



Trends-in-Medicine

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SUMMARY

Toric lens sales are up and average of 8% year-to-year, and the outlook is for sales to increase an average of 6% over the next 12 months. Performance is the key factor in the selection of a toric lens. CooperVision, especially its new Encore toric lens, is the up-and-comer, taking market share at the expense of Bausch & Lomb. Colored contact lens sales are up an average of 6% year-to-year, and the outlook is for sales to increase an average of 3% over the next 12 months. Novartis' CIBA Vision/Wesley Jessen is the top vendor of colored cosmetic lenses, though colored lenses from Ocular Sciences (OSI) and Johnson & Johnson/Vistakon are getting a little more attention. J&J/Vistakon and CooperVision sales reps were ranked the best, with B&L the worst. The opinion of Ciba/WJ sales reps has declined over the past year.

Optometrists keep little or no inventory of toric or colored lenses, depending on trial sets to sell these lenses.

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CONTACT LENS UPDATE

Nineteen optometrists were interviewed from around the country to check on trends in toric and color contact lenses and in the quality of sales representatives from the various vendors. This report reflects their practices, experience and opinions. All market share figures are based on estimates from these doctors, not any official figures.

TORIC LENSES

Performance is the most important factor in the choice of a toric lens, most doctors agreed. After that, price, the availability of trial lenses, handling and samples are critical issues. Other than these five factors, doctors consider a variety of issues important, but generally secondary, including: visual acuity, fit, stability, optics, range of parameters, water content, lid anatomy, patient requests, comfort, consistency, quality, reproducibility, and the sales rep.

- A Wisconsin optometrist said, "The lens has to work, period, in terms of vision, comfort and consistency. The rep is the second issue for me. If the reps come around and service us, then so much the better. The price also needs to be there, and that is third. I don't get many patient requests for a particular type of lens, so patient-demand isn't much of a factor."
- A Michigan doctor said, "Often the completeness of the trial fitting set and the concurrent available lenses to choose from will dictate the first type of lens I choose. Occasionally, this will be mitigated by experience that dictates that a type of lens may not work for the astigmatic patient present. Lens handling, thickness, UV absorption properties and manufacturer's rebate are significant, too."
- A Florida optometrist added, "Key selection criteria are crisp optics, consistent fit, and rotational stability, good comfort, and ease of handling plus availability in a frequent replacement (one-month) or two-week disposable form and a wide range of parameters."
- A West Virginia doctor said, "First is vision, second is stability, third is reproducibility, and fourth is facility of obtaining trial lenses."

Trial lens policies vary from company to company and generally are determined by how many boxes of lenses the practitioner buys. For example, a source said trial lenses are earned this way:

- **J&J/Vistakon:** one box of free regular trial lenses for every 13 boxes of regular lenses purchased.
- **CooperVision:** one free regular trial set for every four revenue boxes of regular lenses, and one free toric trial set for every two revenue boxes of toric lenses.

Comparison of Toric Lenses

Attribute	OSI Sunsoft	B&L Soflens 66	CooperVision			J&J Acuvue
			Preference	Frequency	Encore	
Replacement time	Quarterly	2-weeks	Quarterly	Monthly	2-weeks	2-weeks
Type	Front lathed, Back molded	Molded	Front molded, Back lathed	Front molded, Back lathed	Molded	Molded

Sales reps mentioned other factors they believe influence a doctor's choice of vendor, including:

- **Return policies.** A CooperVision sales rep said her company has a more liberal return policy than J&J, and claimed that has helped sales, "All the vendors except Cooper will not let doctors return a box after they've written the patient's prescription on it. With CooperVision, doctors can write on the box, open it, and use the first blister and still return the box for a full credit."
- **Shipping costs.** OSI used to offer free shipping, but the company reportedly has started charging a small shipping fee.

Doctors estimated that their toric lens use is up an average of 8% compared to a year ago. The outlook is for sales to increase an average of 5% over the next six months, and increase an average of 6% over the next 12 months.

Change in Use of Toric Lenses (according to these doctors)

Past 6 Months	Outlook for next 6 months	Outlook for next 12 months
Up 8%	Up 5%	Up 6%

The Bausch & Lomb's Soflens 66 toric is losing market share, and that trend is likely to continue. Just a year ago, it was the clear market leader, with doctors praising it for stability, affordability and comfort. However, it appears CooperVision is taking market share, and Cooper's new Encore lens is expected to help that company gain even more market share.

