



# Trends-in-Medicine

March 2006

by Lynne Peterson

## Quick Pulse

*Trends-in-Medicine has no financial connections with any pharmaceutical or medical device company. The information and opinions expressed have been compiled or arrived at from sources believed to be reliable and in good faith, but no liability is assumed for information contained in this newsletter. Copyright © 2006. This document may not be reproduced without written permission of the publisher.*

### **Trends-in-Medicine**

Stephen Snyder, Publisher  
2731 N.E. Pinecrest Lakes Blvd.  
Jensen Beach, FL 34957  
772-334-7409 Fax 772-334-0856  
[www.trends-in-medicine.com](http://www.trends-in-medicine.com)

### EYECARE UPDATE #2

To check on trends in the eyecare field, 60 optometrists from seven East Coast and Midwest states were interviewed at the Dade County Optometric Association's Miami Nice Education Symposium in Miami FL on March 4 and 5, 2006. They offered opinions and outlooks on silicone hydrogel contact lenses, contact lens solutions, dry eye, refractive surgery, multifocal IOLs for cataract and refractive patients, and more.

### CONTACT LENSES

Daily disposable lenses are used by an average of 21% of these doctors' patients. That is not expected to change over the next year – or even over the next three years.

Silicone hydrogel (SiH) lenses are quickly gaining popularity, with Johnson & Johnson/Vistakon's Acuvue Oasys far and away the No. 1 choice of these doctors. However, use of Oasys appears to be coming primarily from regular Acuvue users. Comments on Oasys included:

- “It works well with most patients, and there are lots of samples available for trial fitting.”
- “There is excellent comfort and vision, and my success rate is >90%. Patients get a ‘wow’ factor.”
- “They are easy to get and use.”
- “They’re super comfortable and the best for dryness so far.”

Prices for silicone hydrogel lenses as well as older material contact lenses are relatively stable. Sources reported slight price increases for SiH lenses and slight decreases for lenses out of other materials. They did not specify the amount of the change.

Silicone hydrogel lenses are not difficult to fit or uncomfortable to wear (rigid), most doctors (81%) agreed, but some noted that the lenses can *feel* different than regular contact lenses.

- “Patients seem okay with the comfort; it’s just a different sensation from soft contact lenses.”
- “Some patients have comfort issues at first.”
- “Some are uncomfortable to wear, but they are not difficult to fit.”
- “Most comfort issues resolve within a week.”
- “Comfort will improve with the second-generation silicone hydrogels.”
- “There is some initial adaptation with (Novartis/Ciba Vision’s) O<sub>2</sub>Optix.”

## Preferred Silicone Hydrogel Sphere Lens

Company	Brand	Duration	% choosing	Key factors in choice
Johnson & Johnson/Vistakon	Acuvue Oasys	2 weeks	52%	Comfort, ease of fitting, visual acuity, less dehydration, patient satisfaction, technological advantages, good wetting properties
Johnson & Johnson/Vistakon	Acuvue Advance	2 weeks	17%	Fewer deposits, patient comfort, affordable, easy to fit, few complications or complaints, base curve choices
Novartis/Ciba Vision	O <sub>2</sub> Optix	2 weeks	14%	Comfort, two week lenses, quality, price, tinted
Bausch & Lomb	PureVision	2 weeks and 1 month	5%	Good optics, less build up, comfort, price
Novartis/Ciba Vision	Night & Day	1 month	3%	Good for patients who want to sleep in their contact lenses
Other	---	---	9%	---

## Lenses Being Replaced by Silicone Hydrogel Lenses

Company	% saying use has decreased
J&J/Vistakon's Acuvue	53%
Novartis/Ciba Vision's Focus	12%
J&J/Vistakon's Acuvue Advance	9%
Novartis/Ciba Vision's O <sub>2</sub> Optix	7%
Novartis/Ciba Vision's Night & Day	5%
Bausch & Lomb	5%
Hydrogel Vision's Extreme H <sub>2</sub> O	2%
Other	7%

Additional comments on SiH lenses included:

- “They just take longer to settle in the eye.”
- “At first I found them very difficult to fit due to patient comfort issues. Now, most of my patients find them comfortable. I do have some patients who develop infiltrative keratitis when switched to silicone hydrogels, and they need to be switched back.”
- “(Ciba's) Night & Day silicone hydrogel lenses can be uncomfortable.”
- “Sometimes patients perceive discomfort and believe it is because of lens rigidity.”

