

A Survey of HEOR Leaders in Pharma on the Changing US Policy Landscape

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BACKGROUND & OBJECTIVE

- We invited 100 US-based health economics and outcomes research (HEOR) leaders in pharmaceutical companies to solicit their views on current trends and future expectations for the changing field of HEOR.

METHODS

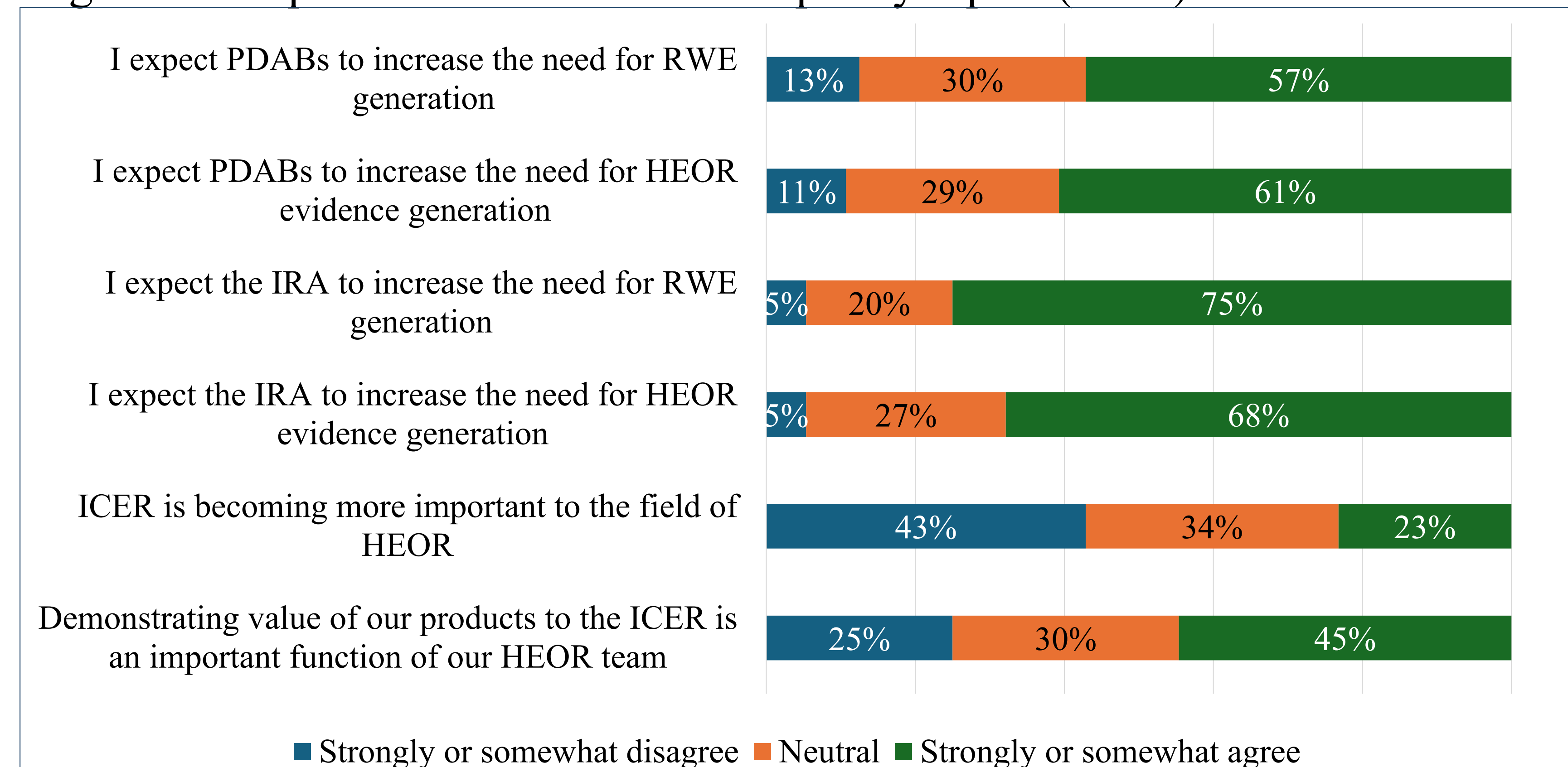
- We developed a convenience sample of 100 US-based HEOR experts at 72 pharmaceutical companies.
- Sampling prioritized large pharmaceutical companies, along with selected smaller companies, subscribed to Tufts-CEVR databases.

