Australian Government

Department of Health

Therapeutic Goods Administration - Stakeholder Survey 2017

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Executive Summary

An online survey was conducted amongst TGA stakeholders in July 2017. The survey provided opportunities for stakeholders to feedback to TGA across a range of service and activity areas.

A total of 2,535 responses to the survey were received during the survey period, a response rate of 12%. Respondents include a broad range of groupings, including strong representation from the Medical products industry, Health professionals, Academics and Government stakeholders, Community, Industry association representatives and Advocates.

Reputation, trust and risk management

The trust placed in the TGA by its core stakeholder group represents a key strength of the organisation. Nearly nine in ten stakeholders trust the TGA to perform its role ethically and with integrity. This level of trust and strong reputation is also perceived to carry across to the TGA's international reputation, with three in four survey participants agreeing that the TGA is well regarded on the international stage.

Two measures focussing on risk show that around 70% of respondents feel that the TGA is balancing risks appropriately and managing risks proportionately. Despite strong outcomes, these areas offer opportunities to address concerns of the more than one in 10 stakeholders who feel that this is not the case.

The outcomes in these areas show a general trend toward improvement compared to the 2016 survey results. Of particular note are strong results within the largest subgroup (medical products industry), where results are consistently strong across both product sponsors and product manufacturers.

Continued opportunities to maintain and improve on these measures are identified in relation to the potential for ongoing work with those in Community, Government, Industry association representatives, Dental practitioner and Complementary healthcare groupings.

Confidence in the TGA

Confidence in the TGA across the range of measures tracked shows some variation. Four of the seven measures – Technical competence, Well thought out decisions, Scientifically valid decisions and Fairness – fall below 60% Nett high confidence levels and two of the remaining three measures – Providing safeguards for Australians and Trustworthiness – at or above 70% Nett high confidence. These outcomes reflect a general (slight) decline in the proportion of people highlighting high levels of confidence in the TGA across all measures. This decline did not, however, translate into higher numbers of respondents in the low confidence ratings categories, with more respondents instead identifying as having Moderate (rather than low) confidence in the TGA.

Confidence levels across key stakeholder groups show generally higher confidence levels within the community and medical products industry groupings and lower levels of confidence within Government. Within the key medical products industry category, there is also a strong divide between the views of industry association representatives (who show far lower levels of confidence) and both product sponsors and manufacturers.

For medical professional groupings, the data indicates lower levels of overall confidence amongst complementary healthcare practitioners, fluctuating confidence amongst the small numbers of dental, nursing and pharmacist professionals and strong levels of confidence amongst medical professionals.

Whilst more general outcome areas related to trust and the overall outcomes in protecting Australians remain positive here, key opportunities to communicate and establish higher confidence in relation to decision making and associated technical competence remain. Communication and transparency in demonstrating clear and technically valid decision making and engaging a range of key stakeholders is required. Engagement and communication strategies to understand and address the concerns of key stakeholder groups, most notably medical products industry, health professional and government groups are recommended.

Collaboration, consultation and feedback

Notable improvements are identified since 2016 across all measures relating to collaboration, consultation and feedback. These improvements resulted in Nett agreement of more than 50% across 6 of 7 (up from 2 in 7 in 2016) measures. Despite these improvements, this focus area continues to highlight key opportunities for ongoing improvement.

Whilst almost seven in ten survey participants highlight that they are able to provide feedback to the TGA, levels of agreement on how the TGA will respond, its willingness to consult in a timely way, opportunities to provide input into key decisions and overall collaboration highlight that many stakeholders feel that the ability to provide meaningful input at appropriate times is limited. Specific ongoing areas for focus include perceptions around the timeliness of consultation, listening to feedback, providing opportunities for input on key issues and decisions, and providing a range of feedback channels that both seek and share information and collaboration.

The variation across groups here suggests that strategies to better engage some specific groups will be beneficial. In particular, a focus on Government, Industry association representatives, Academics and Retailers is warranted.

Communication and information services

Identification of information and communication channels used by stakeholders continues to highlight that all available information channels are in use with a continued dominance of the TGA website and business services portal as the key channels employed. A focus on ensuring these key resources are well targeted, navigable, logical and clear represents a key priority in this area.

Despite the continuing dominance of website channels, the uptake of other services shows a trend across years for more respondents to highlight some use of each channel. This was particularly the case for email subscription services and the TGA consultation forecast. Other commonly utilised channels include the RSS feed and high engagement (face to face) channels such as roadshows, information sessions and conference booths.

Ratings of the usefulness of each information channel is characterised by high variation. Consistent with 2016, TGA guidelines, TGA Updates and Safety information were the most positively viewed. In particular, both TGA updates and Safety information appeared to show improvements in comparison to 2016, with rises of 6% and 4% respectively in the Nett useful ratings.

The overall patterns in this area are highly consistent with 2016, with few people highlighted that the range of information resources were not useful at all. There are exceptions here, with Medicines shortage alerts, TGA AusPAR, Prescription medicine, NCE registrations and SME assist all showing lower usefulness outcomes. These services generally showed higher levels of not applicable ratings and marked variations across stakeholder groupings, highlighting the continued targeted nature of these resources.

Findings in relation to specific stakeholder groups in the survey demonstrate the importance of understanding the specific information needs of each target audience. Ongoing efforts to clearly understand and meet the communication needs of each stakeholder group are warranted.

Contact with TGA

Contact with the TGA most frequently occurs via email or phone with most participants who highlight contact reporting relatively infrequent contact of once a month or less. Fax and Letter contacts remain in use by small numbers of stakeholders, however these appear to be in decline and will likely become more infrequent in future.

Medical products industry (most notably regulatory affairs consultants) and Government stakeholders tend to be in contact more often than other groups in the survey. Contact most frequently occurs for core business reasons, with application lodgement, progress updates on applications and information about specific products the most commonly cited reasons for contact.

Satisfaction with responses for the variety of contact methods tested highlights strong variation across contact methods employed. Phone, email and website contacts show the strongest positive outcomes. The strongest indicator of satisfaction is response time, reinforcing the need to ensure responsiveness of communications. This outcome also reinforces the need to maximise the ability for stakeholders to achieve fast response times via self-service mechanisms such as the TGA website.

Overall satisfaction with communications outcomes shows 69% Nett satisfaction (up 6% from 63% in 2016) and 12% Nett dissatisfaction (down 3% from 15%). Satisfaction was strongest amongst Health professional and Medical products industry groups and lower amongst Government stakeholders.

TGA website

The TGA website continues to be broadly used, with 90% of survey participants highlighting some use of the site and frequency of use patterns consistent with 2016.

Regular use of the site is highest amongst industry users, with 31% of Medical product industry respondents highlighting weekly or more visits to the site (within this group regulatory affairs consultants show very high regular use 60%). Within the industry grouping, frequent visits to the site are also strongly related to organisational size, with weekly or more frequent use increasing steadily with the number of employees (to a high of 69% amongst those with 1000-1499 employees).

A broad range of reasons for accessing the site are highlighted. The most common reasons are to seek guidance documents, access databases and seek fees and charges information, however significant interest was identified across all categories listed in the survey. This continued broad use of the site reinforces the success of the site in catering to a broad range of needs and interests.

Overall satisfaction with the information website is strong, with 72% of stakeholders who have experienced the site expressing satisfaction and a minimal 6% expressing dissatisfaction (2016 69% Nett satisfaction and 7% dissatisfaction). Satisfaction is very strong amongst the key Medical products industry group (74%; including consistently strong outcomes amongst sponsors, manufacturers and regulatory affairs consultants) as well as amongst retailers (71%). Satisfaction is lowest amongst Government (56%) and Industry association (43%) users. Where dissatisfaction occurs, comments provided by users highlight a strong association with navigation and the ease of identifying information.

Ongoing enhancement of the site through continuous monitoring and site intercept surveys to fully understand the breadth, characteristics and needs of site visitors will provide a more detailed picture of the use and effectiveness of the site in meeting user needs in a logical, user friendly and efficient manner.

TGA business services portal

Use of the Business services portal is reported by just over 8 in 10 participants. Use of the site was most commonly infrequent, just under half reporting they use the site monthly or less. Medical products industry and Government stakeholders tend to visit the site most frequently, with 55% of industry and 45% of Government stakeholders visiting Monthly or more often. In particular Regulatory affairs consultants, Product sponsors and Industry association representatives show high, frequent use of the site. Frequent use is also strongly associated with the size of stakeholders' organisations.

The patterns and reasons for use amongst stakeholders are highly consistent with findings from 2016, when the most common reasons for accessing the site were to lodge an application or check the progress of an application.

Satisfaction with the site remains steady (compared to 2016), with 66% highlighting satisfaction and just over 11% dissatisfaction. Importantly, satisfaction was particularly strong amongst key user groups of product sponsors (74%), manufacturers (74%) and regulatory affairs consultants (76%).

TGA activities and events

Close to one in four respondents indicate having attended a TGA event or activity. Participants highlight participation across the full range of activities conducted by the TGA as well as identifying a range of external events where the TGA was represented or provided input as a participant.

Satisfaction with consultations varied across measures, with strong outcomes in relation to the information provided (76% Nett satisfaction) and ability to provide input (71%). In contrast, the measure focussed on follow-up procedures (49%) represents a key opportunity area to improve the overall experience of participants. In particular, this rating is important for participants as effective follow-up processes provide a sense of completion and have the potential to provide an amplified impact as a result of being the most recent experience of the consultation. Overall satisfaction is generally in line with 2016 outcomes, with a trend toward slightly lower levels of dissatisfaction also apparent.

Exhibitions are generally positively received.

SME assist

Around one in five industry participants with fewer than 200 employees identified are aware of SME assist. Awareness increases in line with employee numbers and is similar across both Product sponsor and Product manufacturer categories.

Amongst those who are aware of SME assist, access is highest amongst the smallest employers. The high access amongst this group, who are overall less likely to be aware of the site, highlights a particular opportunity for targeted promotion activities aimed at increased awareness.

Where use of the portal does occur, the experience of stakeholders is generally positive.

Introduction

This report provides a summary of findings from the 2017 Therapeutic Goods Administration stakeholder survey.

Methodology

A survey of stakeholders of the TGA was conducted in July 2017. Key stakeholders identified through TGA mailing and client listings were invited to log in to an online survey and provide feedback across a range of service areas.

The survey was developed by the TGA in conjunction with the Market Research Unit. The final methodology for the survey, including the questionnaire, was approved by the Australian Bureau of Statistics Statistical Clearing House in 2016. The 2017 survey replicates the 2016 survey, allowing identification of trends across years.

Key focus areas for the survey were:

- Reputation and trust in TGA;
- Risk management;
- Communications and information;
- TGA information website;
- TGA Business services website;
- SME Assist; and
- TGA Consultations and events.

The survey was open from 3 July 2016 until 21 July 2017. During the survey period potential participants were invited to participate via an individualised email. To encourage participation, non-respondents were issued with up to three reminder emails throughout the survey period.

A total of 21,214 unique emails were sent an invitation to the survey. Response rates are outlined in Figure 1 below.

Figure 1: Response rates

As outlined above, 3,732 emails were identified as invalid. Amongst the valid group of emails in the sample (n=17,482), 2,928 survey log-ins were recorded, with 2,535 providing valid responses to the survey. Based upon the invitation numbers, the final response rate for the survey is 12% (or 15% based upon the known valid sample of 17,482).

Data was downloaded directly from the Qualtrics survey host site in .xls format. Analyses were conducted in Microsoft Excel. Analyses consisted of basic cross tabulations across all question sets and major variables of interest and comparison of results (where available) with the previous survey conducted in 2016.

A feature of the survey design was to allow all respondents to opt out of individual questions or progress through the survey without answering all questions. Where possible, questions were not compulsory, allowing for no response to be provided. Whilst minimising survey drop outs, this structure has implications for the data that results from the survey, with varying levels of completion applicable to each question in the survey. Analyses in this report are based upon only those participants who answered each question, excluding those who did not answer.

Results

Sample profile

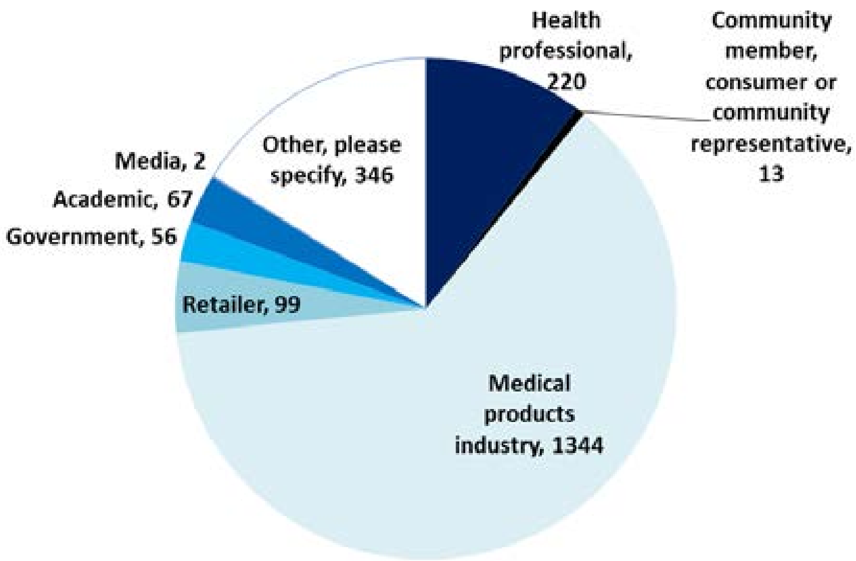
Participants were asked a range of questions about their organisation, role and industry background. Table 1 and Figure 2 show the roles of respondents. Participation in the survey includes representation from across the range of industry and professional roles.

Table 1: Respondent roles

Which of the following best describes you?	
Category	**N**
Medical products industry	1,344
Health professional	220
Retailer	99
Academic	67
Government	56
Community member, consumer or community representative	13
Media	2
Other, please specify	346

N=2,147

Figure 2: Industry



N=2,147

The most commonly identified category is Medical products industry (63% of respondents to the question), with Health professionals (10%), Retailers (5%), Academics (3%) and Government (3%) also represented in the sample. There are minimal numbers of participants identifying within the Community and Media categories.

Amongst the large groups of respondents who highlight a role in the Medical products industry, the most commonly identified role is that of product sponsor. This group represents 57% of respondents in this category. Product manufacturers are also commonly identified, representing just under one third (30%) of the group, with consultants (9%) and industry association representatives (1%) represented by smaller numbers.

Forty four (44) participants identified in the other category, with the range of Roles in the industry identified amongst this group including:

- Distribution, services, importing and logistics;
- Ingredient supply and manufacture;
- Product design;
- Administration and accounts;
- CRO;
- Quality assurance; and
- Clinical research.

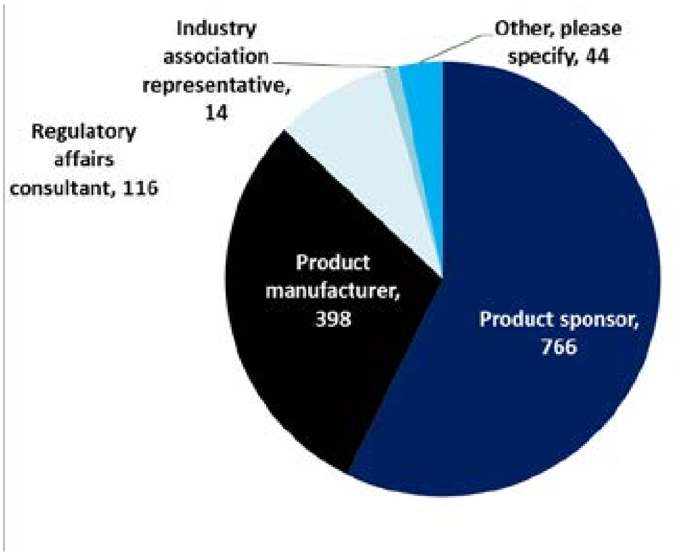
Table 2: Medical products industry - respondent roles

Which category best describes your role in the medical products industry?	
Category	**N**
Product sponsor	766
Product manufacturer	398
Regulatory affairs consultant	116
Industry association representative	14
Other	44
How many employees work for the company in Australia?	
Employees	**N**
1-19	510
20-99	293
100-199	95
200-599	178
600-999	40
1000-1499	16
1500+	21

Role: N=1,338; Employees: N=1,153

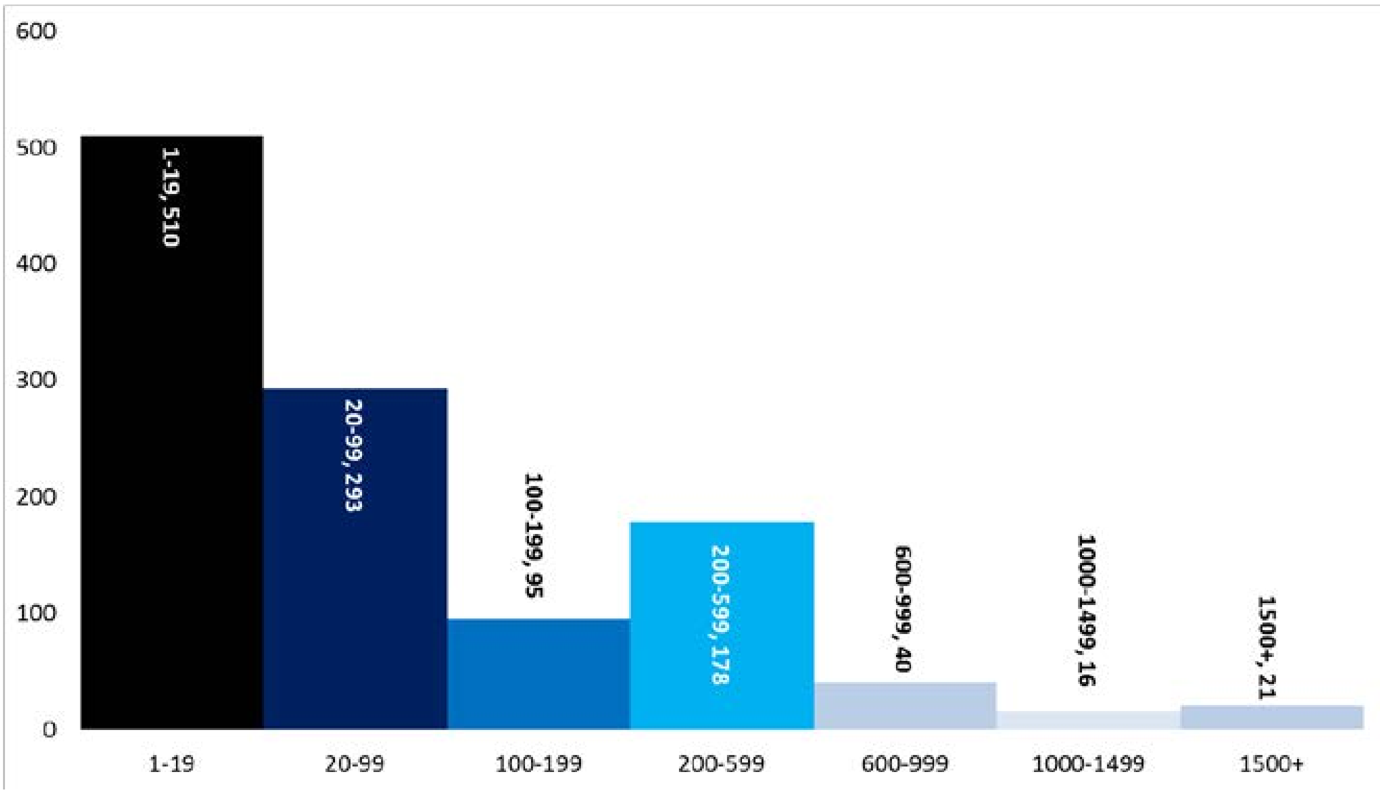
Those working in the Medical products industry were spread across a range of organisational sizes (Table 2). Most commonly, respondents identified their organisation as having less than 20 employees (510; 44%). One in four (293; 25%) identified 20-99 employees, and 8% (95) identified in the 100-199 category. A further 15% (178) in organisations with 100-599 employees. Minor numbers were identified in the largest employee categories (600-999, 40, 3%; 1000-1499 16, 1%; 1500+, 21, 2%).

Figure 3: Medical products industry – respondent role



N=1,338

Figure 4: Medical products industry – number of organisational employees in Australia



N=1,153

Product sponsors and Product manufacturers were also asked to highlight the types of products that they focus on in their roles. Medical devices (n=1003) are the most commonly identified products across both sponsor (491) and manufacture (235) roles. Prescription medicines are the second most commonly identified products amongst product sponsors (291) and the third most identified category amongst manufacturers (72). Over the counter medicines and complementary medicines are also commonly identified.

Of the 762 responses received amongst Product sponsors here, 224 (29%) identify more than one category. Most commonly, this includes one or more medicines categories and the medical devices category. Amongst Manufacturers 399 responses were recorded, with 65 (6%) recording more than one response, representing a slightly lower tendency for diversity amongst product types than for sponsors. Where multiple product types are manufactured this most commonly includes a combination of two or three of the medicines categories.

Table 3: Product types – Sponsors and manufacturers

What type of products do you sponsor?	
Product type	**N**
Medical devices	491
Prescription medicines	291
Over the counter medicines	176
Complementary medicines	139
Blood and/or tissue products	29
Other	22
What type of products do you manufacture?	
Product type	**N**
Medical devices	235
Complementary medicines	74
Prescription medicines	72
Over the counter medicines	55
Blood and/or tissue products	19
Other	45

Sponsors: N=766; Manufacturers N=398.

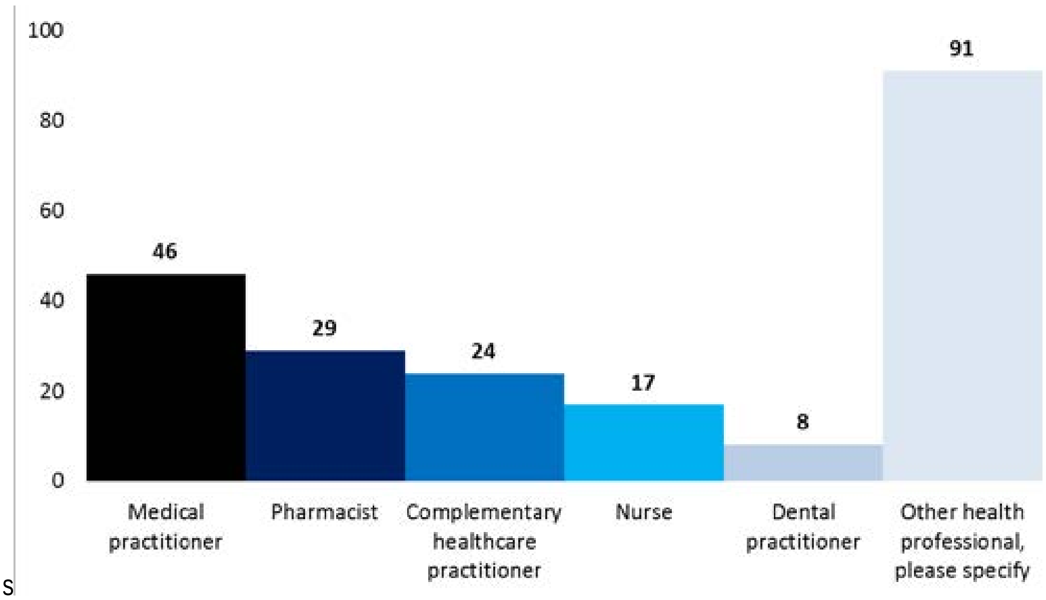
Health professionals most commonly identify themselves in the “Other” category (n=91). A range of roles are identified in the open ended response for this category. These include high numbers scientists or researchers (36; 17%), Pathology professionals (13; 6%) and a range of allied health professionals (Table 4).

Table 4: Health professionals – main role

Which category best describes your role as a health professional?		
Category	**N**	**%**
Complementary healthcare practitioner	24	11
Dental practitioner	8	4
Medical practitioner	46	21
Nurse	17	8
Pharmacist	29	13
Other health professional, please specify	91	42
Health professionals - Main role - Other - Coded		
Medical scientist/Research	36	17
Pathology	13	6
Quality assurance	4	2
Physiotherapist	4	2
Admin/accountant	4	2
Dietician	3	1
Regulation/Reg affairs	3	1
Education	2	1
Nurse	2	1
Other	13	6

N=215

Figure 5: Health professionals – respondent role (N)



N=215

Amongst the small number of people who identify their primary role as in the community there is representation from consumers, advocates, carers and patients (Table 5).

Table 5: Community – roles

Which category best describes your role in the community?	
Category	**N**
Consumer	5
Consumer health representative or advocate	4
Carer	2
Patient	1
Other, please specify	1

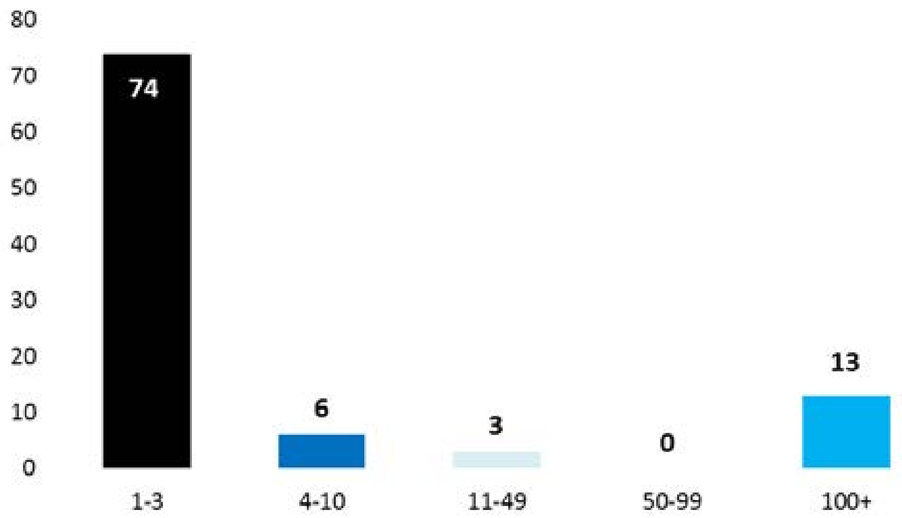
N=13

Consistent with the 2016 results, just over three in four retail businesses have between one and three outlets (Table 6 and Figure 6). A further 14% indicate that they are very large businesses with 100 or more outlets. Small numbers of respondents identified in the remaining categories.

Table 6: Retailers – number of outlets

How many retail outlets does the business have?		
Number of outlets	**N**	**%**
1-3	74	77
4-10	6	6
11-49	3	3
50-99	0	0
100+	13	14
N	96	100

Figure 6: Retailers – Number of retail outlets (%)



N=96

Reputation, trust and risk management

Agreement levels on statements focussing on the reputation and trust associated with the TGA show generally strong levels of agreement and low disagreement (Table 7). The strongest outcome is in relation to levels of trust in the TGA, where 85% of respondents Agree or Strongly agree with the statement. Perceptions of the international standing of the TGA are also strong (75% Nett agreement). Both of these measures show very low disagreement, with 5% or less disagreeing on each of the two measures.

Statements relating to proportionate risk management and the balance between risks and benefits also show relatively strong Nett agreement (69% and 71% respectively). These measures are, however, associated with slightly higher levels of Nett disagreement, at 12% for both measures.

Table 7: Reputation, trust and risk management

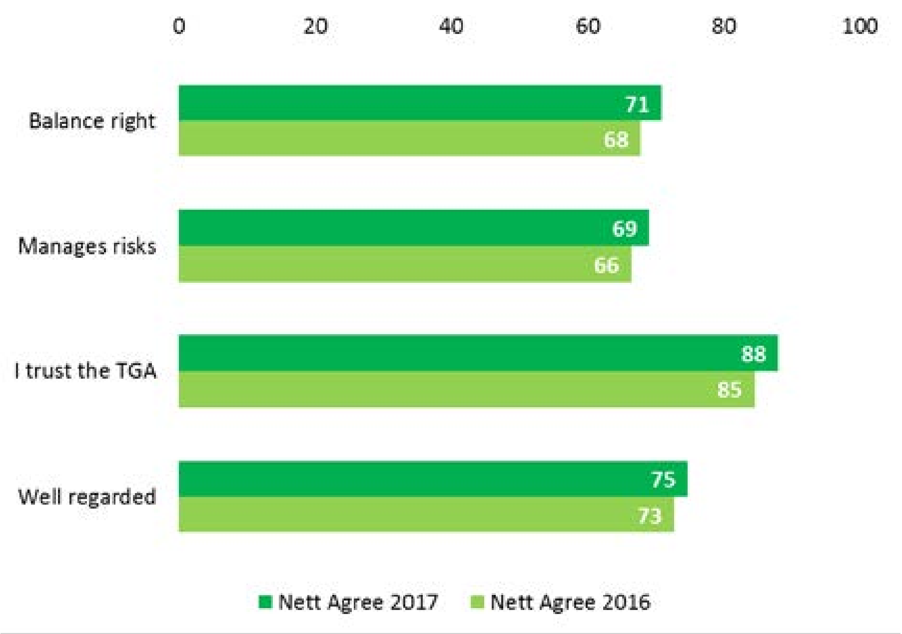
Please indicate your level of agreement with the following statements:									
Statement	Nett Disagree	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Nett Agree	NA/Not sure	N
Australia gets the balance right between the risks associated with therapeutic goods and their benefits	**12**	2	10	13	54	17	**71**	4	2519
The TGA manages risks proportionately	**12**	3	9	14	53	16	**69**	5	2511
I trust the TGA to perform its role ethically and with integrity	**5**	2	2	6	44	44	**88**	1	2515
The TGA is well regarded internationally	**4**	2	3	12	38	37	**75**	9	2513

The pattern of responses across the measures of reputation, trust and risk management are consistent with those observed in the 2016 survey. Positively, whilst the differences are small, there is a general trend toward higher levels of Nett agreement and Lower levels of Nett disagreement across all measures (Table 8 and Figure 7).

Table 8: Reputation, trust and risk management – 2016 vs 2017

Please indicate your level of agreement with the following statements:							
	2017			2016			
Statement	Nett Disagree	Neither	Nett Agree	Nett Disagree	Neither	Nett Agree	Change Nett agree
Balance right	**12**	13	**71**	**15**	13	**68**	3
Manages risks	**12**	14	**69**	**15**	15	**66**	3
I trust the TGA	**5**	6	**88**	**6**	9	**85**	3
Well regarded	**4**	12	**75**	**5**	13	**73**	2

Figure 7: Reputation, trust and risk management – 2016 vs 2017 Nett Agreement



N=2,511-2,519

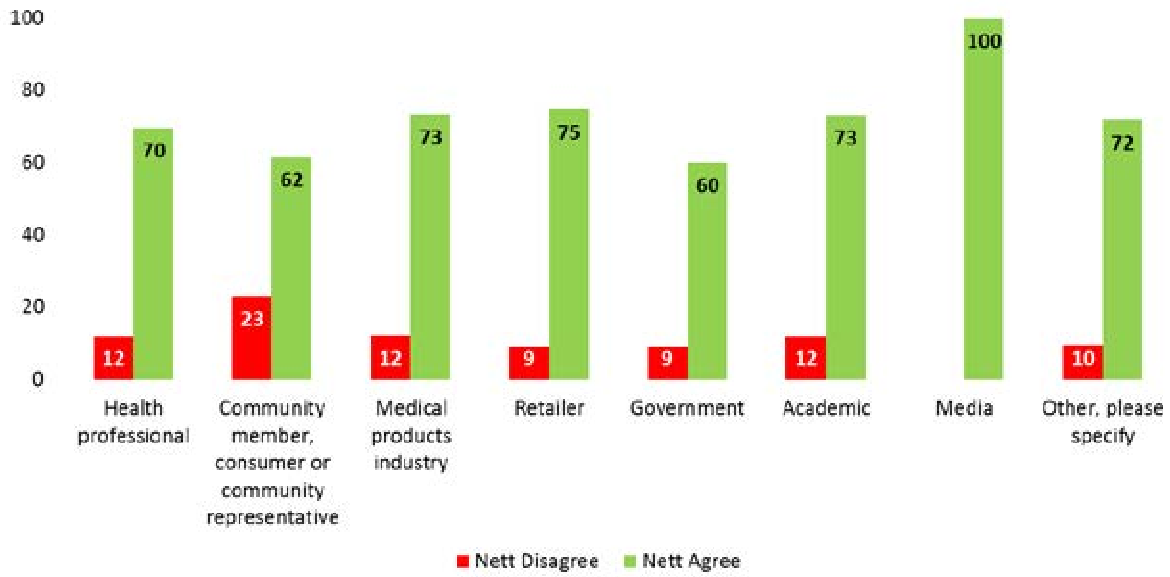
Across the range of measures here, there is a slight tendency for lower levels of agreement amongst Community member and Government based respondents (Figures 8-11). The exception to this amongst Government stakeholders is in relation to the trust focussed measure, where Government stakeholders highlighted 89% Nett agreement. For community members, low agreement levels often translated into higher levels of Nett disagreement, however the small number of respondents in this group means that these results should be interpreted with caution.

