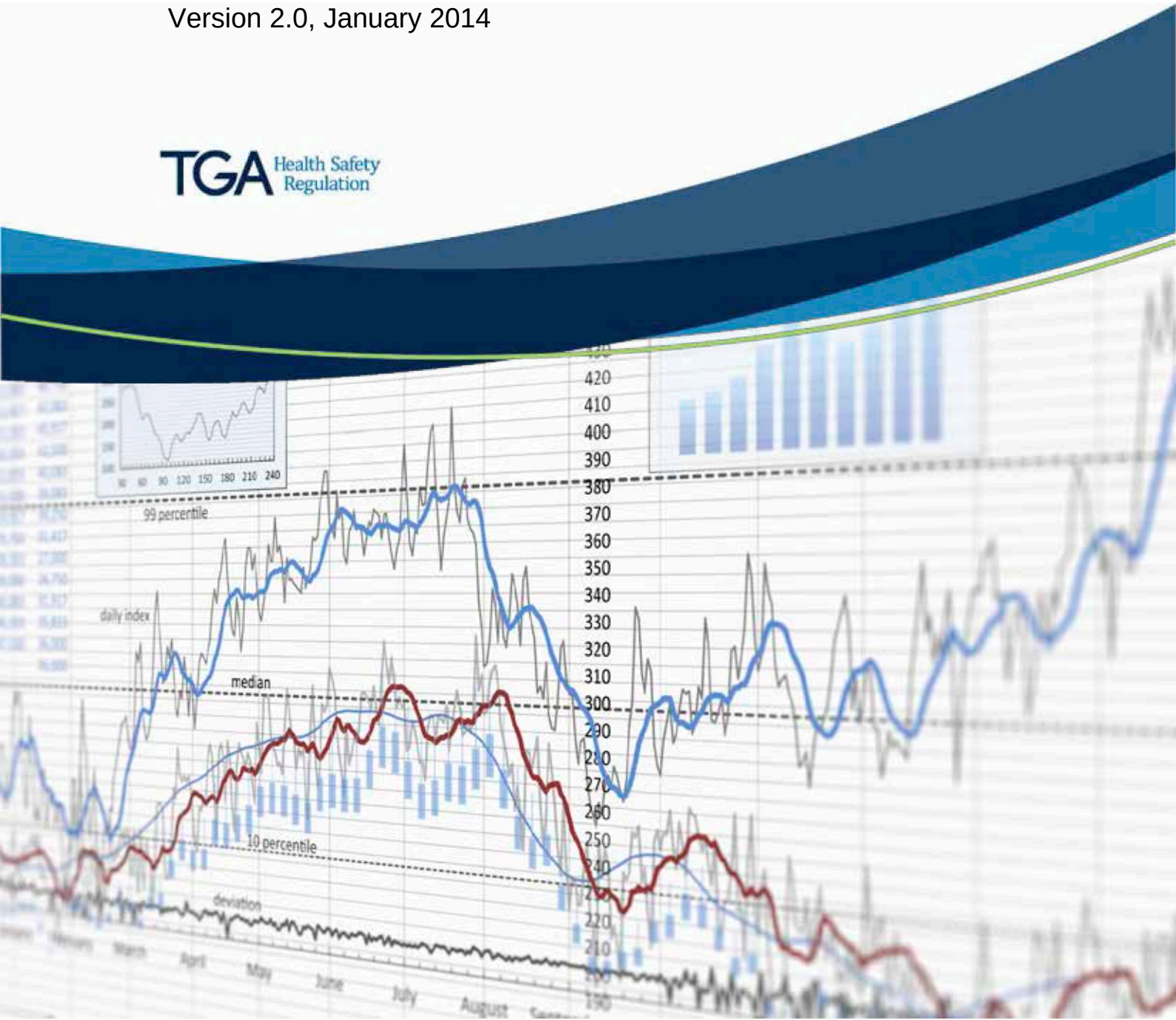
Australian Government
Department of Health
Therapeutic Goods Administration

Informing TGA education and communication activities

Market research: stage two – quantitative research report

Version 2.0, January 2014

TGA Health Safety Regulation



Introduction

In May and June 2013 quantitative market research was conducted separately with individuals from consumers, health professionals and industry to inform the TGA about the best approach to communication and education activities.

