

HSJ Market Intelligence

Specialist Share Data (SSD)

Transform your market intelligence with new patient initiation market share insight



The wide and growing array of combination treatments available across oncological indications calls for a more granular understanding of account level insight. HSJ's SSD can provide new patient initiation and repeat/switch market dynamics at account level and by indication over time.

Analyse account-level variation in new patient prescribing



Discover the share of new patients receiving treatment through SSD's account level indication market share and prescribing trends across oncological indications. Deepen your insight by analysing your own and competitor account-level new initiations and repeat/switch performance.



Uncover previously untapped dynamics into new patient initiation and repeat/switch market insights, highlighting how key accounts are behaving as a result of the increasing options available to patients, especially combination therapies. Investigate key account behaviour in comprehensive market reports and analyse change through time.



Leverage new insights into account level variation to enhance your market intelligence helping to optimise go-to-market strategies and account planning. Plan launches and forecast more effectively with increased awareness and intelligence.

What answers can initiation data give you?

- ✓ Your market share of new patient initiations.
- ✓ Your split of new patients versus repeat/switch patients.
- ✓ If your share of new patient initiations and repeat/switch patients is increasing or decreasing in your licensed indication over time.
- ✓ Which accounts are initiating the highest number of patients with each licensed product, including newly licensed treatments.

Assess and track new patient initiations

Analyse new and repeat market share

Interrogate Account behaviour over time

A Renal Cell Carcinoma (RCC) Case Study



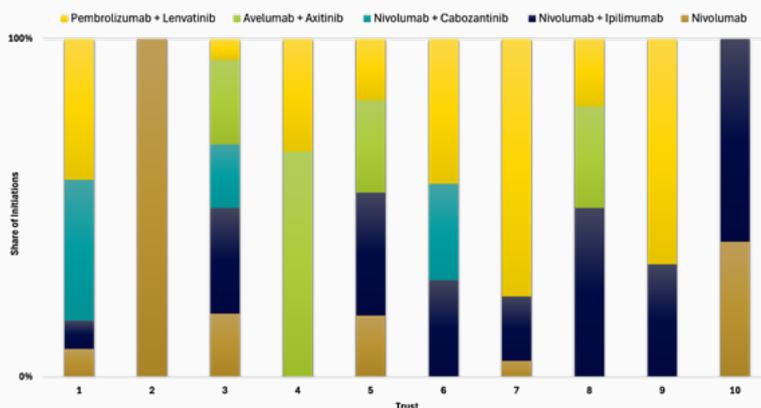
In RCC, there is considerable account-level variation in new patient initiations.

Trust 2 initiated all new RCC patients on Nivolumab, whilst Trust 4 initiated no new patients on Nivolumab.

Eight of these ten trusts initiated new patients on Pembrolizumab + Lenvatinib, but only three trusts initiated patients onto Nivolumab + Cabozantinib.

Half of these Trusts are initiating over 50% of their patients with a single regimen.

RCC Trust Level New Initiation Market Share Jun-24



RCC Change in Initiation and Repeat/Switch Patients Feb-24 vs Jun-24



Pembrolizumab + Lenvatinib has **increased** in both share of new patient initiations and repeat/switch patients.

Nivolumab and Nivolumab + Ipilimumab have both **decreased** in share of new patient initiations and repeat/switch patients.

Nivolumab + Cabozantinib **increased** in share of new patient initiations but decreased in share of repeat/switch patients.

Specialist Share Data: Accelerating success through insight & intelligence



Unlock insight into specialist therapy area market dynamics



Enhance insight on your own and competitor products



Increase visibility of market opportunity and threat

Questions? Please get in touch



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