There is strong agreement and generally low levels of disagreement across Medical product industry, Health professional and Retailer groupings. Media stakeholders also showed strong agreement, however the very small number of respondents (n=2) in this category make these figures unreliable.

Getting the balance right

Retailers, Academics and Medical products industry stakeholders are most likely to identify agreement that TGA gets the balance right between the risks and benefits of therapeutic goods. Community members, consumers or community representatives and Government stakeholders show lower levels of Agreement on this measure, with 62% and 60% Nett agreement respectively. This low agreement is coupled with high levels of Nett disagreement amongst community members, however this pattern is not observed amongst government stakeholders, where disagreement is low (at 9%).

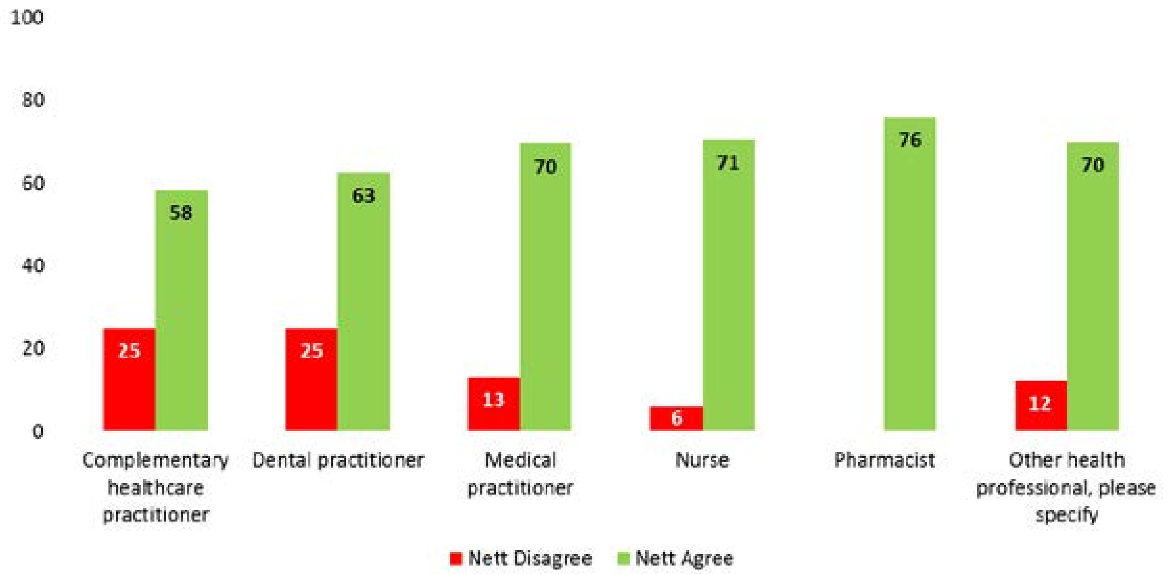
Figure 8: Gets the balance right by stakeholder group (%)



Health pro: N=215; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=344.

Within the Health professionals category there is marked variation, with Complementary healthcare practitioners (n=24; small sample size) and to a lesser extent Dental practitioners (n=8; very small sample size) showing generally lower levels of Nett agreement and higher levels of Nett disagreement than other groups (Figure 9).

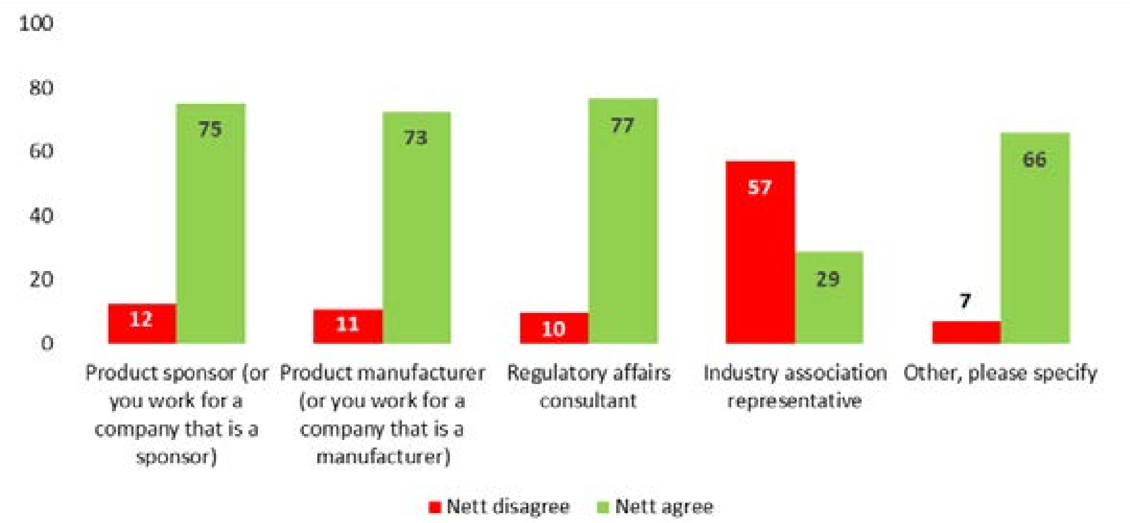
Figure 9: Gets the balance right – Health professionals (%)



Comp health: N=24; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=90.

Medical products industry participants are generally consistent in their view on this measure, with Nett agreement at or above 73% across Manufacturers, Sponsors and Regulatory affairs consultants. In contrast, the views of Industry association representatives (n=14; small sample) are far more negative on this measure and are the only group within all survey categories to show higher Nett disagreement (57%) compared to agreement (29%).

Figure 10: Gets the balance right – Medical products industry (%)



Sponsor: N=765; Manufacturer: N=397; Reg Affairs Con: N=115; Ind Assoc Rep: N=14; Other: N=44.

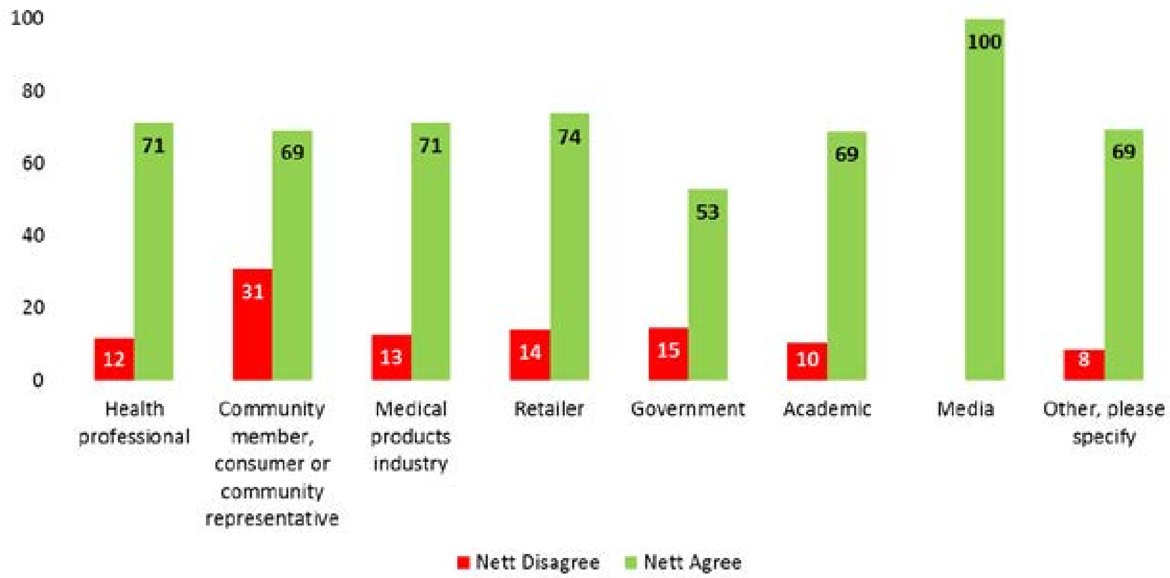
Managing risk

Agreement that the TGA manages risk proportionately is generally high across Retailer, Medical products industry Health professional, Academic and Community groups (Figure 11). Notably, whilst the level of nett agreement is strong for community members (69%), a substantial minority (31%) indicate disagreement on this statement.

The lowest levels of agreement on this measure are observed in relation to Government stakeholders (53%). However this did not translate into high levels of disagreement, with a low 10% of this group holding a negative view.

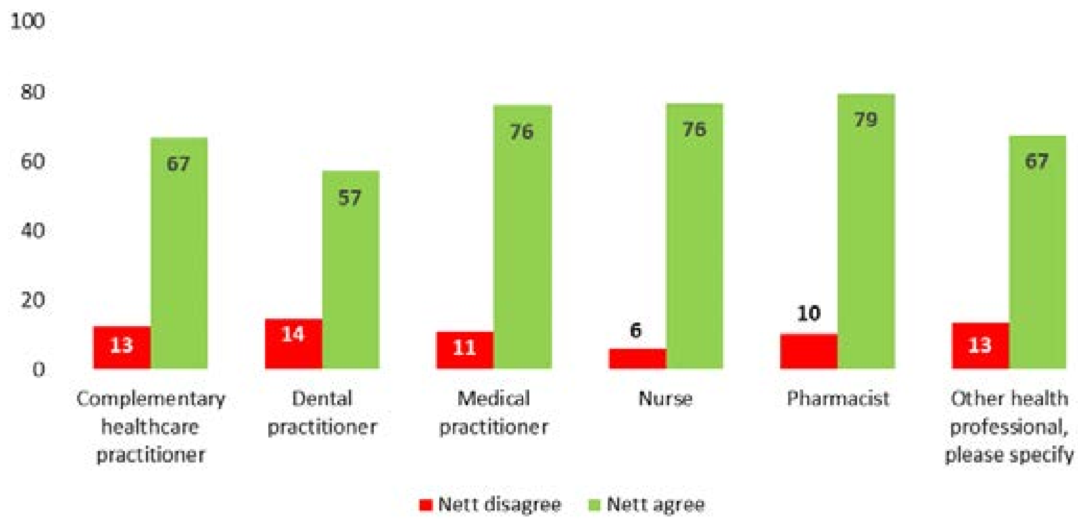
Within the Health professionals category, agreement tends to be lower amongst Complementary healthcare and Dental practitioners, although disagreement amongst these groups is similar to those in other health professional categories.

Figure 11: Manages risk by stakeholder group (%)



Health pro: N=215; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=344.

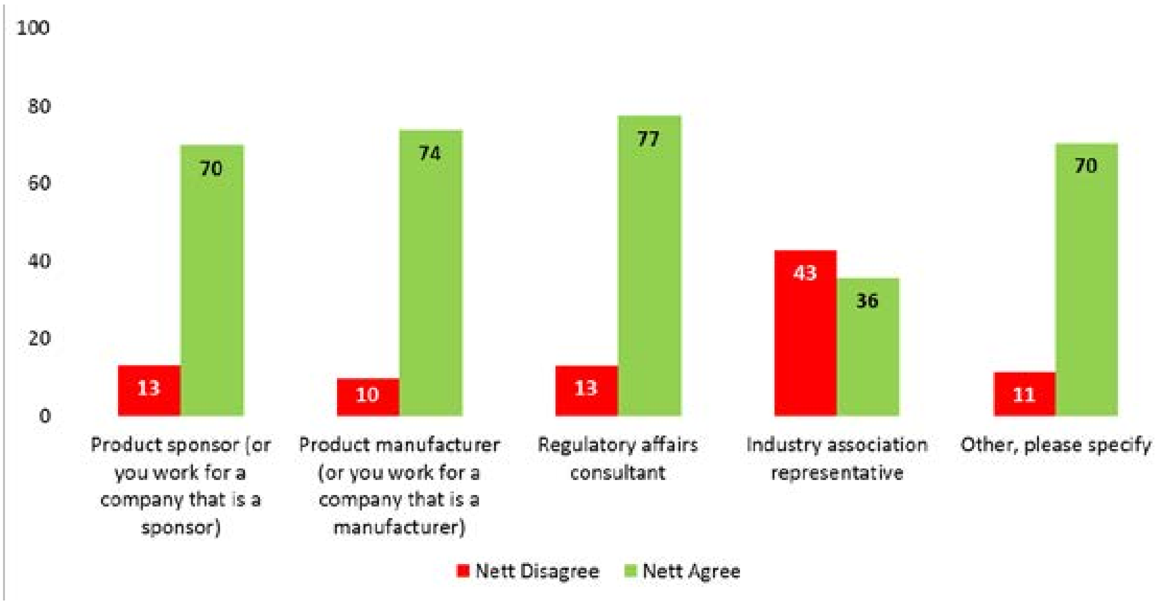
Figure 12: Manages risk – Health professionals (%)



Comp health: N=24; Dental: N=7; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=89.

Consistent with the pattern observed across this question set, participants in the medical products industry category hold generally positive views (Figure 13). The exception again is Industry association representatives (n=14; small sample), where Low agreement (36%) and high disagreement (43%) is evident.

Figure 13: Manages risk – Medical products industry (%)

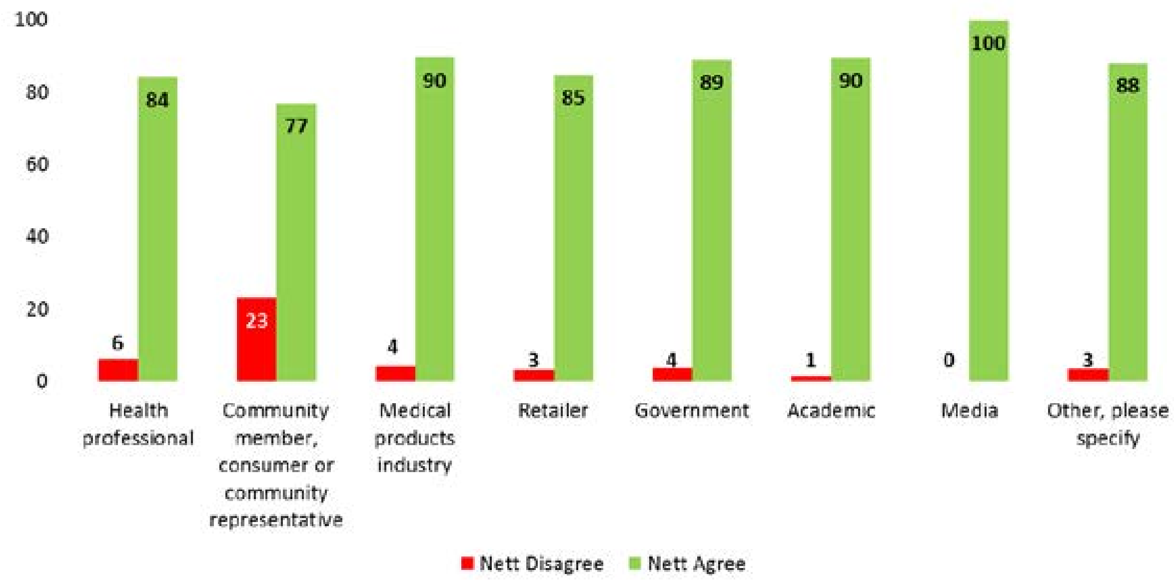


Sponsor: N=764; Manufacturer: N=396; Reg Affairs Con: N=115; Ind Assoc Rep: N=14; Other: N=44.

Trust in the TGA

Consistent with results in 2016, trust in the TGA is strong amongst all groupings in the survey, with more than seven in ten respondents across all of the major industry categories highlighting agreement that they trust the TGA to act ethically and with integrity (Figure 14). Agreement on this statement is particularly strong amongst those in the Medical products industry, Health professionals, Academics and Government categories. Community members highlight slightly lower agreement levels (77%) and a significant level of disagreement (23%) – although the sample size here is small.

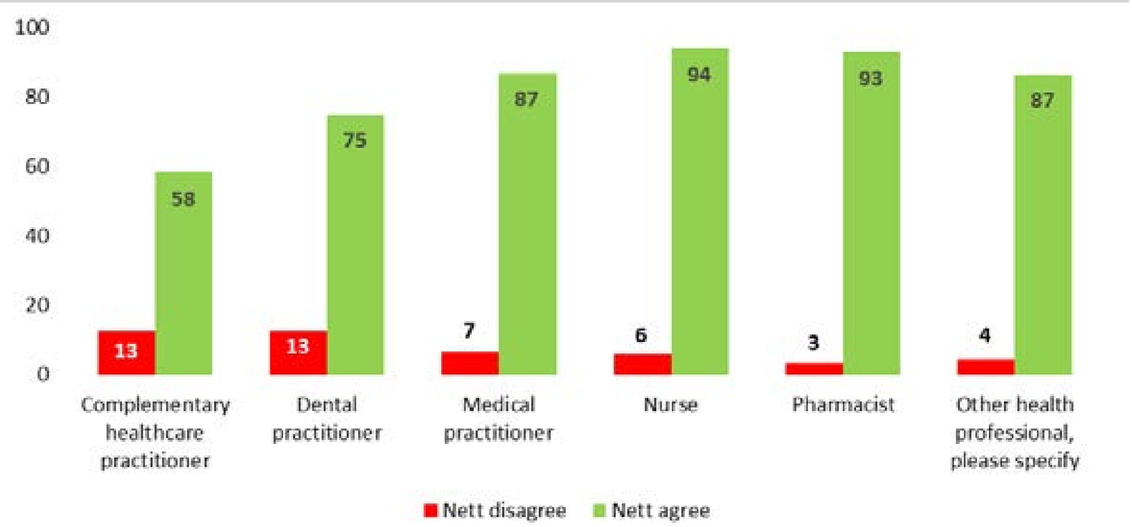
Figure 14: Trust in the TGA by stakeholder group (%)



Health pro: N=216; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=345.

Levels of trust are very high amongst industry stakeholders in the Medical practitioner, Nurse and Pharmacist categories. In contract, agreement was lower amongst Complementary Healthcare and dental practitioner categories (Figure 15).

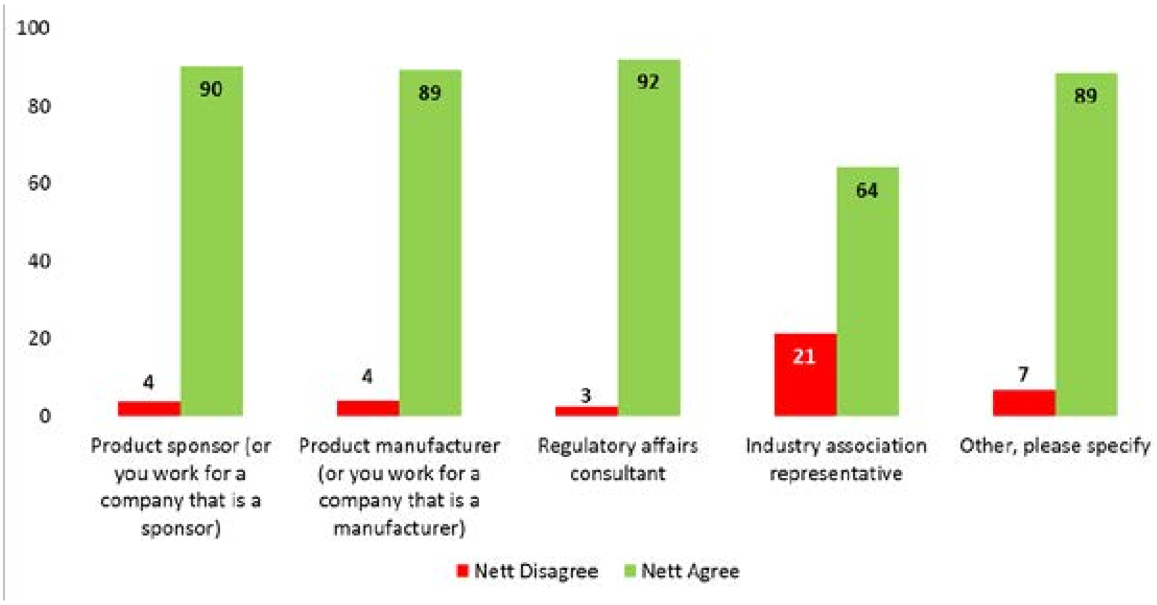
Figure 15: Trust in the TGA - Health professionals (%)



Comp health: N=24; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=89.

As with other questions in this grouping, Industry association representatives are less positive on the trust measure than other groups in the industry category (Figure 16).

Figure 16: Trust in the TGA – Medical products industry (%)

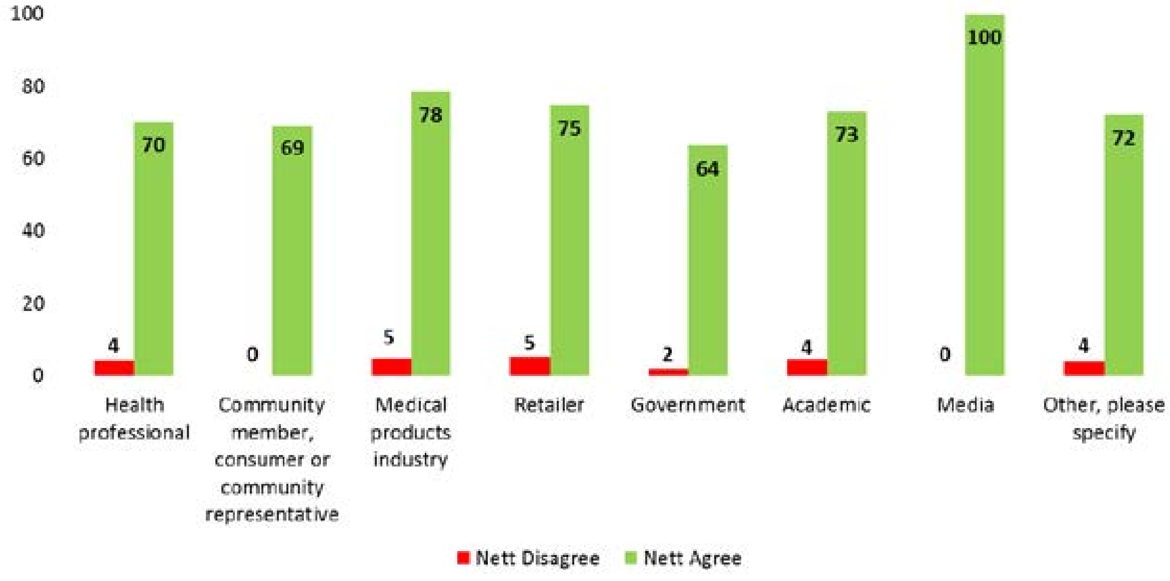


Sponsor: N=764; Manufacturer: N=396; Reg Affairs Con: N=115; Ind Assoc Rep: N=14; Other: N=44.

International reputation

Around three in four Medical products industry and Retailer respondents highlight agreement that the *TGA is well regarded internationally*. Government stakeholders are less positive, however they do not indicate higher levels of disagreement.

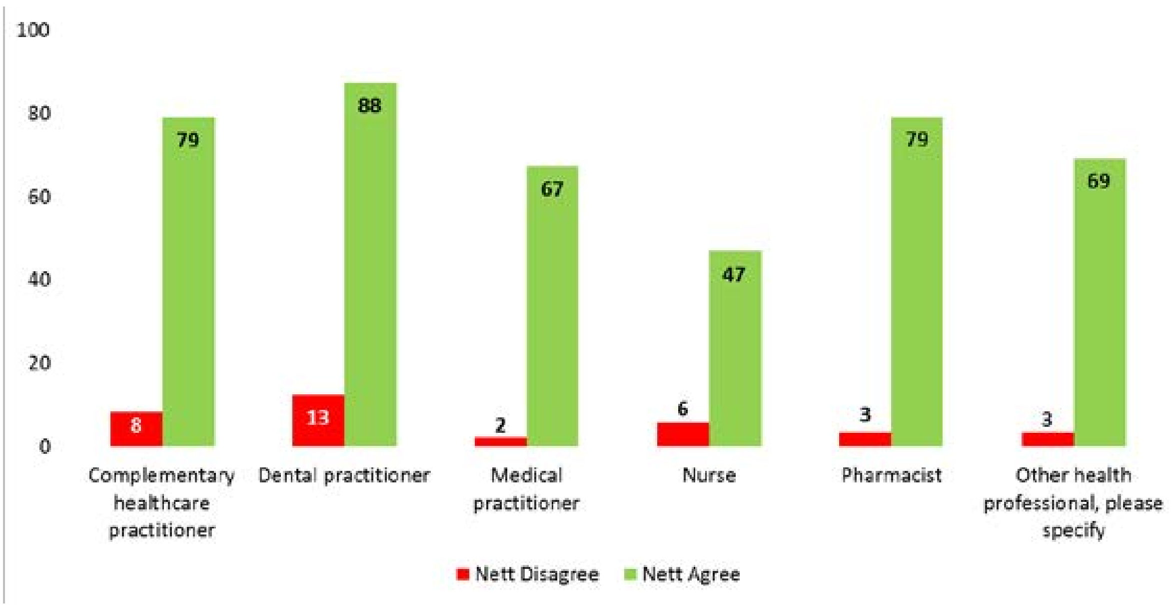
Figure 17: International reputation by stakeholder group (%)



Health pro: N=215; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=344.

In contrast to other questions in this set, Complementary healthcare and Dental practitioners show generally high levels of Nett agreement and low disagreement. Nurses and (to a lesser extent) Medical practitioners show relatively low agreement.

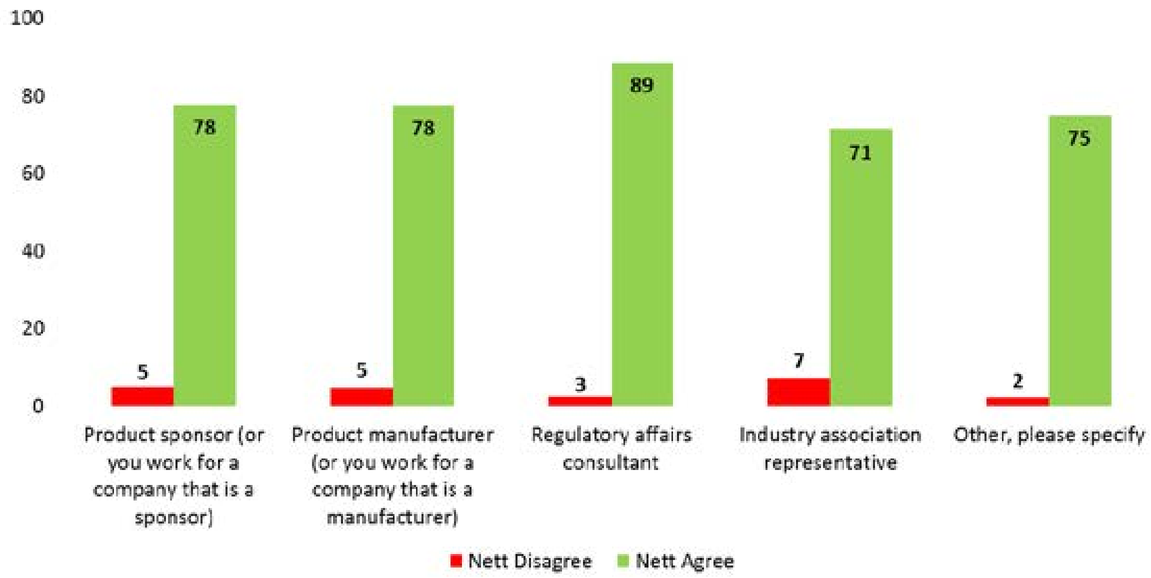
Figure 18: International reputation – Health professionals (%)



Comp health: N=24; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=88.

Agreement that the TGA is well regarded internationally across medical products industry categories is generally positive, ranging from 71% amongst Industry association representatives to 89% amongst regulatory affairs consultants. There is low disagreement across all categories here.

Figure 19: International reputation – Medical products industry (%)



Sponsor: N=764; Manufacturer: N=397; Reg Affairs Con: N=114; Ind Assoc Rep: N=14; Other: N=44.

Confidence in the TGA

Confidence in the TGA was measured across a range of focus areas. The strongest outcomes here are observed in relation to Trustworthiness and Providing safeguards for the health of Australians, where 7 in 10 respondents indicate either high or full confidence in the TGA and minimal numbers (around one in 20) indicate low or no confidence (Table 9).

Measures of Technical competence, Fairness, Risk management and Scientifically valid decisions all show similar levels of confidence, with around six in ten participants indicating high or full confidence across these measures and 11% or fewer respondents indicating low confidence.

The measure focussing on well thought out decision making shows lower levels of confidence, with half of the sample highlighting high levels of confidence in the TGA here, and 12% showing low or no confidence.

Table 9: Confidence in the TGA (%)

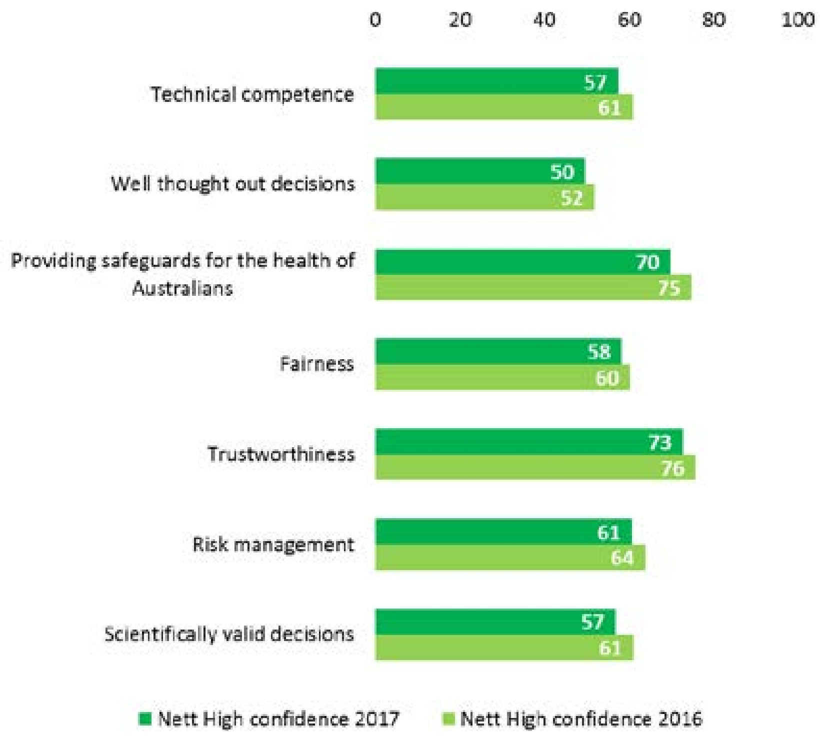
Please indicate your level of confidence in the TGA in the following areas:								
Statement	Nett Low confidence	Not at all confident	Low confidence	Moderate confidence	High confidence	Full confidence	Nett High confidence	N
Technical competence	**8**	2	6	34	48	9	**57**	2398
Well thought out decisions	**12**	3	9	39	42	7	**50**	2397
Providing safeguards for the health of Australians	**5**	2	4	25	54	16	**70**	2401
Fairness	**10**	3	7	31	48	11	**58**	2395
Trustworthiness	**5**	1	3	23	54	18	**73**	2394
Risk management	**8**	2	6	31	50	10	**61**	2398
Scientifically valid decisions	**11**	2	8	33	46	11	**57**	2398

The patterns observed in 2017 are almost identical to those observed in 2016. However there is a slight tendency toward lower levels of Nett high confidence. This does not translate to a trend toward higher levels of Nett low confidence, with low confidence levels generally at or just below those observed in 2016 (Table 10 and Figure 20).