This research involved online and telephone surveys with:

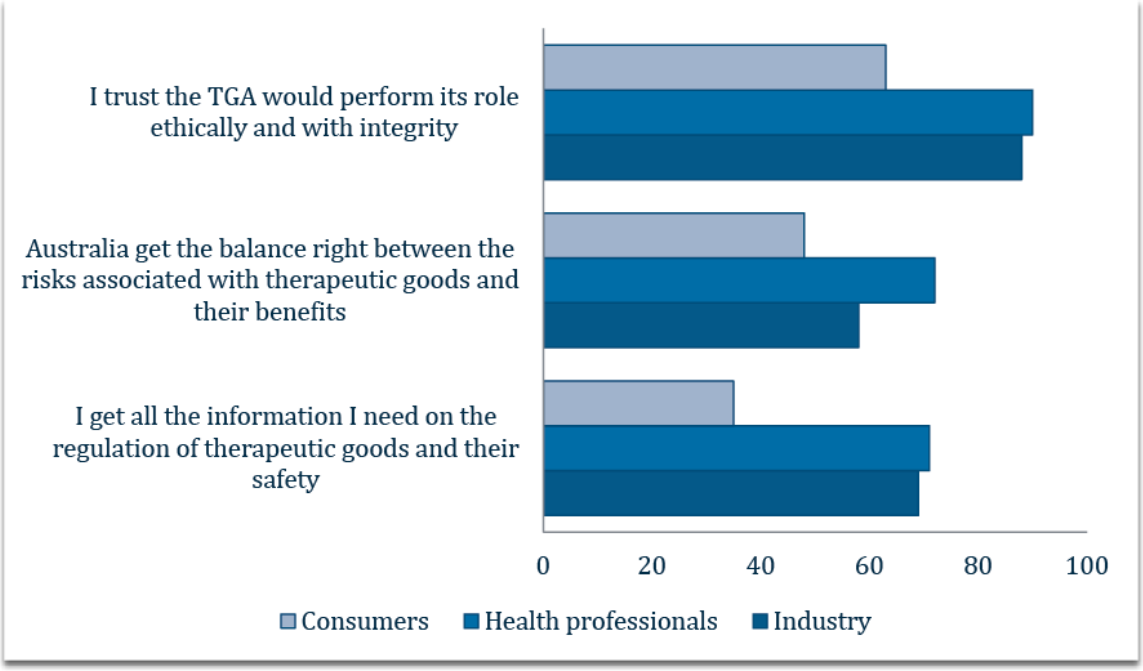
- consumers—759 participants across a range of ages and locations to be representative of the Australian population
- health professionals—100 participants consisting of general practitioners, specialists, practice managers, nurses, midwives, pharmacists, and allied and complementary health practitioners
- industry—125 participants consisting of a mix of owners, employees, consultants, lobbyists and other members of the regulated industry.

Research results

Perceptions of Australia's regulatory system

Each of the stakeholder groups were asked questions to measure their perceptions of the TGA, including levels of trust and perceived transparency. Results are provided in Figure 1.

Figure 1: Perceptions of the TGA across stakeholder groups



In addition to these questions, consumers and health professionals were asked whether all therapeutic goods should be completed checked and assessed to be risk free. Eighty one percent of consumers and 86 per cent of health professionals agreed with this statement, suggesting these groups have unrealistic expectations of what we can achieve. The

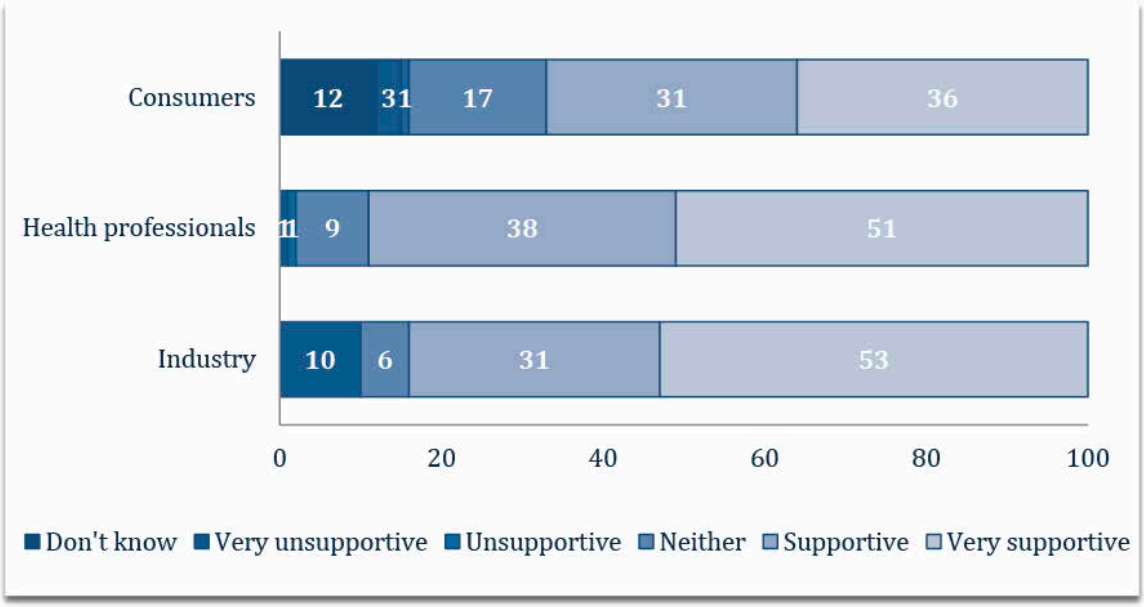
qualitative research conducted previously indicated that on being given more information, consumers develop more realistic expectations.

