

INDUSTRY PERSPECTIVES

Expanding Awareness of Patient Support Programs

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Customers who purchase Phreesia's services should make their purchase decisions upon services, features and functions that are currently available.

Overview of our survey audience:



4,869

individuals participated
in the study*



69%

of participants
were on medications



69%

of participants
were under 65



65%

of participants
were female



35%

of participants
were male

**The margin of error for this study at the 95% confidence level is $\pm 1.4\%$.*

Phreesia conducted a survey among patients checking in for their doctors' visits on the Phreesia Platform from **February 17 to March 2, 2021**, to better understand their opinions of and experiences with patient support programs for medications.

THE PHARMA INDUSTRY HAS INVESTED HEAVILY IN SUPPORT PROGRAMS, AND PATIENTS CLEARLY WANT THEM



>\$5.7 BILLION

Pharma commitment to patient support in 2015¹

¹<https://patientsrisingnow.org/patient-assistance-programs-biggest-charity/>



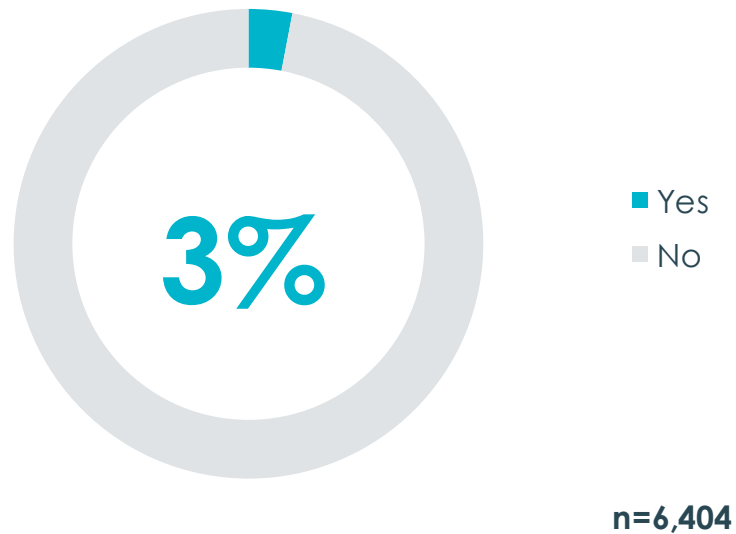
79%

of patients who value patient support programs mentioned specific programs they've found helpful

Among patients who will find Patient Support valuable n=563

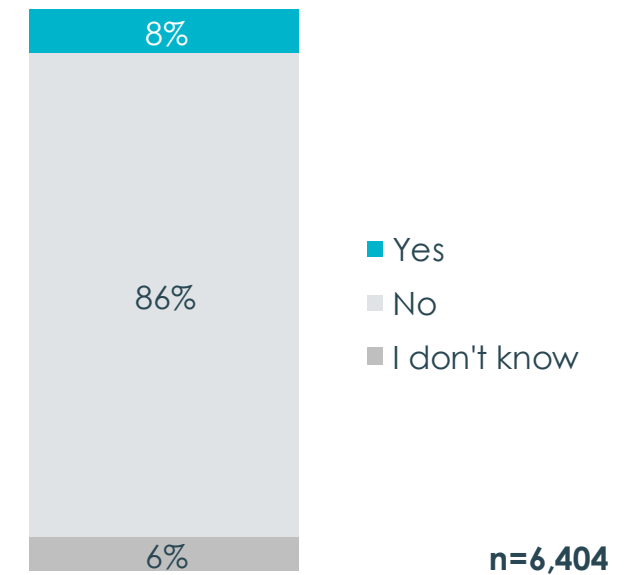
HOWEVER, A VAST MAJORITY OF PATIENTS HAVE NOT USED THE SUPPORT PROGRAMS

Are you currently using patient support programs?



