Australian Government

Department of Health

Therapeutic Goods Administration

TGA stakeholder survey 2018

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TGA Health Safety Regulation

Contents

Tables

Figures

Executive summary

An online survey was conducted amongst TGA stakeholders in June and July 2018. The survey replicated those conducted in 2016 and 2017 and provided opportunities for feedback across a range of service and activity areas.

A total of 2,274 valid 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 and Industry association representatives. In order to ensure a range of community views were captured, the 2018 survey was complemented by a separate community focussed survey. Results from the community survey are detailed in separate reporting.

Trust and balancing the risks

The TGA is trusted by the vast majority of key stakeholders surveyed. More than 85% trust the TGA to perform its role ethically and with integrity and only 6% expressed negative sentiment (disagreement) in relation to the statement. This result maintains the positive outcomes on this question seen in the survey since 2016 (2018 86%; 2017 88%; 2016 85%). Importantly, high levels of trust are recorded across all major stakeholder groupings.

Just under 7 in 10 respondents (69%) feel that the TGA gets the balance right between risks and benefits of therapeutic goods. Whilst representing a strong overall outcome, the level of disagreement on this statement (15%) highlights an opportunity for the TGA to improve its reputation in this area. Key potential groups to engage with in relation to this issue include Health professionals (particularly Complementary healthcare practitioners and Medical practitioners), Retailers and those in the Medical products industry.

Confidence in the TGA

Across a range of measures identifying the confidence levels of stakeholders in relation to a range of TGA focus areas there is broad variation in outcomes. Just under half of respondents highlight high or full confidence that the TGA clearly articulates reasons for its decisions (with a further 35% highlighting moderate confidence that this is the case). Similar outcomes are evident for measures of TGA transparency (50% High or full confidence; 33% Moderate confidence) and accountability (54% High or full confidence; 30% Moderate confidence). In each of these cases, between 16% and 17% highlight Low or No confidence. Measures relating to confidence that the TGA makes decisions based on scientific evidence (62% High or Full confidence; 29% Moderate Confidence; 9% Low or No confidence) and that the TGA is trustworthy (69% High or Full confidence; 24% Moderate; 6% Low or No confidence) show generally stronger outcomes.

Among the key stakeholder groupings identified in the survey, there is generally higher confidence expressed by Medical products industry and Government stakeholders across the range of measures. In contrast, Health professionals and Retailers tend to express lower levels of confidence. The lower confidence observed amongst Health professionals reflects a general trend across the range of health professional categories, with particularly low confidence expressed amongst Complementary healthcare practitioners.

The outcomes here highlight ongoing opportunities to focus on improvements in perceptions of accountability, transparency and clear articulation of decisions. In particular, a focus on clear, timely open communication and engagement with the range of stakeholders on key issues and decisions is likely to have positive impacts.

Collaboration, consultation and feedback

The 2018 results relating to measures of collaboration, consultation and feedback highlight continued improvements across all measures observed since 2016. Across the five measures tracked, there have been sustained increases of between 9% and 12% Nett agreement. The ability to provide feedback represents the strongest area, with 74% of stakeholders agreeing that they are able to do so (up from 62% in 2016). Participants in 2018 are also more likely to agree that the TGA Consults on relevant issues (up 11% since 2016 to 62%) and facilitates Opportunities to provide input (58% Nett agreement, up from 46% in 2016). Despite sustained improvements, ongoing opportunities exist to improve perceptions and experiences in relation to Collaboration (Nett agreement 55%) and Listening to feedback (51%). Targeting engagement, collaboration and feedback mechanisms toward specific stakeholder groupings is likely to facilitate improvements here. In particular, focussing on strategies that proactively engage with Health professionals, Academics and Retailers are warranted given their tendency to express lower levels of agreement with the statements.

Communication and information services

TGA stakeholders continue to use a range of contact and information channels. The most commonly used channels continue to be the TGA website (with almost universal use amongst stakeholders in the survey) and the eBusiness services portal. While the website based channels are most broadly used, the survey highlights evidence that uptake of other channels is increasingly occurring amongst stakeholders, with increases in the level of identified use observed in relation to email subscription services, the consultation forecast, RSS feed and TGA Twitter feeds.

There are large variations in the perceived usefulness of various information sources offered. TGA Guidelines and TGA news and updates are most universally found to be useful, with TGA updates, Safety information and eBS notices all showing relatively high levels of usefulness. Consistent with their targeted nature, Prescription medicine NCE registrations, Medicines shortages alerts and SME assist show lower levels of overall usefulness, although commonly this varies across specific audiences, such as Health professionals. The variation across stakeholder groups in the survey highlights the ongoing need to be mindful of specific information and communication needs of key target audiences.

Contact with TGA

Most commonly, contact with the TGA occurs irregularly, with around 7 in 10 highlighting they are in contact once a month or less frequently. Contact is most frequent amongst Government and Medical products industry stakeholders, including regular contact with Product sponsors, Regulatory affairs consultants and Industry association representatives. Contact is most commonly made via phone or email channels, with website based contact also accounting for a substantial number of contacts. Contact via Fax and Letter formats continue to decline and represent a very small proportion of the channels used by stakeholders.

Reasons for contact strongly reflect the core business processes of the TGA, with application lodgements and checking on the progress of applications representing the two most common reasons for making contact. Information related to manufacturing products, product recalls and issues related to problems with devices or medicines also feature strongly in the top reasons for contact.

Satisfaction with the contact made across various channels shows generally high levels of satisfaction for phone, email and website based contacts and lower satisfaction amongst other less utilised channels. Overall satisfaction with communications shows Nett satisfaction in 2018 at 68% (Nett dissatisfaction 12%). This is consistent with the 2017 outcome and maintains the gains made in comparison to the 2016 Nett satisfaction level of 63%. Satisfaction is strongest for Medical products industry and Government stakeholders, with Health professionals, Retailers and Academics all showing slight lower levels of Nett satisfaction and in the case of Retailers, high levels of dissatisfaction.

The time taken to respond to contacts continues to vary across contact methods. Overall, response times are in line with those tracked across previous years of the survey. Importantly, shorter response times continue to be strongly related to higher overall ratings of satisfaction with communications.

TGA website

The TGA website provides a common channel for contact with the TGA. Reported usage in 2018 is consistent with the patterns reporting in both 2016 and 2017, with a total of 91% of responses highlighting some use of the website.

Regular use of the website is most common for Medical products industry and Government stakeholders, with just under one in three of these groups highlighting use of the site weekly or more often. Amongst industry stakeholders, there is particularly high use by Regulatory affairs consultants, 59% of whom highlight use of the site on a regular basis.

Access to the site occurs for a broad range of reasons. Most commonly this includes use of TGA databases, access to guidance documents, fees and charges information and information related to regulatory decisions and notices. Use of available tools on the site is also commonly identified, almost nine in ten highlighting use of the website search function, just under two thirds using downloadable fact sheets and one in four using interactive tools such as decision trees. Ratings of the use of these tools indicate that just under half of those who have accessed interactive tools, fact sheets and videos feel that they are Very useful with very few respondents highlighting that the tools are Not useful. Usefulness of the search function is perceived to be lower, with 37% finding this tool Very useful and 8% highlighting it is Not at all useful.

Satisfaction ratings highlight that the website is viewed positively in relation to the Language used (81% Nett satisfied) and Length of content (77%). The overall look and feel of the site is also generally positively received, with 65% of users satisfied with this aspect and only 5% expressing dissatisfaction. Navigation of the site is less favoured, with 55% satisfaction and almost one in five dissatisfied with this aspect of the site. Further investigation of the barriers to effective navigation coupled with efforts to address the potential effectiveness of the search function may assist to address this lower level of satisfaction.

Overall satisfaction with the website showed a Nett satisfaction rating of 73% of users. This is in line with the outcome observed in 2017. Nett satisfaction is generally higher among Medical products industry stakeholders (74%) – particularly Regulatory affairs consultants (81%) - and lower for Health professionals (62%) and Retailers (63%).

Ongoing monitoring, testing and capture of site visit based (intercept) feedback is recommended to further identify specific areas for development and enhancement of the user experience.

TGA business services portal

Use of the Business services portal has remained constant across the three years of the survey, with 83% of participants in this year's survey highlighting some use of this resource. Generally use of the site is infrequent, with half using the site monthly or less often. Use of the site is highest amongst Medical products industry and Government stakeholder categories with industry based stakeholders both more likely to use the site and to use it more frequently than others.

Reasons for use of the site are consistent across the three years of the survey and highlight that the most common reasons for access are related to the core functions of the site, namely to lodge applications, check the progress of applications and seek information available on the site.

Satisfaction with the portal is consistent with previous years, with 68% Nett satisfaction (2017 66%). Satisfaction is highest amongst Medical products industry stakeholders, particularly core user groups of Product sponsors and Regulatory affairs consultants.

TGA activities and events

Just under 700 participants in the survey were involved in activities conducted by the TGA in the last 12 months. Most commonly this includes involvement in consultative processes, information sessions or webinars.

Around seven in ten consultation participants express satisfaction with the experience. Across the range of consultation focussed measures there is marked variation, with strong satisfaction in relation to the information provided, procedures employed and ability to provide input and feedback and relatively low levels of satisfaction with follow up processes.

Overall satisfaction with TGA booths (Nett satisfaction 82%), Information sessions (78%) and Workshops (95%) is generally high. Satisfaction with Webinars is lower at 71%.

Recent reforms by the TGA

Three in four survey participants indicate some interest in one or more recent reforms. Most commonly this centres around reforms focussing on the establishment of a priority review pathway; however, there is also strong interest across the range of reforms identified, particularly the list of permitted indications, provisional approval pathway and category C notifications focussed reforms. Interest in the reforms varies markedly across stakeholder groups, providing opportunities for targeted engagement and communication strategies to be employed.

General perceptions of the reforms highlight a strong neutral (Neither agree nor disagree) response, representing the most common response outcome across the range of statements presented. Beyond this tendency for neutrality in relation to reforms, it is notable that participants are generally more likely to agree than disagree that the reforms are beneficial, that they were prepared for the changes and that they received adequate information. Despite this it is notable that there are some opportunities to respond to perceived lack of information about the reforms, and to manage perceptions in regards to their potential adverse impact, particularly amongst Product sponsors, Pharmacists and Complementary healthcare practitioners where the level of disagreement with the statements presented is relatively high.

Engaging with the TGA through Facebook

A mixed response to the potential to engage with the TGA through Facebook is identified in the survey. More than half of participants highlight that they would be Unlikely (18%) or Very unlikely (36%) to do so. Among the remainder, 16% indicate they would be Likely to engage, 6% Very likely and just under one in four suggest they would possibly engage or were not sure if they would engage.

SME Assist

One third of survey participants from small and medium sized enterprises (SMEs) have heard of SME Assist and a further 38% of those who have heard of the service have accessed it. There is slightly higher awareness of for medium sized enterprises (20-199 employees) compared to small enterprises (1-19 employees). Where use is evident there is generally strong sentiment towards the SME resource. Eighty percent of users Agree or Strongly agree that the information provided is Targeted and 78% feel that the information is Useful.

Introduction

This report provides a summary of findings from the 2018 Therapeutic Goods Administration stakeholder survey.

Methodology

A survey of stakeholders of the TGA was conducted in June and July 2018. 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 Department of Health Market Research Unit. The 2018 survey largely replicates the 2016 and 2017 surveys, allowing identification of trends across years for key question sets.

