

# GoodRx

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## Pharma Manufacturer Solutions

August 12, 2021



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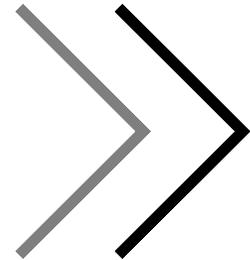
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# Pharma Manufacturer Solutions is GoodRx's fastest growing offering with the most attractive economics

**~20M**  
High intent  
Monthly Visitors<sup>1</sup>

**20%**  
of GoodRx searches  
are for Brand Drugs<sup>2</sup>

**10x+**  
More traffic than pharma  
manufacturer's own  
drug sites<sup>3</sup>



**~3X**  
YTD YoY Revenue  
Growth<sup>4</sup>

**Attractive  
Economics**  
Capitalizing on existing  
traffic

**150%+**  
Net Revenue Retention<sup>5</sup>

**19**  
Of Top 20 Pharma  
Manufacturers Work with  
Us<sup>2</sup>

**100+**  
Pharma Brands We  
Work With<sup>2</sup>

**85%**  
of Revenue Substantially  
Flat Fee Based Model<sup>6</sup>

1. As of Q1'21.  
2. Based on internal data as of YTD Q2 2021.  
3. Based on internal analysis comparing the top 100 brand drug volume to GoodRx drug pages compared to the volume on the manufacturer's own savings portion of their drug sites. Figure reflects avg of all ratios.  
4. Reflects YTD revenue growth H1 2021 over H1 2020.  
5. YTD 2Q21 Net Revenue Retention compares total revenue generated from all clients in the YTD period ending 6/30/20 to total revenue generated from the same clients in the YTD period ending 6/30/21 (i.e., excludes new client relationships beyond 6/30/2020).  
6. Based on internal data. Reflected revenue that is not variable/volume based.

# Our deep provider and consumer relationships position us uniquely with pharma manufacturers



## GoodRx for Providers

400K+ HCPs and HCP offices distribute GoodRx Materials<sup>1</sup>

88% awareness with HCPs & ~80% recommended GoodRx<sup>2</sup>

17% of platform visitors are HCPs<sup>3</sup>

2M+ prescribers have a patient who used GoodRx<sup>1</sup>

HCP NPS of 86<sup>4</sup>

# GoodRx

## GoodRx for Consumers



Access to medication improved according to 93% of HCPs<sup>5</sup>

Patient adherence improved according to 87% of HCPs<sup>5</sup>

GoodRx beats insurance 50%+ of the time by an avg of 50%+<sup>6</sup>

GoodRx users have saved over \$30B to date<sup>7</sup>

Consumer NPS of 90<sup>4</sup>

**“GoodRx is giving patients access to medicines that they wouldn't otherwise be able to afford.”**

— Dr. Joe Flores, California

1. Based on internal data.  
2. Based on an internal survey run in July 2020.  
3. Based on an internal survey run in February 2020.  
4. Net Promoter Score. Consumer NPS based on survey ran in July 2021. Provider promoter score based on a survey ran in February 2020.  
5. Based on an internal survey run in July 2021.  
6. Based on a GoodRx study, *The GoodRx Effect* Comparing the discounted GoodRx price to the cash/Usual & Customary price charged by pharmacies. In 2020, over 55% of prescriptions filled using GoodRx (including our Gold and Kroger membership savings programs) were cheaper than the average commercial insurance copays for the 100 most purchased medications, based on industry data. When GoodRx users paid less than average commercial insurance copays, they saved on average 52% off average commercial insurance copays in 2020.  
7. Comparing the discounted GoodRx price to the cash/Usual & Customary price charged by pharmacies.

# The specific issues surrounding branded medications create challenges for pharma manufacturers, patients and HCPs

**\$30B**

Medical marketing and advertising spend by pharma manufacturers<sup>1</sup>

**69%**

Of patients have made personal sacrifices to afford medications<sup>2</sup>

**70%**

Of HCPs say high cost is the number one reason patients don't pick up prescriptions<sup>3</sup>

## Pharma Manufacturers

- Looking to increase utilization of robust patient support and affordability solutions
- Pharma rep interactions down 70% in 2020<sup>4</sup>
- IDFA and a cookieless world may limit the ability to digitally engage the right audience

## Patients

- Branded medication costs have increased 78% since 2014<sup>5</sup>
- Patient awareness and utilization of existing manufacturer support programs is very low<sup>6</sup>
- 30% of prescriptions in the US are left unfilled at the pharmacy and the main reason is cost<sup>7</sup>

## HCPs

- 77% of patients think it is very important to discuss affordability options with their doctor<sup>8</sup>
- HCPs spend an average of 14.6 hours per week on administrative tasks for therapy access<sup>9</sup>
- 87% of HCPs do not want in person pharmaceutical sales rep visits<sup>10</sup>

