



Trends-in-Medicine

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by Lynne Peterson

Quick Pulse

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EYE CARE UPDATE #2

To check on trends in the eye care field, 47 optometrists, mostly from Florida, were interviewed at the Dade County Optometric Association's Miami Nice Education Symposium in Coral Gables on March 10 and 11, 2007. They offered opinions and outlooks on contact lenses; contact lens solutions; medications for glaucoma, dry eye, and ocular allergies; refractive surgery; and multifocal IOLs.

CONTACT LENSES

Compared to this time last year, doctors estimated that their contact lens fittings are up an average of 6.1%, and over the next 6-12 months they predicted that their contact lens fittings would increase an average of 4.0%. A third of sources also believe that there will be a shift to more use of daily disposable lenses over the next 6-12 months. Comments on daily disposable lenses included:

- "They are comfortable, clear, and easy to use."
- "I believe that they are a healthier modality."
- "There is less chance of infection."
- "New products are available."
- "Prices have come down."

On January 17, 2007, Ciba Vision recalled select lots of its O₂Optix (lotrafilcon B) silicone hydrogel lenses. Ciba's explanation was: "(We) identified that some lenses in these lots may fall below our standard for ion permeability, a material characteristic that correlates with lens movement on the eye...The potential medical safety risk to consumers posed by lenses with reduced ion permeability includes discomfort, foreign body irritation, and superficial localized corneal staining. The possibility of occurrence of these findings is moderate. As with any staining of the corneal tissue, the risk of corneal infection is somewhat increased, although the probability is remote."

Two-thirds of these doctors were aware of the recall, and most have no idea when to expect the lenses to be available again. But the recall doesn't appear to be having much impact on use of Ciba lenses by these doctors. Prior to the recall, doctors estimated that an average of 17% of their patients were fitted with some Ciba Vision lens, and doctors predicted this would decrease just 1%, to an average of 16% of their total contact lens fits over the next six months.

Doctors who are switching patients out of O₂Optix are mostly going to Johnson & Johnson/Vistakon's Acuvue (especially Acuvue Oasys), but Bausch & Lomb is also getting some new business from this. There is a "new and improved" B&L PureVision that doctors (and distributors) believe is a real improvement, and it is helping PureVision sales.

Switching Choices for Ciba Vision O₂Optix Lenses

Lens	Percent of doctors switching from O ₂ Optix to this
Johnson & Johnson/Vistakon's Acuvue, Acuvue Oasys, or Acuvue Advance	69%
Bausch & Lomb's PureVision	16%
Novartis/Ciba Vision's Night & Day or Fresh Look	6%
CooperVision's Proclear	3%
Other	6%

CooperVision is now selling its lenses to 1-800-CONTACTS, and 25% of these doctors plan to decrease their use of CooperVision lenses because of this. CooperVision is leading its sales managers to believe that the silicone hydrogel lenses will be launched in June 2007, with training in May, and a large local distributor has heard the same thing but is dubious that the launch really will occur before September 2007.

Is Alcon getting into contact lenses? A source thinks so. He said Alcon definitely is looking to get into contact lenses and is considering buying either CooperVision or Ciba Vision.

CONTACT LENS SOLUTIONS

Alcon's Opti-Free is the most used and recommended contact lens solution for the vast majority of these doctors, but a few prefer Advanced Medical Optics' (AMO's) Complete or Novartis/Ciba Vision's AQuify. Bausch & Lomb's ReNu is not the preferred contact lens solution for any of these doctors. Asked what contact lens solution they start new patients on, 63% said Alcon's Opti-Free, 25% said AMO's Complete, and 12% said B&L's ReNu.

On March 6, 2007, just a few days before Miami Nice, B&L announced another contact lens solution recall. This time the recall was only a limited number of lots of ReNu MultiPlus lens solution because it contained an elevated level of trace iron that could result in discoloration of the solution and a shortening of its shelf life. This voluntary recall was much smaller than B&L's recall last year of ReNu with Moisture-Loc, and it didn't get much media attention, but most doctors at the meeting were aware of it, and their reaction was mixed – half described it as serious and half did not. More than half (59%) said it would cause their use/recommendation of B&L solutions to go down.

