



Trends-in-Medicine

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by Lynne Peterson

SUMMARY

♦ The economy is causing patients to skip appointments, reducing patient flow in optometric offices. Refractive surgery referrals, contact lens fittings, and even glaucoma medication use are all off. Optometrists don't expect the economy to stabilize before spring 2010 and not improve before early 2011. ♦ Cost – and the perception of cost – continues to explain why <10% of contact lens patients wear disposable daily wear soft contact lenses. ♦ Alcon's Opti-Free is the No. 1 contact lens solution recommended, but patients are often buying cheaper solutions or switching to store brands because of cost. ♦ LASIK volume has bottomed or may go down a little more during 2009. Multifocal IOLs are off less, and their outlook is for stability or a slight uptick. ♦ Patients are interested in Allergan's eyelash extender, Latisse, which some doctors expect to be popular with women. ♦ "Huge" numbers of patients are expected to switch to a generic prostaglandin for glaucoma when one is available. Meanwhile, Pfizer's Xalatan is losing a little share to Alcon's Travatan, and Allergan's Combigan is expected to gain a little. ♦ Cost, lack of insurance coverage, and slow onset of action continue to limit use of Allergan's Restasis for dry eye.

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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
TrendsInMedicine@aol.com

EYE CARE UPDATE

To check on trends in the eye care field, 55 optometrists and 2 ophthalmologists from 8 states were interviewed at the Broward County Optometric Association's Gold Coast Educational Retreat in Ft. Lauderdale on January 24 and 25, 2009. They offered their perspective on the economy; their outlook for contact lenses, contact lens solutions, refractive surgery, and a new cosmetic product; and trends in glaucoma and dry eye medications.

ECONOMY

In the current economic downturn, optometrists estimated that, on average, their overall patient volume has dropped 11% over the past 4 months, with contact lens fittings off 5% and glaucoma medication prescriptions down 3%. In this environment, two-thirds of the doctors said patients are going longer between visits for regular eye exams. However, only a third of glaucoma patients are stretching the time between checkups, though they said patients often don't notice when they skip a glaucoma prescription.

Economic Outlook

Issue	Up	Down	Flat	Overall
Patient volume	5 doctors	26 doctors	16 doctors	Down 11%
Contact lens fittings	14 doctors	1 doctor	30 doctors	Down 5%
Glaucoma medications	6 doctors	1 doctor	32 doctors	Down 3%

These doctors expect the economy to stabilize in an average of 15.7 months but not start improving for 23.6 months. So far, the biggest impact on doctors personally or on their practice from the economic downturn has been a decrease in refractive surgery, fewer patients in the office, patients spending less, especially on spectacles, and a drop in investment portfolios. An ophthalmologist said, "It is dreaming to think the economy will turn around this year. When it does turn around, it will be a different market – more stable and in a narrower range."

Interest in refractive surgery is down.

- "LASIK and other refractive surgery are off substantially (~45%)."
- "People are less likely to have an elective surgery."
- "Patients uncertain about the economy don't want to spend \$5,000 on an elective procedure."
- "LASIK is down and so are multifocal IOLs (mIOLs), but mIOLs are off less than LASIK."

Patients are coming in less often and are less willing to spend money.

- “Patients are just not coming in.”
- “Patients are missing appointments and not changing their glasses.”
- “There is less renewal of contact lenses.”
- “There is more uncertainty. I’m less likely to make purchases of equipment, and patients are extending follow-up intervals.”
- “Patients are demanding increased (exam) time, and I’m having more wasted time.”
- “Patients are more cost conscious.”
- “There are more no shows.”
- “I’m seeing a larger percentage of insurance reimbursement and a lower percentage of cash pay.”
- “There are fewer patients overall, especially those without insurance.”

Spectacle sales have been especially hard hit.

- “A decrease in new frame purchases has caused most of our losses.”
- “Patients are less likely to get new glasses.”
- “Spectacle sales have been reduced.”
- “People are buying cheaper eyeglass frames.”
- “Patients are saving money on glasses and will not go outside their insurance benefit.”
- “Fewer patients are getting glasses.”
- “The purchase of premium products and a second pair of glasses is less frequent.”

Personal investments have been hit hard, but that was not the major concern of these doctors.

- “My retirement savings have decreased.”
- “My nest egg investments have decreased.”

Some doctors are working longer hours for less money, and others, without their own practices, are having their schedules cut.

- “I used to work six days per week but was cut back by two days.”
- “I’m working more hours.”
- “I’m working fewer hours and getting less pay.”
- “My revenue per patient is down.”
- “There is added stress. We do help out those who are up front about their situation.”