Table 10: Confidence in the TGA (%)

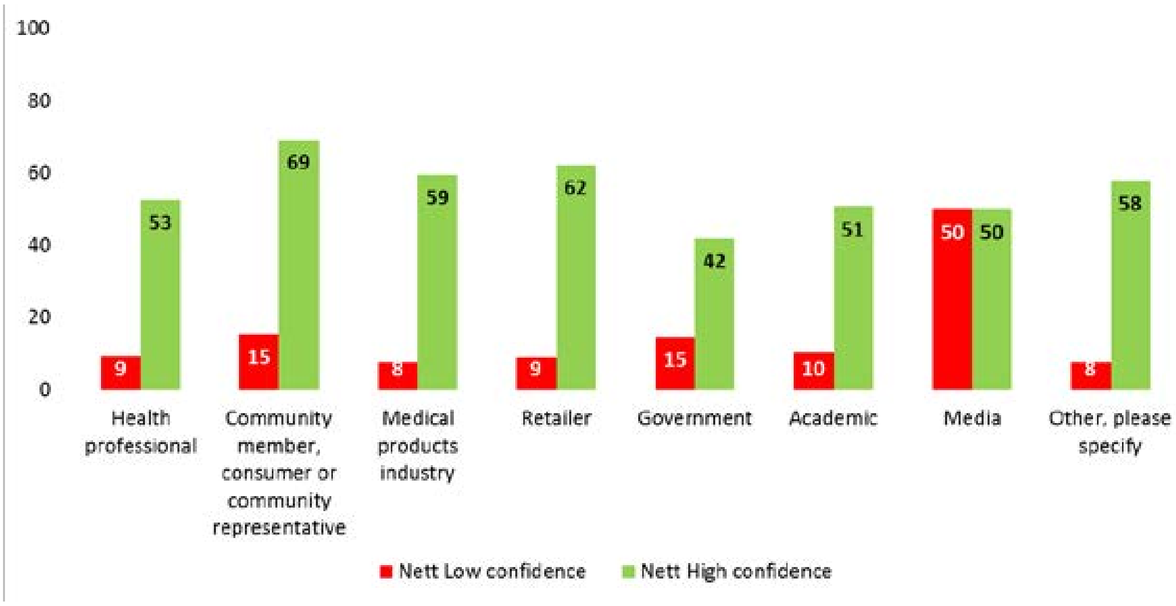
Please indicate your level of confidence in the TGA in the following areas:							
	2017			2016			
Statement	Nett Low confidence	Moderate confidence	Nett High confidence	Nett Low confidence	Moderate confidence	Nett High confidence	Change Nett High confidence
Technical competence	**8**	34	**57**	**12**	28	**61**	-3
Well thought out decisions	**12**	39	**50**	**15**	33	**52**	-2
Providing safeguards for the health of Australians	**5**	25	**70**	**6**	19	**75**	-5
Fairness	**10**	31	**58**	**12**	28	**60**	-2
Trustworthiness	**5**	23	**73**	**5**	19	**76**	-3
Risk management	**8**	31	**61**	**9**	27	**64**	-3
Scientifically valid decisions	**11**	33	**57**	**12**	28	**61**	-4

Figure 20: Confidence in the TGA – 2016 vs 2017 Nett confidence (%)



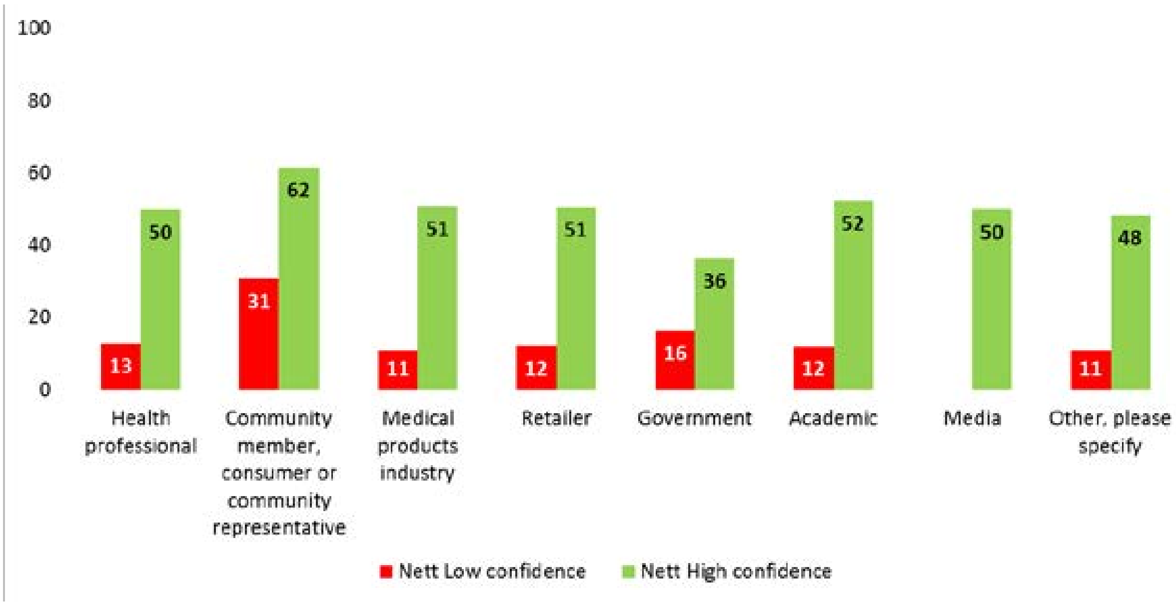
Responses across major stakeholder groupings (shown in Figures 21-27) highlight a general pattern where Community and Medical products industry stakeholders tend to consistently show strong levels of confidence. Those in the Government category show the lowest levels of confidence, whilst fluctuations are evident across measures in regards to Medical professional, Academic and Retailer groupings.

Figure 21: Technical competence – Confidence by Stakeholder category (%)



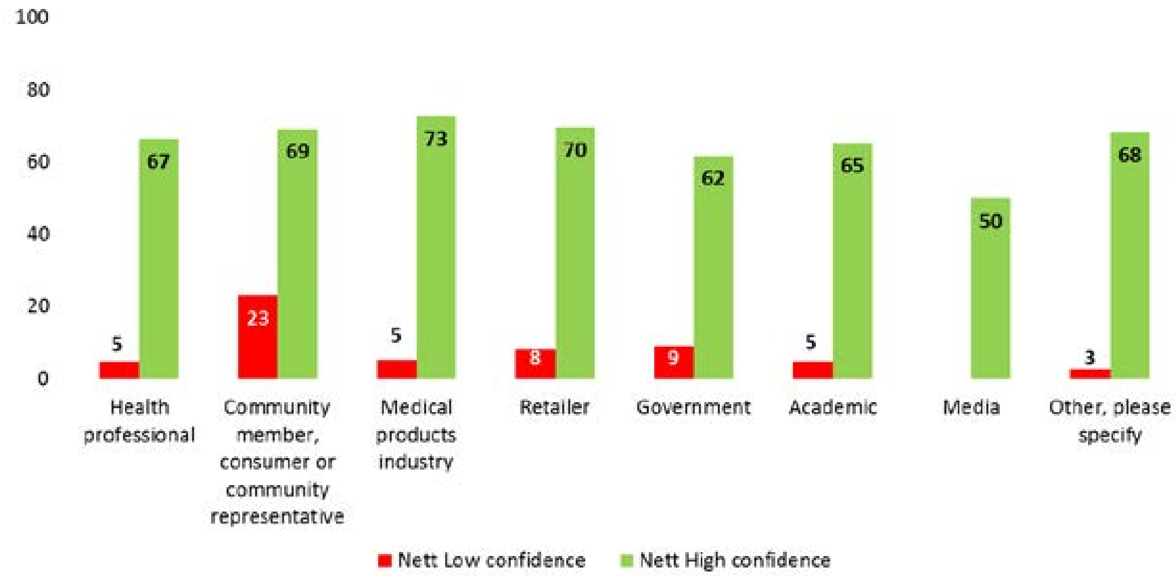
Health pro: N=217; Community: N=13; Med prod ind: N=1337; Retailer: N=98; Gov: N=55; Academic: N=67; Media: N=2; Other: N=342.

Figure 22: Well thought out decisions – Confidence by Stakeholder category (%)



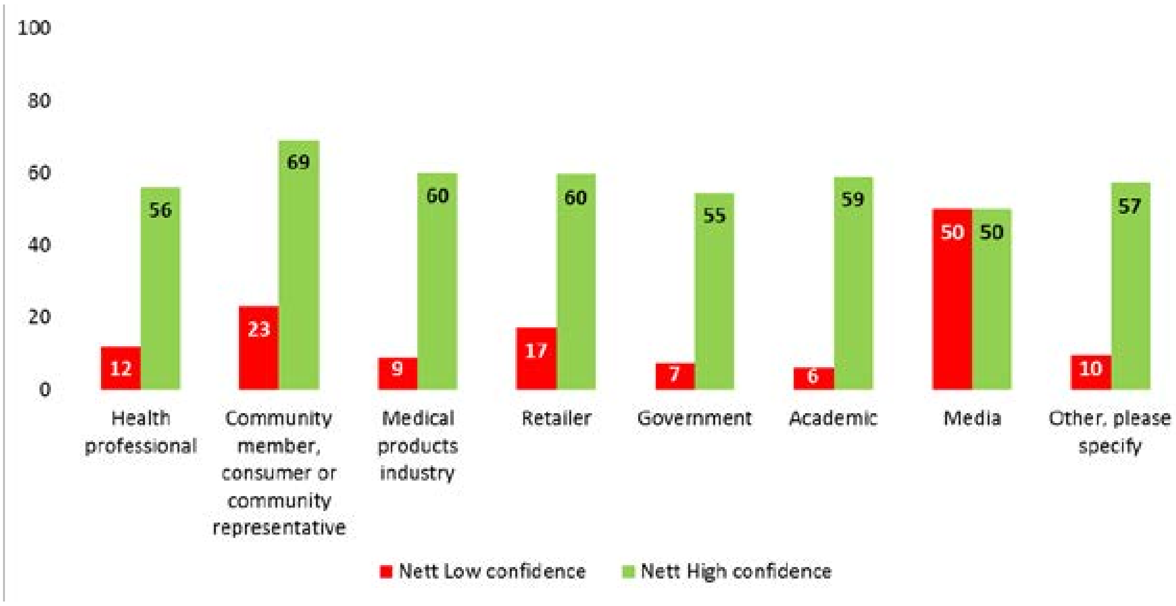
Health pro: N=217; Community: N=13; Med prod ind: N=1334; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=343.

Figure 23: Safeguards for the health of Australians – Confidence by Stakeholder category (%)



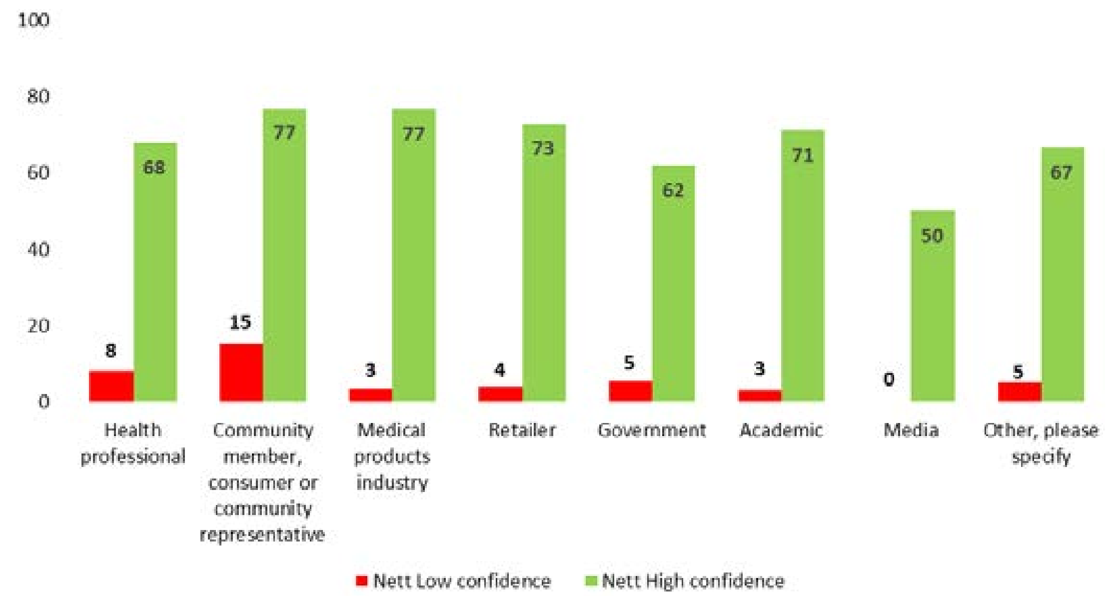
Health pro: N=218; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=55; Academic: N=66; Media: N=2; Other: N=342.

Figure 24: Fairness – Confidence by Stakeholder category (%)



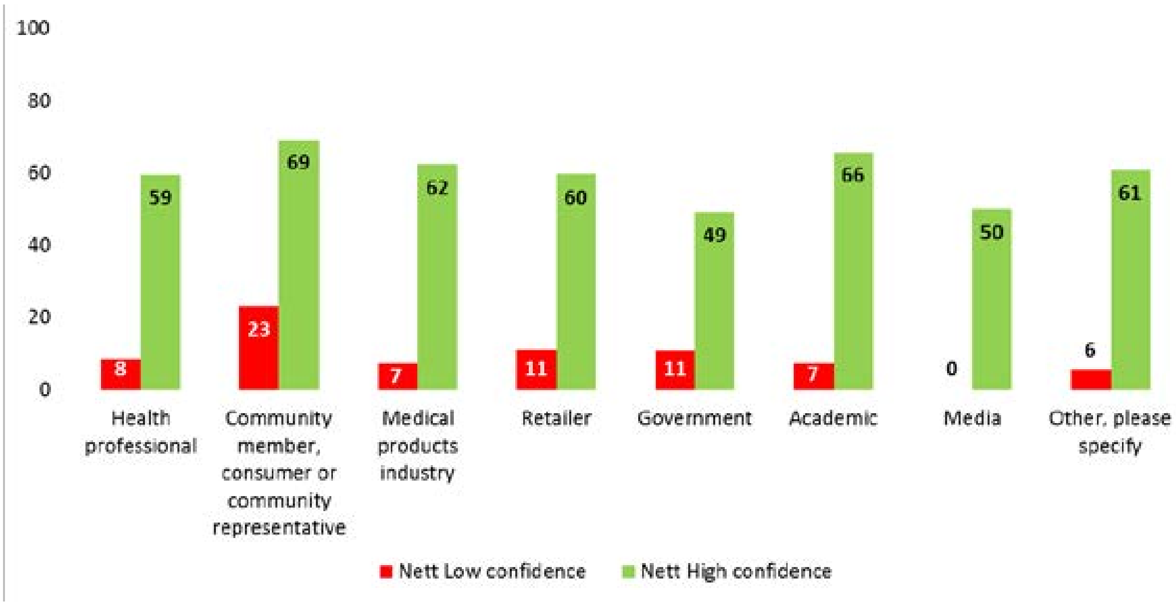
Health pro: N=218; Community: N=13; Med prod ind: N=1338; Retailer: N=99; Gov: N=55; Academic: N=66; Media: N=2; Other: N=343.

Figure 25: Trustworthiness – Confidence by Stakeholder category (%)



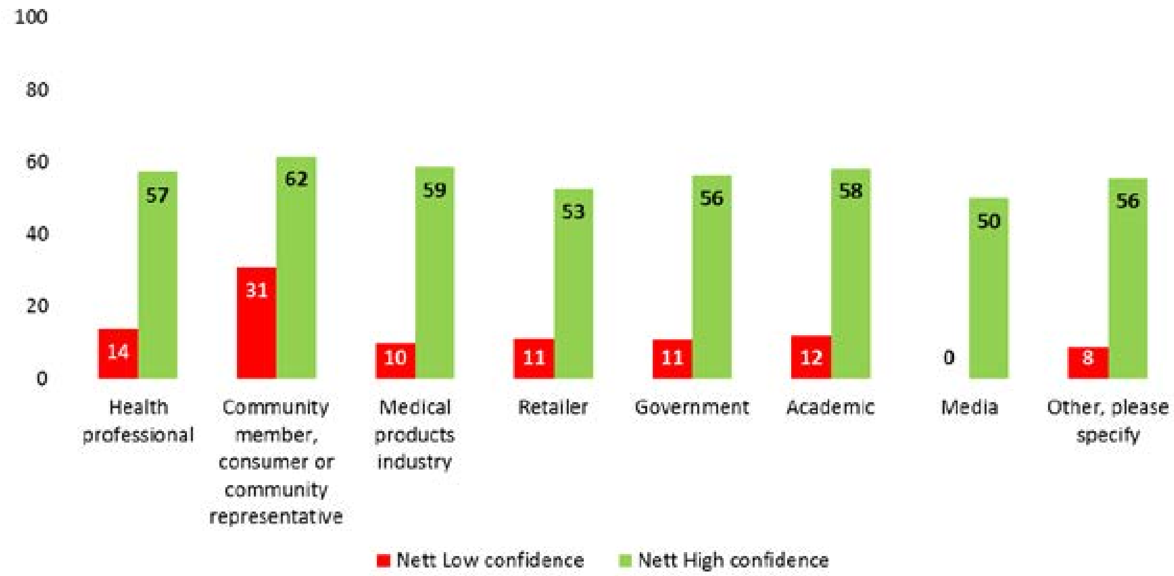
Health pro: N=217; Community: N=13; Med prod ind: N=1334; Retailer: N=99; Gov: N=55; Academic: N=66; Media: N=2; Other: N=343.

Figure 26: Risk management – Confidence by Stakeholder category (%)



Health pro: N=217; Community: N=13; Med prod ind: N=1337; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=342.

Figure 27: Scientifically valid – Confidence by Stakeholder category (%)



Health pro: N=217; Community: N=13; Med prod ind: N=1336; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=342.

Table 11 shows confidence levels within the health professional grouping. Outcomes here show a notable tendency for higher confidence within the Medical practitioner group and generally fewer responses showing high confidence within the complementary healthcare practitioner category. Dental practitioners, Nurses and Pharmacists show fluctuations across measures. The small sample sizes here (particularly amongst dental practitioners) increase the likelihood of observing large fluctuations within these groups.

Table 11: Confidence in the TGA – Health professionals (%)

Health professional	Technical competence		Well thought out decisions		Providing safeguards for the health of Australians		Fairness	
	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence
Complementary healthcare practitioner	13	29	29	25	13	42	33	25
Dental practitioner	13	50	13	38	13	63	13	75
Medical practitioner	11	61	9	63	4	70	11	61
Nurse	6	47	6	41	0	76	6	65
Pharmacist	10	62	10	59	3	72	17	55
Other	7	53	13	50	3	69	7	58

Health professional	Trustworthiness		Risk management		Scientifically valid decisions	
	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence
Complementary healthcare practitioner	35	26	13	42	21	38
Dental practitioner	25	75	25	38	29	29
Medical practitioner	4	78	9	65	13	65
Nurse	0	65	0	53	6	71
Pharmacist	10	72	10	72	7	76
Other	3	72	7	58	15	52

Comp health prac: N=23-24; Dental: N=7-8; Medical prac: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=88-89.

Amongst stakeholders in the medical products industry there is a strong pattern highlighting lower levels of confidence amongst Industry association representatives (Table 12). The small number of stakeholders in this group show consistently fewer ratings of High confidence as well as the highest likelihood of providing Low confidence ratings. Both Product sponsors and Product manufacturers show generally similar views and are generally likely to show confidence levels at or just above the overall survey average. Regulatory affairs consultants show strong variation across measures, providing positive ratings In relation to Trustworthiness and Providing safeguards for Australians and generally low ratings in relation to Well thought out decisions.

Table 12: Confidence in the TGA – Medical products industry (%)

Role in Medical products industry	Technical competence		Well thought out decisions		Providing safeguards for the health of Australians		Fairness	
	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence	Nett Low confidence	Nett High confidence
Product sponsor	7	57	12	50	5	72	10	60
Product manufacturer	8	64	9	55	6	74	7	60
Regulatory affairs consultant	6	58	8	45	3	81	10	62
Industry association	29	29	29	7	14	36	21	21
Other	7	67	7	60	2	81	5	70

Role in Medical products industry	Trustworthiness: Nett Low confidence	Trustworthiness: Nett High confidence	Risk management: Nett Low confidence	Risk management: Nett High confidence	Scientifically valid decisions: Nett Low confidence	Scientifically valid decisions: Nett High confidence
Product sponsor	3	77	6	61	9	58
Product manufacturer	3	75	8	65	11	60
Regulatory affairs consultant	4	83	9	67	10	61
Industry association	14	50	43	7	21	14
Other	2	91	7	65	9	65

Sponsor: N=763-765; Manufacturer: N=393-396; Reg Affairs Con: N=114-115; Ind Assoc Rep: N=14; Other: N=43.

Collaboration, consultation and feedback

As was the case in 2016, measures of collaboration, consultation and feedback show less positive outcomes when compared to other focus areas in the survey. Measures consistently show Agreement levels at around half of the sample and disagreement at or well above 10% (Table 13).

The strongest outcome here continues to be in relation to the ability to provide feedback, with 68% agreeing (up from 62% in 2016) that they are able to do this and 10% disagreeing (2016 14%).

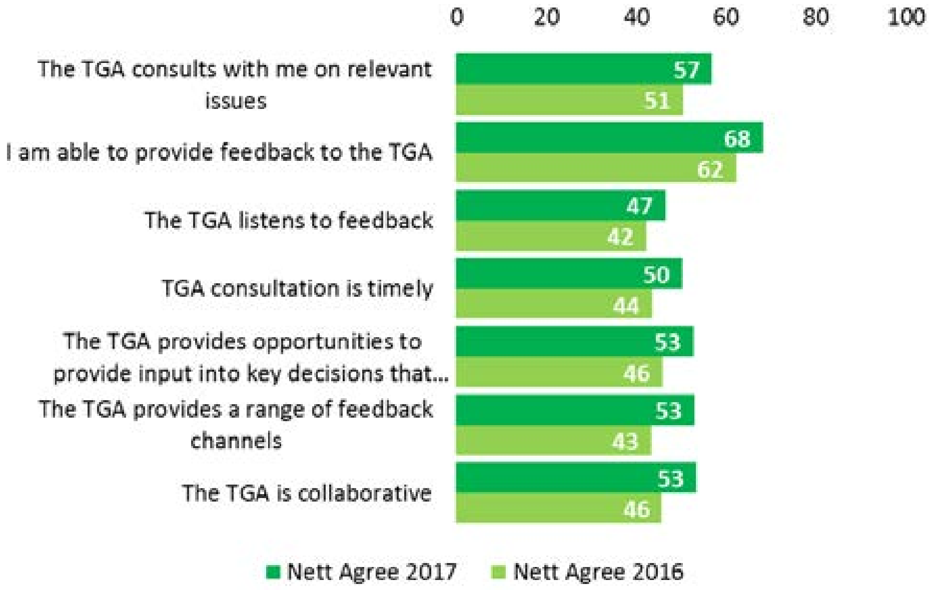
Table 13: Collaboration, consultation and feedback (%)

Statement	Nett Disagree	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Nett Agree	NA/ Not sure	N
The TGA consults with me on relevant issues	**14**	4	10	22	40	17	**57**	8	2347
I am able to provide feedback to the TGA	**10**	2	7	16	47	21	**68**	6	2344
The TGA listens to feedback	**13**	3	10	29	33	13	**47**	11	2341
TGA consultation is timely	**17**	4	13	26	37	13	**50**	7	2333
The TGA provides opportunities to provide input into key decisions that impact me	**15**	4	11	24	38	14	**53**	8	2340
The TGA provides a range of feedback channels	**13**	3	10	26	39	14	**53**	8	2347
The TGA is collaborative	**15**	4	11	26	39	15	**53**	6	2345

Across the measures here there is a strong trend toward more positive outcomes indicated by both increasing levels of Nett agreement and falling levels of Nett disagreement. This trend is evident across all statements, with increases in Nett agreement of between 5% and 10%. Of particular note is the strong rise in the range of feedback channels available (rising from 43% to 53% in 2017), Opportunities to provide input into key decisions (46% rising to 53%) and the Ability to provide feedback (rising from 62% to 68% Nett agreement).

Despite the overall positive trends, a number of opportunities for improvement across these measures continue to be evident. Most notably, building on the improvements achieved in relation to a focus on ensuring that feedback is listened to and acknowledged, ensuring consultation processes are timely and working to further promote and provide opportunities for input and feedback, including through a range of feedback channels, will be of benefit.

Figure 28: Collaboration, consultation and feedback – 2016 vs 2017 (%)



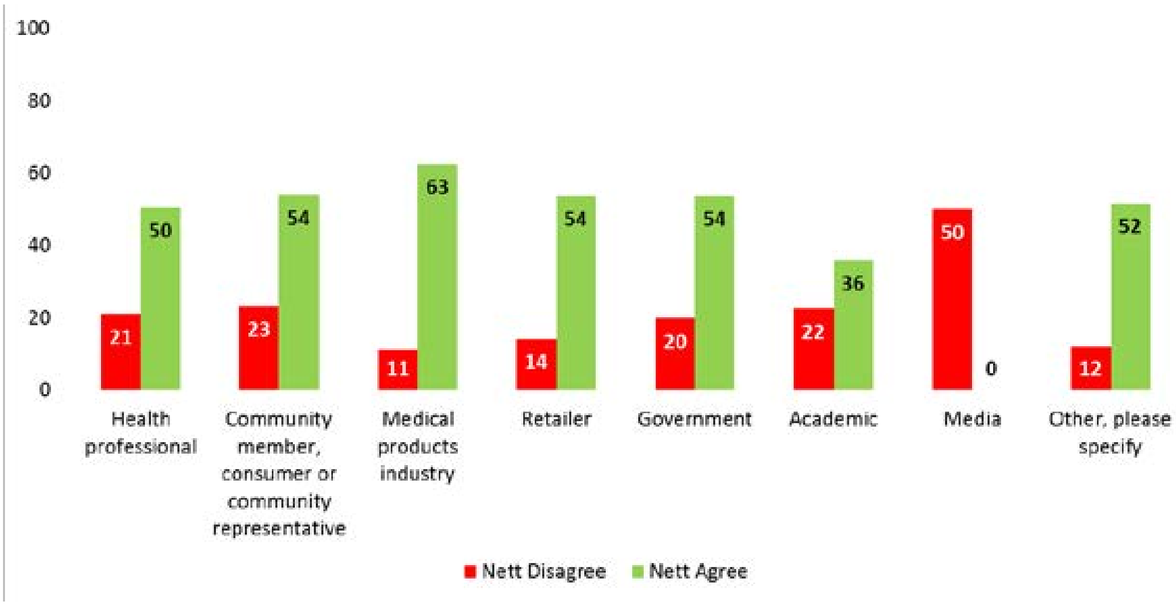
At the broadest stakeholder category, there is generally higher agreement amongst Medical products industry, Health professionals and (to a lesser extent) Community members. Government and Academic stakeholders show generally lower outcomes with lower results on measures of listening to feedback, timeliness of consultation, the range of feedback channels, providing opportunities for input and collaboration. An exception here is strong results relating to the Ability to provide feedback and mixed results across Consultation on relevant issues.

As with other question sets, there is a strong pattern evident in relation to divergent views within the Medical products industry category. The views of Industry association representatives across all measures are far more negative than other sub-groups in this category.

Figures 29-49 show detailed breakdowns across each question amongst the broad stakeholder categories as well as Health professional and Medical products industry sub-groups.

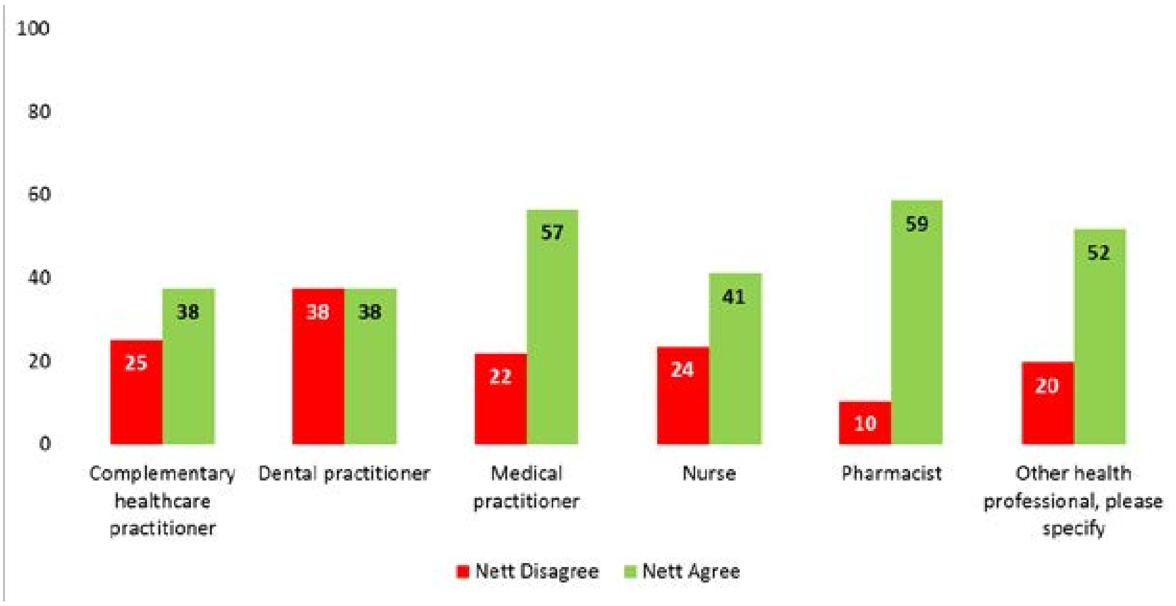
TGA consults me on relevant issues

Figure 29: TGA consults me on relevant issues by Stakeholder category



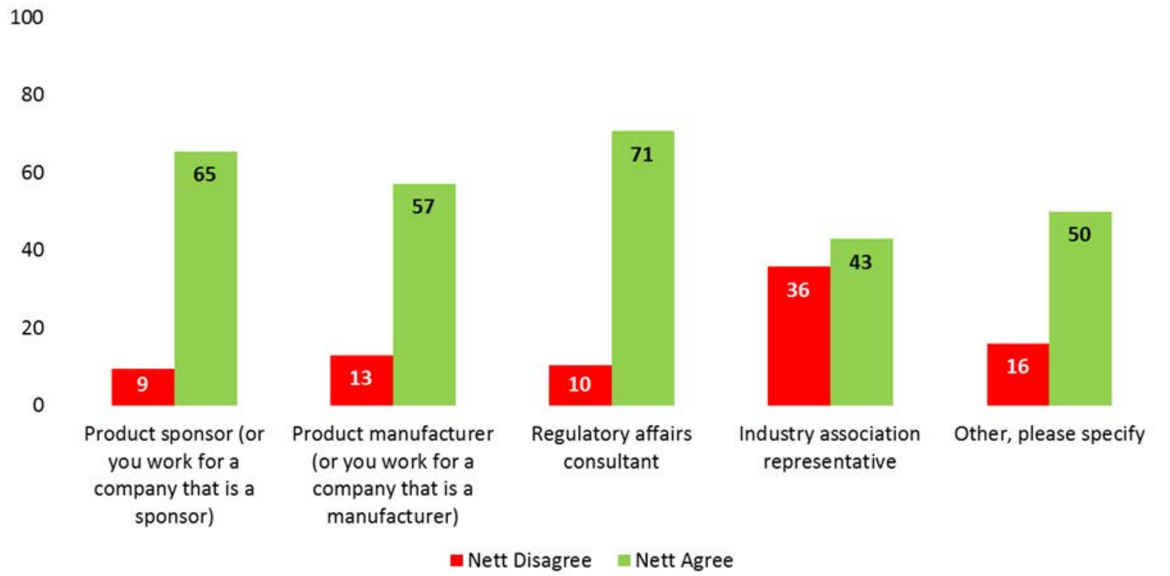
Health pro: N=220; Community: N=13; Med prod ind: N=1340; Retailer: N=99; Gov: N=56; Academic: N=67; Media: N=2; Other: N=345.