Few (20%) of these doctors believe that there is a higher overall infection rate with B&L contact lens solutions than competing solutions. However, contact lens distributors and sales reps for contact lens companies other than B&L generally agreed that Alcon has the safest lens solution for use with silicone hydrogel lenses and that B&L's solutions are the most problematic. Some contact lens sales reps are actively recommending that doctors use Alcon's solution and discouraging use of ReNu.

In November 2006, AMO also had a recall of certain lots of its Complete MoisturePlus multipurpose contact lens solution. Three lots manufactured at a plant in China were found to have bacterial contamination, which compromised sterility. Eighteen lots manufactured in the same plant and distributed in the U.S. were recalled, even though there were no reports of any adverse health events related to the recalled U.S. solution. The reaction to this recall was somewhat milder than to the B&L recall, with two-thirds of doctors saying their level of concern with the AMO recall was low or non-existent, and only 22% describing their level of concern as high (11% rated their concern "intermediate").

Both recalls appear to be having an impact on the choice of contact lens solution. Most doctors (81%) predicted that their use of B&L's ReNu will go down even further during 2007, and use of AMO will fall slightly as well. The big winner is Alcon's Opti-Free, with 80% of doctors saying they will use more Opti-Free in 2007.

Corneal staining appears to be becoming a bigger issue, and an industry source said use of daily disposable lenses is increasing as a result. Use of silicone hydrogel lenses is decreasing for 25% of these doctors. The issue also has spurred 40% of these doctors to use more of a particular contact lens solution, mostly Alcon's Opti-Free.

Is J&J getting into solutions? Even within J&J, officials are being very tight-lipped. Doctors expect it, but no one had any firm information.

GLAUCOMA

Over the next 6-12 months, doctors predicted their prescriptions for prostaglandin analogs overall would increase an average of 7%, but market share for all three FDA-approved prostaglandins – Pfizer's Xalatan, Allergan's Lumigan, and Alcon's Travatan – appears to be holding relatively steady. The first-line indication for Lumigan will not boost use of Lumigan, two-thirds of doctors predicted.

If the FDA were to approve Allergan's Combigan – the fixed dose combination of Alphagan (brimonidine) and timolol – few optometrists (24%) believe it will expand the percentage of patients on a glaucoma medication. One-third believe it would replace another medication, but no one specific drug.

Sources do not expect any impact on prostaglandin prescriptions due to laser treatments for glaucoma.

Glaucoma Medication Use

Drug	Percent of glaucoma patients taking this medication	
	Now	In 6-12 months
Pfizer's Xalatan (latanoprost)	47.3%	46.1%
Alcon's Travatan (travoprost)	33.1%	33.9%
Allergan's Lumigan (bimatoprost)	16.7%	17.3%
Other	2.9%	2.7%

Neuroprotectives for glaucoma

Only one optometrist reported a patient currently taking oral memantine (Forest Laboratories' Namenda, which is approved for Alzheimer's Disease) *off-label* for glaucoma or age-related macular degeneration (AMD). Allergan is developing memantine for ophthalmic uses. Asked if they *personally* believe that memantine eye drops have efficacy as a neuroprotective in glaucoma, half the doctors commenting said yes, and the other half said no.

The results of an Allergan trial of memantine for neuroprotection in glaucoma are due to be reported soon. If the trial is positive, sources predicted:

- 8.9% of patients will use Forest's Namenda off-label until Allergan's memantine is approved by the FDA.
- 18.3% of patients will be on Allergan's memantine six months after it is approved by the FDA.
- Memantine will be used mostly as an adjunct to drops, not as monotherapy in patients with low intraocular pressure (IOP).
- Patients will take memantine for life.
- Memantine would not cannibalize Alphagan use.

However, doctors were unsure whether managed care would cover memantine, and they were divided on whether they would prescribe or recommend it if it were more expensive than the prostaglandins.

