



NEHI

Innovation Barometer

2012 Benchmark Survey

Introduction

Encouraging widespread dialogue about health care innovation is a core value of NEHI and its diverse member organizations. In partnership with Ernest & Young, NEHI engaged APCO Insight, the opinion research arm of APCO Worldwide, to survey 500 “opinion leaders” from randomly selected households across the US. The goal of the survey was three fold: to gauge public attitudes on various issues related to health care innovation; to establish a benchmark for measuring shifts in attitudes in future surveys; and to stimulate dialogue about a range of health care innovation topics among the public, policymakers and health care leaders.

About NEHI

NEHI is a national health policy institute focused on enabling innovation to improve health care quality and lower health care costs. In partnership with members from across the health care system, NEHI conducts evidence-based research and stimulates policy change to improve the quality and the value of health care. Together with this unparalleled network of committed health care leaders, NEHI brings an objective, collaborative and fresh voice to health policy. For more information, visit www.nehi.net.



KEY FINDINGS

BACKGROUND & OBJECTIVES

DETAILED FINDINGS

INNOVATION BAROMETER

2012 FOCUS: COST CONTAINMENT

METHODOLOGY



Key Findings

INNOVATION BAROMETER:

- The U.S. is recognized as the most innovative country when it comes to health care, though most do not consider health care to be a particularly innovative sector.
- Opinion leaders have mixed evaluations for the current U.S. health care system, but they overwhelmingly agree that soaring costs are putting America's health care at risk and that controlling these costs is an important goal for balancing the federal budget and improving the U.S. economy.
- Opinion leaders agree that innovation in health care is important and most see it playing a significant role in the improvement of overall health and quality of care, discovery of new treatments, and increased health care access for all Americans.

2012 FOCUS: COST CONTAINMENT:

- Innovation is the preferred approach to control health care spending, not cuts and strict budgets. Nonetheless, most opinion leaders believe innovation comes at a price – but they support near-term investment (even if it increases federal deficits) with the hope innovation will improve efficiency.
- Opinion leaders do not favor government regulation as an approach to controlling health care costs, preferring an involved, yet indirect approach. Still, the majority supports government proposals related to health IT, biomedical research, and upgrading the FDA (the critical role for which is to disclose risks when it comes to drug approvals).

KEY DEMOGRAPHIC DISTINCTION:

- Partisan identification is the key differentiator in opinion leaders' positions. Significantly more Democrats have a pessimistic view of the current U.S. health care system, driving increased concerns around cost and efficiency. Furthermore, inherent ideological views emerge with Democrats strongly supporting the federal government's role in improving the system while Republicans prefer a hands off, market-driven approach.



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Background & Objectives

- NEHI, with the support of Ernst & Young, engaged APCO Insight, the opinion research consultancy of APCO Worldwide, to design and conduct *The NEHI Innovation Barometer*.
- The survey was publically released at NEHI's April 2012 conference entitled "Bridging the Innovation Gap."
- Encouraging widespread dialogue about health care innovation is a core value of NEHI and the NEHI Innovation Barometer is meant to support those initiatives in a manner that can bring together diverse audiences.
- The NEHI Innovation Barometer is intended to stimulate conversation about diverse health care innovation topics among the public, policy makers, and other health care decision-makers.
- This public opinion survey establishes a baseline on the understanding of and receptivity toward various issues related to health care innovation.
- The 2012 Innovation Barometer will serve as a benchmark against which shifts and trends in public opinion in future surveys can be measured.



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Controlling health care costs is an important goal for a balanced budget

Importance to balancing the federal budget & improving US economy

(Average rank from 1 to 4)

Reducing waste and
inefficiency in the federal 2.0

Controlling health care costs 2.2

Ensuring for adequate defense
to protect the country 2.7

Providing for reasonable tax cuts 3.2

- “Controlling health care costs” is ranked as the 2nd most important goal for balancing the federal budget and improving the U.S. economy, behind “reducing waste and inefficiency in the federal government.”

Q1. For the following list of items, please rank order each to tell me which is most important when it comes to the goals of balancing the federal budget and improving the US economy. And, which is next most important? Lastly, which is least important?



Important Goals for Balancing the Federal Budget

Demographic Detail

- Most demographic subgroups agree that reducing waste and inefficiency is the #1 priority.
- Central region places the strongest emphasis on reducing waste and inefficiency.
- Importance of controlling health care costs varies by political party affiliation. Democrats say it is most important (1.7), while Independents rank it significantly lower (2.2), and Republicans even lower (2.8).

Importance to balancing the federal budget & improving US economy (rank)

Shading = highest rank

	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
	n=500	237	263	8*	73	172	233	107	134	179	136	↓ 115	145	102	147	157	180	242	246	296	108	45*
Reducing waste and inefficiency in the federal	2.0	2.0	1.9	2.3	1.7	2.1	1.9	2.1	1.9	1.9	2.0	1.7	2.1	2.0	1.9	2.1	1.9	1.9	2.0	1.9	2.0	2.3
Controlling health care costs	2.2	2.2	2.2	1.8	2.3	2.1	2.3	2.0	2.1	2.3	2.1	2.3	2.2	2.2	2.8	1.7	2.2	2.3	2.1	2.2	2.3	2.0
Ensuring for adequate defense to protect the country	2.7	2.6	2.8	2.9	2.8	2.7	2.5	2.6	2.8	2.7	2.7	2.8	2.5	2.9	2.3	2.9	2.7	2.6	2.8	2.7	2.5	2.4
Providing for reasonable tax cuts	3.2	3.2	3.2	3.1	3.2	3.2	3.3	3.3	3.2	3.2	3.3	3.2	3.2	2.9	2.9	3.3	3.3	3.3	3.1	3.2	3.3	3.3

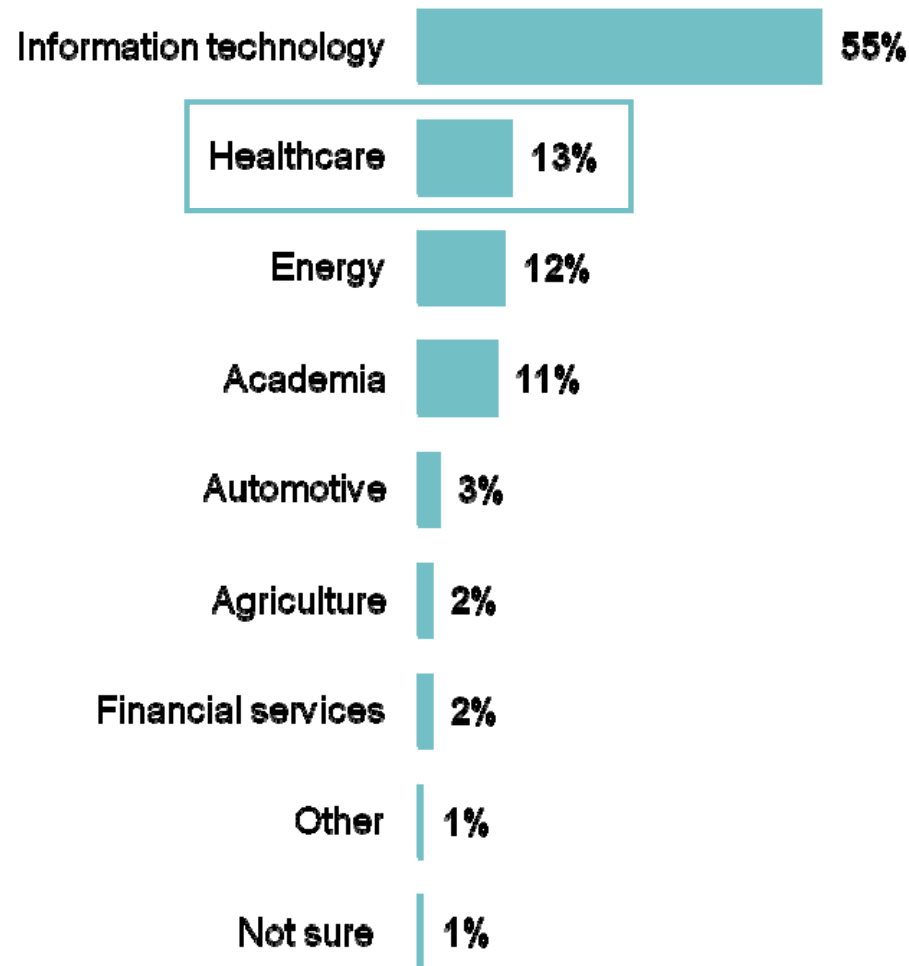
*Due to small base sample sizes, not included in significance testing.

Q1. For the following list of items, please rank order each to tell me which is most important when it comes to the goals of balancing the federal budget and improving the US economy. And, which is next most important? Lastly, which is least important?



Information technology is leading innovation, not health care

Particularly innovative industries & sectors



- Across a range of industries, 13% consider “health care” to be particularly innovative – a similar rate as “energy” and “academia.”
- Exceeding health care by a 4:1 margin, “information technology” is ranked as the most innovative industry.

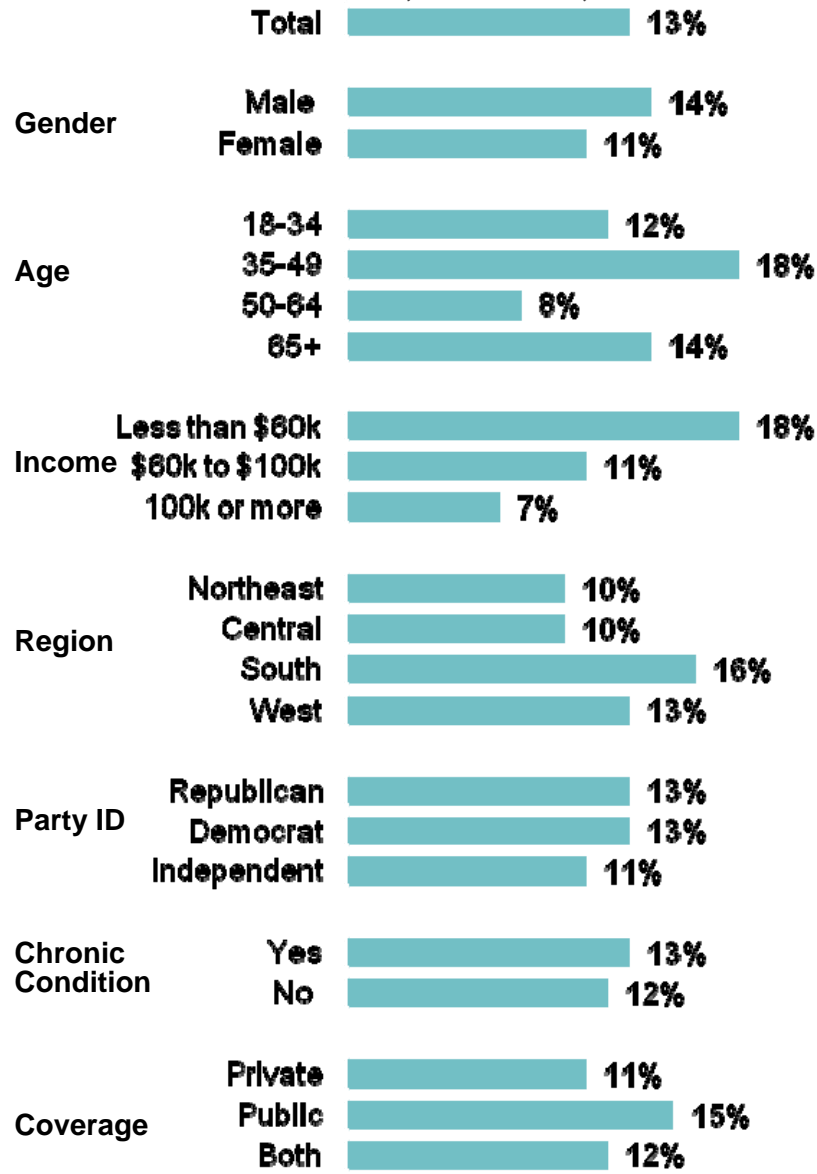
Q2. Which one of the following industries and sectors do you consider to be particularly innovative?