Particularly with consumers, the difference between their high expectations and their lower levels of trust and knowledge provides an indication that we must provide them with appropriate information in order for them to understand and have confidence in us. Addressing this need has been integral to the development of new educational materials.

Support for therapeutic goods regulation

Levels of support for the TGA and its role in regulating medicines and medical devices were high across all sectors (outlined in Figure 2). Even the consumers who rated their knowledge of the TGA as poor or very poor were supportive of the TGA's role after receiving information about it.

Figure 2: Levels of support for the TGA



Awareness of therapeutic goods and their regulation

Consumer participants were asked if they know what a therapeutic good is and whether or not they are regulated. Sixty six per cent of participants claimed to be familiar with the term and 71 per cent were aware that therapeutic goods are regulated, with higher levels of awareness among older participants.

It was assumed that health professionals and industry members would be familiar with the term, so they were instead asked if they knew that they either prescribe (health professionals) or supply (industry) items that are therapeutic goods. As anticipated, awareness levels were high: 89 per cent for health professionals and 94 per cent for industry. There were no significant differences between the subgroups of health professionals for this measure.

Knowledge of TGA and understanding of its role

Industry participants had a high level of knowledge of the TGA and understanding of our role. However, there were comparatively low levels of understanding among both consumers and health professionals.

While 65 per cent of consumer participants said they were aware of the TGA, only 17 per cent rated their knowledge of the TGA as 'good' or 'very good'. This result was consistent across age groups, gender and geographical locations.

The vast majority of health professionals had heard of the TGA (94 per cent); however, only 27 per cent claimed their overall knowledge of the TGA was good or excellent, and allied and complementary health professionals were more likely to indicate their overall knowledge was poor or very poor. To address this knowledge gap, we have already developed an education program targeting health professionals that includes direct face to face contact through conferences and the provision of written resources for both fully qualified practitioners and students.

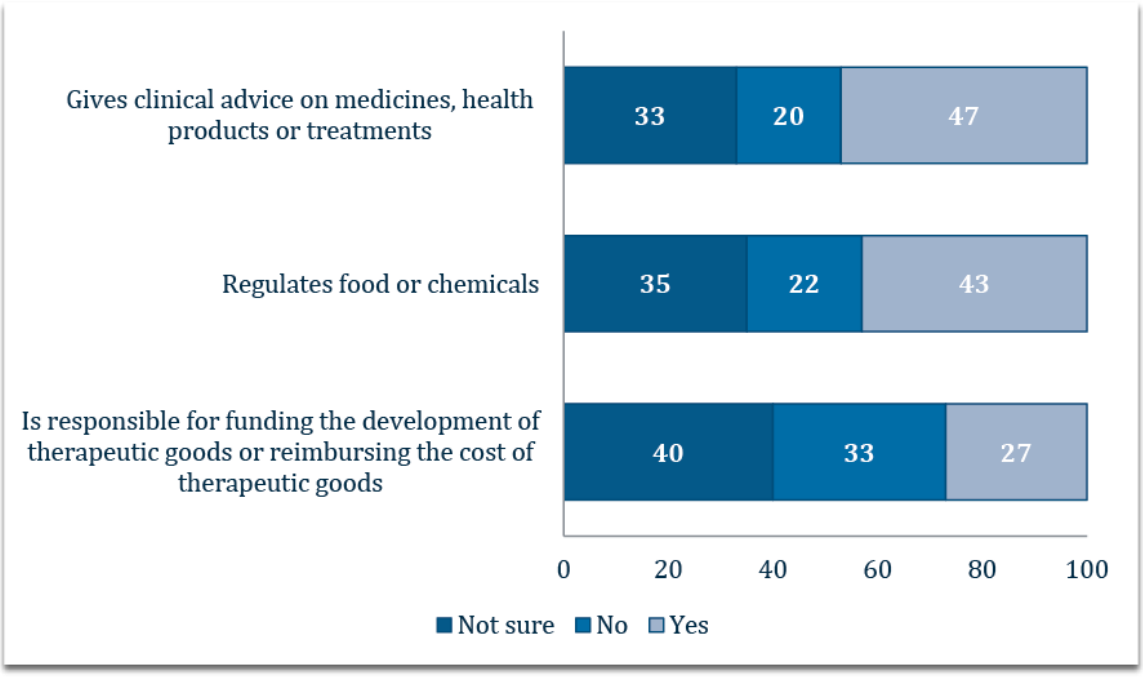
Common misconceptions about the TGA's role