Only **3%** of potentially eligible patients are currently using support programs

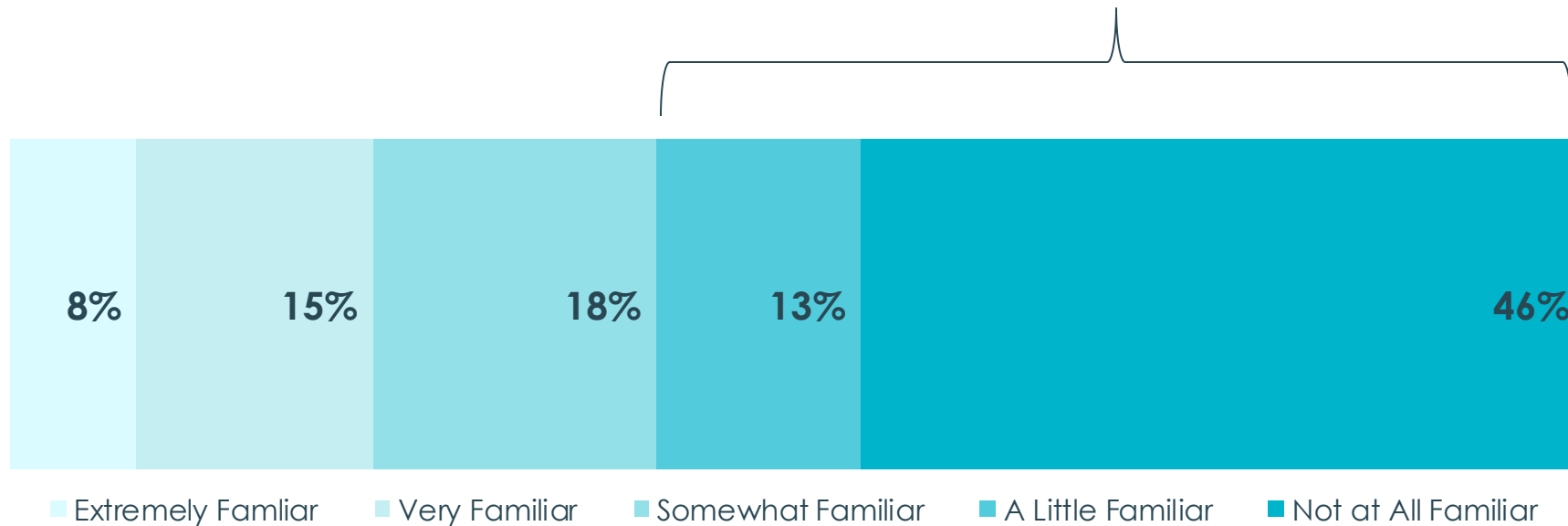
Have you ever used patient support programs for your medications?



Only **8%** of patients have ever used support programs

LACK OF FAMILIARITY WITH PATIENT SUPPORT PROGRAMS AND WHAT THEY OFFER MAY BE CONTRIBUTING TO LOW USAGE

Nearly **3 in 5 patients (59%)** have little to no knowledge of patient support programs