Sectors for Innovation

Demographic Detail

Particularly innovative industries & sectors
(% health care)



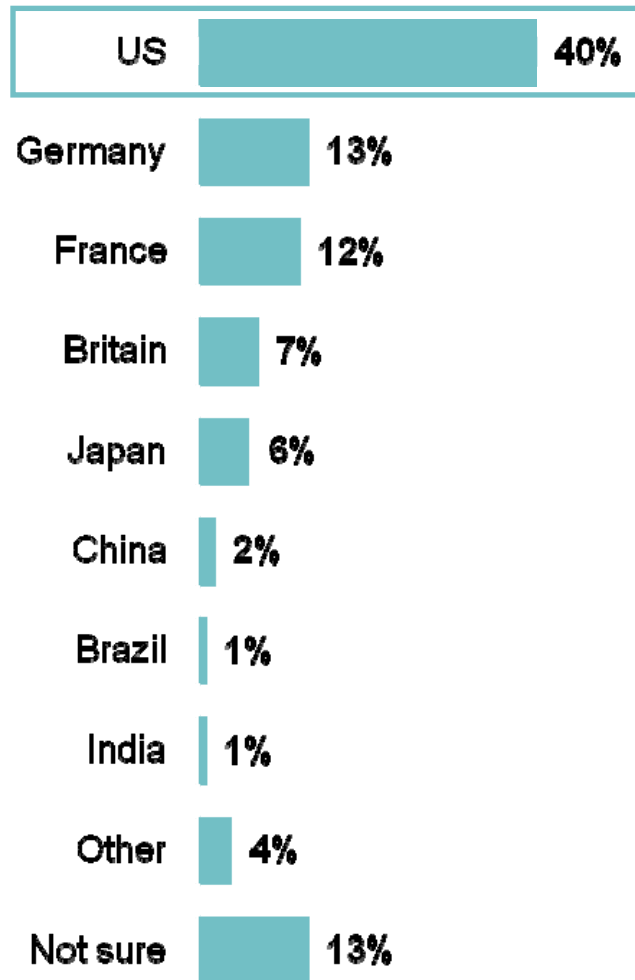
- Health care is considered an innovative sector at a similar rate across demographic subgroups. There are no significant differences.

Q2. Which one of the following industries and sectors do you consider to be particularly innovative?



The U.S. is recognized as having the most innovative health care industry in the world

Most innovative country



- Four in ten consider the U.S. to be the most innovative country when it comes to health care.
- U.S. leads the second ranked country (Germany) by a 3:1 margin.

Q3. When it comes to health care, which do you currently consider to be the most innovative country in the world?



Most Innovative Country

Demographic Detail

- Republicans especially see the U.S. as a leader, choosing it more than twice as often as Democrats.
- France is seen as most innovative among Democrats and 18-34 year olds, though the latter has such a small base size that it may be anomaly.

Most innovative country (% each) <small>Shading = highest rank</small>	Total n=	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
US	500	237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
Germany	13	14	13	-	15	19	9	14	19	11	7	17	12	21	5	17	16	10	16	14	7	14
France	12	8	15	50	5	4	9	4	10	15	9	9	19	9	2	27	5	13	12	11	10	6
Britain	7	6	7	12	3	9	5	13	9	3	9	7	5	6	3	12	5	6	7	8	3	6
Japan	6	6	6	12	8	6	2	4	6	8	9	4	4	6	10	5	5	2	9	7	2	-
China	2	2	1	-	4	1	1	1	4	1	3	2	2	-	3	1	1	1	2	2	1	-
Brazil	1	-	2	-	1	1	1	-	1	1	1	-	2	1	-	1	1	1	1	1	1	-
India	1	1	1	-	3	1	1	3	1	1	1	-	2	3	2	1	2	3	1	2	2	-

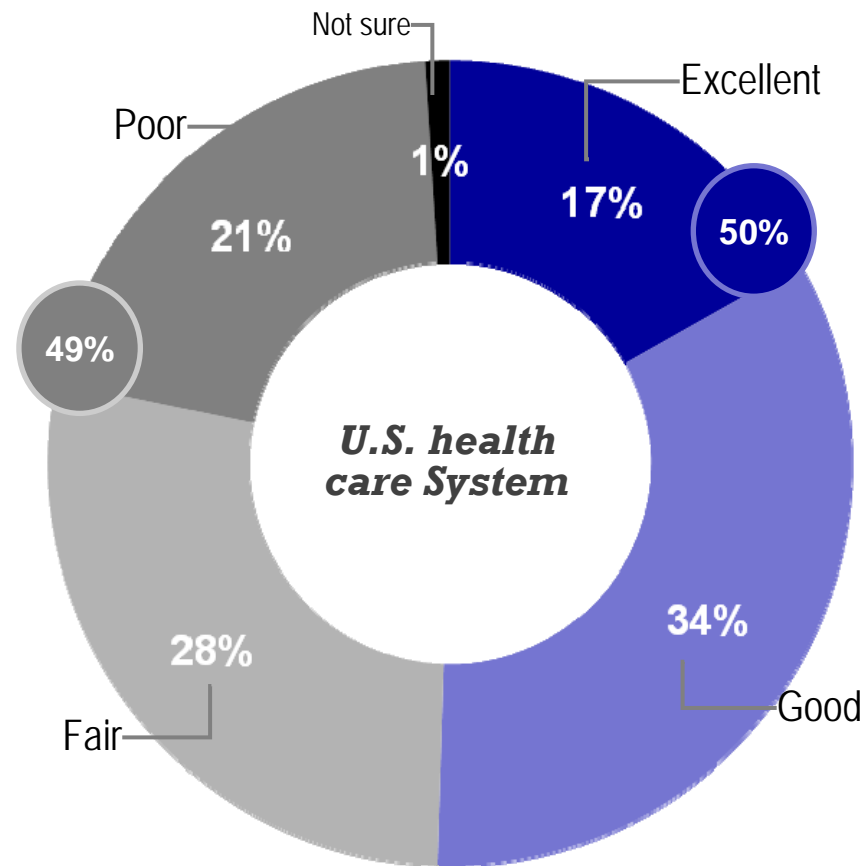
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Q3. When it comes to health care, which do you currently consider to be the most innovative country in the world?



There are mixed evaluations of the current U.S. health care system

- A similar percentage fall on either side of favorability for the current U.S. health care system.
- Most commonly, the U.S. health care system is seen as “good,” but this number is still only 1 in 3.



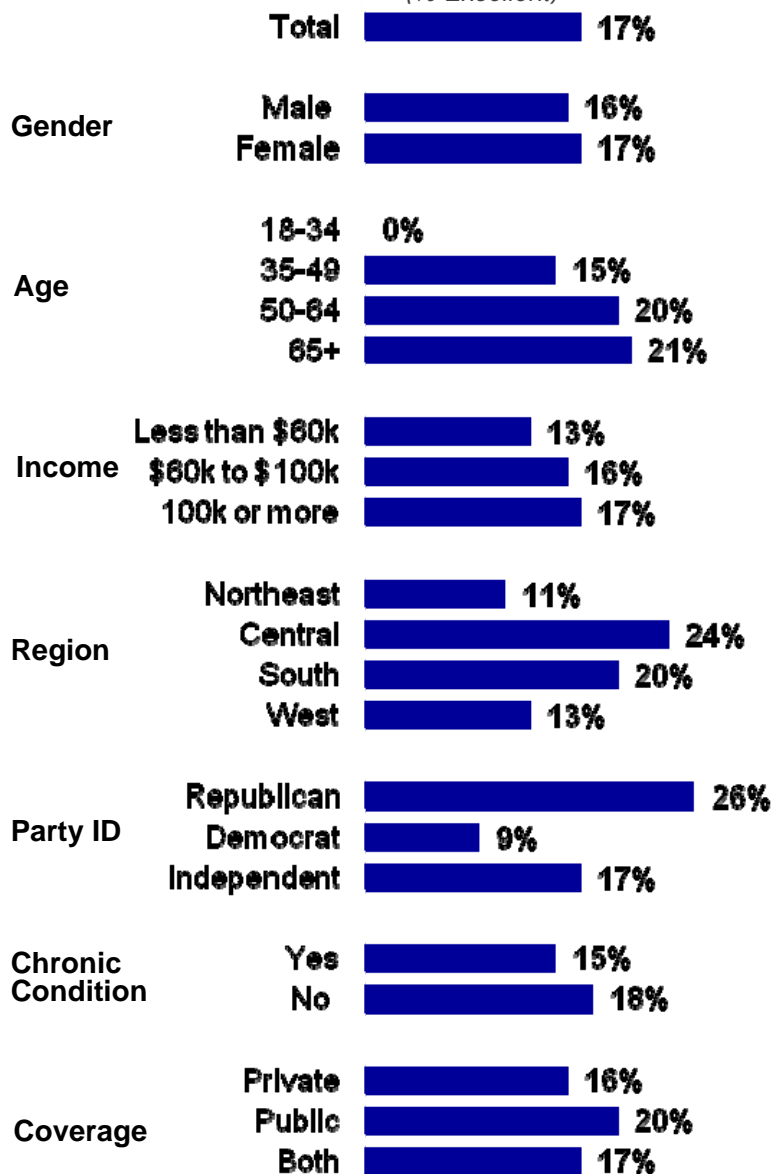
Q4. Overall, how do you evaluate the current health care system in this country? Is the US health care system:



Evaluation of U.S. Health Care System

Demographic Detail

U.S. health care system evaluation
(% Excellent)



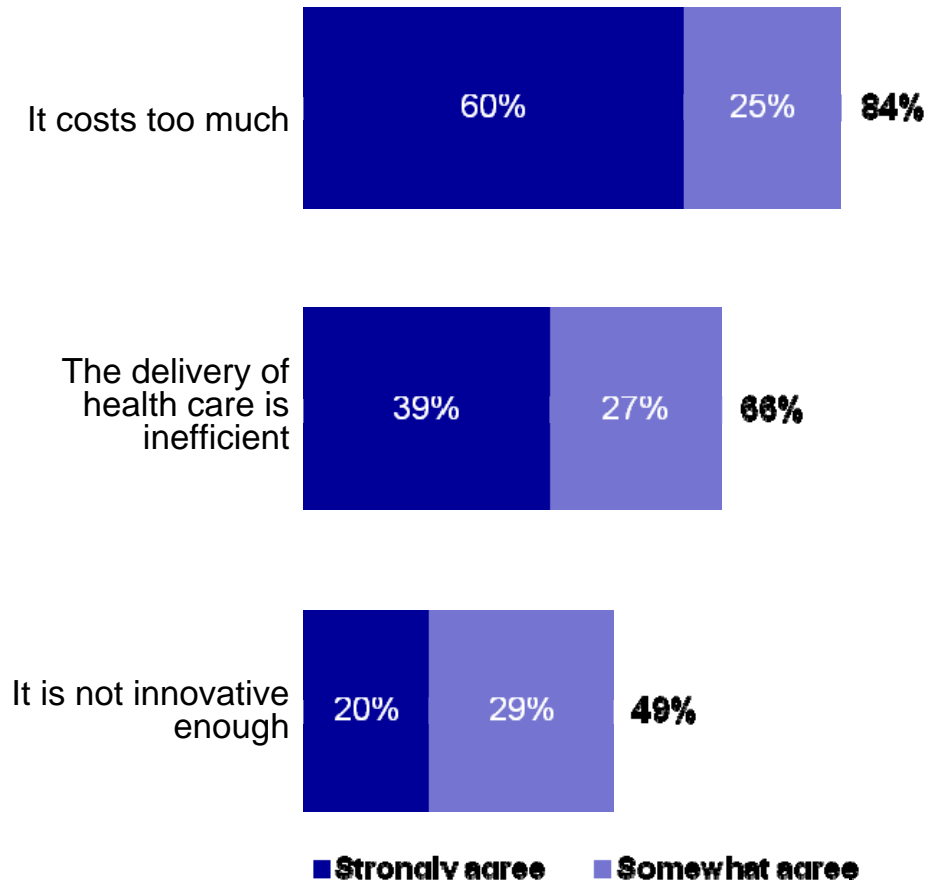
- Republicans rate the system as “excellent” at almost a 3:1 rate when compared to Democrats.
- In fact, Democrats have a pessimistic outlook of current US health care system. A majority of Democrats (68%) rate the U.S. health care system as “fair” or “poor”, significantly more than their political counterparts (36% of Republicans and 39% of Independents).