RESULTS

Table 1. Organizational Characteristics of Respondents' Companies (n=57, 44 companies)

Survey Question	Category	%
What is your company's size?	>30,000 employees	40
What is the size of your company's US HEOR, or equivalent, department?	>30 HEOR FTEs	44
To what office does your HEOR team report?	Market Access	30
	Marketing	5
	Medical Affairs	39
	Research and Development	12
	Other	14

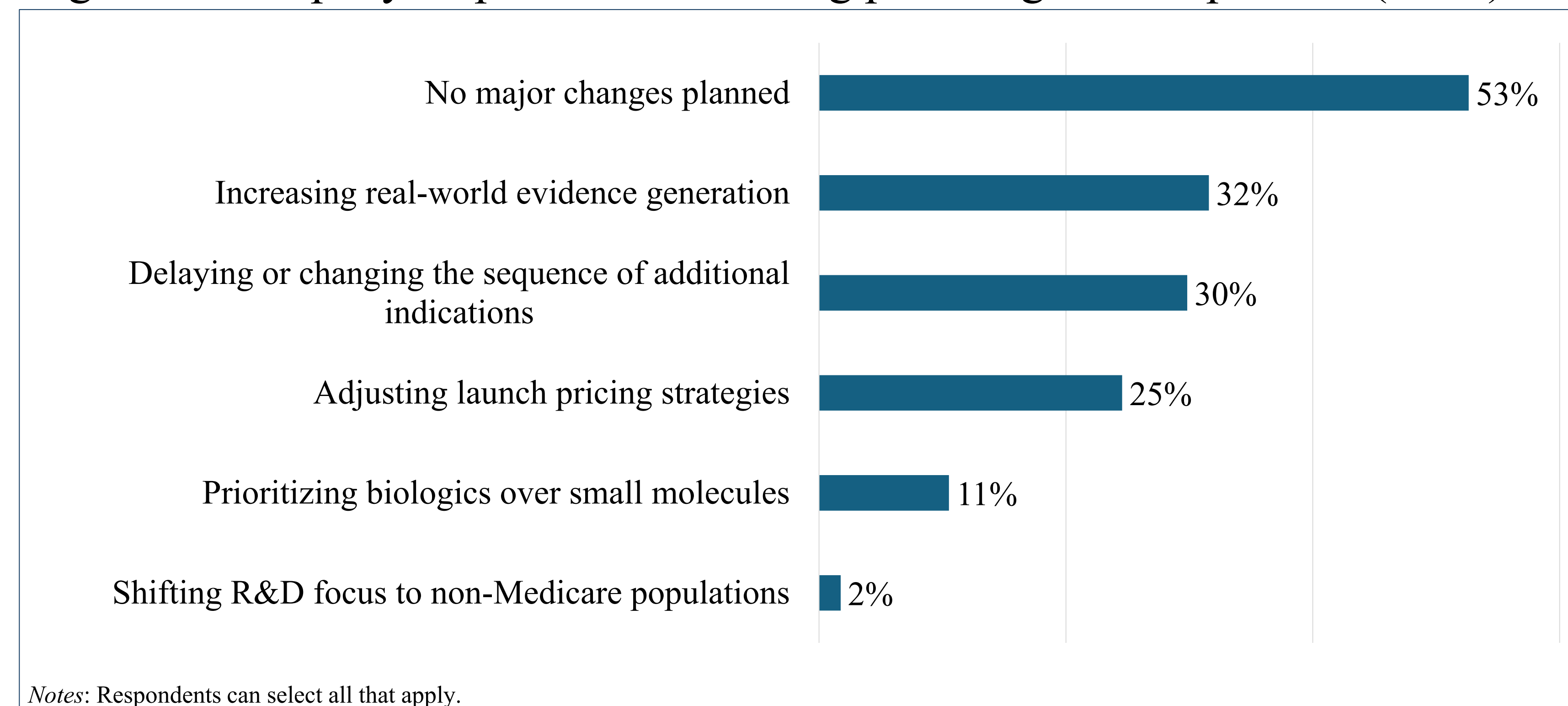
Figure 1. Respondent views on various policy topics (n=56)