Toric Lens Market Share (according to these doctors)

Brand	Toric use in Nov. 2001	Current toric use Nov. 2002	Outlook for toric use Nov. 2003	% Change
Bausch & Lomb	36%	30%	27%	Down 3%
CooperVision	27%	29%	34%	Up 5%
Ciba/WJ	9%	10%	10%	Flat
J&J/Vistakon	0	10%	10%	Flat
Ocular Sciences	21%	15%	13%*	Down 2%
Other	7%	6%	6%	Flat

* Comments about this company were conflicting. While doctors projected OSI market share to decline, they also said OSI's Biomedics is likely to see significant increases in use.

Doctors generally agreed the B&L Soflens 66 is a good toric lens, and some believe it is better than the CooperVision toric lenses. A Florida optometrist said, "My experience with it has been very good. Patients like how it feels, and I like how it fits." Another doctor said, "With the Soflens 66, there is less drying on some patients, and better draping on some patients." A third said, "The Soflens 66 is more comfortable and more stable than the CooperVision lenses." A Michigan optometrist said, "The B&L: lenses are thinner than the CooperVision lenses."

However, many optometrist described the Cooper Encore as a better toric than the Soflens. A Florida doctor said, "The B&L Soflens 66 is a good lens, but not better than the CooperVision Encore. As I have been re-fitting patients, they like the Encore toric better. Patients who cannot wear the Encore, I fit in the Cooper Preference...I despise that the Soflens 66 is so cheap and prevalent in discount stores." Another said, "I like the Cooper lenses better because of their quality and price." A California optometrist said, "CooperVision lenses are more consistent in terms of the quality of materials, designs and reproducibility." A Michigan doctor said, "My partner prefers CooperVision because he finds their stability better."

There were a few criticisms of the CooperVision lenses, though. A Florida optometrist commented, "There is only one base curve option, and it is not available in extended range powers to fit high cyl prescriptions." A Wyoming doctor said, "The biggest problem with Cooper lenses is availability."

It isn't only CooperVision that is threatening B&L. Doctors also are starting to give more attention to new lenses from J&J/Vistakon and Ocular Sciences. Although doctors did not predict their use of lenses from either of these companies would be higher this time next year than it is now, that may underestimate the potential for J&J/Vistakon and OSI because, in answer to another question, eight doctors said they expected Vistakon and/or OSI torics to see usage increase significantly.

In the future, doctors said a good toric could enter the market, but it really does have to be a better lens, they insisted. A Midwest optometrist explained, "Someone has to get booted for me to add something. It is getting less likely, and I have to see the place it fits."

- Five optometrists said they expect OSI's Biomedics toric to get significantly more use. Doctors who've tried it generally said they like it.
- Three optometrists expect use of the J&J/ Vistakon toric to go up. Although J&J is potentially the "400-pound gorilla" in this area, most sources do not believe J&J is making a huge effort in torics; they said they believe J&J is willing to settle for a smaller piece of the pie than it usually does. One reason may be the quality of the J&J lens. Several doctors criticized it, saying it doesn't perform as well as the Cooper or B&L toric lenses.

COLOR CONTACTS

Colored lens sales are up in mid-single digits from a year ago, and sales are expected to continue to increase but by a slightly smaller amount.

Change in Optometric Use of Colored Lenses (according to these doctors)

Past 6 Months	Outlook for next 6 months	Outlook for next 12 months
Up 6%	Up 4%	Up 3%

CIBA Vision/Wesley Jessen is the hands-down winner among colored contact lens vendors, and there isn't even a close second. The key reasons for the popularity of the Ciba/WJ lenses are the range of colors, patient preference, and patient demand for that particular brand. Among the comments doctors offered were:

- "Ciba/WH is my preference because it has the best lenses available, and patients request them."
- "Ciba/WJ has the best combination of clear optics and nice colors."
- "I prescribe a lot of WJ Fresh Look lenses. Recently, I started fitting the J&J Acuvue colors also, but my patients tend to like the color selection that Fresh Look has better than Acuvue."
- "Ciba/WJ has more colors."
- "WJ has the most variety and the highest quality lenses."
- "Ciba/WJ has a good range of colors and a persistent sales rep."
- "I prefer WJ because of patient satisfaction with the colors."
- "My preferred vendor is Ciba/WJ because that's what patients choose."

