



# Trends-in-Medicine

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## SUMMARY

◆ Optometrists are excited about Allergan's Restasis, and usage is likely to ramp quickly and strongly, limited only by cost. ◆ Allergan's Lumigan and Alcon's Travatan will continue to take market share from Pfizer/Pharmacia's Xalatan. ◆ Refractive surgery (LASIK) procedures have not picked up, and no improvement is expected until the economy improves – which doctors are dubious will occur this year. ◆ In the contact lens area, Johnson & Johnson/ Vistakon may have the most momentum over the next 6-12 months, but CooperVision is likely to be the biggest winner among these doctors. Novartis/CibaVision and Ocular Sciences should see some pickup in business, but doctors could find little good news for Bausch & Lomb.

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## Trends-in-Medicine

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## EYECARE UPDATE

To check on trends in the eyecare field, 50 optometrists from around the country were interviewed about contact lenses, glaucoma medications, dry eye therapies, and the outlook for refractive surgery.

## DRY EYE

It appears Allergan has a winner in its cupboard. Optometrists are fairly excited about Allergan's Restasis (cyclosporine), which was recently approved by the FDA to treat dry eye. The level of enthusiasm for Restasis was described as high by 32% of doctors, average by 49% and low by only 19%. Half the doctors predicted that Restasis would expand the number of patients being treated for dry eye, not simply take market share from artificial tears and other previously available products.

The patients most likely to get Restasis, at least initially, are those who have tried and failed other lubricant drops, but if the product performs well in clinical practice, some doctors plan to move it to first-line. In fact, most doctors said they do not plan to reserve the drops for patients who have failed punctal plugs. The only real hold-back in use is likely to be cost, doctors said. One source commented, "I know an optometrist with rheumatoid arthritis who was in a Restasis clinical trial, and he really got a lot of benefit. But you won't see Restasis used front-line because it is too expensive."

Doctors estimated they would use Restasis for an average of 54% of their Sjogren's patients, and 38% of other dry eye patients. They predicted the uptake would be quick. One commented, "We are already seeing lots of patients who are unsatisfied with existing over-the-counter treatments. The question will be cost and the fact that there are some side effects – it does sting a little, more in some patients than others."

- **Within three months** of launch, doctors expect to have 21% of their dry eye patients on Restasis.
- **Within six months**, they expect to have 30% of their dry eye patients on Restasis.
- **Within a year**, they expect to have 39% of their dry eye patients on Restasis.

When evaluating a dry eye therapy, the clinical trial result most likely to influence their decision as to whether or not to use a new product is corneal staining. However, subjective data – mostly patient reports of a foreign body sensation – is almost as important. An optometric lecturer said, "Symptom relief is the most important factor. Does it relieve burning, the foreign body sensation, or

patient comfort?" Another expert said, "It depends on the case. If the patient's primary complaint is subjective, there is only a little staining, and the patient is comfortable, you are happy. But if there is marked staining – or even small staining in a patient with a history of herpes and decreased sensitivity – then the patient may be asymptomatic and still need to be treated more aggressively, so you can't just go by the patient symptoms."

## GLAUCOMA

Optometrists said Pfizer/Pharmacia's Xalatan (latanoprost) has lost market share almost equally to both Allergan's Lumigan (bimatoprost) and Alcon's Travatan (travoprost), and they expect this trend to continue.

### Usage Among These Doctors

Drug	% of patients currently taking	Outlook in 6 months
Xalatan	63%	50%
Lumigan	17%	26%
Travatan	20%	24%

### Doctors switching:

- **from Xalatan to Lumigan** -- said Lumigan use is going up because of formulary changes, greater efficacy in African-Americans, lower cost and better IOP lowering.
- **from Xalatan to Travatan** -- cited exactly the same reasons: formulary changes, greater efficacy in African-Americans, lower cost and better IOP lowering.
- **from Xalatan to both Lumigan and Travatan** -- said this was due to a lack of Xalatan samples, better ease of use with Lumigan and Travatan, and more drops with Lumigan and Travatan.