In an effort to retain patients in this environment, doctors are trying a variety of things from offering financing to extending hours, boosting advertising, and lowering prices. They are:

- Opening **additional hours** on Saturday or at night and emphasizing **quality patient care**.
 - “I send thank you cards for patient referrals, and I thank patients for coming in.”
 - “I’m making myself available 24 hours and spending more time with patients.”
 - “I stress the value of services during patient visits.”
 - “We do the best job and give the best service we possibly can.”
 - “I encourage patients not to let finances interfere with their care, and I may offer alternate options. I also reassure normal patients that longer exam intervals may be okay.”
- **Lowering prices** and offering specials and sales.
 - “We lowered our prices, and we advertise contact lens exam specials.”
 - “We offer specials on glasses (i.e., two for \$99, or buy one, get the second frame free).”
 - “We are doing more in-office sales on frames.”
 - “I’ve added a value line of frames/lens combinations, and I’ve increased internal marketing and recall efforts.”
- **Changing business practices** such as increasing the number of insurance provider panels in which they participate; bundling costs for eyeglasses, vision care, and contact lenses; and placing volume purchases of contact lenses to take advantage of rebates; and offering financing – e.g., 24-month no-interest credit.
- **Advertising and marketing** more, including to other professionals.
 - “I’m trying to increase the conversion rate of multifocal lenses.”
 - “I’m personally recalling previous patients myself.”
 - “I’m sending more recall cards, making more phone calls (to patients), and mailing more flyers.”

CONTACT LENSES

On average, 22% of these doctors’ contact lens patients are in disposable daily wear soft contact lenses. However, this estimate is skewed by three doctors who have 90%+ of their patients in disposable daily wear soft contact lenses. Without those outliers, an average of 9% of patients are in disposable daily wear soft contact lenses, which is in line with what distributors and sales reps estimated.

Cost is the major reason that more patients don't use disposable daily wear lenses, but patient fear of putting something in their eyes, dry eye, concerns about wastefulness, lack of doctor promotion, and prescription limitations are also factors. A contact lens sales rep commented, "There is a perception that they cost more, but that perception is changing, and I anticipate growth this year." A distributor noted, "In Europe and Asia, 80%-90% of contact lenses are disposable daily wear. It is a different mentality and a healthier modality. Use will grow in the U.S. because all the manufacturers now have them, so the sales reps are promoting them more." A doctor added, "Patients like extended wear lenses, but I try very hard to talk them into daily wear."

The specific contact lens most often prescribed or fit by these doctors is hands-down Johnson & Johnson/Vistakon's Acuvue, with Novartis/Ciba Vision lenses No. 2. Between them, J&J and Ciba Vision are the preferred lens for 80% of these doctors. For 77% of doctors the No. 1 lens is unchanged from a year ago. There was no pattern to those who switched primary lens provider. Over the next 6-12 months, doctors do **not** expect to change their primary contact lens.

Acuvue is also currently the preferred silicone hydrogel (SiH) lens for 56% of these doctors, again with Ciba Vision SiHs in second place. This is the same as last year. Nearly all the doctors (89%) expect Acuvue to remain their preferred SiH lens.

Preferred Contact Lenses

Company	Preferred
Overall lenses	
J&J/Vistakon	49%
Ciba Vision	31%
CooperVision	10%
Bausch & Lomb	8%
Other	2%
Silicone hydrogel lenses	
J&J/Vistakon's Acuvue Oasys and Advance	56%
Ciba Vision's Focus, O ₂ Optix, and AirOptix	24%
B&L's PureVision	9%
CooperVision's Biofinity and Avaira	11%

Contact lens samples/trial sets are generally not a problem, though 4 doctors complained of problems getting trial sets from Bausch & Lomb, 4 have had problems getting trial sets from Vistakon, 3 from Ciba Vision, and 2 from CooperVision.

The other trend appears to be patients buying smaller quantities of contact lenses at one time. A sales rep said, "We are seeing patients buying only 1-2 boxes of lenses, not an annual supply." A distributor agreed, "Patients are buying fewer boxes, and practitioners are inventorying less. If doctors don't have the lenses, then patients will shop elsewhere. Non-

compliance also is up; patients are wearing their lenses longer, which is very threatening to their eye health."

CONTACT LENS SOLUTIONS

Most often, these doctors currently recommend Alcon's Opti-Free. They said the economic slowdown has caused 20% of patients to opt for cheaper solutions and 35% to switch to store brands, but the economy has had no impact on contact lens solutions for the remaining 45% of patients. A contact lens sales rep said, "We give starter kits and hope patients will go to retail and buy our product, but often patients will switch at the store to a private label (store brand)."

