

Market readiness for converting from reusable, flexible cystoscopes to single-use, flexible cystoscopes in Germany, France and the United Kingdom

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Introduction and aim of the study

Reusable cystoscopes have been associated with time consuming reprocessing, availability issues and deteriorated performance over time which have increased the demand for a single-use solution. This has led to new innovative single-use cystoscopes entering the market to overcome these challenges. In this study, we aimed to assess the perception of single-use cystoscopes and investigate the market readiness for adopting the new single-use technology in the three largest markets in Europe.

Materials and methods

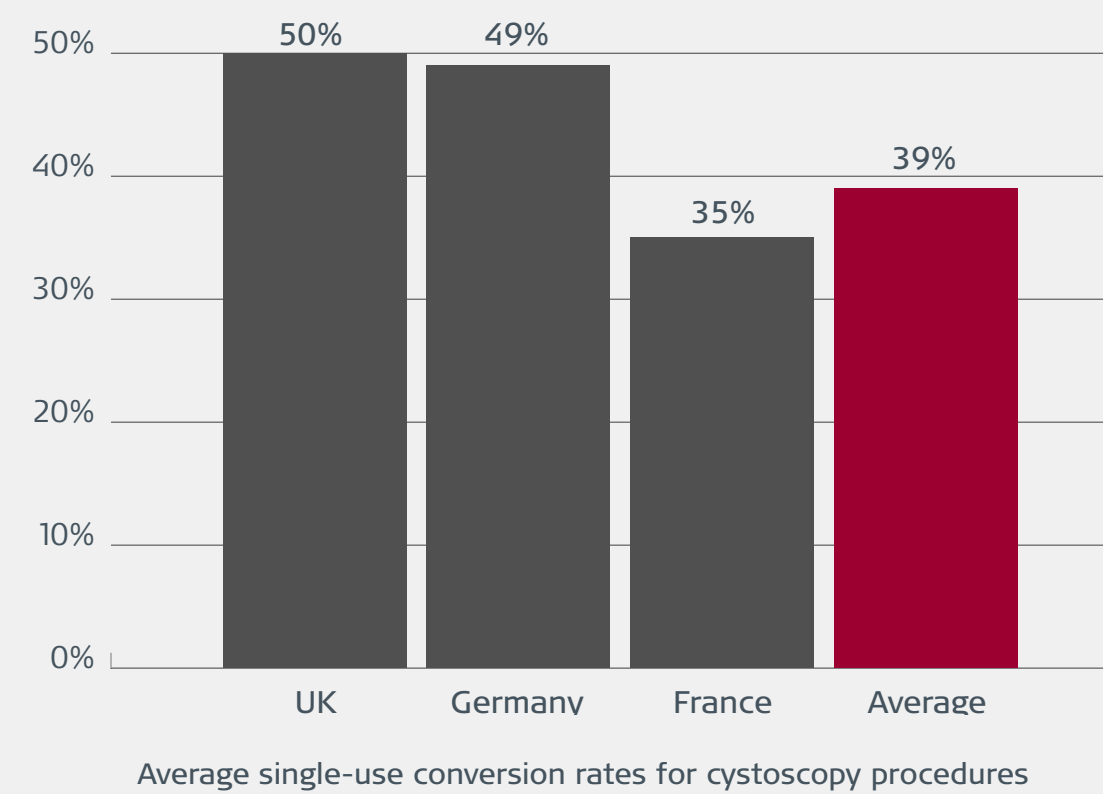
Between February 24, 2020 and March 23, 2020, a total number of 105 urologists performing cystoscopies in both hospitals and clinics answered an electronic survey about their willingness to convert from reusable cystoscopes to single-use cystoscopes. The survey was conducted amongst 35 urologists in Germany, France and UK, respectively. Data were collected using the online survey tool, QuestionPro and analysed in Microsoft Excel.

References

Phan et al., J Endolum Endourol Vol 1(1):e3-e16; April 16, 2018.

Results

Among the 105 respondents 12% were female and 88% were male urologists. Among all respondents 71.4% had more than 10 years of experience performing cystoscopy procedures and 13.3% had less than 7 years of experience. Across all three countries, urologists performing cystoscopies would on average convert 46% of their conventional cystoscopies to be performed with a single-use cystoscope instead of a traditional reusable cystoscope.



Urologists in the UK would on average convert 50% of their procedures to be performed with single-use cystoscopes, compared to Germany and France who on average would convert 49% and 35%, respectively.

Among all respondents, 84.8% were owning all their current cystoscopes, 11.4% had a combination of owning and leasing the cystoscopes. Only 3.8% were leasing all their cystoscopes. There were no significant differences between urologists owning or leasing their cystoscopes and their willingness to convert to single-use. On average 20% of all respondents have often experienced waiting for a cystoscope to become available. Urologists who often have to wait for a cystoscope to become available are significantly more likely to want to convert to single-use cystoscopes instead of reusable cystoscopes (p=0.005).

19% Availability

17% Guaranteed sterility

15% Cost transparency

Single-use cystoscope most important features

Lastly, when urologists were asked about the most important features associated with single-use cystoscopes "availability" ranked the highest (19%) followed by "guaranteed sterility" (17%) and "cost transparency" (15%).

Interpretation of results

Results show that urologists are interested in adopting the innovative single-use cystoscope. Especially urologists who often have to wait for a cystoscope to become available are significantly more likely to convert a larger share of their procedures to be performed with single-use cystoscopes. Availability also ranked the highest, when asked about the most important single-use features. Additionally, guaranteed sterility and cost transparency appear to be key-drivers for converting to single-use devices rather than the conventional reusable cystoscopes needing reprocessing, repair and general maintenance.

Conclusions

This study found that there is an interest amongst urologists to convert from conventional reusable cystoscopes to single-use cystoscopes when performing cystoscopies in both Germany, France, and UK. Additionally, urologists often experiencing availability issues would on average convert a significantly higher share of cystoscopies to be performed with single-use cystoscopes instead of a reusable cystoscope.