Q4. Overall, how do you evaluate the current health care system in this country? Is the US health care system:



Overwhelming agreement that soaring costs are putting America's health care at risk

Why the future of health care in America is at risk



- Concerns for mounting health care costs is strong with a majority reporting they “strongly agree.”
- The majority also agree the future of U.S. health care is at risk because “the delivery of health care is inefficient.”
- Division on whether the future of U.S. health care is at risk because “it is not innovative enough.”
 - 49% agree and 43% disagree with similar levels of intensity.

Q5. Some people say the future of health care in America is at risk. As I read a few statements, please tell me how much you agree with each for why the future of health care in America is at risk: strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree?



Reasons U.S. Health Care is at Risk

Demographic Detail

- With the exception of Republicans, the majority of all assessed demographics believe healthcare to be at risk because of its high expense.
- Intensity of agreement on soaring health care costs differs among party lines: significantly more Democrats and Independents “strongly agree” than Republicans.
- Significantly fewer Republicans agree that “the delivery of health care is inefficient” than their political counterparts.

Why the future of health care in America is at risk (% Strongly agree)

Shading = highest rank

	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
	n=500	237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
It costs too much	60	56	62	50	68	62	52	77	65	53	56	52	62	70	45	69	62	62	59	62	53	64
The delivery of health care is inefficient	39	38	41	75	32	41	27	44	39	43	44	37	36	41	22	49	45	35	44	41	26	28
It is not innovative enough	20	18	22	25	19	18	22	30	26	13	19	20	15	30	19	24	18	17	23	21	21	17

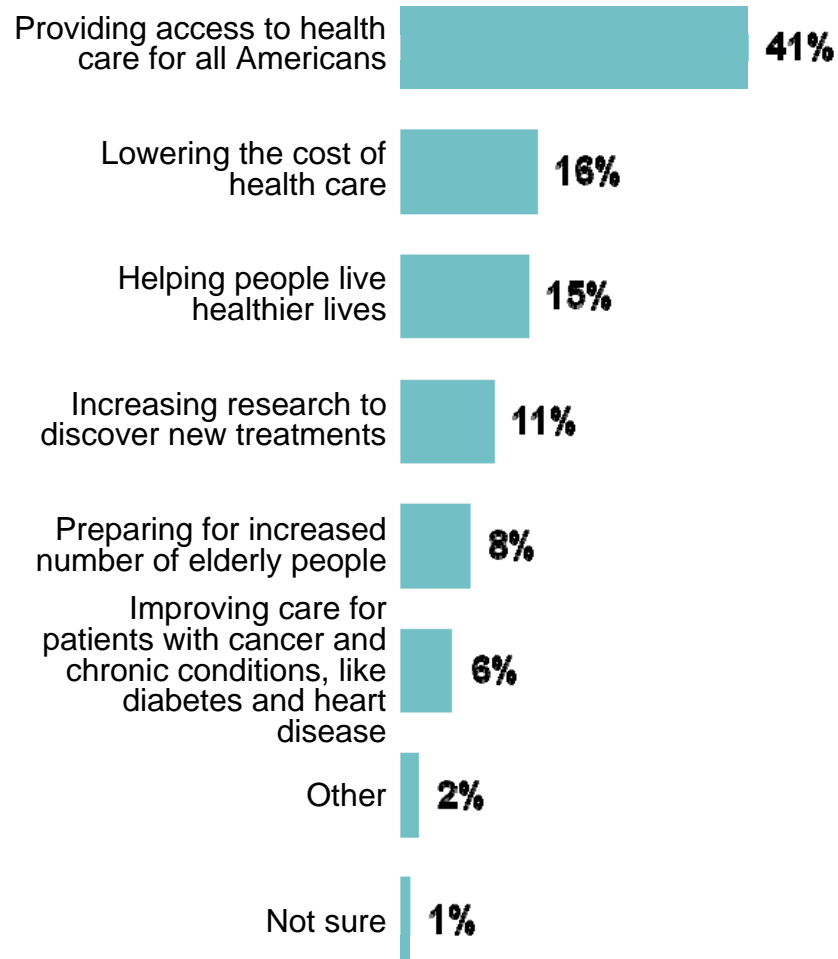
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Q5. Some people say the future of health care in America is at risk. As I read a few statements, please tell me how much you agree with each for why the future of health care in America at risk: strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree?



Many want an innovative solution to universal access to health care

The most important health care challenges to address with an innovative solution



- Ranked first among a forced-list range of options, universal access is the most important health care challenge to address with an innovation solution.
- Exceeds the next leading health care challenge, “lowering the cost of health care,” by more than a 2:1 margin.

Q6. In your view, for which one of the following health care challenges is it most important to address with an innovative solution?



Most Important Challenge to Address with Innovation

- Both Democrats and Independents rank universal access as most important, but not Republicans. Of the forced-list, Republicans rank it second to last with a similar score to “improving care for cancer and chronic patients.”
- 3-in-4 Democrats say universal access is most important.
- Significantly fewer respondents in the Central region say access for all Americans is most important. In fact, for Midwesterners, health care access for all Americans and lowering health care costs are seen as equally important.

Most important health care challenges to address with an innovative solution (% each)
 Shading = highest rank

	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
	n= 500	237	263	8*	73	172	233	107	134	179	136	↓ 115	145	102	↓ 147	↑ 157	180	242	246	296	108	45*
Providing access to health care for all Americans	41	36	46	62	38	39	36	44	48	37	45	28	44	45	10 ↓	76	32	42	42	42	44	31
Lowering the cost of health care	16	19	14	-	21	17	19	20	14	13	15	26	11	17	19	6	23	18	15	16	18	21
Helping people live healthier lives	15	15	15	25	14	16	11	10	8	24	16	15	14	17	20 ↓	10	18	11	18	16	9	16
Increasing research to discover new treatments	11	13	9	12	11	9	12	10	10	11	12	10	13	7 ↑	19	2	13	11	11	11	11	11
Preparing for increased number of elderly people	8	10	7	-	7	11	11	8	7	9	7	13	8	7	20	3	6	10	7	8	10	11
Improving care for patients with cancer & chronic conditions	6	5	6	-	5	7	7	7	7	4	2	7	8	6	9	1	7	6	6	6	4	9

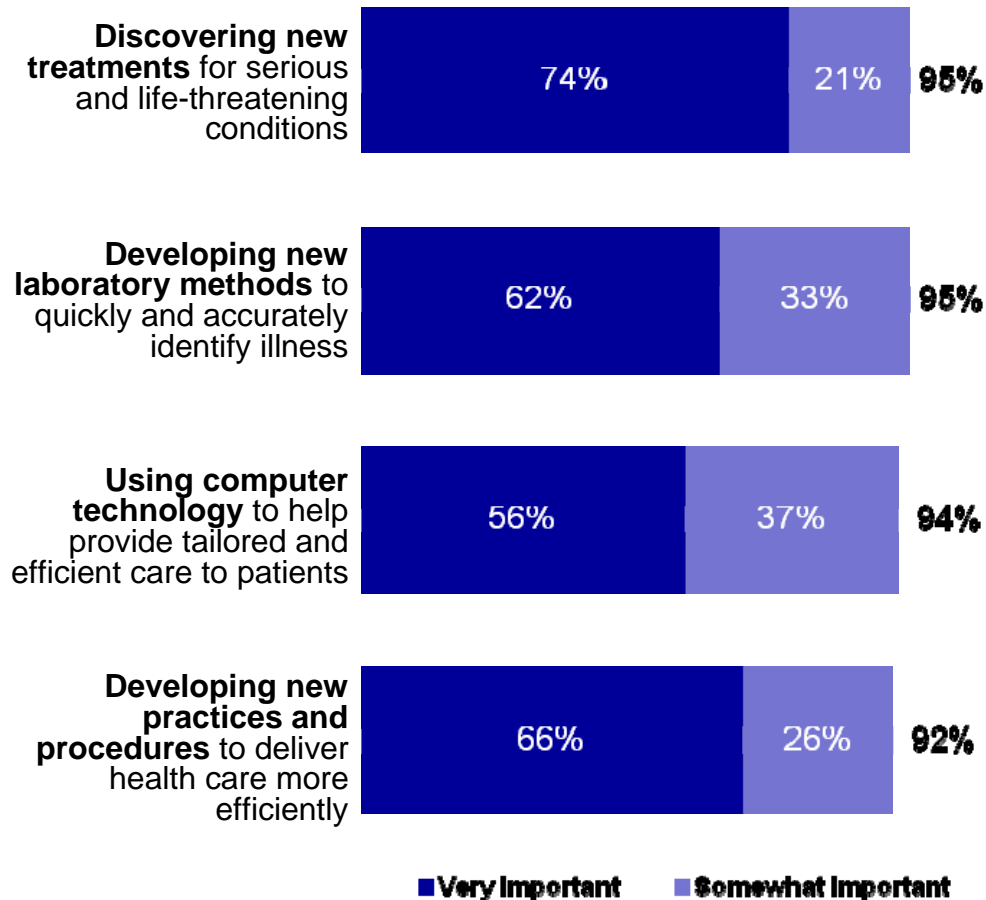
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Q6. In your view, for which one of the following health care challenges is it most important to address with an innovative solution?



All of the assessed examples of health care innovation are important

Important aspects of innovation in health care



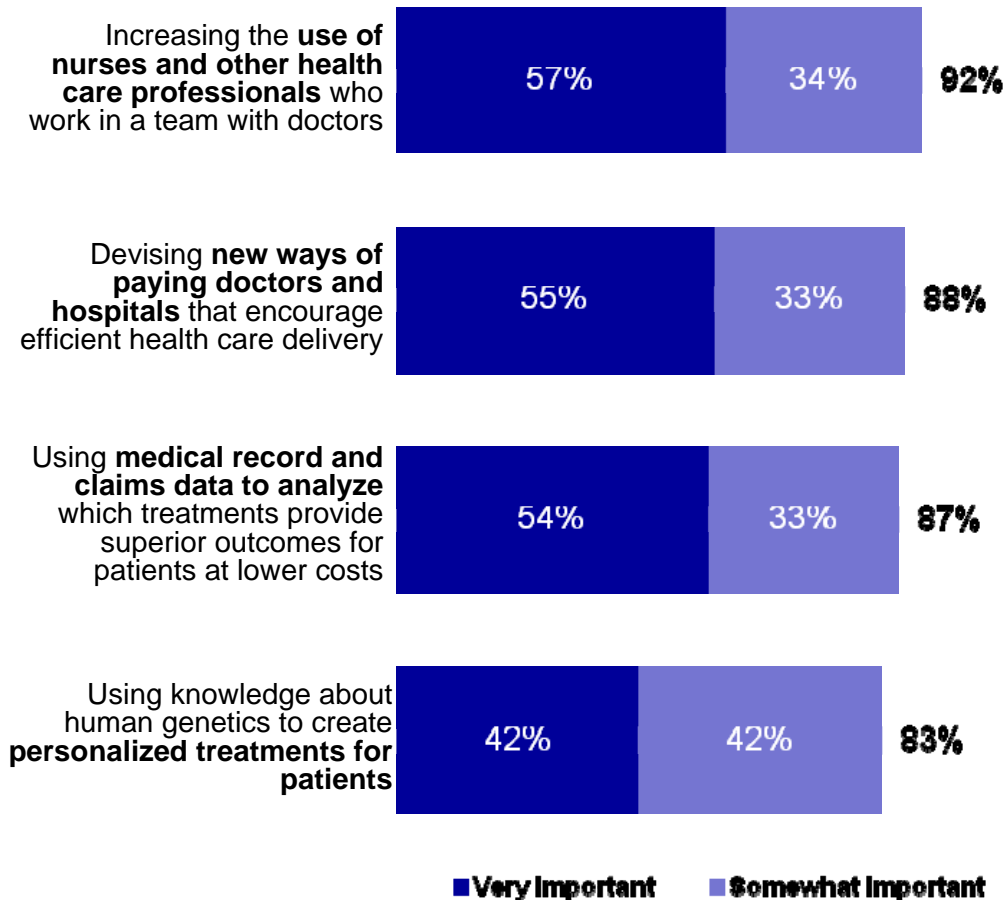
- Ranging from 83% to 95% agreement, the majority find all aspects of health care innovation to be important.
- In particular, “discovering new treatments for serious and life-threatening conditions” is viewed as most important with 3-in-4 saying this is “very important” to them.

