



Trends-in-Medicine

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SUMMARY

Refractive surgery referrals by optometrists are down slightly and likely to remain flat through 2008, but multifocal IOL use, primarily for cataract patients, is increasing. ♦ Contact lens sales are slightly down, a trend expected to continue through 2008. ♦ Silicone hydrogel lenses now account for more than 50% of fittings, and that is growing. Johnson & Johnson/Vistakon's Acuvue Oasys is the most popular silicone hydrogel, but CooperVision's Biofinity is catching on, though it doesn't have a full range of powers yet. ♦ Alcon's Opti-Free Express is the contact lens solution most frequently recommended by these optometrists. ♦ Inspire's antibiotic, AzaSite, hasn't caught on yet among optometrists, but its less frequent dosing is starting to attract attention. ♦ High cost and poor patient compliance are the key reasons that use of Allergan's dry eye medication, Restasis, isn't growing. ♦ Use of Combigan, Allergan's new combination glaucoma medication, is growing, and in a year 15% of glaucoma patients could be taking it. ♦ Alcon's Patanol is the No. 1 ocular allergy medication, but most doctors would switch to a generic if it became available because of cost.

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EYE CARE UPDATE

To check on trends in the eye care field, 61 optometrists from 9 states and Canada were interviewed at the Broward County Optometric Association's Gold Coast Educational Retreat in Ft. Lauderdale on January 19 and 20, 2008. They offered their perspective on the economy and estimates of the outlook for medications to treat glaucoma, dry eye, and ocular allergies as well as contact lenses, contact lens solutions, multifocal intraocular lenses (IOLs), cosmetic procedures, and refractive surgery.

Economy

The housing crisis, the credit crunch, and talk of a recession are not slowing the contact lens market overall, but those factors are chilling the refractive surgery market.

Economic Outlook

Eye care area	Slowing	No slowing
Contact lenses	61%	39%
Refractive surgery	74%	26%

Contact lenses

Over the last six months, contact lens fittings are down an average of 3.2% overall for these doctors, but this is driven mostly by the 29% of doctors who reported a decline in fittings. Yet, only 12% said fittings are up, so it is clear there has been some softening of demand.

The outlook is for contact lens fittings over the next 6-12 months to decline very slightly – by an average of 0.7%:

- **Down.** 24% predicted a decline going forward. Several reasons were cited as almost equally responsible for this: the economy, price, telephone and online ordering, insurance/managed care, less patient disposable income. A Florida doctor commented, "Patients are making a discretionary decision."
- **Up.** 15% said fittings would go up. Reasons cited included: increased advertising, being "more assertive" with patients, patient "growing need" for contacts, word-of-mouth, and new products, particularly Johnson & Johnson/Vistakon's Acuvue Oasys and Acuvue Advance for Astigmatism and CooperVision's multifocal contact lenses.
- **Flat.** 61% said fittings would be flat.

Silicone hydrogel (SiH) lens fittings have increased an average of 11.4% over the past six months, and SiH lenses now account for more than half of all fittings for these doctors. They estimated that, on average, 55.4% of their patients are now in

SiH lenses. Over the next six months, they predicted that their volume of SiH lens fittings would increase an average of 9.8%.

Silicone Hydrogel Lens Fittings

Time period	Up	Down	Flat
Change now vs. 6 months ago	58%	8%	34%
Expected change over next 6 months	62%	8%	30%

The most popular SiH lenses are Johnson & Johnson/Vistakon's Acuvue Oasys by a long shot:

- **Comfort** – Oasys is considered the most comfortable lens by the vast majority of doctors, followed by J&J/Vistakon's Acuvue Advance, though there were a few mentions of Novartis/Ciba Vision's O₂ Optix, CooperVision's Biofinity, Novartis/Ciba Vision Focus Night & Day lenses, and Bausch & Lomb's PureVision.
- **Availability** – Oasys also has the best availability, again followed by Advance, with a few votes for Ciba's Focus Night & Day and Ciba's O₂ Optix, and B&L's PureVision. However, no one cited good availability for CooperVision's Biofinity.
- **Price** – Ciba's O₂ Optix and J&J/Vistakon's Acuvue tied on best pricing, followed by B&L's PureVision.

Silicone Hydrogel Lenses Prescribed Most Often

Silicone hydrogel lens	January 2008	January 2007
J&J/Vistakon's Acuvue Oasys	43%	41%
J&J/Vistakon's Acuvue Advance	15%	16%
Ciba Vision's Focus Night & Day	17%	16%
Ciba Vision's O ₂ Optix	9%	24%
B&L's PureVision	11%	2%
CooperVision's Biofinity	4%	0
Other	1%	1%

A quarter of these doctors have already tried CooperVision's Biofinity SiH lens. Asked for their opinion of the lens, doctors often described it as good, great, or excellent, but they said there are availability issues – especially a shortage of parameters and the lack of a toric lens.