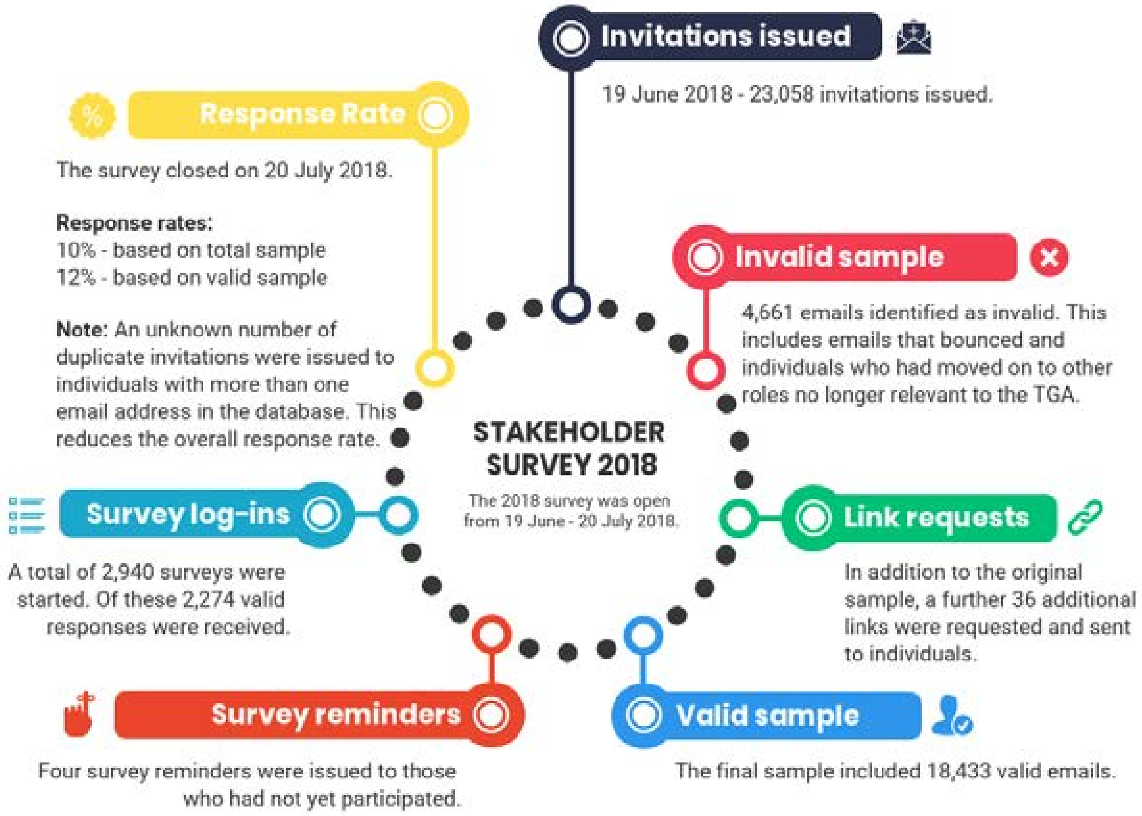
Key focus areas for the survey were:

- 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 19 June 2018 until 20 July 2018. During the survey period potential participants were invited to participate via an individualised email. To encourage participation, non-respondents were issued with up to four reminder emails throughout the survey period.

A total of 23,058 unique emails were sent an invitation to the survey. Response rates are outlined in Figure 1 below. As outlined, 4,661 emails were identified as invalid. Amongst the valid group of emails in the sample (n=18,433), 2,940 survey log-ins were recorded, with 2,274 providing valid responses to the survey. Based upon the invitation numbers, the final response rate for the survey is 10% (or 12% based upon the known valid sample of 18,433).

Figure 1: Survey fieldwork and response rates



Data was downloaded directly from the Qualtrics survey host site in .csv format. Analyses were conducted in Microsoft Excel. Analyses consisted of basic cross tabulations across all question sets and major variables of interest. Where available, comparison of results with the previous surveys conducted in 2016 and 2017 was also conducted.

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: Respondent roles (N) show the roles of respondents. Participation in the survey includes representation from across the range of industry and professional roles. It is notable that two thirds of respondents identify within the Medical products industry category, with just under 10% identifying as Health professionals and minor representation amongst other groupings.

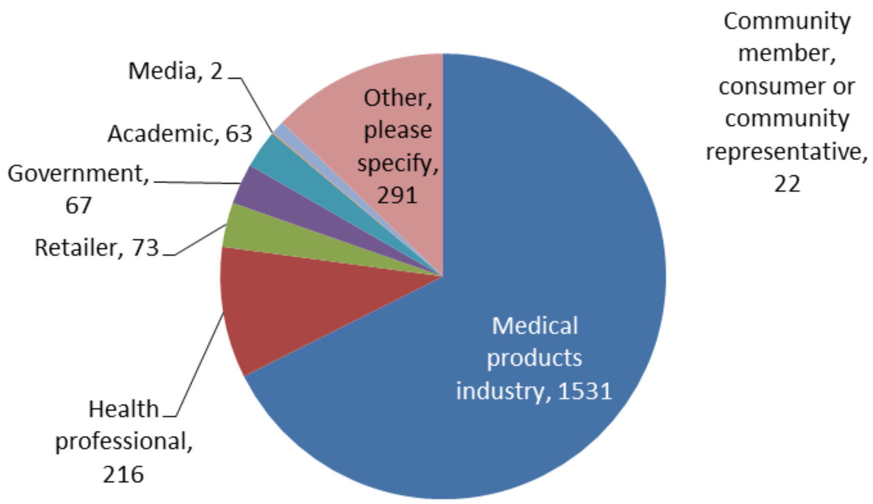
Table 1: Respondent roles

Which of the following best describes you?

Category	N	%
Medical products industry	1,531	67.3
Health professional	216	9.5
Retailer	73	3.2
Government	67	2.9
Academic	63	2.8
Media	2	0.1
Community member, consumer or community representative	22	1.0
Other, please specify	291	12.8

N=2,265

Figure 2: Respondent roles (N)



N=2,265

The small number of individuals identifying within the community grouping were routed to a modified community focussed survey that sought feedback from the broader community via both purchased sample and opt in participants. This survey is the subject of separate reporting and feedback from this group of 22 participants is not reflected in this report.

Among the large group of respondents who highlight a role in the Medical products industry, the most commonly identified role is that of Product sponsor. This group represents 61% of respondents in this category. Product manufacturers are also commonly identified, representing just under 3 in 10 (28%) Medical products industry participants. Consultants (7%) and Industry association representatives (1%) represented small numbers in the overall sample. These patterns are similar to previous years, although the representation of sponsors is slightly higher when compared to previous years.

Fifty six (56) participants identified in the Other category, these included a range of roles including:

- Distribution, services, importing and logistics;
- Ingredient supply and manufacture;
- Product design;
- Administration and accounts;
- Pharmacovigilance;
- Regulatory affairs;
- CRO;
- Consultants;
- Packaging;
- 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	932	61.1
Product manufacturer	422	27.7
Regulatory affairs consultant	105	6.9
Industry association representative	11	0.7
Other, please specify	56	3.7

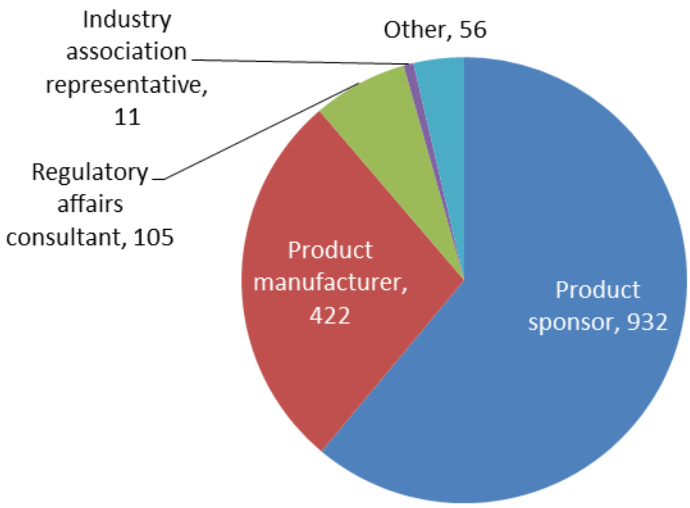
How many employees work for the company in Australia?

Employees	N	%
1-19	592	43.9
20-199	434	32.2
200-599	221	16.4
600-999	52	3.9
1000-1499	27	2.0
1500+	22	1.6

Medical products industry N=1,526; Employee numbers: N= 1,348.

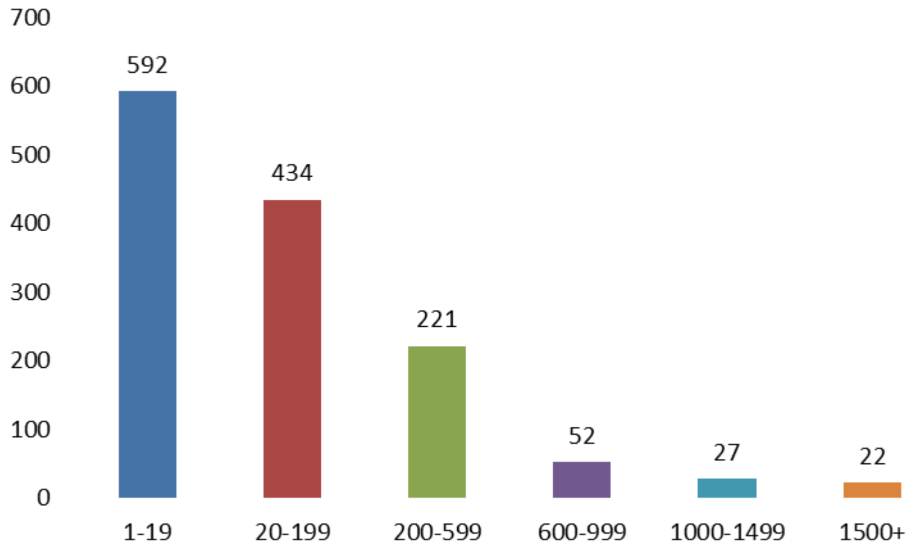
More than four in ten (44%) of those working in the medical products industry worked in small organisations of fewer than 20 employees (Table 2). One third (32%) identify 20-199 employees, with a further 16% in organisations with 200-599 employees. Consistent with previous years, small numbers are identified within large organisations employing 600 or more people (600-999, N=52, 4%; 1000-1499 N=27, 2%; 1500+, N=22, 2%).

Figure 3: Medical products industry – respondent role



N=1,526

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



N=1,348

Amongst both Product sponsors and Product manufacturers, Medical devices are the most commonly identified products (Sponsor N=616; Manufacturers N=229). Prescription medicines are the second most commonly identified products amongst product sponsors (N=346) and the third most identified category amongst manufacturers (N=76).

Over the counter medicines and complementary medicines are also commonly identified. Complementary medicines represent the second most common category identified by Product manufacturers (N=83) and the third most commonly identified amongst Sponsors (N=206). Over the counter medicines showed similar (although slightly lower) levels (Manufacturers N=60; Sponsors N=203).

Of the 932 responses received from Product sponsors, 284 (30%) identify more than one category, with 134 selecting two categories, 87 selecting three, 63 selecting four and 6 responses identifying four of the 6 categories (Average number of selections: 1.6). Multiple selections most commonly include one or more medicines categories and the medical devices category.

Among the 421 manufacturers who described their products, 67 (16%; Average number of responses 1.3) recorded more than one response. More than half of these identified only 2 categories (N=35). Consistent with previous years, 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	N
Prescription medicines	346
Over the counter medicines	203
Complementary medicines	206
Medical devices	616
Blood and/or tissue products	33
Other	49

What type of products do you manufacture?

Product	N
Prescription medicines	76
Over the counter medicines	60
Complementary medicines	83
Medical devices	229
Blood and/or tissue products	31
Other	55

Sponsors: N=932; Manufacturers: N=422. Multiple selections.

Health professionals most commonly identify themselves in the “Other” category (N=66). A range of roles are identified in the open ended response for this category. These include a diverse range of categories, including those working as Scientists or Researchers (14%), Allied Health professionals (4%) and Pathology professionals (4%) (Table 4).