Q7. When people talk about health care innovation, many different aspects may be considered. As I read you a list of areas where people are working on innovation in health care, please tell me how important each is to you? Is it very important, somewhat important, not too important or not at all important?



All of the assessed examples of health care innovation are important (cont'd)

Important aspects of innovation in health care



- Ranging from 83% to 95% agreement, the majority find all aspects of health care innovation to be important.

Q7. When people talk about health care innovation, many different aspects may be considered. As I read you a list of areas where people are working on innovation in health care, please tell me how important each is to you? Is it very important, somewhat important, not too important or not at all important?



Important Aspects of Innovation

Demographic Detail

- Almost all demographic subgroups say “discovering new treatments for serious and life-threatening conditions” is most important.

Important aspects of innovation in health care (% Very important) <i>Shading = highest rank</i>	Total n=	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
		237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
Discovering new treatments for serious and life-threatening conditions	74	66	81	75	77	72	74	86	79	64	69	71	80	74	74	79	68	79	69	76	70	83
Developing new practices and procedures to deliver health care more efficiently	66	63	69	50	73	66	68	76	69	61	57	75	63	74	53	75	68	69	63	66	68	70
Developing new laboratory methods to quickly and accurately identify illness	62	60	65	38	68	65	67	77	72	54	63	68	61	60	56	62	68	65	61	61	66	73
Increasing the use of nurses and other health care professionals who work in a team with doctors	57	52	62	62	49	57	60	69	60	48	59	52	58	58	50	68	50	56	59	56	63	53
Using computer technology to help provide tailored and efficient care to patients	56	58	55	75	48	56	57	66	60	51	58	50	61	54	42	73	51	61	54	58	60	66
Devising new ways of paying doctors and hospitals that encourage efficient health care delivery	55	48	61	50	58	58	53	68	62	48	53	56	55	56	50	60	54	57	54	57	54	55
Using medical record and claims data to analyze which treatments provide superior outcomes for patients at lower costs	54	64	44	62	58	51	50	70	50	50	60	46	56	49	42	62	54	51	55	54	53	55
Using knowledge about human genetics to create personalized treatments for patients	42	39	44	38	48	37	43	50	49	33	37	41	49	38	35	51	39	44	40	43	40	54

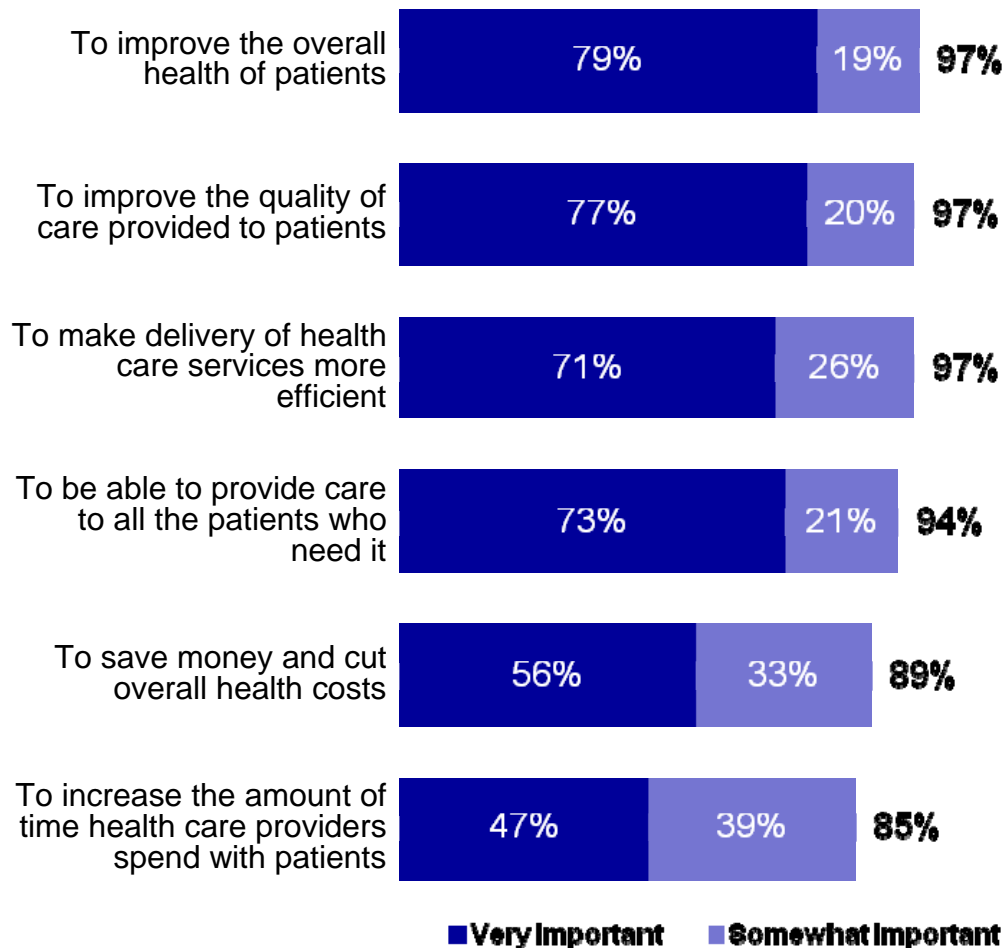
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Q7. When people talk about health care innovation, many different aspects may be considered. As I read you a list of areas where people are working on innovation in health care, please tell me how important each is to you? Is it very important, somewhat important, not too important or not at all important?



Innovation is a way “to improve the overall health” and “quality of care” to patients

Innovation is important...



- Across a range of reasons, innovation is considered important to the majority.

Q8. Some believe the overall health care system in the US should be improved through innovation. Please tell me how important each reason is regarding why innovation in health care is important: Is it very important, somewhat important, not too important or not important at all?



Reasons Health Care Innovation is Important

Demographic Detail

- While previously, Republicans report that universal health care is not the most important issue to address with an innovative solution, that doesn't mean its unimportant. In fact, over half say innovation is important in health care in order to provide care to all in-need patients, a proportion that is statistically comparable to Independents but significantly fewer than Democrats.
- Across attributes, Democrats are more likely to see innovation as important at a higher rate than their counterparts.

Important is important... (% Very important)	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep	Dem.	Ind.	Yes	No	Private	Public	Both
To improve the overall health of patients	79	74	83	100	73	76	76	73	80	79	85	75	77	75	72	88	73	77	80	80	72	81
To improve the quality of care provided to patients	77	76	78	88	79	72	76	82	83	73	83	71	82	67	64	89	75	79	76	76	81	73
To be able to provide care to all the patients who need it	73	67	79	88	66	73	73	81	77	69	73	63	78	75	57	92	66	70	71	73	76	73
To make delivery of health care services more efficient	71	76	66	88	64	70	69	75	70	70	78	65	64	74	62	74	75	63	76	69	73	66
To save money and cut overall health costs	56	58	55	38	66	59	53	55	65	49	45	61	62	59	59	52	57	54	58	58	47	66
To increase the amount of time health care providers spend with patients	47	37	56	62	49	35	49	60	54	35	44	47	52	45	42	55	43	47	46	47	50	40

*Due to small base sample sizes, not included in significance testing.

Q8. Some believe the overall health care system in the US should be improved through innovation. Please tell me how important each reason is regarding why innovation in health care is important: Is it very important, somewhat important, not too important or not important at all?



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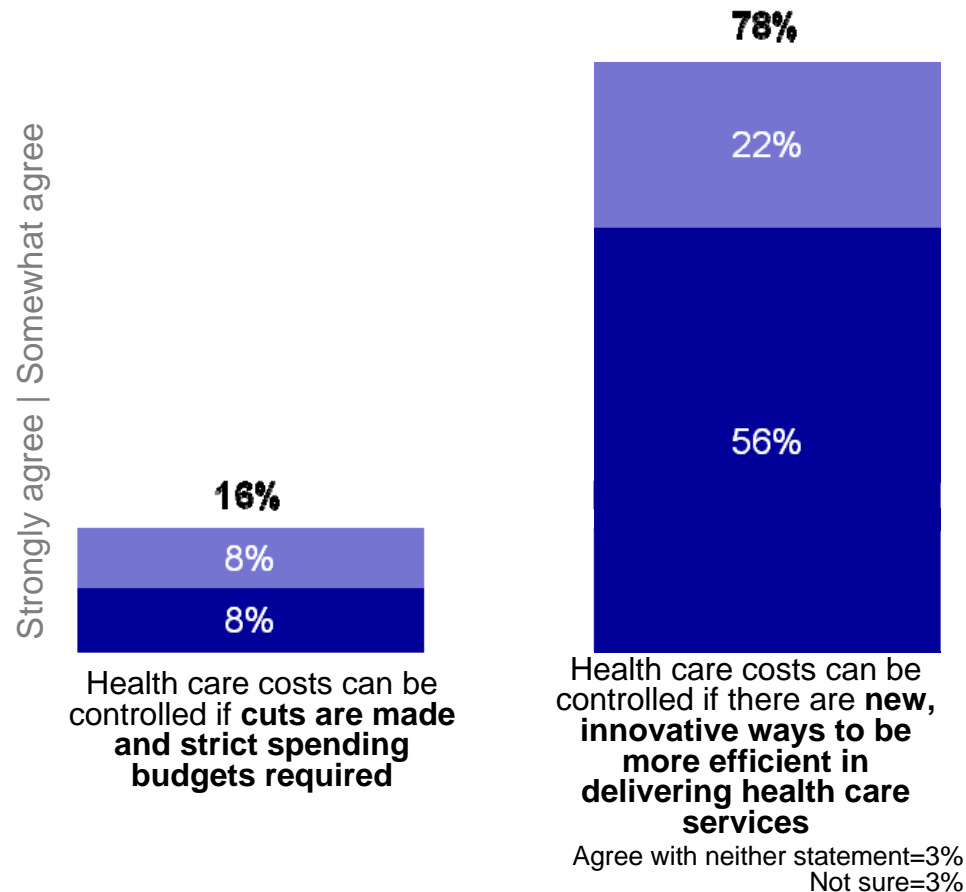
METHODOLOGY



Innovation is the preferred approach to control health care spending, not budget cuts

- By more than a 4:1 margin, the majority believe in innovative efficiency over budget cuts and restrictions.

Which way to control health care costs do you agree with more?