Recommended Contact Lens Solution

Company/product	Preferred solution
Alcon's Opti-Free	72%
Advanced Medical Optics' Complete	14%
Novartis/Ciba Vision's ClearCare	10%
Bausch & Lomb's ReNu	4%

In 2006, Bausch & Lomb's ReNu with MoistureLoc contact lens solution was recalled worldwide when it was linked to an outbreak of *Fusarium* keratitis, and then in 2007 Advanced Medical Optics (AMO) was forced to recall its Complete MoisturePlus Multiple Purpose contact lens solution after the Centers for Disease Control and Prevention (CDC) linked it to an increase in *Acanthamoeba* keratitis. However, doctors almost unanimously agreed that there are no new patient safety concerns about contact lens solutions – except to remind patients that they have to rub contact lenses to clean them.

REFRACTIVE SURGERY

Compared to January 2008, optometric LASIK/refractive **referrals** are down an average of 12%. In the past four months, optometrists estimated that LASIK pricing dropped an average of 2%. Comments included:

- "My primary refractive surgeon has changed his practice situation, and (that changed) the co-management arrangement and how the patients are being taken care of."
- "Prices have gone down."
- "There is less patient interest."
- "There is a lack of money by patients for this surgery."
- "Patients are postponing procedures."
- "Patients are waiting longer."

Refractive Surgery Outlook

LASIK/refractive referrals	Up	Down	Unchanged	Overall
Year-to-year	4 doctors	15 doctors	26 doctors	Down 12%
Outlook rest of 2009	3 doctors	14 doctors	31 doctors	Down slightly

Over the rest of 2009, these optometrists expect their refractive referrals – whether LASIK or other procedures – to remain relatively stable or decline slightly. Those who expect further deterioration predicted that referrals would bottom out within 2 years. A handful of doctors said they expect a slight uptick in referrals for Bausch & Lomb/eyeonics' Crystalens, for multifocal IOLs, for cataract surgery, or for refractive lens exchange.

Asked if there is any refractive technology that has an advantage at this point and in this economic environment, most doctors said no, but a few noted that PRK may have an advantage because it is cheaper, and mIOLs may not be hit as hard as other lens/procedures.

Most optometrists do not refer to a particular refractive surgeon based on the surgeon's choice of laser, but some prefer to send patients to surgeons using a femtosecond laser, especially an AMO Intralase.

A NEW COSMETIC PRODUCT

Allergan's Lumigan (bimatoprost) is well known to eye care doctors as a glaucoma medication, but a new formulation of Lumigan, called Latisse, was approved by the FDA in December 2008 to cosmetically increase eyelash length. Allergan launched Latisse in February 2009 – after the Gold Coast meeting – but two-thirds of optometrists were already aware of the product, and a few said patients have been asking about it. Most (73%) said they would prescribe it if allowed to do so. Doctors estimated that an average of 9% of their patients would be interested in trying Latisse. One commented, "A lot of patients are asking about it. I'll prescribe it, and probably 50% of women will be interested in it."

GLAUCOMA

Optometrists are not really excited about any new glaucoma medications on the horizon. However, a glaucoma expert pointed to three areas worth watching:

1. **Latrunculin** – an actin cytoskeleton inhibitor derived from a marine sponge. It works by reducing the resistance of the trabecular meshwork to fluid flow, thereby reducing intraocular pressure (IOP). Inspire's INS-115644 is in Phase I testing, and there may be others.
2. **Rho kinase inhibitors** – an enzyme that phosphorylates cytoskeletal regulatory proteins. This lowers IOP by disrupting the actin cytoskeleton of the trabecular meshwork. Among rho kinase inhibitors in development are:
 - Santen Pharmaceutical/Ube Industries DE-104. A Phase II study has been completed.
 - Novartis/Mitsubishi Pharma/Senju Pharmaceuticals' SNJ-1656. Phase I results have been reported.

- Kowa Pharmaceutical Co.'s K-115. It is now in Phase II.
- Inspire's INS-117548. A Phase I dose-ranging study began in October 2008.

3. **Rho-associated coiled coil-forming protein kinase (ROCK) inhibitors.** These are in early development and include Mitsubishi/Senju's Y-27362 and Y-39983.