### Among the comments doctors made about the outlook for their choice of a prostaglandin were:

- "With Travatan, there is no question of potency loss due to improper storage...Refrigeration is an issue with Xalatan."
- "I cannot get Xalatan samples. The company doesn't recognize optometrists."
- "Travatan is effective with a low incidence of side effects, the company has made a corporate commitment to optometry, and there are more drops in the bottle."
- "I get the best results with patients with Travatan."
- "I did a test of three bottles of each of these drugs and found that Lumigan goes further. There are more drops in the Lumigan bottle."

- "Both Allergan and Alcon support optometry more than Pharmacia."
- "Aetna has a lower co-pay on Lumigan -- \$15 for a three-month supply -- compared to \$30 for a 5 ml bottle of Xalatan."

Pfizer/Pharmacia is still hoping for FDA approval of Xalcom, a combination of Xalatan and the beta blocker timolol. Most doctors commenting described the outlook for Xalcom as good to excellent, though a few want more information about it. If Xalcom gets approved, optometrists indicated that they would switch more than 70% of their monotherapy patients to it – regardless of whether they are on Xalatan, Lumigan or Travatan. Xalcom would be used even more frequently for new glaucoma patients, with doctors estimating that an average of 83% of new patients needing both a prostaglandin and a beta blocker would be started on Xalcom rather than a two-drug regimen. Only 14% of sources said they would not use Xalcom. Among the comments on Xalcom were:

- "Xalcom would be helpful for compliance."
- "Xalcom is a good idea, but it is limiting because of the beta blocker."
- "The outlook for Xalcom is great if it lives up to the studies and is as effective as each when used together."
- "Obviously it helps compliance, but cost will be a factor."
- "I'm not sure it will even be approved. Any 2 in 1 will be appealing for the sake of compliance. It doesn't do any more than the two drops combined, but it could bring people back from Lumigan and Travatan."

**If a generic version of Allergan's Alphagan-P (brimonidine) becomes available, slightly more than half (52%) of the doctors said they would switch to the generic, but 16% of doctors said they would not use a generic at all, writing only brand Alphagan-P. Another 16% would use the generic for some patients, and 16% do not use Alphagan-P now. Among the comments on the outlook for generic brimonidine were:**

- "I would switch patients to the generic as long as efficacy and patient comfort are okay."
- "Cost is a factor for elderly patients."
- "I do not want to switch my patients, but I probably will be strong-armed by insurance companies."
- "Managed care will force a switch to the generic."
- "I will not switch patients until I know the generic's track record. I will put 'medically necessary/no substitutes' on the prescription."
- "I hope we don't have to go back to Alphagan (generic brimonidine). I don't think (insurance) plans will require use of the generic. Ophthalmology is not a generic-oriented. If there were a generic Alphagan-P, there might be more generic usage."

- “In our clinic, we’d give patients the option of a generic because a lot of patients have to buy their medications, and we have a limited budget. But if there are more complications or complaints with the generic, then they may have to switch back to the brand. And if patients are on a VA formulary, they’ll get a generic...Managed care likes generics first, and it could force generic brimonidine over Alphagan-P. That is not likely, but it is possible.”

### CONTACT LENSES

The contact lens company considered to have the most momentum in the current marketplace – the one doctors believe will do the best over the next six to 12 months – is Johnson & Johnson/Vistakon, but Novartis/CibaVision, Ocular Sciences and CooperVision (in that order) also are expected to do well. Interestingly, Bausch & Lomb did not appear on anyone’s list.

Yet, when doctors were asked about the outlook for each of the major contact lens companies in their own practice, the answers were different. Among these doctors, the company most likely to increase business over the next year is CooperVision. Novartis/CibaVision and Ocular Sciences also should see improved sales, but J&J sales are expected to slow.

