



# Trends-in-Medicine

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## SUMMARY

Allergan's Restasis for dry eye is expensive, but use is expected to double over the next year. ♦ Allergan's Lumigan is expected to pick up a little glaucoma market share in 2004 at the expense of Pfizer's Xalatan, with Alcon's Travatan holding steady. ♦ Optometric referrals for LASIK surgery have picked up due to custom cornea/wavefront and increased advertising, and that trend is expected to continue, but doctors are not convinced there is a significant difference in outcomes with custom LASIK. ♦ Most toric lenses today are disposables, and toric use is expected to continue to increase, with Bausch & Lomb's SofLens 66 the leader. ♦ Alcon is the company considered most likely to succeed over the next year. The overall opinion of B&L continues to deteriorate, while opinions of Novartis/CIBA Vision and CooperVision improved. Allergan, CIBA and Vistakon are viewed as having the best sales reps.

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## Trends-in-Medicine

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## EYECARE UPDATE

To check on trends in the eyecare field, 54 optometrists and ophthalmologists from around the country were interviewed at a continuing medical education conference about contact lenses, glaucoma medications, dry eye therapies, cataract surgery, and the outlook for refractive surgery.

## DRY EYE

Over-the-counter artificial tears are a first line therapy for dry eye. Most commonly, these doctors recommend Allergan's Refresh. In fact, Refresh is the top choice for slightly more than half these sources, with most of the remainder divided almost equally among Advance Vision Research's TheraTears, Novartis/CIBA Vision's GenTeal, and Alcon's Systane. A doctor said, "I only use Systane because Alcon gives me samples."

Refresh Use	Refresh users n=29	Non-users n=25
Increasing	38%	8%
Stable	48%	52%
Decreasing	14%	40%

Allergan's prescription eyedrop, Restasis (cyclosporine), is the prescription medication most often prescribed for dry eye by these doctors. However, most sources are skeptical about Restasis and concerned with the cost. Thus, doctors said Restasis is not affecting use of over-the-counter drops.

% of Dry Eye Patients on Restasis	Restasis users n=21	Non-users n=10
Currently	10%	0
In 6-12 months	17%	5%

Among the comments offered about Restasis were:

- "It's an effective treatment, but it's hard for a lot of patients to afford."
- "It's too expensive."
- The expense inhibits compliance, and there are no long term results."
- "There's not enough data yet."
- "I've had mixed results. The good outcomes are mostly in younger patients."
- "With the high expense, I need to see much more patient results before I will recommend it."

- “It’s marginally effective and definitely more expensive.”
- “I’m not convinced of the efficacy. I need more experience with it.”
- “It isn’t the wonder drug we expected. It is very expensive, takes too long to improve symptoms, and often patients are more symptomatic at first.”
- “It takes too long to work.”
- “It may be valuable in some applications.”
- “I think it may be okay for Systane non-responders.”
- “It seems to work well.”
- “It’s a good option for chronic inflammatory dry eye and dry eye associated with chronic meibomianitis.”
- “It’s great! I have dry eyes myself, and it works the best.”
- “It works, but it is only for a small market of patients. The \$100 per month cost is too much.”
- “I’ve had good results with it.”

Very few sources were familiar with either of the two other key drugs in development to treat dry eye:

➤ **INSPIRE’S diquafosol** (INS-365). A doctor commented, “Preliminary results seem promising, but I’m waiting for larger clinical trial information.”

➤ **ALCON’S 15(S)-HETE**.

## GLAUCOMA

Even though generic Alphagan (brimonidine) is available, the overwhelming majority of these doctors (77%) still prescribe Allergan’s Alphagan P (brimonidine with purite).

**Prostaglandin Use for Glaucoma**

Drug	Current % of glaucoma patients	% of glaucoma patients in 6 months	Reasons for change in usage
Allergan’s Lumigan (bimatoprost)	14%	18%	Better IOP control
Alcon’s Travatan (travoprost)	19%	20%	Good patient response
Pfizer’s Xalatan (latanoprost)	67%	62%	Need for refrigeration

## REFRACTIVE SURGERY

Two-thirds of optometrists reported a pickup in referrals for LASIK, and three-quarters expect referrals for 2004 to exceed 2003. Custom LASIK, advertising by surgeons and laser centers, and an increase in consumer confidence in the

economy are driving the increase. Among doctor comments were:

- “There is an increase in patient interest in getting rid of contact lenses and glasses.”
- “A lower ‘perceived’ price, better results, and new technology are attracting more people.”
- “More comfort with the procedure, improved technology, and better outcomes are driving the increase.”

