
## Please select your age group



## Key Findings

- Captures responses from all leads
- **93% of leads are female**
- At 42%, the 35-44 age category received the most responses

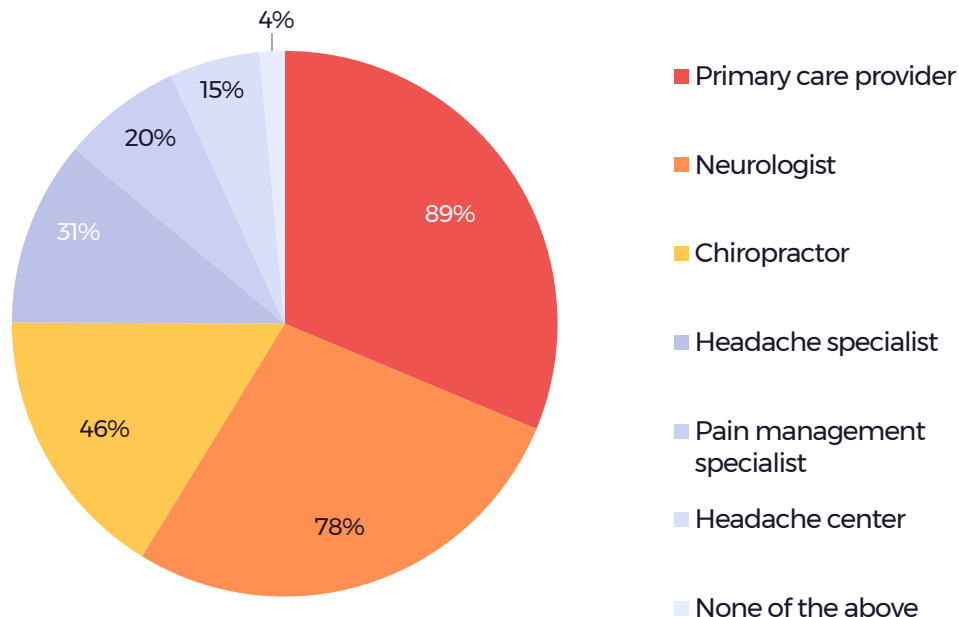
## When did you receive a migraine diagnosis?



## Key Findings

- Captures responses from all leads
- More than **74% of respondents have been suffering from migraines** for more than five years
- **Only 5.91% of respondents have not been diagnosed with migraine**

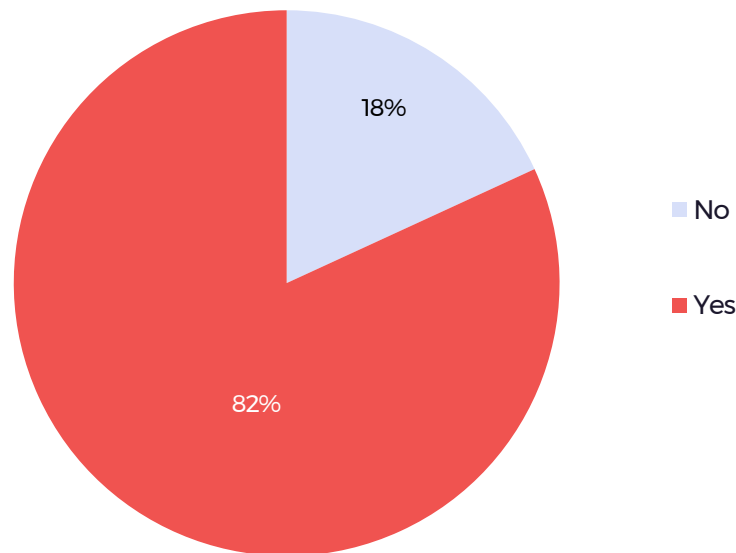
## Have you ever seen any of the following for migraine treatment?



## Key Findings

- Captures responses from all leads
- Respondents were asked to select all that apply
- The majority of respondents have received migraine treatment from a PCP or neurologist
- **Over 46% of respondents have also received migraine treatment** from a chiropractor

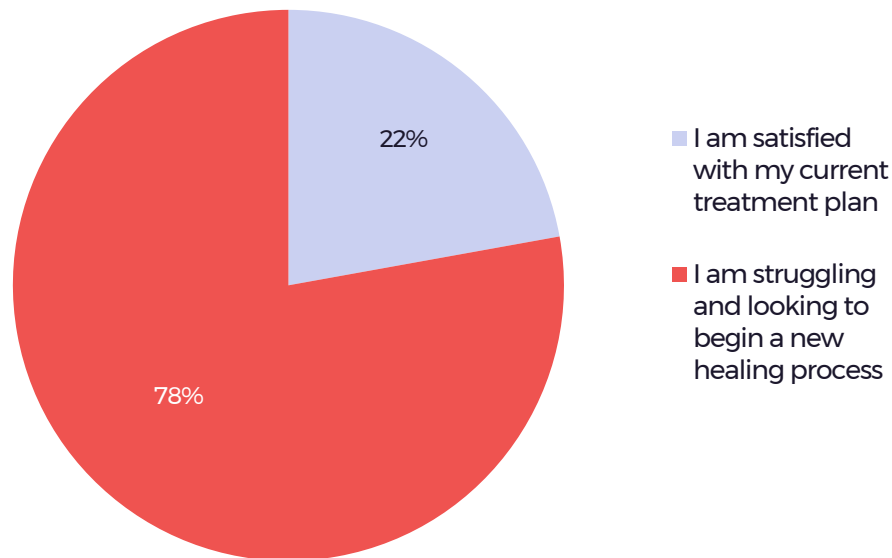
## Are you currently receiving medical care for migraine treatment?