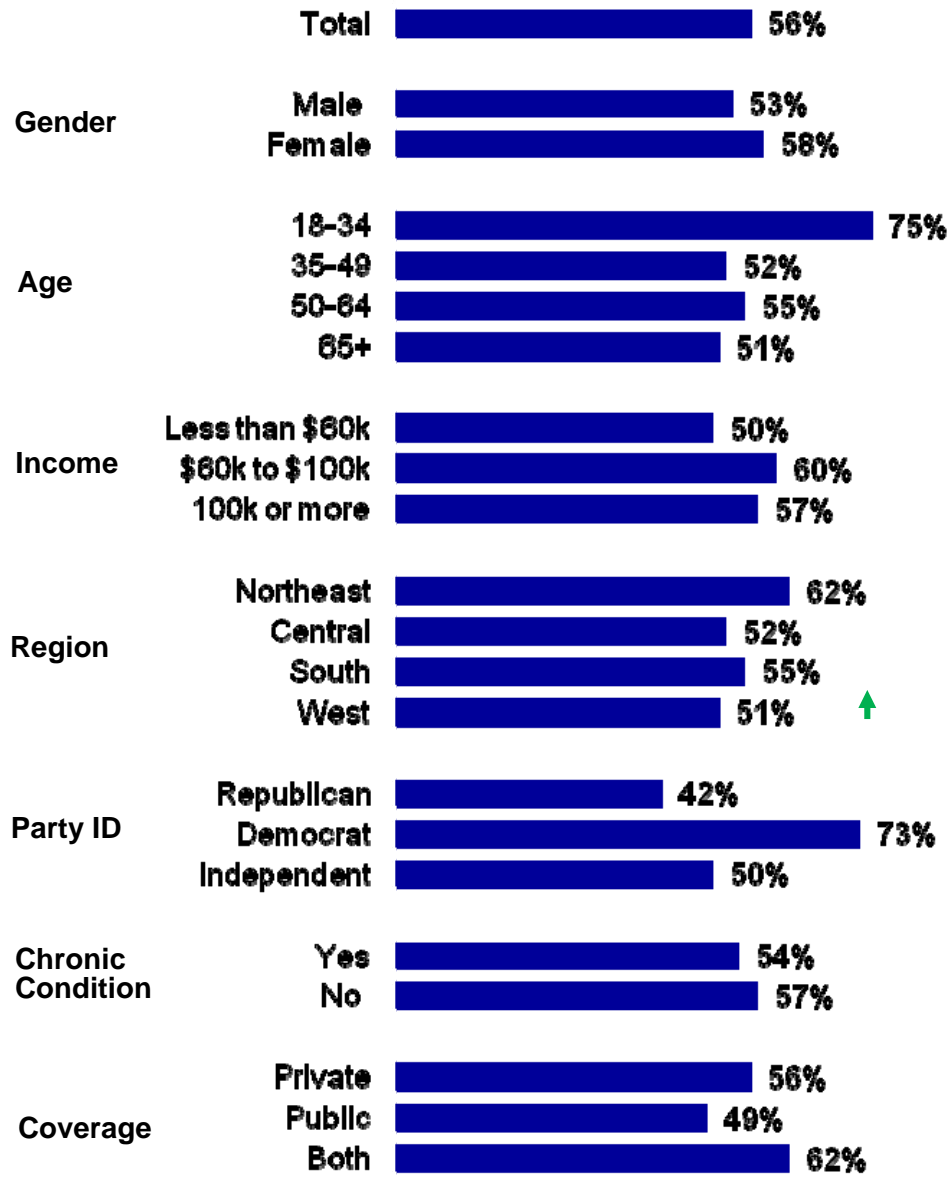
Q9. In your view, which of the following statements about ways to control health care costs do you agree with more... Do you strongly or somewhat agree with that statement?



Preferred Way to Control Health Care Costs

Demographic Detail

Which way to control health care costs do you agree with more?
(% Strongly agree with innovation over budget cuts)



- Democrats are the strongest party supporters for innovation rather than budget cuts.

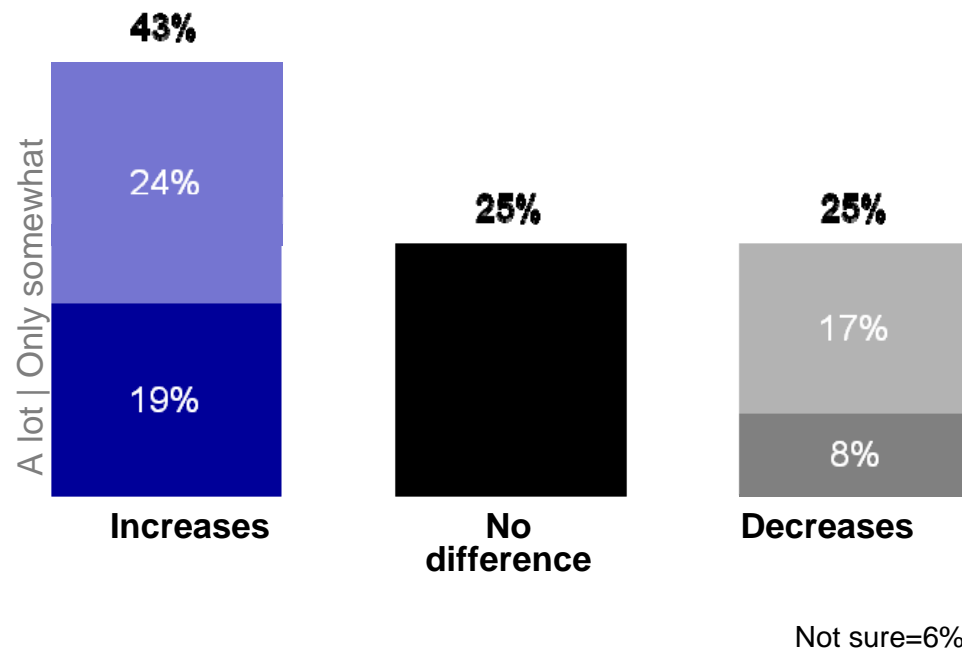
Q9. In your view, which of the following statements about ways to control health care costs do you agree with more... Do you strongly or somewhat agree with that statement?



Most believe innovation has a price

- More believe innovation will increase than decrease overall health care spending.
- However, a quarter of opinion leaders say innovation will make “no difference” to overall health care spending.

Innovation’s impact on health care spending



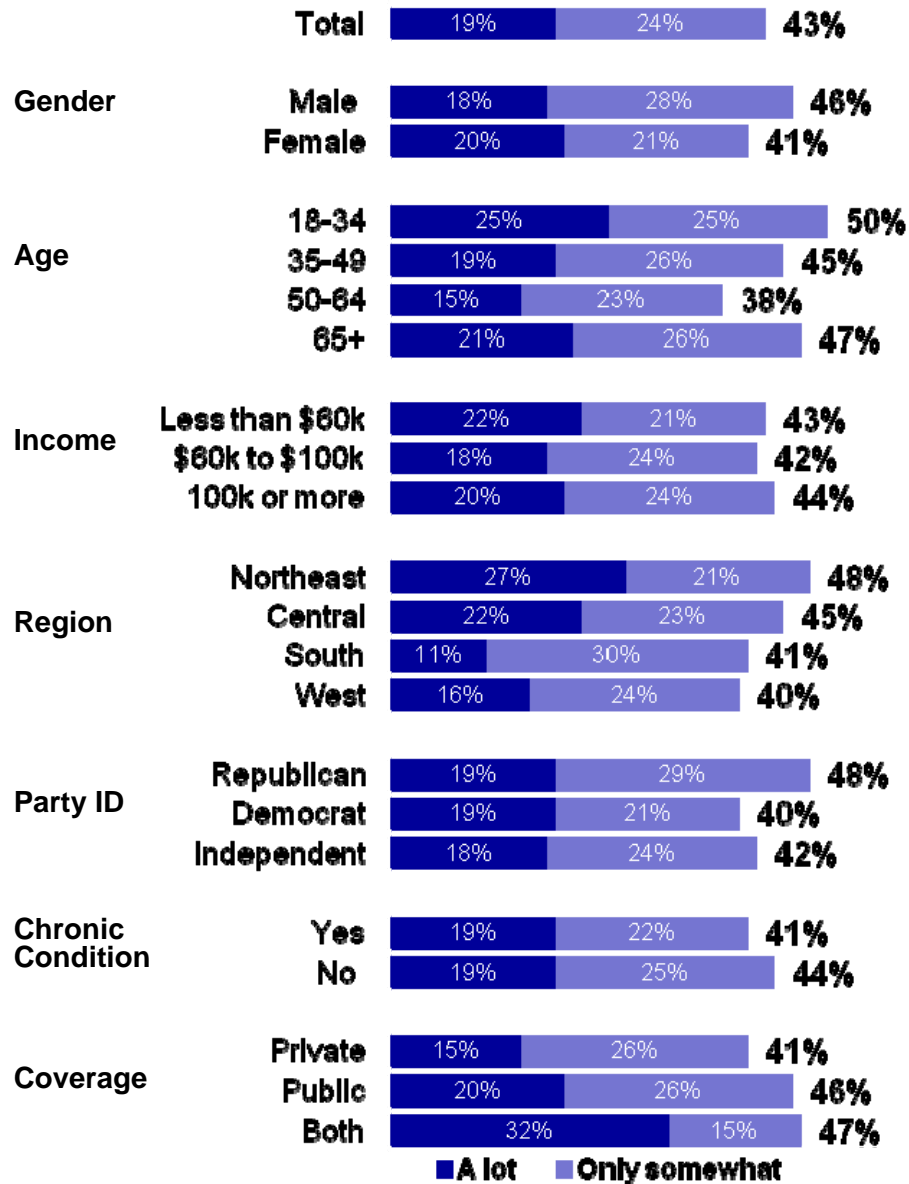
Q10. From what you know, does “innovation” increase or decrease overall health care spending – or does it make no difference? Does it (increase/decrease) overall health care spending a lot or only somewhat?



Impact of Innovation Health Care Spending

Demographic Detail

Innovation's impact on health care spending
(% Increases)



- Across demographic subgroups, there is consistency in the rate who say innovation will increase overall health care spending.
- Of note: those over 64 are most likely to be undecided on how innovation impacts health care spending, with at least a 2:1 margin saying they are “unsure” (12%).

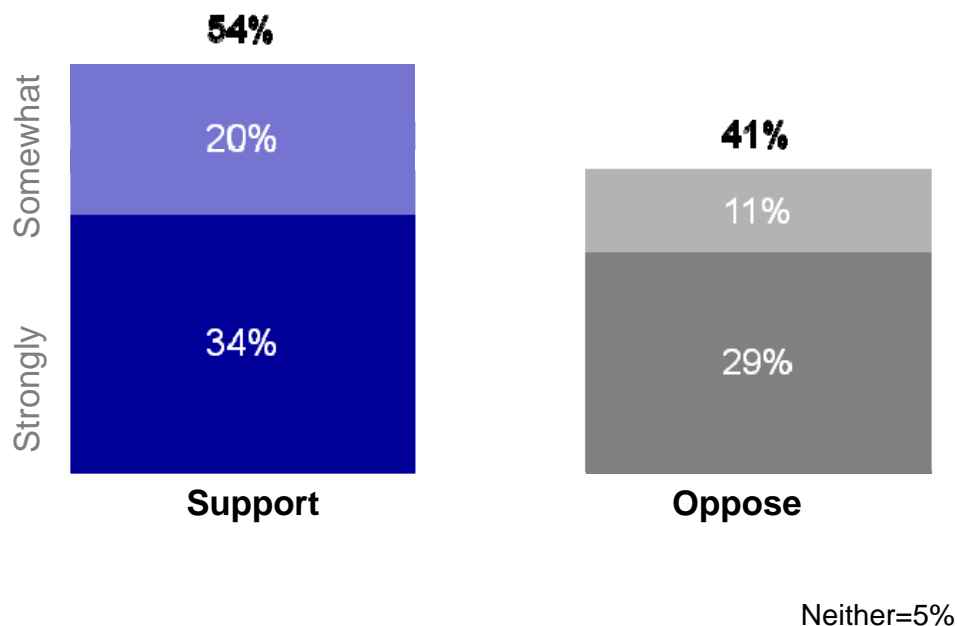
Q10. From what you know, does “innovation” increase or decrease overall health care spending – or does it make no difference? Does it (increase/decrease) overall health care spending a lot or only somewhat?



Opinion leaders support near-term gov't action, even if it increases the deficit

- The majority support government actions to improve the overall system, even if it increases the federal deficit in the short term.
- This concept is polarizing, with the largest proportions of supporters or opponents reporting strong sentiments for their position.