- “Excellent but limited parameters and no toric yet.”
- “Very comfortable.”
- “Does not live up to its hype.”
- “Great comfort and visual acuity.”
- “It's good so far, but there are limited parameters, and I prefer two-week lenses to monthly lenses.”
- “Good, comfortable lens.”
- “Biofinity is priced very good. If it were approved for 30-day wear, no one would fit Night & Day anymore.”

Among doctors who haven't used Biofinity yet, comments included:

- “I don't have a trial set yet.”
- “I don't have enough information yet.”
- “I just heard of it this weekend.”
- “I never really knew about it.”

Over the next 6-12 months another 22% of these doctors plan to try Biofinity or increase their use of it. They predicted this will affect mostly J&J/Vistakon's Acuvue Oasys, B&L's PureVision, and Ciba's Night & Day.

CooperVision's Biomedics EP (early presbyopia) lens also appears to be doing very well. It is popular with patients in their 40s because it is “easy and fast to fit.”

Contact lens solutions

In 2006, Bausch & Lomb's ReNu with MoistureLoc contact lens solution was recalled worldwide when it was linked to an outbreak of *Fusarium* keratitis, and then in 2007 Advanced Medical Optics (AMO) was forced to recall its Complete MoisturePlus Multiple Purpose contact lens solution after the Centers for Disease Control and Prevention (CDC) linked it to an increase in *Acanthamoeba* keratitis. However, doctors almost unanimously agreed that patient concern about contact lens solution safety has quieted down. Only 4% said patient concern remains high.

The two recalls have definitely impacted the contact lens solution that these optometrists recommend. Alcon's Opti-Free Express is now far and away their most frequently recommended brand of contact lens solution. Two cited AMO's Complete as the No. 1 contact lens solution, only a small handful prefer Novartis/Ciba Vision's ClearCare, and just one doctor's top solution is B&L's ReNu.

Of these doctors, only 21% have recently changed the primary contact lens solution they recommend. Among the changes were:

- A shift **to ClearCare** from Opti-Free Express because of:
 - “Better compliance and less allergic reactions.”
 - “Better patient education, better comfort, and better disinfection.”
 - “I feel ClearCare is better.”
- A shift **to AMO's Complete** from Opti-Free Express due to manufacturer detailing and availability.
- A shift **to Opti-Free Express** because of: availability of samples and sales rep detailing.

Refractive surgery

Compared to January 2007, referrals in January 2008 by these doctors for LASIK/refractive procedures are down an average of 2.5%. Referrals were unchanged for 60%, down for 20%,

and up for 20%. Among the reasons for a change in referral volume were:

➤ **An increase:**

- “There is increased patient interest.”
- “We’ve been doing more advertising in our practice.”
- “Patients are more informed and have been previously advised.”
- “There is more doctor understanding (of the procedure), and patient education has improved.”
- “I believe in the procedure now.”
- “I’m getting more comfortable making the referral.”
- “I’m trying more to refer.”

➤ **A decrease:**

- Several doctors cited the economy, with comments like: “Referrals are down due to the economy.”
- “Patients are not able to afford LASIK.”
- “There are more options (for patients).”
- “I’m in a new practice location with a difficult patient base.”
- “The (LASIK) market is saturated.”
- “Patients have less disposable income.”
- “There are not as many patient inquiries.”
- “Patients are probably going directly (to LASIK surgeons/centers).”

A third of these doctors said they are seeing increased competition for patients from new chains in the refractive surgery arena vs. last year. Yet, even in that environment, LASIK pricing was reported to be flat.

Over the rest of 2008, 25% of these doctors predicted that LASIK referrals would increase, while 13% said they would decline, and 62% said they would remain stable. Almost a quarter also are seeing an increase in patients being referred for refractive procedures other than LASIK, in particular multifocal IOLs, but also some for PRK, LASEK, Epi-LASIK, Eyeonics’ Crystalens, and Refractec’s Conductive Keratoplasty (CK).

Slightly more than half the doctors (56%) said patient interest in multifocal IOLs is increasing, and doctors are recommending multifocal IOLs to more patients: 61% recommend multifocal IOLs to their cataract patients, and 36% recommend refractive lens exchange to patients. Few of these optometrists have a preferred multifocal IOL, generally leaving that decision to the cataract surgeon. Asked if Alcon’s ReStor lens is starting to pick up, 85% said no.

Over the next 6-12 months, 73% of these doctors predicted their patients’ use of multifocal IOLs for cataract surgery would increase, and 49% said their use for refractive lens exchange would increase.