## Key Findings

- Captures responses from all leads
- Respondents that answered “yes” were next asked whether or not they are satisfied with their current treatment plan – **over 77% expressed dissatisfaction**
- Respondents that answered “no” were next asked to identify the barriers to treatment – **over 39% said previous treatment has not helped**

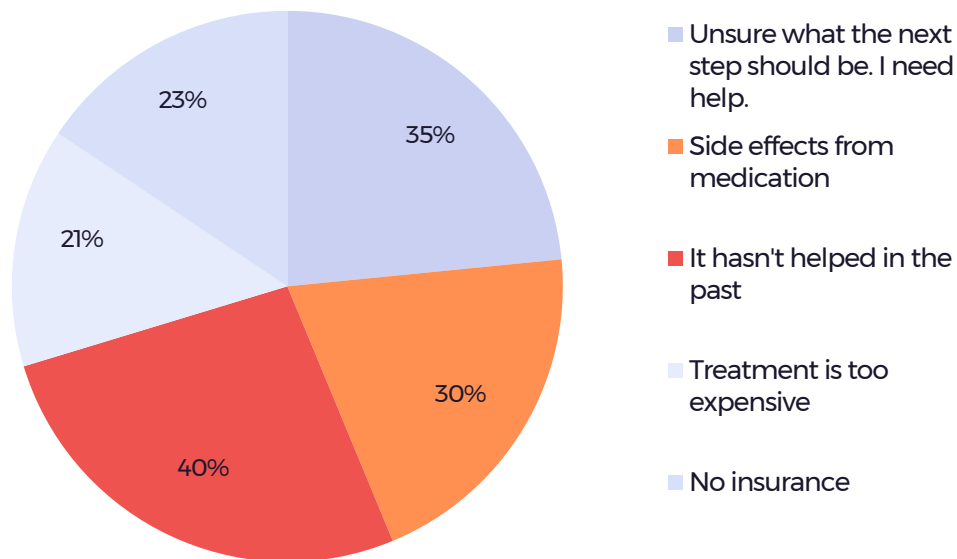
## How satisfied are you with your current treatment plan?



## Key Findings

- Captures responses from all leads
- This is the follow up question for respondents that answered “yes” they are currently receiving medical care
- **Over 77% expressed dissatisfaction with their current treatment plan**

## What prevents you from seeking medical treatment?

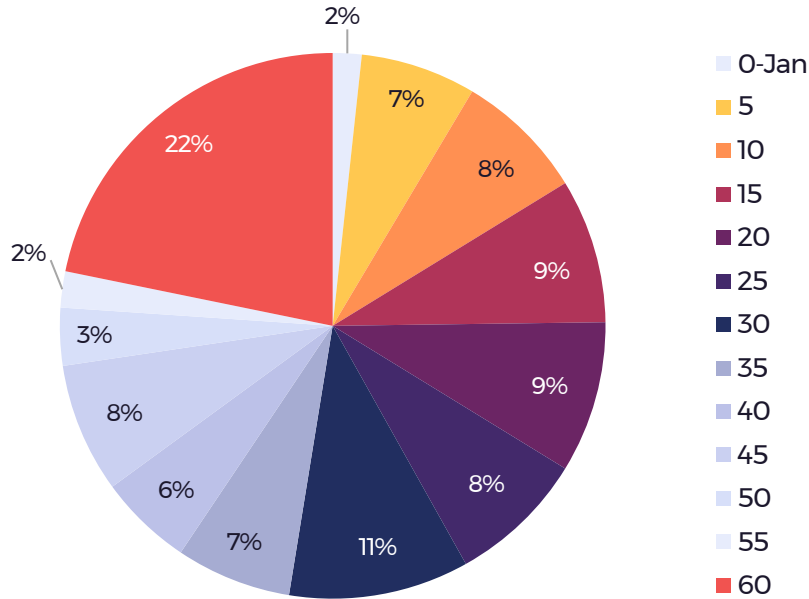


## Key Findings

- Captures responses from all leads
- This is the follow up question for respondents that answered “no” they are not currently receiving medical care
- Over 39% say that previous treatment was not helpful
- Over 34% are unsure what their next step should be and need help finding treatment



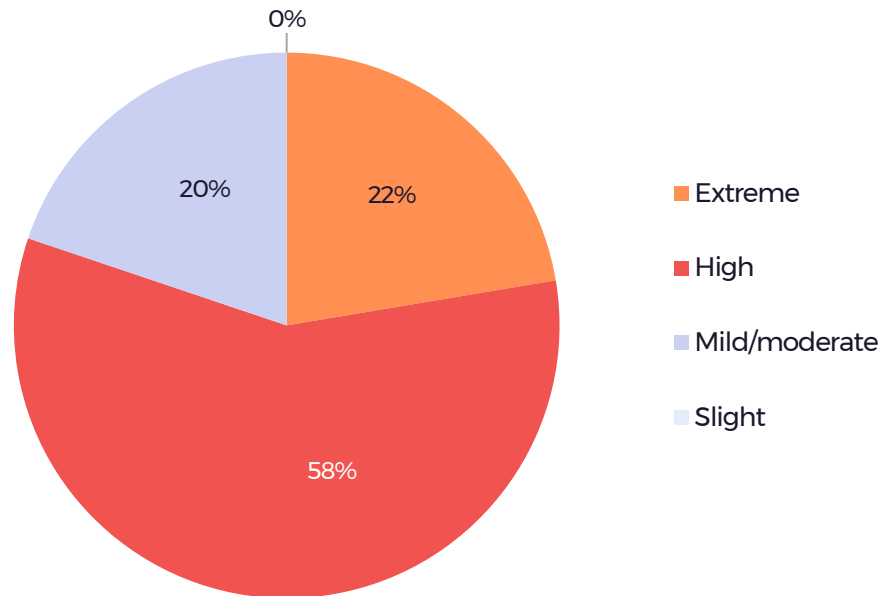
## Over the last three months, how many headaches have you experienced?