Figure 30: TGA consults me on relevant issues - Health professionals (%)



Comp health: N=24; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

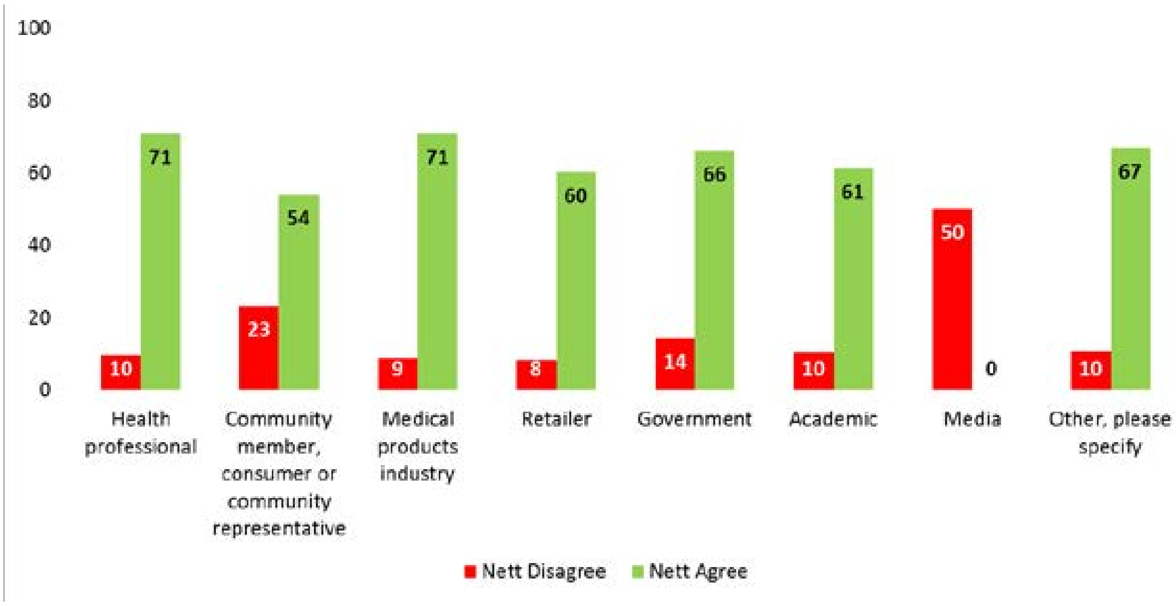
Figure 31: TGA consults me on relevant issues – Medical products industry (%)



Sponsor: N=763; Manufacturer: N=397; Reg Affairs Con: N=116; Ind Assoc Rep: N=14; Other: N=44.

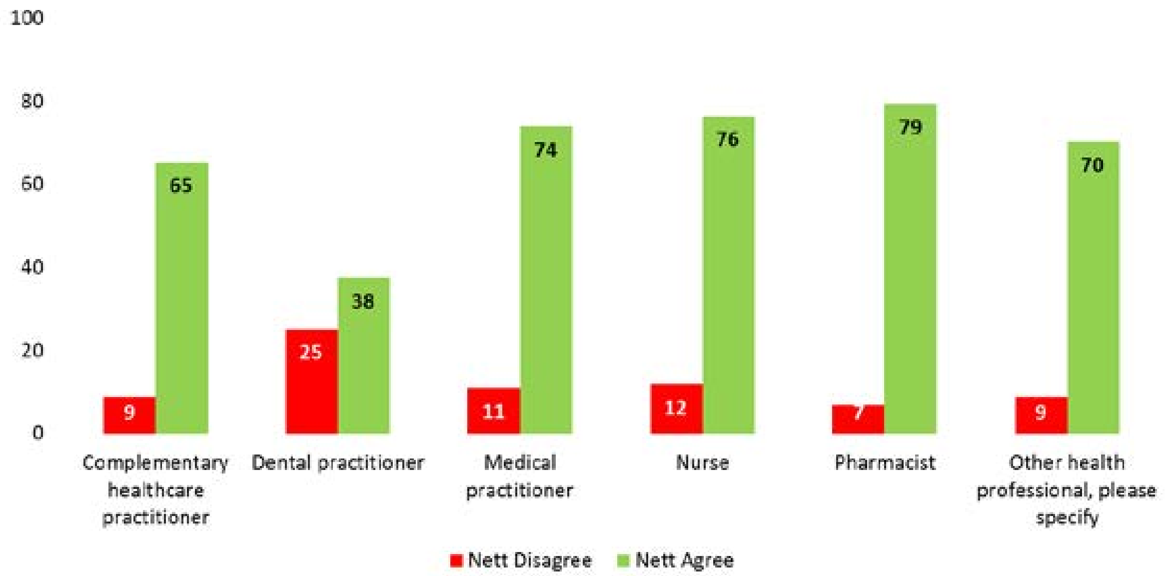
I am able to provide feedback to the TGA

Figure 32: I am able to provide feedback to the TGA by Stakeholder category (%)



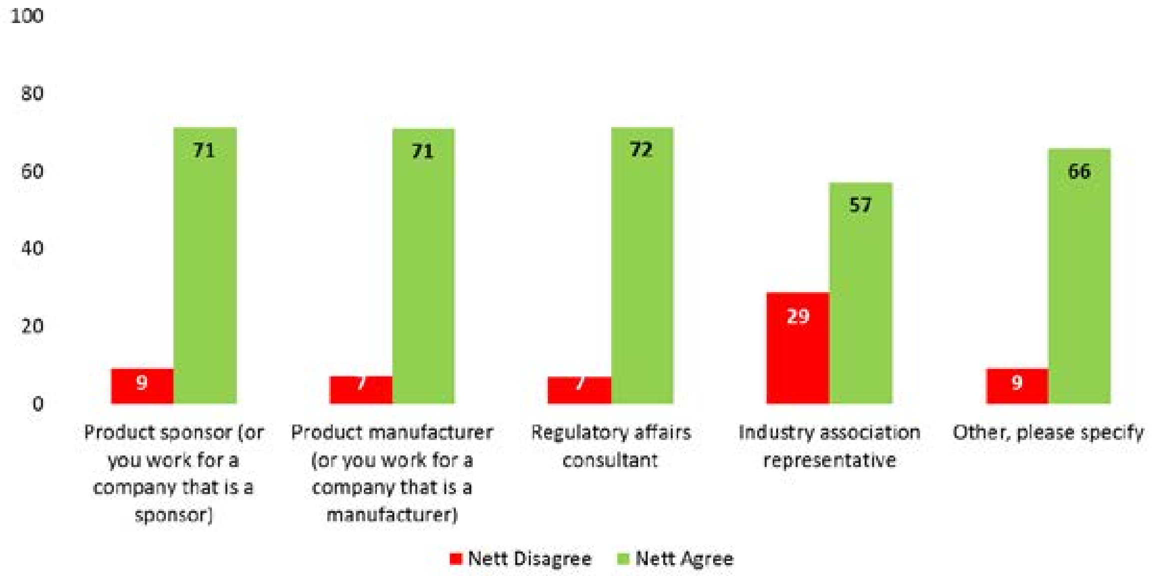
Health pro: N=219; Community: N=13; Med prod ind: N=1341; Retailer: N=98; Gov: N=56; Academic: N=67; Media: N=2; Other: N=344.

Figure 33: I am able to provide feedback to the TGA - Health professionals (%)



Comp health: N=23; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

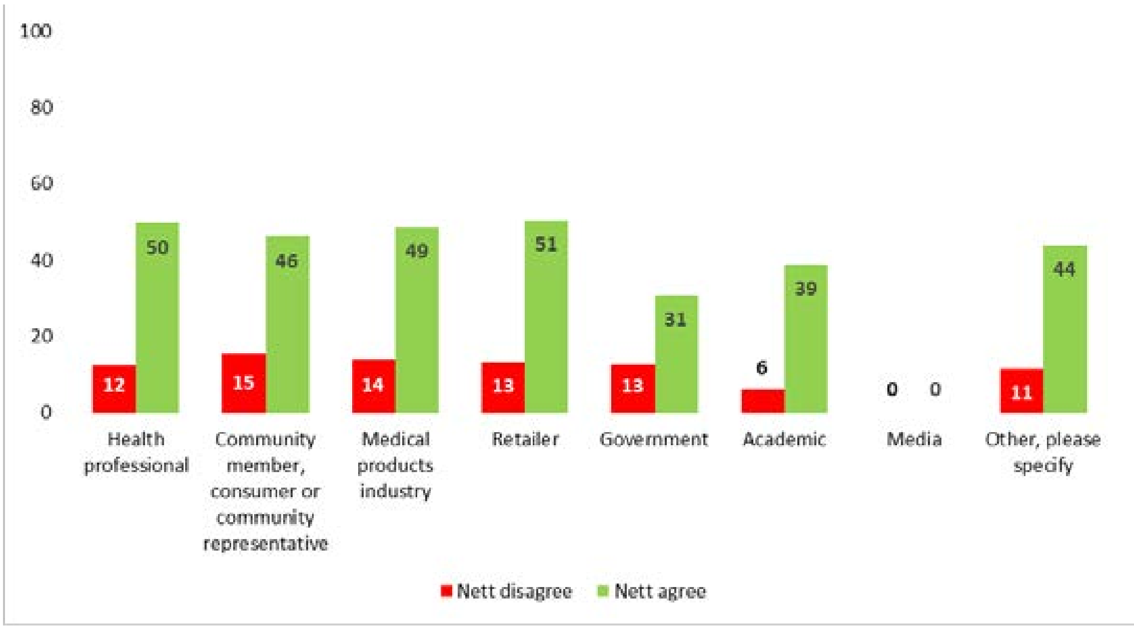
Figure 34: I am able to provide feedback to the TGA – Medical products industry (%)



Sponsor: N=764; Manufacturer: N=397; Reg Affairs Con: N=116; Ind Assoc Rep: N=14; Other: N=44.

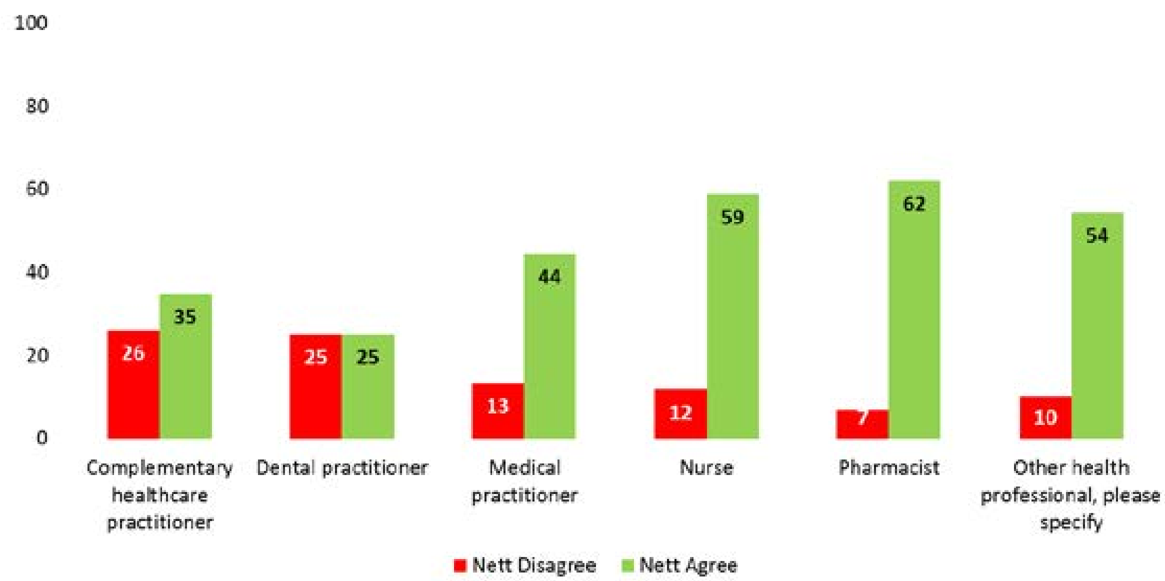
TGA listens to feedback

Figure 35: TGA listens to feedback by Stakeholder category (%)



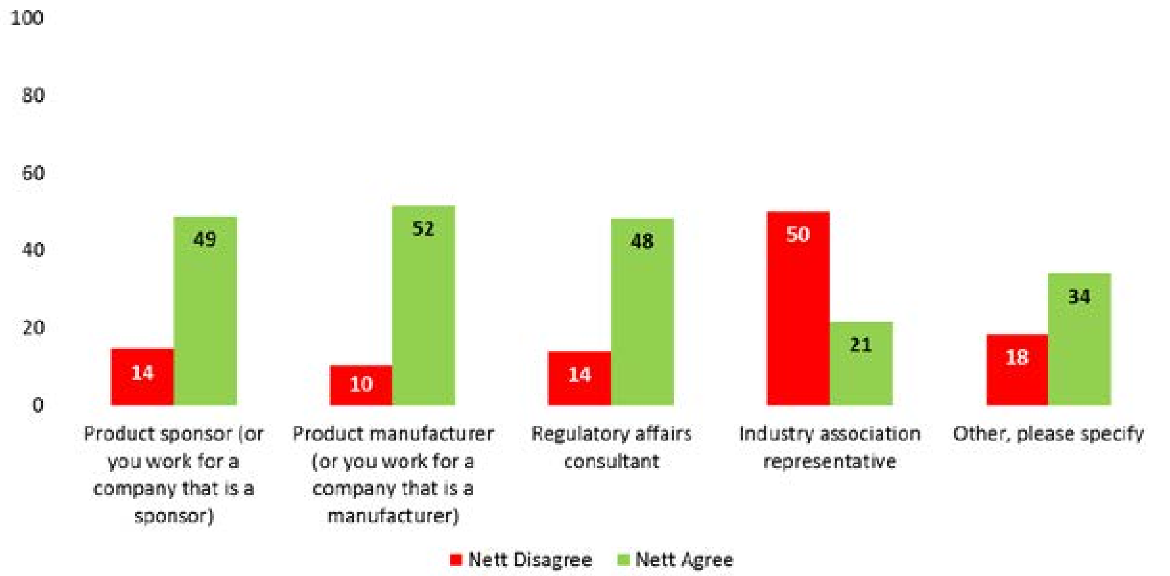
Health pro: N=217; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=55; Academic: N=67; Media: N=2; Other: N=344.

Figure 36: TGA listens to feedback - Health professionals (%)



Comp health: N=23; Dental: N=8; Med pro: N=45; Nurse: N=17; Pharmacist: N=29; Other: N=90.

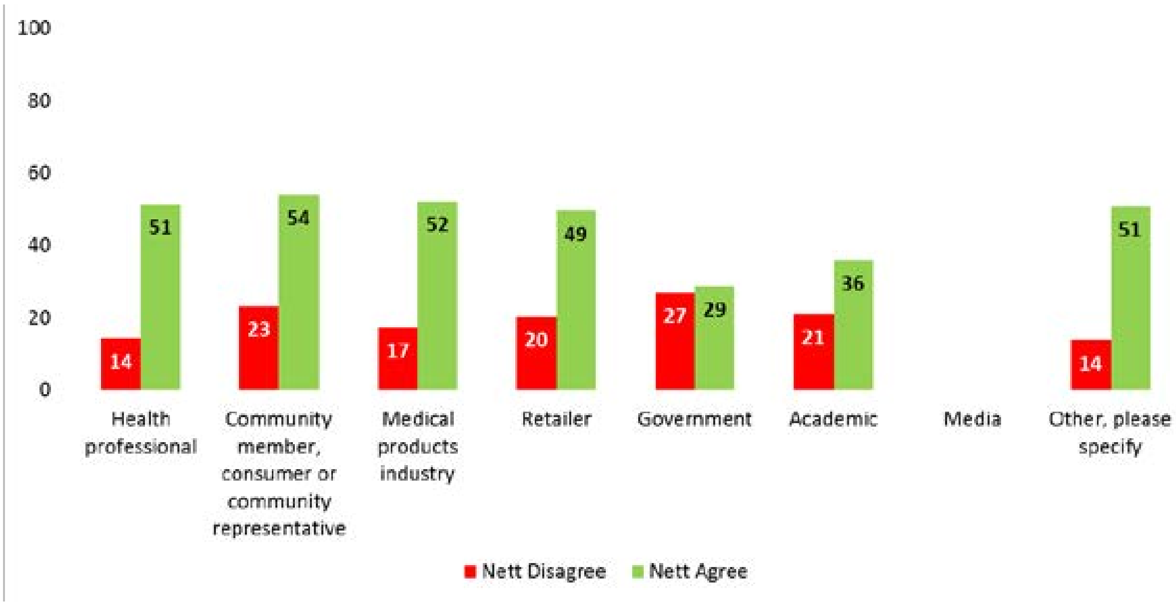
Figure 37: TGA listens to feedback - Medical products industry (%)



Sponsor: N=762; Manufacturer: N=397; Reg Affairs Con: N=116; Ind Assoc Rep: N=14; Other: N=44.

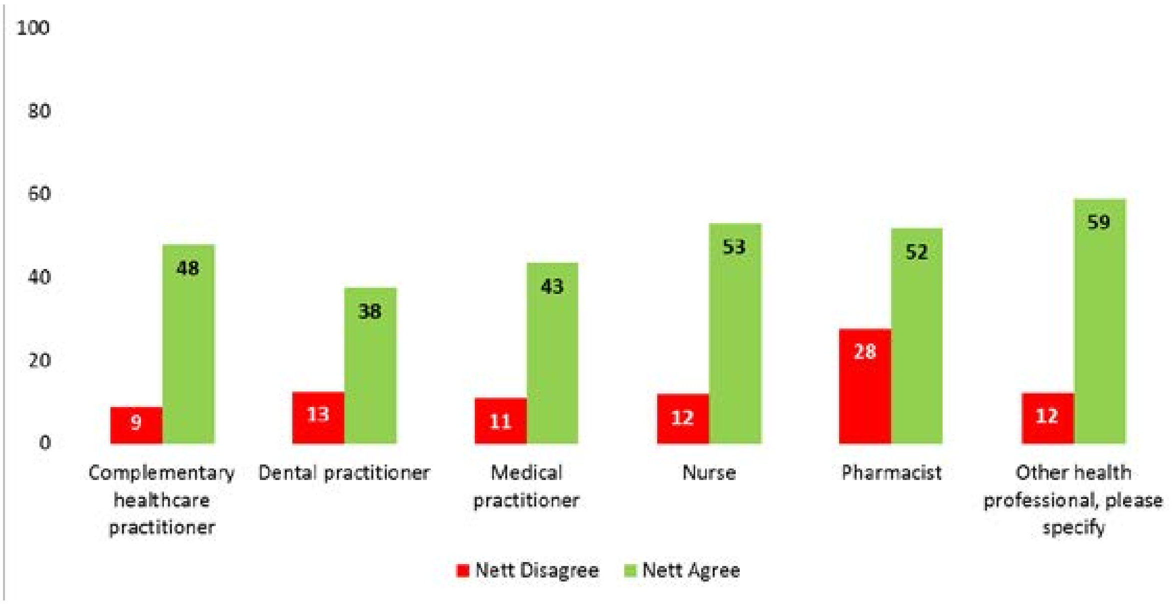
TGA consultation is timely

Figure 38: TGA consultation is timely by Stakeholder category (%)



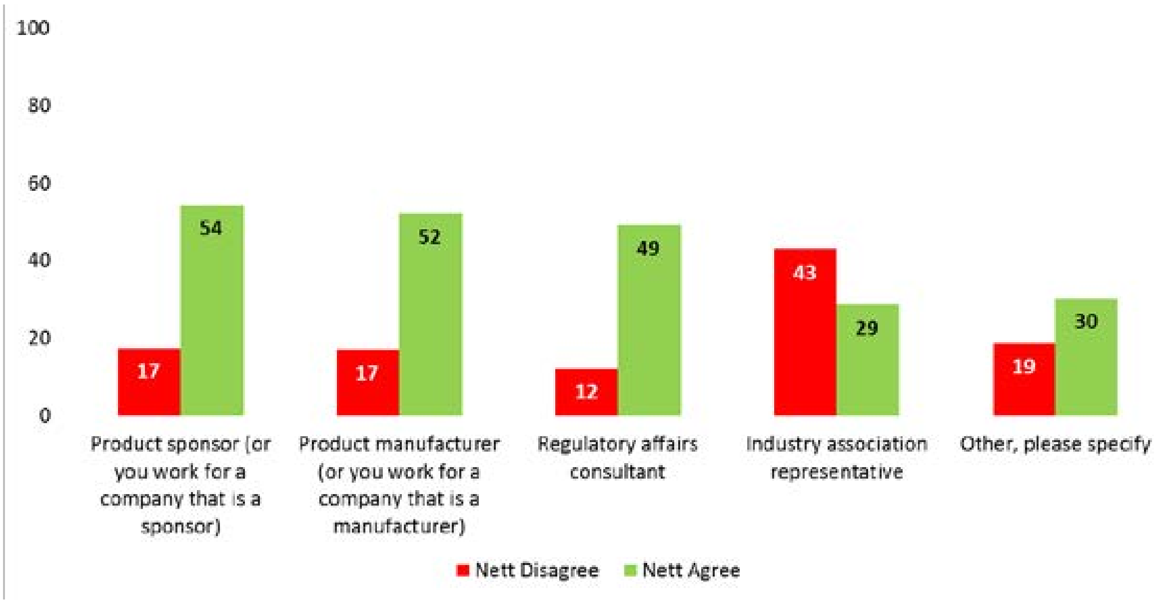
Health pro: N=218; Community: N=13; Med prod ind: N=1335; Retailer: N=99; Gov: N=56; Academic: N=67; Media: N=0; Other: N=341.

Figure 39: TGA consultation is timely - Health professionals (%)



Comp health: N=23; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=90.

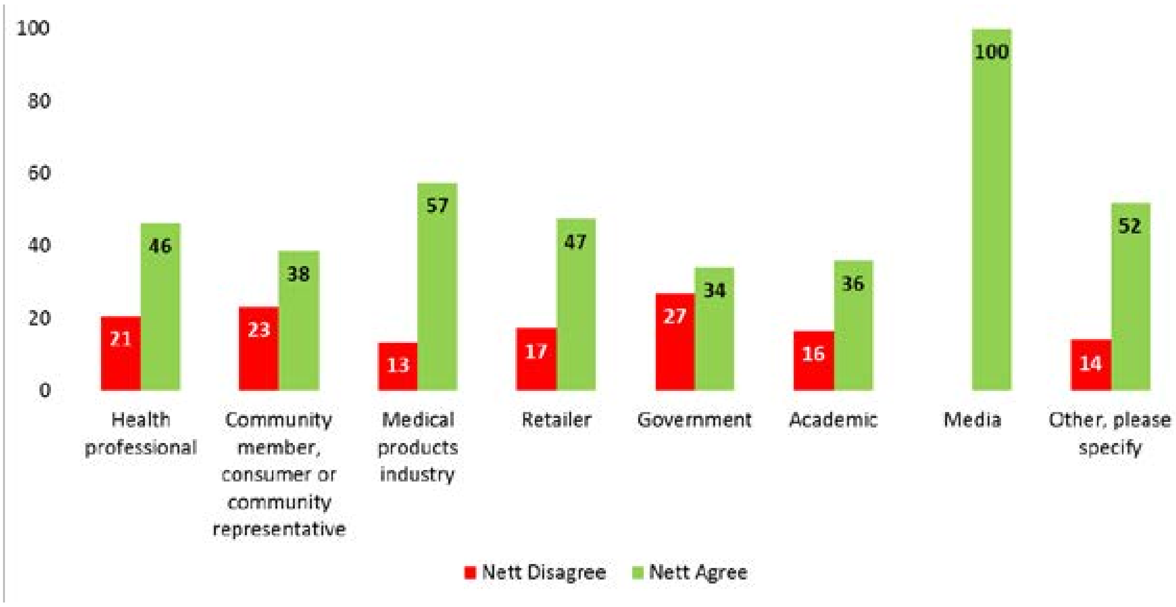
Figure 40: TGA consultation is timely - Medical products industry (%)



Sponsor: N=761; Manufacturer: N=395; Reg Affairs Con: N=116; Ind Assoc Rep: N=14; Other: N=43.

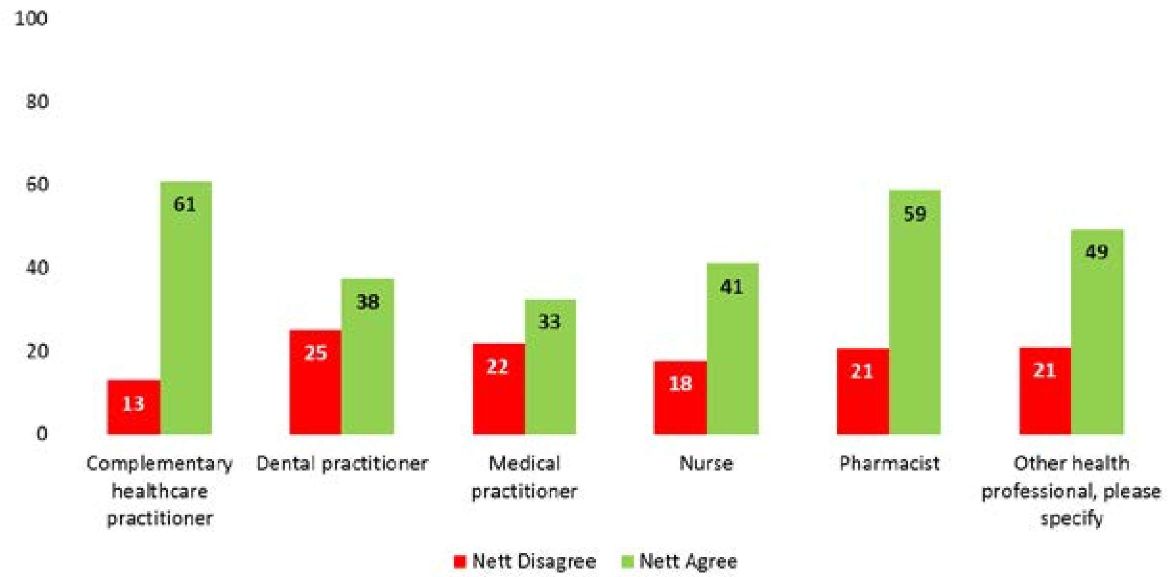
TGA provide opportunities to provide input into key decisions that impact me

Figure 41: TGA provides opportunities to provide input into key decisions that impact me by Stakeholder category (%)



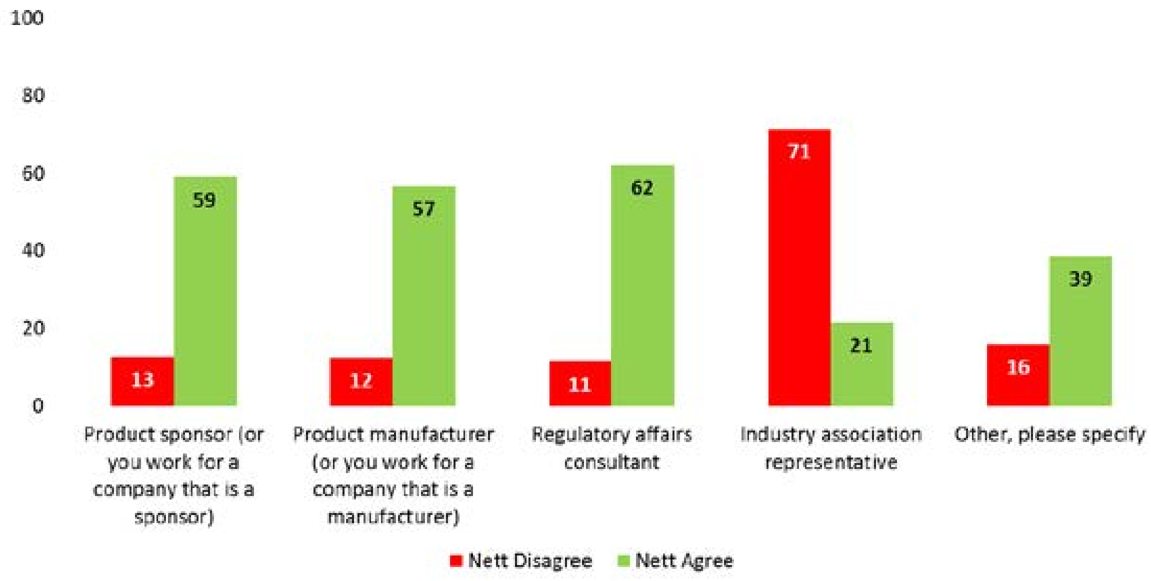
Health pro: N=219; Community: N=13; Med prod ind: N=1336; Retailer: N=99; Gov: N=56; Academic: N=67; Media: N=2; Other: N=343.

Figure 42: TGA provides opportunities to provide input into key decisions that impact me - Health professionals (%)



Comp health: N=23; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

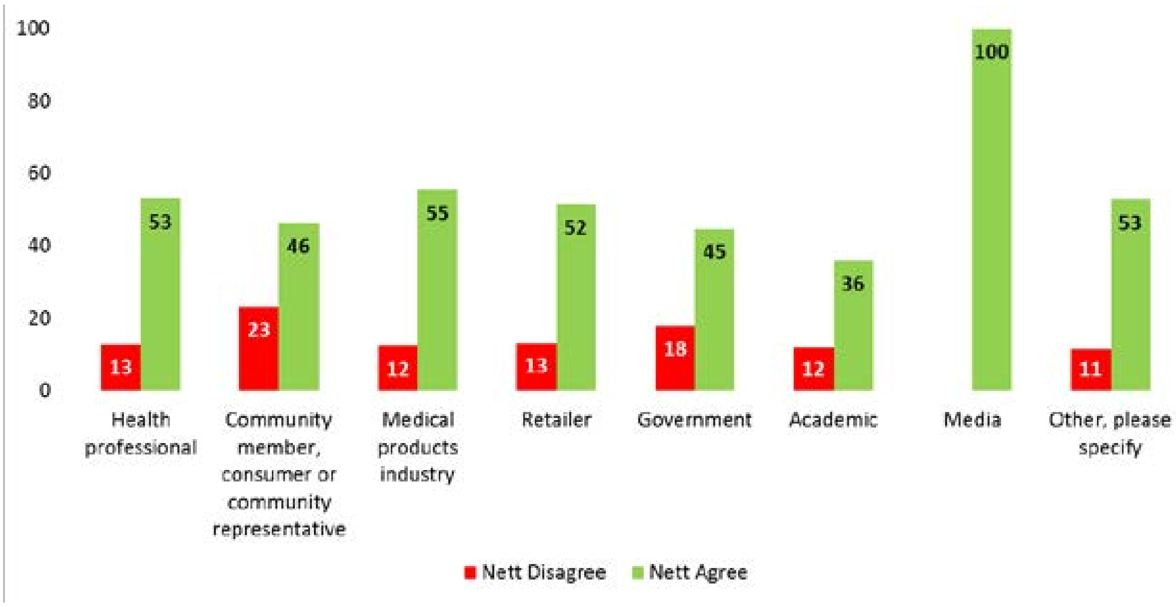
Figure 43: TGA provides opportunities to provide input into key decisions that impact me - Medical products industry (%)



Sponsor: N=763; Manufacturer: N=395; Reg Affairs Con: N=114; Ind Assoc Rep: N=14; Other: N=44.

