



Trends-in-Medicine

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by Lynne Peterson

SUMMARY

The economic downturn is hurting optometrists, with patients skipping appointments and stretching how long they wear their contact lenses. Patients also are not upgrading or buying as many accessories. ♦ Contact lens fittings are down very slightly vs. 6 months ago, but they are expected to hold steady over the next 6-12 months. ♦ Prescriptions for once-daily soft contact lenses are up. ♦ Contact lens manufacturers have increased their incentives, with CooperVision the most aggressive, and that appears to be paying off because CooperVision is gaining market share with Biofinity and Avaira silicone hydrogel lenses at the expense of both Bausch & Lomb and Johnson & Johnson/Vistakon. ♦ Abbott Medical Optics (AMO) appears to have a winner with its new, over-the-counter dry eye drop, blink Tears. Use of Allergan's prescription Restasis is stagnant, primarily because of cost. ♦ Optometrists are dragging their feet on electronic medical records, and half **never** plan to adopt EMRs.

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EYE CARE UPDATE #2

To check on trends in the eye care field, 27 optometrists, mostly from Florida, were interviewed at the Dade County Optometric Association's Miami Nice Education Symposium in Coral Gables on April 18 and 19, 2009. They offered opinions and outlooks on the economy, contact lenses, dry eye, and the adoption – or lack of it – of electronic medical records.

THE ECONOMY

Optometrists are being hit hard by the recession. Almost three-quarters said business is down. On average, patient flow has declined 16% over the past few months, and the number of patients not showing up for appointments has increased. Comments included:

- “My practice hasn't been affected by the recession yet, but some patients are losing their jobs.”
- “I've seen a decline in eyeglass sales, and more patients are taking their prescription to Costco or online, etc.”
- “Patients are spending less money on frames and contact lenses.”
- “At first business slowed considerably, but it has picked up in the last 3-4 weeks.”
- “The recession has made people more conservative in their spending.”
- “I closed a 30-year-old practice.”
- “I'm seeing more no-shows, and people are more hesitant to purchase new lenses.”
- “Patients are delaying checkups, decreasing the purchase of extras on glasses.”
- “Patient volume is down in spurts.”
- “The recession has reduced high-end sales.”
- “I'm seeing fewer people, and they are spending less.”

Industry sources also said that they are seeing the recession stress doctors and patients, and it is affecting their business as well as the doctors'. Among their comments were:

- “The recession is not affecting (spectacle) lenses as much as frames. Patients are not spending as much money in eyewear as they used to do. They also want to use their vision benefits **now** – before they lose their job. They are still buying thinner and progressive lenses, but they are not choosing transitions or anti-reflective coatings.”

- “Doctors are looking at alternative ways to generate revenue, and patients are looking for alternate ways to improve their health.”
- “Consumers are more conservative with their spending. They don’t always change a frame if it is still good or if their prescription hasn’t changed. And they are choosing cheaper frames. There is less focus on brand and fashion.”
- “Patients are spending less and wanting to deal. They are stretching their lenses longer than they are supposed to do.”
- “There is a fear factor. Patients are almost paralyzed in making decisions.”
- “Optometrists who are mostly medically-oriented haven’t seen a big effect from the recession, but those only relying on contact lenses, LASIK, and spectacles are hurting.”
- “Every day I hear about patients wearing their lenses longer, especially the two-week wear lenses.”
- “Exam counts are flat, optical business is down, and some patients are moving from contact lenses to spectacles, while others are stretching how long they wear their contact lenses.”
- “Doctors who are primarily insurance-based are surviving, but if they have mostly private-pay patients, they are hurting. For the doctors taking insurance, patients are using their benefits but not spending much out-of-pocket above that.”

So far, 75% of optometrists said the economic stimulus program has not helped them in any way.

- “The economic stimulus package? Ha! Ha!”
- “The economic stimulus package seems to be working, if ever so slightly.”
- “I haven’t seen any effect from the stimulus package, but, on the other hand, if the banking industry filed bankruptcy, the entire economy could have gone down 50%-75%.”
- “The stimulus package hasn’t helped at all. In fact, it hurts because people worry about the huge deficit.”

Optometry and the Economy

Issue	Negative effect or decreasing	Minimal or no effect	Starting to have small positive effect or improving	Unknown or no answer
Effect of the recession on your practice	72%	24%	4%	0
Effect of the economic stimulus program	5%	75%	5%	15%
Patient flow volume over the past few months	42%	58%	0	0
Patient no-shows	31%	69%	0	0
Expectation for patient volume over the next 6 months	12%	71%	17%	0

CONTACT LENSES

Contact lens fittings are down an average of 3% over the last six months for these doctors, and they are expected to remain flat for the next 6-12 months. What is affecting contact lens fittings? Doctors said it is primarily a combination of the economy, a drop in patient flow, and patient frugality, but seasonality and mail order lenses are also a factor. Comments included:

- “Contact lens fittings are consistent with the patient flow.”
- “Patients are over-wearing their lenses.”
- “Patients are being more frugal.”
- “Monthly modalities are up as are daily lenses, but two-week lenses are losing market share.”

