The State of CER and the Environment for Decision Making

April 2011
Increasing emphasis on evidence and new requirements for CER are likely to mean significant changes for healthcare decision making.

NPC identified a series of factors or issues that describe the changing decision-making environment.

Conducted a survey of stakeholders to assess the current environment and to serve as a baseline for progress.
Methods

- Six groups were targeted for inclusion in the survey: researchers/thought leaders; government; insurers and health plans; employers; HR specialists; and trade groups
- Researchers/thought leaders were selected for individual expertise; other respondents identified by affiliation with key stakeholder organizations
- 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 376 individuals and organizations invited, 111 completed the survey from November 8, 2010 through March 3, 2011.

<table>
<thead>
<tr>
<th>Group</th>
<th>Respondents</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>Percentage</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>11</td>
<td>9.9</td>
<td></td>
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<tr>
<td>Researchers/thought leaders</td>
<td>32</td>
<td>28.8</td>
<td></td>
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<tr>
<td>Insurers and health plans</td>
<td>21</td>
<td>18.9</td>
<td></td>
</tr>
<tr>
<td>Employers</td>
<td>5</td>
<td>4.5</td>
<td></td>
</tr>
<tr>
<td>HR specialists</td>
<td>32</td>
<td>28.8</td>
<td></td>
</tr>
<tr>
<td>Trade groups</td>
<td>10</td>
<td>9.0</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>111</td>
<td>100</td>
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Respondent Knowledge of CER

• Only those respondents indicating at least some familiarity with CER were asked to complete the survey
• About 55 percent of survey respondents were “very familiar” with comparative effectiveness research (CER)
• CER is “very important” to slightly less than three-quarters of respondents or their organizations
• About one-third were “very familiar” with the Patient-Centered Outcomes Research Institute (PCORI)
Establishing Research Standards

- AHRQ: 78%
- NIH: 64%
- FDA: 39%
- PCORI: 50%
- Academia: 46%
- Private Health Plans: 12%
- Pharm-Medical Products Industry: 13%
Groups Believed to Play a Significant Role in CER in the Next Five Years

Establishing Research Priorities

- AHRQ: 74%
- NIH: 69%
- FDA: 26%
- PCORI: 63%
- Academia: 27%
- Private Health Plans: 30%
- Pharmaceutical Products Industry: 31%
Groups Believed to Play a Significant Role in CER in the Next Five Years

Funding and Monitoring Research

- AHRQ: 74%
- NIH: 81%
- FDA: 24%
- PCORI: 44%
- Academia: 8%
- Private Health Plans: 28%
- Pharmaceutical and Medical Products Industry: 68%
Groups Believed to Play a Significant Role in CER in the Next Five Years

Conducting Research

- AHRQ: 43%
- NIH: 59%
- FDA: 16%
- PCORI: 25%
- Academia: 85%
- Private Health Plans: 29%
- Pharmacuetical Industry: 62%
68% of respondents believed it would take less than 3 years to establish research standards for CER studies.

85% felt that CER led to little or no improvement for health care decision-making in the past year; 11% thought it led to moderate improvements.

30% believed that CER would lead to moderate improvements in health care decision-making in the next year.
Issue 1: Research Methods

Availability of New Research Methods

- Extremely Limited
- Readily Available

12 Months Ago:
- Extremely Limited: 35%
- Readily Available: 2%

Today:
- Extremely Limited: 21%
- Readily Available: 9%
Issue 2: Research Standards

Availability of Agreed-Upon Research Standards

- No Standards: 38%
- Widely Agreed-Upon Standards: 7%

12 Months Ago

- No Standards: 20%
- Widely Agreed-Upon Standards: 10%

Today
Issue 3: Research Priorities

Research Priorities Adequately Address Treatment Choices Faced by Patients and Providers

- Do Not Address
- Adequately Address

12 Months Ago:
- 37% Do Not Address
- 6% Adequately Address

Today:
- 19% Do Not Address
- 11% Adequately Address
Issue 4: Interpretation of Evidence

Use of Objective and Transparent Processes for Interpreting Evidence

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

12 Months Ago:
- 39% Not At All Transparent & Objective
- 5% Fully Transparent & Objective

Today:
- 24% Not At All Transparent & Objective
- 8% Fully Transparent & Objective
Issue 5: Predicting the Diffusion of Treatments

Predictability of Adoption and Diffusion of Medical Treatments/Technologies

- Not At All Predictable
- Highly Predictable

12 Months Ago:
- 35% Not At All Predictable
- 2% Highly Predictable

Today:
- 18% Not At All Predictable
- 4% Highly Predictable
Issue 6: Exchange of Medical Evidence

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

- Varying Standards and Limitations: 47%
- Consistent and Transparent: 32%

12 Months Ago: 4%
Today: 4%
Issue 7: Focus of Treatment Assessments

Consideration of Quality, Outcomes, and Value in Treatment Assessments

- Consider Only Clinical Effectiveness
- Broad Focus

<table>
<thead>
<tr>
<th></th>
<th>12 Months Ago</th>
<th>Today</th>
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<tbody>
<tr>
<td>Consider Only</td>
<td>40%</td>
<td>26%</td>
</tr>
<tr>
<td>Broad Focus</td>
<td>3%</td>
<td>6%</td>
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Health Care Services Purchasing Decisions

- Individual View of Services
- Integrated View of Services

62% 12 Months Ago
46% Today

2%
Issue 9: Outcomes-Based Contracting

Extent of Outcomes-Based Contracting

- Little to None
- Widespread

12 Months Ago:
- 0%

Today:
- 1%
- 51%
Differences by Stakeholder Group

- Subgroup analysis limited by sample size but some patterns observed in 3 largest groups: insurers, researchers/thought leaders; and HR specialists.
- Researchers/thought leaders saw a majority of issues as somewhat farther along the expected path of change.
  - Particularly for issues related to research.
- Although less positive overall, HR specialists and insurers, generally perceived more progress in last year.
Conclusions

- Stakeholders are aware of the changing environment and the importance of CER
- But little impact of CER on decision making thus far
- Optimistic that CER will provide some improvement in the coming year
- Environment for decision making in the “right” or expected direction