With respect to specific products already on the U.S. market:

- **ALLERGAN's Alphagan P** 0.1% (brimonidine) and Alphagan P 0.15% were described as essentially interchangeable.
- When **PFIZER's Xalatan** (latanoprost) and **ALCON's Travatan** (travoprost) are available as generics, doctors estimated that an average of 63% of their glaucoma patients would switch from a brand-name drug to a generic for cost reasons. Comments included:
 - "It is better to switch than have non-compliance."
 - "Given the economy, it is what most patients want."
 - "There is patient demand for generic glaucoma medications."
- **Generic latanoprost** would have a "huge" impact on the glaucoma market when it is available. One expert said, "We get a lot of complaints about the cost of glaucoma medications."
- Two-thirds of doctors would feel comfortable switching a patient from **ALCON's Travatan Z** to generic travoprost. A glaucoma expert said, "I would try generic travoprost, and if there is a problem, go back to Travatan Z." Another expert said, "It is tough because timolol generics didn't work. If efficacy is equal, then 50% of my patients would get travoprost, but if a patient had dry eye, I wouldn't give the generic." Another doctor said, "I would stay with Travatan Z because I like the lack of a preservative in that."
- Ten doctors said formularies have dropped **Xalatan** recently, while three said formularies have added it. The others reported no formulary changes with respect to Xalatan. Most doctors have not seen any significant change in rebates offered for Xalatan recently, but three reported more rebates, and seven said there have been fewer rebates. One doctor added that Xalatan co-pays have been increased.
- **ALLERGAN's Combigan** (brimonidine + timolol) is most often prescribed second-line, but more than half prescribe it first-line. Doctors who prescribe Combigan first-line estimated that an average of 31% of their Combigan patients take it first-line. Formulary coverage of Combigan appears to be fairly good, with 29% of doctors saying most formularies cover it, 42% saying it is on some formularies, and only 29% saying it is rarely covered.

- A third of optometrists questioned said there are issues with irritation and hyperemia with **generic versions of MERCK's Cosopt** (dorzolamide + timolol). However, half the doctors said the availability of a generic combination has boosted use of the combination product, but that phenomenon appears to be over, with doctors seeing Combigan gaining at Cosopt's expense going forward. An expert said, "We've started to see patients coming in and saying the generic burns more than the brand." Another expert commented, "A lot of patients are going back to the brand because of the hyperemia."

Over the next year, doctors expect use of Xalatan and Cosopt (brand or generic) to drop slightly, with Travatan and Combigan both gaining a little market share. An expert said, "Pfizer doesn't market Xalatan as much any more. The Travatan drop is smaller, and that is important."

Glaucoma Medication Use by These Doctors

Company/drug	January 2009	January 2010	Change
Allergan's Lumigan (bimatoprost)	11%	11%	Flat
Pfizer's Xalatan (latanoprost)	27%	24%	Down 3%
Alcon's Travatan (travoprost)	36%	38%	Up 2%
Beta blocker only	9%	8%	Down 1%
Merck's Cosopt – brand or generic	9%	8%	Down 1%
Allergan's Combigan	6%	9%	Up 3%
Other	2%	2%	Flat

DRY EYE

Two-thirds of these optometrists recommend or dispense **Allergan's Optive Sensitive**, lubricant eye drops for dry eye. However, they said that, for the most part, Optive does not impact use of other dry eye products. Most doctors had a fairly positive opinion about Optive, though some said they have not yet been detailed on it, so they haven't used it. One commented, "I've dispensed samples, but I haven't gotten that much feedback yet."

Allergan's Restasis (cyclosporine A) is the big gun for dry eye treatment. On average, doctors estimated that 8.5% of their patients were on Restasis 6 months ago, 8.9% are on it now, and 10.5% are likely to be on it in 6-12 months. The most common prescription is for 1 month (two trays or 64 vials), with 11 refills, but how the prescription is written varies widely from doctor to doctor.

Restasis Use

6 months ago	Now	Expected in 6-12 months
8.5%	8.9%	10.5%

However, doctors attending this same meeting last year said their Restasis use was higher: an average of 14%, which was expected to increase to 16% by this year. While the doctors at the meeting this year are not the same, it is interesting that their use of Restasis is lower and expected to grow to a level that still will not match use by doctors last year.

Doctors agreed that cost is the major reason why more patients aren't on Restasis, though lack of insurance coverage, the slow speed of action, a burning sensation, efficacy, and compliance issues also were mentioned. Among the comments on Restasis were:

- "I try a simpler, cheaper treatment first. Some patients have been intolerant of Restasis."
- "I am reluctant to use a medication over a lubricant with no medication."
- "I didn't find it any better than over-the-counter (OTC) products."
- "I think (Alcon's) Systane Ultra OTC is just as good."
- "Patients don't want to be on a drug forever."
- "It's not cost friendly, patient friendly, or time friendly, it is useless."
- "Burning is a minimal complaint and easily dealt with."