## Key Findings

- Captures responses from all leads
- To identify the number of respondents that are potentially chronic migraine patients, we asked them to identify how many headache days they experience
- Chronic migraine occurs on 15 or more days per month for more than three months, which, on at least eight days per month has the features of migraine headache

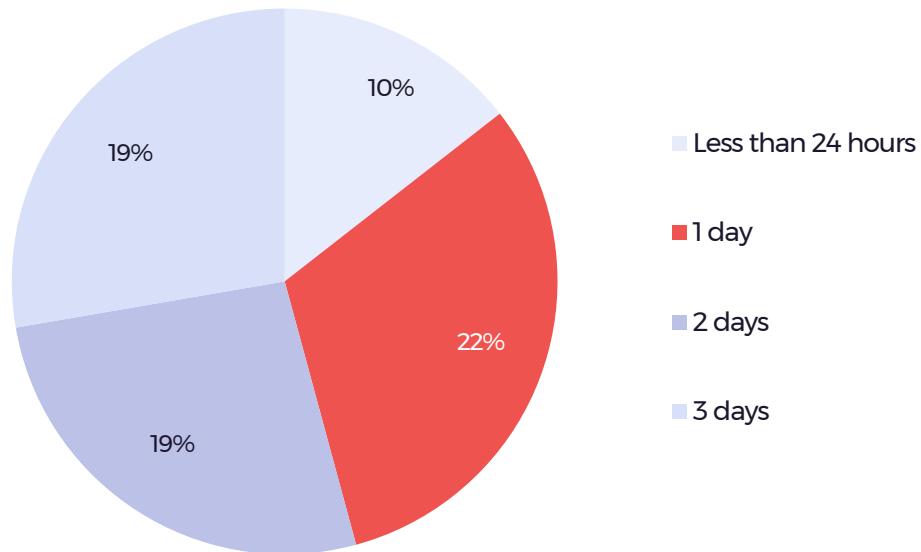
## On average, how do you rate your headache pain?



## Key Findings

- Captures responses from all leads
- The majority of respondents rate their headache pain as “high”

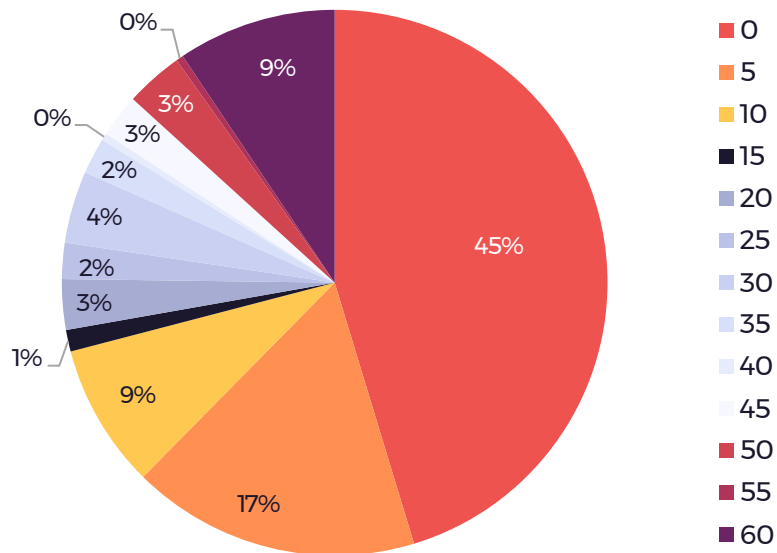
## On average, how long does a headache last?



## Key Findings

- Captures responses from all leads
- To determine the severity of migraine attacks, we asked respondents to identify how long their headaches last
- By definition, **a migraine usually lasts from 4 to 72 hours**

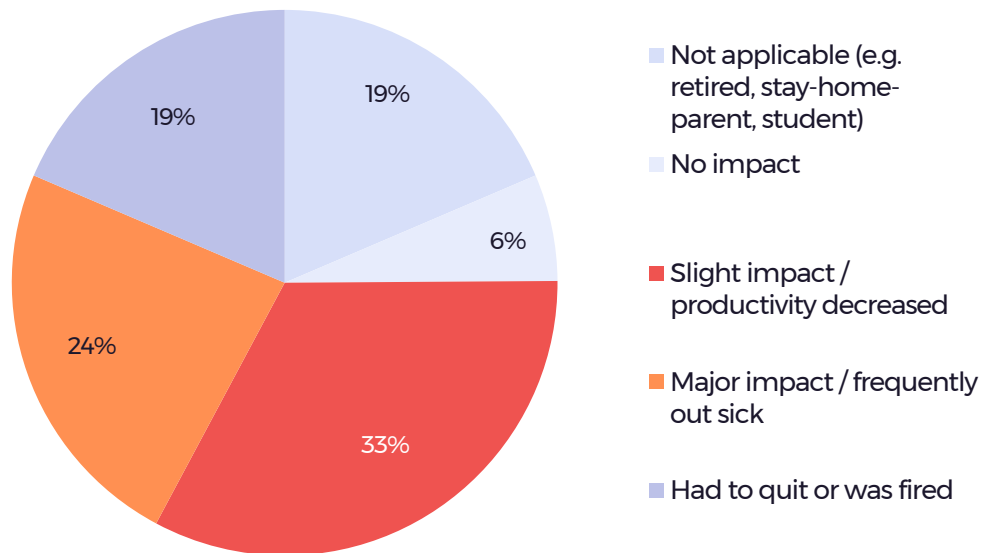
## Over the last three months, how many days did you miss work or school because of your headaches?