Notes: One respondent was excluded because of the incompleteness of their survey.
Abbreviations: IRA = Inflation Reduction Act; HEOR = Health Economics and Outcomes Research; PDAB = Prescription Drug Affordability Board; ICER = Institute for Clinical and Economic Review; RWE = real-world evidence

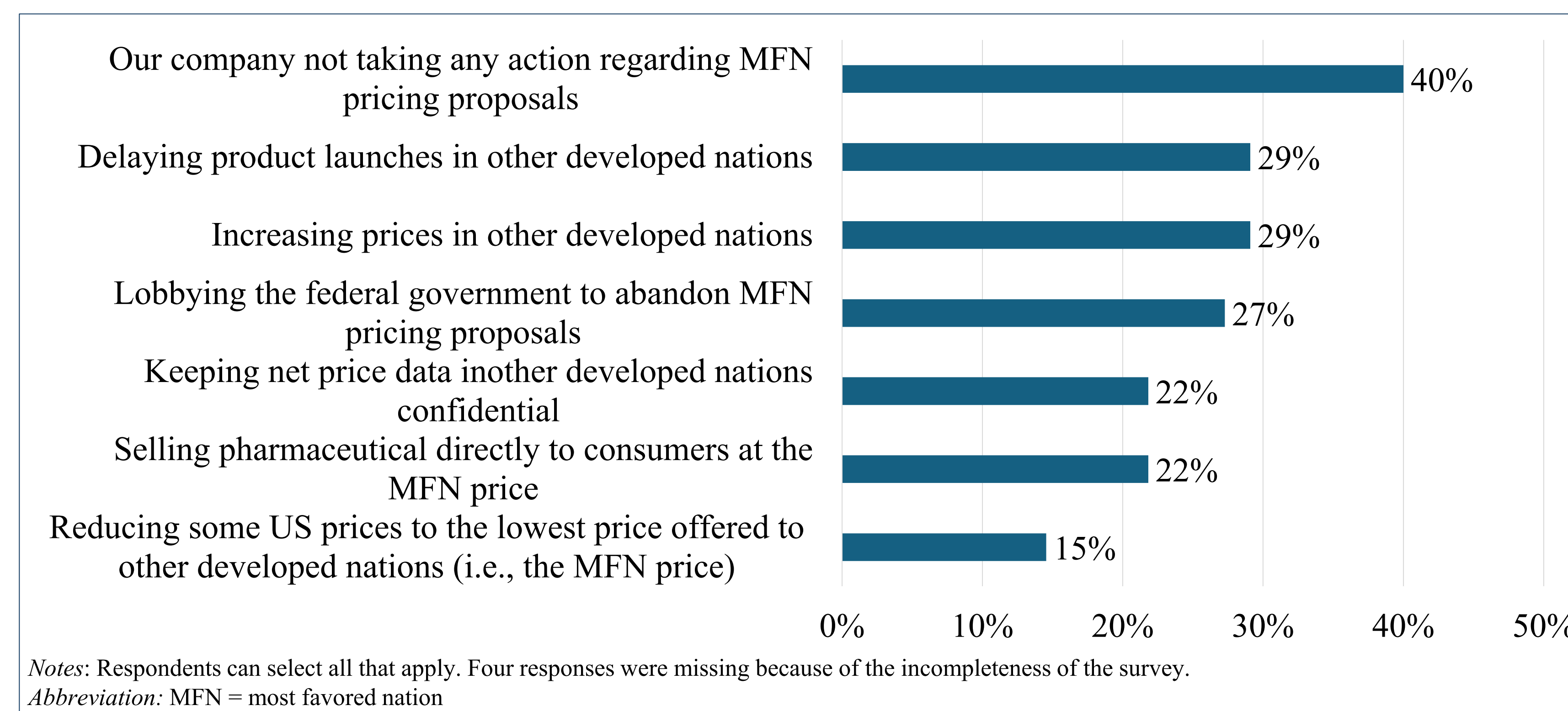
RESULTS

Figure 2. Company responses to IRA drug price negotiation policies (n=57)



