

Alcon Open Payments Report 2025

Executive Summary

This analysis examines financial relationships between Alcon Inc., the world's largest eye care device company, and 47,511 healthcare providers from 2020 to 2024. The investigation identifies patterns regarding Alcon's engagement with clinical decision-makers in ophthalmology and optometry.

Alcon's engagement with eye care providers represents a focused strategy. The analysis documents \$78.95 million in direct payments to healthcare providers, with 97.0% concentrated within ophthalmology and optometry professionals. This specialized approach, distinct from diversified pharmaceutical manufacturers, warrants examination of market concentration and potential influence on treatment decisions.

Key Observations

1. **Market Penetration:** With approximately 45,000 ophthalmologists and 37,000 optometrists practicing in the United States, Alcon's reach to 47,511 providers indicates substantial coverage of the eye care market. This engagement level suggests industry relationships are widespread within the specialty.
2. **Return on Investment:** The analysis shows Alcon achieves returns of 619x per dollar invested in certain provider segments, with smaller payments (\$1-100) correlating with higher prescription volumes relative to payment size. This pattern suggests that smaller financial relationships may impact prescribing patterns.
3. **Dual Engagement Strategy:** Alcon employs two distinct approaches: high-frequency, low-value touchpoints (349,017 food and beverage payments averaging \$39) and high-value relationships (178 royalty payments averaging \$112,946). This segmentation differentiates between routine engagement activities and innovation partnerships.
4. **Prescription Market Share:** Though primarily a medical device company, Alcon products generate \$2.91 billion in prescription payments, representing 46% market share in the glaucoma category. This pharmaceutical presence, combined with device market position, creates multiple touchpoints across patient care.

1. Open Payments Overview

Financial Relationships Overview

Alcon has established financial relationships within the eye care provider community, with a network spanning major ophthalmic practices in the United States.

During the five-year analysis period, Alcon entities conducted 378,790 financial transactions with healthcare providers, reflecting an engagement strategy specific to eye care.

Overall Metrics (2020-2024)

- **Unique Providers Receiving Payments:** 47,511
- **Total Transactions:** 378,790
- **Total Payments:** \$78,945,454
- **Average Payment per Provider:** \$1,662
- **Median Payment:** \$21.77
- **Maximum Single Payment:** \$5,659,600

Temporal Evolution of Financial Relationships

Year	Providers	Payments	Total Amount	Avg Payment	YoY Growth
2020	14,994	35,576	\$9.31M	\$261.74	Baseline
2021	21,287	64,179	\$12.71M	\$198.11	+36.5%
2022	27,198	88,566	\$21.39M	\$241.54	+68.3%
2023	28,369	95,324	\$15.33M	\$160.83	-28.3%
2024	28,335	95,145	\$20.20M	\$212.34	+31.8%

Key Finding: The 89% increase in provider count from 14,994 to 28,335 indicates network expansion. The variation in payment amounts despite consistent provider growth suggests changes in engagement approaches.

Payment Category Analysis

The distribution of payment categories reveals sophisticated engagement strategies specifically calibrated for the eye care market:

Category	Payments	Providers	Total Amount	Avg Payment
Royalty or License	178	17	\$20.10M	\$112,946.39
Consulting Fee	9,463	774	\$19.66M	\$2,077.40
Food and Beverage	349,017	47,204	\$13.61M	\$39.01
Acquisitions	25	22	\$11.54M	\$461,591.51
Compensation for Services	5,132	1,419	\$6.05M	\$1,178.42
Travel and Lodging	14,476	2,535	\$4.15M	\$286.46
Grant	146	17	\$2.86M	\$19,613.48
Gift	30	12	\$508.4K	\$16,947.21

Key Observations: 1. **Royalty payments** (\$20.1M) to 17 providers establish ongoing financial relationships 2. **Food and beverage** interactions (349,017

touchpoints) maintain regular provider contact 3. **Acquisitions** (\$11.5M) reflect investment in innovation and technology

2. Prescription Patterns Analysis

Pharmaceutical Market Presence

Though primarily a medical device company, Alcon maintains a presence in the ophthalmic pharmaceutical market. The analysis shows:

Overall Prescribing Metrics (2020-2024)

- **Unique Prescribers:** 453,924 providers prescribing Alcon products
- **Total Prescriptions:** 15,078,321
- **Total Prescription Payments:** \$2,908,981,334
- **Unique Alcon Products:** 69
- **Average Cost per Prescription:** \$192.92
- **Total Patients Treated:** 12,332,860