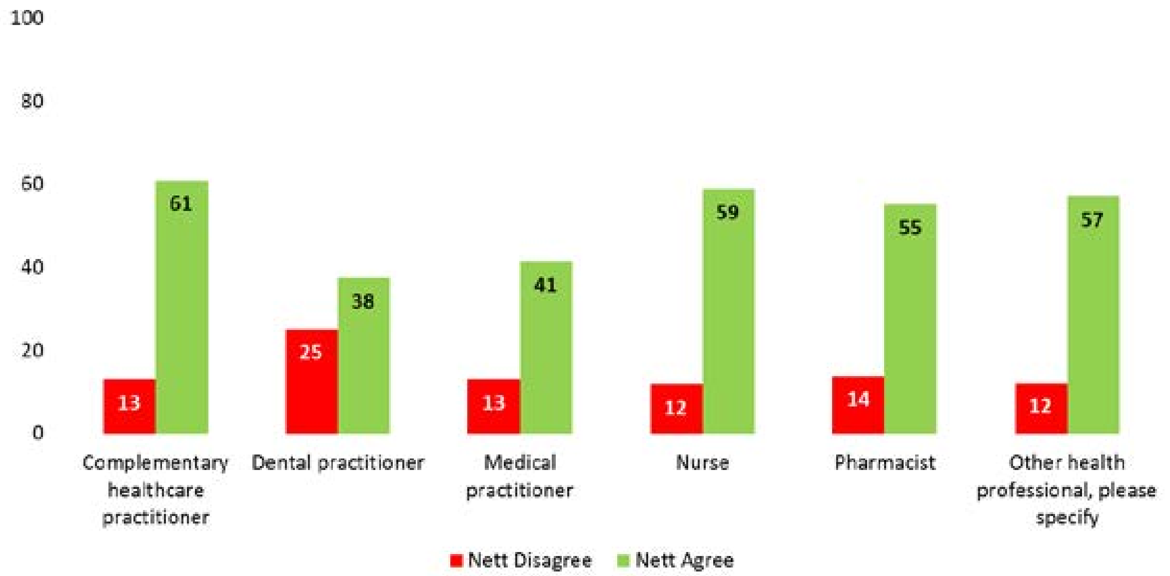
TGA provides a range of feedback channels

Figure 44: TGA provides a range of feedback channels by Stakeholder category (%)



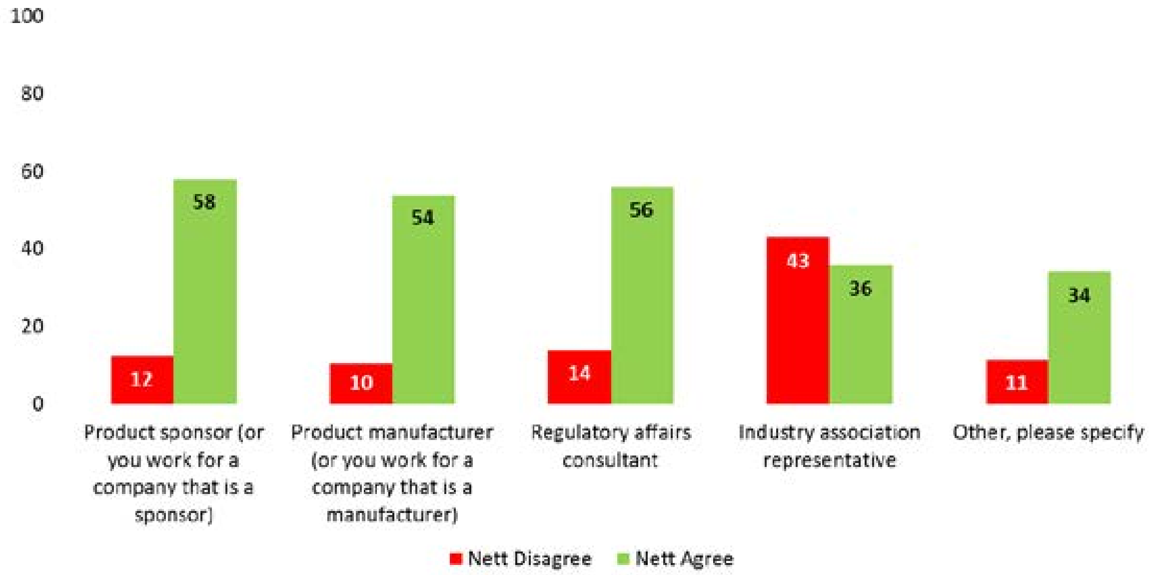
Health pro: N=219; Community: N=13; Med prod ind: N=1341; Retailer: N=99; Gov: N=56; Academic: N=67; Media: N=2; Other: N=345.

Figure 45: TGA provides a range of feedback channels - Health professionals (%)



Comp health: N=23; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

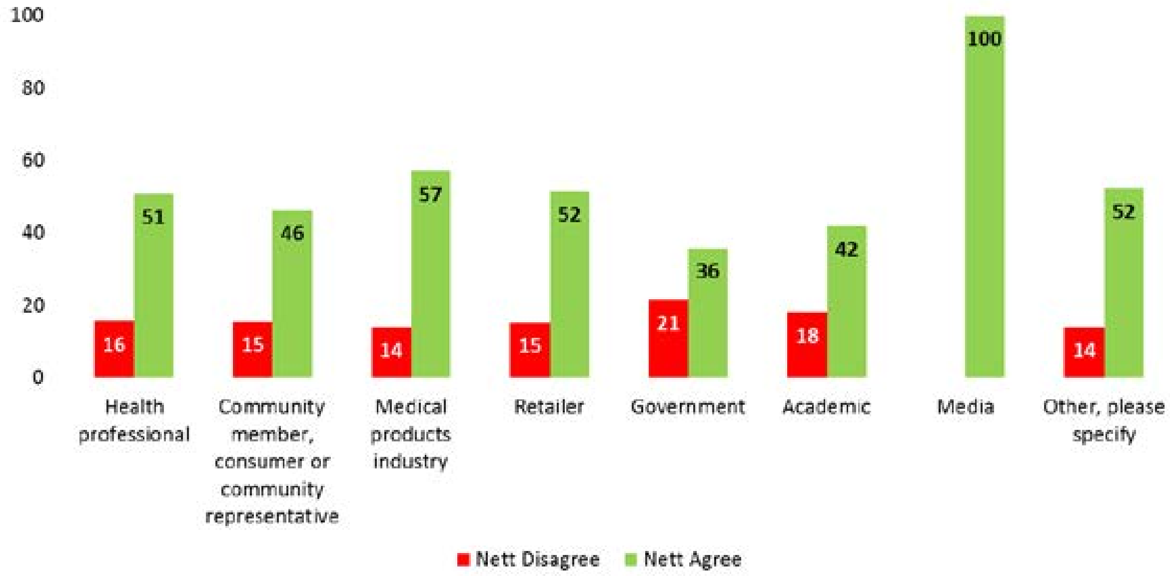
Figure 46: TGA provides a range of feedback channels - Medical products industry (%)



Sponsor: N=764; Manufacturer: N=397; Reg Affairs Con: N=116; Ind Assoc Rep: N=14; Other: N=44.

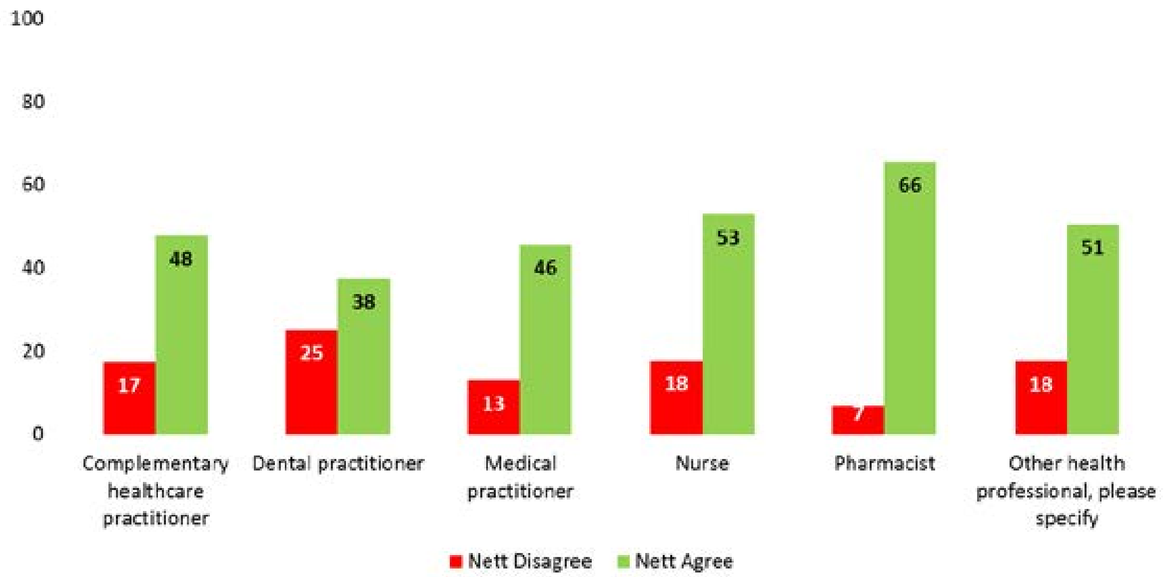
TGA is collaborative

Figure 47: TGA is collaborative by Stakeholder category (%)



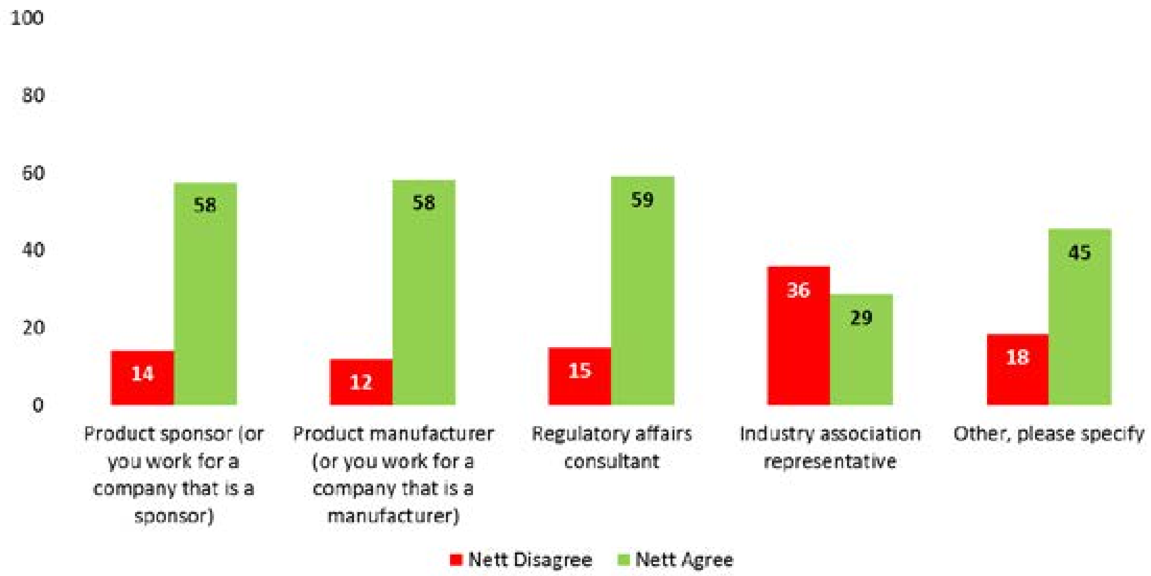
Health pro: N=219; Community: N=13; Med prod ind: N=1339; Retailer: N=99; Gov: N=56; Academic: N=67; Media: N=2; Other: N=345.

Figure 48: TGA is collaborative - Health professionals (%)



Comp health: N=23; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

Figure 49: TGA is collaborative – Medical products industry (%)



Sponsor: N=764; Manufacturer: N=396; Reg Affairs Con: N=115; Ind Assoc Rep: N=14; Other: N=44.

Communications, information and contact with the TGA

Communication and information services – Use

Contact with the TGA is strongly focussed on the TGA website, eBusiness services portal and email subscription services (Table 14 and Figure 50). Ninety six percent of participants highlight use of the TGA website, making it by far the most commonly used information channel. This outcome is consistent across all stakeholder groupings. Regular use of the website is also common, with just over 1 in 3 participants highlighting use once a week or more commonly. Regular use is most common amongst Medical products industry (43%) and Government stakeholders (35%; Table 15).

Table 14: Information service – Frequency of use (%)

Please indicate how much you use the following TGA services:								
Service	Never	Less than once a month	About once a month	Two or three times a month	About once a week	More than once a week	Any use	N
TGA website	3	28	19	14	11	24	**96**	2320
TGA eBusiness services portal	11	31	15	11	8	22	**87**	2313
Email subscription information services	27	26	11	8	12	11	**68**	2312
TGA Consultation Forecast	53	20	9	5	3	2	**40**	2307
TGA RSS feed	69	14	4	3	2	1	**24**	2303
TGA Twitter	86	7	1	1	1	0	**11**	2311
TGA roadshows	64	26	2	1	1	0	**30**	2305
TGA information sessions	46	40	5	1	1	1	**48**	2306
TGA conference booth	69	22	2	1	0	0	**25**	2306

Table 15: TGA Website – Frequency of use by stakeholder category (%)

Please indicate how much you use the following TGA services: TGA website								
Professional category	Never	Less than once a month	About once a month	Two or three times a month	About once a week	More than once a week	Not sure	N
Health professional	6	39	25	11	10	8	1	220
Community member, consumer or community representative	0	46	38	8	0	8	0	13
Medical products industry	2	22	17	15	12	31	1	1341
Retailer	7	33	25	10	10	12	2	99
Government	0	33	24	9	15	20	0	55
Academic	3	48	25	16	4	3	0	67
Media	0	0	0	0	50	0	50	2
Other, please specify	5	29	19	13	10	22	2	345

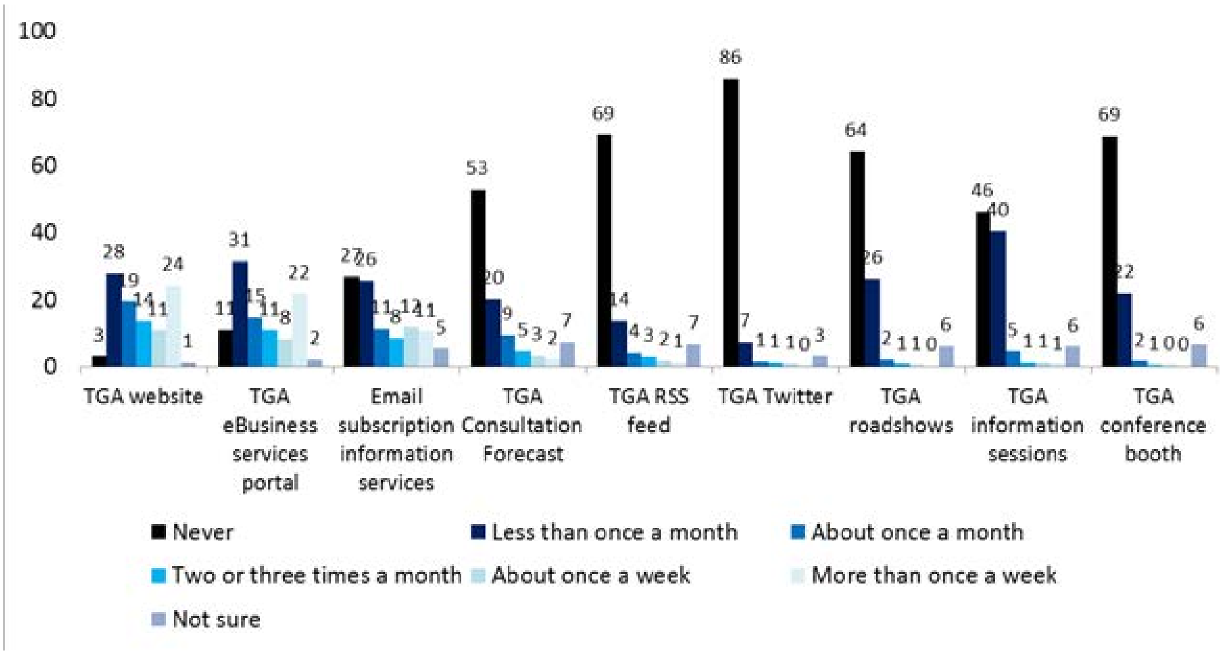
The eBusiness services portal is accessed by more than 85% of participants, with use substantially higher amongst Medical products industry (93%) and Government stakeholders (91%) and lower amongst Community members (67%) and health professionals (76%).

Email subscription services are regularly accessed amongst the respondent group, with just over two in three highlighting some use of this service. Use is highest amongst Medical products industry, Retailers and Health professionals.

Despite being substantially lower than the core online channels, Roadshow, Information session and Conference booth events are all highlighted by significant numbers of survey participants as methods of contact that they have used. Given the relatively low frequency of these events as well as the strong potential face to face engagement of these formats, these outcomes continue to highlight a strong TGA presence and relatively strong interest amongst the sampled stakeholders in participation and engagement with TGA.

RSS feeds and Twitter are not frequently accessed or used, with just under one in four highlighting any use of the RSS feed and just over one in ten using TGA Twitter. These levels, whilst suggesting a minor increase, remain similar to those observed in 2016 (Table 16).

Figure 50: Information service – Frequency of use (%)



N=2,303-2,320

There is a general trend toward a slight increase in overall use compared to 2016. In particular, consistent (small) decreases in the proportion of respondents who Never use the services are identified across all information channels (except the website where the overall use remains very high; Table 16).

Table 16: TGA information service – Frequency of use – 2016 vs 2017 (%)

Service	Never	Once a month or less	2-3 times a month or more	Never	Once a month or less	2-3 times a month or more
	2017			2016		
TGA website	3	47	49	3	46	49
TGA eBusiness services portal	11	46	41	12	44	42
Email subscription info services	27	37	31	30	36	28
TGA Consultation Forecast	53	30	10	57	29	7
TGA RSS feed	69	18	6	72	16	6
TGA Twitter	86	9	2	87	8	1
TGA roadshows	64	28	1	65	29	1
TGA information sessions	46	45	3	47	44	3
TGA conference booth	69	24	1	70	23	1

Table 17: Service use by Stakeholder category (% any use)

Please indicate how much you use the following TGA services:								
Service	Health pro	Comm'ty member	Medical prod ind	Retailer	Gov	Academic	Media	Other
Website	93	100	97	91	100	97	50	93
eBusiness portal	76	67	91	84	91	79	50	83
Email subscription	58	62	71	68	56	45	100	63
Consult'n Forecast	35	38	43	37	29	24	100	33
RSS feed	22	31	24	27	16	19	50	23
Twitter	11	15	10	17	7	16	0	7
Roadshows	21	15	34	23	24	21	0	25
Info sessions	37	46	52	37	56	45	0	43
Conference booth	18	15	27	22	26	27	0	19

Health pro: 217-220; Community: 12-13; Med prod ind: 1329-1341; Retailer: 97-99; Gov: 54-55; Academic: 66-67; Media: 1-2; Other: 340-345.

Table 18: Service use – Health professionals (% any use)

Please indicate how much you use the following TGA services:						
Service	Comp healthcare prac	Dental practitioner	Medical practitioner	Nurse	Pharmacist	Other
Website	96	88	85	100	100	93
eBusiness portal	83	50	61	88	79	81
Email subscription	75	38	46	53	71	58
Consult'n Forecast	42	13	26	35	41	40
RSS feed	25	13	22	24	31	20
Twitter	8	14	11	0	17	12
Roadshows	25	25	24	12	24	18
Info sessions	42	25	28	29	38	42
Conference booth	17	25	20	6	28	15

Comp health: 23-24; Dental: 7-8; Med pro: 46; Nurse: 17; Pharmacist: 28-29; Other: 89-91.

Table 19: Service use – Medical products industry (% any use)

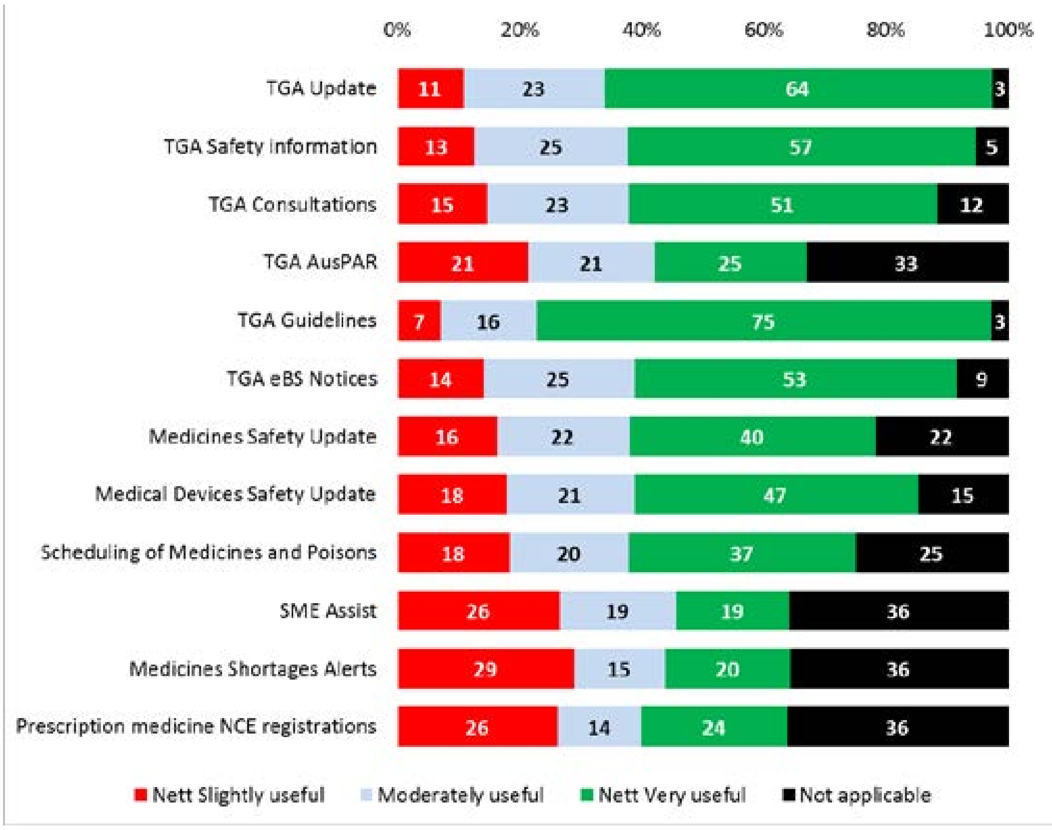
Please indicate how much you use the following TGA services:					
Service	Product sponsor	Product manufacturer	Reg affairs consultant	Industry assoc'n rep	Other
Website	98	95	97	100	95
eBusiness portal	94	83	96	79	84
Email subscription	75	65	77	64	52
Consult'n Forecast	47	34	55	46	25
RSS feed	26	21	28	29	18
Twitter	9	11	12	0	11
Roadshows	38	26	45	21	14
Info sessions	57	41	67	43	27
Conference booth	31	20	35	7	9

Sponsor: 754-764; Manufacturer: 394-398; Reg Affairs Con: 114-116; Ind Assoc Rep: 13-14; Other: 44-44.

Usefulness of information

Consistent with the findings in 2016, there is large variation in the perceived usefulness of information services provided by the TGA. The services that are most positively viewed are TGA guidelines (75%) nett *Very or Extremely Useful*, TGA updates (64%), TGA safety information (57%) and TGA eBS Notices (53%). The remaining information services show Nett Very or Extremely Useful outcomes ranging from 19% for SME assist to 51% for TGA consultations (Figure 51). Generally those who rate the services as Very or Extremely useful outweighed those who rate the services as Not at all or Slightly useful, however for SME assist, Medicines shortages alerts and Prescription medicine NCE registrations this is not the case. These services are also characterised by high Not applicable response levels, confirming the targeted nature of these information resources.

Figure 51: Usefulness of information services (%)



N=1,248-1,549

Comparison of ratings across surveys highlights a small yet generally positive trend toward higher proportions of useful ratings couple with lower levels of Not at all or Slightly useful ratings. In particular, TGA updates (64% 2017 Nett useful versus 58% 2016; 6% rise), TGA consultations (51% vs 46%l 5% rise) and TGA safety information (57% vs 53%; 4% rise) showed notable rises in Nett usefulness.

Table 20: Usefulness of information services – 2016 vs 2017

Please indicate how useful the following information services are for you in your role:							
	2017			2016			
Service	Nett Slightly useful	Moderately useful	Nett Very useful	Nett Slightly useful	Moderately useful	Nett Very useful	Change Nett Very useful
TGA Update	**11**	23	**64**	**14**	26	**58**	6
TGA Safety information	**13**	25	**57**	**15**	28	**53**	4
TGA Consultations	**15**	23	**51**	**18**	25	**46**	5
TGA AusPAR	**21**	21	**25**	**24**	21	**24**	1
TGA Guidelines	**7**	16	**75**	**8**	17	**73**	2
TGA eBS Notices	**14**	25	**53**	**15**	25	**52**	1
Medicines Safety Update	**16**	22	**40**	**19**	21	**38**	3
Medical Devices Safety Update	**18**	21	**47**	**19**	22	**44**	3
Scheduling of Medicines and Poisons	**18**	20	**37**	**22**	20	**35**	2
SME Assist	**26**	19	**19**	**-**	-	**-**	-
Medicines Shortages Alerts	**29**	15	**20**	**29**	17	**22**	-2
Prescription medicine NCE registrations	**26**	14	**24**	**27**	14	**24**	0

Tables 19-21 show variation in usefulness across major stakeholder categories. Across most categories, Community members tend to rate the usefulness higher, however the small sample sizes here make these outcomes unreliable.

Medical products industry participants view TGA updates more positively than other groups (68%), with Health professionals and Academics in particular both less likely to rate usefulness positively and more likely to view it negatively.

TGA consultations are slightly more favoured amongst Medical products industry (54%) and Academic (46%) groups, highlighting the low overall usefulness amongst other groups when compared to the overall average (which is strongly influenced by the large industry group).

AUSpar shows generally low usefulness amongst all groups, in particular Retailer (20%), Academic (17%) and Government (7%) stakeholders. TGA guidelines are strongly valued across all groups, although Industry participants (79%) and Academics (73%) show particularly high levels of useful ratings for this resource.

TGA Safety information, Medicines Safety updates and Medical devices safety updates are generally consistently viewed across stakeholder groups, although in the case of Safety updates, Industry members appear less likely to value this source.

Table 21: Usefulness of information services by stakeholder category – Part A (%)

Please indicate how useful the following information services are for you in your role:	TGA Update		TGA Safety information		TGA Consultations		TGA AusPAR	
Professional category	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**11**	**64**	**13**	**57**	**15**	**51**	**21**	**25**
Health professional	21	52	18	52	20	42	28	23
Community member	25	75	25	75	25	75	38	63
Medical products industry	9	68	12	59	14	54	21	27
Retailer	15	51	10	59	12	39	21	20
Government	10	45	10	61	13	35	17	7
Academic	20	43	17	57	13	50	20	17
Media	0	100	0	100	0	100	100	0
Other	10	60	12	52	13	48	18	19

Health professional: N=107-128.Community member: N=8-8; Medical products industry: N=759-960; Retailer: N=57-68; Government: N=28-32; Academic: N=28-30; Media: N=0-1; Other: N=182-222.

Table 22: Usefulness of information services by stakeholder category – Part B (%)

Please indicate how useful the following information services are for you in your role:	TGA Guidelines		TGA eBS Notices		Medicines safety Update		Medical Devices Safety Update	
Professional category	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**7**	**75**	**14**	**53**	**16**	**40**	**18**	**47**
Health professional	11	65	20	39	16	48	20	45
Community member	13	75	13	75	13	75	25	63
Medical products industry	6	79	12	57	17	39	18	49
Retailer	13	61	15	50	15	46	17	47
Government	0	68	23	35	13	45	10	52
Academic	7	73	17	27	10	47	10	50
Media	0	100	0	100	0	0	0	0
Other	6	71	14	51	15	36	17	38

Health professional: N=107-128.Community member: N=8-8; Medical products industry: N=759-960; Retailer: N=57-68; Government: N=28-32; Academic: N=28-30; Media: N=0-1; Other: N=182-222.

Table 23: Usefulness of information services by stakeholder category – Part C (%)

Please indicate how useful the following information services are for you in your role:

	Scheduling of Medicines and Poisons		SME Assist		Medicines Shortages Alerts		Prescription medicine NCE registrations	
Professional category	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**18**	**37**	**26**	**19**	**29**	**20**	**26**	**24**
Health professional	21	43	28	18	26	31	27	28
Community member	13	75	25	75	13	75	13	75
Medical products industry	19	35	27	18	31	19	26	26
Retailer	14	47	25	29	33	16	32	17
Government	21	32	23	13	23	23	28	16
Academic	14	39	27	17	20	27	20	20
Media	-	-	0	0	0	0	100	0
Other	16	37	24	15	25	17	25	18

Health professional: N=107-128.Community member: N=8-8; Medical products industry: N=759-960; Retailer: N=57-68; Government: N=28-32; Academic: N=28-30; Media: N=0-1; Other: N=182-222.

Within the Health professionals grouping (Tables 24-26), there are observable differences across categories. Pharmacists are most positively engaged with a broad range of information channels and resources. Dental practitioners (and to a lesser extent Medical practitioners) are generally more engaged with Medicines and Medical devices focussed alerts and updates (including shortages and alerts). In contrast, complementary healthcare practitioners in general tend to be less engaged across the range of information sources identified.

Table 24: Usefulness of information services – Medical professionals – Part A (%)

Please indicate how useful the following information services are for you in your role:

	TGA Update		TGA Safety information		TGA Consultations		TGA AusPAR	
Medical professionals	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**11**	**64**	**13**	**57**	**15**	**51**	**21**	**25**
Comp healthcare	28	56	22	56	22	56	22	22
Dental practitioner	33	33	33	33	33	33	50	50
Medical practitioner	33	33	29	33	20	30	33	24
Nurse	10	60	0	60	0	56	11	22
Pharmacist	15	85	5	85	10	60	30	50
Other	19	45	21	48	25	37	27	14

Comp health: N=15-18.Dental: N=3-3; Med pro: N=19-21; Nurse: N=9-10; Pharmacist: N=14-20; Other: N=44-53.

Table 25: Usefulness of information services – Medical professionals – Part B (%)

Please indicate how useful the following information services are for you in your role:								
	TGA Guidelines		TGA eBS Notices		Medicines Safety Update		Medical Devices Safety Update	
Medical professionals	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**7**	**75**	**14**	**53**	**16**	**40**	**18**	**47**
Comp healthcare	17	56	22	39	22	44	28	28
Dental practitioner	33	67	33	67	33	67	33	67
Medical practitioner	14	57	25	30	0	48	0	55
Nurse	0	67	11	56	0	56	0	44
Pharmacist	5	85	15	35	5	84	15	50
Other	10	67	22	37	27	33	31	40

Comp health: N=15-18.Dental: N=3-3; Med pro: N=19-21; Nurse: N=9-10; Pharmacist: N=14-20; Other: N=44-53.

Table 26: Usefulness of information services – Medical professionals – Part C (%)

Please indicate how useful the following information services are for you in your role:								
	Scheduling of Medicines and Poisons		SME Assist		Medicines Shortages Alerts		Prescription medicine NCE registrations	
Medical professionals	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**18**	**37**	**26**	**19**	**29**	**20**	**26**	**24**
Comp healthcare	27	40	39	17	33	22	33	22
Dental practitioner	33	67	33	67	33	67	33	67
Medical practitioner	11	53	10	25	19	33	29	24
Nurse	0	44	0	10	0	30	0	33
Pharmacist	7	79	30	30	25	70	16	47
Other	30	30	35	12	32	19	35	21

Comp health: N=15-18.Dental: N=3-3; Med pro: N=19-21; Nurse: N=9-10; Pharmacist: N=14-20; Other: N=44-53.

Within the Medical products industry grouping, Regulatory affairs consultants continue to be a key user of resources, showing strong perceptions of usefulness across a broad range of measures (Tables 27-29). Product sponsors and Manufacturers also show strong usefulness ratings across a range of resources, whilst Industry association representatives tend to show lower usefulness ratings.

Table 27: Usefulness of information services – Medical products industry – Part A (%)

Please indicate how useful the following information services are for you in your role:								
	TGA Update		TGA Safety information		TGA Consultations		TGA AusPAR	
Industry category	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**11**	**64**	**13**	**57**	**15**	**51**	**21**	**25**
Product sponsor	10	70	11	61	14	57	21	28
Product manufacturer	10	62	12	53	16	44	22	20
Reg affairs con	3	82	12	65	9	60	16	44
Ind assoc'n rep	30	40	30	50	22	33	33	0
Other	4	70	9	74	9	61	22	26

Sponsor: N=455-575.Manufacturer: N=216-260; Reg Affairs Con: N=61-89; Ind Assoc Rep: N=5-10; Other: N=19-23.

Table 28: Usefulness of information services – Medical products industry – Part B (%)

Please indicate how useful the following information services are for you in your role:								
	TGA Guidelines		TGA eBS Notices		Medicines Safety Update		Medical Devices Safety Update	
Medical professionals	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**7**	**75**	**14**	**53**	**16**	**40**	**18**	**47**
Product sponsor	5	80	11	60	15	40	18	49
Product manufacturer	8	74	19	48	22	33	20	47
Reg affairs con	4	90	3	73	11	49	15	58
Ind assoc'n rep	11	56	22	11	11	56	33	44
Other	0	74	13	52	17	43	4	48

Sponsor: N=455-575.Manufacturer: N=216-260; Reg Affairs Con: N=61-89; Ind Assoc Rep: N=5-10; Other: N=19-23.