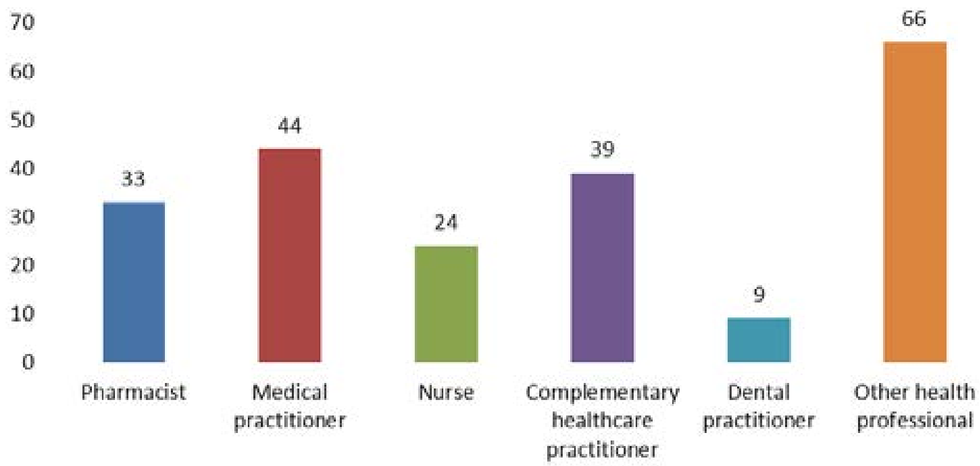
Table 4: Health professionals – main role

Which category best describes your role as a health professional? Please select one answer. - Selected Choice

Category	N	%
Pharmacist	33	15.3
Medical practitioner	44	20.5
Nurse	24	11.2
Complementary healthcare practitioner	39	18.1
Dental practitioner	9	4.2
Other health professional	66	30.7
Health professionals - Main role - Other - Coded		
Medical scientist/Research	29	13.5
Medical provider	4	1.9
Pathology	8	3.7
Quality assurance/Governance	3	1.4
Allied Health pro	8	3.7
Regulation/Reg affairs	3	1.4
Education	1	0.5
Dental	1	0.5
Other	9	4.2

N=215

Figure 5: Health professionals – respondent role (N)



N=215

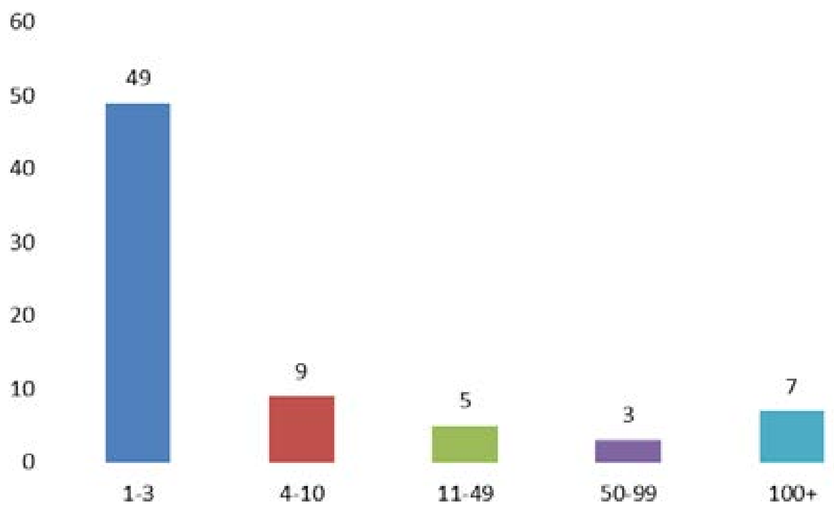
More than two thirds of retailers identified in the survey have a small number of outlets (1-3; 67%). This is slightly lower than in previous years, where more than three in four identified in this category. A further 12% identify 4-10 outlets and just under 10% have 100 or more retail outlets.

Table 5: Retailers – number of outlets

Outlets	N	%
1-3	49	67.1
4-10	9	12.3
11-49	5	6.8
50-99	3	4.1
100+	7	9.6

N=73

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



N=73

Reputation, trust and risk management

There is a strong level of trust that the TGA will perform its role with integrity, with 86% of respondents to this question highlighting agreement and a small number disagreeing with the statement. This outcome is consistent with previous years and shows a strong ongoing level of trust in the TGA as a regulator.

Table 6: 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	N
The TGA gets the balance right between risks and benefits of therapeutic goods*	**15**	4	11	17	51	18	**69**	2,136
I trust the TGA to perform its role ethically and with integrity	**6**	3	3	9	41	44	**86**	2,194

*__Note:__ wording change between 2017 and 2018. Previous wording: "Australia gets the balance right between the risks associated with therapeutic goods and their benefits"

The statement focusing on the TGA getting the balance right between risks and benefits of therapeutic goods shows a lower level of agreement (69%); however, those in agreement considerably outweigh those who disagree (15%). As was the case for the trust focussed question, the outcomes in 2018 are similar to those observed across previous surveys, with the level of agreement in relation to the 'Balance right' question observed at 71% in 2017 and 68% in 2016 (Table 7 and Figure 7).

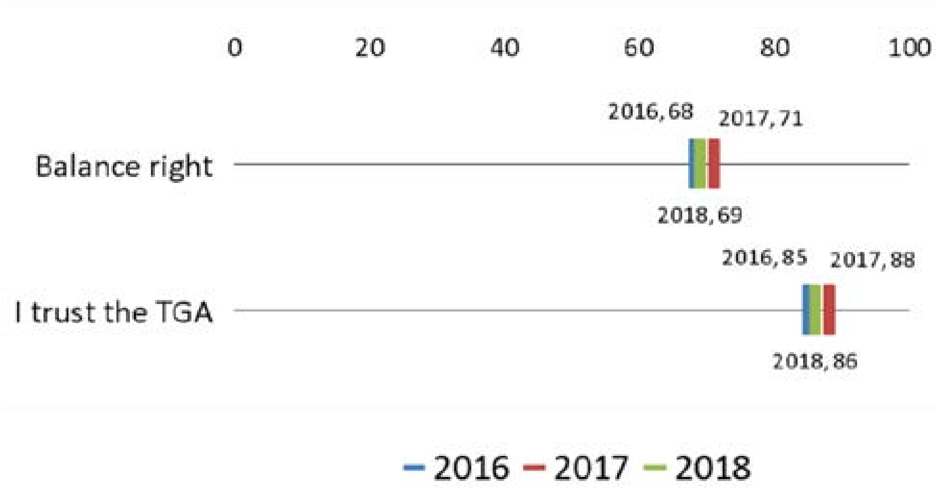
Table 7: Balance and Trust – 2016 - 2018 (%)

Please indicate your level of agreement with the following statements:

Statement	Nett Disagree	Neither	Nett Agree	Nett Disagree	Neither	Nett Agree	Nett Disagree	Neither	Nett Agree
	2018			2017			2016		
Balance right	**15**	17	**69**	**12**	13	**71**	**15**	13	**68**
I trust the TGA	**6**	9	**86**	**5**	6	**88**	**6**	9	**85**

N=2,136-2,519; *__Note:__ Wording change between 2017 and 2018 in relation to 'Balance right' question.

Figure 7: Balance and Trust – 2016 - 2018 Nett Agreement (%)



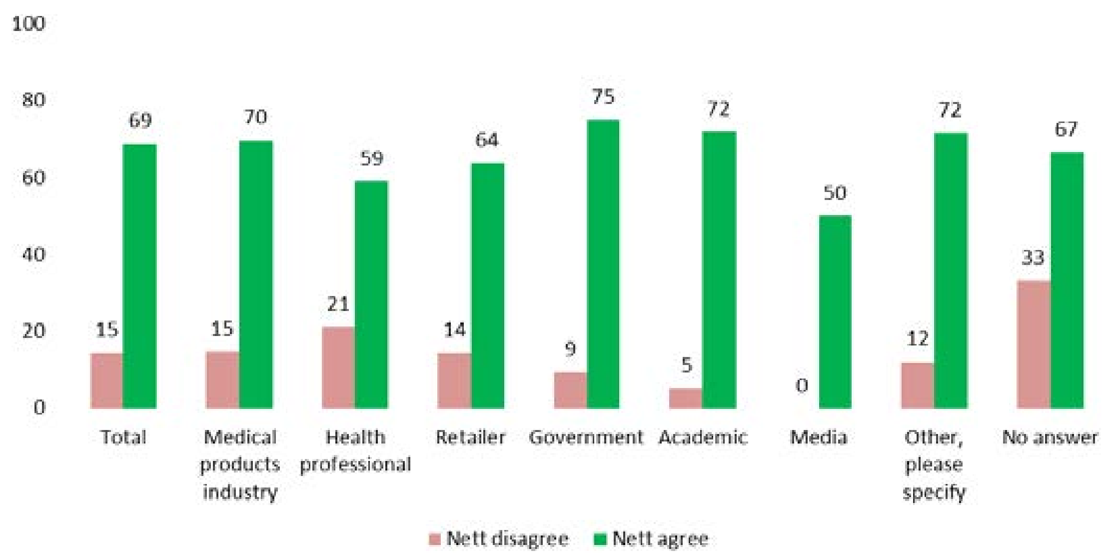
N=2,136-2,519

Across the two measures here, there is a slight tendency for lower levels of agreement by Health professionals and (to a lesser extent) Retailers (Figure 8 and Figure 11). Media stakeholders also show lower levels of agreement; however, the sample size for this group is very small (N=2) and does not allow meaningful analysis to occur.

Getting the balance right

Government (75%), Academic (72%) and Medical Products Industry (70%) participants are most likely to identify agreement in relation to the perceptions that the TGA gets the balance right in its role. In contrast, Retailers (64% Nett agreement) and Health professionals (59%) show generally lower agreement and, in the case of Health professionals, higher levels of disagreement (21%). The outcomes here for both Retailers and Health professionals represent a downward shift from the previous survey where agreement was observed at 75% and 70% respectively.

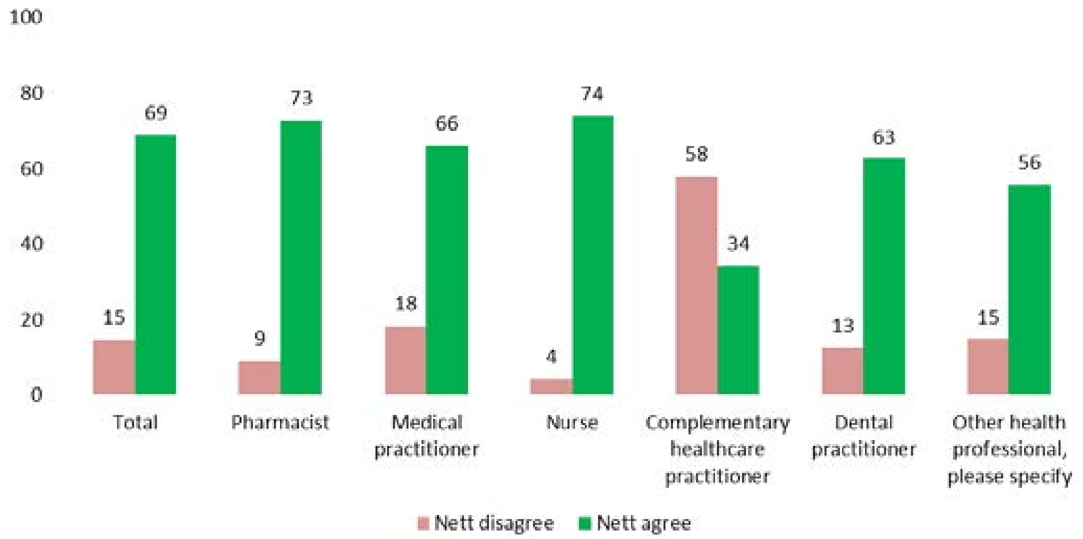
Figure 8: Gets the balance right by stakeholder group (%)



Med prod ind: N=1,457; Health pro: N=208; Retailer: N=69; Gov: N=64; Academic: N=57; Media: N=2; Other: N=273.

In the case of Health professionals, breakdowns across professional categories show large variations across the sub-groups identified within this category (Figure 9). There is generally strong agreement amongst Pharmacists (73%), Nurses (74%) and (to a lesser extent) Medical practitioners (66%). The overall lower level of agreement is driven strongly by Complementary healthcare practitioners (34% Nett agreement and 58% Nett disagreement) and those who identify in the Other category (56% Nett agreement). It is notable that Complementary healthcare practitioners are the only grouping across the survey where disagreement outweighs agreement on this measure.

