



# Trends-in-Medicine

March 2003

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## SUMMARY

◆ Optometrists are excited about Allergan's Restasis, which may expand the market, but use will be dictated by formulary inclusion and cost. ◆ Pfizer/Pharmacia's Xalatan is continuing to lose market share, but slowly, to Allergan's Lumigan and Alcon's Travatan. ◆ Johnson & Johnson/Vistakon has the most momentum in contact lenses, but CooperVision also is likely to be a winner. Doctors could find little good news for Bausch & Lomb. ◆ If a generic brimonidine becomes available, doctors expect strong pressure from managed care and Medicaid to switch patients to that from Allergan's Alphagan-P. ◆ Refractive surgery (LASIK) procedures have not picked up, and no improvement is in sight.

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## Trends-in-Medicine

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## EYECARE UPDATE -II

To check on trends in the eyecare field, 50 optometrists attending a medical education course in Miami, Florida, in March 2003 were interviewed. This is a short, follow-on report to similar interviews conducted with other optometrists earlier this year (See *Eyecare Update*, January 2003, Trends-in-Medicine).

### DRY EYE

It continues to appear that Allergan's Restasis (cyclosporine emulsion) eye drops will be a winner. The level of excitement/enthusiasm for Restasis was even higher than doctors previously indicated, described as high by 47%, average by 50% and low by only 3%. Overall, the outlook for Restasis was described as: Great 24%, Good 62%, Guarded/poor 14%.

As in January, 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.

Allergan plans to launch Restasis in April 2003. Most optometrists are aware of the product and expect to use it for a significant percentage of their dry eye patients. However, doctors warned that Restasis will need to get on formularies before they will use much of it, and so they were divided as to how quickly it will catch on. One doctor commented, "Use will be even higher if it really works."

- Three months after formulary inclusion, doctors expect to have 25% of their dry eye patients on Restasis.
- Six months after formulary inclusions, they expect to have 36% of their dry eye patients on Restasis.

A remarkable 78% of doctors also believe it is more efficacious than other dry eye therapies currently available. Furthermore, 65% of doctors predicted that patients will be willing to stay on this therapy long-term. A doctor said, "It is difficult to keep patients on medications long-term, but if they see a significant change in comfort, they may be willing to stay on this."

Most doctors plan to use Restasis for patients who have tried and failed other lubricant drops. They generally do not plan to reserve it for patients who also fail punctal plugs. A doctor said, "This is a great drug for severe cases who do not get relief from lubricants." Another said, "It looks excellent for women on birth control pills, women in menopause, women on HRT – women in general. They are all looking for treatment for dry eye."

## GLAUCOMA

These doctors are slightly heavier users of Travatan than the doctors questioned in January, but the trends are the same: a projected decline in use of Pfizer/Pharmacia's Xalatan (latanoprost), with small gains expected by both Allergan's Lumigan (bimatoprost) and Alcon's Travatan (travoprost). One doctor said, "There is a lot of pressure from formularies and Medicaid to use Lumigan, but it has too many side effects."

Drug	% of patients currently taking	Outlook in 6 months
Xalatan	56%	49%
Lumigan	15%	19%
Travatan	29%	32%

Doctors switching:

- **from Xalatan to Lumigan** -- said Lumigan use is going for up for a variety of reasons: formulary changes, lower cost, greater efficacy, and more samples from Allergan.
- **from Xalatan to Travatan** -- cited patient preference and greater efficacy.

The overall market for these medications has been sluggish lately, and doctors cited several reasons: cost, the OHTS study (Ocular Hypertension Treatment Study), the economy, formulary restrictions, and cash-strapped patients not filling prescriptions. Medicaid also has become more restrictive on use of these drugs, most doctors agreed. A doctor explained, "The OHTS study concluded that we don't have to treat every person with high IOP." Another said, "Patients aren't filling prescriptions for expensive eyedrops."

If and when the FDA grants approval to Pfizer/Pharmacia's Xalcom, a combination of Xalatan and the beta blocker timolol, optometrists expect to use it. In fact, 62% predicted Xalcom would do well, 14% thought it would be "average," and 24% thought it would have little impact on the glaucoma market. Most doctors said they plan to use Xalcom for new patients but they also intend to switch patients already on dual therapy (prostaglandin+beta blocker). They expect Xalcom to decrease their use of all the other glaucoma prostaglandins (Xalatan, Lumigan and Travatan). One doctor said, "First, I'll switch existing patients on two medications." Another said, "I'll try it immediately, but how it does will depend on what patients think of it."