## Key Findings

- Captures responses from all leads
- The majority of respondents do not miss work or school as a result of their migraine; however, our findings show those that do miss work often experience decreased productivity or unemployment

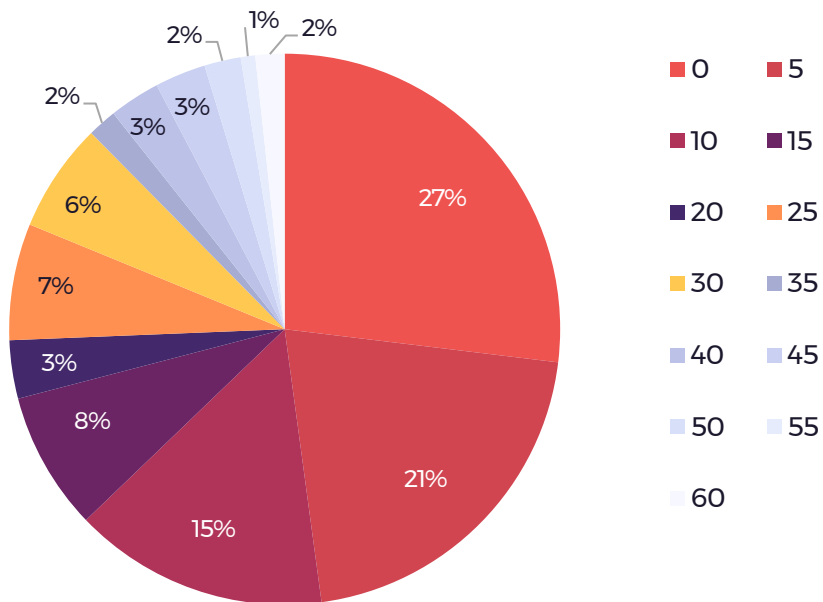
## What impact have your migraines had on your job?



## Key Findings

- Captures responses from all leads
- In varying degrees, the majority of respondents indicate migraines have had some impact on their job
- A 2018 study found migraine patients had almost two times the odds of having a short-term disability claim than non migraine patients

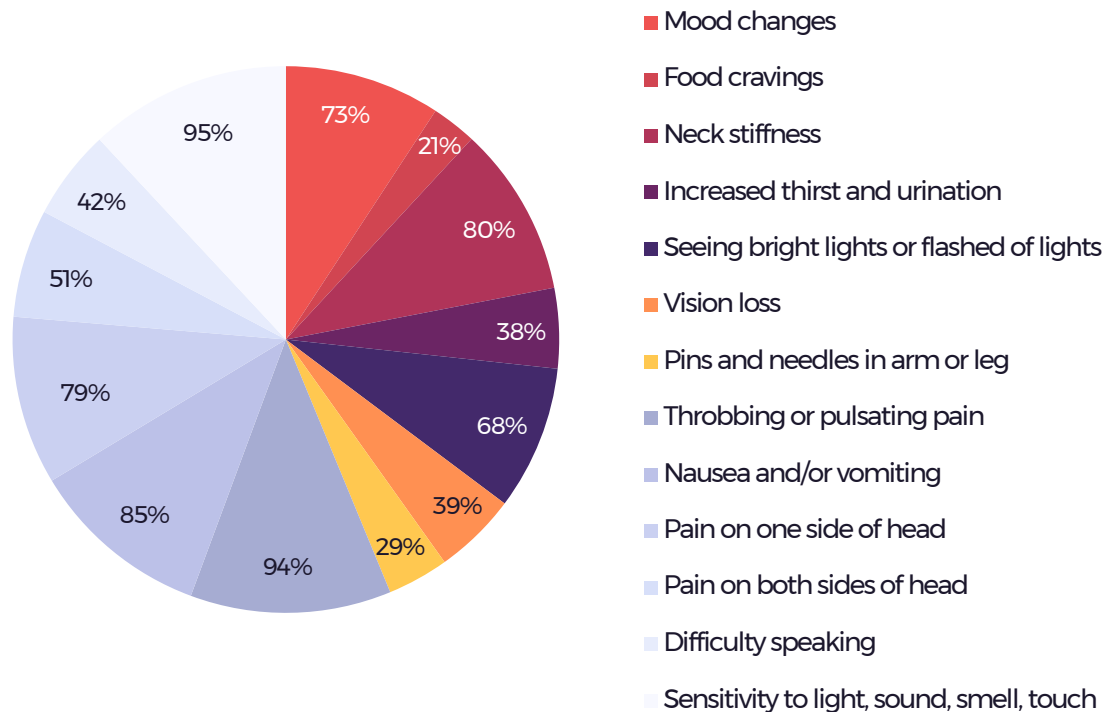
## Over the last three months, how many times did you miss family or social events because of your headaches?



## Key Findings

- Captures responses from all leads
- For many, migraine impacts their quality of life
- Our findings show that migraine sufferers are more likely to miss a family or social event than be absent from work or school

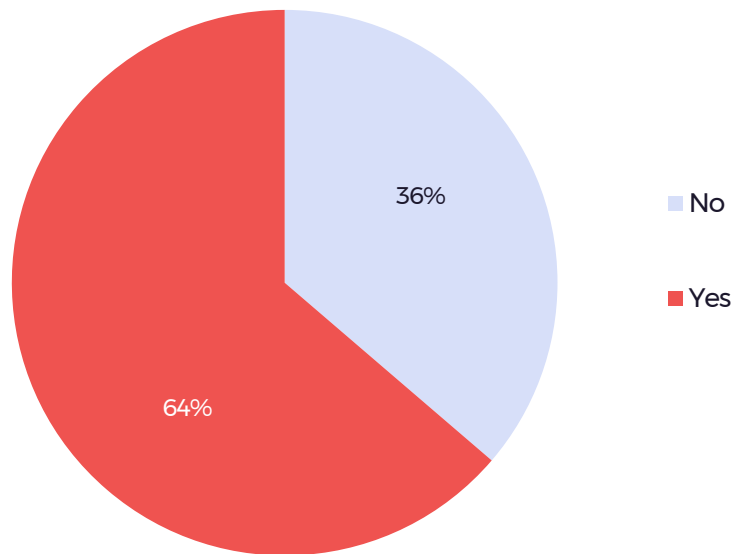
## Which headache symptoms do you usually experience?