Market Evolution

The temporal analysis shows market trends:

Year	Prescription Payments	Prescriptions	YoY Growth	Prescribers
2020	\$855,782,088	4,718,722	Baseline	291,324
2021	\$639,339,782	3,292,995	-25.3%	253,892
2022	\$553,561,089	2,707,326	-13.4%	221,445
2023	\$508,702,376	2,406,972	-8.1%	198,234
2024	\$351,595,999	1,952,306	-30.9%	167,432

Key Finding: The 59% decline in prescription value from 2020 to 2024, contrasted with the 117% increase in Open Payments spending over the same period, indicates diverging trends between payment activity and prescription outcomes.

Top Alcon Prescription Products

Product	Total Payments	Prescribers	Market Position
COMBIGAN	\$786,743,133	67,953	Glaucoma combination leader
CIPRODEX	\$420,393,223	248,461	Otic antibiotic dominant
RHOPRESSA	\$386,974,030	28,343	Novel mechanism glaucoma
ROCKLATAN	\$333,283,257	23,649	Premium combination therapy
SIMBRINZA	\$179,126,584	35,571	Established IOP reduction

Product	Total Payments	Prescribers	Market Position
AZOPT	\$145,844,183	24,609	Carbonic anhydrase inhibitor
TRAVATAN Z	\$118,428,013	31,817	Prostaglandin analog
DUREZOL	\$94,096,474	28,959	Post-op inflammation
PAZEO	\$83,416,285	43,084	Allergy treatment
ILEVRO	\$81,896,901	11,866	NSAIDs for surgery

Specialty Prescribing Distribution

Specialty	Prescribers	Total Rx Value	Avg per Provider	% of Total
Ophthalmology	18,028	\$1,742,978,967	\$96,684	59.9%
General Practice	30,970	\$928,216,647	\$29,974	31.9%
Internal Medicine	77,534	\$723,925,920	\$9,339	24.9%
Optometry	33,124	\$512,162,716	\$15,461	17.6%
Ophthalmology - Glaucoma	519	\$160,521,644	\$309,309	5.5%

Glaucoma Market Analysis

Alcon commands significant market share in the glaucoma pharmaceutical category: - **Alcon Glaucoma Products:** \$1,950,399,200 (46.0% market share) - **All Competitors Combined:** \$2,293,461,224 (54.0% market share) - **Total Glaucoma Market:** \$4,243,860,424

This market position in the glaucoma therapeutic area represents significant market presence.

3. Payment-Prescription Correlations

Payment-Prescription Correlation Analysis

The analysis examines correlations between Alcon payments and prescribing patterns. The 180-day window methodology identifies temporal relationships between payment receipt and subsequent prescribing activity.

Key Product Correlations **ROCKLATAN - Premium Glaucoma Combination Therapy - Providers with payment-prescription correlation:** 4,559 - **Payment-prescription pairs within 180 days:** 28,847 - **Total correlated payments:** \$1,842,378 - **Total correlated prescriptions value:**

\$142,893,234 - **Correlation coefficient:** 0.046 - **Average days to prescription after payment:** 87 days - **Providers prescribing without payments:** 19,090

The ROCKLATAN analysis shows that providers receiving product-specific payments demonstrate changes in prescribing within 180 days. The correlation coefficient of 0.046 across 4,559 providers indicates a consistent pattern.

RHOPRESSA - Novel Rho Kinase Inhibitor - Providers with correlation: 1,521 - **Payment-prescription pairs:** 9,234 - **Correlation coefficient:** 0.025 - **Providers prescribing without payments:** 26,822 (94.6%)

SIMBRINZA - Fixed Combination IOP Therapy - Providers with correlation: 2,952 - **Correlation coefficient:** -0.002 (negative correlation) - **Interpretation:** Potential market saturation or ineffective payment strategy

Payment Tier Analysis

The analysis reveals an inverse relationship between payment size and return on investment:

Payment Tier	Providers	Avg Rx Value/Provider	ROI	Interpretation
\$1-100	17,890	\$26,903	619.9x	Reciprocity trigger
\$101-500	20,995	\$40,564	173.0x	Relationship building
\$501-1,000	4,551	\$65,293	94.6x	Sustained engagement
\$1,001-5,000	3,508	\$79,814	44.3x	Significant partnership
\$5,001-10,000	221	\$161,573	23.4x	Advisory level
\$10,000+	468	\$172,815	1.6x	Innovation partner

Key Finding: The 619.9x ROI on payments under \$100 indicates that smaller financial relationships correlate with prescription activity. These payments—typically meals or modest honoraria—correlate with average prescription values of \$26,903 per provider.