If Alcon introduces a branded generic brimonidine, it probably won't be A/B rated, so it won't be a true generic. Most optometrists said they hope they can continue prescribing

Allergan's Alphagan-P (brimonidine with purite). The concern expressed by many is that HMOs may require that they immediately switch patients from Alphagan-P to generic brimonidine: 82% of doctors expect strong managed care pressure to switch patients.

## CONTACT LENSES

Doctors could not identify any "game-changing" technology coming in contact lenses that might cause significant brand changes. As in January, doctors cited Johnson & Johnson/Vistakon as the contact lens company considered to have the most momentum in the current marketplace – the one they believe will do the best over the next six to 12 months. CooperVision came in a distant second, and Novartis/CibaVision got a few votes. Bausch & Lomb was mentioned by only one doctor. A doctor said, "Vistakon has name recognition, is popular and advertises." Another doctor said, "Vistakon will gain due to increased advertising." A third commented, "There is a lot of negativity about CibaVision right now. There's a backlash against Ciba by doctors who had B&L lenses in the office and now can't prescribe them [NOTE: because of the patent suit which Ciba won, requiring B&L to take PureVision lenses off the U.S. market]. They are mad at Ciba for suing B&L."

Doctors also had somewhat different predictions for their own practices. Among these doctors, the companies most likely to increase business over the next year are CooperVision and Johnson & Johnson/Vistakon. Sales for all of the other companies, including Novartis/CibaVision, Ocular Sciences, and B&L, are likely to be unchanged in these practices. A doctor said, "I use Acuvue most frequently because of convenience." Another commented, "CooperVision has great products and competitive pricing." Several complained that getting trial lenses/samples from J&J is difficult.

Compared to six months ago, contact lens solution use is flat, almost every doctor agreed, and the trend is for a continued flat market. All three major brands -- Alcon's OptiFree, Bausch & Lomb's Renu, and Allergan's Complete -- were described as fairly comparable, but OptiFree continues to be the most popular and most frequently recommended. A doctor said, "I recommend OptiFree because that's what I use. Differences exist (among them), but patients categorize them as 'all the same.'"

Doctors do not expect any significant market share shifts in contact lens solutions occurring over the next six months. However, two sources noted that B&L has been generous lately with starter kits and that may boost use of Renu. There also was a report that B&L is aggressively trying to push Renu through sampling, and that source thought the strategy might pay off, at least to some extent.

## MISCELLANEOUS

### BAUSCH & LOMB

*These doctors had little good news for Bausch & Lomb:*

- **The SofLens66 toric remains very popular**, and is not yet being replaced by another brand. A doctor said, "The Soflens66 is still my personal favorite."
- **J&J/Vistakon is not perceived as making a strong push in torics**. One doctor said, "J&J is making a decent, but not strong, push."
- **B&L's Ocuville vitamins appear to be holding their own**. Many doctors offer B&L's Ocuville vitamins in their offices, and Alcon's new Icap vitamins do not appear to be taking much market share from Ocuville. A doctor said, "We offer Ocuville because B&L provides information script pads that are easy to hand out and educate the patient."

*In fact, most of the B&L news was less positive to downright negative:*

- **Marketing and sales have not improved**. Doctors described the company's efforts as: Poor 79%, okay 17%, good 4%. One said, "B&L marketing and sales are not effective at all."
- **The new multifocal lens is not lighting any fires**. Nearly half the doctors (48%) have never tried it. Of those who have, 58% described it as poor, and 42% as good. One doctor said, "It has good handling and I'm somewhat impressed. It has good distance vision, but it falls short for reading." Another doctor said, "I got samples and tried it, but I'm not happy about the hi/low adds." A third said, "I like it, but patients don't."
- **No market share gains**. As noted above, there is no shift to greater use of B&L lenses.
- **Toric pricing is flat to slightly down**, and the SofLens66 toric is one of B&L's few remaining strong spots. A doctor said, "Toric pricing has become much more affordable to patients." Another said, "Patients get more now for the same amount of money."

### Sales and promotions

- These doctors said they have not seen any unusual attrition in the sales force of B&L, Alcon or Allergan.
- The company offering the most aggressive product promotions was J&J/Vistakon, though B&L, Alcon and Allergan also have had recent promotions. CooperVision was described as the least promotional currently.

### Refractive Surgery

There continues to be *no pickup* in LASIK referrals or patient interest in refractive surgery. One doctor said, "It's a stagnant market." Another said, "Patients are apprehensive of the long-term effects due to information on the Internet and websites of laser treatments gone bad."