

# 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

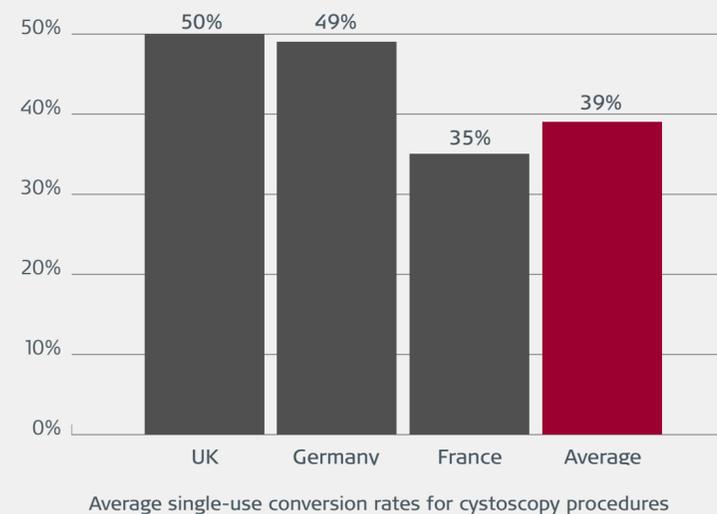
Between February 24, 2020 and March 23, 2020, a total number of 105 urologists performing cystoscopies in both hospitals and clinics answered an electronic survey about their willingness to convert from reusable cystoscopes to single-use cystoscopes. The survey was conducted amongst 35 urologists in 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.