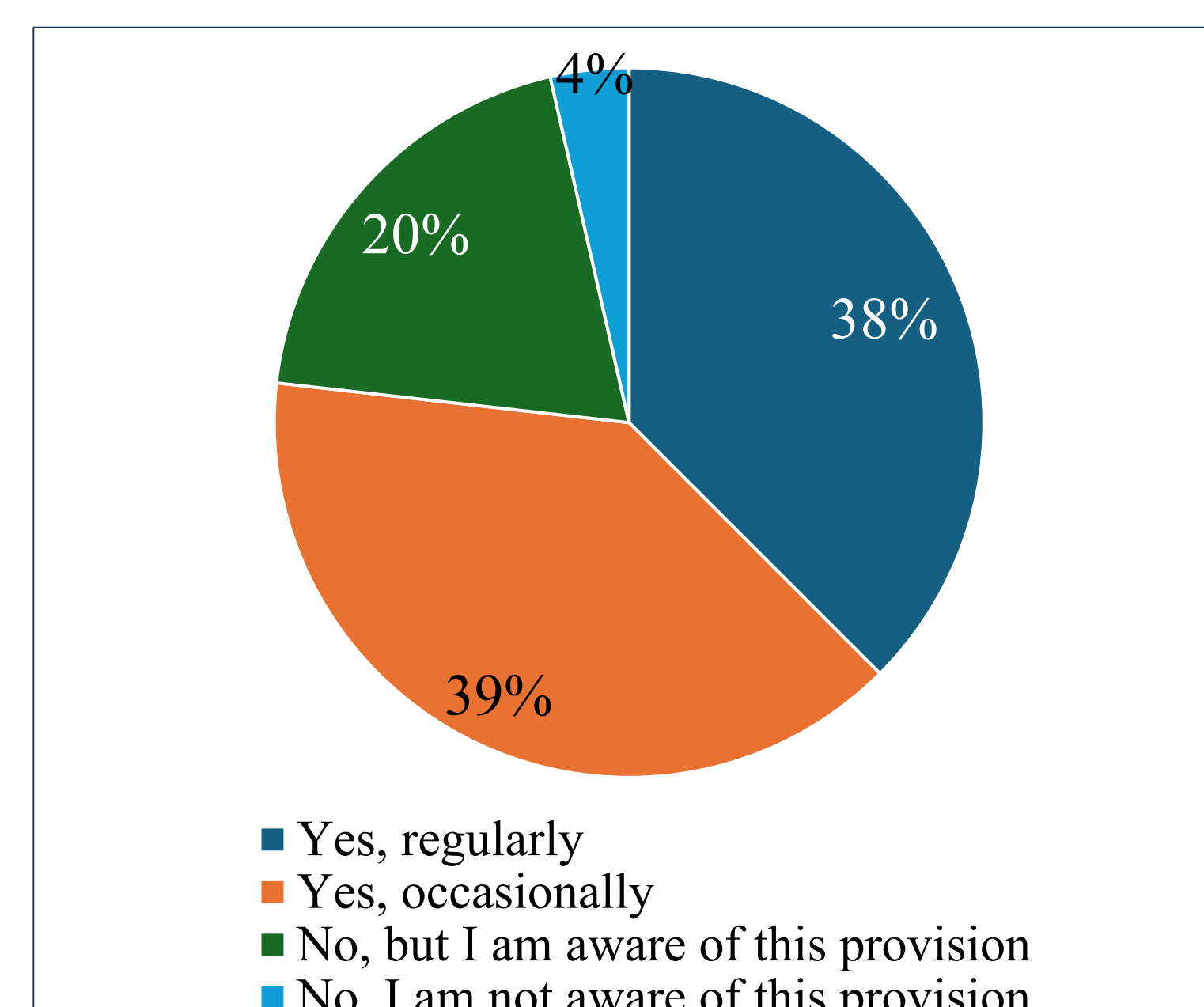
Notes: Respondents can select all that apply.