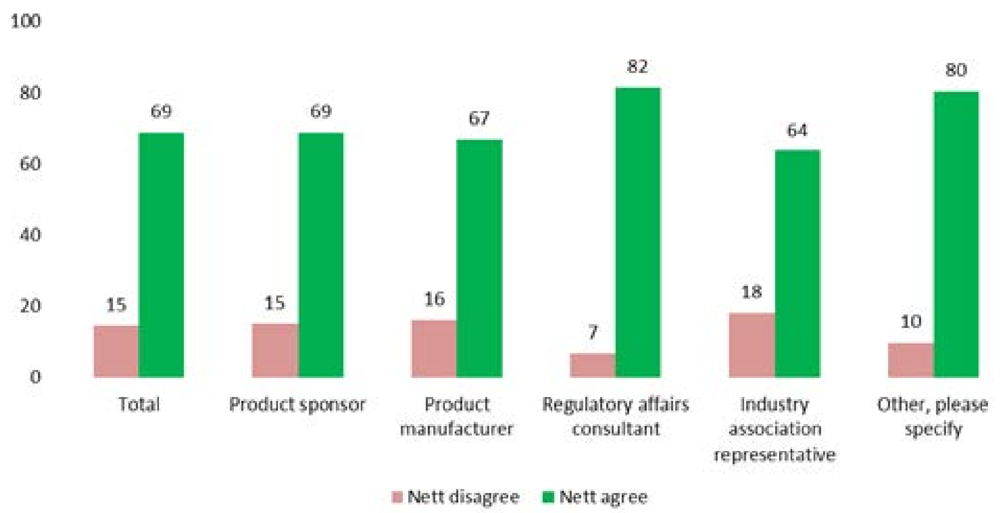
Figure 9: Gets the balance right – Health professionals (%)



Pharmacist: N=33; Med prac: N=44; Nurse: N=23; Comp health: N=38; Dental: N=8; Other: N=61.

Outcomes among Medical products industry participants are generally consistent across the sub-categories in this grouping (Figure 10). The exception here is Regulatory affairs consultants, who show a generally higher tendency to agree (82%) and a lower propensity to disagree (7%). The outcome for Industry association representatives (64% nett agreement and 18% Nett disagreement) shows a shift from 2017, where disagreement (57%) outweighed agreement (29%). Whilst this potentially represents a substantial shift, it is relevant to highlight the small sample size across these measures, with only 11 Industry Association representatives identified in the current years sample (and 14 in 2017).

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



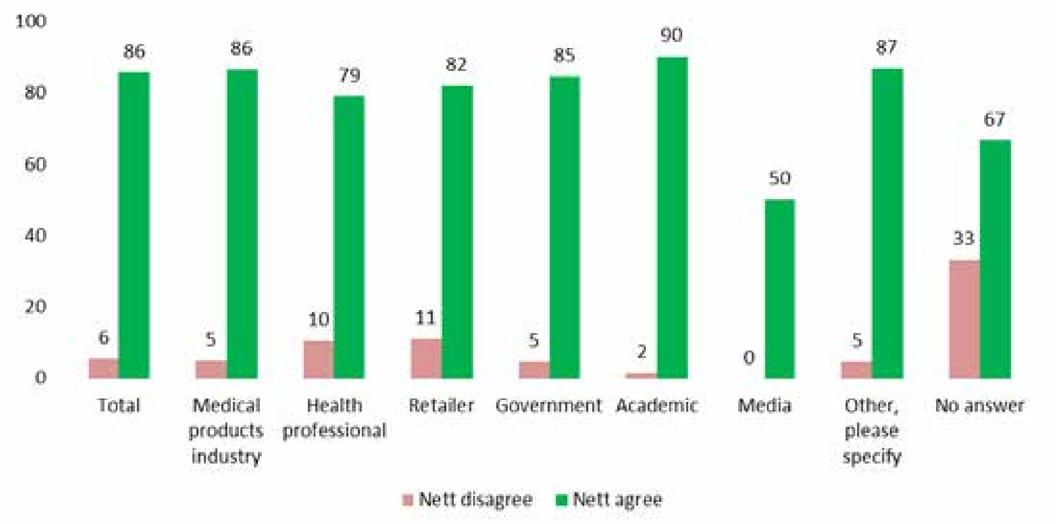
Sponsor: N=892; Manufacturer: N=396; Reg Affairs Con: N=103; Ind Assoc Rep: N=11; Other: N=51.

Trust in the TGA

As was the case in both 2016 and 2017, trust in the TGA is strong for all groupings in the survey, with more than seven in ten respondents across all of the major stakeholder categories highlighting agreement that they trust the TGA to act ethically and with integrity (Figure 11). Agreement on this statement is particularly strong in Medical products industry, Academic, Retailer and Government categories.

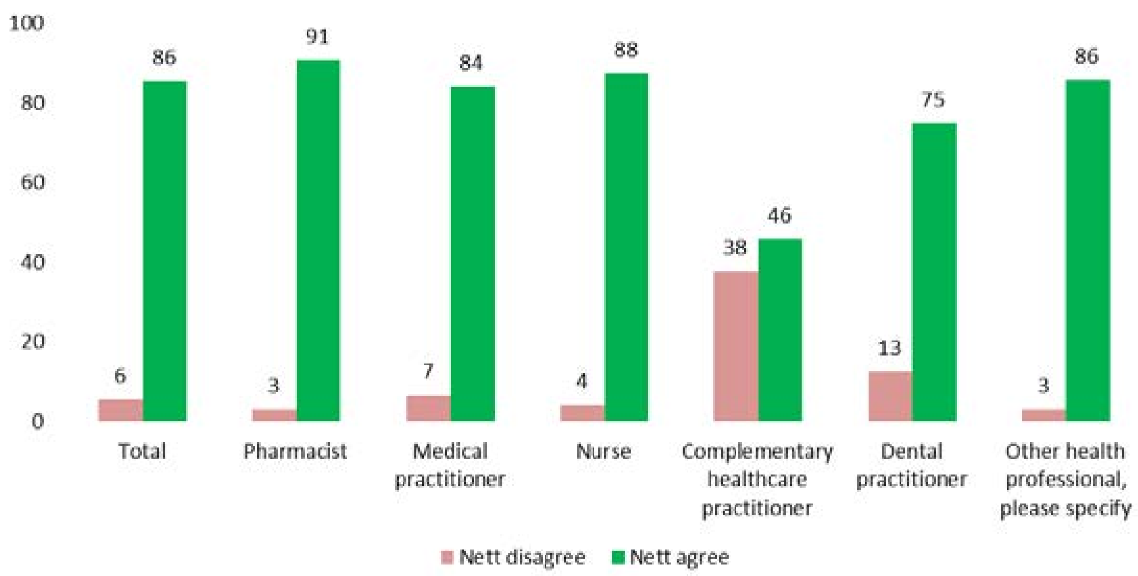
Levels of trust are very high amongst health professionals in the Medical practitioner, Nurse Pharmacist and Other categories. Similarly to the previously identified pattern relating to ‘Balance right’, the overall slightly lower level of agreement for Health professionals in comparison to other broad groupings in the survey is driven by lower agreement by Complementary healthcare practitioners (46% Nett agreement and 38% Nett disagreement). Dental practitioners are also observed at slightly lower agreement levels, although the overall outcome for this group remains strong (Figure 12).

Figure 11: Trust in the TGA by stakeholder group (%)



Med prod ind: N=1,490; Health pro: N=210; Retailer: N=72; Gov: N=65; Academic: N=62; Media: N=2; Other: N=287.

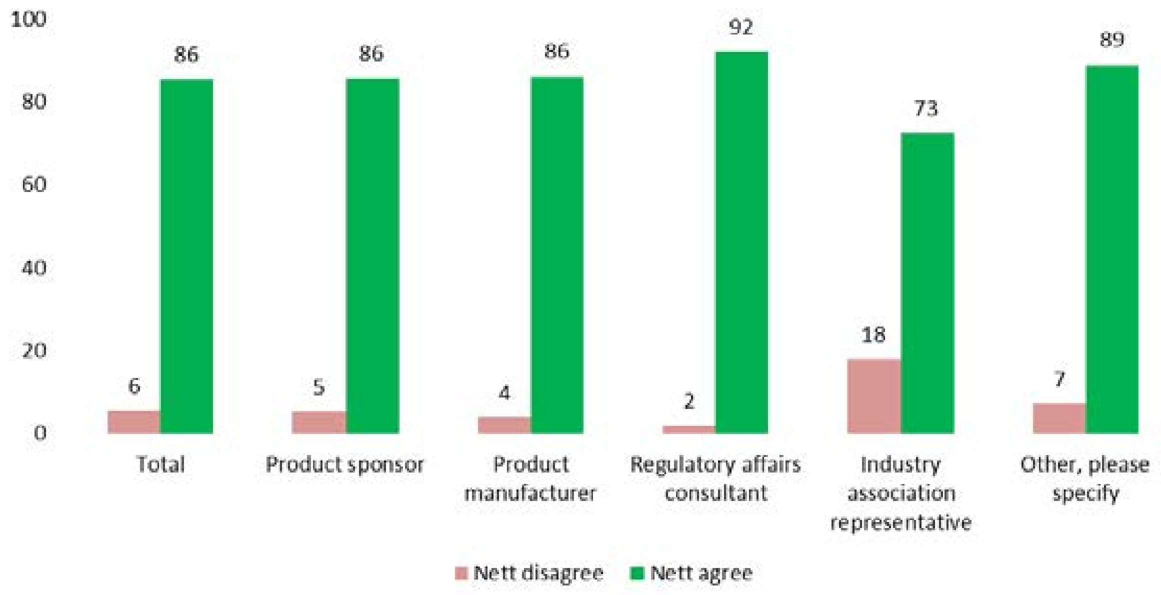
Figure 12: Trust in the TGA - Health professionals (%)



Pharmacist: N=33; Med prac: N=44; Nurse: N=24; Comp health: N=37; Dental: N=8; Other: N=63.

Trust levels are consistently high amongst all categories within the Medical products industry grouping, ranging from a high of 92% Nett agreement by Regulatory affairs consultants to a low of 73% amongst Industry association representatives. This overall pattern is similar to that observed in 2017.

Figure 13: Trust in the TGA – Medical products industry (%)



Sponsor: N=907; Manufacturer: N=409; Reg Affairs Con: N=104; Ind Assoc Rep: N=11; Other: N=55.

Confidence in the TGA

Measures of confidence in the TGA were established across five areas in the 2018 survey (Table 8). The strongest outcome observed is in relation to the trustworthiness of the TGA, with just under 7 in 10 responses highlighting High or Full confidence and a further one in four highlighting Moderate confidence. This measure was the only measure tracked in this question set between 2016 and 2018, with the 2018 result falling slightly lower than both the 2017 (73% High or Full confidence) and 2016 (76%) outcomes.

There is a generally strong level of confidence that the TGA Makes decisions based on scientific evidence (62% Nett high confidence and a further 29% moderately confident). Measures of Transparency (50% Nett high confidence), Accountability (54%) and Clear articulation of decisions (48%) are generally lower, showing both lower levels of Nett high confidence as well as higher levels of Nett low confidence at (16%-17%).