## BAUSCH &amp; LOMB'S PureVision

Doctors described B&L's PureVision *extended wear* lenses as “good,” but comfort and cost are issues. Over the next 6-12 months, half the doctors predicted their PureVision use would increase, two said it would decrease, and the rest expect it to remain the same. Comments included:

- “It's a good lens, but a bit more expensive. I don't have a trial lens set, so I don't fit it often.”
- “It's good, but it's an old product.”
- “Some patients feel they are thicker.”
- “They're pricey.”
- “It's a good alternative to (Ciba's) Night & Day. There is a good fit on most patients. But I'm getting an increasing number of dryness complaints. Most patients can't sleep in their lenses much.”

- “I will start increasing use.”
- “PureVision seems to be less comfortable...I don't think any extended wear is a good thing.”
- “So far they are not as comfortable as (Ciba's) Night & Day.”
- “PureVision is currently my preferred extended wear contact lens.”
- “It's not the most comfortable lens.”
- “Very good but expensive.”
- “I like it. There's great visual acuity, and monthly is a modality a lot of people like.”
- “They were good when they came out a year ago, but I haven't used them since they returned to the market.”

The new B&L PureVision *silicone hydrogel lenses* were also generally described as good, but there were complaints about comfort, stiffness, and dryness. PureVision SiH lenses have been called “sturdy,” and doctors said that is mostly good because it improves handling, but it is also bad for comfort and patient perception of the lens. Comments included:

- “The lenses are easier to handle – to insert or remove – but some patients perceive them as stiff.”
- “The sturdiness makes them easier to handle, but patients may feel the lens.”
- “It gives them the image of durability.”
- “It's a good thing. Patients don't like fragile lenses.”
- “The sturdiness is especially good for patients who complain of lenses tearing.”
- “Patients perceive the sturdiness as bad.”
- “Patients feel the lenses more (in their eyes).”

Overall, sources doubt PureVision SiH lenses will take market share from Vistakon's Acuvue or Acuvue Oasys, but a few sources suggested PureVision SiH might hurt sales of Ciba Vision lenses. The key problems for PureVision were described as: Vistakon and Acuvue's strong market presence, name recognition, brand loyalty, and marketing. A doctor said, “Vistakon has a stronger presence, and patients come in

asking for Acuvue and Oasys.” Another said, “Patients know the Acuvue name, and Oasys is more comfortable.” A third said, “It will take some market share, but not a lot. I think it really hurt them to have the lens removed from the U.S. market for so long. It allowed other lenses to move into their place.” A fourth said, “The percentage of patients using this product will increase.”

More than three-quarters of these doctors said they plan to try the new PureVision toric, but their enthusiasm was generally very lukewarm. The doctors who do not plan to use the PureVision toric said they are satisfied with their current toric lens. Comments included:

- “I’ll try it because it offers better eye health.”
- “I’m looking forward to trying it.”
- “It’s good to have a selection of high oxygen permeable torics. In the past, thick, toric contact lenses caused problems due to decreased oxygen transmission.”
- “I’ll use it as a problem solver.”
- “It’s pretty stable with good parameters.”
- “I’ll use it because it has excellent optics.”

### Sales representatives

Doctors perceived little change in the quality of contact lens companies’ sales reps over the last 6-12 months. J&J reps may have improved a little, and Ciba Vision reps appear to have deteriorated a little, but the changes are small; and the ratings of sales reps for most companies remained fairly constant. The key factors in how the sales forces are viewed by optometrists are: The services the sales reps provide – and the frequency of their visits – as well as the availability of trial sets and samples.

### CONTACT LENS SOLUTIONS

Over the next 12 months, 44% of doctors predicted their overall use of solutions would increase, with 53% expecting them to remain the same, and 3% anticipating use will fall. Slightly more than half (57%) said the brand of solution they use will change as use of silicon hydrogel lenses increases.