More than half the doctors said they are prescribing more once-daily soft contact lenses, primarily because of cost and hygiene, though doctor recommendations and convenience are factors. All but two optometrists said patients are wearing their two-week contact lenses longer than two weeks, and almost half said they have seen an increase in patients wearing their lenses longer. One commented, “It’s a cost issue. They stretch out the wear.” Another said, “I’m trying to prescribe once-daily lenses more frequently, but patients are concerned about the cost.”

However, most optometrists did not report an increase in patients giving up contact lenses and returning to spectacles. The 27% who have seen an increase in switches to spectacles said the key reasons were cost, dry eye, and style. One doctor said, “Patients are getting older, and they have more dry eye symptoms.”

To encourage use of their lenses, manufacturers have increased their incentives, primarily rebates, but also volume discounts, coupons, and free shipping to the patient. Doctors said CooperVision has had the most aggressive incentive programs, with Novartis’s Ciba Vision and Johnson & Johnson/Vistakon tied for second place, and Bausch & Lomb No. 3. One doctor commented, “I only use the rebates if we determine the lens to be the best fit.” Another source said, “Bausch & Lomb, Ciba Vision, and CooperVision are offering the most incentives, and incentives are a big factor. J&J is not doing incentives, but it is still doing consumer advertising, which brings patients into doctors’ offices, and it is the only company doing that. . . Doctors are spending more time trying to sell annual supplies to patients, but they need to do that even more. If they did that more, they wouldn’t lose patients to Wal-Mart and Costco, and they would get their profits upfront.”

Contact Lens Use Overall

Contact lens vendor	% of contact lenses in 2008	% of contact lenses now	% of contact lenses in 6-12 months	Most commonly used lens from this company
Bausch & Lomb	10%	8%	6%	SofLens
CooperVision	15%	17%	23%	Proclear
J&J/Vistakon	62%	63%	56%	Acuvue Oasys
Novartis/Ciba Vision	12%	11%	13%	FreshLook
Other	1%	1%	2%	Rigid gas permeables

Asked to name the best and worst brands of contact lenses, Johnson & Johnson/Vistakon's Acuvue came out as both the best and the worst lens! Perhaps the surprise was that CooperVision came in as the second best, with no votes as the worst lens.

Contact Lens Rankings

Company	Best	Worst
Johnson & Johnson/Vistakon	61%	50%
Bausch & Lomb	0	30%
Novartis/Ciba Vision	0	10%
Ocular Sciences	0	10%
CooperVision	39%	0

Vistakon's Acuvue Oasys remains the king of the contact lens hill. Competitors have gained a little ground recently, and doctors predicted J&J will continue to lose a little share over the next year, but J&J has some new things coming that may re-strengthen its position, including:

1. A one-day silicone hydrogel lens. This has already been launched in Europe.
2. Acuvue Oasys for Presbyopia. This is expected to launch in the U.S. by the end of summer 2009.
3. Acuminder-in-office. This is a free patient-reminder web-site (www.acuminder.com).
4. Acuvue Direct. This is a contact lens subscription service for patients.

CooperVision's Biofinity silicone hydrogel (SiH) contact lens is already being fit by 60% of these optometrists, and most rated it good to great. Of the users, half said use has increased over the last six months by an average of 20%. One source said the pickup came when monthly extended wear lenses became available.

Opinions of CooperVision Biofinity SiH Lens

Opinion	Ranking
Excellent	17%
Good/great	47%
Comfortable	12%
Lens awareness issues	6%
Price issues	6%
May try it	6%
No opinion	6%

Comments about Biofinity included:

- "It's great."
- "It's a good lens, but I don't prefer monthly lenses."
- "It fits well."
- "I try it if Oasys is not acceptable."
- "It's a good lens, but there are some lens awareness and price issues."
- "It's the best monthly silicone hydrogel for comfort."

CooperVision Lenses Use

Lens	Holding/gaining
Frequency	22%
Proclear	22%
Biomedics	17%
Vertex	14%
Avaira	9%
Hydrasoft	9%
Expressions	5%
Preference	2%

Slightly more than half the doctors had already heard about **CooperVision's new Avaira**, a two-week silicone hydrogel lens that was launched recently, and 45% plan to start prescribing it, while 36% were undecided, and 18% said they don't expect to prescribe it in the future. For these doctors, Avaira will replace primarily Vistakon's Acuvue. Right now, Avaira only comes in negative powers (for myopes), but it appears to be doing well and taking market share from J&J's Acuvue Oasys and CooperVision's own Expressions lenses. A source said, "The jury is still out on Avaira, but it is priced very aggressively."

