



Trends-in-Medicine

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by D. Woods and Lynne Peterson

Quick Pulse

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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

LASIK UPDATE

Twelve refractive surgeons, the CEO of a refractive surgery company with multiple centers, and an industry expert were interviewed about trends in refractive surgery. Doctors indicated LASIK procedures during the second quarter of 2006 (April, May, and June) are looking flat compared to the same time period last year and down an average of 5.2% compared to the first quarter of this year.

Procedure volume. Comments on overall procedure volume included:

- *Missouri:* "January of this year was off by 20% compared to January 2005. We are down 9% in the second quarter compared to the first quarter, and January accounted for the weak first quarter. I understand this was the case coast to coast."
- *Illinois:* "We're the same as 2005, which was a good year. The first quarter in my area is always the busiest LASIK quarter of the year."
- *Texas:* "The first quarter is relatively flat compared to last year."
- *Midwest:* "Procedures are considerably down. We have always been in the black on LASIK and refractive numbers and to be this much behind the eight ball has been disturbing, especially as we increased our marketing efforts and spending in 4Q 2005."

Most sources predicted flat to slightly down procedures during the third quarter of 2006, with four saying it is still too early to tell.

- *Florida:* "We have cases booked for every week in June; nothing for July yet."
- *Texas:* "Most patients only book out a couple of weeks to a month, so it's unclear."
- *Illinois:* "It's a little early to tell what bookings will be like in the third quarter."
- *Missouri:* "I expect the third quarter to be flat. Historically, the third quarter is the lowest volume quarter in the U.S."
- *Minnesota:* "We haven't started booking for the third quarter yet. I would guess that (volume) would be slightly down or flat compared to 3Q 2005."
- *Midwest:* "I'm waiting to see if this (slowdown) is a national trend and to what degree, most specifically to practices similar to ours."

Dave Harmon of *Market Scope* estimated that first quarter refractive procedures were down 2% compared to the same period in 2005, and he said the outlook is only slightly better for the second quarter of this year, "April was a good month, and May started out okay, but the market softened in mid-May, and I think the quarter will be soft...I attribute this to economics. Consumer confidence was strong in April. We haven't seen the May number, but it is likely to be down. The air has gone out of the stock market, and gas prices are still high."

Custom LASIK accounted for an average of 78% of these doctors' procedures, up about 7% from the same time last year. Only one doctor said his custom procedures are lower.

- *Missouri*: "Custom in 2005 was 45% and is 55% in 2006."
- *Utah*: "Half of our procedures are wave-guided."
- *Illinois*: "All of our procedures are custom, same as last year. We use WaveLight Allegretto, wavefront optimized."
- *New York #1*: "Custom is 85%, up from 50% last year."
- *New York #2*: "Nearly all myopic treatments, except for retreatments, are custom, and this is the same as last year."
- *Texas*: "Custom is lower here, only because the Bausch & Lomb unit is so good at traditional LASIK. It's generally as good as or better than other units' custom treatments. It's coming out with a brand new unit to upgrade this summer, much faster and anticipated much better. We are testing it now. There is also a custom unit from Visx (Advanced Medical Optics) that may be better and come closer to the traditional B&L basic unit."

Refractive lens exchange. With one exception, sources said they are doing refractive lens exchange (RLE) in an average of 5% of their patients, and the numbers are increasing but slowly. The exception was a vision center CEO who claimed 40% of their patients are getting refractive IOLs. A Florida doctor said, "It's less than a 5% mix; we are still experimenting with lasers." A Utah surgeon said, "We're doing about 10 RLEs a month, and this is increasing." A Texas surgeon said, "We're doing less than 5% (RLE)." An Illinois doctor added, "I do a few refractive lens exchanges but not a lot."

However, surgeons who do cataract as well as refractive surgery said a growing number of cataract patients are getting multifocal IOLs. An Illinois doctor said, "I do a fair number of cataracts... The percentage of cataract patients who elect to have a premium implant (multifocal) is growing. Currently this is at 14%, and I think it may go as high as 25% or even more, which I wouldn't have predicted a year ago."

Multifocal IOLs. Surgeons said they use a mix of Alcon's ReStor, Advanced Medical Optic's ReZoom, and Eyeonics' Crystalens for RLE and cataract procedures. Comments included:

- *New York #1*: "I use ReStor 60% and ReZoom 40%."
- *Minnesota*: "I mostly use ReZoom."
- *Missouri*: "We use the Crystalens the most – probably 85% – with AMO's ReZoom about 15%. It appears that mixing and matching may work better than initially thought. Crystalens in the dominant eye and ReZoom in the non-dominant eye appears to work very well."
- *Illinois*: "I use all three – ReZoom, ReStor, and Crystalens, about a third each."
- *New York #2*: "I do RLE with the ReStor lens."

Femtosecond lasers. At the Association for Research in Vision and Ophthalmology (ARVO) meeting in April, Ziemer Ophthalmic Systems reported on the first humans – five melanoma patients – using its DaVinci femtosecond laser. The DaVinci has a handheld laser head, eliminating the need to move the patient after the creation of the femtosecond laser flap and before laser ablation surgery. Most doctors questioned said they have not seen Ziemer's femtosecond laser yet, although there is some interest in it, and one source suggested there may be more data on this device at the American Academy of Ophthalmology (AAO) meeting in Las Vegas in November 2006.

Comments on the Ziemer femtosecond laser included:

- *Missouri*: "It hasn't shipped yet in the U.S. I have seen it, and the articulating arm is interesting. It could allow for a smaller room footprint and faster patient flow."
- *Florida*: "It is possibly a very good lower cost alternative, but they need to do more clinical trials, more human studies."
- *Utah*: "We have no experience with that laser. Our IntraLase is great!"
- *Illinois*: "I did look at the Ziemer femtosecond laser at the (ASCRS) meeting and spent some time talking to a man who turned out to be the inventor of the machine and head of the company. I think it may be ready in the future, but at present it is a long way from clinical reality. It's not ready for prime time – not yet. I don't use IntraLase. With our Nidek keratome, we get more reliable flap thicknesses than the IntraLase published data."
- *Texas*: "We have had an IntraLase for almost two years. We have six surgeons using it, and they all like it a lot. Ninety-nine percent of LASIK is performed with the IntraLase. Most (of our surgeons) will never go back to using a microkeratome due to the higher quality, safety, consistency, and ease of use (of the IntraLase). I'm not sure we know very much about the new femtosecond laser, and I'm not especially interested, as we have no issues with the IntraLase... IntraLase will also be installing twice the current speed of the unit this summer for those who choose to upgrade. The issues for us are predominantly centered around cost and affordability, not outcomes because when one uses it, one rarely goes back to a traditional microkeratome unless the cost factor becomes overwhelming, which can be an issue at lower volume levels or in very price-sensitive markets."
- *New York*: "I have seen the Ziemer, and it cuts like a blade rather than the IntraLase, which makes a lamellar plane and then connects to the surface."
- *Minnesota*: "It sounds like a reasonable option. It's still a femtosecond, with an easier footplate and usability, but it is not widely used yet. I think it should do well."
- *Illinois*: "I think it will take a long time for it to have any significant influence on IntraLase." ♦