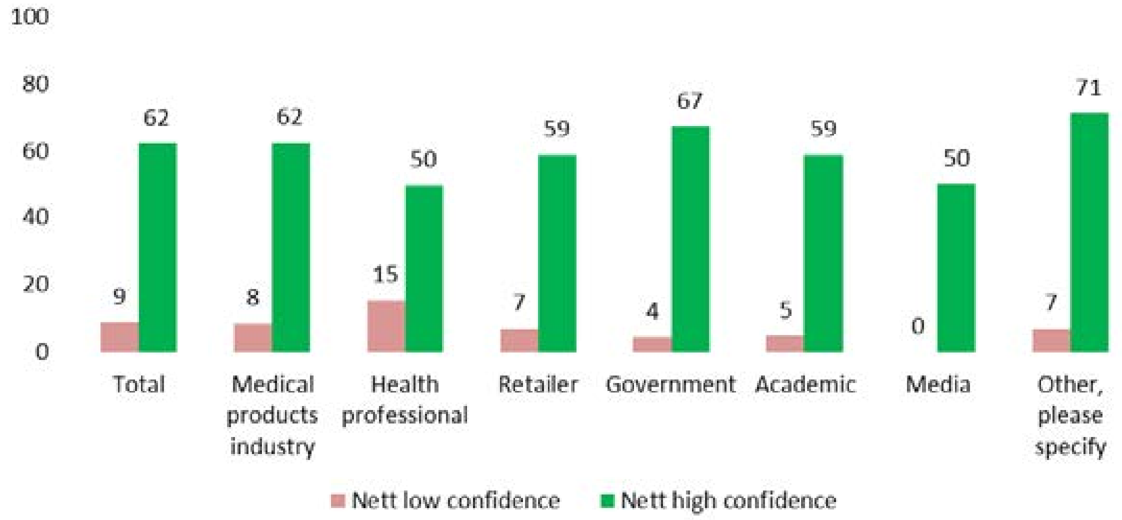
Table 8: Confidence in the TGA (%)

Please indicate how confident you are that the TGA:

Statement	Nett low confidence	Not at all confident	Low confidence	Moderate confidence	High confidence	Full confidence	Nett high confidence	N
Makes decisions based on scientific evidence	8.6	1.7	6.9	29.1	49.8	12.5	62.2	2180
Is transparent	16.6	3.9	12.7	33.3	39.5	10.7	50.2	2177
Is accountable for its decisions	16.0	4.1	11.9	29.9	41.8	12.2	54.1	2168
Clearly articulates reasons for its decisions	16.6	3.9	12.7	35.1	38.4	9.9	48.3	2175
Is trustworthy	6.4	2.1	4.4	24.4	49.7	19.5	69.2	2173

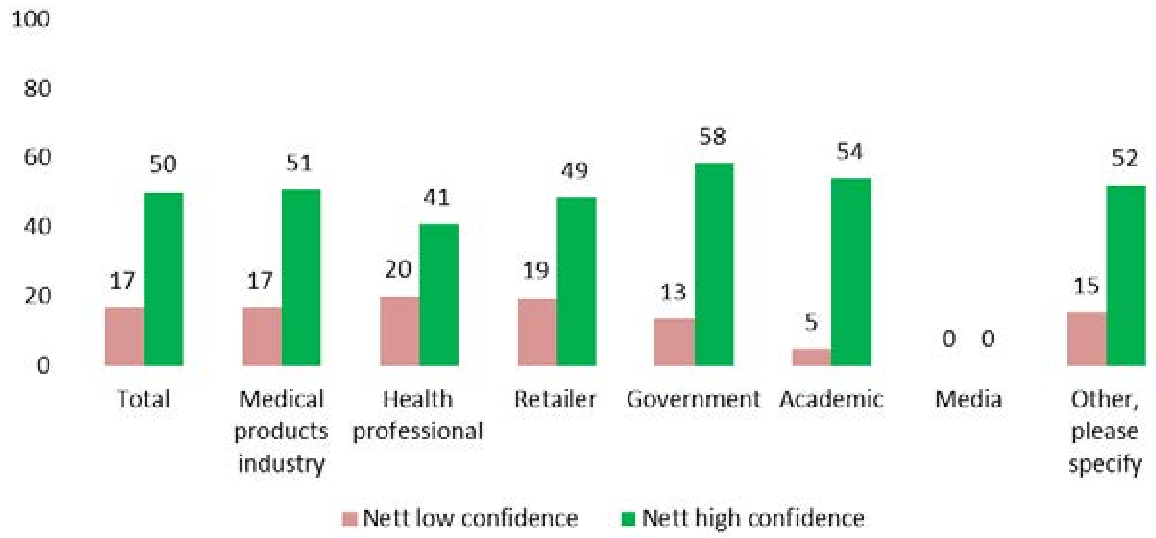
Responses across major stakeholder groupings (shown in Figures 14-18) highlight a general pattern where Health professional and Retailer stakeholders consistently show lower levels of confidence. Government and Medical products industry groups in the survey tend to show overall higher levels of confidence across these measures.

Figure 14: Makes decisions based on scientific evidence – Confidence by Stakeholder category (%)



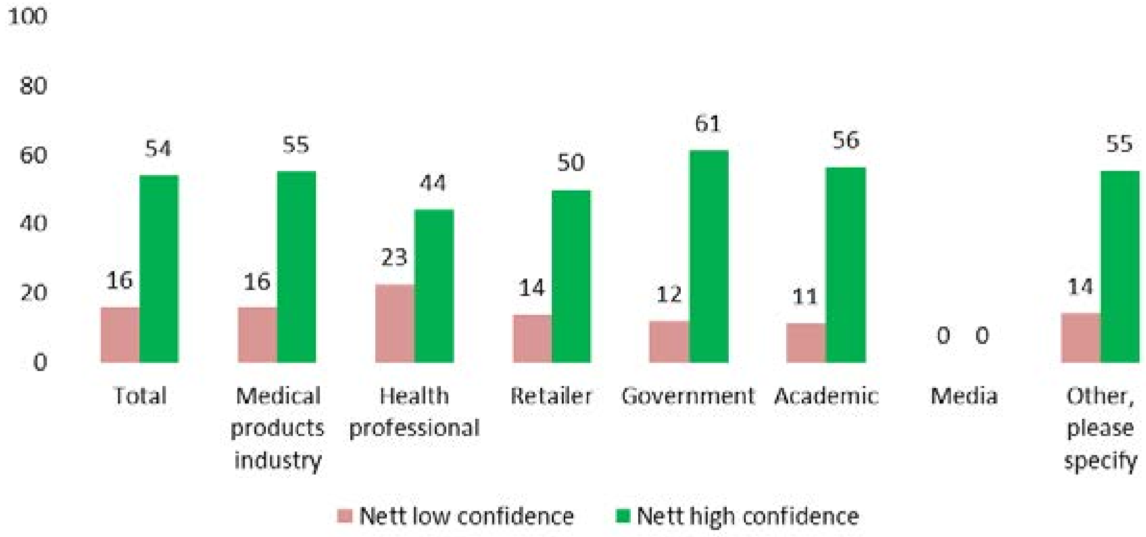
Med prod ind: N=1,473; Health pro: N=208; Retailer: N=73; Gov: N=67; Academic: N=63; Media: N=2; Other: N=288.

Figure 15: Is transparent – Confidence by Stakeholder category (%)



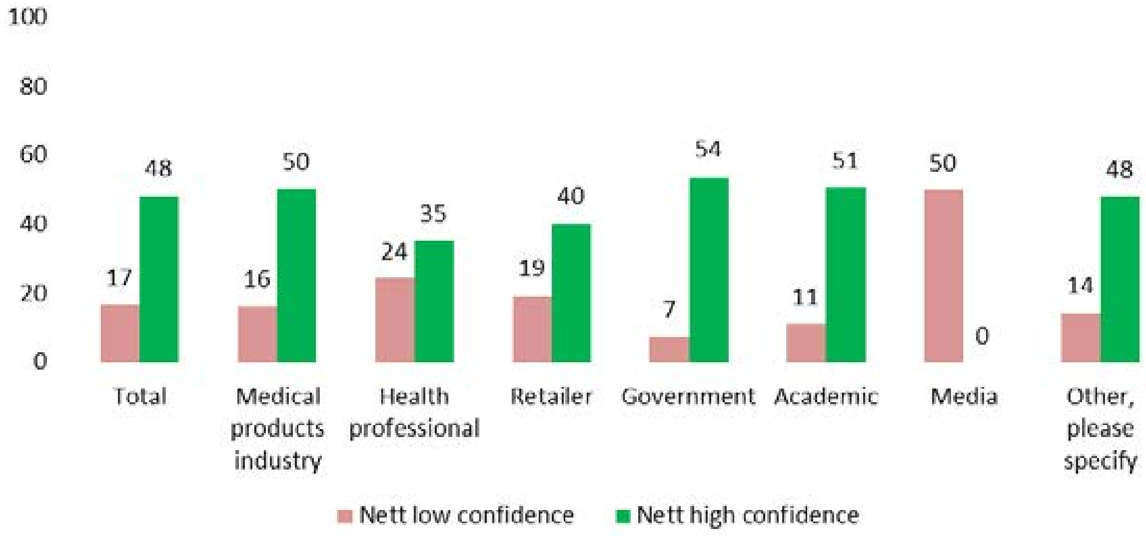
Med prod ind: N=1,471; Health pro: N=209; Retailer: N=72; Gov: N=67; Academic: N=63; Media: N=2; Other: N=287.

Figure 16: Is accountable for its decisions – Confidence by Stakeholder category (%)



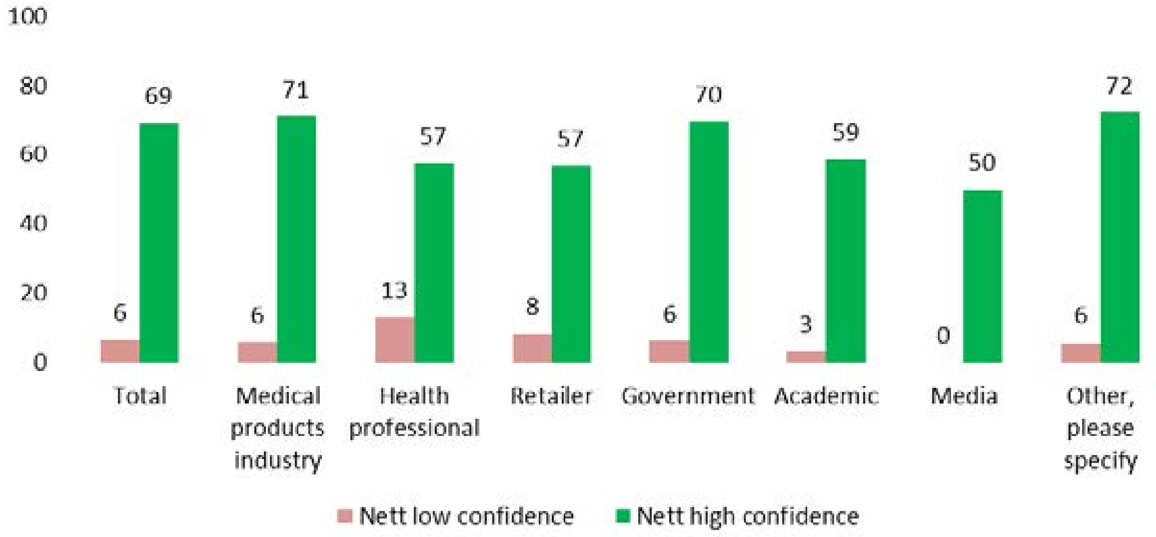
Med prod ind: N=1,464; Health pro: N=208; Retailer: N=72; Gov: N=67; Academic: N=62; Media: N=2; Other: N=287.

Figure 17: Clearly articulates reasons for its decisions – Confidence by Stakeholder category (%)



Med prod ind: N=1,469; Health pro: N=209; Retailer: N=72; Gov: N=67; Academic: N=63; Media: N=2; Other: N=287.