## Key Findings

- Captures responses from all leads
- Respondents were asked to check all that apply
- Almost all respondents indicated they experience sensitivity to light, sound, smell, or touch as well as throbbing or pulsating pain
- Over 84% of respondents also experience nausea and/or vomiting

## Do you have a family history of migraines?

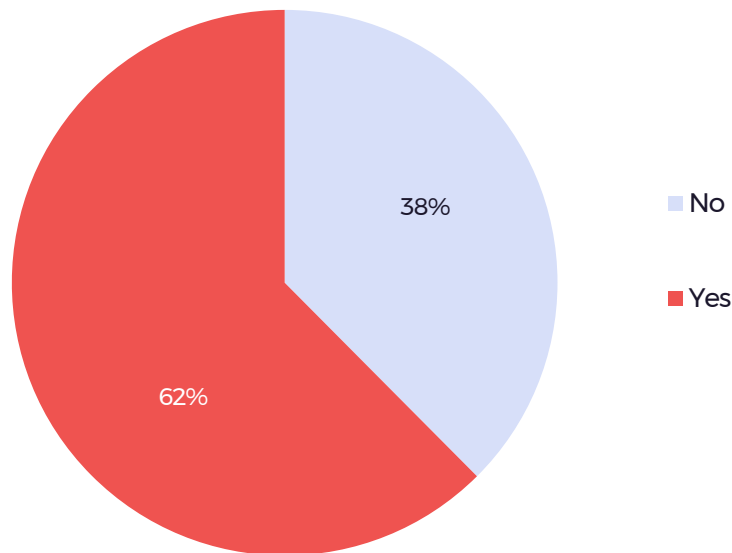


### Key Findings

- Captures responses from all leads
- The majority of migraine sufferers have a family history of migraine



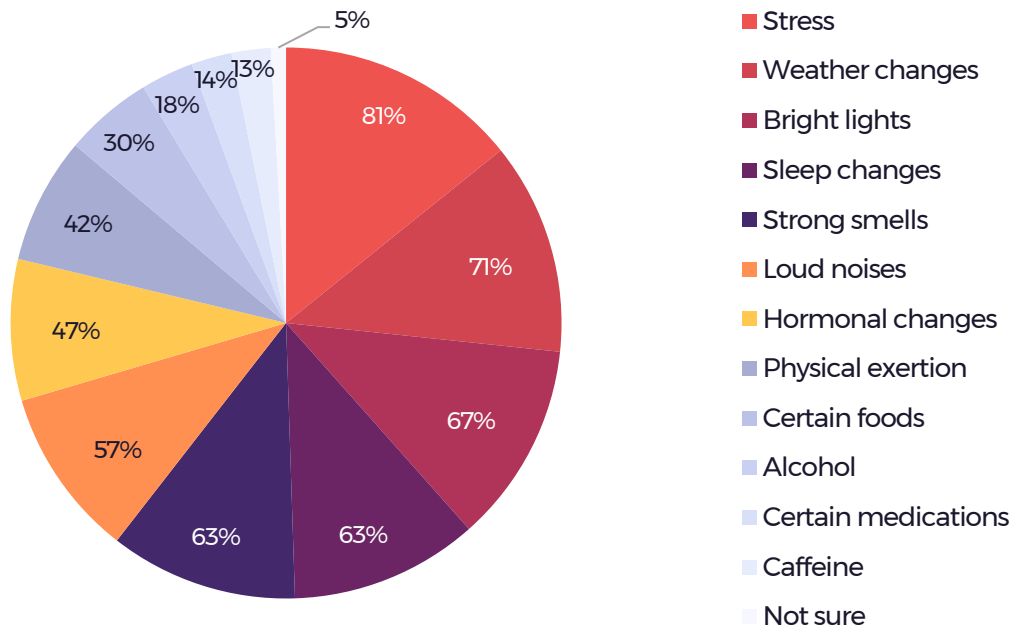
## Can you usually predict when a migraine is coming on?



## Key Findings

- Captures responses from all leads
- Premonitory symptoms (PSs) of migraine are those that precede pain in a migraine attack
- Studies suggest that treatment during this phase may prevent the onset of pain

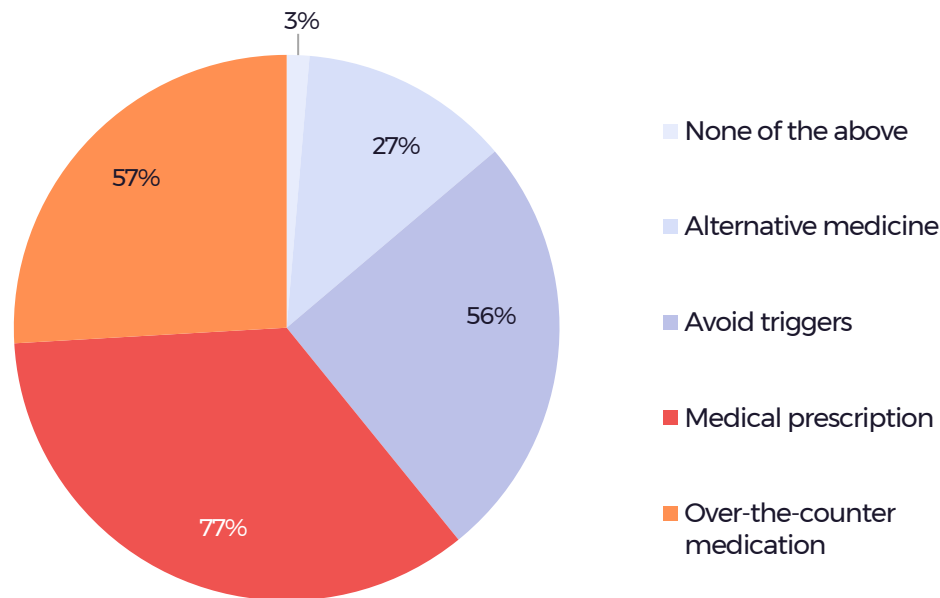
## What usually triggers your migraine?