The average price of a single-eye LASIK procedure is \$2,228, sources estimated. Discounting does not appear to be a major factor right now, and doctors reported that new LASIK centers are opening at a slower rate or not at all.

Custom LASIK (custom cornea or wavefront) is increasing patient interest in the refractive surgery, and the added cost does not appear to be deterring patients. Comments included:

- “There is some momentum now.”
- “The cost is not deterring patients.”
- “If patients are willing to pay for LASIK, they will probably pay the extra for custom cornea/wavefront. But custom cornea/wavefront is not enough to change the minds of those patients who wouldn’t go for LASIK initially.”
- “Most patients are unaware of custom cornea.”
- “Patients are more interested in LASIK with custom cornea.”

Slightly more than half the optometrists said they are seeing a difference in outcome with custom LASIK: 58% reported better outcomes, and 42% said they haven’t seen any difference.

- “There is an increase in visual satisfaction.”
- “It’s better. There’s less glare.”
- “I’ve seen a difference in outcome with custom LASIK to the point where almost every patient says vision is as good or better as with glasses or contact lenses from Day 1. They almost don’t want to do non-custom LASIK.”

Few patients are coming in inquiring about or demanding non-LASIK refractive options such as phakic IOLs, clear lens exchanges and multifocal lenses. However, a growing number of optometrists are educating patients on these options. Nearly 20% of these doctors are recommending clear lens exchanges and/or multifocal lenses, and about 10% are suggesting phakic IOLs. Comments on these options included:

- “They are a good idea for patients who are not LASIK candidates, but the idea of doing something in the eye freaks patients out.”
- “I have 100 patients on the waiting list for the Staar Surgical’s implantable contact lens (the Visian ICL).”

- “Eyeonics’ Crystalens (a posterior chamber accommodative IOL) is very interesting.”

### CATARACT SURGERY

Optometrists are interested in new IOLs for cataract patients. Cataract patients are not asking for multifocal lenses, but some doctors are informing patients about them. Optometrists also are not basing their choice of ophthalmologist for cataract referrals on the types of lens (lenses) the surgeon uses. Comments included:

- “The improvement with multifocal technology will decrease the need for a reading prescription after cataract surgery.”
- “The **AMO Array** multifocal lens looks interesting, particularly bilaterally.”
- “Patients don’t ask for multifocals because they don’t know they are available.”
- “The Array multifocal is not as great as many people say.”
- “IOLs are getting better and giving patients more options.”
- “I refer for the Array lens, and not every doctor uses it.”
- “Multifocal lenses are going to be the standard as they continue to improve.”

### CONTACT LENSES

#### Incentives

The major incentive right now is rebates for quantity purchases (a six to 12 month supply) of contact lenses. One doctor said, “Vistakon gives \$50 off a six-month supply of Acuvue.” Another said, “There’s a \$30 rebate on a year’s supply of disposables.” A third said, “I get a rebate of \$10 per box or \$40 per six-month supply.” A fourth said, “I get coupons for \$40 off when I order 4 or more boxes.”

#### Solutions

The contact lens solution most frequently recommended by these doctors is Alcon’s Opti-Free, with Allergan’s Complete a close second, and B&L’s Renu trailing far behind. A few doctors also prefer CIBA Vision’s ClearCare solution.

Doctors are divided on the question of whether or not no-rub solutions represent a meaningful advantage over older solutions. Among the comments were:

- “No-rubs are good because patient compliance is better.”
- “They promote compliance, but I’m seeing keratitis associated with them.”
- “I still recommend rubbing the lens.”

- “Patients think no-rub is better, but I still tell them to rub and rinse for better hygiene.”
- “I don’t recommend anyone to not rub lenses.”
- “No-rubs don’t work as well as when you rub.”