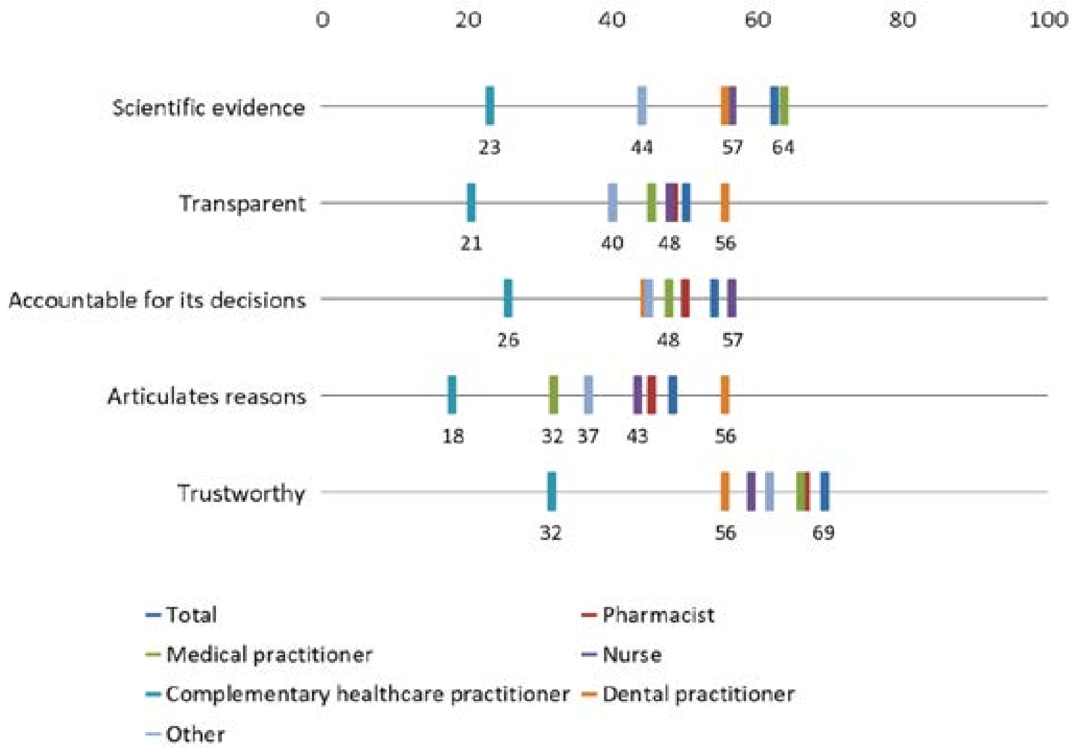
Figure 18: Is trustworthy – Confidence by Stakeholder category (%)



Med prod ind: N=1,470; Health pro: N=207; Retailer: N=72; Gov: N=66; Academic: N=63; Media: N=2; Other: N=287.

The overall lower level of confidence observed within the Health professionals category is generally observed across most sub-groupings within this category (Figure 19). Most notably, Complementary healthcare practitioners show substantially lower levels of confidence across all measures, accounting for a large proportion of the overall observed discrepancies here. Despite this, other groupings including Medical practitioners and Pharmacists tend to show lower than average overall confidence levels.

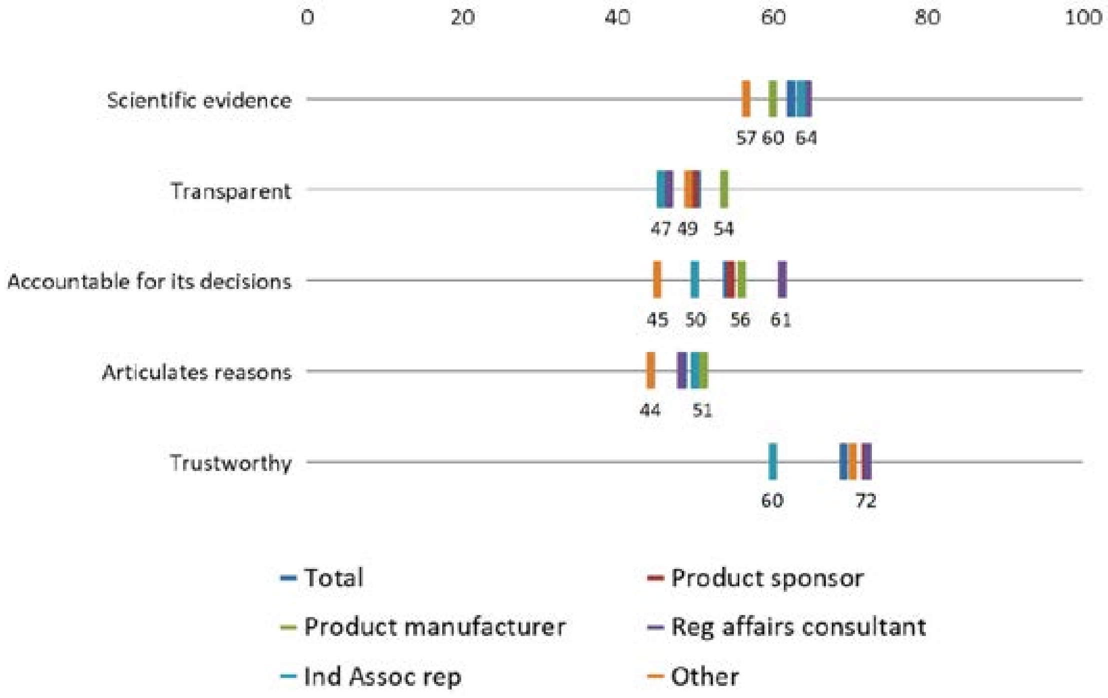
Figure 19: Confidence in the TGA - Health professionals (Nett high confidence %)



Pharmacist: N=32-33; Med prac: N=44; Nurse: N=22-23; Comp health: N=38-39; Dental: N=9; Other: N=59-60.

Within the Medical products industry category there is a generally tight clustering of responses across the range of confidence measures tracked (Figure 20). The most notable outcome here is in relation to the small group of Industry association representatives, who appear less likely to have confidence that the TGA is trustworthy. Those who identify in the Other category also tend to show lower confidence across three of the measures (Scientific evidence, Accountability and Articulation of reasons for decisions). Similarly to other areas in the survey, Regulatory affairs consultants and Product manufacturers show relatively high levels of confidence in the TGA when compared to the overall average.

Figure 20: Confidence in the TGA – Medical products industry (Nett high confidence %)



Sponsor: N=895-898; Manufacturer: N=401-403; Reg Affairs Con: N=103-104; Ind Assoc Rep: N=10-11; Other: N=51-54.

Collaboration, consultation and feedback

Agreement levels across a range of statements related to consultation, collaboration and feedback processes highlight marked variation across the range of focus areas tested. The strongest outcome across this question set is in relation to agreement that I am able to provide feedback to the TGA and that TGA consultation is valuable, where 74% and 73% of respondents respectively Agree or Strongly agree (Table 9). Disagreement on these measures is also generally low. Despite the strong outcome in relation to the ability to provide feedback, this commonly does not appear to translate into a belief that the TGA will listen to the feedback provided, with only 51% Nett agreement on this statement and 16% Nett disagreement. Similarly, a relatively low 55% of respondents highlight that the TGA is collaborative (Nett disagreement 17%).

For the remaining measures, there is 62% Nett agreement that the TGA consults with me on relevant issues and 58% Nett agreement that the TGA provides opportunities to input into key decisions that impact me.

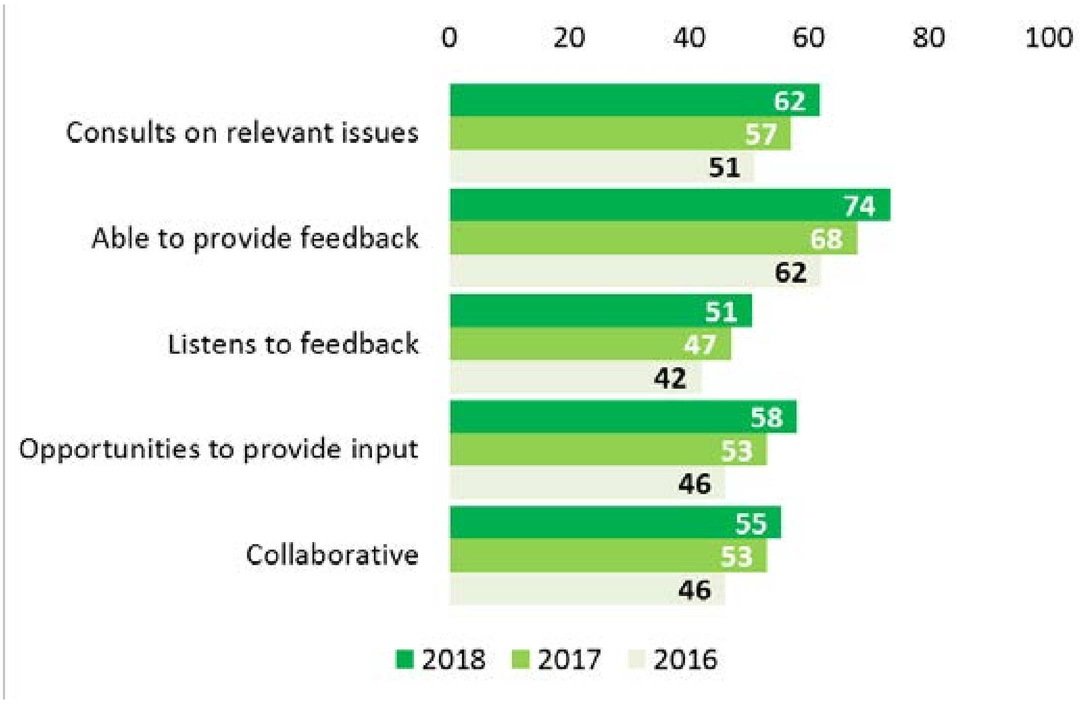
Table 9: Collaboration, consultation and feedback (%)

Please highlight your level of agreement with the following statements:

Statement	Nett disagree	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Nett agree	N
The TGA consults with me on relevant issues	**15.5**	4.3	11.3	22.7	42.8	18.9	**61.8**	1949
I am able to provide feedback to the TGA	**10.0**	2.5	7.5	16.5	51.3	22.3	**73.5**	2007
The TGA listens to feedback	**16.3**	4.7	11.6	33.2	36.0	14.5	**50.5**	1916
TGA consultation is valuable	**7.7**	3.0	4.7	18.9	40.9	32.5	**73.4**	1986
The TGA provides opportunities to provide input into key decisions that impact me	**15.8**	4.8	11.0	26.2	40.3	17.7	**58.0**	1946
The TGA is collaborative	**16.6**	4.8	11.8	27.9	38.8	16.7	**55.4**	1979

While the overall results here show room for improvement, there is evidence of a continued positive trend across these measures when comparing to previous years surveys. As evident in Figure 21, across each of the measures tracked there is a strong and consistent trend between 2016 and 2018 toward higher levels of Nett agreement. The overall trends show rises in Nett agreement of close to or above 10% across each of the measures. This positive trend and the consistency of the trend across this question set demonstrate a substantial and ongoing improvement.

Figure 21: Collaboration, consultation and feedback – 2016 - 2018 (% Nett agreement)

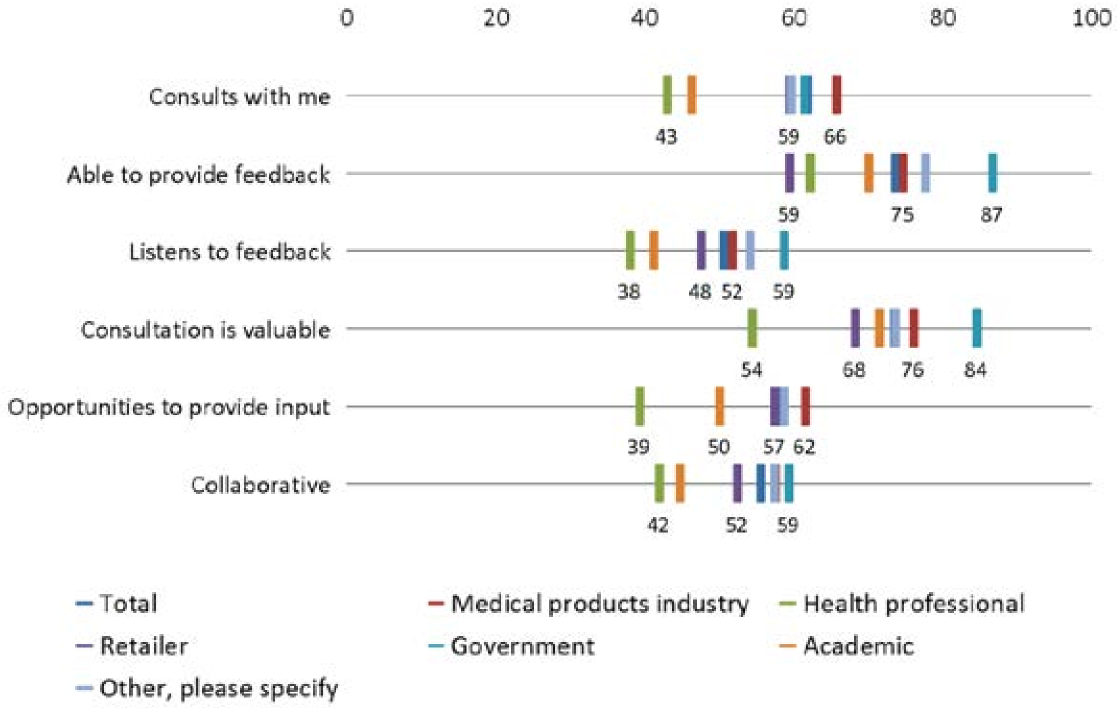


Opportunities to continue to build on the improvements observed are evident in relation to listening to feedback, being proactively collaborative and ensuring transparent and easily accessed opportunities for input are made available.