To provide further information on where there are misconceptions about our role, participants were asked whether or not they thought we undertook activities that are not part of our remit.

Consumers

Many consumer participants incorrectly thought the TGA undertakes the activities outlined in Figure 3 below.

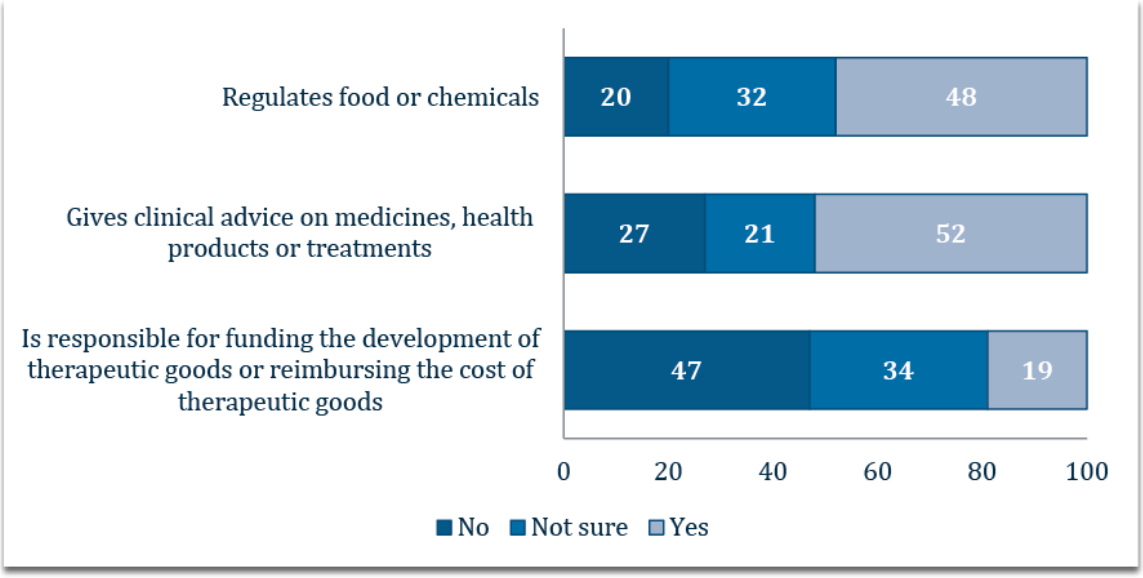
Figure 3: Common consumer misconceptions of TGA activities



Health professionals

Health professionals were also asked whether they thought we undertake these activities that are not part of our role. The high levels of belief that we give clinical advice and regulate food or chemicals is cause for concern, and we have developed targeted educational materials that clarify our role and correct these misconceptions.