Position on government actions to improve U.S. health care, even if federal deficit increases in the short term



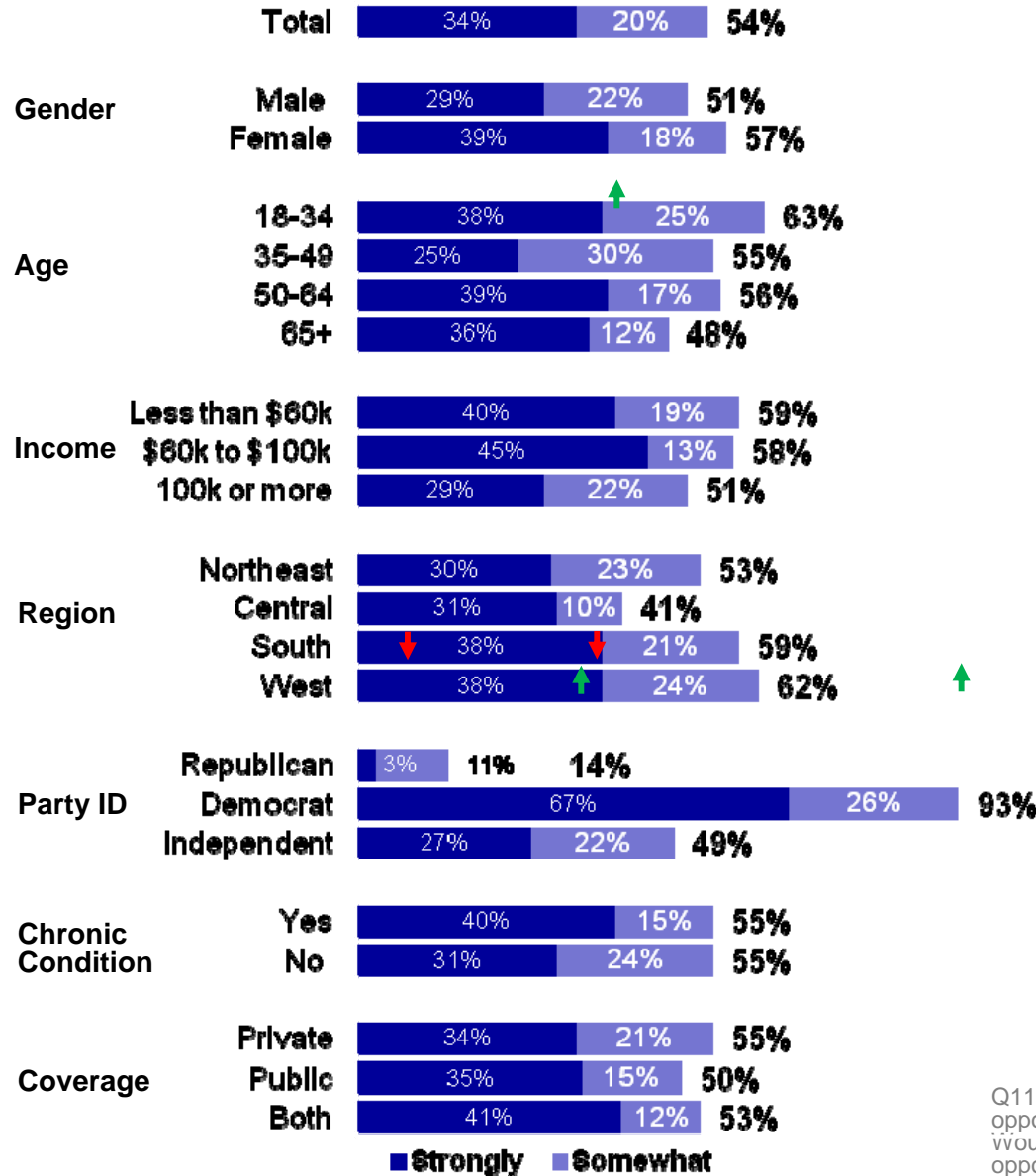
Q11. When it comes to improving the overall US health care system, would you support or oppose government actions even if they increased the federal deficit in the short term? Would you strongly support, somewhat support, neither support nor oppose, somewhat oppose or strongly oppose?



Position on Government Action – Even if Increases Deficit

Demographic Detail

Position on government actions to improve U.S. health care, even if federal deficit increases in the short term (% Support)



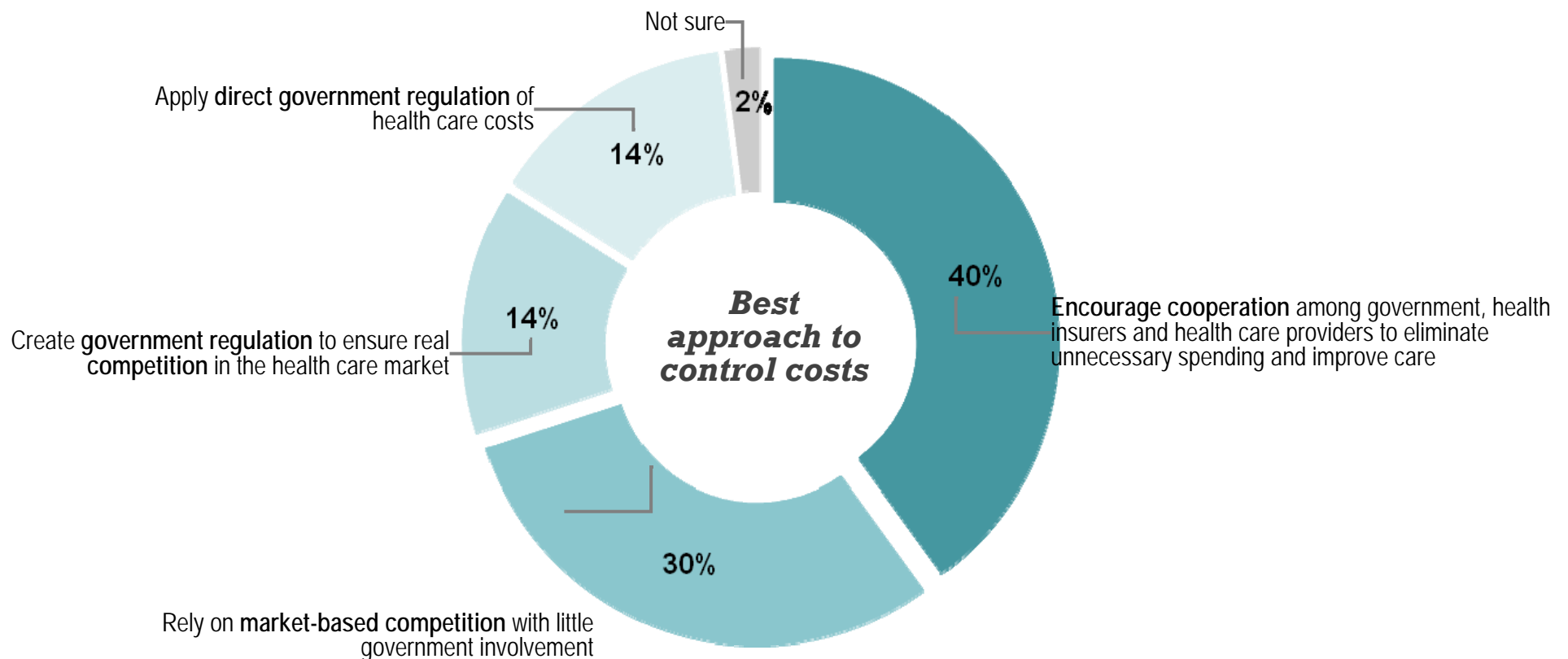
- Position is split across party lines with almost all Democrats (93%) supporting near-term investment and a strong majority of Republicans (79%) opposing it.
- Independents are divided with 48% in favor and 46% opposed.

Q11. When it comes to improving the overall US health care system, would you support or oppose government actions even if they increased the federal deficit in the short term? Would you strongly support, somewhat support, neither support nor oppose, somewhat oppose or strongly oppose?



Favor an involved, yet indirect, government approach to control health care costs

- A plurality prefer a collaborative, multi-stakeholder approach to controlling health care costs.
- Government regulation is preferred among a minority: 14% seeking direct regulation of costs; 14% preferring government regulation of competition in the health care market.



Q12. Many approaches have been suggested for controlling U.S. health care costs. Which of the following statements best describes which you feel is the best approach to control health care costs:



Best Approach to Control Health Care Cost

Demographic Detail

- Democrats and Independents are the biggest party advocates for encouraging cooperation among involved parties.
- Notably, 1-in-4 Democrats believes the best approach is to apply direct government regulation of health care costs.
- Republicans and Independents drive the preference to rely on market-based competition.

Best approach to control costs (% each)	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
		n=	237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108
Encourage cooperation among government, health insurers and health care providers to eliminate unnecessary spending and improve care	40	34	45	38	36	43	39	48	40	39	48	40	33	38	20	56	39	44	37	40	41	39
Rely on market-based competition with little government involvement	30	31	30	12	37	26	38	29	28	31	23	35	34	31	63	3	30	33	27	29	37	36
Apply direct government regulation of health care costs	14	14	14	25	15	13	9	12	19	9	6	7	21	23	2	26	12	9	17	15	9	6
Create government regulation to ensure real competition in the health care market	14	19	8	25	12	13	10	7	12	18	21	13	11	6	13	12	16	11	16	15	8	16

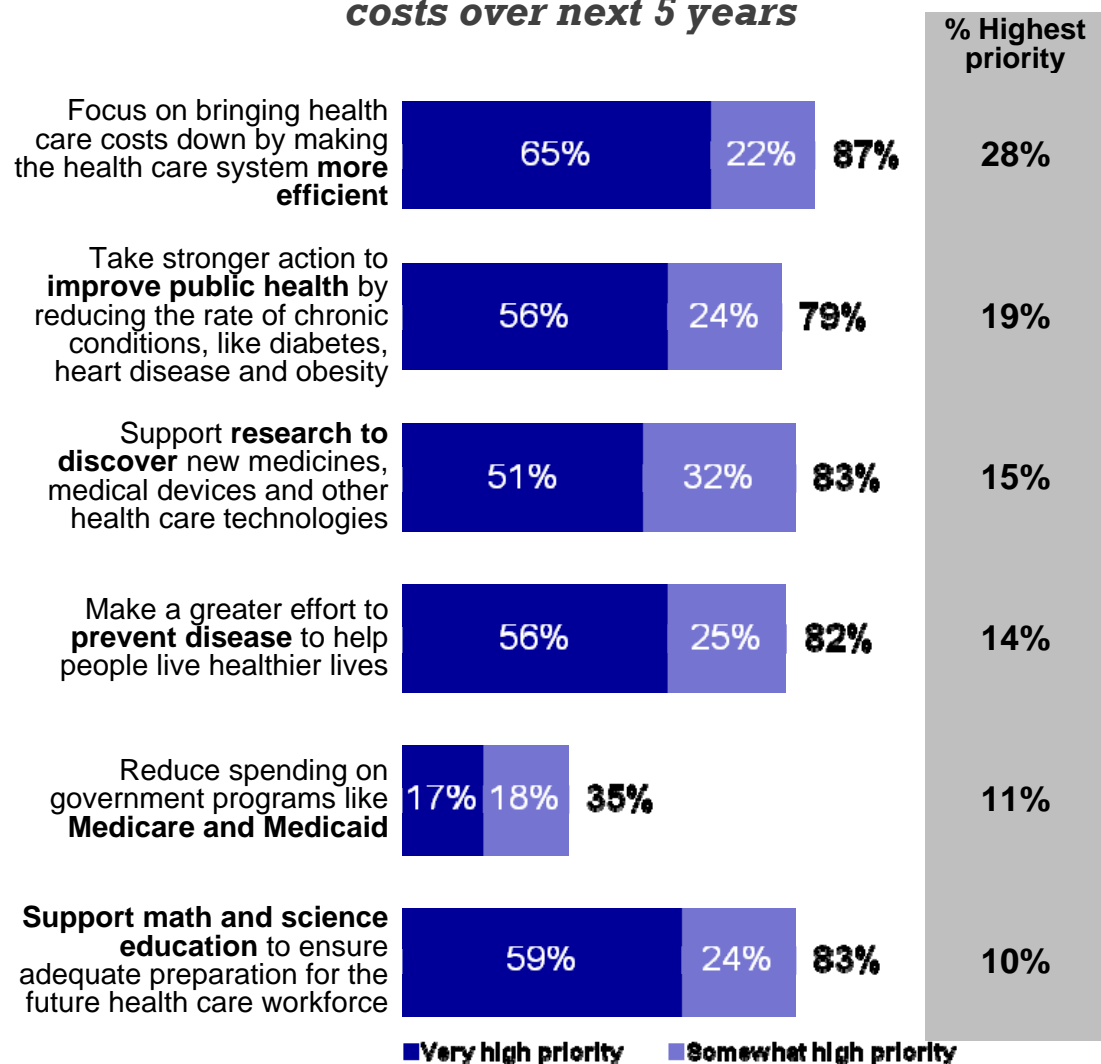
*Due to small base sample sizes, not included in significance testing.

Q12. Many approaches have been suggested for controlling U.S. health care costs. Which of the following statements best describes which you feel is the best approach to control health care costs:



Improving efficiency can decrease health care costs; it is a top priority

Government priorities for controlling costs over next 5 years



- A vast majority say controlling health care costs through efficiency is a high priority for government.
- A plurality rank efficiency as the most important government approach for controlling costs.