1. Medical Marketing in the United States (<https://jamanetwork.com/journals/jama/fullarticle/2720029>)

2. CoverMyMeds Patient and Provider Surveys, 2020 (<https://www.prnswire.com/news-releases/new-data-reveals-nearly-70-of-patients-make-personal-or-financial-sacrifices-to-afford-medications-301081467.htm>)

3. [https://www.optimizeRx.com/hubfs/OptimizeMDs/OptimizeMD\\_Survey\\_010821\\_by\\_OptimizeRx\\_and\\_THINK\\_Health.pdf](https://www.optimizeRx.com/hubfs/OptimizeMDs/OptimizeMD_Survey_010821_by_OptimizeRx_and_THINK_Health.pdf)

4. <https://www.mckinsey.com/industries/pharmaceuticals-and-medical-products/our-insights/ready-for-launch-reshaping-pharmas-strategy-in-the-next-normal>

5. GoodRx List Price index ([https://www.datawrapper.de/\\_/NeZU/](https://www.datawrapper.de/_/NeZU/))

6. <https://www.fiercepharma.com/marketing/pharmas-return-5-billion-spent-yearly-patient-support-programs-only-3-use-survey>; CoverMyMeds Patient Survey, 2020 (<https://insights.covermymeds.com/patient-experience/affordability/finding-prescription-affordability-options-amid-a-flood-of-cards>)

7. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6045499/>

8. Based on 2016 medical marketing and advertising spend published in Journal of the American Medical Association in 2019

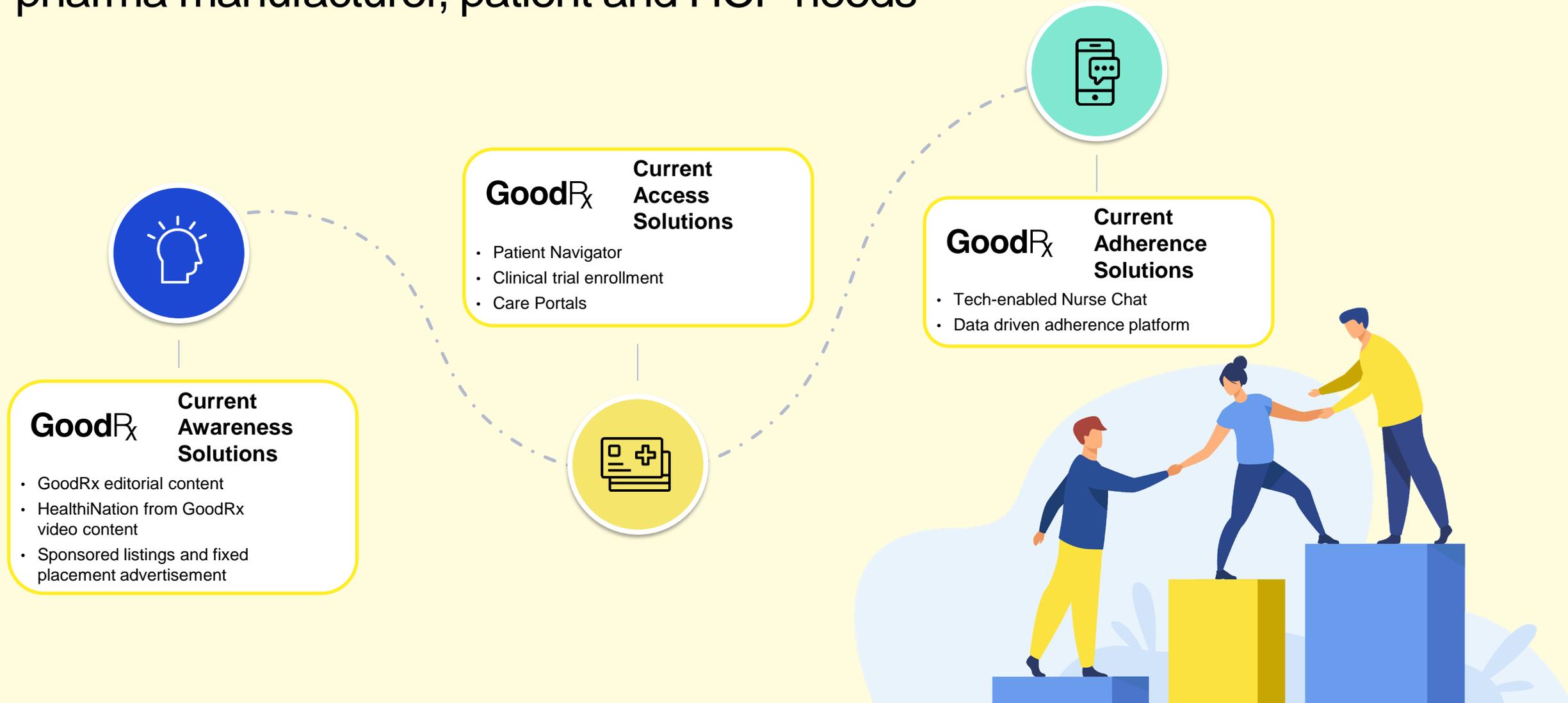
9. <https://www.ama-assn.org/practice-management/sustainability/prior-authorization-major-practice-burden-how-do-you-compare>

