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For health care leaders

# Survey Snapshot: Advisory Board's 2021 Cross-Industry Value Survey

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# About our research

## ABOUT OUR RESEARCH

Perspectives on the value of medical treatments and procedures vary widely depending on one's industry sector, role, and personal experiences. Stakeholders think differently about value in numerous ways: Value over what time horizon? How should we balance clinical and financial value? Value to whom? **Our research has found that perhaps the most intractable divide in perspectives on value is whether one assesses it through the lens of an individual patient or a population.**

To learn more about this tension, we surveyed 53 health care leaders across industry sectors—including providers, payers, digital health leaders, regulators, and patient advocacy leaders—to hear their perspectives. The following three slides capture our key findings and insights from the survey.

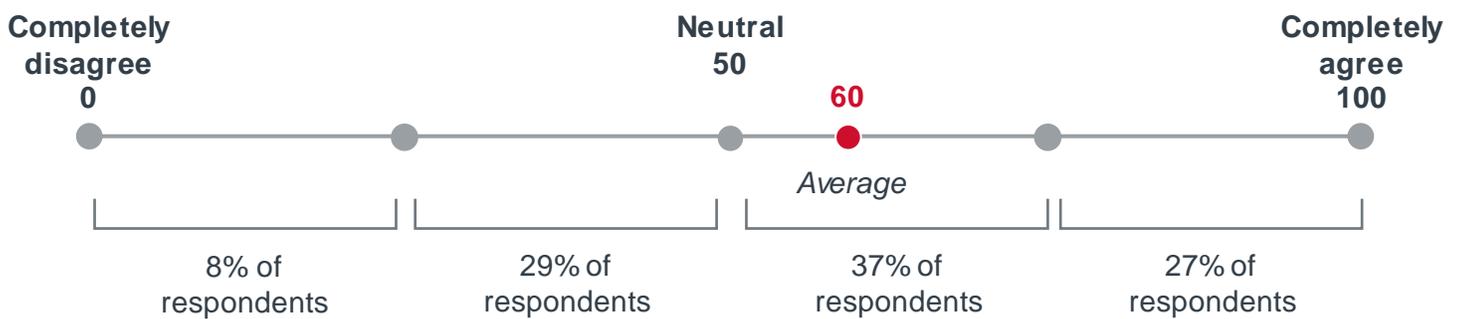
To learn more about Advisory Board's research on medical value, visit [our website](#).

# Survey findings



**We asked:** To what extent do you agree with this statement?

*Actions taken to promote **patient-centric care** often or always also promote **population health**.*



## Key insights

Respondents were more likely than not to agree that patient-centric care and population health align, with 64% expressing some level of agreement. Those who agreed often explained that patient-centric care can help limit the population's total cost of care by proactively preventing disease.

However, the degree of variation in responses—including over one-third of respondents who disagree—indicates that there may not be industry-wide consensus. Those who disagreed often mentioned that our health care system spends disproportionately on those with preexisting illness, limiting resources available for preventative measures that promote population health.

This lack of cross-industry consensus may make it more difficult to promote treatments and care models that drive value for both patients and populations.

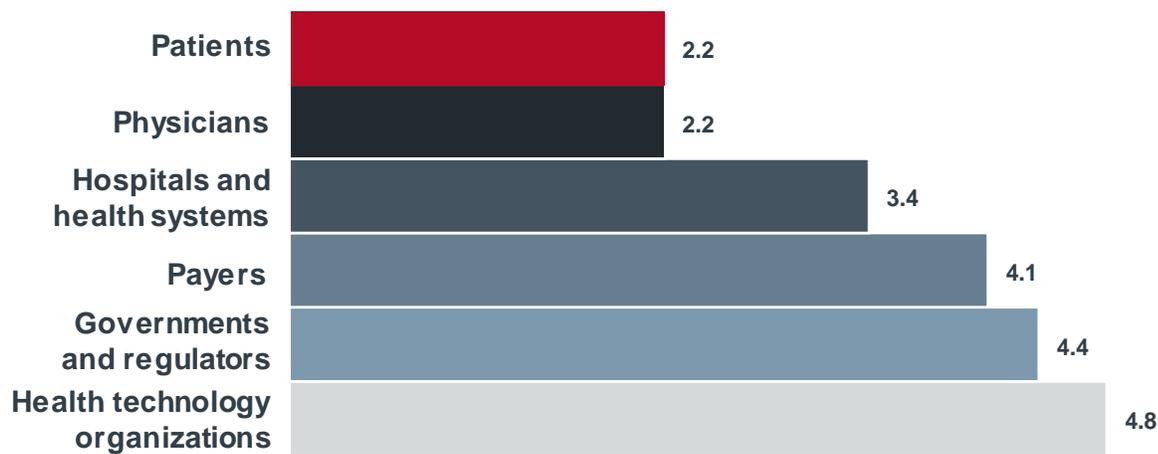
1. N= 53; respondents represented senior-level leaders across provider, payer, health tech, patient advocacy, and other healthcare organizations.

# Survey findings



**We asked:** In what order should the following stakeholders have decision-making power in determining the medical value of a treatment or procedure?

*Lower score = greater importance*



## Key insights

Respondents largely agree that patients and physicians should have the greatest influence over determining the value of treatments and procedures, and equally so. By assigning little influence to payers, governments and regulators, respondents indicated that they believe these stakeholders—which ultimately determine marketability and coverage of products and treatments—should carefully listen to patient and physician perspectives in making approval and coverage decisions.

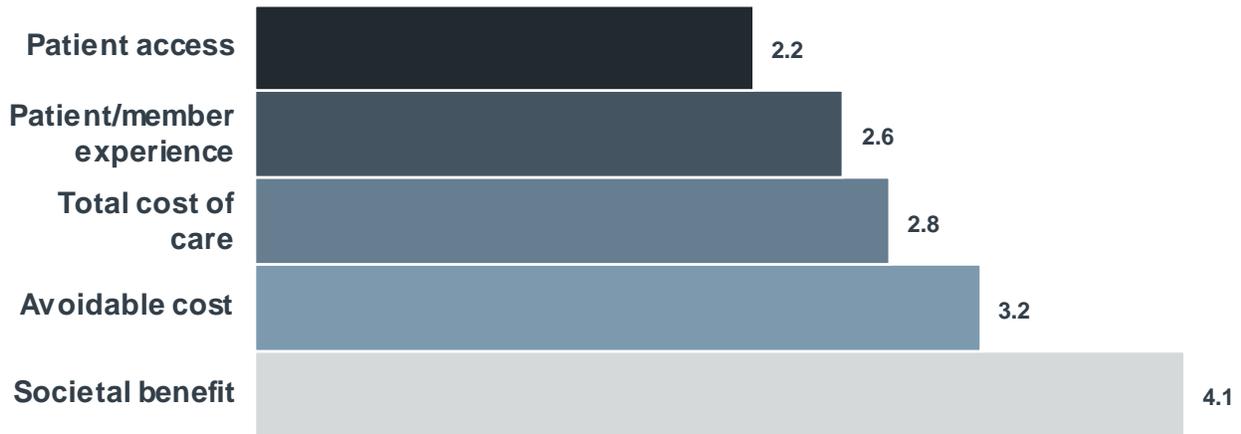
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# Survey findings



**We asked:** How do you rank the following attributes in terms of their relative importance to assessing medical value?

*Lower score = greater importance*



## Key insights

In general, patient-level drivers of value, including access and experience, outweigh population-level drivers, including total cost of care, avoidable cost, and, especially, societal benefit, among our respondents.

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