Q13. Over the next five years, what should the priorities for government be to control health care costs? As I read you some options, please rate the priority of each as government works to control health care costs: a very high priority, somewhat high priority, neither high nor low priority, somewhat low priority or very low priority?
 Q14. [AFTER RATING ALL, ASK]: And, which one option should be the highest government priorities for controlling health care costs?



Priority for Gov't to Control Health Care Costs

Demographic Detail

- Significantly fewer opinion leaders over 50 or in the South see reducing spending on Medicare and Medicaid as a very high priority.
- In general, Democrats see the governments role in controlling costs as a higher priority, the exception being reducing spending on Medicare and Medicaid.

Government priority for controlling costs over next 5 years <i>(Shading = highest % priority)</i>	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent.	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
		n=																				
Focus on bringing health care costs down by making the health care system more efficient	500	237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
Support math and science education to ensure adequate preparation for the future health care workforce	59	56	62	75	58	60	53	60	60	58	64	57	53	65	47	71	57	55	62	61	52	57
Take stronger action to improve public health by reducing the rate of chronic conditions, like diabetes, heart disease and obesity	56	50	61	88	49	50	52	59	50	59	59	46	56	59	40	78	45	54	58	57	47	62
Make a greater effort to prevent disease to help people live healthier lives	56	50	62	88	49	51	52	56	52	59	62	44	59	56	46	75	45	53	59	58	55	53
Support research to discover new medicines, medical devices and other health care technologies	51	50	52	62	52	49	48	57	55	46	51	44	54	55	50	57	48	50	52	54	45	47
Reduce spending on government programs like Medicare and Medicaid	17	22	13	25	27	9	13	12	18	21	22	20	7	21	34	5	18	14	20	20	13	11

**Due to small base sample sizes, not included in significance testing.*

Q13. Over the next five years, what should the priorities for government be to control health care costs? As I read you some options, please rate the priority of each as government works to control health care costs: a very high priority, somewhat high priority, neither high nor low priority, somewhat low priority or very low priority?



Highest Gov't Priority to Control Health Care Costs

Demographic Detail

- Differences in opinion on what should be the government's highest priority are most notable among differing political parties and those who have a chronic condition.

Highest government priority for controlling costs over next 5 years <small>Shading = highest %</small>	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent..	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
Focus on bringing health care costs down by making the health care system more efficient	500	237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
	28	28	27	-	27	36	30	31	35	20	25	32	20	37	27	25	31	36	21	25	34	37
Take stronger action to improve public health by reducing the rate of chronic conditions, like diabetes, heart disease and obesity																						
	19	18	20	25	16	19	20	23	23	19	22	21	18	15	10	31	16	13	24	20	19	21
Support research to discover new medicines, medical devices and other health care technologies																						
	15	19	11	25	11	14	13	12	11	16	15	11	19	11	21	14	11	13	15	15	15	9
Make a greater effort to prevent disease to help people live healthier lives																						
	14	11	18	12	14	16	14	16	11	17	12	7	23	12	9	17	16	20	11	15	18	8
Reduce spending on government programs like Medicare and Medicaid																						
	11	12	10	25	15	6	7	6	8	16	12	12	8	12	24	1	12	7	14	13	7	4
Support math and science education to ensure adequate preparation for the future health care workforce																						
	10	8	11	12	15	7	8	7	10	10	11	13	8	7	7	10	11	7	11	8	3	11

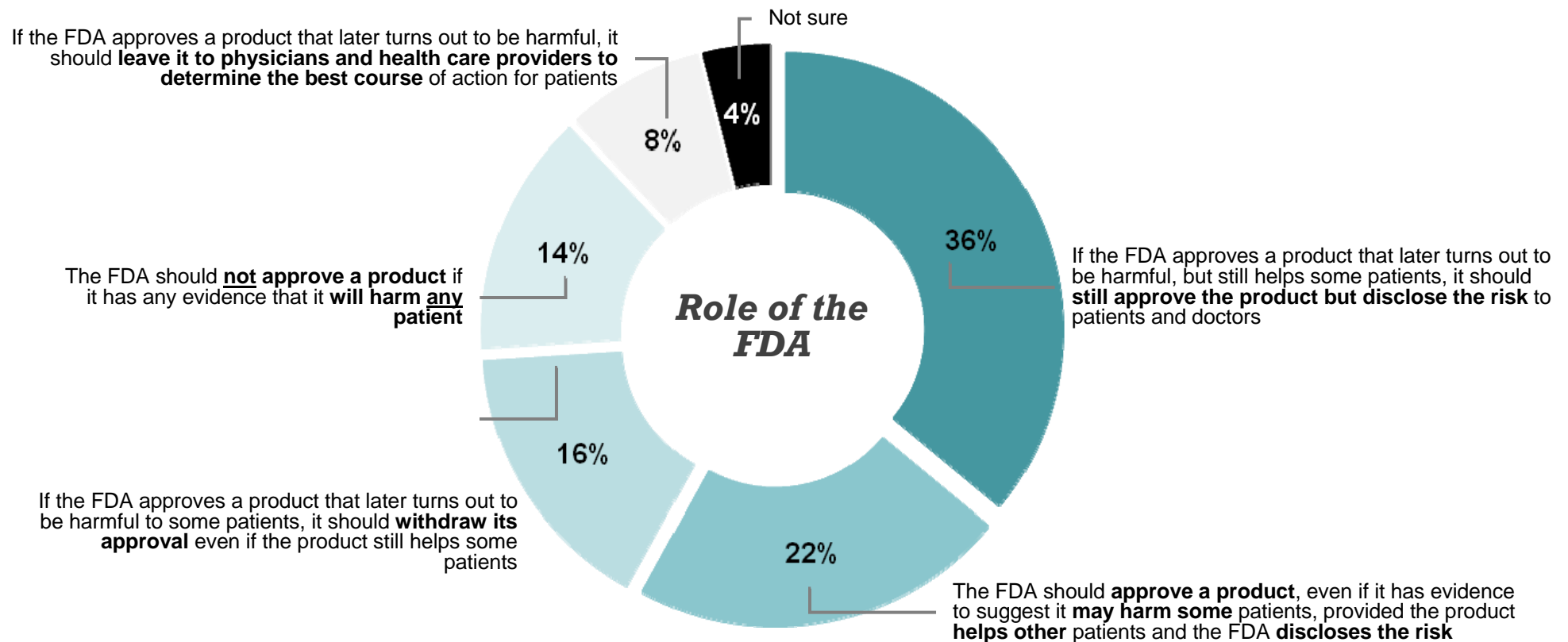
*Due to small base sample sizes, not included in significance testing.

Q14. [AFTER RATING ALL, ASK]: And, which one option should be the highest government priorities for controlling health care costs?



The critical role of the FDA: Disclose risks when it comes to drug approvals

- When presented several statements about the role of the FDA, opinion leaders favor approval of products but insist on the disclosure of risks to patients and doctors.
- Receiving the lowest levels of agreement, only 8% say the FDA should withdraw products that harm some patients but still help others.



Q16. As you may know, the US Food and Drug Administration, sometimes called the FDA, is responsible for approving new drugs and medical devices in the US so that they are safe and effective for use. I am going to read you several statements about the role of the FDA. After I finish reading all, please indicate which one statement you agree with most.



Preferred Role of FDA

Demographic Detail

- A plurality agree across almost all demographics that the FDA should still approve products but disclose risks.

Role of the FDA (% each)	Total n=	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent..	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
		237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
If the FDA approves a product that later turns out to be harmful, but still helps some patients, it should still approve the product but disclose the risk to patients and doctors	36	38	34	25	37	42	34	33	35	40	35	37	27	52	44	32	36	39	34	38	31	52
The FDA should approve a product, even if it has evidence to suggest it may harm some patients, provided the product helps other patients and the FDA discloses the risk	22	22	21	25	23	23	18	25	23	20	18	23	29	15	16	27	20	22	21	23	20	15
If the FDA approves a product that later turns out to be harmful, it should leave it to physicians and health care providers to determine the best course of action for patients	16	17	16	12	15	16	21	10	21	14	13	24	16	14	18	15	18	14	18	15	21	16
The FDA should not approve a product if it has any evidence that it will harm any patient	14	12	16	25	15	8	14	19	12	14	24	9	10	11	17	14	11	10	17	12	15	11
If the FDA approves a product that later turns out to be harmful to some patients, it should withdraw its approval even if the product still helps some patients	8	7	10	12	10	8	5	6	7	10	7	4	14	5	3	11	8	10	6	9	5	4

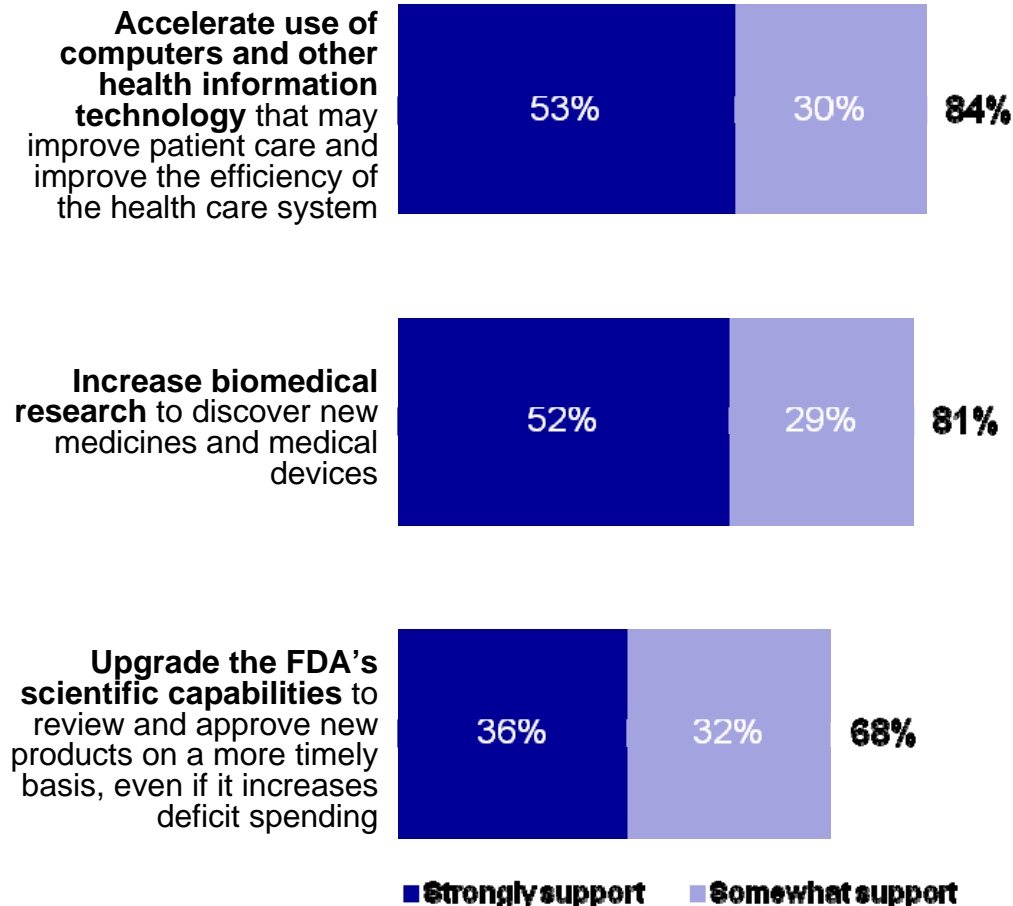
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Q16. As you may know, the US Food and Drug Administration, sometimes called the FDA, is responsible for approving new drugs and medical devices in the US so that they are safe and effective for use. I am going to read you several statements about the role of the FDA. After I finish reading all, please indicate which one statement you agree with most.



The majority support various Federal government proposals to address health care needs

Support for government proposals



- A strong majority supports all assessed federal government's proposals.

Q17. And, please tell me how much you support or oppose each of the following proposals regarding the role of the federal government. Do you strongly support, somewhat support, neither support nor oppose, somewhat oppose or strongly oppose...

Position on Various Federal Gov't Proposals

Demographic Detail

- Across party lines, there is more support than opposition to the various Federal government proposals.
- In particular, Democrats are the strongest advocates with at least half and up to three-quarters saying they “strongly support” each initiative.