Table 29: Usefulness of information services – Medical products industry – Part C (%)

Please indicate how useful the following information services are for you in your role:								
	Scheduling of Medicines and Poisons		SME Assist		Medicines Shortages Alerts		Prescription medicine NCE registrations	
Medical professionals	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful	Nett Slightly useful	Nett Very useful
Total	**18**	**37**	**26**	**19**	**29**	**20**	**26**	**24**
Product sponsor	18	36	26	17	30	20	24	28
Product manufacturer	23	28	26	18	30	17	30	16
Reg affairs con	8	54	34	20	33	24	23	40
Ind assoc'n rep	20	20	40	30	40	10	33	11
Other	16	21	23	23	35	13	26	17

Sponsor: N=455-575.Manufacturer: N=216-260; Reg Affairs Con: N=61-89; Ind Assoc Rep: N=5-10; Other: N=19-23.

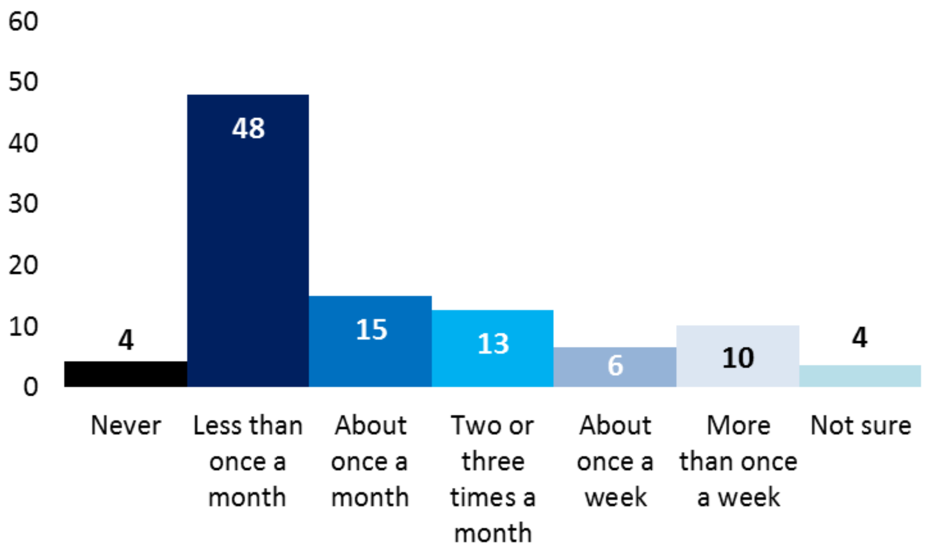
Frequency of contact

Just under half of survey participants report being in contact with the TGA Less than once a month (48%). A further four percent (4%) highlight that they Never have contact. Just under 3 in 10 participants highlight contact frequency of About once a month (15%) or Two or three times a month (13%; Table 30). Those in very regular contact (More than once a week) account for one in 10 stakeholders with a slightly smaller amount being in contact about once a week (6%). The patterns here are similar to those recorded in the 2016 survey.

Table 30: Frequency of contact with the TGA

How often do you have contact with the TGA?								
Year	Never	Less than once a month	About once a month	Two or three times a month	About once a week	More than once a week	Not sure	N
2017	4	48	15	13	6	10	4	2269
2016	5	51	17	12	6	9	-	2429

Figure 52: Frequency of contact with TGA (%)



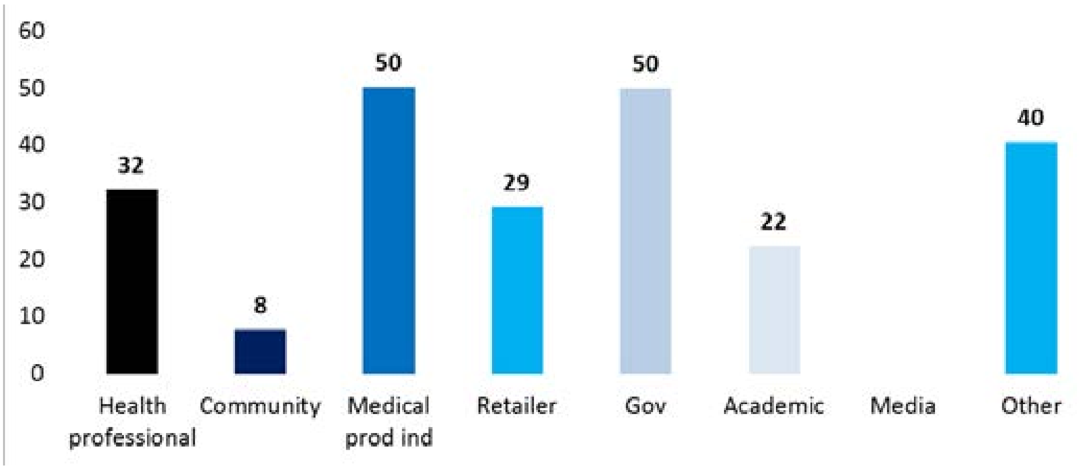
N=2,269

Those in the Medical products industry and Government stakeholders tend to be in contact more frequently than other groups (Table 31 and Figure 53). Half of these groups report being in contact monthly or more often. Within the Medical products industry, frequency of contact is highest amongst Regulatory affairs consultants (70% Monthly or more often) Product sponsors (58%) and Industry association representatives (64%). Product manufacturers are less frequently in contact (30%).

Table 31: Frequency of contact by stakeholder category (%)

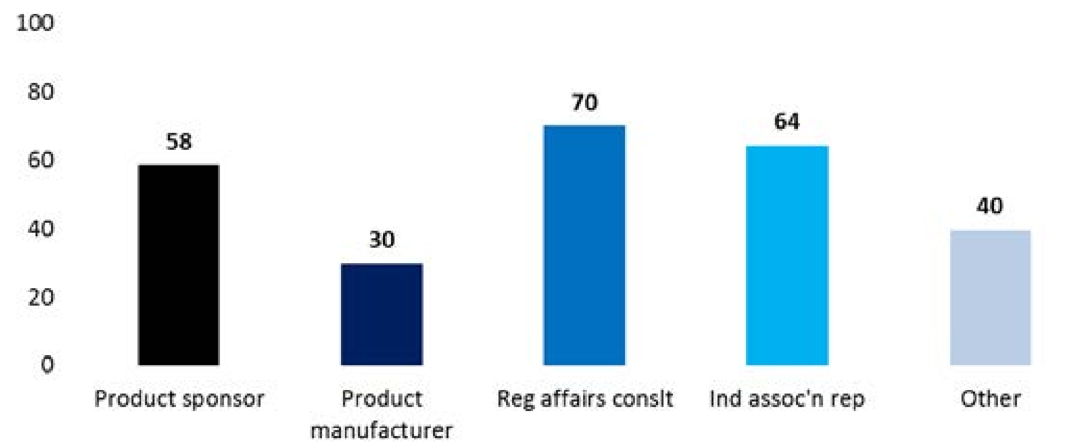
Professional category	Never	Less than once a month	About once a month	Two or three times a month	About once a week	More than once a week	Not sure	N
Health professional	6	58	11	14	2	5	4	220
Community	8	77	0	8	0	0	8	13
Medical prod ind	3	44	15	14	9	12	3	1338
Retailer	10	55	19	6	1	3	6	99
Government	7	36	14	13	4	20	7	56
Academic	4	72	15	7	0	0	1	67
Media	50	50	0	0	0	0	0	2
Other	6	47	16	12	5	8	6	346

Figure 53: Frequency of contact – Monthly or more often - with TGA by Stakeholder category



Health pro: 220; Community: 13; Med prod ind: 1338; Retailer: 99; Gov: 56; Academic: 67; Media: 2; Other: 346.

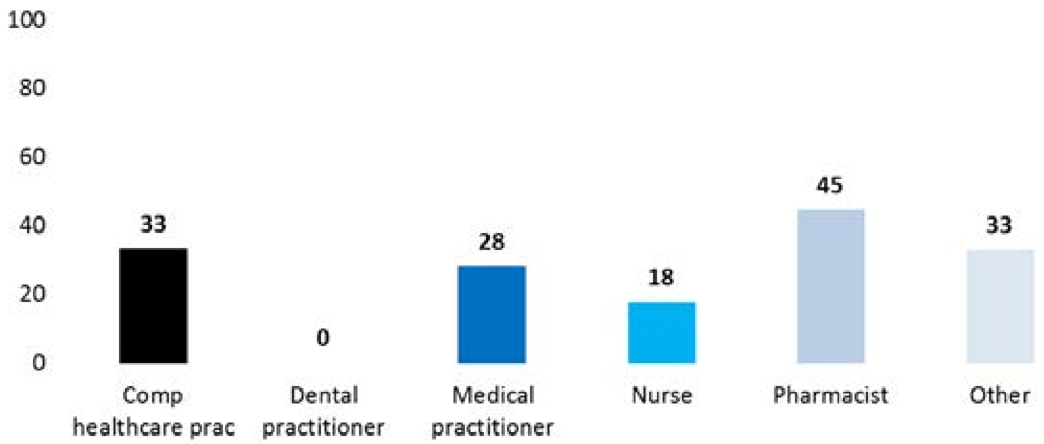
Figure 54: Frequency of contact – Monthly or more often - with TGA – Medical products industry (%)



Sponsor: N=763.Manufacturer: N=396; Reg Affairs Con: N=116; Ind Assoc Rep: N=14; Other: N=43.

Health professionals (32%), Retailers (29%) and Academics (22%) all show regular contact at lower levels. Within the Health professionals category, contact levels are highest amongst Pharmacists (45% monthly or more often) and complementary healthcare professionals (33%).

Figure 55: Frequency of contact – Monthly or more often - with TGA – Health professionals (%)



Comp health: N=24.Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

Reasons for contact

The most commonly selected reasons to contact the TGA are to lodge an application and to check the progress of an application with the TGA (Table 32 and Figure 56). These reasons are most commonly highlighted by those in the Medical products industry category. Seeking information about products, information about manufacturing and importing/exporting focussed issues were also commonly identified amongst the range of stakeholders responding to the survey. Engagement with the TGA on issues related to consultation activities is also commonly identified.

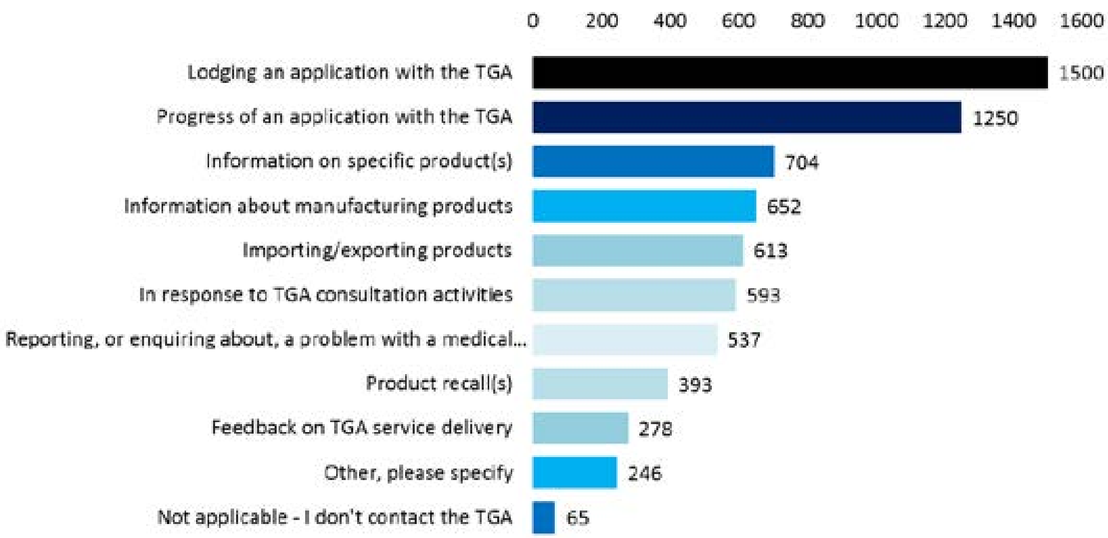
Table 32: Reasons for contact

For which of the following do you contact the TGA?	
Reason	**n**
Lodging an application with the TGA	1500
Progress of an application with the TGA	1250
Information on specific product(s)	704
Information about manufacturing products	652
Importing/exporting products	613
In response to TGA consultation activities	593
Reporting, or enquiring about, a problem with a medical device or medicine	537
Product recall(s)	393
Feedback on TGA service delivery	278
Other, please specify	246
Not applicable - I don't contact the TGA*	65

* Note: 97 respondents highlighted at that they *Never* have contact with the TGA in the previous question. This group was not presented with the current question in the survey.

Responses identifying more specific issues, such as product recalls and problems with a device, or medicine shortage, while less commonly identified by participants, represent significant contact points.

Figure 56: Reasons for contact



Respondents commonly highlight a range of reasons for making contact, with an average of 2.3 reasons per respondent. Most often, respondents highlight two, three or four reasons (Table 33). The overall pattern here is similar to that observed in the 2016 survey, although the average number of reasons for contact was down from 3.2 in 2016.

Table 33: Reasons for contact – number of reasons

Number of selections	n
1	338
2	445
3	387
4	355
5	213
6	124
7	74
8	38
9	34
10	2
Average	2.3

In addition to the reasons provided in the survey, a range of Other reasons are identified in open ended options for this question. These include:

- ACE scheme.
- Advertising compliance, exemptions and complaints.
- Fees and payments information.
- ARTG.

- Audit issues.
- Clarification of issues - various (e.g. guidelines; legislation, regulations).
- Clinical trials information.
- CTN applications.
- eSubmissions.
- GMP audits and certification.
- Information – general.
- Ingredients.
- Inspections - responses and reviews.
- Licensing and licensing variations.
- Medicinal cannabis.
- Payments and fees.
- Assistance with the website, portal or other IT.
- Pharmacovigilance.
- IVD queries.
- Research.
- Updating information or advice - e.g. contact information; registration information.

Contact channels

The most common contact channel is via email, followed by phone (Table 34 and Figure 57). Along with the website, these channels represent the key methods of contact that will be utilised by those wishing to make contact with TGA. The pattern is consistent with that observed in 2016. A notable difference compared to 2016 is that the proportion of overall selections accounted for by the website appears to be rising slightly, up from 16% of total selections to 18%.

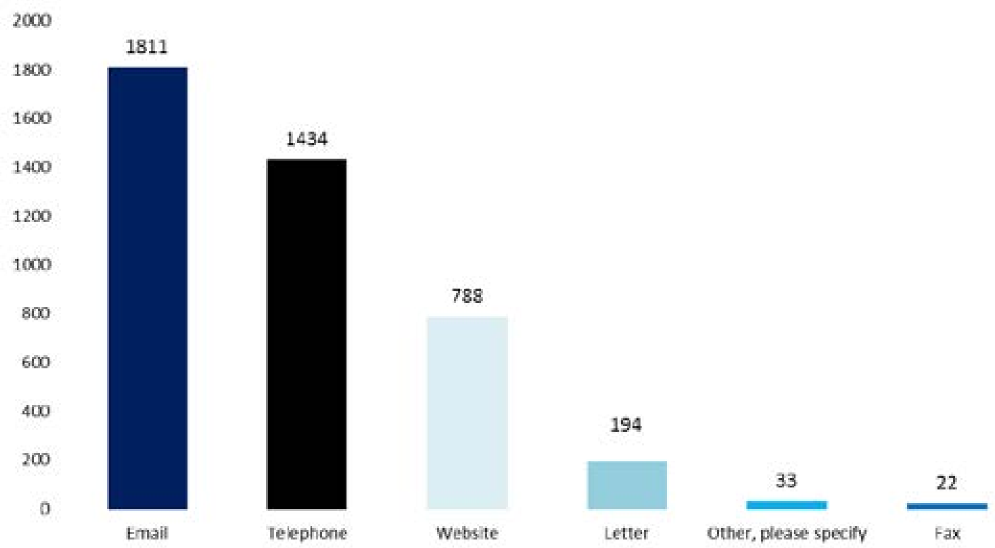
This pattern of contact methods is similar across all groups and sub-groups in the survey.

Letter and fax contact methods are still utilised by a small proportion of people and will continue to need some monitoring and resourcing. These methods continue to be most commonly used by those in the Medical products industry and Health professionals. However, it is notable that as a proportion of the overall selections, both methods appear to be in decline, with the proportion of selections represented by fax contacts halving between 2016 and 2017 (1% down to 0.5%) and the proportion of Letter selections falling from 6% in 2016 to 4.5% in 2017.

Table 34: Contact channels

How do you contact the TGA?	
Method	**n**
Email	1,811
Telephone	1,434
Website	788
Letter	194
Fax	22
Other	33

Figure 57: Contact channel



Other contact methods identified in free text responses are:

- Through the eBS or online portal.
- Face to face.
- Via a sponsor.
- Via a consultant.

Table 35: Number of channels

Number of channels	n
1	455
2	921
3	534
4	82
5	11
Average	**1.5**

A range of contact methods are used by individuals, although the average number of selections declined slightly between 2016 and 2017 (from 2.2 to 1.5 selections per respondent; Table 35). This was largely driven by a rise in the proportion of people selecting a single contact method (commonly email or phone).

Response times

Respondents who had highlighted use of the individual contact channels identified in the survey were asked to highlight how long it generally takes to receive a response (Table 36 and Figure 58). As expected, the contact method with the fastest average resolution time is phone, with just under three in ten highlighting immediate response and 83% experiencing a response in two days or less (2016 83%).

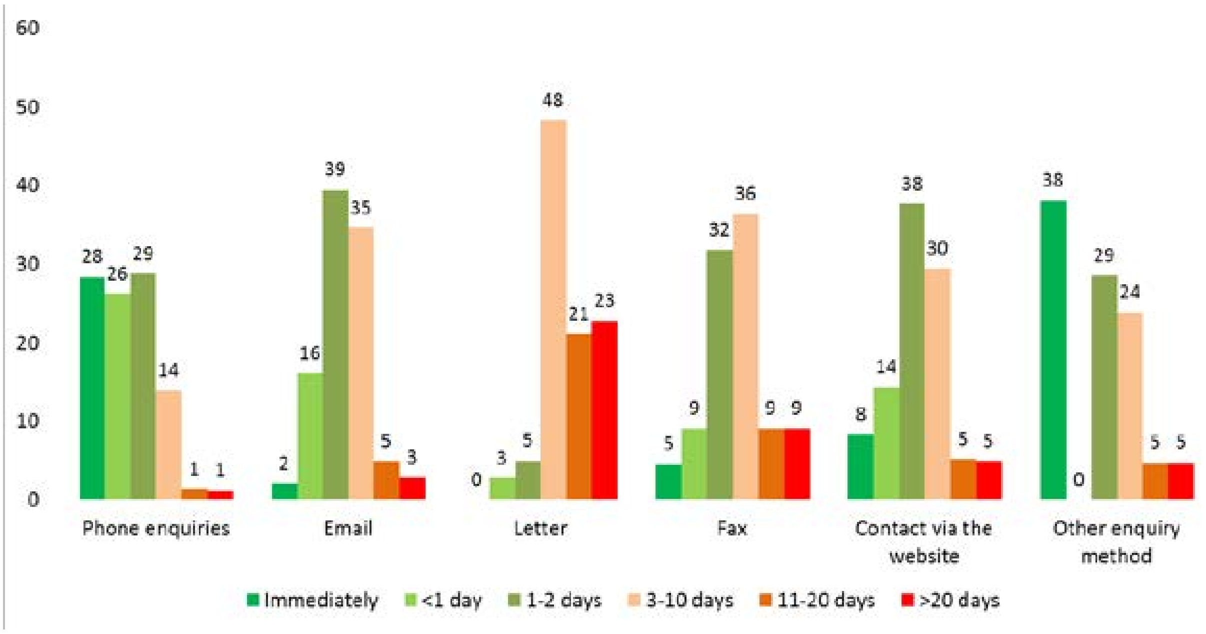
Website and email contacts also show strong response levels – 60% and 58% respectively receiving a response in two days or less. In both cases the remaining responses commonly report response times of between 3 and 10 days, with almost 1 in 3 responses in each of these categories falling within this band. This large group, representing a significant overall proportion of incoming contacts, presents a key opportunity for the TGA. Increasing perceptions and experiences of fast response times, particularly via the website channel, will promote the ongoing use of this contact method over (less efficient) phone contacts.

Table 36: Response times by contact category (%)

Generally, how long does it take the TGA to respond to your:

Method	Immediately	<1 day	1-2 days	3-10 days	11-20 days	>20 days	N
Phone enquiries	28	26	29	14	1	1	1392
Email	2	16	39	35	5	3	1764
Letter	0	3	5	48	21	23	180
Fax	5	9	32	36	9	9	22
Contact via the website	8	14	38	30	5	5	732
Other enquiry method	38	0	29	24	5	5	21

Figure 58: Response times by contact category (%)



N=21-1,764

As expected, Letter and Fax response times are slower, although in comparison to the 2016 outcomes, fax response time appear to have been streamlined, with the proportion of responses received in 2 days or less rising from 31% in 2016 to 45% in 2017 (Table 37). Response time patterns were generally similar across the range of stakeholder groups within the survey.

Table 37: Response times by contact category – 2016 vs 2017 (%)

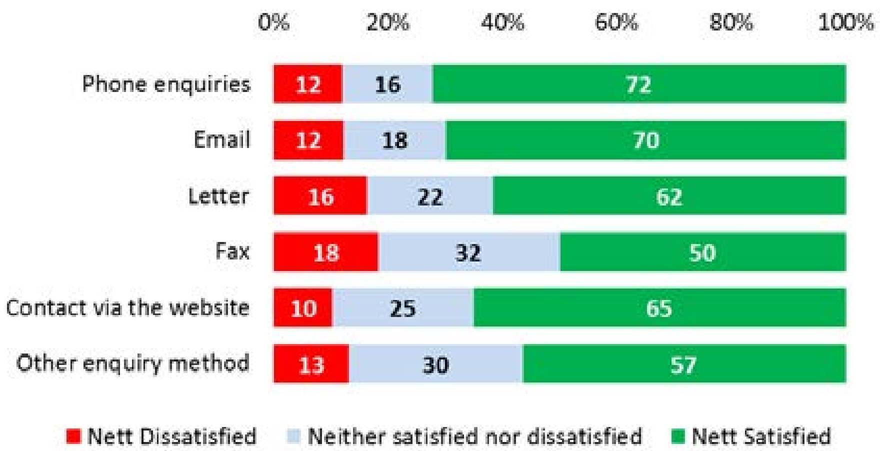
Generally, how long does it take the TGA to respond to your:								
	Immediately	2 days or under	3-10 days	11+ days	Immediately	2 days or under	3-10 days	11+ days
Method	2017				2016			
Phone enquiries	28	55	14	3	29	55	13	3
Email	2	56	35	8	1	53	35	11
Letter	0	8	48	44	1	6	44	50
Fax	5	41	36	18	2	29	44	24
Contact via the website	8	52	30	10	10	48	33	10
Other enquiry method	38	29	24	10	16	25	22	38

Satisfaction with response

Satisfaction with responses is high for both phone (72%) and email (70%) enquiries. Continued focus on call architecture, call answer times and limiting call forward experiences will be likely to maintain and improve the phone based outcomes. Further, ensuring that email responses are prompt and provide clear and relevant information leading to high resolution rates will be likely to reinforce use of this channel.

Contact via the website is generally positively viewed. This channel represents a key opportunity to promote and expand, with effective resolution via website visits representing a response mechanism requiring no direct staff investments. Promoting and ensuring that this channel is able to respond to a broad range of needs is key to ensuring continued uptake and use of website resources as a primary contact channel.

Figure 59: Satisfaction with response - contact type (%)



Phone: N=1409; Email: N=1778; Letter: N=185; Fax: N=22; Website: N=751; Other: N=23

Trends across the 2016 and 2017 surveys highlight a similar pattern of responses, with positive satisfaction trends evident across most response channels (Table 38 and Figure 60). Nett satisfaction rose slightly across years for Phone, Email, Letter and Website contacts.

Table 38: Response satisfaction – 2016 vs 2017 (%)

Generally, how satisfied are you with the TGA response to your:							
	Nett Dissatisfied	Neither	Nett Satisfied	Nett Dissatisfied	Neither	Nett Satisfied	Change Nett Satisfied
Response area		2017			2016		
Phone enquiries	**12**	16	**72**	**13**	17	**70**	2
Email	**12**	18	**70**	**15**	20	**66**	4
Letter	**16**	22	**62**	**17**	27	**56**	6
Fax	**18**	32	**50**	**11**	27	**62**	-12
Contact via the website	**10**	25	**65**	**11**	26	**63**	3
Other enquiry method	**13**	30	**57**	**11**	22	**67**	-10

Figure 60: Satisfaction with response – 2016 vs 2017 (%)

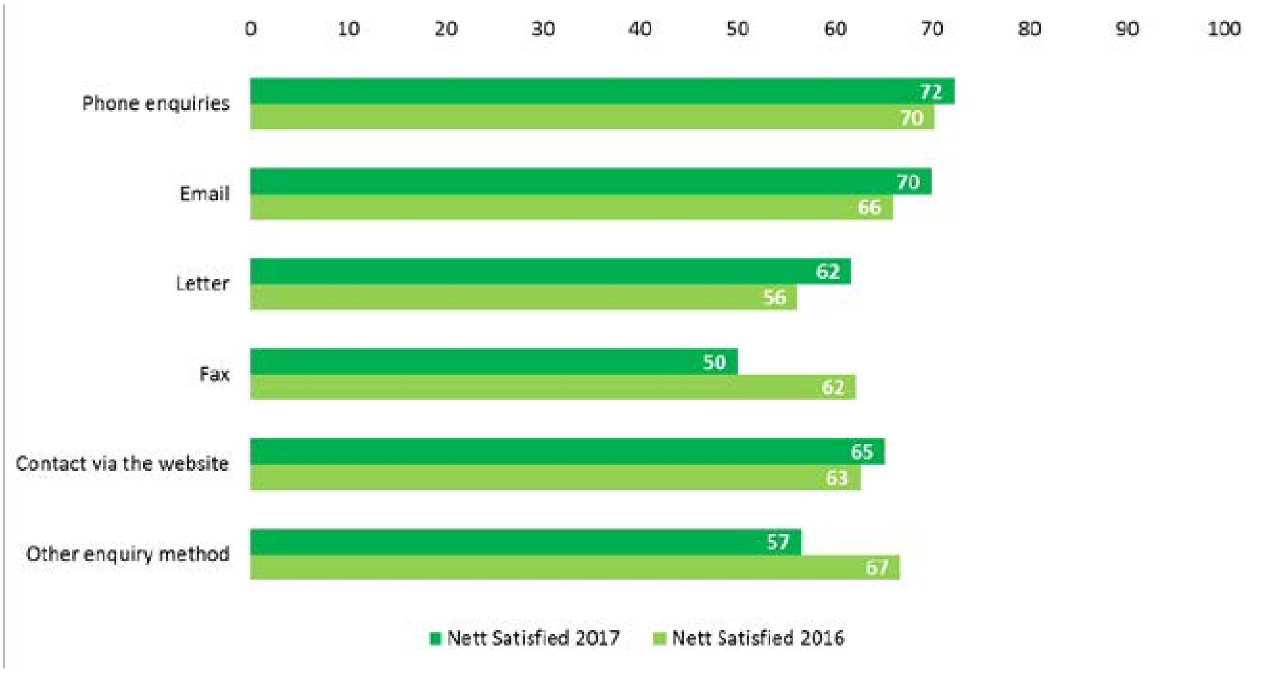
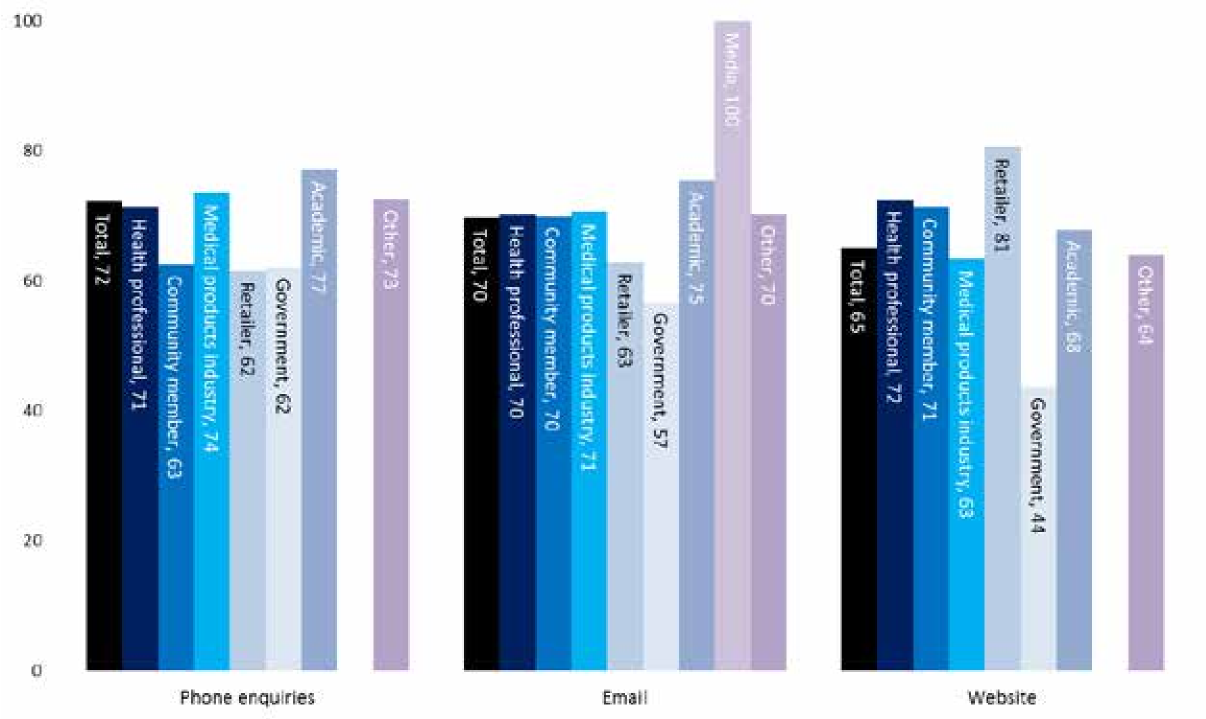


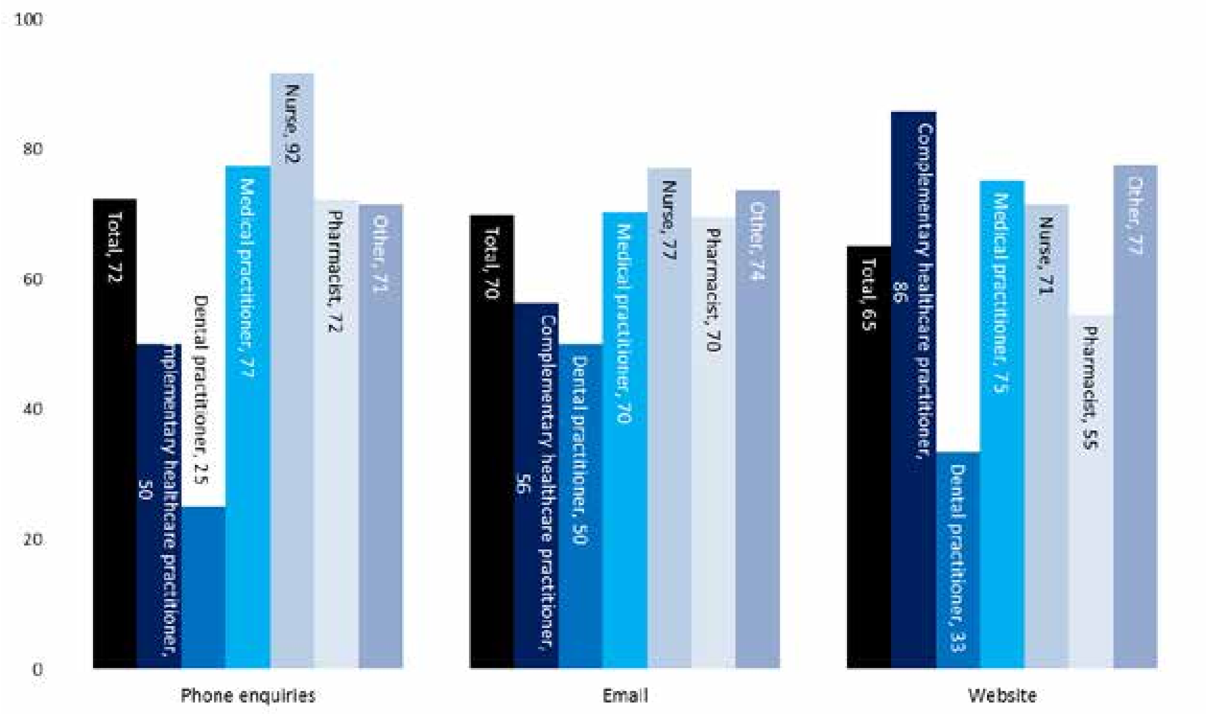
Figure 61: Nett satisfied – Phone, Email, Website - stakeholder category (%)



Health pro: N=69-168; Community: N=7-10; Med prod ind: N=476-1113; Retailer: N=31-62; Gov: N=16-37; Academic: N=28-53; Media: N=0-1; Other: N=103-259.