#### Toric Lenses

Disposable torics are used for an average of 85% of toric lens patients, sources estimated. Half these sources predicted that use of toric lenses would increase over the next year, and the others expect usage to remain flat. No sources warned that usage is likely to decrease.

The preferred toric lens was **BAUSCH & LOMB’S SofLens 66**, which was named No. 1 by 47% of doctors. **COOPERVISION’S Frequency 55** toric lens came in second and was the first choice of 29% of these doctors. Repeatedly, doctors rated CooperVision torics comparable to SofLens but better than **JOHNSON & JOHNSON/VISTAKON’S Acuvue** torics. Toric lens comments included:

- “The Acuvue toric does not have as good visual acuity, and it has too much rotation.”
- “I think CooperVision torics are better than either B&L or Acuvue torics, but they are too expensive.”
- “CooperVision torics are equal to B&L at lower cylinders, and better than B&L at  $\geq 2.25$  cylinders. Both CooperVision and B&L torics are better than Vistakon torics.”
- “CooperVision torics may be more stable, and Cooper gives me more trial lenses.”
- “J&J torics have been largely disappointing. The B&L SofLens 66 is a pretty consistent lens.”
- “CooperVision torics are comparable to B&L but better than J&J torics.”
- “I prefer B&L’s SofLens 66 toric. It’s more comfortable and has more parameters.”
- “CooperVision torics are good, but they are always on back order three weeks, whereas Acuvue and SofLens are available tomorrow.”
- “B&L’s SofLens 66 toric is the best, and (CooperVision’s) Frequency 55 toric is the most affordable. I don’t like the J&J torics.”
- “The CooperVision torics are good lenses, but the SofLens 66 is easier to fit. Acuvue torics are terrible.”

Nearly a third of doctors predicted that use of CooperVision torics would increase over the next year, with another half expecting usage to remain flat. Sources generally described the Cooper torics as worse than the B&L SofLens 66 but better than the J&J/Vistakon. One doctor said, “Cooper lenses have a consistency problem.” Another commented, “The B&L lens provides better visual acuity.” A third said, “CooperVision torics are comparable to B&L torics but more expensive.”

### BAUSCH & LOMB'S SofLens Multifocal

Three-quarters of sources have used this multifocal lens, and 26% of users rated it excellent, 26% called it good, and 41% described it as fair. Only 6% thought the SofLens Multifocal is a poor lens. Nearly half the doctors predicted that usage would increase, and the remainder expect usage to remain steady. Comments included:

- "It's a pretty good lens."
- "It's the best multifocal yet. It's excellent."
- "I love it."
- "It's the best on the market so far, but the high add doesn't always give enough near vision. It needs to be modified."
- "I'm still waiting to get a fitting set, and no sales rep has called on me despite repeated requests."

### CIBA VISION Night & Day

Patients as well as doctors have a fairly high level of interest in Night & Day extended wear lenses, and most sources agreed that they are safe – when used carefully. Comments included:

- "They're safe if they aren't worn continuously for 30 days."
- "They're safe as long as they aren't worn continuously for longer than two weeks."
- "They're safe when used with caution."
- "There's not enough long term data to justify widespread use."
- "They're safer than the current hydrogels."
- "Night & Day are safe for daily wear or for less than one week extended wear."
- "In a perfect world, they'd be safe. Unfortunately, patients will wear lenses for two or three months at a time."
- "They are as safe or safer than other soft contact lenses."
- "No-rubs improve compliance."
- "They are safe for daily wear. Leaving your socks or underwear on for a week or more at a time is absurd, so why would you want to do that to your eye?"
- "I don't think they are safe. They provide a false sense of security."
- "I'm cautiously optimistic about the safety."
- "I think these lenses promote laziness and make the patient more susceptible to contact lens-related problems because of the tendency towards abuse."