## Key Findings

- Captures responses from all leads
- Respondents were asked to check all that apply
- Survey results indicate stress is the top migraine trigger and weather changes is the second
- **81% of respondents indicated stress triggered their migraine**

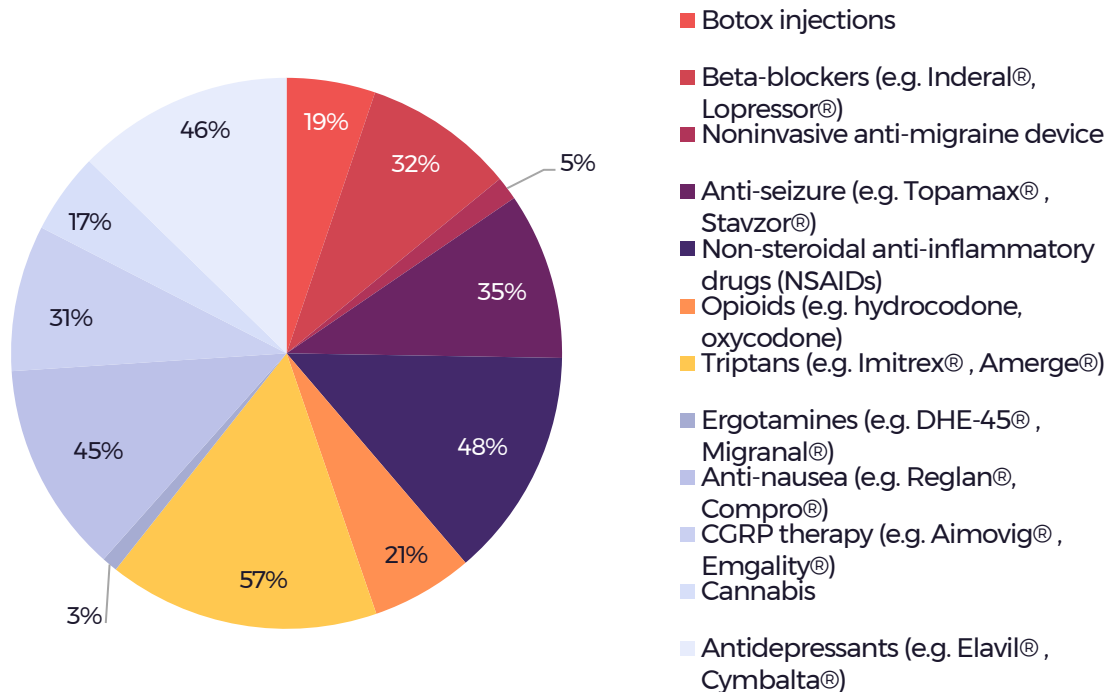
## How are you currently managing your migraines?



## Key Findings

- Captures responses from all leads
- Respondents were asked to check all that apply
- The majority of patients have a medical prescription for migraine
- Respondents with a medical prescription were also asked to identify which medical prescription they use

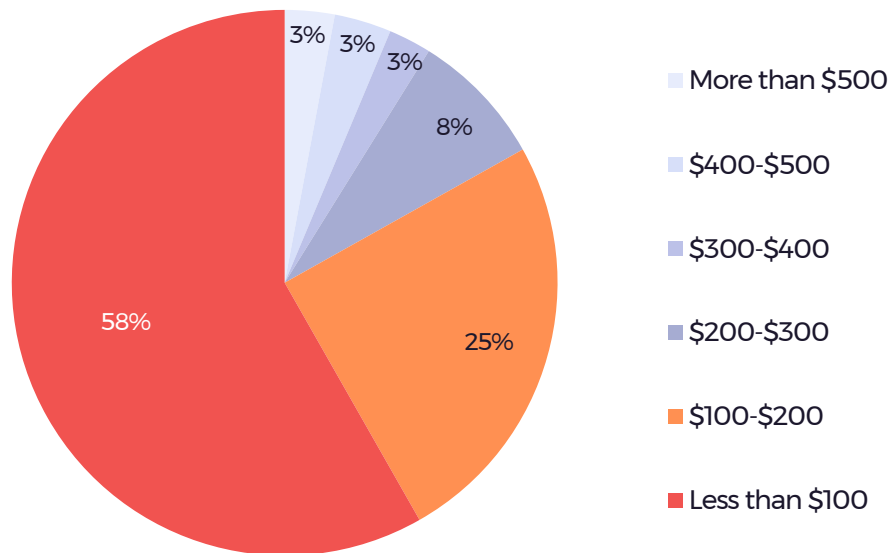
## Which medical prescription do you use?



## Key Findings

- Captures responses from all leads
- Respondents were asked to check all that apply
- Over 57% of respondents indicated they use triptans to treat migraine
- Over 48% use NSAIDs
- A 2018 study found that migraine patients were two times more likely than non-migraine patients to use opioids