Healthcare professionals show strong satisfaction across the three most commonly accessed communication channels (Figure 61). Within this group, these levels of satisfaction are driven by fluctuating experiences (Figure 62), however the small sample sizes here are small.

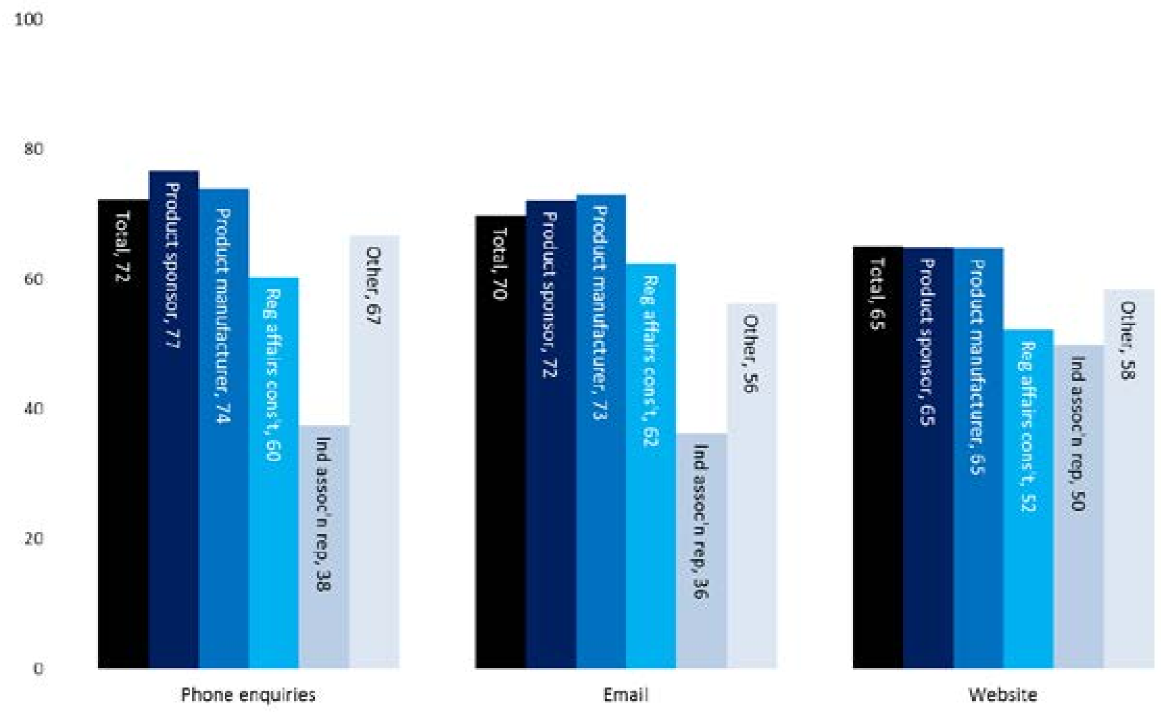
Figure 62: Nett satisfied - Phone, Email, Website – Healthcare professionals (%)



Comp health: N=7-16; Dental: N=3-4; Med pro: N=8-37; Nurse: N=7-13; Pharmacist: N=11-23; Other: N=31-72;

As with other areas of the survey, Product sponsors and Product manufacturers show satisfaction levels generally in line with or just above the overall average. In contrast, Industry association representatives and regulatory affairs consultants show generally lower than average results across the three main channels of Phone, Email and Website contact (Figure 63).

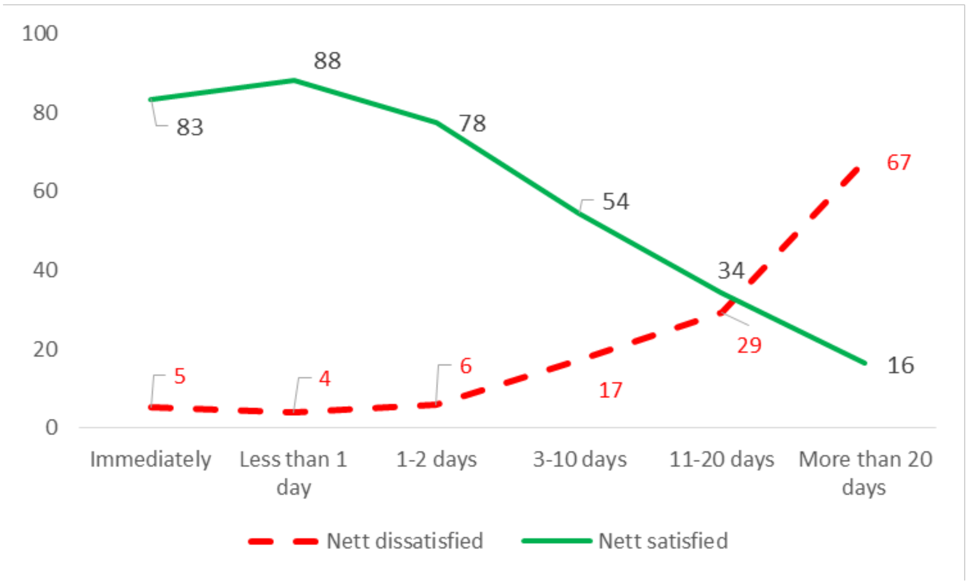
Figure 63: Nett satisfied - Phone, Email, Website – Medical products industry (%)



Sponsor: N=288-653; Manufacturer: N=128-304; Reg Affairs Con: N=44-109; Ind Assoc Rep: N=2-11; Other: N=12-32.

While the differences across stakeholder categories offer important insights into the experience of various groups making contact with the TGA, the main driver of satisfaction across all contact channels is response times. Figure 64 highlights the strong association here, with immediate and single day response times resulting in satisfaction levels of above 80% coupled with very low levels of dissatisfaction. Beyond this, increasing response times result in falling satisfaction and increasing dissatisfaction. Continued focus on achieving streamlined processes for responding to contacts is recommended. Target outcomes here will depend on the contact method being considered, with website optimisation, call architecture and call response outcomes, email handling processes and efforts to drive down use of less responsive channels such as fax and letter all potentially relevant strategies.

Figure 64: Satisfaction and Dissatisfaction with contact (all contact methods) vs Response time



Communications – Overall satisfaction

Overall nett satisfaction with the experience of communicating with the TGA is observed at 69%, with 12% highlighting some level of dissatisfaction (Table 39). This level compares favourably with the 2016 results, representing a rise of 6% Nett satisfaction and a slight (3%) drop in Nett dissatisfaction.

Table 39: Communication- Overall satisfaction – 2016 vs 2017

Overall, how satisfied are you with the experience of COMMUNICATING with the TGA?							
	Nett Dissatisfied	Neither	Nett Satisfied	Nett Dissatisfied	Neither	Nett Satisfied	Change Nett Satisfied
	2017			2016			
Satisfaction	**12**	19	**69**	**15**	22	**63**	6

Medical products industry (70% Nett satisfaction) and Health professionals (70%) show generally strong levels of satisfaction (Table 40). Within the Medical products industry category, high levels of satisfaction with communication outcomes are evident across both Product sponsor and Product manufacturer categories (73% and 70% respectively). As observed in a range of other areas within the survey, satisfaction is particularly low amongst the small group of Industry association representatives, with 5 of the 12 respondents satisfied with the overall outcome and a further 5 expressing dissatisfaction.

Within the health professional category, there are large fluctuations in satisfaction across the range of relatively small groups identified. Medical practitioner (69% Nett satisfied), Pharmacist (74%), Nurse (87%) and Other (70%) categories all showed generally strong levels of satisfaction. Importantly, overall Nett dissatisfaction amongst health professionals was consistently low (at or below 10% in most cases).

Government (49% Nett satisfied; 21% Nett dissatisfied) and Retailer (65% Nett satisfied; 16% Nett dissatisfied) stakeholders show relatively low levels of Nett satisfaction and relatively high levels of nett dissatisfaction. Whilst these groupings appear to represent a relatively small proportion of the stakeholder population, ensuring that communications are relevant, timely and targeted to the needs of these stakeholders is likely to address lower outcomes in this area.

Table 40: Communication – Overall satisfaction by Stakeholder category, Industry, and Health professional categories (%)

Overall, how satisfied are you with the experience of COMMUNICATING with the TGA?				
Category	Nett Dissatisfied	Neither	Nett Satisfied	N
Stakeholder category				
Health professional	10	20	70	191
Community	18	9	73	11
Medical products ind	11	18	70	1214
Retailer	16	19	65	81
Government	21	30	49	43
Academic	14	19	67	63
Media	0	0	100	1
Other	12	20	68	290
Medical products industry				
Product sponsor	10	17	73	710
Product manufacturer	11	19	70	342
Regulatory affairs consultant	16	19	65	111
Ind assoc'n rep	42	17	42	12
Other	15	21	64	33
Health professional				
Complementary healthcare practitioner	11	32	58	19
Dental practitioner	14	29	57	7
Medical practitioner	8	23	69	39
Nurse	7	7	87	15
Pharmacist	11	15	74	27
Other	10	20	70	80

Participants were provided with an opportunity to comment on their experience communicating with the TGA. These comments provided a broad range of feedback.

TGA Information Website

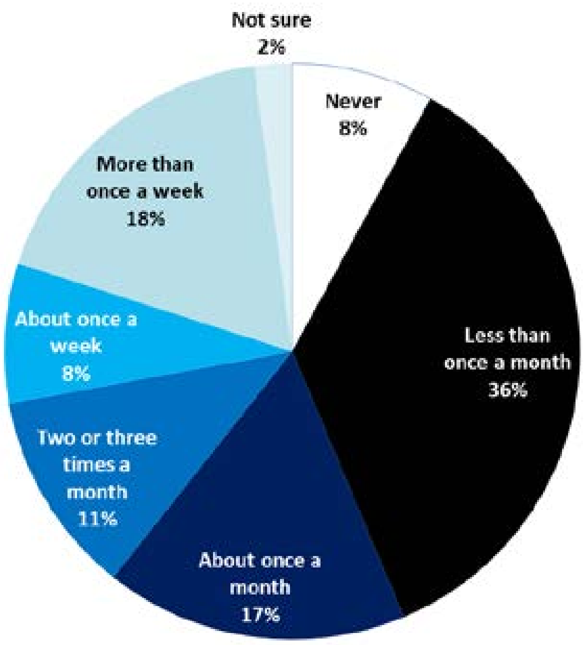
Website use

Nine in ten respondents in the survey use the TGA website. Most commonly this use is infrequent, occurring either less than once a month (36%) or about once a month (17%; Table 41 and Figure 65). Just over one in four respondents visit the site on a regular basis (weekly or more often; 26%). The pattern here, which is highly consistent with that observed in 2016, continues to highlight the various levels of familiarity that TGA stakeholders will have with the site. Maximising the logic, navigation and user friendliness of the site for a range of users should remain a priority.

Table 41: TGA website – Frequency of use (%)

How often do you visit the TGA information website?		
Frequency	**2017**	**2016**
Never	8	8
Less than once a month	36	35
About once a month	17	19
Two or three times a month	11	10
About once a week	8	9
More than once a week	18	18
Not sure	2	2
N	**2194**	**2424**

Figure 65: TGA website – Frequency of use



N=2,194

Overall use (ever use) is generally similar across all stakeholder groupings in the survey. In contrast, regular use of the site appears to vary markedly across stakeholder groupings, with Medical products industry, Government and Other stakeholders all showing relatively common frequent use (Table 42). Regular use is generally low amongst health professionals.

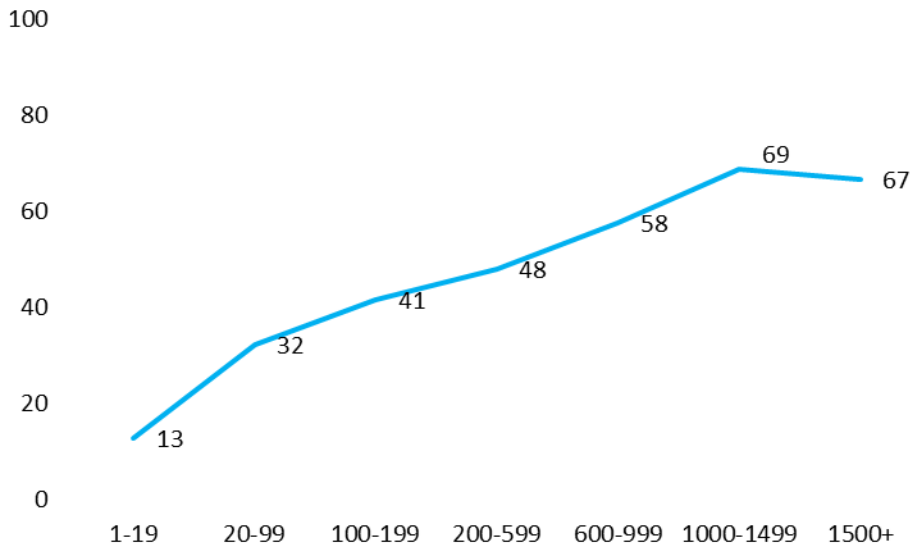
Table 42: TGA website –Frequent use by Stakeholder, Industry, and Health professionals (%)

How often do you visit the TGA information website?	
Category	**Weekly or more often**
Stakeholder category	
Health professional	12
Community	8
Medical prod ind	31
Retailer	12
Government	29
Academic	4
Media	0
Other	23
Medical products industry	
Product sponsor	37
Product manufacturer	14
Reg affairs cons't	60
Ind assoc'n rep	36
Other	20
Health professional	
Compl healthcare prac	13
Dental practitioner	0
Medical practitioner	7
Nurse	0
Pharmacist	38
Other	10

Stakeholder cat: Health professional: N=220; Community: N=13; Medical products industry: N=1340; Retailer: N=99; Gov: N=56; Academic: N=67; Media: N=2; Other: N=346. **Med prod Ind:** Sponsor: N=764; Manufacturer: N=396; Reg Affairs: N=116; Ind Assoc Rep: N=14; Other: N=44. **Health pro:** Complementary health: N=24; Dental: N=8; Medical Prac: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=91.

Within the Medical products industry, the most frequent use is strongly moderated by the size of the organisation (as indicated by the number of employees; Figure 66). Use weekly or more often increases steadily with increasing organisational size and is highest amongst those with employees in the 600-999 (58%), 1,000-1,499 (69%) and 1500+ (67%) employee levels. Within the sub categories identified in the Medical products industry group, Regulatory affairs consultants (60%) Product sponsors (37%) and Industry association representatives also show high levels of frequent access to the site (Table 42).

Figure 66: TGA information website – Frequent use (Weekly or more) by employee numbers (Medical products industry)



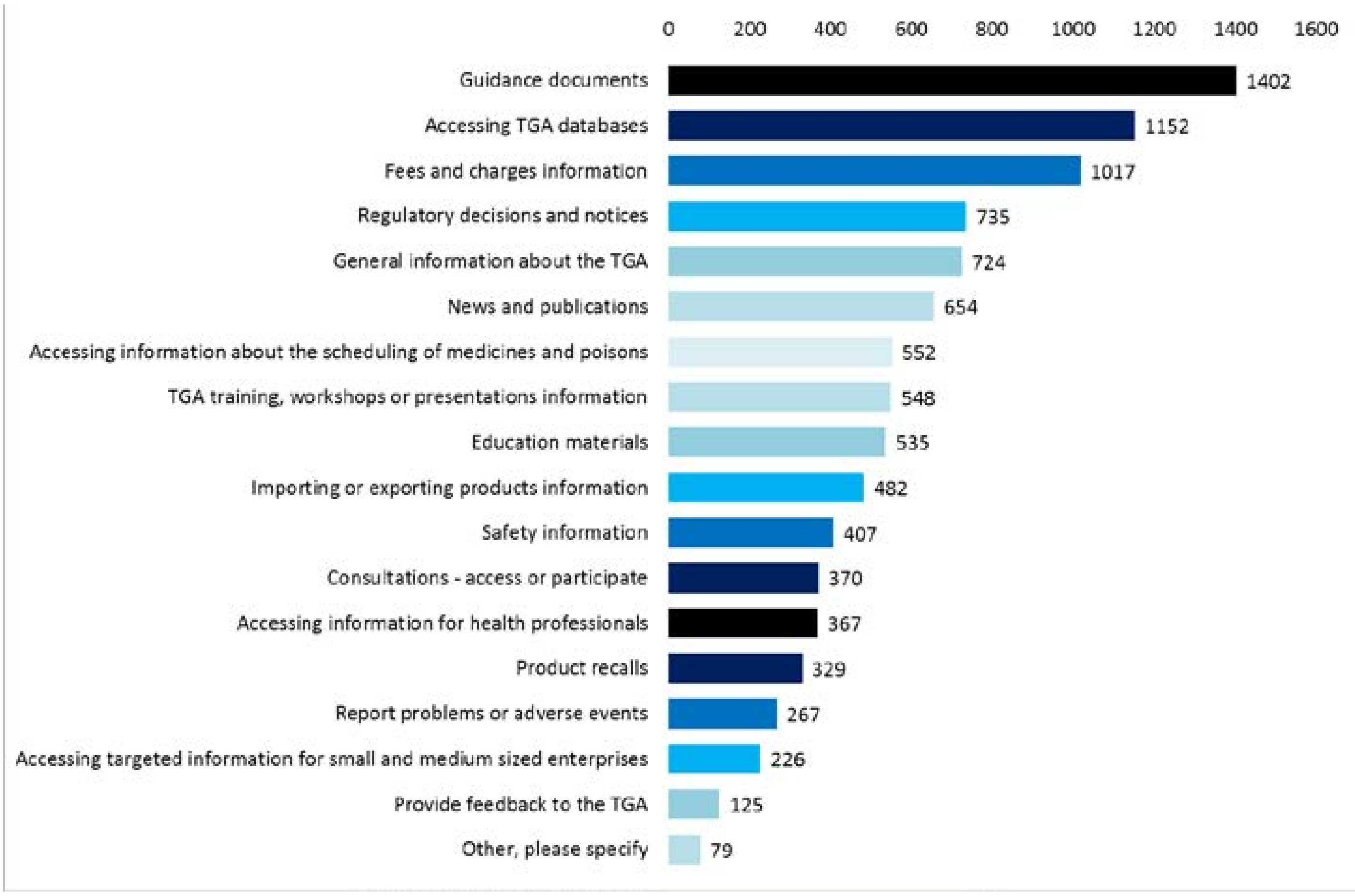
Participants highlight a range of reasons for use of the website (Figure 67). The most common reasons include to Seek guidance documents, Access databases and Seek fees and charges information.

In addition to the reasons pre-coded in the survey, participants commonly highlight the following reasons in the open text field made available in the survey:

- ARTG information and certificates.
- Clinical trials.
- Searches – general.
- Accessing forms.
- Labelling and advertising information and requirements.
- Ingredient reviews.
- Manufacturing requirements.
- Links to other sites.
- Study information updates.
- Provide updates to the TGA.

The pattern of identified reasons is highly consistent with the 2016 results. Further, the website continues to offer a range of services for stakeholders, with each of the reasons for use presented to survey participants selected by substantial numbers. To maximise use of the site and minimise demand through other more time intensive communication channels, ongoing monitoring of the site should focus on identifying unaddressed information needs of users and identifying difficult to find information. This could be achieved through intercept monitoring sampling a small proportion of visitors to the site.

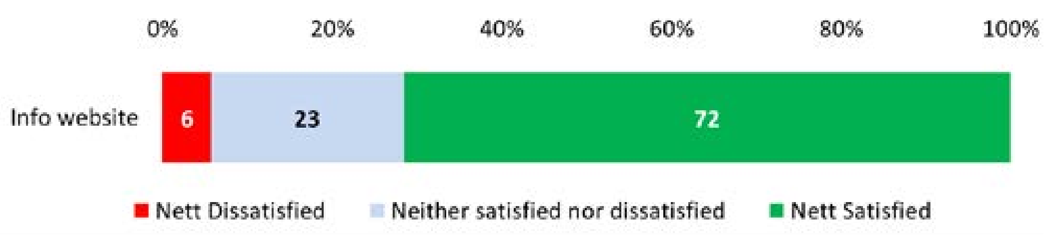
Figure 67: TGA website – Reasons for visiting (N)



Website satisfaction

Satisfaction with the website is strong, with 72% either Satisfied or Very satisfied and a minimal 6% of people showing any level of dissatisfaction (Figure 68). This outcome is generally consistent with 2016, when Nett satisfaction was slightly lower (69%) and Nett dissatisfaction was marginally higher (7%; Table 43).

Figure 68: TGA website – Satisfaction (%)



N=1,953

Table 43: TGA website – Overall satisfaction – 2016 vs 2017

How satisfied are you with the TGA information website?							
	Nett Dissatisfied	Neither	Nett Satisfied	Nett Dissatisfied	Neither	Nett Satisfied	Change Nett Satisfaction
	2017			2016			
Info website	**6**	23	**72**	**7**	24	**69**	2

Amongst broad stakeholder categories, Nett satisfaction varied from at or above 70% amongst those in the Medical products industry, Community and Retailer categories down to 56% for Government stakeholders, although for Government stakeholders this does not translate into greater levels of dissatisfaction (Table 44). Importantly, Dissatisfaction is also consistently low.

Table 44: TGA website – Overall satisfaction by stakeholder category, Industry and Health professionals (%)

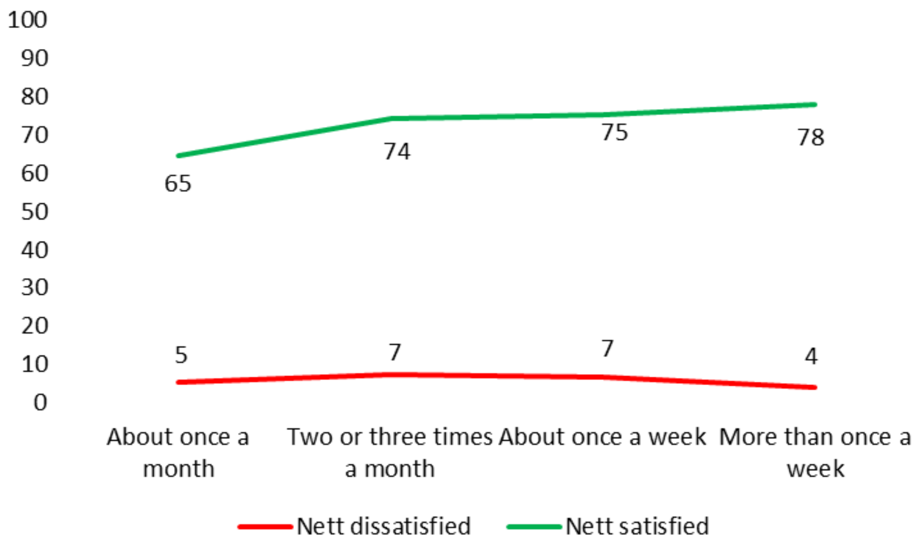
Category	Nett Dissatisfied	Neither	Nett Satisfied
Stakeholder category			
Health professional	6	28	66
Community	0	25	75
Medical prod industry	5	21	74
Retailer	8	20	71
Government	4	41	56
Academic	11	20	69
Media	0	0	100
Other	5	24	71
Medical products industry			
Product sponsor	5	21	74
Product manufacturer	5	21	74
Reg affairs consult	5	19	76
Industry association representative	14	43	43
Other	5	28	68
Health professionals			
Comp healthcare prac	5	43	52
Dental practitioner	14	43	43
Medical practitioner	0	30	70
Nurse	14	14	71
Pharmacist	0	25	75
Other	8	26	66

Stakeholder cat: Health professional: N=188; Community: N=12; Medical products industry: N=1228; Retailer: N=84; Gov: N=54; Academic: N=61; Media: N=1; Other: N=297. **Med prod ind:** Sponsor: N=711; Manufacturer: N=346; Reg Affairs: N=111; Ind Assoc Rep: N=14; Other: N=40. **Health pro:** Compl health: N=21; Dental: N=7; Medical Prac: N=33; Nurse: N=14; Pharmacist: N=28; Other: N=80.

The strong overall result amongst the key group of Medical products industry stakeholders includes a strong disparity between the Product sponsor, Product manufacturer and Regulatory affairs consultant groups (74-76% Nett satisfied), who all show strong satisfaction levels, and the small group of Industry association representatives, who are considerably less positive (43% Nett satisfied). Within the small sub-groups of medical professionals, Nurses, Medical practitioners and Pharmacists all showed strong Nett satisfaction (70-75%).

Familiarity gauged through the frequency of use of the site also appears to play a role in the satisfaction (Figure 69). In particular, those who use the site least show lower Nett satisfaction levels (65% increasing to 78% for the most frequent users).

Figure 69: TGA website – Satisfaction by frequency of use (%)



N=1,953

Feedback on the TGA website included an opportunity to provide comments outlining the reasons for the overall rating of the site. These comments highlight the importance of the website to a broad range of users. Feedback includes a strong focus on navigation, content, ease of identifying and accessing relevant information and suggestions to enhance the experience of use of the website. Overwhelmingly the experience of users and the reasons they use to explain their overall ratings of the site focus on navigation and ease of finding information. Those who express satisfaction are equally as likely to identify these issues as those who express dissatisfaction.

TGA Business services website

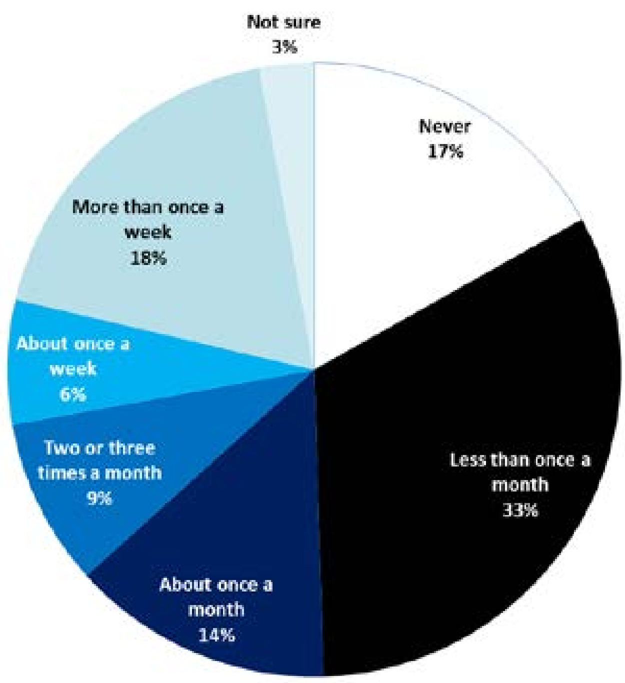
TGA Business services website - Use

Eighty two percent (82%) of the responding sample highlight that they use the TGA business services website (Table 45 and Figure 70). Around one in four are regular users of the site, accessing it either About once a week (7%) or More than once a week (18%) and one third (33%) used the site Less than once a month. The usage levels identified in the survey are highly consistent with those identified in the 2016 survey.

Table 45: TGA Business services website - Frequency of use (%)

How often do you visit the TGA Business Services website?		
Year	**2017**	**2016**
Never	17	19
Less than once a month	33	32
About once a month	14	12
Two or three times a month	9	10
About once a week	7	6
More than once a week	18	19
Not sure	3	2
N	**2153**	**2391**

Figure 70: TGA Business services portal – Frequency of use



N=2,153

Use of the site varies markedly across stakeholder categories (Table 46), with those identifying in the Medical products industry and Government categories most likely to highlight using the

Business services website Monthly or more often. Medical products industry stakeholders are also associated with the highest user rates, with only 13% of this group Never using the site. Health professionals, Retailers, Community members and Academics tend to show lower frequency of use and in most cases higher levels numbers of those who Never access the site.

Table 46: TGA Business services website – Frequency of use by Industry, Community and Health professional categories (%)

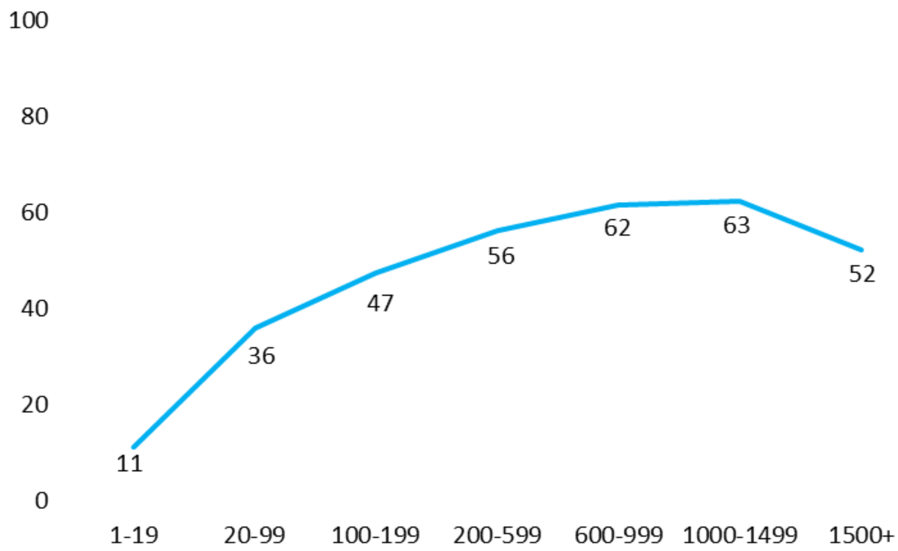
How often do you use the TGA Business services website?		
Category	**Never**	**Monthly or more often**
Stakeholder category		
Health professional	32	25
Community	31	23
Medical products industry	13	55
Retailer	21	28
Government	21	45
Academic	26	26
Media	50	50
Other	19	44
Medical products industry		
Product sponsor	5	66
Product manufacturer	11	44
Regulatory affairs consultant	3	84
Industry association representative	0	71
Other	9	50
Health professional		
Complementary healthcare practitioner	25	29
Dental practitioner	25	0
Medical practitioner	63	11
Nurse	35	18
Pharmacist	28	31
Other	20	31

Stakeholder cat: Health pro: N=219; Community: N=13; Med prod ind: N=1336; Retailer: N=99; Gov: N=56; Academic: N=66; Media: N=2; Other: N=341. **Med prod ind:** Sponsor: N=762; Manufacturer: N=396; Reg Affairs Con: N=115; Ind Assoc Rep: N=14; Other: N=43. **Health pro:** Comp health: N=24; Dental: N=8; Med pro: N=46; Nurse: N=17; Pharmacist: N=29; Other: N=90.

Within the Medical products industry, Regulatory affairs consultants (85% Accessing monthly or more often), Industry association reps (71%) and Product sponsors (66%) show high levels of access. In each of these sub-categories 5% or less highlight that they Never access the Business services site. Product manufacturers show generally lower overall use, with one in ten (11%) indicating they *Never* use the site and less than half (44%) using it monthly or more often.

Frequency of use, in particular in the most frequent use categories of once a week or more, is strongly associated with the number of employees of companies in the Medical products industry (Figure 71). Frequent levels of use are lowest in smaller companies and rise steadily to their highest levels amongst companies with 200-599 (56%), 600-699 62%) and 1000-1499 (63%) employees.