#### Solution Most Likely to be Used with Silicone Hydrogel Lenses

Brand	% choosing
Advanced Medical Optics’ Complete	23%
Alcon’s Opti-Free Replenish	66%
Bausch & Lomb’s ReNu	9%
Other	2%

#### Changes in the Quality of Sales Reps over the Past 6-12 Months

Company	Improved the most	Comments	Deteriorated the most	Comments
Vistakon	10	More sales rep visits, Good customer service and support	7	Unwilling to deal, Never hear from sales rep, Arrogant attitude
Ciba Vision	7	New products, Advertising, Rebates, New marketing	11	Poor service, Lack of sales rep visits, High sales rep turnover, Minimal sales rep visits
B&L	7	Great service from sales rep	8	Lack of sales rep visits
CooperVision	7	Good products, Very helpful, Price, Availability of trial lenses	5	Infrequent sales rep visits, Fewer samples, Easier to get lenses from distributors
Hydrogel Vision	1	Frequent contact with office	---	---

*With respect to specific products, doctors offered these comments:*

**ADVANCED MEDICAL OPTICS’ (AMO’S) Complete.** Doctors estimated that, on average, 33% of their contact lens patients currently use Complete.

- **Advantages** – Comfort, tolerability, ease of use, better watability, less irritation, more viscosity. Several doctors also mentioned that Complete contains Taurine, a naturally-occurring amino acid. A Florida doctor said, “It’s good for cell health; it is not just a cleaner.” Another doctor said, “It’s good when other solutions are not comfortable.” A third optometrist commented, “There are no advantages to Complete now that Opti-Free Replenish is available.” A fourth doctor said, “Patients seem to like it.” Another optometrist added, “It lubricates very well and has fewer issues with dryness.”
- **Disadvantages** – Lack of samples, occasional allergy or sensitivity. A doctor said, “Patients can have less tolerance to the increased viscosity.” Another optometrist said, “There is a gummy feel for some patients.” A third doctor didn’t like that it comes in a blue bottle like ReNu.

**ALCON’S Opti-Free Replenish for silicone hydrogel lenses.** Doctors had high praise for Replenish, with many describing it as excellent or outstanding.

- “Dry eye patients notice a difference, but normal patients not so much.”
- “It’s a good product.”
- “It’s better than the previous Opti-Free.”
- “It definitely helps lenses stay comfortable longer.”
- “I haven’t used it yet, but I am anxiously waiting for it.”
- “It’s very good, but I don’t have enough long-term feedback yet.”

**BAUSCH & LOMB’S ReNu, a multipurpose contact lens solution.** Very few doctors (21%) were aware of the infection issues that were seen in Asia with ReNu, but those who did know about it thought it might affect usage in the U.S.

In February 2006, B&L suspended sales of ReNu in Hong Kong and Singapore due to the detection of cases of fungal corneal infections (keratitis) in ReNu users. At least 39 cases were reported in those two cities over the previous year, and most were reported to be ReNu users.

Optometrist comments on ReNu included:

- “I’ve been told B&L will stop sending starter kits, secondary to lack of use, and that they may only be providing coupons.”
- “I don’t use it. They want to charge me for starter kits to give to patients.”
- “If that information (about the keratitis in Asia) falls into the hands of a lawyer, it can be used against any doctor at any time.”

No significant price discounting was reported, but many doctors said they don’t pay attention to consumer pricing. Among the comments about price were:

- “I never look at the price.”
- “Generic or ‘Sam’s Club’ type buyers will always be present. They pay double for contact lens solution-induced problems when they have medical problems. They are the ones who over wear their contact lenses and don’t replace them until they ‘hurt.’”
- “I’ve seen coupons for \$1.00 off.”
- “Solutions are a loss leader for drug stores.”
- “There is a big movement to house brand solutions.”
- “I just don’t see big differences among the solutions. Some patients have a strong preference for one brand or another, but most don’t care and seem to switch to whatever is on sale.”

### DRY EYE

Among these doctors, the most commonly prescribed dry eye drug is Allergan’s Restasis (cyclosporine 0.05%), followed by two artificial tear drops – Alcon’s Systane and Allergan’s Refresh, in that order. A doctor commented, “I prescribe Allergan’s Refresh Liquigel for uninsured patients, and Restasis for insured patients.”

