A survey on the eye care market shows areas of agreement and some sharp differences among ophthalmologists, optometrists, and managed care executives.

The Eye Care Trend Report, 2013 Edition (sponsored by Allergan) relies on surveys of 63 ophthalmologists, 63 optometrists, and 89 managed care executives, as well as interviews with industry experts.

Survey responses from ophthalmologists and optometrists were similar. The perspective of managed care executives, however, differed from those of the two practitioner groups on key issues. These included: whether brand-name and generic drugs are fully equivalent, the clinical significance of inactive ingredients in eye-drop products, and efforts needed to improve patient adherence to treatment regimens.

Ophthalmologists and optometrists agree that eye care practitioners know when it is in the best interest of patients to prescribe a brand-name drug versus a generic drug, with average ratings of 4.0 and 4.3, respectively, out of 5 (where 1 = strongly disagree and 5 = strongly agree). Managed care executives are neutral, with an average rating of 2.9.

More managed care executives than eye care practitioners agreed with the statement that nonactive ingredients in eye drops make no difference in the effect and tolerability of such products. The average rating given by managed care executives was 3.6, compared with 1.7 out of 5 for both ophthalmologists and optometrists.

Patient adherence to prescribed treatment regimens remains a significant concern for most ophthalmologists and optometrists. Eighty-seven percent of ophthalmologists and 89% of optometrists say it is very important to know whether patients are following treatment regimens. Optometrists cite “ease of dosing” as the leading factor influencing adherence to eye-drop regimens (Figure 1).

However, not much effort is made to coordinate managed care and practitioner efforts to improve adherence. Just 19% of managed care executives report monitoring patients’ adherence to eye care treatment regimens (Figure 2). Among practitioners, 83% of optometrists and 70% of ophthalmologists say they do not receive adherence data from health plans with which they contract. In a sign of how important practitioners regard patient adherence, 88% of optometrists and 67% of ophthalmologists say they would take action to improve adherence without additional reimbursement.

Other major report findings include:

- Managed care executives say that 40% of vision screenings are conducted by ophthalmologists, 35% by optometrists, and 19% by primary care physicians (Figure 3). Managed care executives project that the proportion of vision screenings done by optometrists will grow fastest.
- More than half (52%) of ophthalmologists surveyed expect to see a shortage of ophthalmologists over the next decade, compared with a third of managed care executives.
- Optometrists are expected to become the “primary care providers” of eye care, according to 43% of managed care executives.
- Eye care is more of a concern for the Medicare population than for other populations covered, say 62% of managed care executives.
- Medicare beneficiaries make up the largest proportion (45%) of ophthalmologists’ patient visits, followed by

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patients covered by commercial insurance, 28%; Medicaid, 10%; vision care plans, 9%; and self-pay, 8%.

• For patient visits to ophthalmologists, Medicare accounts for 28%, followed by commercial insurance, 26%; vision care plans, 20%; Medicaid, 15%; and self-pay, 10%.

• Of patient support programs provided by pharmaceutical manufacturers, ophthalmologists rate insurance copay assistance programs as offering the greatest value to patients (Figure 4).

• Both groups of eye care practitioners are embracing electronic medical records. E-prescribing systems are in place at 71% of ophthalmology practices and 70% of optometry practices that responded to the survey. Formulary benefit information was the top feature desired in an e-prescribing system by optometrists (Figure 5) and tied for first place (with adherence data and medication histories) among ophthalmologists.

• More than half of all three groups surveyed (63% of optometrists, 61% of ophthalmologists, and 57% of managed care executives) expect patient volume to increase with implementation of the Patient Protection and Affordable Care Act.

• MCOs executives expect their focus on eye care to grow. While 11% currently pay a great deal of attention to the eye care category, 20% expect to pay a great deal of attention to that category in the future (Figure 6).

Although utilization and costs in the eye care category are less tightly managed compared with other therapeutic categories, the two practitioner groups note the restrictions placed on their prescribing. All or most commercial insurers have formulary restrictions, say 84% of optometrists and 92% of ophthalmologists. Formulary restrictions are placed most often on glaucoma treatments.