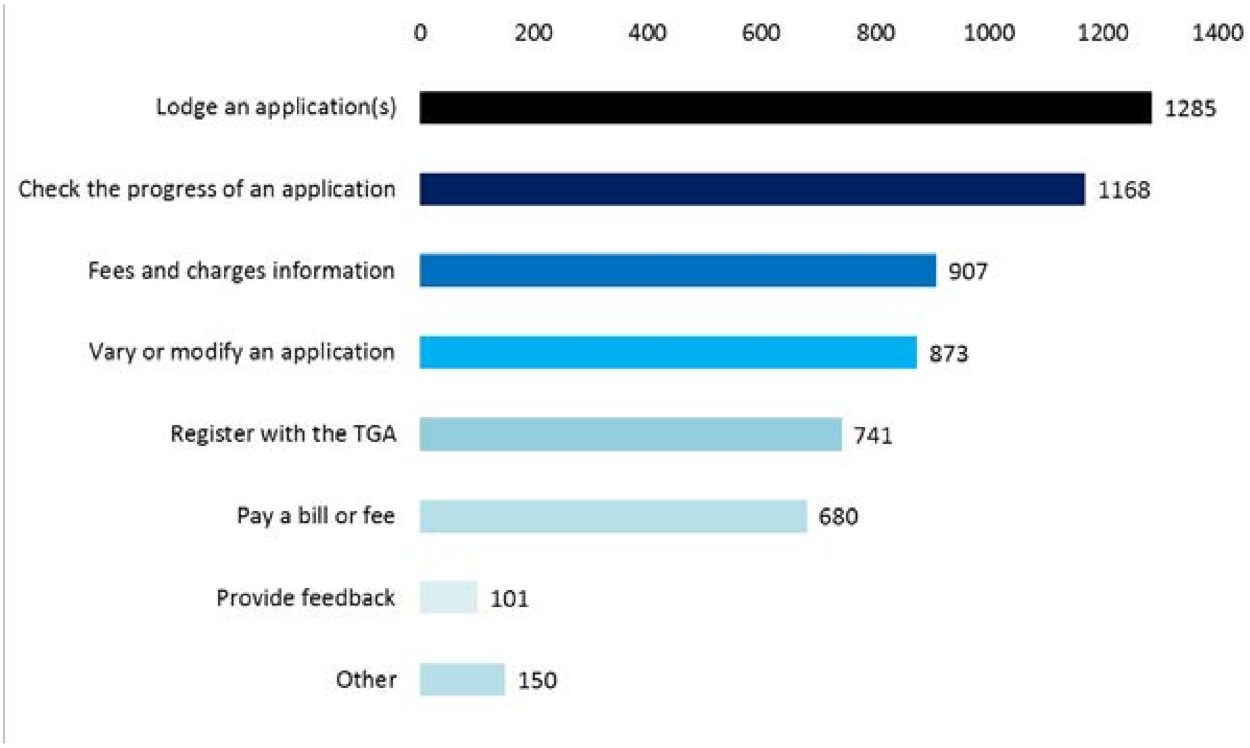
Figure 71: TGA business services website – Frequent use (Weekly or more) by employee numbers (Medical products industry - %)



The small numbers of Nurses, Medical and dental practitioners in the survey showed low or no usage of the Business services site. Pharmacists, Complementary health practitioners and Other health professionals reported higher usage at around one third of respondents (Table 46). In addition, substantial proportions of respondents in these groups report Never using the site, including around two thirds of medical practitioners, one third of Nurses and one in four Dentists, Pharmacists and Complementary healthcare practitioners.

Reasons for visiting the Business services site most commonly relate to Lodgement of applications or Checking the progress of applications as well as Varying or modifying an application (Figure 72). Other administrative processes including Paying bills or fees, Registering and Seeking information about fees and charges are also commonly identified as reasons for visiting the site.

Figure 72: TGA business services website – Reasons for visiting (N)



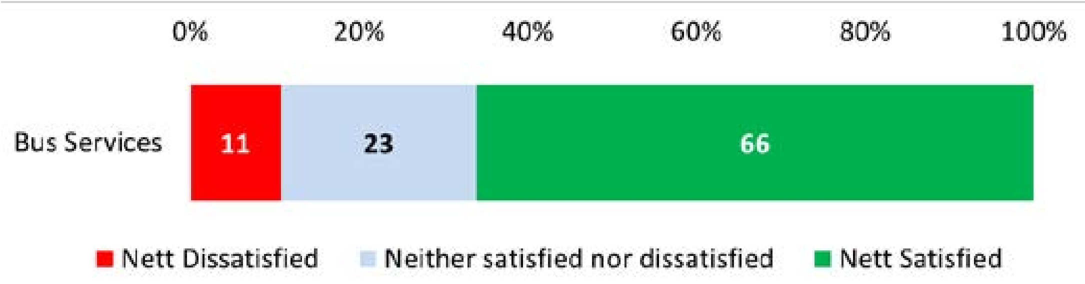
Other reasons for accessing the business services website identified in free text responses include:

- Access data bases.
- Adverse event reporting.
- ARTG cancellations, updates, certificates and information.
- Update information - e.g. contact info; company information; registrations.
- Audits – information and updates.
- GMDN code checks.
- Checking or identifying ingredients.
- Clinical trial notifications.
- Complete a draft or dummy application.
- General information.
- Password resets.
- Establish access for team/staff.
- View record summary documents.

TGA Business services website – Satisfaction

Satisfaction with the Business services website is generally strong, with 66% highlighting that they are either Satisfied or Very satisfied and just over one in ten (11%) showing dissatisfaction (Figure 73). This outcome is almost identical to that observed in 2016, when 65% highlighted satisfaction and 11% said they were dissatisfied with their experience.

Figure 73: TGA business services website – Satisfaction (%)



N=1,707

Satisfaction is highest amongst those in the Medical products industry (69%), Retailers (71%) and the small numbers of Community respondents (88%). Lower levels of satisfaction and slightly higher levels of dissatisfaction are identified amongst Health professionals (55%), Government (45%) and Academic (51%) users (Table 47). This finding is generally consistent with the previous results and is likely to reflect the diverse information needs of these groups. Strategies to provide guidance and support for users accessing the site that have needs or circumstances that fall outside the norm may assist these users.

Within the Medical products industry, satisfaction is generally strong, with both high levels of satisfaction and very low levels of dissatisfaction across Product sponsor (74% Nett satisfaction; 5% Nett dissatisfaction), Product manufacturer (74% and 5%) and Regulatory affairs consultant groups (76% and 5%; Table 47). The exception here is the Industry association group, where Nett satisfaction is at 43% and Nett dissatisfaction is at 14% amongst the 12 survey participants.

Within the health professional grouping, satisfaction with the site is highest amongst Nurses (64%), Pharmacists (65%) and Other (61%) groups (Table 47). Medical practitioners (31%), Dental practitioners (40%) and Complementary healthcare practitioners (47%) showed low levels of nett satisfaction (although the sample sizes across these groups are small).

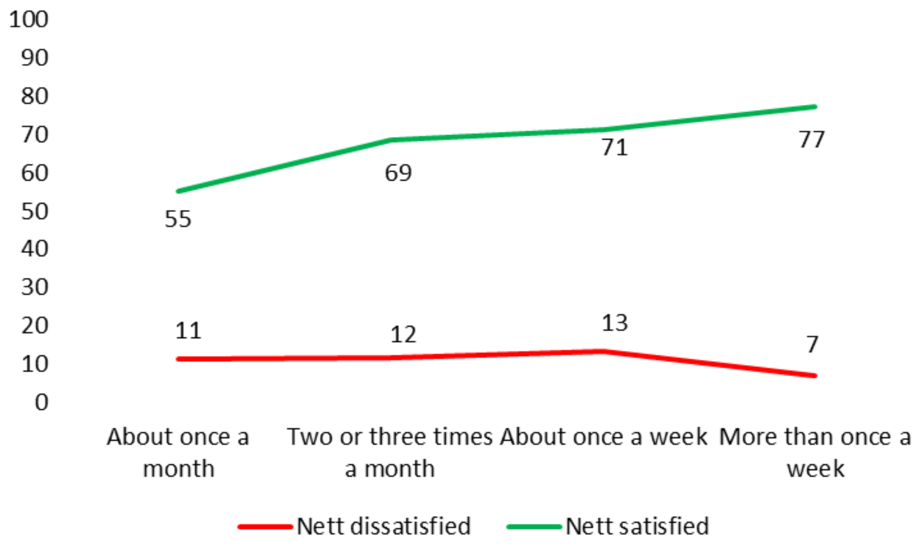
Table 47: TGA business services website – Overall satisfaction by stakeholder category, Industry and Health professionals (%)

Category	Nett Dissatisfied	Neither	Nett Satisfied
Stakeholder category			
Health professional	13	32	55
Community	13	0	88
Medical prod industry	9	21	69
Retailer	13	17	71
Government	23	32	45
Academic	22	27	51
Media	0	0	100
Other	10	27	63
Medical products industry			
Product sponsor	5	21	74
Product manufacturer	5	21	74
Reg affairs consultant	5	19	76
Industry association rep	14	43	43
Other	5	28	68
Health professionals			
Compl healthcare prac	18	35	47
Dental practitioner	0	60	40
Medical practitioner	13	56	31
Nurse	18	18	64
Pharmacist	10	25	65
Other	13	26	61

Stakeholder cat: Health pro: N=141; Community: N=8; Med prod ind: N=1125; Retailer: N=72; Gov: N=44; Academic: N=49; Media: N=1; Other: N=259. **Med prod ind:** Sponsor: N=681; Manufacturer: N=294; Reg Affairs Con: N=106; Ind Assoc Rep: N=12; Other: N=28. **Health pro:** Comp health: N=17; Dental: N=5; Med pro: N=16; Nurse: N=11; Pharmacist: N=20; Other: N=69.

For the business services site, the impact of familiarity with the site upon Nett satisfaction appears even stronger than is observed in relation to the information website (Figure 74). Amongst those who use the site least often, Nett satisfaction is observed at 55%, rising to 77% amongst the most regular users.

Figure 74: TGA business services website – Satisfaction by frequency of use (%)



N=1,707

An opportunity to provide comments and feedback on the Business services website elicited a range of comments. Consistent with the previous survey, these focussed upon the functionality, structure, navigation, operation and content of the site. Where there is dissatisfaction, themes also often identified frustrations with the frequency of password resets, issues with user friendliness and a lack of intuitive function, common outages and operational issues (or 'bugs').

TGA activities – Information sessions, Consultative processes and Events

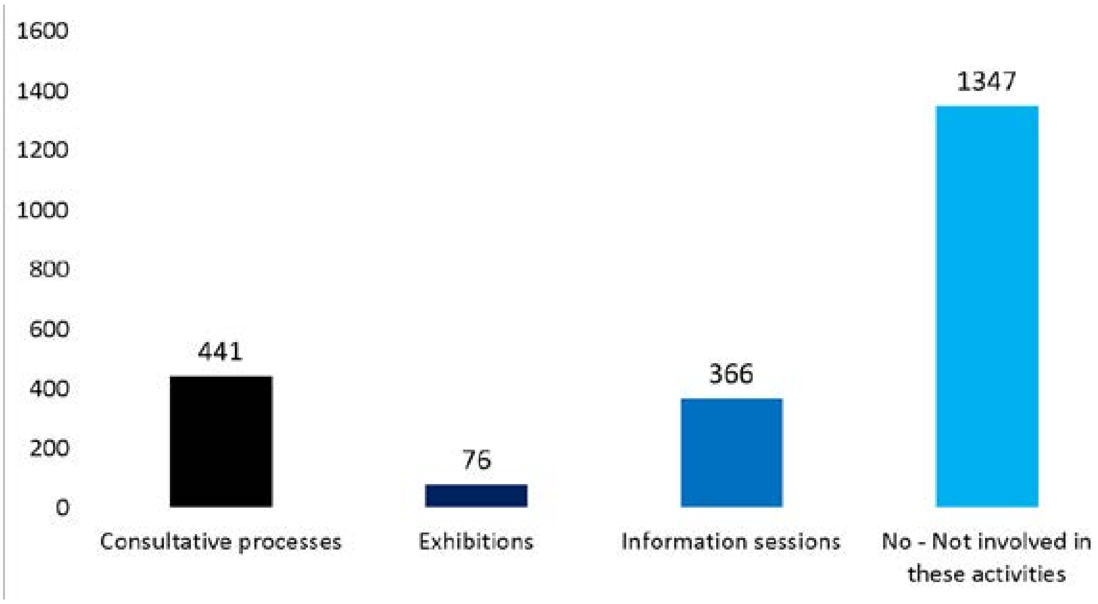
Involvement in TGA activities

A total of 608 participants in the survey highlighted involvement in activities conducted by the TGA in the last 12 months (Table 48 and Figure 75). This represents around just over three in ten responses to this question. The most common participation was in the form of a consultation process (441) or information session (366).

Table 48: Involvement in TGA activities

In the last 12 months, have you been involved in any of the following activities conducted by the TGA?	
Activity	**n**
Consultative processes (e.g. responding to consultation documents)	441
Exhibitions (e.g. TGA booth at conference)	76
Information sessions	366
No - I have not been involved in any of these activities	1347

Figure 75: Involvement in TGA activities



Most participants who highlight participation, indicate involvement in a single activity, however just fewer than 4 in 10 had participated in more than one activity (Table 49).

Table 49: Involvement in TGA activities – Number of activities

Number of activity selections	n
1	373
2	195
3	40
Average	**1.5**

Activities

A range of specific participation in consultations and events is identified. Involvement levels identified are shown in tables 50 and 51.

Table 50: Participation – Consultations (N)

Which consultations were you involved with during the last 12 months?	
Consultation	**N**
Changes to accessing unapproved therapeutic goods	130
Expedited pathways for prescription medicines	118
Options for the future regulation of low risk products	107
Criteria for comparable overseas regulators	106
Provisional Approval pathway for prescription medicines	106
Accelerated assessment of medical devices: Priority review pathway	101
The Regulatory framework for advertising therapeutic goods	98
Reforms to the regulatory framework for complementary medicines	97
Orphan drug program	87
Risk management plans for medicines and biologicals	84
Strengthening monitoring of medicines in Australia - enhanced medicines vigilance	81
Comparable overseas regulators - medical devices	81
Designation of Australian conformity assessment bodies for medical devices	54
TGA - enhancing sanctions and penalties in the Therapeutic Goods Act 1989	46
Guidance on variations to biologicals included in the Register	44
NSAID medicines: proposed advisory statement	33
Regulation of autologous cell and tissue products	29
Biovigilance responsibilities of sponsors of biologicals	29
Paracetamol and Ibuprofen: advisory statements for medicines	28
Scheduling Policy Framework & advertising controls of Pharmacist-only medicines review	25
Therapeutic Goods Order No 93 - Standard for Medicinal Cannabis	20
Revision of TGO 75 standard for HPCs derived from cord blood	11
Other	52

Table 51: Participation – Events (N)

Which event(s) did you attend in the last 12 months?	
Event	**N**
ARCS Scientific Congress (Canberra) - 10 August 2016	156
15th World Congress on Public Health 2017 (Melbourne) - 3 April 2017	11
Other	131

In addition to the events listed in the survey, participants also highlighted a range of "*Other*" involvement with TGA. This includes the following specific contacts and events:

Events

- ARCS Sessions
- Ausbiotech
- Biotherapeutics Association of Australasia Workshop
- CMA information day
- Codeine forum
- Department of health and Human Services Annual Workshop
- eform workshops
- IRIS information session
- ISCT event
- Medical device training/workshop
- Minor variation workshop
- MTAA conference
- Post market training and workshops
- RMP workshops
- Webinar events

Consultations

- Post market survey
- Application processes
- Authorised prescriber scheme
- Special access schemes
- Clinical guidelines
- Clinical trials
- Compounding guidelines
- Data on sunscreen products
- EDI initiative
- Minor variations
- IVD
- Labelling
- Medicinal cannabis
- Medicines shortages working group
- Pharmacovigilance
- Scheduling consultations

Satisfaction with activities

Respondents were asked to highlight their satisfaction with a range of statements relating to the events they had participated in (Table 52). Satisfaction with consultations remain generally positive, with most measures consistent with the previous year's findings. Importantly, very few people are dissatisfied. Notable outcomes here include a rise in the satisfaction with the ability to provide feedback (Nett satisfaction 2017 71%; 2016 67%), strong satisfaction with the information provided throughout the consultation process (76%) and a continued generally low satisfaction with follow up processes (49% Nett satisfaction).

Feedback on exhibitions remain strong, with the quality and overall satisfaction with the exhibitions both observed at 72% Nett satisfaction. Satisfaction with the informativeness of exhibitions fell from 75% in 2016 to 68% in 2017. This reflects a general trend across these measures for slightly lower outcomes in comparison to ratings of exhibitions in 2016.

Table 52: Event satisfaction – 2016 vs 2017 (%)

How satisfied were you with the following features of the event(s) you attended?							
	Nett Dissatisfied	Neither	Nett Satisfied	Nett Dissatisfied	Neither	Nett Satisfied	Change Nett Satis
Feature	2017			2016			
Consultation procedures	**7**	27	**66**	**10**	23	**67**	-1
Information provided in the consultation documents	**6**	18	**76**	**7**	19	**74**	2
Simplicity of the consultation processes	**8**	27	**65**	**10**	23	**67**	-2
Follow up on consultation processes	**14**	36	**49**	**22**	31	**47**	2
Ability to provide input and feedback on the consultation	**8**	21	**71**	**9**	25	**67**	5
Informativeness of the Exhibition	**2**	30	**68**	**0**	25	**75**	-7
Quality of the Exhibition	**2**	26	**72**	**0**	25	**75**	-3
Overall satisfaction with Consultations	**8**	26	**67**	**12**	25	**63**	4
Overall satisfaction with Exhibitions	**3**	25	**72**	**0**	25	**75**	-3

N=147-394

Satisfaction with consultations varies markedly across stakeholder categories, however the small sample sizes in all except the Health professional and Medical products industry categories make comparison difficult (Tables 53-55). Consistent with the 2016 findings, there is a slight tendency for those in the Medical products industry to show slightly higher satisfaction and lower dissatisfaction than health professionals. This is the case in relation to Information provided in the consultation documents, Simplicity of processes, Ability to provide input and feedback on the consultation and Overall satisfaction.

Due to the very small numbers of respondents in all except the Medical products industry category, comparison of outcomes across stakeholder categories in relation to exhibitions is not reliable.

Table 53: Event satisfaction – Consultations – by Stakeholder category – Part A

How satisfied were you with the following features of the event(s) you attended?	Consultation procedures		Information provided in the consultation documents		Simplicity of the consultation processes		Follow up on consultation processes	
Professional category	Nett Dissatisfied	Nett Satisfied	Nett Dissatisfied	Nett Satisfied	Nett Dissatisfied	Nett Satisfied	Nett Dissatisfied	Nett Satisfied
Total	**7**	**66**	**6**	**76**	**8**	**65**	**14**	**49**
Health professional	7	64	7	67	14	55	16	47
Community member	-	-	-	-	-	-	-	-
Medical products industry	7	67	5	77	7	67	13	52
Retailer	0	100	0	100	0	75	0	50
Government	13	38	0	75	0	50	13	25
Academic	0	67	0	83	0	83	17	67
Media	-	-	-	-	-	-	-	-
Other	10	66	10	76	12	58	25	42

Health pro: N=6-45; Community: N=0-0; Med prod ind: N=116-281; Retailer: N=1-4; Gov: N=3-8; Academic: N=4-6; Media: N=0-0; Other: N=17-50.

Table 54: Event satisfaction – Consultations – by Stakeholder category – Part B

How satisfied were you with the following features of the event(s) you attended?	Ability to provide input and feedback on the consultation		Informativeness of the Exhibition		Quality of the Exhibition	
Professional category	Nett Dissatisfied	Nett Satisfied	Nett Dissatisfied	Nett Satisfied	Nett Dissatisfied	Nett Satisfied
Total	**8**	**71**	**2**	**68**	**2**	**72**
Health professional	10	59	0	100	0	100
Community member	-	-	-	-	-	-
Medical products industry	7	74	2	67	2	69
Retailer	25	50	0	0	0	0
Government	0	63	33	67	33	67
Academic	0	83	0	75	0	75
Media	-	-	-	-	-	-
Other	12	69	0	71	0	82

Health pro: N=6-45; Community: N=0-0; Med prod ind: N=116-281; Retailer: N=1-4; Gov: N=3-8; Academic: N=4-6; Media: N=0-0; Other: N=17-50.

Table 55: Event satisfaction – Consultations – by Stakeholder category – Part C

How satisfied were you with the following features of the event(s) you attended?				
	Overall satisfaction with Consultations		Overall satisfaction with Exhibitions	
Professional category	Nett Dissatisfied	Nett Satisfied	Nett Dissatisfied	Nett Satisfied
Total	**8**	**67**	**3**	**72**
Health professional	12	57	0	100
Community member	-	-	-	-
Medical products industry	8	68	2	72
Retailer	0	67	0	0
Government	0	57	33	67
Academic	0	83	0	50
Media	-	-	-	-
Other	6	65	6	71

Health pro: N=6-45; Community: N=0-0; Med prod ind: N=116-281; Retailer: N=1-4; Gov: N=3-8; Academic: N=4-6; Media: N=0-0; Other: N=17-50.

Survey participants were invited to provide comments and suggestions in relation to TGA consultation, training, seminars and events. A total of 432 comments were received, covering a broad range of focus areas.

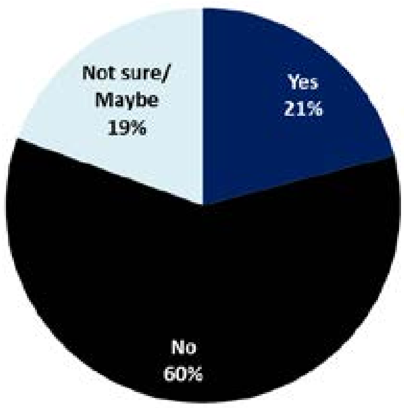
SME Assist

Awareness and use of SME assist

Industry respondents with less than 200 employees were asked a series of questions about the TGA's SME assist portal. Amongst this group (N=898), around one in five (21%) are aware of SME assist (Figure 76). A similar number (19%) are Not sure or thought that they may have been aware of the portal, while the remainder, representing 60% of the group is Not aware.

Awareness levels are generally similar amongst those who describe themselves primarily as Product sponsors and Product manufacturers (Table 56). Differences in awareness of SME assist are observed when considered in regards to the number of employees, with awareness rising from 18% amongst those who employee 1-19 people, to 24% for 20-99 employees and 29% amongst those employing 100-199 people (Figure 77). This increase in awareness did not translate to higher self-identified lack of awareness, with most of the changes driven by fewer respondents identifying themselves in the Not sure category.

Figure 76: SME Assist – Awareness (%)

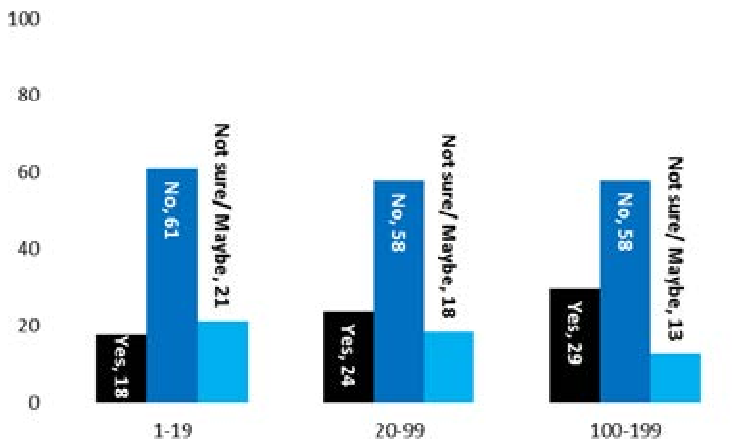


N=894

Table 56: Awareness of SME Assist – Medical products industry categories (%)

Are you aware of TGA's SME Assist?				
Role in Medical products industry	Yes	No	Not sure/ Maybe	N
Product sponsor	22	61	17	565
Product manufacturer	19	58	23	329

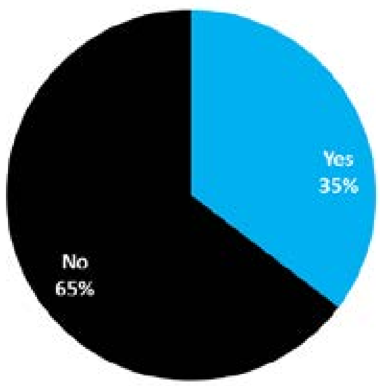
Figure 77: SME Assist – Awareness by SME employee numbers (%)



1-19: N=507; 20-99: N=292; 100-199: N=95.

Just over one third of those who are aware of SME assist have taken the additional step of accessing the portal (Figure 78). Overall this level of access represents 7% of the total eligible users who answered the survey. Access levels are slightly higher amongst Manufacturers when compared to Sponsors (38% versus 34%). In contrast to overall awareness, smaller businesses (with 1-19 employees), are more likely to have accessed the portal, with 40% of those who are aware of the portal having accessed it, compared to 31% for 20-99 and 29% for 100-199 employees (Figure 79).

Figure 78: SME Assist – Accessed (Aware of SME Assist only %)

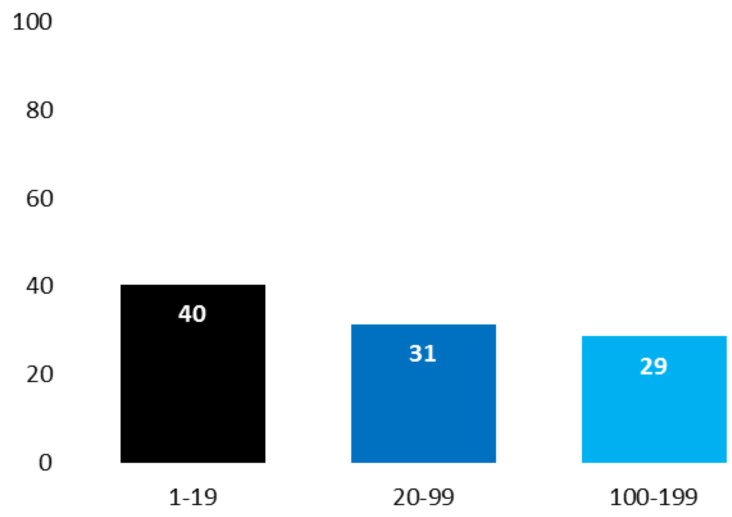


N=184

Table 57: Accessed SME Assist – Medical products industry categories (Aware of SME assist only %)

Accessed SME assist			
Role in Medical products industry	Yes	No	N
Product sponsor	34	66	124
Product manufacturer	38	62	60

Figure 79: SME Assist – Accessed by employee numbers (Aware of SME Assist only %)



1-19: N=89; 20-99: N=67; 100-199: N=28.

The general lack of awareness as well as the low overall use of the portal highlights an opportunity for further promotion and activities to encourage awareness and engagement with the portal amongst this target audience. Opportunities exist to target the range of relevant stakeholders here, including both sponsors and manufacturers as well as across the range of workforce sizes. A particular focus on smaller business structures represents a key opportunity area. The high numbers of organisations in the smaller employment category (1-19 employees represent 44% of those who identified the number of employees in their organisation; 20-99 25%; 100-199 8%), lower awareness amongst this grouping and the high level of engagement when awareness does occur highlights a particular opportunity for targeted promotion of the portal that will likely result in high uptake.

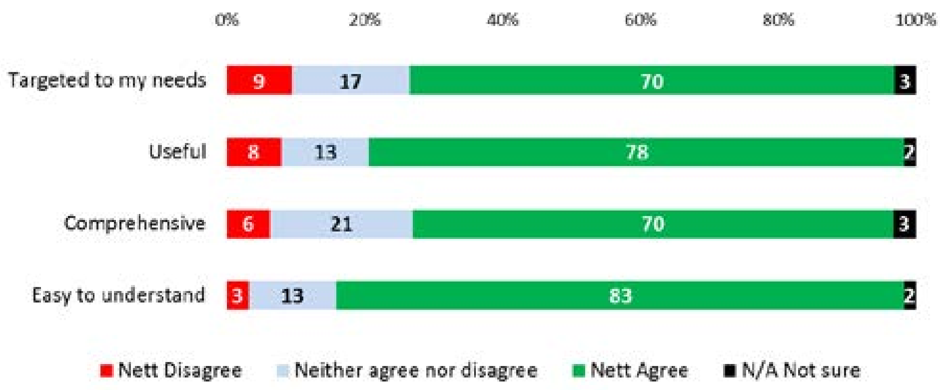
User ratings of SME assist

Amongst those who have used the SME assist portal the experience is generally positive (Table 58 and Figure 80). Seven in 10 or more responses received across the four measures in the survey highlight agreement with the statements presented, with fewer than one in ten identifying disagreement. In particular, users are finding the portal Easy to understand (83% Nett agreement and 3% Nett disagreement) and Useful (78% Nett agreement and 8% Nett disagreement). These outcomes indicate that the portal is well targeted to potential users and is generally likely to provide an overall positive experience for those who access it.

Table 58: SME Assist – User ratings (%)

I found the information in SME assist to be:					
Statement	Nett Disagree	Neither	Nett Agree	N/A Not sure	N
Targeted to my needs	**9**	17	**70**	3	64
Useful	**8**	13	**78**	2	63
Comprehensive	**6**	21	**70**	3	63
Easy to understand	**3**	13	**83**	2	63

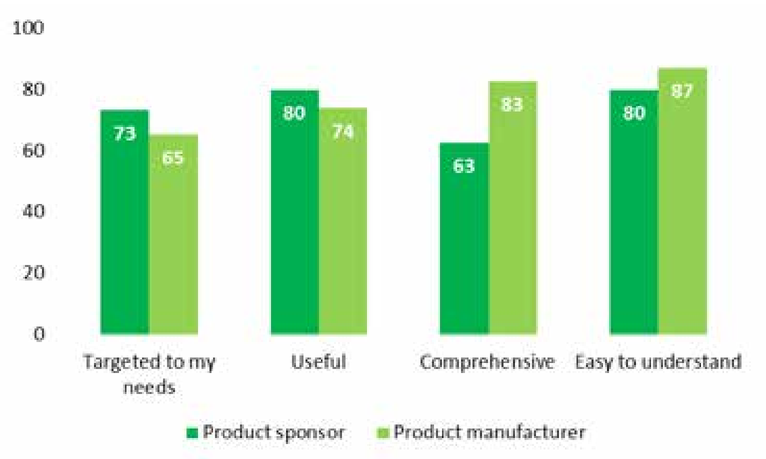
Figure 80: SME Assist – User ratings (%)



N=63-64.

Some variation in ratings across sponsors and manufacturers is evident (although the relatively small sample sizes in both groups limit the reliability of this finding). Sponsors are generally more likely to Agree that the portal is useful (Sponsors 80% Nett agreement vs Manufacturers 74%) and targeted to their needs (80% vs 74%; Figure 81). In contrast, manufacturers appear more likely to agree that the portal is comprehensive (63% vs 83%) and easy to understand (80% vs 87%).

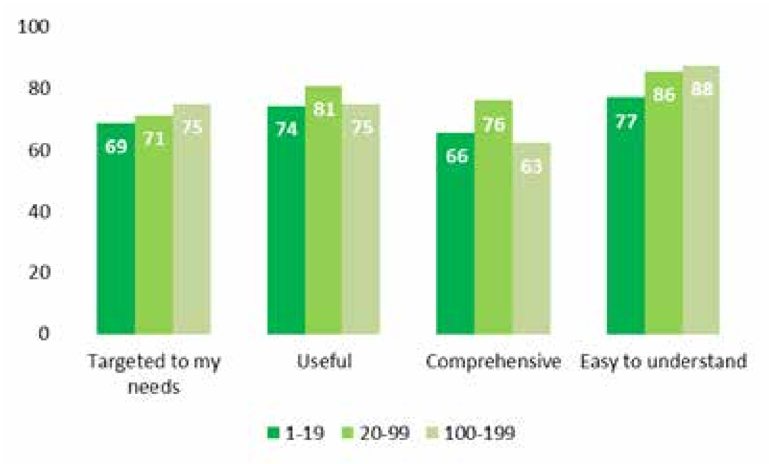
Figure 81: SME Assist User ratings Nett agreement - Medical products industry category (%)



Sponsors: N=40-41; Manufacturers N=23.

When considered by employee numbers, the targeting and ease of understanding of the portal shows a tendency toward higher ratings amongst larger workforce sizes (Figure 82). As is the case for other breakdowns here, the results are limited by the small sample sizes being analysed. For measures of usefulness and comprehensiveness a peak in positive ratings is observed in the middle grouping of 20-99 employees.

Figure 82: SME Assist User ratings Nett agreement – SME employee numbers (%)



1-19: N=34-35; 20-99: N=21; 100-199: N=8.