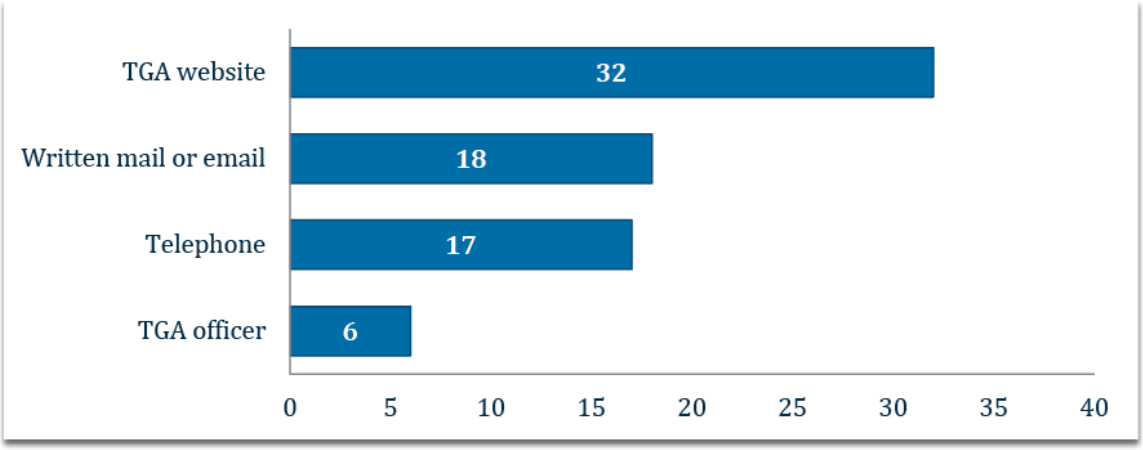
Figure 4: Common misconceptions about the TGA's role among health professionals



Personal contact with the TGA

Members of the regulated industry had high levels of personal contact with TGA. By comparison, 90 per cent of consumers reported no direct contact with us at all, which is not surprising. Among health professionals, 48 per cent reported personal contact. The results for each contact point are provided in Figure 5.