DRY EYE

Currently, these optometrists prescribe Allergan's Restasis (cyclosporine A) to an average of 21.1% of their dry eye patients, and they expect that to increase to 22.1% in six months.

Doctors are split on whether or not Allergan's direct-to-consumer (DTC) advertising has caused patients to ask about Restasis more, but two-thirds of doctors said it has not caused them to prescribe the drug more often. Half had positive comments about the advertising, and half had negative comments about it.

Comments on Allergan's DTC Advertising for Restasis

Positive	Negative
"It brings patients in."	"I don't like DTC advertising...It can create confusion, sometimes hurting the doctor-patient relationship."
"It increases patient questions."	"It is misleading to the public."
"It's okay."	"I don't like them telling the patient, 'Ask your doctor.'"
"It increases patient awareness."	"I don't like it. It makes people think there is a magic bullet for their dry eyes."

Slightly more than half the doctors (57%) said managed care requirements for prior authorization have impacted their prescribing of Restasis. For use of Restasis to increase significantly, these doctors believe the key is pricing, followed by more samples, and better insurance coverage. However, they also recommended that Allergan increase its marketing to doctors and provide more patient education materials.

Comments included:

- "Allergan should advertise to doctors and at (medical) meetings."
- "The company needs to increase its presence and provide samples."
- "Make it effective with once-daily dosing and have a quicker result."
- "Release studies proving liver safety."
- "Indicate who it really works for and how long it takes to work."
- "Lower the price and get it covered by insurance."
- "More insurance coverage is needed."
- "Get it to work quicker and cut the cost."
- "Reduce the cost and put it in a multi-dose container."

OCULAR ALLERGIES

Allergy Medication Use

Allergy medication	Patient use
Alcon's Patanol (olopatadine HCl 0.1% and 0.2%)	68.3%
B&L's Alrex (loteprednol etabonate 0.2%)	7.8%
Allergan/Inspire's Elestat (epinastine HCl 0.05%)	7.0%
B&L's Optivar (azelastine HCl 0.05%)	5.1%
Novartis's Zaditor (ketotifen fumarate 0.025%)	4.2%
Alcon's Emadine (emedastine difumarate 0.05%)	3.8%
Novartis's Livostin (levocabastine 0.05%)	2.6%
Allergan's Acular LS (ketorolac tromethamine 0.4%)	1.2%

Inspire Pharmaceuticals' Elestat (epinastine HCl) was approved by the FDA in 2003 for the prevention of itching associated with allergic conjunctivitis. More than half of these doctors have prescribed it, and they predicted their use of Elestat would remain relatively constant over the next six months. The key competitor for Elestat is Alcon's Patanol.

SALES REPRESENTATIVES

No particular problems were apparent with the sales reps for any of the companies. Not surprisingly, Alcon sales reps ranked highest, far above the nearest competitor. The biggest complaint doctors had about sales reps in general was that

they didn't visit often enough, and this was least with Alcon reps. Vistakon sales reps came in a reasonable No. 2. Ciba Vision and Pfizer reps rated the lowest, mostly because they also have visited these doctors the least recently.

Sales Rep Ratings

Company	Percent rated excellent	Percent rated poor	No rep visits
Alcon	62%	3%	23%
Allergan	33%	6%	31%
B&L	42%	11%	39%
Novartis/Ciba Vision	14%	6%	67%
CooperVision	26%	6%	46%
Pfizer	21%	6%	71%
J&J/Vistakon	45%	5%	32%

ALCON: The comments about the Alcon sales reps were very positive, including:

- “The rep addresses my needs.”
- “The sales rep is always available and very prompt with deliveries.”
- “I get lots of information and samples.”
- “The Alcon rep is informative and doesn't visit too long.”
- “The rep is reliable and consistent.”
- “The sales rep is very personable.”
- “The sales rep is very informed.”

ALLERGAN: There was one complaint that the sales rep “talks too much,” but most comments were positive:

- “The rep has information and samples.”
- “The sale rep is informative and drives to multiple practices.”
- “The sales rep is very informed.”
- “I just met the (new) sales rep.”