Figure 3. Company responses to federal MFN pricing policies (n=55)



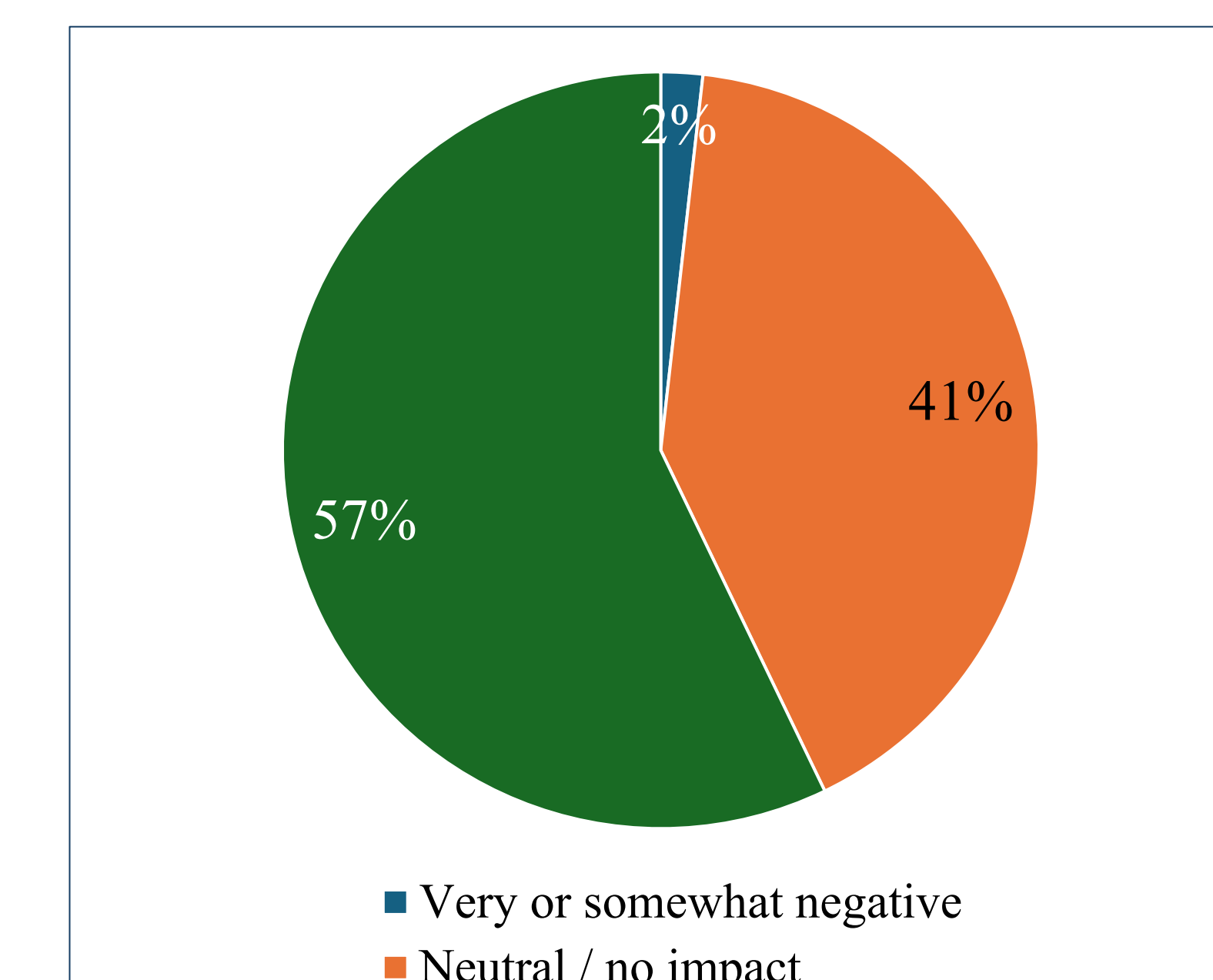
Notes: Respondents can select all that apply. Four responses were missing because of the incompleteness of the survey.
Abbreviation: MFN = most favored nation

Figure 4. Sharing of prescription drug HCEI with payers under Cures 3037 (n=56)



Notes: One respondent was excluded because of the incompleteness of their survey.
Abbreviations: HCEI = health care economic information; Cures 3037 = Section 3037 of the 21st Century Cures Act

Figure 5. Impact of Cures 3037 on how companies work with payers (n=56)



Notes: One respondent was excluded because of the incompleteness of their survey. Percentages may add up to greater than 100% due to rounding.

ADVICE FOR THE FIELD

- Most HEOR leaders expect increased RWE/HEOR demand from IRA/PDAB.
- IRA and PDAB shifts expand HEOR's strategic role.
- HEOR is needed earlier and throughout the lifecycle.
- ICER offers useful but partial guidance in a decentralized U.S. value assessment landscape.
- Cures Section 3037 offers HCEI opportunities that require proactive HEOR leadership to fully realize.