Multi-Year Engagement Impact

Sustained payment relationships show compounding influence:

Years Receiving Payments	Providers	Avg Total Payments	Avg Rx Value	Rx Increase vs 1-Year
1 year	15,959	\$566	\$34,539	Baseline
2 years	10,356	\$353	\$40,481	+17.2%
3 years	8,683	\$686	\$68,323	+97.9%
4 years	6,733	\$1,078	\$70,392	+103.9%
5 years	5,928	\$7,215	\$84,932	+145.9%

Key Insight: Providers with 5-year continuous payment relationships demonstrate 145.9% higher prescription values compared to single-year recipients, suggesting cumulative influence effects.

4. Provider Type and Specialty Analysis

Payment Distribution by Provider Credential

Alcon's payment distribution varies by provider credential type:

Provider Type	Recipients	Total Payments	Avg Payment	% of Total
Ophthalmologists (MD)	14,763	\$58.64M	\$3,972	74.3%
Optometrists (OD)	32,231	\$17.91M	\$556	22.7%
Other Physicians	626	\$2.38M	\$3,802	3.0%
Physician Assistants	324	\$30.9K	\$95	0.04%
Nurse Practitioners	187	\$12.4K	\$66	0.02%

Key Observation: The 3.3:1 payment value ratio between ophthalmologists and optometrists, despite optometrists outnumbering ophthalmologists 2:1 among recipients, corresponds with the surgical procedures performed by ophthalmologists.

Top Specialties by Payment Concentration

Specialty	Providers	Total Payments	Avg per Provider
Ophthalmology	13,838	\$52.17M	\$3,771
Optometry	32,231	\$17.91M	\$556
Ophthalmology - Retina	892	\$6.43M	\$7,209

Specialty	Providers	Total Payments	Avg per Provider
Ophthalmology - Glaucoma	234	\$1.87M	\$7,991
Internal Medicine	426	\$342K	\$803

5. High-Value Provider Relationships

Elite Tier: Continuous Five-Year Recipients

Analysis identifies 500 providers receiving payments in all five years (2020-2024):

Provider	Specialty	Total Received	Annual Average
KEZIRIAN, GUY	Ophthalmology	\$7.66M	\$1.53M
RYAN, EDWIN	Ophthalmology	\$6.32M	\$1.26M
LOBANOFF, MARK	Ophthalmology	\$5.64M	\$1.13M
CHARLES, STEVE	Retina Specialist	\$3.96M	\$792K
EIPPERT, GREGORY	Ophthalmology	\$769,856	\$154K

These sustained high-value relationships represent key opinion leaders whose influence extends through: - Publications and clinical guidelines - Conference presentations and education - Peer network influence - Trainee mentorship

Payment Concentration Analysis

The distribution follows a strong Pareto pattern:

Provider Tier	Count	Total Payments	% of Total	Cumulative %
Top 10	10	\$33.78M	42.8%	42.8%
Top 11-50	40	\$9.71M	12.3%	55.1%
Top 51-100	50	\$5.79M	7.3%	62.4%
Top 101-500	400	\$12.90M	16.3%	78.8%
Top 501-1000	500	\$2.52M	3.2%	82.0%
Beyond 1000	46,511	\$14.25M	18.0%	100.0%

Key Finding: The top 100 providers (0.2% of recipients) receive \$49.28M (62.4% of total payments), indicating concentrated payment distribution.

6. Compliance Considerations and Risk Assessment

Payment Categories by Risk Level

The analysis categorizes payments by compliance risk level:

Category	Average Payment	Total Amount	Risk Level	Concern
Royalty/License	\$112,946	\$20.10M	Very High	Ongoing financial dependency
Acquisitions	\$461,592	\$11.54M	Very High	Business entanglement
Grant	\$19,613	\$2.86M	High	Research influence
Gift	\$16,947	\$508K	High	Direct personal benefit
Consulting	\$2,077	\$19.66M	Moderate	Professional services blur

Market Concentration Risks

1. **Provider Concentration:** Top 0.2% of recipients control 62.4% of payment value
2. **Specialty Capture:** 97.0% of payments flow to ophthalmology/optometry
3. **Product Concentration:** Single products (HYDRUS, ROCKLATAN) dominate categories
4. **Geographic Clustering:** Major metropolitan areas receive disproportionate payments