BAUSCH & LOMB: The positive comments about B&L sales reps are an improvement over previous years and included descriptors such as “personable” and “helpful.” However, the highest number of poor ratings also went to B&L. Comments included:

- “The sales rep is always on top of everything.”
- “The rep is very informed.”
- “The sales rep is very supportive and informative.”

NOVARTIS/CIBA VISION: Doctors had only one positive comment about the Ciba rep: “He's a great guy.” The big complaint was lack of visits, but one doctor also complained that the Ciba rep is “undependable.”

COOPERVISION: Positive comments about the CooperVision sales reps were offset by a lack of visits. Comments included:

- “The rep calls back!”

- “The sales rep is always available and very prompt with deliveries.”
- “The sales rep is helpful and courteous.”
- “The sales rep tries to help.”
- “The rep is knowledgeable and has availability (of lenses).”

PFIZER: The Pfizer rep was described as “professional” and “very informed” but rarely seen.

VISTAKON: The sales reps were given very good ratings and were described as “personable,” “professional,” and “very informed,” but a lack of visits is a problem, and one doctor complained of a lack of availability of trial lenses. Comments included:

- “The sales rep addresses my needs.”
- “The rep is always available.”
- “The rep consults by telephone.”
- “The sales rep makes an appointment.”

REFRACTIVE SURGERY

For LASIK volume and referrals to increase, these doctors believe the price has to come down – and equalize more. That is, less wide variations in price, which is confusing patients. They also think more advertising and better results are necessary. Comments included:

- “The news media need to stop showing catastrophic results.”
- “Doctors need to have more discussions with patients, display more posters, and give out more materials.”
- “I don't refer for LASIK, and I feel that it should not be done.”
- “More advertising – especially with famous sport figures, etc. – would help.”
- “More predictable results and lower procedure fees are needed.”
- “There has to be a 100% satisfaction rate.”

With this emphasis on price it is a little surprising that 22% of sources said LASIK pricing has increased, 8% said pricing has declined, and 70% said pricing is stable.

LASIK referrals for these doctors in 1Q07 (January-February-March) are down an average of 8.1% compared to 1Q06. Referrals for April and May 2007 are down an average of 1.4% compared to spring 2006. The only explanations doctors offered for the softening in referrals were: lack of patient interest and demand. Comments included:

- “The initial group of patients have had it done.”

- “The number of patients requesting LASIK are down since a large percentage has already had the procedure.”
- “We offer LASIK as an option, along with glasses and contact lenses.”
- “People are not willing to pay the money.”
- “There just isn’t a lot of demand for it.”

Nearly half of these doctors are enthusiastic about presbyopic LASIK, about a third are rather vehemently opposed to it, and the rest have some interest but are not sure it is ready yet for prime time.

MULTIFOCAL IOLS

More than half of these doctors reported an increase in patient interest in multifocal IOLs for either cataract or refractive lens exchange patients, but only 38% are recommending multifocal IOLs to patients considering cataract surgery, and very few are recommending any particular lens, leaving that decision entirely to the surgeon. Among those who are recommending a particular multifocal IOL, half prefer Alcon’s ReStor and half prefer AMO’s ReZoom.



Comments on Presbyopic LASIK

Positive	Neutral	Negative
“There is high interest in a population who can afford it.”	“I’m interested, but I haven’t seen successful results.”	“I have absolutely no interest.”
“It’s good for patients adapted to monovision in soft contact lenses.”	“I’m interested, but is it better than monovision?”	“It doesn’t work better than monovision contact lenses.”
“It’s great for patients accustomed to monovision.”	“I would love to see it improve.”	“It needs improvement. The visual acuity is not good enough, and there is too much glare.”
“This would allow the majority of procedures to be done.”	“Monovision LASIK has a place.”	“It doesn’t work.”
“I’m very interested.”	“It’s another option, just like monovision contact lenses. Personally, I’m fine with glasses.”	