FUNDING SUPPORT

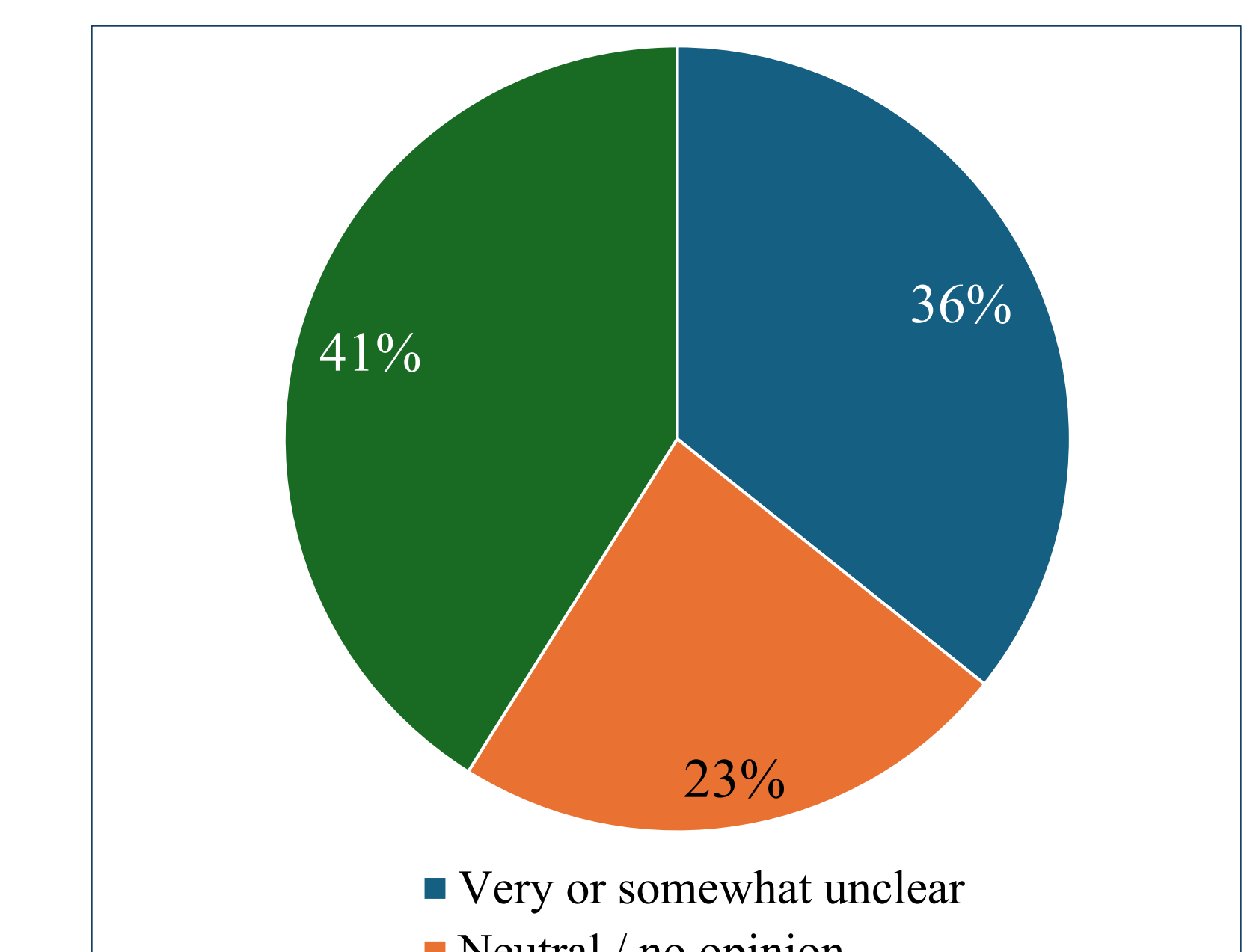
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Figure 6. Clarity of Cures 3037 guidance on permissible promotional submissions (n=56)



Notes: One respondent was excluded because of the incompleteness of their survey. Percentages may add up to greater than 100% due to rounding.