10. <https://newsroom.accenture.com/news/pharma-companies-have-improved-how-they-engage-with-healthcare-providers-during-covid-19-finds-new-research-from-accenture.htm>

# Pharmaceutical manufacturers invest in Awareness, Access and Adherence strategies along the patient journey



# GoodRx has Awareness, Access and Adherence solutions to meet pharma manufacturer, patient and HCP needs



# Improving Awareness, Access and Adherence drives better outcomes for all stakeholders

	Manufacturer Benefit	Consumer Benefit	HCP Benefit
Awareness Solutions	Ability to promote innovative and life saving products and services	Ability to easily find HCP reviewed authoritative educational resources for their medications and conditions	Ability to easily find and recommend educational resources to patients
Access Solutions	Ability to enable incremental consumers to start on therapy	Ability to easily find savings and support resources to start on therapy	Ability to easily find and recommend savings and support resources to patients
Adherence Solutions	Ability to increase adherence, delivering increased LTV for patients on therapy	Provides consumers a highly trusted and confidential liaison to help them through their patient journey	Creates confidence patients will stay on therapy and offloads work

## Value propositions



Pharma Manufacturers **convert high LTV** patients at a **better ROI** than alternative solutions



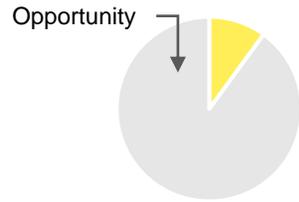
Consumers receive **savings and support** they need to start and stay on therapy



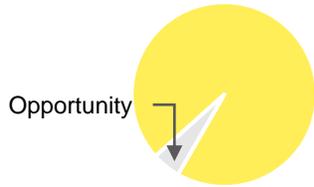
HCPs **drive better patient outcomes and patient satisfaction** while **saving administrative time**

# We are at the early stages of penetrating the pharma manufacturer opportunity

**Current relationships<sup>1</sup> with pharma manufacturers**

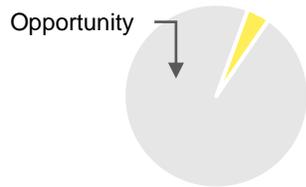


**10% of 550**  
U.S. manufacturers



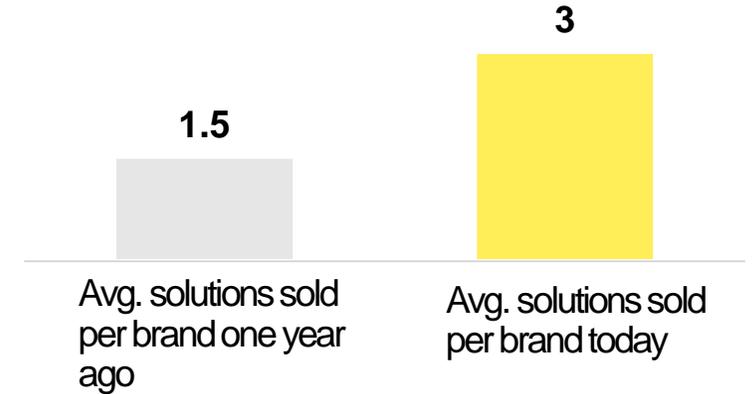
**95% of Top 20**  
U.S. manufacturers

**Significant brand expansion runway**

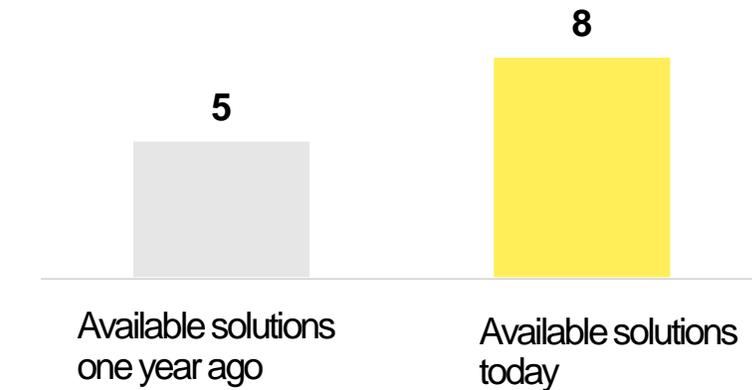


**Only 4% of ~1,000**  
brands of top 20 manufacturers

**Successfully upselling**



**Innovating our solution set**



1. Working with GoodRx for at least one brand.

# Conclusion



**Fastest growing offering with the most attractive economics**



**Innovative solutions that address HCPs, patients, and pharma manufacturer challenges**



**Shifts to digital marketing and solutions by pharma manufacturers create attractive macro tailwinds**



**Current relationships with pharma manufacturers are sticky and expanding**



**Attractive growth opportunity across the pharma manufacturer universe**

# GoodRx

