



Trends-in-Medicine

February 2006

by Lynne Peterson

Quick Pulse

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EYECARE UPDATE

To check on trends in the eyecare field, 50 optometrists from 11 states were interviewed at the Broward County Optometric Association's Gold Coast Educational Retreat in Ft. Lauderdale on January 28 and 29, 2006. They offered opinions and outlooks on silicone hydrogel contact lenses, contact lens solutions, dry eye, refractive surgery, and multifocal IOLs for cataract and refractive patients.

CONTACT LENSES

Silicone hydrogel (SiH or SH) lenses

Most doctors have a good opinion of SiH lenses, a new class of soft contact lens that allows more oxygen to reach the eye. A New England optometrist said, "They are a good concept for improved corneal health." A Florida doctor said, "They are very comfortable and increase the oxygen." Another Florida doctor said, "They are good for the right patient." An Iowa doctor said, "I highly recommend them." Other comments included:

- "They are a specialty/problem solver."
- "They are the best thing invented in 30 years."
- "They have a love/hate relationship with patients."
- "Patients like them."
- "They have great potential. I'd like to see torics and bifocals with more parameters."
- "I think SiH lenses are a healthier way to use contact lenses."
- "They are good technology but, as usual, expensive."
- "They are a giant breakthrough in technology."
- "SiH lenses are healthy but not as comfortable in *many* cases."

Doctors were asked to rank four SiH lenses. The clear winner was the Johnson & Johnson/Vistakon Acuvue Oasys. Nearly three-quarters of the doctors ranked it No. 1. Novartis/Ciba Vision's Night & Day came in a strong No. 2, Bausch & Lomb's Purevision two-week lenses came in third, and monthly Purevision lenses brought up the rear. However, half the doctors responding said they have access to B&L toric SiH lenses, and two-thirds of doctors said they plan to use them.

Other comments about J&J/Vistakon's Acuvue Oasys and other lenses included:

- "Oasys is the most comfortable of those out there so far."
- "My success percentage is higher with Oasys."
- "Vistakon solves problems right away, so I don't have to hear patients whine about their problems."

- “I prefer the monthly modality with Purevision, and I like the ‘sturdiness’ of the lens for handling reasons.”
- “Patients report good comfort with Purevision, and they come in 8.6 BC (base curve), so more patients can wear them than Oasys.”

Opinion of Silicone Hydrogel Lenses

Rating	%
Excellent	25%
Good	49%
Fair	20%
Poor	6%

Doctors reported no significant changes either up or down in SiH pricing. On average, these sources estimated that they are upgrading 44% of their patients to SiH lenses. Slightly less than half the doctors said they make money by upgrading patients. A Massachusetts optometrist said, “I charge more, but there’s more chair time.”

Sources said the economics of an upgrade for them or their office is:

➤ **Sphere-to-SiH sphere upgrade.** Doctors indicated they make more money on the lenses with this upgrade, but a few also make additional profit on the exam. A Florida doctor said, “I charge \$10 a box more.” Another doctor said, “There is more profit on the product.” A third said, “The annual exam fee is the same as the initial fitting fee.” A fourth doctor said, “I charge \$32 more for evaluation and make about \$30 more profit per box on the lenses.” A New England doctor said, “The cost to patients is \$15-\$25 more.” A Midwest doctor said, “I make about \$64 profit on a one-year supply of two-week Oasys lenses.”

➤ **Sphere-to-SiH toric upgrade.** Many doctors indicated they make more money on the exam with this upgrade, and some also make additional money on the lenses. A Pennsylvania doctor said, “The exam is more money, but the profit is the same on the lenses.” A New England doctor said, “The cost to patients is \$25-\$75 more.” A Midwest doctor said, “I make about \$128 profit on a one-year supply of one-month replacement Purevision lenses.”

Slightly more than a third of the doctors said they have seen some anti-SiH backlash. They cited some comfort issues and cost resistance, but not significant problems.

Non-SiH lenses

CooperVision just launched its first SiH lens, Biofinity, in Europe and hopes to begin marketing it in the U.S. by mid-2006. Currently, only 15% of these sources use CooperVision’s Biomedics XC, a PC hydrogel lens. Eight doctors described the Biomedics XC as a good lens, one called it fair, and the others had no comment. Silicone hydrogel lenses are causing 38% of these doctors to use fewer CooperVision lenses. However, the good news for CooperVision is that 79% of doctors said they are interested in CooperVision’s new lenses. Among the comments on CooperVision lenses were:

- *Florida #1:* “I’m always interested in new products. I just drop those that don’t meet expectations.”
- *Tennessee:* “I’m always interested in new products, and CooperVision always has good prices.”
- *New England:* “I didn’t know CooperVision had new lenses.”
- “I still use a lot of CooperVision torics, and I’m always interested in new and improved lenses.”