Support for government proposals (% Strongly support)	Total	Gender		Age				Income			Region				Party ID			Condition		Coverage		
		M	F	18-34	35-49	50-64	65+	Under \$60K	\$60-100K	Over \$100K	NE	Cent..	South	West	Rep.	Dem.	Ind.	Yes	No	Private	Public	Both
		n=																				
Accelerate use of computers and other health information technology that may improve patient care and improve the efficiency of the health care system	500	237	263	8*	73	172	233	107	134	179	136	115	145	102	147	157	180	242	246	296	108	45*
	53	5	55	62	45	56	54	54	57	56	53	57	54	51	43	70	45	59	51	51	54	60
Increase biomedical research to discover new medicines and medical devices	52	49	55	75	47	51	50	52	56	52	55	44	61	45	40	73	43	53	53	53	46	57
Upgrade the FDA's scientific capabilities to review and approve new products on a more timely basis, even if it increases deficit spending	36	3%	33	50	25	39	37	38	40	31	33	33	42	34	17	54	35	37	37	38	40	25

*Due to small base sample sizes, not included in significance testing.

Q17. And, please tell me how much you support or oppose each of the following proposals regarding the role of the federal government. Do you strongly support, somewhat support, neither support nor oppose, somewhat oppose or strongly oppose...



KEY FINDINGS

BACKGROUND & OBJECTIVES

DETAILED FINDINGS

INNOVATION BAROMETER

2012 FOCUS: COST CONTAINMENT

METHODOLOGY



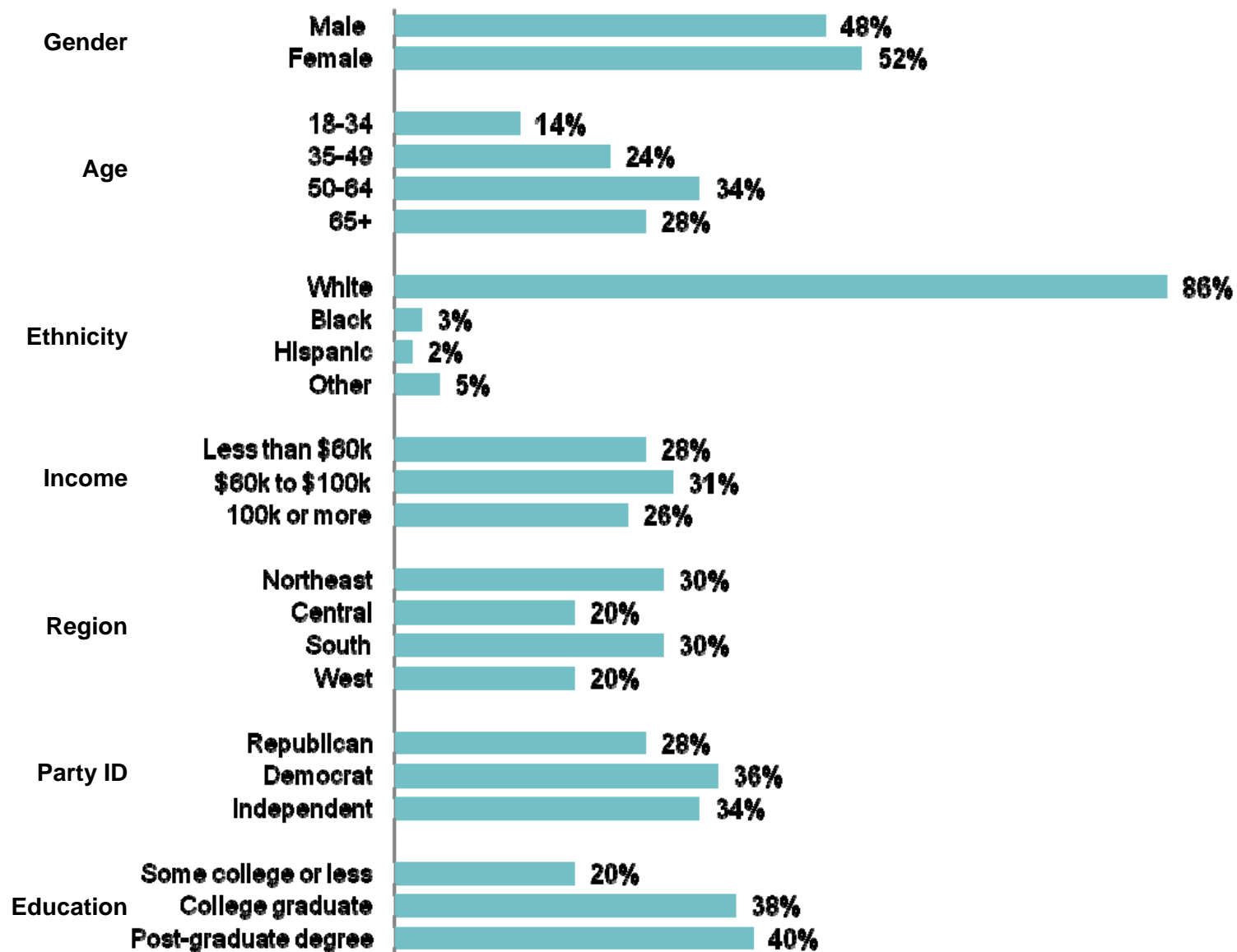
Detailed Methodology

- APCO Insight, the opinion research consultancy of APCO Worldwide, designed and conducted *The NEHI Innovation Barometer*, sponsored by NEHI in partnership with Ernst and Young.
- The research, conducted via telephone, surveyed opinion leaders in the United States.
- For the purposes of this survey, opinion leaders are defined as members of the general public who regularly read national or local newspapers, closely follow current events in the health care industry and recently voted in an election.
- Landline and mobile telephone numbers were called via random-digit-dialing (RDD) using a purchased sample list of randomly selected households in the United States. Sample was provided by Marketing System Group, a professional sample provider.
- Due to the discrete nature of this population, demographic data on opinion leaders in the United States is unknown. After reviewing the surveyed demographic profiles, data was weighted by age to make best attempts to reflect the population. Weighting estimates were taken from longitudinal quantitative research data conducted by APCO Insight among this population.

Eligibility:	Read national or local newspapers, either in print or online, every day or most days. Closely follow news surrounding the health care or biopharmaceutical industry. Voted in a national or local election in the past two years
Sample Size:	n=500
Sampling error:	±4.4% at 95% confidence interval
Weighting:	Weighted by age to reflect longitudinal health care opinion leader population data
Data Collection:	Telephone (RDD)
Field Dates:	March 22 - 28, 2012

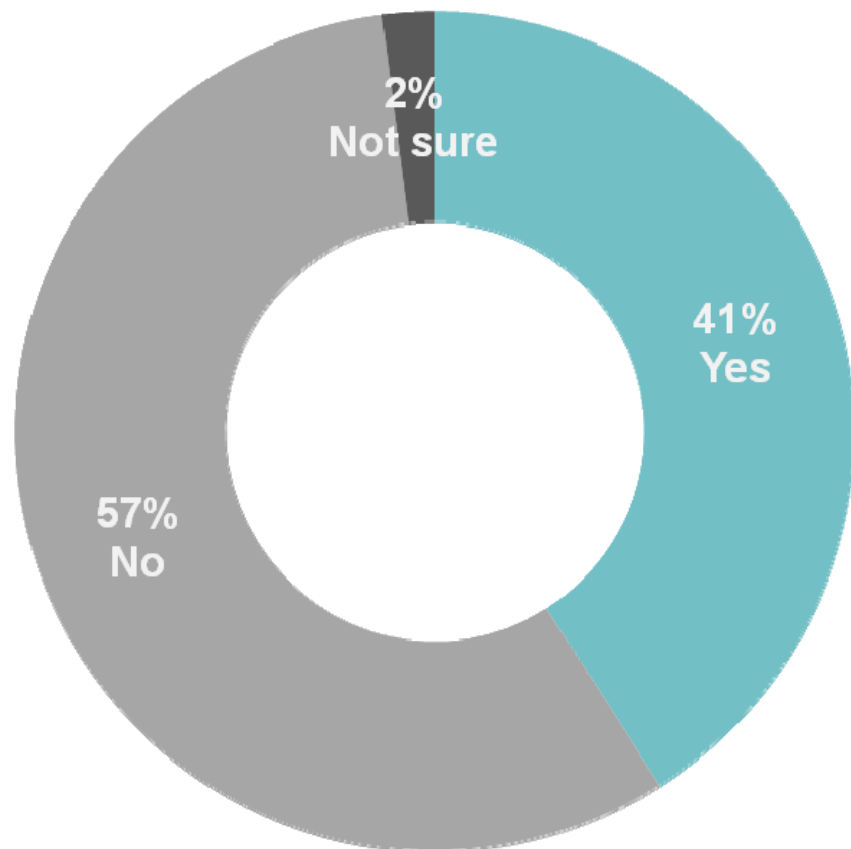


Respondent Profile

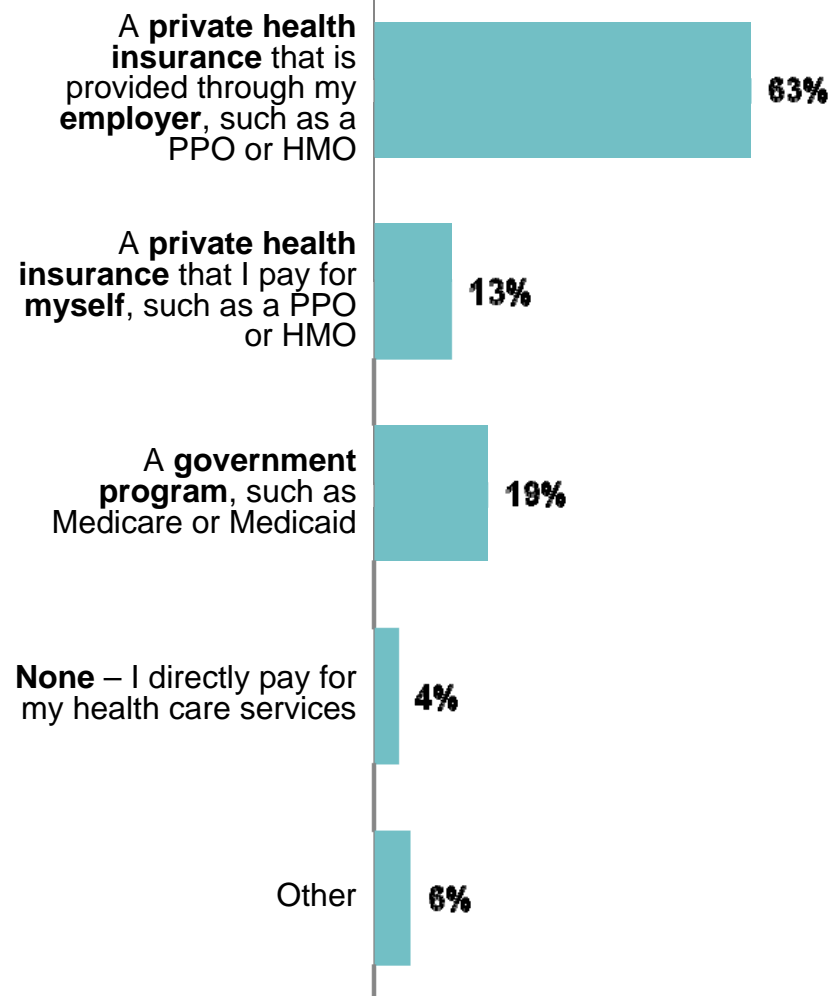


Respondent Profile

Have you been diagnosed and are being currently treated for any chronic health conditions, like heart disease, high blood pressure, diabetes, COPD, depression or others?



Which of the following best describes how you pay for health care services:



[MULTIPLE RESPONSES ACCEPTED]



Data Collection Disposition

Questionnaire Length	20 minutes
Incidence	22%
Total phone numbers used	59576
I=Complete Interviews	500
P=Partial Interviews	0
R=Refusal and break off	254
NC=Non Contact	0
O=Other	35
UH=Unknown household	42655
UO=Unknown other	4768
NE=Not Eligible	11364
e=eligibility rate (I+P+R+NC+O)/((I+P+R+NC+O)+(NE))*	6.5%
AAPOR Response Rate #3:	
$I/((I+P) + (R+NC+O) + e(UH+UO))^*$	12.9%

**Formulas and designations based on AAPOR guidelines*





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