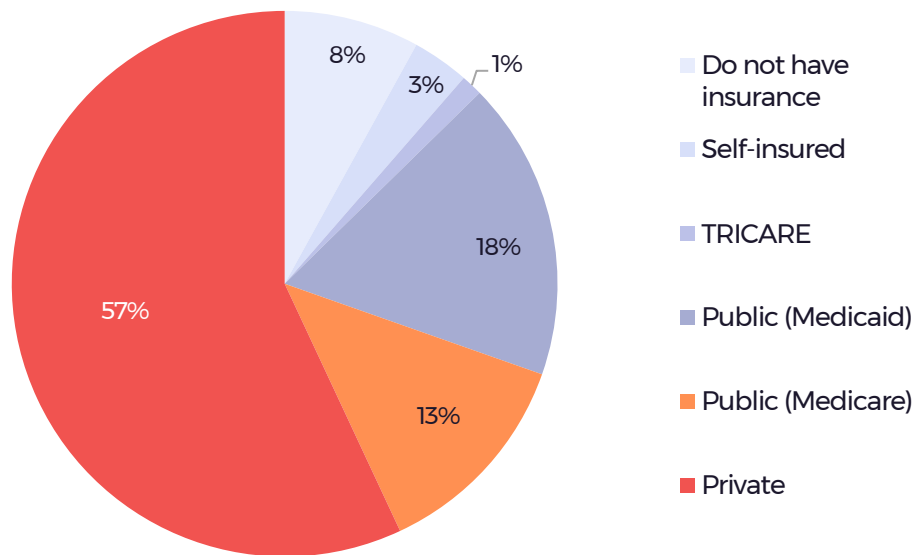
## On average, how much do you spend each month on headache treatments?



## Key Findings

- Captures responses from all leads
- A 2018 study found that migraine patients' mean annual direct all-cause healthcare costs were \$6,575 higher than those of matched patients without migraine

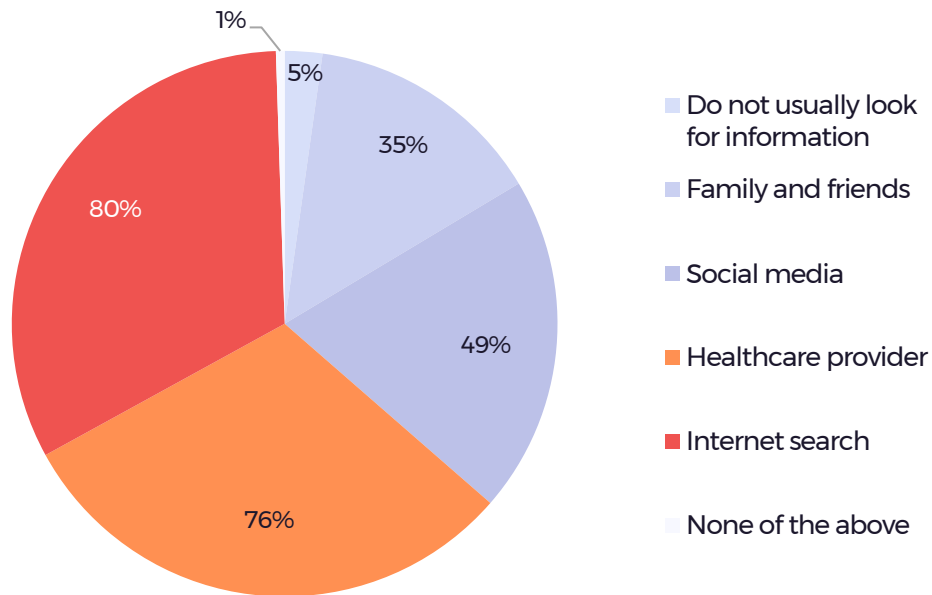
## What is your primary insurance type?



## Key Findings

- Captures responses from all leads
- Nearly 57% of respondents indicated they are privately insured
- Nearly 31% have public insurance (Medicare or Medicaid)
- 11% are self-insured or do not have insurance

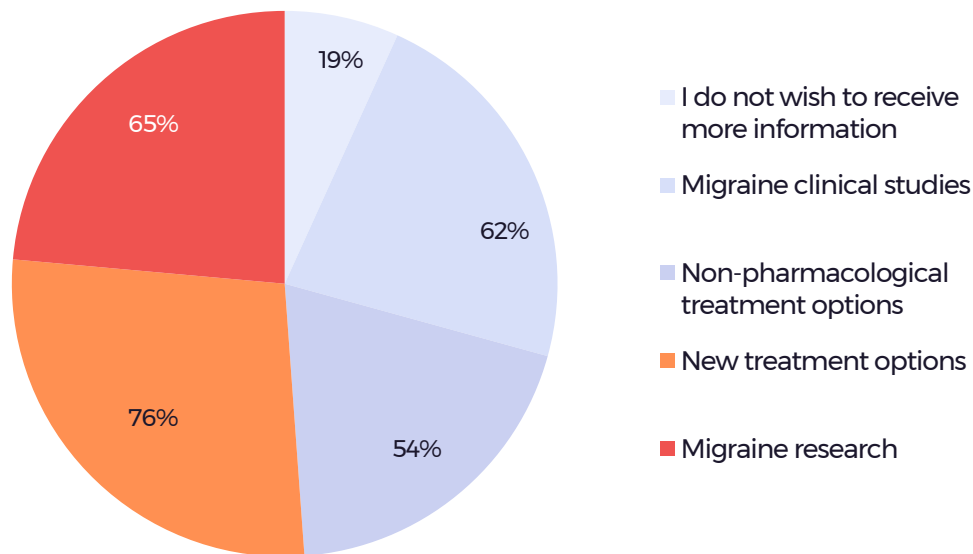
## Where do you find information about migraines?