Figure 5: TGA contact points used by health professionals



Knowledge of specific regulatory activities

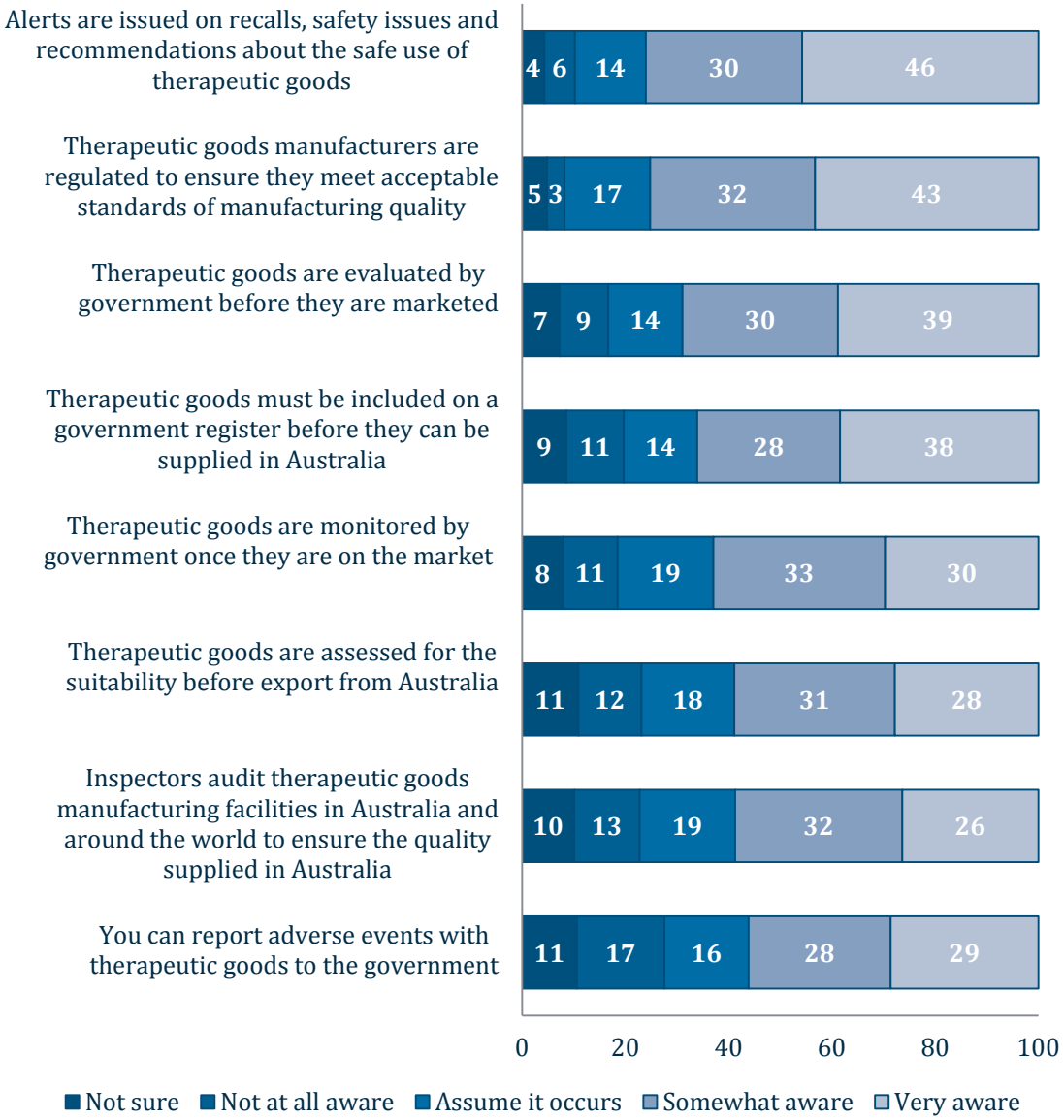
Awareness of regulatory activities

This research was undertaken in order for us to determine where there are significant knowledge gaps. Industry participants had high levels of knowledge across each of the measures; however, there were mixed responses from the consumer and health professional participants.

Consumers

For consumers, the highest levels of awareness were around recalls and safety alerts. This may be due to the higher levels of media attention they receive, which was identified through the qualitative research stage as a major trigger for consumers to seek further information. Reporting adverse events had the lowest level of awareness, and we have already begun to highlight the importance of adverse event reporting across educational materials targeting consumers.

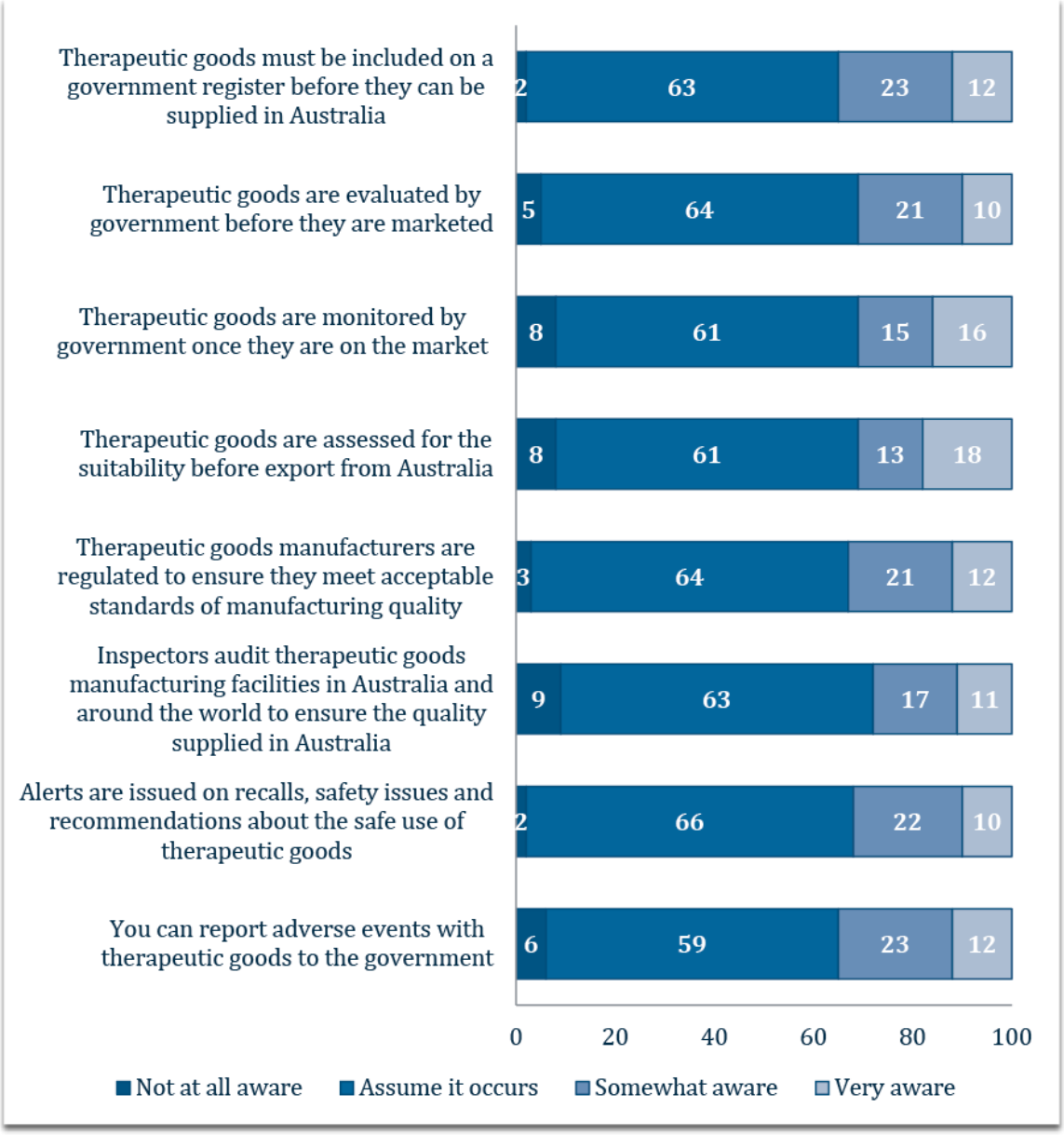
Figure 6: Consumer awareness levels of specific regulatory activities