Within the broad stakeholder categories there is a tendency for higher agreement levels to be observed among Government and Medical products industry stakeholders (Figure 22). In contrast, Health professionals, Academics and (to a lesser extent) Retailers all show trends toward lower Nett agreement on these measures.

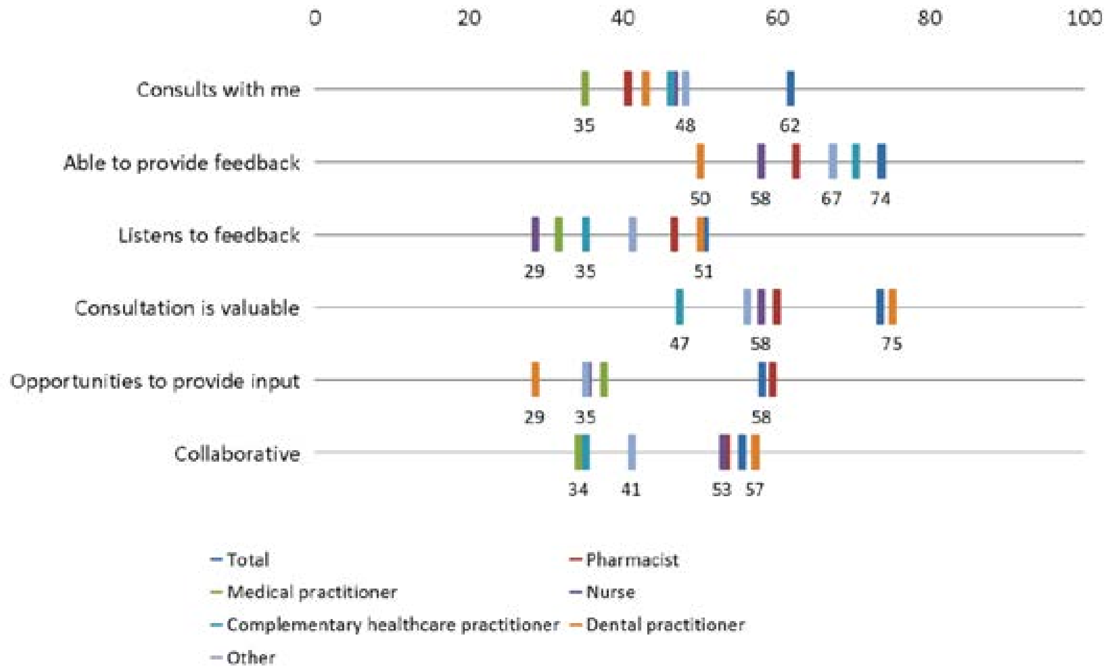
Figures 22-24 show Nett agreement levels across each question amongst the broad stakeholder categories as well as Health professional and Medical products industry sub-groups. In particular, it is notable that there is wide variation in agreement levels across the health professional groupings.

Figure 22: Collaboration, consultation and feedback – Stakeholder category (% Nett agreement)



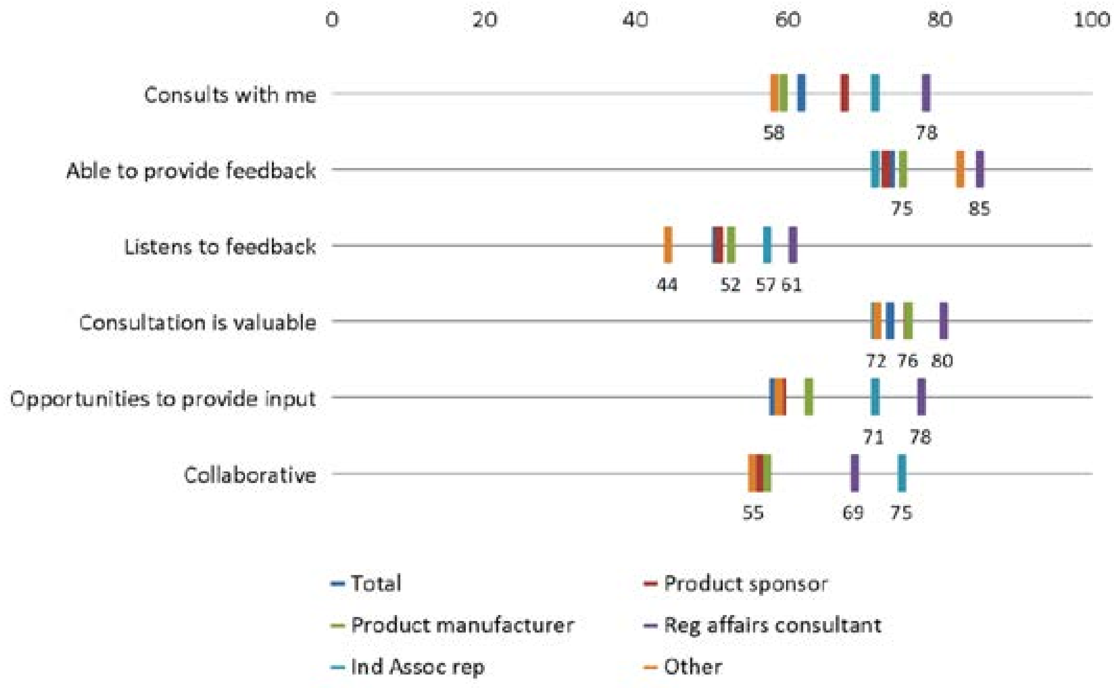
Med prod ind: N=1,313-1,368; Health pro: N=179-193; Retailer: N=61-66; Gov: N=57-60; Academic: N=50-56; Media: N=2; Other: N=246-264.

Figure 23: Collaboration, consultation and feedback –Health professionals (% Nett agreement)



Pharmacist: N=30-32; Med prac: N=38-40; Nurse: N=14-19; Comp health: N=37-39; Dental: N=7-8; Other: N=51-58.

Figure 24: Collaboration, consultation and feedback – Medical products industry (% Nett agreement)



Sponsor: N=824-852; Manufacturer: N=341-365; Reg Affairs Con: N=92-98; Ind Assoc Rep: N=7-8; Other: N=43-47.

Communications, information and contact with the TGA

Communication and information services – Use

For the range of potential contact methods presented, the TGA website represents the most common channel in all stakeholder groups (Table 10). Less than 2% of respondents to the question highlight that they Never use the TGA website, with just under one in five saying they use the site 'All the time'. Similarly, the business services website is also a commonly used channel, with more than 9 in 10 responses highlighting some use.

Other common information channels include Email subscription services (79% any use; 31% use All of the time or Often), the Consultation forecast (54% any use) and TGA roadshows, information sessions and conference booths (58% any use). The RSS feed and Twitter services are less commonly used, however 35% (RSS) and 20% (Twitter) highlight some use of each service.

Table 10: Information service – Frequency of use (%)

Please indicate how much you use the following TGA services:

Service	Never	Rarely	Sometimes	Often	All the time	Any use	N
TGA website	1.7	12.6	31.3	34.6	19.9	98	2110
TGA eBusiness services portal	8.6	14.7	29.6	27.8	19.3	91	2099
Email subscription information services	21.5	24.2	23.1	19.0	12.2	79	2098
TGA Consultation Forecast	46.4	26.7	17.1	7.5	2.3	54	2091
TGA RSS feed	65.2	22.7	8.9	2.3	0.9	35	2091
TGA Twitter	80.3	14.3	3.9	1.3	0.3	20	2089
TGA roadshows, info sessions or conf booths	42.5	23.5	23.3	8.5	2.2	58	2097

The majority of respondents in each stakeholder group use the TGA website Sometimes, Often or All the time (Table 11). Medical products industry and Government groups are the most frequent users, with around one in five of each of these groups using the site 'All the time'. Health professionals and Retailers, while showing high overall usage levels of the site, report less frequent use with a strong tendency to access Sometimes or Rarely.

Table 11: TGA Website – Frequency of use by stakeholder category (%)

Please indicate how much you use the following TGA services: TGA website (www.tga.gov.au)

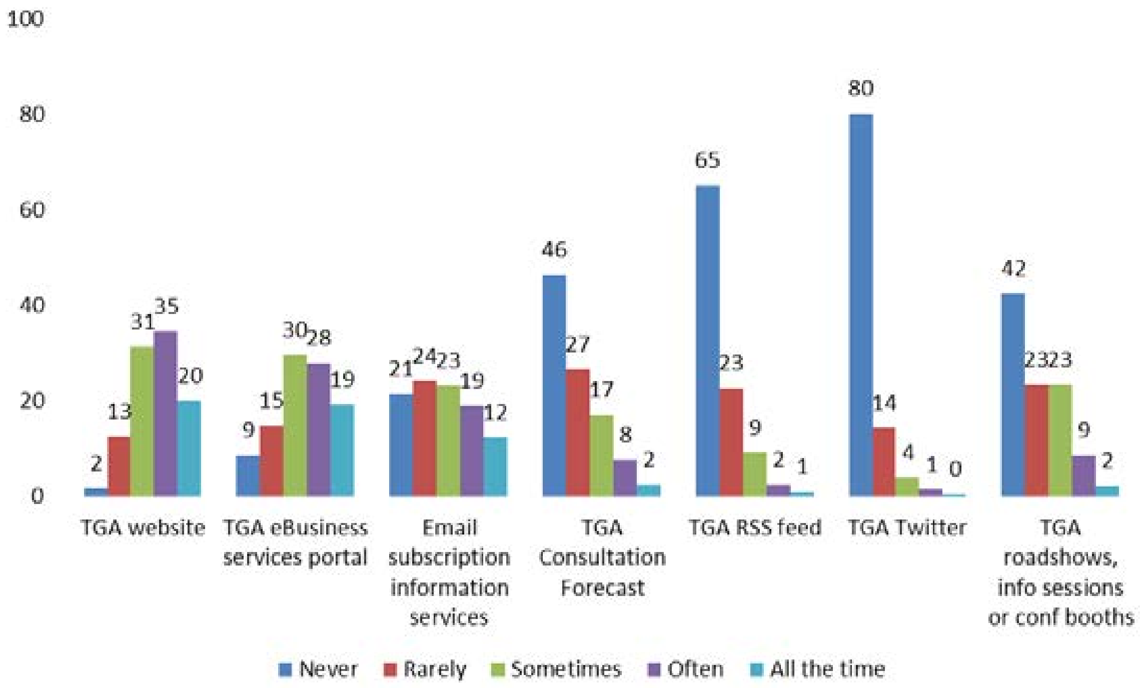
Stakeholder group	Never	Rarely	Sometimes	Often	All the time	Any use	N
Total	1.7	12.6	31.3	34.6	19.9	98	2110
Medical products industry	1.1	10.2	27.5	38.3	22.9	99	1437
Health professional	5.9	23.8	38.6	22.8	8.9	94	202
Retailer	1.6	28.1	39.1	23.4	7.8	98	64
Government	0.0	11.5	29.5	39.3	19.7	100	61
Academic	3.2	9.5	49.2	31.7	6.3	97	63
Media	0.0	0.0	50.0	0.0	50.0	100	2
Other, please specify	1.5	14.2	40.7	25.8	17.8	99	275
No answer	0.0	16.7	16.7	50.0	16.7	100	6

The eBusiness services portal is accessed by just over nine in ten participants. As expected, use is highest for Medical products industry stakeholders (95%) and generally lowest amongst Health professional (73%), Academic (82%) and Government (89%) stakeholders (Table 13).

Around eight in ten participants in the survey use email subscription services. Use of these services is common for the Medical products industry (82%), with Health professionals, Retailers and Academics all showing similar usage levels (at around 70%).