Asked for their opinion of multifocal IOLs, doctors generally liked them, calling them good or even fantastic – but for selected patients. And they complained about the cost. Their comments included:

- “They are not always successful, and they are not for everyone.”
- “I don’t like them.”
- “It’s a good option in selected patients.”
- “They’re good but expensive for the patient.”
- “They are fantastic but not for everyone.”
- “They’re great for patients with little astigmatism and no night driving.”
- “The results are getting better.”
- “They seem good in the right surgeon’s hands.”
- “Most patients I’ve seen are less happy than anticipated for the extra cost.”
- “They are a compromise to glasses.”
- “I’m not sure. I’m concerned about possible problems.”
- “I’m still waiting to see one that works.”
- “It’s a great option for cataract patients.”
- “Accommodating IOLs (Crystalens) are more patient-friendly.”
- “There are too many drawbacks, and they are too expensive.”
- “I have mixed feelings. There are advantages and disadvantages. It is patient-dependent.”

Antibiotics

The newest macrolide antibiotic is Inspire’s AzaSite (azithromycin) – licensed from InSight Vision. AzaSite was approved by the FDA in April 2007 and launched in August 2007. It is dosed less frequently than other topical antibiotics: 1 drop BID for the first two days and then 1 drop QD for the next five days, for a total of 9 drops per treated eye. AzaSite is FDA-approved for the treatment of bacterial conjunctivitis caused by CDC coryneform group G, *Staphylococcus aureus*, *Streptococcus mitis* group, *Streptococcus pneumoniae*, and *Haemophilus influenzae*. Only a few of the optometrists questioned have prescribed AzaSite yet, but its dosing is causing doctors to start looking at it. Comments included:

- “I’m interested, but I need to know more.”
- “I haven’t tried it yet. There is limited availability.”
- “I haven’t tried it yet, but it is compelling due to the low dosing.”
- “It’s a very good antibiotic. Less drop instillation creates more compliance and quicker resolution.”
- “It is good for blepharitis. There is good compliance with BID and QD dosing.”
- “It’s amazing. The dose frequency is the same, but patient compliance is improved.”

- “Dosing is the biggest benefit, especially for compliance.”
- “I will never use it. There is no advantage. Tobramycin generic does the same thing.”

Dry eye

Dry eye syndrome is a common ocular complaint, perhaps affecting as many as 21 million Americans. The eye depends on tears to provide constant moisture and lubrication; dry eye is the result of an imbalance in the eye's tear film.

Doctors estimated that an average of 14% of their dry eye patients are on Allergan's Restasis (cyclosporine A), a level that is holding fairly steady. Direct-to-consumer advertising of Restasis is increasing awareness of dry eye and of Restasis, but price and poor patient compliance limit Restasis's utility. Doctors said patients often ask about Restasis, but the price turns them off.

Restasis Use

6 months ago	Now	Expected in 6-12 months
15%	14%	16%

Optometrist comments about Restasis included:

- “It takes a long time to give relief, and patients want a quick fix.”
- “It's another expensive drug, and there is poor compliance from patients.”
- “It works well for most patients, but a lot drop out due to the burning and the cost.”
- “I love it. It is a breakthrough and the current gold standard.”
- “Restasis doesn't work as well as advertised.”
- “I don't really see a benefit, and it is very expensive.”
- “It works, but it's pricey.”
- “I like the ability to encourage our bodies to produce their own tears. The burning symptoms need to be worked out.”
- “Patients generally don't want to wait weeks to months before it becomes effective. It is expensive, and patients are not committed to taking it compliantly.”
- “It is difficult to keep patients on Restasis if it is started as the sole therapy, but after a four-week jump-start with a steroid, most patients want to keep their tear quality improvement, so they are more likely to stay on it.”
- “It is a great therapy, but it is expensive for some populations even with insurance coverage.”
- “I'm suspicious that it is all hype.”
- “It works well in some patients, but it does not solve the whole dry eye problem.”

- “It is excellent, but there is horrible compliance from patients.”
- “The cost is ridiculous. Pulse steroids, artificial tears, lid hygiene, and omega 3/6 (Fortifeye Vitamins' Fortifeye Dry Eye Therapy) work better than Restasis!”
- “It's a placebo-type drug.”

Only one doctor was aware of any promising new dry eye medications on the horizon, and that doctor mentioned secretagogues.