Yet, J&J and OSI colored lenses are getting some increased attention. A Florida optometrist said, "Vistakon lenses are comfortable and have good optics, but the colors suck. WJ lenses are uncomfortable and have poor optics, but good colors. There really is no good choice in a colored lens as

yet." Another doctor said, "I like Acuvue colored lenses the best. The Cooper lenses are not very 'realistic' compared to the others." A Wisconsin optometrist said, "I prefer the Vistakon lens because it is the same lens – with color. OSI is doing the same thing (using a standard lens and adding color)." A California optometrist added, "Ciba was one of the first with colored lenses, and trial lenses are readily available, but J&J's Acuvue will take more share, though I don't like the 'test' printed on the (trial) lenses, and there is less availability of J&J trial lenses."

In the future, four optometrists predicted J&J/Acuvue colored lenses will see a significant increase in use. Two doctors predicted OSI's Biomedics color lenses would do well.

INVENTORY

Almost no optometrists carry any inventory of either colored or toric contact lenses, and the very few that do reported their levels normal to low. Rather, they depend on trial lenses, so they tend not to use companies that do not have a liberal trial lens policy. A Midwest doctor said, "I don't know anyone who stocks either of these." A Florida optometrist said, "I never keep inventory, only trial lenses, but I have a lot of trials." Another doctor said, "I only keep trials, and my inventory of those is about average."

SALES REPS

Doctors were asked to rank the quality of their contact lens sales reps on a scale of 1-10 (with 10 the best). There were wide variations for each company, but on average, the rankings came out:

6.0 - J&J/Vistakon

5.0 - CooperVision. The company has very good sales reps, and that has remained consistent over the past six months.

- Ⓟ Eleven doctors had positive things to say about CooperVision sales reps. A doctor said, "My Cooper rep is well-trained, and I get good service, but the rep has an annoying personality." A California optometrist said, "We have an excellent rep who has been our rep for years." A Florida doctor said, "Our rep tries hard to fulfill special requests, respects our business and supports us." Another Florida doctor said, "Our rep is nice, and we like the reliability of knowing we can call her, and she will be there for us." A fifth doctor said, "I've increased Cooper volume due to the company's website, ordering, price, quality and fast, free delivery."
- Ⓟ Six doctors said they rarely or never see a Cooper sales rep. A Wisconsin doctor said, "They are almost non-existent in my area." A Kansas doctor said, "I haven't seen a Cooper rep in my office in 10 years."

4.7 - Ocular Sciences. A Kansas doctor said, "It's a phone rep, but pretty good." A Wisconsin doctor said, "My OSI rep is a 10 and was trained by B&L." A Florida doctor said, "I recently saw a rep for the first time."

3.6 - Ciba/WJ. The sales effort has declined over the past six to 12 months, numerous doctors reported. A doctor said, "My rep gives horrible service, does no follow-up, and lies to me. I'm totally fed up with the poor service."

3.5 - B&L. There have been no significant changes in the sales rep effort in the past six months, all but one doctor agreed, and that effort was rated bottom of the barrel. A B&L official admitted there are fewer B&L reps visiting doctors. He said, "We are not trying to see everyone. We are focusing our sales staff where they will do the most goods." He said this doesn't just mean high volume practices but included "growing practices and doctors who want to partner with us."

Ⓟ Eight doctors commented that they rarely or never see a B&L sales rep. A West Virginia doctor quipped, "I didn't know I had one!" A North Dakota doctor said, "The rep no longer calls on me. The rep effort from B&L has evaporated." A Florida doctor said, "The B&L rep is non-existent."

Ⓟ Five described the B&L reps as good. A Kansas doctor said, "They are professional, educated and willing to help the profession in any way." A Michigan doctor said, "My rep is professional and makes every effort to motivate me to use the company's products." A Florida doctor said, "Our rep is a 'good old boy' who keeps his word and treats me well." Another Florida doctor said, "We like our rep and are glad to see him."

Ⓟ Three were critical of the B&L reps, saying the quality has declined. A Wisconsin doctor said, "B&L lost its best reps." A California doctor said, "There's been a lot of turnover." Another said, "My rep is horrible."

MISCELLANEOUS

- ◆ CooperVision reportedly has started doing some private label business.
- ◆ Bausch & Lomb officials are still hopeful they will be able to sell PureVision lens again. A source said, "If we don't win in court, we will wait out the two years and then use the technology rather than pay Ciba."
- ◆ Morale at B&L appears to be good. The company had a huge – and busy – booth at the American Academy of Ophthalmology annual meeting in October 2002, and the sales reps didn't look or sound glum. One said, "We don't have anywhere to go but up. We still have good products, and people shouldn't write us off." Another commented, "We love (CEO Ronald) Zarrella, and he's been good for B&L, so we'll stand behind him. This (the revelation that he does not have the MBA that was listed on his resume) will blow over."