Comparative Effectiveness Research and the Environment for Health Care Decision Making

A 2012 Survey of Health Care Stakeholders
Background and Purpose

• Recent emphasis on research that can assist in making healthcare decisions
• NPC conducted a baseline survey (2010-2011) on a series of issues that describe elements of the changing decision-making environment
• In 2011-2012, re-surveyed stakeholders to assess changes in perceptions
Methods

- Six groups were targeted for inclusion in the survey:
  - researchers/thought leaders;
  - government;
  - insurers and health plans;
  - employers;
  - business coalitions/HR specialists; and
  - associations/trade groups
Methods

• All groups—except for researchers/thought leaders—were organizational stakeholders

• Web survey links were sent by email, if available, and paper surveys were sent by FedEx

• Follow-up phone calls and multiple mailings encouraged stakeholders to complete the survey
Of the 370 individuals and organizations invited, 117 completed the survey from 10/20/2011 through 2/6/2012.
CER Continues to Be Important

2011: Very Important 71%, Somewhat Important 20%, Slightly Important 8%, Not at all Important 0%

2012: Very Important 64%, Somewhat Important 31%, Slightly Important 4%, Not at all Important 0%
Slight Increase in Familiarity with Mission and Role of PCORI

2011 2012

Very Familiar
35% 41%

Somewhat Familiar
35% 37%

Slightly Familiar
16% 9%

Not at all Familiar
14% 13%
Groups Believed to Play a Significant Role in CER in the Next Five Years

Establishing Research Standards

<table>
<thead>
<tr>
<th>Group</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>AHRQ</td>
<td>78%</td>
<td>83%</td>
</tr>
<tr>
<td>NIH</td>
<td>64%</td>
<td>60%</td>
</tr>
<tr>
<td>FDA</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>PCORI</td>
<td>50%</td>
<td>72%</td>
</tr>
<tr>
<td>Academia</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Private Health Plans</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Pharm-Medical Products</td>
<td>13%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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Groups Believed to Play a Significant Role in CER in the Next Five Years

Establishing Research Priorities

AHRQ | NIH | FDA | PCORI | Academia | Private Health Plans | Pharma-Medical Products Industry

<table>
<thead>
<tr>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>74%</td>
<td>77%</td>
</tr>
<tr>
<td>69%</td>
<td>71%</td>
</tr>
<tr>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>63%</td>
<td>67%</td>
</tr>
<tr>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>31%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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NPC
Groups Believed to Play a Significant Role in CER in the Next Five Years

Funding and Monitoring Research

- AHRQ: 74% (2011) 74% (2012)
- NIH: 81% (2011) 85% (2012)
- FDA: 24% (2011) 21% (2012)
- PCORI: 60% (2011)
- Academia: 8% (2011) 15% (2012)
- Private Health Plans: 28% (2011) 31% (2012)
- Pharmaceutical Products Industry: 68% (2011) 66% (2012)
Groups Believed to Play a Significant Role in CER in the Next Five Years

Conducting Research

<table>
<thead>
<tr>
<th>Group</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>AHRQ</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>NIH</td>
<td>59%</td>
<td>50%</td>
</tr>
<tr>
<td>FDA</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>PCORI</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Academia</td>
<td>85%</td>
<td>88%</td>
</tr>
<tr>
<td>Private Health Plans</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>Pharm-Medical Products Industry</td>
<td>62%</td>
<td>70%</td>
</tr>
</tbody>
</table>
Growing Potential for CER Impact on Health Care Decision Making

- **Past Year**: 1% Substantial Improvement, 10% Moderate Improvement, 5% Slight Improvement, 49% No Effect, 34% Negative Impact
- **Next Year**: 1% Substantial Improvement, 24% Moderate Improvement, 6% Slight Improvement, 57% No Effect, 12% Negative Impact
- **Next 3 Years**: 1% Substantial Improvement, 22% Moderate Improvement, 1% Slight Improvement, 54% No Effect, 23% Negative Impact
- **Next 5 Years**: 9% Substantial Improvement, 38% Moderate Improvement, 53% Slight Improvement, 0% No Effect, 0% Negative Impact

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Issue 1: Research Methods

Availability of New Research Methods

- **2 Years Ago**:
  - Extremely Limited: 35%
  - Readily Available: 2%

- **1 Year Ago**:
  - Extremely Limited: 21%
  - Readily Available: 9%

- **Today**:
  - Extremely Limited: 16%
  - Readily Available: 14%

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Issue 2: Research Standards

Availability of Agreed-Upon Research Standards

- 38% No Standards
- 7% Widely Agreed-Upon Standards (2 Years Ago)
- 20% No Standards
- 10% Widely Agreed-Upon Standards (1 Year Ago)
- 26% No Standards
- 14% Widely Agreed-Upon Standards (Today)
Issue 3: Research Priorities

Research Priorities Adequately Address Treatment Choices Faced by Patients and Providers

- 37% do not address
- 27% adequately address

Comparison:
- 2 Years Ago: 6%
- 1 Year Ago: 11%
- Today: 12%
Issue 4: Interpretation of Evidence

Use of Objective and Transparent Processes for Interpreting Evidence

- Not At All Transparent & Objective
- Fully Transparent & Objective

<table>
<thead>
<tr>
<th>Time</th>
<th>Not Transparent</th>
<th>Transparent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Years Ago</td>
<td>39%</td>
<td>5%</td>
</tr>
<tr>
<td>1 Year Ago</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>Today</td>
<td>25%</td>
<td>19%</td>
</tr>
</tbody>
</table>
Issue 5: Predicting the Diffusion of Treatments

Predictability of Adoption and Diffusion of Medical Treatments/Technologies

- Not At All Predictable
- Highly Predictable

- 35% Not At All Predictable 2% Highly Predictable at 2 Years Ago
- 18% Not At All Predictable 4% Highly Predictable at 1 Year Ago
- 22% Not At All Predictable 8% Highly Predictable Today
Issue 6: Exchange of Medical Evidence

Exchange of Medical Evidence Across Payers, Providers, Industries, and Agencies

- Varying Standards and Limitations
- Consistent and Transparent

<table>
<thead>
<tr>
<th>Period</th>
<th>Varying Standards and Limitations</th>
<th>Consistent and Transparent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Years Ago</td>
<td>47%</td>
<td>4%</td>
</tr>
<tr>
<td>1 Year Ago</td>
<td>32%</td>
<td>4%</td>
</tr>
<tr>
<td>Today</td>
<td>36%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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Issue 7: Focus of Treatment Assessments

Consideration of Quality, Outcomes, and Value in Treatment Assessments

- **Consider Only Clinical Effectiveness**
  - 40% 2 Years Ago
  - 26% 1 Year Ago
  - 39% Today

- **Broad Focus**
  - 3% 2 Years Ago
  - 6% 1 Year Ago
  - 11% Today

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Issue 8: Purchasing Decisions

Health Care Services Purchasing Decisions

- Individual View of Services
- Integrated View of Services

- 62% 2% 2%
- 46% 2%
- 45% 6%

2 Years Ago | 1 Year Ago | Today
Issue 9: Outcomes-Based Contracting

Extent of Outcomes-Based Contracting

- Little to None
- Widespread

2 Years Ago: 71%
1 Year Ago: 51%
Today: 58%
Conclusions

• There is a growing recognition of PCORI and its role in CER
• Stakeholders are more pragmatic about how CER will be used and who will be funding it
• There is optimism about availability of research methods, standards, transparency and objectivity in interpreting CER
• There are lower expectations about consistent and transparent methods for exchanging information, and that broader measures of value are not considered