Systane was described as very good, and comments were mostly positive, including:

- “I love the availability of samples to dispense.”
- “It works in some patients.”
- “It is stable and comfortable, but patients complain of thickness and heaviness.”
- “It’s my first choice for dry eye.”
- “I can’t seem to obtain samples.”
- “It’s another artificial tear.”

- “I like the BID dosing.”
- “I love it! Some dry eye patients find it too oily, but more severe patients seem to appreciate that feature.”
- “It’s good, but it doesn’t seem to have any tangible benefits over Refresh Tears.”
- “Systane turned out not to be as good as it was advertised. A lot of patients don’t care much for it. It’s no better than its competition.”
- “I like it, but it is hard to get samples.”
- “I do not like the fact that you cannot yet use it with cataracts. And patients feel that short-term relief is better than long-term.”

### Factors in Decisions to Try A New Eye Product

Clinical Studies/research	Journal articles
Colleagues’ experiences	Good preservative
Efficacy	Duration of symptom relief
Samples	Price
Low risk of hypersensitivity	No sting
Sales rep	

AMO is launching a new dry eye product later this year or early next year, but very few of these doctors had heard anything about that. However, they did not think it would be difficult for AMO to get doctors to try it. A doctor commented, “It will depend on insurance coverage.” Another said, “It will be easy to get doctors to try it if AMO provides samples!” A third said, “I will try it because so many people have problems with dry eye and nothing seems to work.”

### GLAUCOMA

The choice of preferred prostaglandin split almost evenly between Alcon’s Travatan (travoprost) and Pfizer’s Xalatan (latanoprost), with only 7% of doctors saying Allergan’s Lumigan (bimatoprost) is their No. 1 choice. Even though Xalatan is not covered by Florida Medicaid, it still is more popular with Florida doctors than Lumigan. Xalatan’s advantages are its proven track record and inclusion in most formularies. No requirement for refrigeration, proven efficacy in African-Americans, and plenty of samples contribute to the popularity of Travatan. A Travatan user said, “Alcon has a humanitarian program for my indigent patients, so I’ve changed other patients over to Travatan to support the company.” A Xalatan user added, “It is safe, proven, and has fewer side effects.” Another doctor explained why he doesn’t use Lumigan: “It caused vitritis in one of my patients.”

In the last six months, use of Travatan went up, and use of Xalatan went down. This trend – more Travatan and less Xalatan – is expected to continue for the next 6-12 months as well. Lumigan also is losing share, but not as much as Xalatan. These trends are driven only in part by formularies since only 44% of doctors reported recent changes in their

formularies. The key problems for Xalatan are a lack of samples and a failure of Pfizer reps to visit many optometrists. Alcon has a new “device” to help patients administer Travatan and remember to take it. However, only three doctors had even heard of this product.

### NEW ANTIBACTERIAL, ANTI-INFLAMMATORY, AND PAIN MEDICATIONS

In the battle of combination products, a new antibacterial/anti-inflammatory, **BAUSCH & LOMB'S Zylet** (loteprednol etabonate 0.5% plus tobramycin 0.3%), has made little headway against **ALCON LABORATORIES' TobraDex** (tobramycin 0.3% plus dexamethasone 0.1%). TobraDex is entrenched as the preferred antibacterial/anti-inflammatory drug; it is used by 93% of sources, with only 7% using Zylet.

TobraDex has proven efficacy and safety, and Alcon sales reps have marketed it well, giving optometrists plenty of samples. As a result, doctors said they are comfortable with TobraDex and see no reason to switch. A doctor said, “I’ve had a history of great results (with TobraDex)!” Another commented, “I’ve used TobraDex a long time. It’s proven and very effective. There is no B&L sales rep in our area, but TobraDex needs a competitor.” A third doctor said, “Everyone knows TobraDex, and because it works so well, they are reluctant to try a different one.” A fourth doctor said, “TobraDex was first to market, and more physicians are familiar with it.”