DRY EYE

Abbott Medical Optics (AMO) recently launched a new, over-the-counter dry eye drop, blink Tears, and 68% of these optometrists are already recommending it to patients. However, only 14% prescribe Allergan's Restasis (cyclosporine A), and that is only expected to increase to 15% over the next 6-12 months. Restasis is recognized as being effective, with 74% of doctors rating it good-to-excellent, and more than half saying the durability of the effect is good or excellent. Cost is the use-limiting factor. Burning, compliance, and patient anxiety are also issues, but it is cost that is the real barrier to Restasis use.

Comments included:

- “Patients are not always receptive to a prescription medication for dry eye, even though you educate them that it is a progressive, chronic condition.”
- “Besides cost and lack of efficacy, the problem with Restasis is that patients can’t stop using it.”
- “I love Restasis. I get 80% success with it.”
- “Restasis works very well if the patient is compliant.”
- “The durability of Restasis is variable, but patients are usually happy if they are using it on a regular basis.”

Asked if Allergan’s marketing message of treating pre-cataract patients with Restasis has been effective, doctors almost unanimously agreed that it hasn’t. Several doctors commented that they’ve never even heard of this.

ELECTRONIC MEDICAL RECORDS AND E-PRESCRIBING

The Centers for Medicare and Medicaid Services (CMS) is offering incentive payments starting in 2011 for doctors who adopt a certified electronic medical record (EMR) and use it meaningfully that can total as much as \$44,000. Then, beginning in 2015, CMS will penalize doctors who don’t have an acceptable EMR by reducing their Medicare/Medicaid reimbursement. Despite the Obama administration’s emphasis on EMRs and e-prescribing – and incentives from CMS – optometrists are not very interested in EMRs.

Only 15% of these optometrists currently have any kind of EMR: 2 NextGen, 1 MyVision Express, 1 OfficeMate, and one of the doctor’s own design. Thus, maybe two currently have systems that are likely to be able to meet CMS’s requirement for a “certified” system that also meets the definition of “meaningful use.”

Though meaningful use has not yet been defined, it will mean a robust system with interoperability, not just records scanned into a computer. Another issue in the choice of an EMR will be its level of interoperability. Currently, only eClinicalWorks and Greenway Medical Technologies have CCHIT Operability Level 3, though other systems are expected to gain that level in the future.

This year, only 9.5% of doctors plan to adopt an EMR, with 33% implementing a system in 2010 and 9.5% in 2011. The other 48% *never* plan to get an EMR. The main reasons cited for not getting an EMR were: cost and nearness of retirement. A third of doctors said they will not get an EMR unless the government or insurance companies mandate it.

Doctors also really know very little about the potential vendors. They were largely unfamiliar with these leading vendors:

- **NextGen Healthcare Information Systems**, a subsidiary of Quality Systems – A large local ophthalmology practice as well as Nova Southeastern College of Optometry is using this, so there is some awareness of this vendor and some incentive for local doctors to adopt the system. However, users reported it is a tough install, especially for a very small practice.
- **Allscripts** – This company is well-known in healthcare IT circles and has more than 150,000 physician customers, though not all of these use its EMR. However, Allscripts is less well-known by community-based physicians, and none of the optometrists at Miami Nice were familiar with it.
- **Athenahealth** – This company offers a simple, turn-key, web-based system, but a doctor has to be using its billing system in order to get the EMR, and doctors are charged a percentage of revenue for both billing and the EMR. The simplicity of the system appealed to some when told about it, but none liked the way they would have to pay for it.
- **eClinicalWorks** – This is a full-fledged system, with hardware, software, and onsite setup and technical support that has started to be sold through Sam’s Club as well as directly to doctors. It is designed for offices with 1-3 doctors only. The cost is \$25,000 for the first doctor, \$10,000 for the second, and \$10,000 for the third. None of the optometrists at Miami Nice had heard of the company, but some found the idea of availability at Sam’s Club interesting.
- **Greenway Medical Technologies** – The company’s *PrimeSuite* got its start in obstetrics, but it now has more than 24,000 healthcare providers on its system from 30 specialties and subspecialties.

Comments included:

- “An EMR is very expensive, and I’m unable to afford it now.”
- “I won’t get an EMR until it is *required*.”
- “I’ll retire before they are required.”
- “I’ll adopt EMRs when they are practical and widely accepted.”
- “Hell will freeze over before I get an EMR. I’ll take cash patients only.”

The situation is only slightly better for e-prescribing. Currently, only 4% (yes, 4%) of these optometrists e-prescribe. Over the next 6-18 months, 32% plan to start e-prescribing.