7. Key Findings and Implications

Principal Findings

1. **Market Coverage**
 - 47,511 providers engaged in a specialty with ~82,000 practitioners
 - Extensive coverage indicates widespread industry engagement
 - Payment relationships are common within the specialty
2. **ROI Patterns**
 - Smaller payments (\$1-100) correlate with 619.9x returns
 - Larger payments show diminishing returns (1.6x for >\$10,000)
 - Pattern indicates different effectiveness at various payment levels

3. Market Trends

- 59% decline in prescription value (2020-2024)
- 117% increase in payment spending same period
- Diverging trends between payment activity and prescription outcomes

4. Multi-Year Relationships

- 5-year recipients show 145.9% higher prescribing than 1-year
- Sustained relationships correlate with increased prescribing
- Long-term engagement patterns persist over time

Recommendations for Healthcare Systems

1. Enhanced Disclosure Requirements

- Eliminate de minimis thresholds given 619.9x ROI on minimal payments
- Require disclosure of all industry interactions regardless of value
- Include cumulative payment tracking over time

2. Specialty-Specific Oversight

- Implement targeted compliance programs for ophthalmology/optometry
- Monitor prescribing pattern changes following payment receipt
- Review device selection processes for conflict of interest

3. Formulary Independence

- Exclude providers with Alcon relationships from P&T committees
- Implement cooling-off periods after payment receipt
- Require independent review of ophthalmic product additions

4. Patient Transparency

- Disclose provider financial relationships at point of care
- Include payment information in prescription communications
- Provide comparative prescribing data to patients

Recommendations for Policymakers

1. Sunshine Act Enhancement

- Remove \$10 reporting threshold given influence of minimal payments
- Require real-time reporting rather than annual
- Include device demonstration and sample provisions

2. Market Concentration Review

- Examine potential antitrust implications of 47,511 provider reach
- Assess impact on treatment guideline development
- Consider specialty-specific payment limitations

3. Prescribing Surveillance Systems

- Develop automated correlation detection between payments and prescribing
- Create specialty-specific benchmarks for appropriate prescribing
- Implement outlier detection for high-payment recipients

Conclusion

This analysis of Alcon’s financial relationships with healthcare providers identifies an extensive network within the eye care specialty. The combination of broad provider coverage (47,511 providers), high returns on smaller investments (619.9x ROI), and integrated device-pharmaceutical strategies indicates widespread industry engagement in clinical practice.

The findings suggest correlations between payment amounts and prescribing patterns, with smaller financial interactions showing notable associations with prescribing behavior. Alcon’s focused market approach within eye care specialties warrants examination of market concentration and specialty-specific engagement patterns.

The inverse relationship between payment size and ROI suggests that current disclosure thresholds may not capture all relevant financial relationships. The 619.9x return on sub-\$100 payments indicates different dynamics at various payment levels.

As healthcare systems address cost management and clinical decision-making, these patterns highlight areas for policy consideration. The eye care community operates in an environment where industry relationships are widespread.

Future considerations should include evaluation of current disclosure requirements and oversight mechanisms. Enhanced transparency, appropriate oversight, and clear guidelines regarding industry interactions support informed clinical decision-making.

Methodology

Data Sources

- **CMS Open Payments Database (2020-2024):** 378,790 payment records from Alcon entities
- **Medicare Part D Prescriber Data (2020-2024):** 15,078,321 prescription records
- **NPI Registry:** Provider specialty and credential verification
- **BigQuery Analytics Platform:** Data aggregation and correlation analysis

Analytical Methods

- **Temporal Correlation Analysis:** 180-day window for payment-prescription relationships
- **Return on Investment Calculations:** Prescription value per payment dollar
- **Market Share Analysis:** Therapeutic category comparisons

- **Multi-year Cohort Tracking:** Longitudinal payment recipient analysis
- **Statistical Validation:** Chi-square and correlation coefficient testing

Limitations

- Prescription data limited to captured claims (Medicare Part D + commercial)
- Medical device utilization not comprehensively tracked
- International relationships excluded from analysis
- Sample provisions and demonstration products not captured

Report Generated: August 27, 2025

Analysis Period: January 1, 2020 - December 31, 2024

Total Records Analyzed: 378,790 payments / 15,078,321 prescriptions / 47,511 providers

Data Sources: CMS Open Payments / Medicare Part D / Commercial Claims

For questions or additional analysis, contact: Healthcare Analytics Team