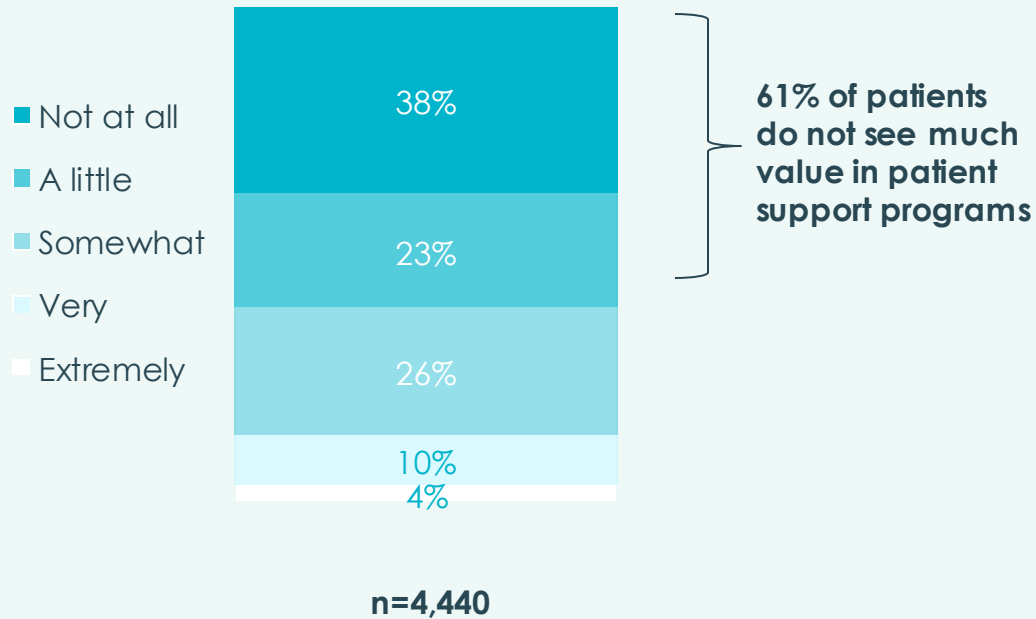


How familiar are you with patient support programs for your medication(s)? **n=6,349**

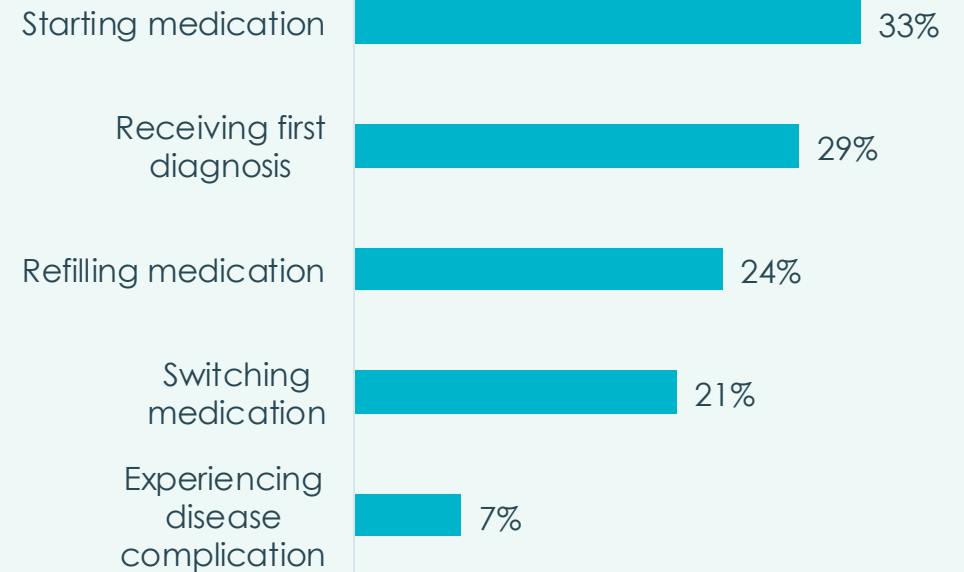
PATIENTS' USE OF PROGRAMS IS LIMITED TO SPECIFIC TIMES IN THEIR JOURNEYS AND SPECIFIC INTERVENTION TYPES

Patients do not currently realize the full value of patient support programs and are only using them at certain times, such as when they start a medication or are looking for medication information.

How helpful do you feel patient support programs would be for you?



When programs were used



Among patients who have ever used support programs
n=419

PATIENTS WANT MORE SUPPORT THAN THEY ARE CURRENTLY GETTING

Because of limited familiarity with, and exposure to, patient support programs, patients aren't using these resources past the initial diagnosis or medication start. But it's clear they want more.

