



Pressure Test Report Sleep Disorders

Sleep insufficiency, which is defined as sleeping less than seven hours a night, can be the result of mild sleeping challenges or disorders such as insomnia, narcolepsy, apnea and restless legs syndrome.

Executive Summary

Sleep Apnea

- 72% have been experiencing sleep apnea symptoms for over a year
- 64% have not seen a sleep specialist
- 49% are interested or extremely interested in seeing a tele-health sleep specialist

Narcolepsy

- Fewer than 25% are satisfied with their current treatment plan
- More than 60% want more information
- Nearly 35% are ready to take action on a new medication
- Most patients are willing to discuss a new medication with their HCP

According to the Centers for Disease Control and Prevention (CDC), more than one in three people do not get enough sleep. Rising awareness is motivating consumers to add sleep to their definition of healthy lifestyles, along with diet and exercise.

For the purposes of our market Pressure Test, we used the following definitions:

- **SLEEP APNEA** is a sleep disorder in which breathing repeatedly starts and stops
- **NARCOLEPSY** is a chronic sleep disorder that causes overwhelming daytime drowsiness

Both campaigns successfully attracted relevant respondents, with a large percentage of patients who are keen to act and want more information.

Sleep disorder patients are slow to recognize their condition, so education and encouragement matter. Here are learnings we applied to the Pressure Tests:

- Successfully generating sleep disorder leads
- Sleep disorder leads show up through other lead generation searches as well (e.g. CV patients)
- Encouraging these patients through the last steps of the funnel (recognition and taking action) will have challenges – and requires human intervention.

These results will be of interest to the ecosystem of manufacturers, retailers, health service providers, and pharmaceutical companies that have formed around sleep health.

The multibillion-dollar sleep-health economy is a response to this growing problem and our market study reveals a wide range of attractive opportunities.

[Learn about Pressure Tests - P4](#)

The growing prevalence of obstructive sleep apnea disorders, rising use of portable sleep apnea devices, growing sleep testing options, and aging population are the key factors creating growth in the market.

Sleep apnea devices are the fastest growing product category in this market. This growth is driven by technology advancements and increasing number of OSA cases.

There are a number of challenges we needed to overcome in our sleep apnea Pressure Test:

- While easy to identify symptoms, patients are slow to act
- Patients believe they will be fine if they just change behaviors (e.g. lose weight)
- Low understanding that untreated sleep apnea can significantly impact health (hypertension, stroke, arrhythmias, cardiomyopathy, heart failure, diabetes, obesity and heart attacks)
- Patients may not correlate their sleep apnea with job impairment, work-related accidents, motor vehicle crashes, or academic underachievement

Our plan

Target men and women, ages 40-65 who are experiencing symptoms or are at-risk for sleep apnea and are interested in going to a sleep specialist.

Our process

Introduce a health care survey that would capture and define current symptoms and conditions, age, duration of symptom experience (based on clinically validated Eppworth Sleepiness Scale). Conclude with willingness to try a new treatment methods.



Our Findings

Approximately 50% of respondents experience daytime fatigue or restlessness and are likely to doze while watching TV or traveling in a car. About 68% have a moderate to high chance of falling asleep while sitting and reading. More than 72% have been experiencing sleep apnea symptoms longer than one year, yet 64% have not seen a sleep specialist.

Most important, nearly half are interested or extremely interested in seeing a remote sleep specialist appointment.

Implications for Action

The results from this Pressure Test indicate how well the target prospects respond to outreach, encouragement, and treatment options.

To improve the program even further, our recommendation is to add a call screener to our RN-staffed contact center to provide additional education and guidance to patients on sleep testing.

We also see an opportunity for a tele-health partner to provide remote sleep assessment and counseling.

Finally, if recruiting for clinical trials, we can dive deeper into protocol inclusion and exclusion criteria.

Our projected patient acquisition ROI funnel

- \$325 spent on ads
- 218 total leads in target demographics
- \$1.49 CPL (Cost Per Lead)
- 109 survey fully qualified completions
- \$3.10 CPA (Cost Per Acquisition)

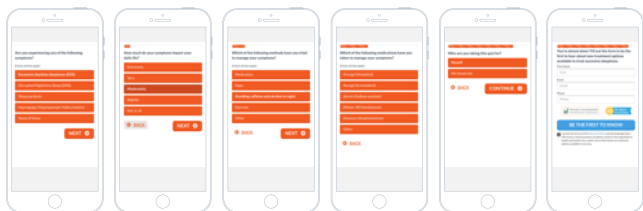
This market is challenging because of the low prevalence (about 200,000 in the US). Those dealing with narcolepsy don't easily self-identify and are a "needle in haystack."