Health professionals

In contrast, the results for health professionals did not show significant differences in levels of awareness between the different activities. However, it is important to note that across all the activities, there were high levels of participants assuming that they occur, as opposed to being aware that they actually do. For each activity, only up to 35 per cent were actually aware, and between 59 per cent and 66 per cent assumed it occurred. The risk with this high level of assumption is that health professionals may not respond to our communications due to the belief they do not contain any new information. Therefore, we must ensure we provide materials that challenge incorrect perceptions and are personally relevant to the health professional audience.

Figure 7: Health professional awareness levels of specific regulatory activities



Within this measure, there were some significant differences between the different types of health professionals:

- GPs were more likely to be somewhat aware that alerts are issued on recalls, safety issues, etc. Allied and complementary health professionals were more likely to be not at all aware.

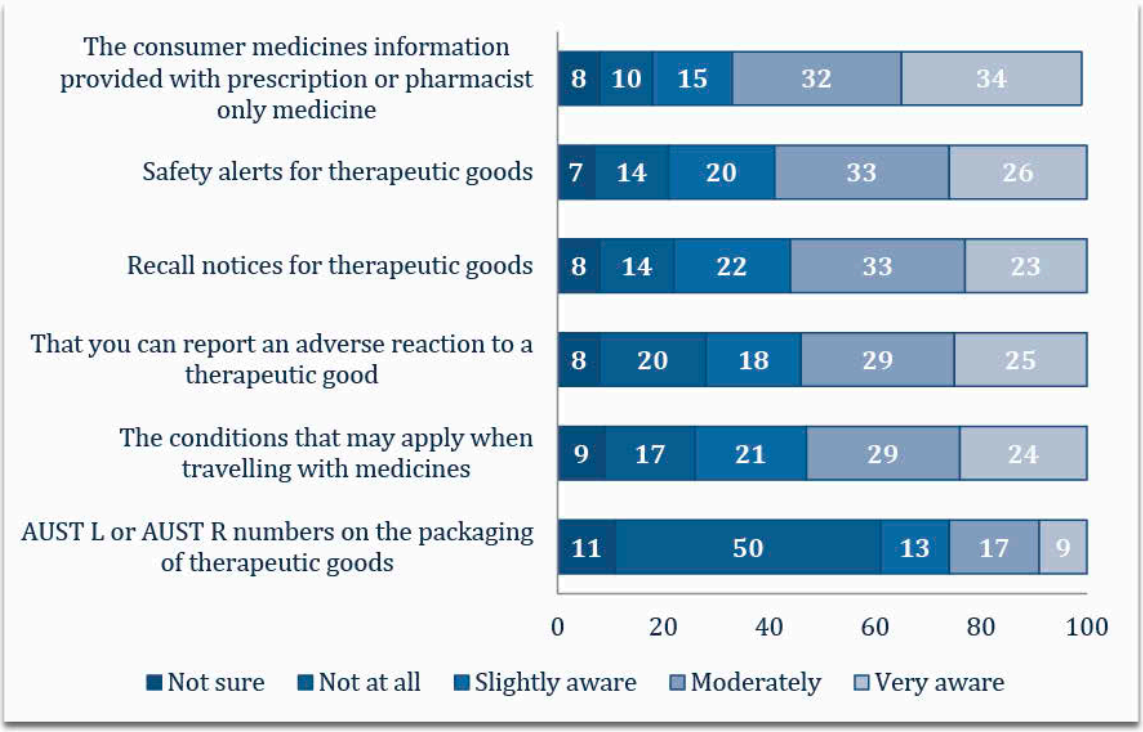
- Pharmacists were more likely to assume you can report adverse events to the government, while GPs were more likely to be somewhat aware compared to allied and complementary health professionals.

Awareness of specific TGA practices

Consumers

Consumer participants were asked about their levels of awareness of certain TGA practices.