#### Outlook for Contact Lens Use Over the Next 6-12 Months

Company	Contact Lenses Overall	Toric Lenses	Bifocal Lenses	Solutions
Bausch & Lomb	Down slightly	Down slightly	Up	Flat
CooperVision	Up strongly	Up strongly	Up strongly	---
Johnson & Johnson/Vistakon	Down slightly	Flat	Down slightly	---
Novartis/CibaVision	Up moderately	Slightly up	Up moderately	---
Ocular Sciences	Flat	Up strongly	Up moderately	---

Following are comments on specific companies:

**BAUSCH & LOMB:** While the company’s bifocal lenses remain strong, many doctors commented that they expect their overall use of B&L lenses to decrease.

- “The Soflens 66 toric is great.”
- “I don’t have many patients on them now. Even my toric use has declined.”
- “I like the new bifocal product.”
- “The company has good name recognition in solutions.”
- “There is a poor perception of the company.”
- “Quality has decreased.”

**COOPER VISION:** The company is on a roll, and doctors praised its products, service and pricing.

- “We will be trying CooperVision lenses instead of Vistakon and CibaVision.”
- “I like the Preference toric lenses.”
- “I’m using Cooper bifocal lenses a lot, and I love the torics.”
- “New materials are coming out.”
- “There is good trial lens availability.”
- “The prices are reasonable.”
- “Cooper has a good product mix and more innovative products.”

**J&J/VISTAKON:** Although doctors perceive it as a strong marketer, they expect their own use to decline.

- “I’m switching patients out of Acuvue lenses.”
- “J&J has the best sales reps.”
- “It’s a well-organized company with good marketing strategies.”
- “J&J does more advertising.”
  - “J&J has the most variety and a large range of powers.”
  - “Patients ask for J&J lenses.”

**NOVARTIS/CIBAVISION:** Ciba is expected to gain over the next year, but not as strongly as CooperVision.

- “There is synergy with the acquisition of Wesley Jessen.”
- “I like the new color lenses.”
- “Ciba has new materials coming out.”
- “The lenses are too thick.”

**OCULAR SCIENCES:** This company is getting increased attention and positive comments.

- “The new toric lens is great.”
- “The company has good distribution to doctors”
- “It has the best overall products.”
- “There is good product availability.”

**In contact lens solutions,** Alcon’s OptiFree appears to have the most momentum. Sales of B&L’s Renu and Allergan’s Complete are expected to be relatively flat over the next year, but OptiFree sales may pick up a little.

## REFRACTIVE SURGERY

Two-thirds of these optometrists insisted there has been no pickup in refractive surgery (LASIK referrals and no pickup in patient interest in the procedure recently. Furthermore, these doctors don't see any improvement until the economy picks up and/or the cost comes down.

What's even worse is that more than a third (35%) are not sure there will be a pickup, and 9% believe procedure numbers may decline even further. (NOTE: Apparently the financial situation of TLC The Laser Center, the largest refractive surgery chain, is worsening. TLC's purchase of Laser Vision Centers (LVCI) provided a cash infusion, but there continue to be reports that the company might close some under-performing or high-cost centers, and sources indicated that even some strong centers thought to be strong sites have seen shrinking procedure numbers.)

Among the comments on the LASIK outlook were:

- "There has been a drop in interest in LASIK among patients, and I don't see any improvement on the horizon."
- "I see it as a flat market."
- "LASIK is past."
- "I don't see any improvement for a long time."
- "I don't expect LASIK demand to pick up for at least two years. Most patients who wanted it have had it, and young people don't want to spend the money."
- "There has been more patient interest and inquiries lately because many patients know someone who has had the procedure done. However, this has not led to more surgeries. I don't see any improvement until the economy and the job market improve."
- "We've seen an increase in interest, but many are price shoppers."
- "Price is still a major consideration."

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