Preferred Silicone Hydrogel Sphere Lens

Company	Brand	Duration	% choosing	Key factors in choice
Johnson & Johnson/Vistakon	Acuvue Oasys	2 weeks	41%	Best feedback from patients, patient comfort, good handling, most complete trial set
Johnson & Johnson/Vistakon	Acuvue Advance	2 weeks	18%	Comfort, price, and availability, fewer refits, not as stiff as others
Novartis/Ciba Vision	O ₂ Optix	2 weeks	20%	Good results, not too expensive, less potential buildup on surface, great comfort, fewer patient complaints
Novartis/Ciba Vision	Night & Day	1 month	8%	Great customer services, easy access to trial lenses
Bausch & Lomb	Purevision	2 weeks and 1 month	6%	Edge design and DK, sturdiness
Other	---	---	7%	---

Preferred Silicone Hydrogel Toric Lens

Company	Brand	% choosing	Key factors in choice
Johnson & Johnson/Vistakon	Acuvue Advance	57%	Predictability, comfort, good inventory, very stable, least rotation
Bausch & Lomb	Purevision	23%	Handling, quality, availability, service, optics, stability
Novartis/Ciba Vision	O ₂ Optix	7%	Fits well, stable
Other	---	3%	---
None	---	10%	---

- *New York*: “Where I work, price is king, and CooperVision has cheap disposables...I always listen to CooperVision.”
- *Florida #2*: “I only use CooperVision toric lenses. CooperVision makes great lenses, but we don’t have trials in the office.”
- “Patients seldom complain about the CooperVision lenses they are using, and there is more choice of parameters with CooperVision lenses. My experiences with CooperVision lenses have been positive...And I have faith in CooperVision overall.”
- “Silicone hydrogels are not for everyone, and I like to fit patients in new products.”
- “All that matters is how much I pay for the box.”
- “I’m not interested in CooperVision’s new lenses because I’m happy with my current choices.”

Optometrists reported no change in the pricing of non-silicone hydrogel lenses. On average, doctors estimated that peak usage of daily lenses in the U.S. would be 38%. With respect to daily wear lenses, health, safety, and convenience were cited as the key advantages, and cost as the main disadvantage.

Comments included:

➤ **Advantages.**

- “Daily lenses are good for people who work long shifts, and they provide better comfort for the dry eye patient.”
- “They are generally much healthier and have a lower risk of infection for the eye.”
- “It is less likely patients will overwear their contacts, and they have better comfort.”
- “The health benefits are obvious. There is no need for cleaning solutions, and they are more convenient for patients.”

➤ **Disadvantages.**

- “Daily lenses encourage laziness and non-compliance. People may think that since these lenses are more ‘breathable,’ they’ll try to stretch their wearing time to *many* months. They often overwear Acuvue 2’s as it is! No one would wear the same underwear for 30 days, regardless of how clean they keep their underwear. Yet, these people receive the message that it is okay to treat their eyes this way.”
- “The inconvenience of taking them out at night is a disadvantage.”
- “One-day is great but costly.”
- “Very often compliance is poor, and the lenses are overused.”

LENS SOLUTIONS

Demand for lens care solutions is not slowing, optometrists generally agreed. They also do not believe that daily lens wear will eventually result in a near total deterioration of lens solution sales. Asked if they plan to switch to newer lens solution products geared toward silicone hydrogel lenses, 62% said yes, 10% said maybe, and 28% said no. These doctors do not expect SiH lenses to have a major impact on the lens solution business, but they did predict that SiH lenses are likely to spur modification of existing solutions and development of new lens care products and formulations – and perhaps to improve marketing programs.

Preferred Contact Lens Solution

Company	Brand	% choosing
Alcon	Opti-Free	36%
Bausch & Lomb	Renu	19%
Allergan	Complete	17%
Novartis/Ciba Vision	ClearCare	13%
Novartis/Ciba Vision	Aquify	7%
Alcon	Opti-Free Replenish (for SiH lenses)	1%
Other	---	7%

The major differentiators among the different lens solutions were cited as the preservative. A doctor said, “They use different preservatives and means to disinfect, but they all work well.”