### SPECIFIC COMPANIES

Over the past year, the opinion of B&L and Ocular Sciences/American Hydron deteriorated, while the opinion of Alcon, CIBA Vision, and CooperVision improved. Opinions of Allergan and J&J/Vistakon stayed the same. The companies viewed as having the best sales reps in terms of both knowledge and service were Allergan, J&J/Vistakon and CIBA Vision, and those three virtually tied for first place. Alcon also was cited by several sources, but it still came in a poor second. Sources were not impressed with the sales reps of either B&L or CooperVision.

Sources said the ophthalmic company seeing the greatest increase in its products is Alcon, followed by J&J/Vistakon, CIBA Vision and CooperVision. Over the next three years, doctors predicted that in their practice the highest potential is for:

#### ➤ Growth in --

- Customized refractive technology
- Eyeonics' Crystalens
- Dry eye patients
- Paragon Vision Science's CRT (corneal refractive therapy)
- Cataracts
- Specialty contact lens designs
- Bifocal contact lenses

#### ➤ Contraction in –

- Refractec's conductive keratoplasty (CK) and KeraVision's Intacts. Doctors predicted these will go the way of Sunrise Technologies' LTK (laser thermal keratoplasty).
- Rigid gas permeable lenses (RGPs)
- Monocular or single vision lenses
- Colored contact lenses

*Other comments about specific companies include:*

#### ALCON

- "I appreciate the pharmaceutical samples provided for patients."

#### ALLERGAN

- "The sales rep is very attentive and supportive."
- "The website and phone list are for MDs only. Why?"

#### B&L

- "I never see a sales rep."
- "The company has a poor history with optometric relations."

**CIBA VISION**

- “CIBA has the worst customer service.”
- “There is a wide selection of products, and the company is very flexible in providing trial lenses for our inventory.”
- “The sales rep is very unfriendly and doesn’t offer any support to commercial doctors in certain practices.”

**COOPERVISION**

- “Great products.”

**JOHNSON & JOHNSON/VISTAKON**

- “Vistakon has terrible customer service.”
- “Vistakon used to have excellent customer service, but it has gone down hill.”
- “The Vistakon rep is on the ball!”
- “The company is not supportive in providing provider trial lenses.”
- “Vistakon has the best sales reps even though I hate the company.”

**OCULAR SCIENCES/AMERICAN HYDRON**

- “The company has a good toric/spherical contact lens product.”
- “I’d prefer never to see the company again.”

**MISCELLANEOUS****Rheophoresis**

This blood filtering treatment for age-related macular degeneration (AMD) has not impressed sources. Most of these doctors were unaware of the technology. A few predicted it will do poorly, and a few thought it might do “so/so,” but only two predicted it will do well. One doctor called the outlook for rheophoresis “grim,” and another described it as “cloudy.” A third optometrist said, “It is promising, but it is very expensive and impractical in that it must be done repeatedly. Nanotechnology, gene therapy, and stem cell research are more practical.” A fourth doctor said, “It’s a great idea, but it is difficult to sell the idea to patients.”

**ALLERGAN’S Zymar****(gatifloxacin ophthalmic solution 0.3%)**

Nearly every source predicted that use of this fluoroquinolone antibiotic would increase over the next 12 months. It is being used for bacterial conjunctivitis, corneal ulcers and abrasions, and keratitis. Comments included:

- “Off label use for ulcers is increasing.”
- “I’m using it for keratitis, and it is working well.”

- “It’s excellent for post-LASIK patients and contact lens-related infections.”
- “It’s a good product, but it has a bad preservative.”
- “It’s the latest and greatest – until the next generation agent or resistance occurs.”
- “Alcon’s Ciloxan (ciprofloxacin hydrochloride ophthalmic ointment, another fluoroquinolone) is better for what I do most, but I use Zymar for corneal ulcers.”
- “It’s excellent, but it can be toxic.”
- “It’s useless.”

**ALLERGAN’S Acular LS (ketorolac tromethamine)**

Sources generally expect use of this topical NSAID to remain flat over the next 12 months. Most sources are using it for allergies and/or eye pain. Comments included:

- “I don’t like Acular LS. We recently switched to Novartis’s Voltaren (diclofenac sodium) instead.”
- “It’s unnecessary. There are better options.”
- “I don’t like it. It stings too much, but I use it occasionally for eye pain.”
- “It’s good for inflammation with pain.”