## Key Findings

- Captures responses from all leads
- Respondents are more likely to rely on information found online through internet searches and social media

## If we learn about new migraine therapy options, may we contact you about any of the following?



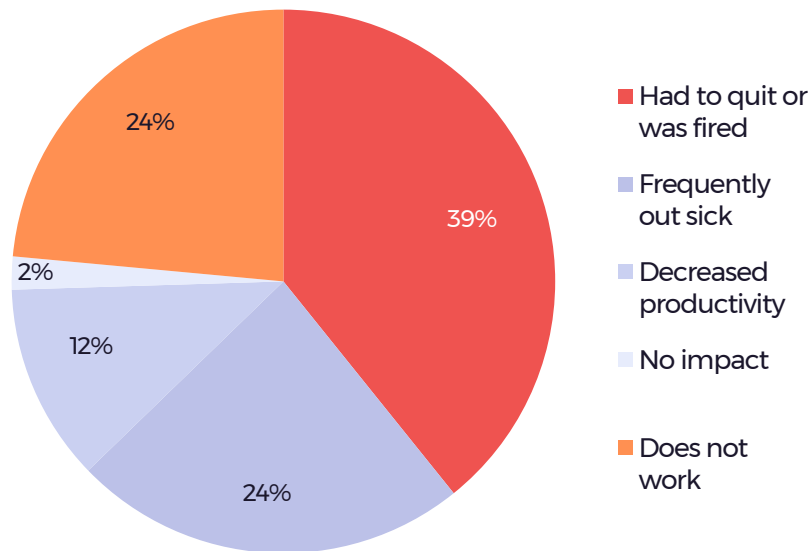
## Key Findings

- Captures responses from all leads
- Check all that apply
- Overwhelmingly, the majority of respondents are interested in learning about migraine treatment options, research, and clinical studies

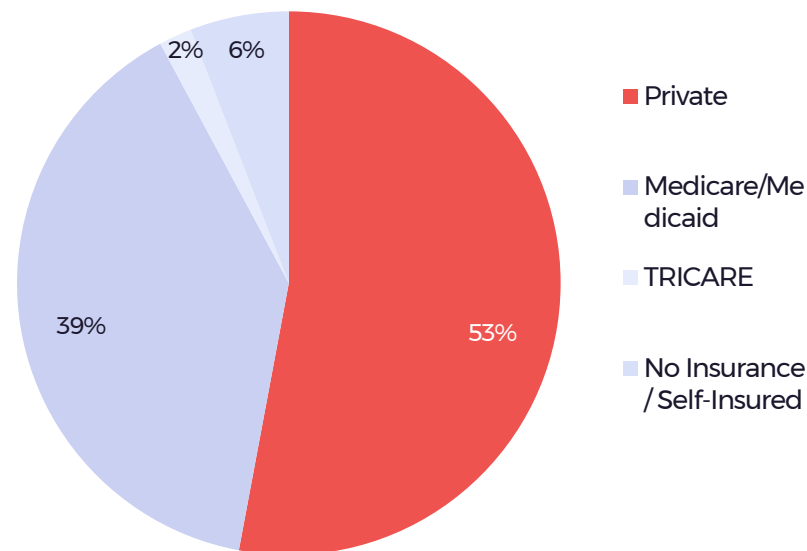


## Respondents reporting 60 headaches over three month period

### Job Impact



### Insurance Type





## Profile

- Female / Age 35-44
- Family history of migraine
- Diagnosed more than five years ago
- Private health insurance

She experiences migraines several times a month, and each attack lasts at least one day. This causes her to lose productivity at work, and she worries about the impact her migraine attacks are having on her job.

## Most Common Symptoms:

- **Throbbing and pulsating pain**
- **Sensitivity to light, sound, smell, and/or touch**
- **Nausea and/or vomiting**

## Most Common Symptoms:

- **Stress**
- **Weather changes**
- **Bright lights**

She receives treatment from her PCP, and manages her pain with prescription medication like triptans, NSAIDs, or antidepressants. But she is not completely satisfied with her current treatment plan and is conducting online research for new treatment options.

## Key Findings

- Of the 237 people surveyed, 93% of respondents are female
- 42% of respondents are age 35-44
- More than 74% of respondents have been suffering from migraines for more than five years
- 89% respondents have received migraine treatment from a PCP and 78% from a neurologist
- 81% of respondents are currently under medical care, of those respondents, over 77% express dissatisfaction
- 18% of respondents are not currently under medical care, of those respondents, 39% said it's because previous treatment has not helped
- Almost 22% of respondents experienced 60 days of headaches over a three month period
- 57% rate their headaches high on the pain scale and most headaches last at least one day and longer
- The majority of respondents report that migraine headaches impact their job, with 18% reporting loss of employment
- Almost all respondents experience sensitivity to light, sound, smell, or touch as well as throbbing or pulsating pain
- Over 84% of respondents also experience nausea and/or vomiting
- The majority of respondents have a medical prescription for migraine treatment
- 57% of respondents indicated they use triptans to treat migraine and over 48% use NSAIDs
- Nearly 57% of respondents indicated they are privately insured, 31% have public insurance, and 11% are self-insured or do not have insurance
- The majority of respondents are interested in learning about new migraine treatment options, research, and clinical studies

## Conclusions

- Migraine sufferers are likely to experience diminished quality of life. Recurring pain frequently interferes with their career, education, and family events; yet nearly 6% of survey respondents are undiagnosed. Barriers to treatment include cost, history of ineffective treatment, lack of insurance coverage, and uncertainty about which steps to take to begin treatment.
- Migraine is not one-size fits all and affects people in different ways. The majority of survey respondents experience pulsating or throbbing pain, sensitivity to external stimuli, and nausea. However, many also experience symptoms such as neck stiffness, changes in mood, and seeing bright spots of light. Respondents also experience headaches at varying frequencies, duration, and level of pain.
- Due to decreased satisfaction with current treatment options, migraine patients are motivated to find new treatment plans.
- Targeted social-media outreach with high patient activation is a feasible approach and recommended given:
  - Competitive CPL
  - Ad concepts emotionally connect with migraine patients through creative messaging
  - Ad concepts address the stigma associated with the disease



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CEO, founder, advisor, investor and fundraiser with a particular focus on health care, technology and service sectors. Bias toward rapid growth and development while creating new market niches in technology-enabled health care and wellness fields. Currently operating 83bar, LLC. with directional strategic guidance to The Gents Place, Texas Metabolic Centers, Replenish Hydration, and ArthroKinex, Inc..



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With 83bar since inception and bringing 15 years of successful medical device direct to physician sales experience. Intimate knowledge of the barriers faced by both the patient and the physician in need of each other as they both navigate through today's everchanging healthcare insurance landscape



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