In contrast, sources emphasized that B&L has not marketed Zylet well, at least to optometrists. Repeatedly, optometrists complained they aren’t seeing B&L sales reps and do not have samples. A check of the B&L website ([www.bausch.com](http://www.bausch.com)) produced no information on Zylet, either. A doctor said, “From what I’ve read, Zylet is a weaker drop in comparison to TobraDex, and TobraDex has been a mainstay drug for a long time.” Another said, “The company hasn’t gotten the word out. They need to push it more with the doctors.” An Ohio doctor said, “The B&L sales force in Ohio is non-existent.”

Only six optometrists said they have had any experience with Alcon’s Nevanac (nepafenac ophthalmic suspension 0.1%), a new NSAID for post-surgical pain. Four said it is good for clinically significant cystoid macular edema (CME), one just started using it and has no opinion yet, and one was very negative on it, saying he does not recommend its use.

### REFRACTIVE SURGERY

Refractive surgery referrals are up an average of 7% in the first three months of 2006 compared to 4Q05, and up an average of 2% compared to 1Q05. Doctors predicted that referrals will be flat for the next three months. For all of 2006, more than half the doctors (58%) expect refractive surgery referrals to remain comparable to where they are now, 40%

predicted referrals will increase, and only one doctor said referrals would decrease.

Comments on volume trends included:

#### Increase

- “Patient marketing will increase volume during 2006.”
- “People are getting more comfortable with the idea of the procedure, and results are more predictable, with less glare, halos, etc.”
- “My referrals will increase because we have started asking patients about refractive surgery.”
- “The economy is strengthening, LASIK results over time are good, and new LASIK techniques are exciting to patients.”
- “The media and PR increase the interest level.”
- “I think more people are getting comfortable with the time LASIK has been around, costs have decreased, and some vision plans are helping (patients pay for it).”

#### Slowdown

- “Those who have always wanted to do it are done. And more patients are bypassing the referring optometrist and going to surgery centers directly.”
- “The pool is shrinking.”

More than half (54%) of refractive surgery patients are getting custom LASIK, and by the end of 2006, that is expected to remain relatively unchanged at 55%.

#### INTRALASE FS30 femtosecond laser

Half of these doctors have patients who have had a LASIK performed using an IntraLase FS30 to make the corneal flap. A small but significant number (16%) are preferentially referring patients to surgeons who have an IntraLase laser, and 20% are avoiding referrals to surgeons without an IntraLase laser.

Among the comments about IntraLase were:

- “I like the flap the femtosecond laser makes...but whether or not I refer patients to a surgeon with an IntraLase depends on the degree of myopia.”
- “It’s a state-of-the-art procedure.”
- “I’ve referred a couple of patients, but it is expensive.”
- “The IntraLase makes good, clean flaps with no significant increase in DLK. I let the surgeon decide which is best, but the surgeons I work with all use IntraLase.”
- “I recommend it to all my patients.”



- “I don’t preferentially refer patients at present, but I’m aware of (one doctor in the area) who has it, and I understand the benefits.”
- “I’ve been told by very experienced, respected surgeons that they have not seen any true advantage to IntraLase to warrant the expense. I trust that and believe that IntraLase is just a marketing tool.”
- “It makes patients much more comfortable.”
- “It’s too expensive for the benefit.”

Sources really didn’t have much of an opinion about how the merger of Advanced Medical Optics and Visx is going.

### **MULTIFOCAL IOLS**

Doctors said 11% of their cataract patients are getting multifocal IOLs, with slightly more patients getting AMO’s ReZoom than Alcon’s ReStor. Furthermore, two-thirds of doctors commenting said ReZoom is gaining popularity the most. More than a third of the doctors said they’ve heard about multifocal IOLs having to be explanted, or even had a few cases. One doctor said he’d heard Eyeonics’ Crystalens had to be explanted occasionally. Another doctor said he’d heard of Array lenses that had to be explanted. A third said, “I have three patients who had to have an Array lens explanted, for a total of six eyes.”

A few optometrists have had patients get an Eyeonics Crystalens, and they were relatively satisfied with the product. One doctor said, “My patients are 80% satisfied.” Another commented, “My patients are moderately satisfied.” A third said, “I have one unhappy patient, and another patient who is satisfied.” A fourth commented, “My patients have been very satisfied.”

However, these doctors were not familiar with AMO’s Tecnis multifocal IOL or the recent new technology status for it, so they could not comment on its outlook vs. Alcon’s AcrySof.