- Asked how Alcon’s Opti-Free compares to Bausch & Lomb’s Renu, 38% of doctors rated them similar and 38% rated Opti-Free better, and 8% gave the edge to Renu. The others had no comment.
- Most optometrists were unfamiliar with Alcon’s new solution for SiHs, Opti-Free Replenish, but those who had heard about it described it as good to great. A Florida optometrist said, “It is just Opti-Free with the word Replenish under the name.”
- Only one source has heard anything about Johnson & Johnson/Vistakon entering the contact lens solution market. If J&J did introduce a contact lens solution, doctors predicted it would have the advantage of name recognition, and would dilute the marketplace, but only a few doctors thought J&J would have a *major* impact on competitors. A Florida doctor said, “J&J would take a large market share due to its marketing.” A New York optometrist said, “J&J will take a piece of the pie away from all the other brands.” Another optometrist said, “J&J is known as a contact lens manufacturer, but it is possible that people will purchase the J&J solution because they buy contact lenses from J&J.”

In general, Alcon’s Opti-Free is regarded as the winner in the solution battle for SiH lenses, with Renu the runner up, but sources generally believe the market is still up for grabs. And Wal-mart’s house brand, Equate, is capturing some market share with very low prices.

DRY EYE**Preferred OTC Dry Eye Treatments**

Company	Brand	% choosing
Allergan	Refresh	34%
Alcon	Systane	28%
Advanced Vision Research	TheraTears	21%
Alcon	Tears Naturale	3%
Novartis	GenTeal	3%
Alimera Sciences	Soothe	2%
Allergan	Liquifilm	2%
Novartis/Ciba Vision	Aquify	2%
Other	---	5%

Over the past six months, this preference has not changed, and over the next six months, doctors do not expect their preferred OTC dry eye treatment to change.

Allergan's prescription dry eye drops, Restasis (cyclosporine) was described as very good to excellent, but doctors complained it is too expensive. Use of Restasis has increased an average of 2% over the past six months, and doctors expect usage to increase 3% over the next six months. An optometrist said, "I haven't seen the results I expected...I expected to try it more, but new information about osmolarity causing inflammation might keep me from doing that." A New England doctor said, "I've had mixed results – some success." A Midwest doctor said, "Patients don't seem to like that it takes so long to work. Compliance is not that high; patients don't stick with it." Other comments included:

- "It's too expensive."
- "It didn't work for me personally, but patients have liked it."
- "It works very well with post-menopausal women."
- "I think it's great, and I will be more aggressive using it in the future."
- "It's a good concept but too expensive."
- "Restasis has its place, just not first-line."
- "Restasis does not dramatically improve all patients, even when I adhere to the recommended patient candidate profile, but I will continue to prescribe it."
- "It's too expensive, and it takes too long for results."

REFRACTIVE SURGERY

Compared to this time last year, optometrists reported that, on average, referrals for refractive surgery are flat. Over the next six to 12 months, 72% predicted referrals for LASIK or other refractive surgery procedures would remain the same, and 28% predicted referrals would increase. No source predicted referrals would decrease. Among the comments were:

Referrals up:

- *Florida*: "Pricing is still high, but there is more interest, and referrals are on the rise."

- "My referrals are up 100%...I'm becoming pro-active."
- "My referrals are up 10%, and I expect that to continue because there is more patient acceptance."
- "Every time I have a post-op come into the office, I have them talk to possible candidates."
- "I'm suggesting refractive surgery to patients more."
- "More patients are using Flex Spending Accounts."

Referrals down:

- "My referrals are down 50% because patients now go straight to the surgeon."
- "Referrals are down 5% due to the introduction of silicone hydrogel lenses."

Referrals flat:

- *New York*: "I expect my referrals to remain the same... My personal gain is not affected if I refer. My employers would get any money made for the referral."
- "It seems patients want to wait for something better, especially the presbyopic patients."
- "Most people who want refractive surgery have already had it. Prices are going up, and it is becoming a 'boutique' surgery."
- "My referrals and patient interest has remained nearly the same for the past five years."
- "I didn't refer any patients last year, and I won't refer them this year because there has been a decrease in the comanagement fee."
- "I don't plan on making any changes to how I market it to my patients."
- "I don't see any increase until the price comes down."

MULTIFOCAL IOLs – for cataract/refractive patients

A third of these optometrists reported getting comanagement fees for multifocal IOLs. Most sources said there is little patient interest in multifocal IOLs, and they are getting very few inquiries, but a few said inquiries have started to pick up. A Florida doctor said, "Patients are *not* aware. I explain and give them options."

Patients who have gotten a multifocal IOL – either Alcon's ReStor or Advanced Medical Optics' ReZoom – are generally satisfied. A doctor said, "Neither is perfect everywhere, but patients will use glasses on an as-needed basis only instead of full time." A Tennessee doctor said, "Patients seem to be somewhat satisfied, but not happy. As a clinician, I have not been pleased yet." A Pennsylvania doctor said, "ReStor patients are mostly happy, but some want to know when their vision will get clear." A Florida optometrist said, "I've had two ReStor patients; one is happy, and the other is not. I have three ReZoom patients, and they are all happy." ♦