Therefore, only 25% are diagnosed and treated, often after a long diagnostic journey of more than 10 years. This delay includes frequent misdiagnosis (lack of recognition of signs and symptoms; no easily measured biomarkers)

Reaching these patients requires getting their attention by talking to them using their words (not the clinical terminology often contained in product labelling).

Our plan

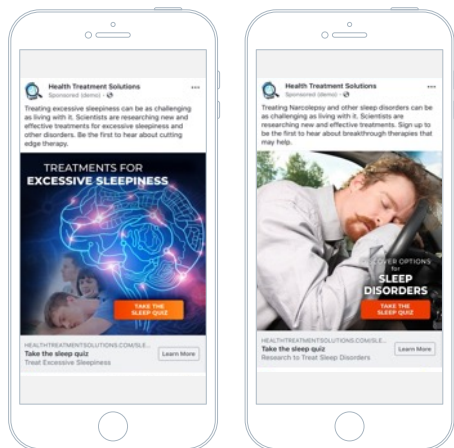
Serve targeted ads on social media to attract and identify prospective narcolepsy candidates using a 11-question screener based on inclusion/exclusion criteria of narcolepsy clinical trials.



Our process

Introduce a health care survey that would define diagnosis, current treatment program, frustration levels and willingness to try a new treatment.

We split-tested multiple creative concepts and while both tested well, the brain imagery slightly outperformed behavioral imagery.



Our projected patient acquisition ROI funnel

- \$600 spent on ads
- 93 total leads
- \$4.15 - \$6.45 CPL (Cost Per Lead)
- 5 confirmed narcolepsy diagnosis, so \$120 CPQL (Cost Per Qualified Lead)

Our Findings

In total, nearly 50% had a diagnosed sleep disorder, and 5 of 93 diagnosed as narcolepsy with cataplexy. About 75% are managing symptoms with naps and over 40% use medication of some kind. In all, less than 25% are satisfied with their current treatment plan.

Over 60% would like more information, and nearly 35% are interested in new medication. Most patients want to discuss new medication with their HCPs. In addition, about 20% favor peer-to-peer interactions, while 25% would like to speak with a nurse.

Implications for Action

This Pressure Test demonstrated our ability to successfully find narcoleptic and related sleep disorder patients. It uncovered patients' high willingness to act and underscored that education is very important.

Narcolepsy is slightly more common in men than women, yet some 85% of requests came from women. In future studies, we would increase our targeting of men and ask if the lead is completing the assessment for themselves or a loved one.

What are the parameters of a market Pressure Test?

How a Pressure Test works



Identify market opportunity



Launch survey & attract leads



Analyze results & share insights

Goals to Test

- Target Audience Response: Ad set, health risk assessment, form fill
- Target Audience Mindset: Willingness to engage and intent to fulfill
- Cost Per Responder (CPR) to complete process

Results to Learn

- Define the opportunity within a vertical
- De-risk the decision
- Friction points in Patient Activation pathway
- How to disrupt the marketplace
- How to attract, engage & educate the ideal patient prospect

Key Elements to Consider

- Target patient profile
- Strategic points to test and learn
- Inclusion / Exclusion Criteria (link to commercial product's PI or clinical protocol)
- Questions to uncover patient's intent or interest
- Branded or unbranded approach



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Patient Activation

83bar has developed a 4-part patient activation system integrated to:

- LOCATE prospective patients through risk assessment and health surveys;
- EDUCATE them to offer solutions and help them make informed decisions;
- NAVIGATE patients to action by appointment scheduling or service fulfillment; and through comprehensive follow-up; and
- ADVOCATE on behalf of improved treatment and health care.

Our expertise includes a wide range of medical categories:

- Aesthetics
- Cardiology
- Diabetes
- Endocrinology
- Gastroenterology
- IV therapy
- Men's health
- Molecular diagnostics
- Nutrition
- Oncology
- Ophthalmology
- Orthopedics
- Rare disease
- Surgery
- Urology / Urogynecology
- Women's health



**\$1 billion+ in
DTP acquisition**



**18% average
Facebook
conversion**



**900,000+ patient
prospects**



**>7:1 average
ROI for partner
companies**



**25+ partner
companies**