Figure 8: Consumer awareness of TGA activities



As a result of the low level of awareness of AUST L and AUST R numbers on the packaging of therapeutic goods (and what they mean) we have created educational material on this subject.

Preferred information sources

All stakeholders were asked about their preferred information sources to guide us in determining the best format for materials and to inform our dissemination strategies. Across all groups, there was a clear preference for electronic information available on the TGA website.

Health professionals also indicated a strong preference for receiving information via email alerts. Face to face education and seminars were a popular choice among industry participants.

Social media was not seen as an effective mechanism for distributing TGA information; however, it did rate more highly among younger consumers. Limited use of this medium may be considered for the distribution of targeted information aimed specifically at this audience.

Figure data

Figure 1: Perceptions of the TGA across stakeholder groups

Statement	Industry	Health professional	Consumers
I trust the TGA would perform its role ethically and with integrity	88	90	63
Australia get the balance right between the risks associated with therapeutic goods and their benefits	58	72	48
I get all the information I need on the regulation of therapeutic goods and their safety	69	71	35

Figure 2: Levels of support for the TGA

Stakeholder	Don't know	Very unsupportive	Unsupportive	Neither	Supportive	Very supportive
Consumers	12	3	1	17	31	36
Health professionals	0	1	1	9	38	51
Industry	0	10	0	6	31	53

Figure 3: Common consumer misconceptions of TGA activities

Misconception	Not sure	No	Yes
Gives clinical advice on medicines, health products or treatments	33	20	47
Regulates food or chemicals	35	22	43
Is responsible for funding the development of therapeutic goods or reimbursing the cost of therapeutic goods	40	33	27

Figure 4: Common misconceptions about the TGA's role among health professionals

Misconception	No	Not sure	Yes
Regulates food or chemicals	20	32	48
Gives clinical advice on medicines, health products or treatments	27	21	52
Is responsible for funding the development of therapeutic goods or reimbursing the cost of therapeutic goods	47	34	19

Figure 5: TGA contact points used by health professionals

Contact point	Number of health professionals
TGA website	32
Written mail or email	18
Telephone	17
TGA officer	6

Figure 6: Consumer awareness levels of specific regulatory activities

Activity	Not sure	Not at all aware	Assume it occurs	Somewhat aware	Very aware
Alerts are issued on recalls, safety issues and recommendations about the safe use of therapeutic goods	4	6	14	30	46
Therapeutic goods manufacturers are regulated to ensure they meet acceptable standards of manufacturing quality	5	3	17	32	43
Therapeutic goods are evaluated by government before they are marketed	7	9	14	30	39
Therapeutic goods must be included on a government register before they can be supplied in Australia	9	11	14	28	38
Therapeutic goods are monitored by government once they are on the market	8	11	19	33	30
Therapeutic goods are assessed for the suitability before export from Australia	11	12	18	31	28
Inspectors audit therapeutic goods manufacturing facilities in Australia and around the world to ensure the quality supplied in Australia	10	13	19	32	26
You can report adverse events with therapeutic goods to the government	11	17	16	28	29

Figure 7: Health professional awareness levels of specific regulatory activities

Activity	Not at all aware	Assume it occurs	Somewhat aware	Very aware
Therapeutic goods must be included on a government register before they can be supplied in Australia	2	63	23	12
Therapeutic goods are evaluated by government before they are marketed	5	64	21	10
Therapeutic goods are monitored by government once they are on the market	8	61	15	16
Therapeutic goods are assessed for the suitability before export from Australia	8	61	13	18
Therapeutic goods manufacturers are regulated to ensure they meet acceptable standards of manufacturing quality	3	64	21	12
Inspectors audit therapeutic goods manufacturing facilities in Australia and around the world to ensure the quality supplied in Australia	9	63	17	11
Alerts are issued on recalls, safety issues and recommendations about the safe use of therapeutic goods	2	66	22	10
You can report adverse events with therapeutic goods to the government	6	59	23	12

Figure 8: Consumer awareness of TGA activities

Activity	Not sure	Not at all	Slightly aware	Moderately	Very aware
The consumer medicines information provided with prescription or pharmacist only medicine	8	10	15	32	34
Safety alerts for therapeutic goods	7	14	20	33	26
Recall notices for therapeutic goods	8	14	22	33	23
That you can report an adverse reaction to a therapeutic good	8	20	18	29	25
The conditions that may apply when travelling with medicines	9	17	21	29	24
AUST L or AUST R numbers on the packaging of therapeutic goods	11	50	13	17	9

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Reference/Publication R14/10026