Glaucoma

Medications Prescribed for Glaucoma Patients

Drug	% share in 2007	% expected share in 2008
Allergan's Lumigan (bimatoprost)	15%	16%
Pfizer's Xalatan (latanoprost)	39%	35%
Alcon's Travatan (travoprost)	25%	24%
Beta blocker only	11%	9%
Merck's Cosopt (dorzolamide + timolol)	5%	5%
Allergan's Combigan	1%	6%
Other	4%	5%

The newest glaucoma medication is Allergan's Combigan, a combination of Allergan's Alphagan (brimonidine) plus timolol, a beta blocker. Slightly more than a third of these doctors (35%) have already started prescribing Combigan, and over the next six months 59% of those not using it plan to start. In a year, doctors estimated that an average of 14.6% of their glaucoma patients will be taking Combigan.

Users generally described Combigan as fair to good. Comments included:

- “It is a small niche, but it has a place.”
- “It hasn't been used long enough to see the effects.”
- “At first I was skeptical, but I was pleasantly surprised at how well it works.”
- “So far, I've seen great results...It is faster (acting) for patients.”
- “Combigan is better for (patient) compliance.”

Doctors with no plans to start using Combigan cited these reasons:

- “I like the other agents already available.”
- “Perhaps I'd try it when I find a new patient on Alphagan.”
- “If a patient needs two (different) drops, then I refer the patient out.”
- “It's too expensive.”

Most doctors (56%) said Combigan would replace dual prescriptions for Alphagan and timolol, 33% would use it in place of Merck's Cosopt (dorzolamide + timolol), and 11% would use it in lieu of dual prescriptions for Alcon's Travatan (travoprost) plus timolol. A common comment was: "It will only be used in patients already on the same combination."

Allergan also is testing memantine, an NMDA-receptor antagonist, as a neuroprotective in glaucoma. Memantine is already approved for the treatment of Alzheimer's disease under the brand name Namenda and is marketed for that by Forest Laboratories. In glaucoma, memantine is believed to work by directly protecting the optic nerve from toxic calcium levels that are believed to lead to glaucoma progression without impacting other aspects of cell function.

The first Phase III trial of memantine in glaucoma failed to meet the primary endpoint, a measure of visual function (not further identified by Allergan), though it did meet a secondary visual function endpoint vs. placebo. The results of the second Phase III trial are expected very soon. Most optometrists questioned have not heard anything about memantine in glaucoma, but the few who had heard about it remained skeptical. If memantine is approved as a neuroprotective for glaucoma, doctors estimated that they would prescribe it for an average of 30% of their glaucoma patients when it is available.

Nationally, Alcon's Travatan appears to have lost market share over the past year. Doctors offered several possible reasons for this:

- Side effects, particularly red eyes and burning.
- Fewer sales reps calling on doctors.
- Increased competition from other medications.
- Less efficacy than other prostaglandins.
- Formularies.

Cosmetic procedures

Cosmetic surgeons have found an off-label, topical use for Allergan's Lumigan – lengthening eyelashes. Eyelash growth is a known side effect of this glaucoma medication, and cosmetic surgeons are writing prescriptions for Lumigan. They instruct patients to dip an eyeliner brush into the Lumigan and then paint it on the eyelid at the base of the lashes. Reportedly, eyelashes begin to grow in as quickly as two days. The treatment is repeated daily, with a 2.5 ml vial lasting about a month. However, some patients reportedly only need to apply the Lumigan every other day or even once a week, depending on how fast their lashes grow.

Only two optometrists have prescribed Lumigan for this purpose, but another three said patients have asked about it. One commented, "It is not that I okay it, but patients have told me they do it." Another said, "A patient requested this, and I refused." A third doctor said, "Many people have inquired about this."

Ocular allergies

Alcon's Patanol (olopatadine HCL 0.1% and 0.2%) is a very commonly used agent for ocular allergies. On average, 46% of these doctors' ocular allergy patients are on it. One doctor said, "It works and is easily available." Another commented, "The price is good."

However, if a generic Patanol becomes available, most doctors would switch in order to save money for their patients. Comments included:

- "I'd switch for uninsured patients to minimize expense."
- "I'd change to save patients money."
- "I'd switch for the cheaper price."
- "I'd switch to the generic for patients where price is a factor and stay with the brand name for patients with insurance."
- "I would switch to the generic if it worked as well and was less expensive for my patients."
- "I would switch to the generic. It's a better cost for a lot of patients, especially uninsured patients."
- "Probably patients would switch due to cost."

A few doctors said they would stay with brand Patanol. One explained, "It is a well-known name and effective." Another said, "I would prescribe (brand) Patanol, but not require it for my patients." A third said, "In general, I like to stay with brand names."

Despite all the ocular allergy medications now available, most doctors still believe there is a need for a new medication for two key reasons: price and improved efficacy. Comments included:

- "There is always room for improvement."
- "Patanol is great, but it is expensive. That's the only complaint."
- "We can always benefit from a more efficacious medication."
- "We need something with less stinging, less frequent dosing, and a better price."