Top programs used



46%

Medication Information



30%

Disease Education

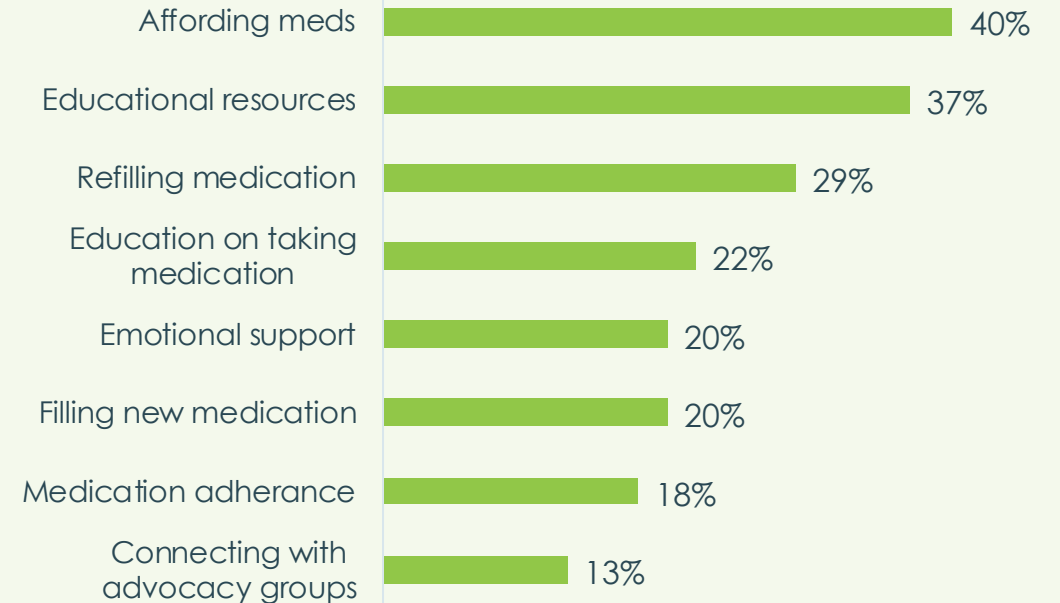


24%

Financial Support

n=467

What support programs patients want



n=563

THERE IS AN OPPORTUNITY TO EXPAND AND OPTIMIZE AWARENESS CHANNELS



HCPs will likely always be an essential source of information about patient support, but there is an opportunity to expand patient education through pharmacists or a variety of digital channels.

RECOMMENDATIONS TO MAXIMIZE PATIENT SUPPORT PROGRAM INVESTMENTS



Create marketing campaigns to increase awareness among qualified, targeted patients and educate them on the specific program offerings and benefits of joining



Build an integrated, omnichannel marketing plan centered on patient support programs that reaches target patients on online platforms they are already using



Ensure a seamless user experience so patients can quickly locate what they need when navigating information online



Partner with pharmacies to raise program awareness, including distributing brochures/materials or enlisting pharmacists to educate patients about these programs



Expand and promote the types of support that go beyond the initial education on the condition or medication and ensure patient support is ongoing throughout the patient journey

A life sciences client partnered with Phreesia to reach and educate qualified patients about its savings program

- ✓ Reached more than 11,000 qualified patients who were on client's portfolio of brands
- ✓ Educated patients about a savings offer
- ✓ Provided an easy way to sign up for the offer



9 in 10 qualified patients are **not currently using the brand's copay card**, but 53% say they are very likely to use if they have one. Low usage is further validated by the fact that nearly **2 in 3 patients found the information during the campaign new**



KEY RESULTS

 **53%**

of patients said they were very likely to use the copay card, demonstrating that patients were motivated to act based on content they saw on the Phreesia platform

HOW PHREESIA CAN DRIVE PATIENT SUPPORT EFFORTS

Phreesia's digital engagement solutions drive awareness in clinically relevant audiences, providing personalized content at the point of care through **every step of the journey**



- ✓ Phreesia's PatientConnect offers direct, one-to-one engagements before, during, and after in-office and telehealth appointment check-ins that cut through the noise and address patients' specific needs and priorities
- ✓ Access to relevant patient data offers the highest level of campaign personalization for segmentation strategies
- ✓ Patient-level approach to measurement and campaign validation

HOW PHRESIA UNCOVERS PATIENT SUPPORT PERCEPTIONS & DRIVERS

Phreesia PatientInsights offers a platform to tap into the voices of millions of real patients for fast, actionable market research



- ✓ Deliver custom, logic-driven surveys to highly targeted patients at the point of care
- ✓ Understand changing patient attitudes and understand the behaviors that impact your brand
- ✓ Uncover unmet needs, motivations, concerns and questions that will drive patients to take action

Get in touch to start engaging more patients
in your support programs.



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MEMBER | POINT OF CARE COMMUNICATION COUNCIL