Retailers report the highest use of both the RSS feed (46%) and Twitter (26%). Similarly, this group reports the highest level of overall engagement with the Consultation forecast (60%), with both Medical products industry (56%) and Health professionals (48%) also showing strong engagement with this channel.

Figure 25: Information service – Frequency of use (%)



N=2,089-2,110

The levels of any use of the identified communication areas show a continued trend toward higher uptake amongst stakeholders since 2016. This trend is consistent across all areas, with notable increases since 2016 in relation to Email subscriptions, Consultation forecast, RSS feed and Twitter (Table 12).

Table 12: TGA information service – Frequency of use – 2016 - 2018 (%)

Please indicate how much you use the following TGA services:

	Used resource		
Service	**2018**	**2017**	**2016**
TGA website	98	96	97
TGA eBusiness services portal	91	88	86
Email subscription info services	79	68	64
TGA Consultation Forecast	54	40	36
TGA RSS feed	35	24	22
TGA Twitter	20	11	9
TGA roadshows		29	30
TGA information sessions	58	48	47
TGA conference booth		25	24

Note: Changes to the question response frame between 2017 and 2018 make comparisons unreliable. Frame moved from specific use levels (e.g. weekly) to 'Never-All the time'.

Table 13: Service use by Stakeholder category (% any use)

Please indicate how much you use the following TGA services:

Service	Med prod's ind	Health pro	Retailer	Govt.	Academic	Media	Other
TGA website	99	94	98	100	97	100	99
TGA eBusiness services portal	95	73	94	89	82	100	89
Email subscription information services	82	68	70	60	70	100	75
Consultation Forecast	56	48	60	39	40	100	50
RSS feed	36	31	46	23	25	100	32
Twitter	19	20	26	21	21	100	21
Roadshows/info sess/conf booths	62	45	46	47	44	100	52

Med prod ind: 1423-1437; Health pro: 198-202; Retailer: 61-64; Gov: 60-61; Academic: 62-63; Media: 1-2; Other: 271-275.

Amongst health professionals there is some variation in the usage patterns. In general, Complementary healthcare practitioners show the highest levels of engagement across a broad range of communication sources, including high engagement with the Website, eBS, email, Consultation forecast and RSS feed (Table 14). Engagement is generally lower amongst Nurses and Medical practitioners for both the eBS and email channels.

Medical products industry participants show universally high engagement with the Website, eBS and email subscription service. Strong growth across this sector has also been observed in relation to use of the Consultation forecast, RSS feed and Twitter channels.

Table 14: Service use – Health professionals (% any use)

Please indicate how much you use the following TGA services:

Service	Pharmacist	Medical practitioner	Nurse	Comp healthcare prac	Dental practitioner	Other
TGA website	97	93	86	97	89	95
TGA eBusiness services portal	71	49	62	87	89	83
Email subscription	68	54	45	84	89	73
Consultation Forecast	35	50	35	74	56	41
RSS feed	27	27	25	50	33	25
Twitter	29	20	25	24	11	12
Roadshows/info sess/conf booths	52	44	40	63	33	36

Pharmacist: N=30-31; Med prac: N=40-41; Nurse: N=20-21; Comp health: N=38; Dental: N=9; Other: N=59-61.

Table 15: Service use – Medical products industry (% any use)

Please indicate how much you use the following TGA services:

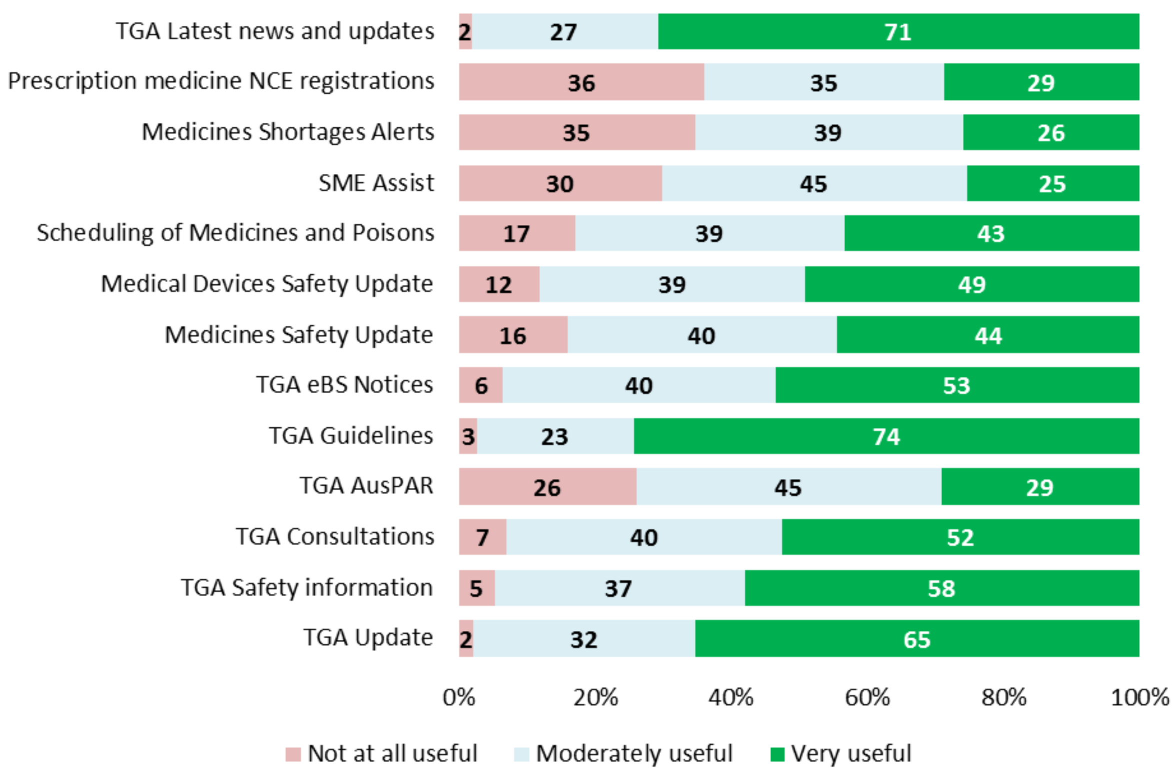
Service	Product sponsor	Product manufacturer	Reg affairs consultant	Ind assoc'n rep	Other
TGA website	99	98	100	100	98
TGA eBusiness services portal	96	90	99	89	96
Email subscription	84	74	93	100	78
Consultation Forecast	54	58	49	74	67
RSS feed	38	33	38	67	25
Twitter	20	20	17	19	22
Roadshows/info sess/conf booths	63	55	76	56	57

Sponsor: 881-884; Manufacturer: 379-387; Reg Affairs Con: 100-101; Ind Assoc Rep: 9; Other: 48-52.

Usefulness of information

There is large variation in the perceived usefulness of the range of TGA service offerings for stakeholders (Figure 26). Most commonly, TGA guidelines (74% Very useful) and Latest news and updates (71%) are the most likely information services to be viewed as Very useful . TGA update (65%), TGA safety information (58%) and TGA eBS notices (53%) are also generally viewed as Very useful by users of these services, with very few highlighting that they are not useful. These results are generally consistent with those observed in previous years of the survey. SME assist, Medicines shortages alerts and Prescription medicine NCE registrations also continue to show lower levels of usefulness for users, with relatively high numbers of participants highlighting that these are not at all useful. These outcomes reflect the targeted focus of these service areas.

Figure 26: Usefulness of information services (%)



N=701-1,947 **Note:** previous year included *Not applicable* measure

Tables 16-18 show variation in usefulness across major stakeholder categories. Overall, Medical products industry participants tend to view the range of information services positively, with this group commonly rating TGA update, Consultations, Guidelines eBS notices and Latest news and updates as Very useful more often than most other groupings in the survey.

Health professionals, Retailers and (to a lesser extent) Government stakeholders also show a strong tendency to find a broad range of information services useful. In the case of Health professionals, a high level of usefulness and a particularly low level of Not at all useful responses are observed in relation to Latest news and updates, TGA guidelines, TGA safety information and TGA updates. Government stakeholders and retailers show strong interest in the Guidelines as well as Safety information and the Latest news and updates.

Table 16: Usefulness of information services by stakeholder category (%)

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

Information service	Rating	Med products ind	Health pro	Retailer	Gov	Academic	Media	Other
TGA Update	Not at all useful	2.4	2.4	2.3	0.0	2.6	0.0	0.5
	Moderately useful	29.2	44.8	48.8	53.1	48.7	50.0	33.2
	Very useful	**68.3**	**52.8**	48.8	46.9	48.7	**50.0**	**66.3**
TGA Safety information	Not at all useful	5.5	2.4	7.3	2.9	9.8	0.0	3.9
	Moderately useful	36.2	42.7	36.6	41.2	41.5	100.0	34.3
	Very useful	**58.3**	**54.8**	**56.1**	**55.9**	48.8	0.0	61.9
TGA Consultations	Not at all useful	7.2	9.7	7.5	0.0	8.3	0.0	4.7
	Moderately useful	37.6	53.1	45.0	58.6	66.7	50.0	40.9
	Very useful	55.1	37.2	47.5	41.4	25.0	**50.0**	**54.4**
TGA AusPAR	Not at all useful	23.4	37.4	32.5	16.0	44.8	0.0	28.8
	Moderately useful	45.8	40.0	50.0	68.0	34.5	100.0	40.4
	Very useful	30.7	22.6	17.5	16.0	20.7	0.0	30.8
TGA Guidelines	Not at all useful	2.2	4.0	10.2	3.8	5.3	0.0	1.2
	Moderately useful	19.3	41.5	32.2	35.8	31.6	50.0	22.9
	Very useful	**78.4**	**54.5**	**57.6**	**60.4**	**63.2**	**50.0**	**75.9**
TGA eBS Notices	Not at all useful	5.5	13.3	13.2	0.0	18.9	0.0	6.3
	Moderately useful	37.3	50.0	50.0	66.7	56.8	100.0	40.0
	Very useful	**57.2**	36.7	36.8	33.3	24.3	0.0	**53.7**
Medicines Safety Update	Not at all useful	17.0	11.9	21.6	7.1	14.7	0.0	12.9
	Moderately useful	39.7	37.3	29.7	64.3	50.0	100.0	37.9
	Very useful	43.3	**50.8**	48.6	28.6	35.3	0.0	49.3

Information service	Rating	Med products ind	Health pro	Retailer	Gov	Academic	Media	Other
Medical Devices Safety Update	Not at all useful	11.4	10.8	13.2	6.9	22.9	0.0	14.0
	Moderately useful	38.2	36.9	36.8	48.3	42.9	100.0	42.7
	Very useful	**50.4**	**52.3**	**50.0**	44.8	34.3	0.0	43.4
Scheduling of Medicines and Poisons	Not at all useful	18.2	15.5	17.8	13.2	19.1	0.0	13.2
	Moderately useful	39.6	34.2	44.4	42.1	36.2	100.0	42.1
	Very useful	42.2	**50.3**	37.8	44.7	44.7	0.0	44.7
SME Assist	Not at all useful	28.5	40.6	35.6	29.2	30.0	0.0	27.7
	Moderately useful	46.2	37.6	44.4	50.0	40.0	100.0	42.6
	Very useful	25.3	21.8	20.0	20.8	30.0	0.0	29.7
Medicines Shortages Alerts	Not at all useful	34.6	27.1	50.0	18.2	37.9	0.0	40.0
	Moderately useful	40.5	35.4	31.3	63.6	37.9	0.0	35.7
	Very useful	24.8	37.5	18.8	18.2	24.1	**100.0**	24.3
Prescription medicine NCE registrations	Not at all useful	33.4	37.9	55.6	34.8	40.0	0.0	44.3
	Moderately useful	34.8	38.8	30.6	47.8	43.3	100.0	32.1
	Very useful	31.7	23.3	13.9	17.4	16.7	0.0	23.7
TGA Latest news and updates	Not at all useful	1.6	1.7	6.9	0.0	0.0	0.0	2.4
	Moderately useful	24.8	39.7	37.9	42.9	56.3	50.0	22.9
	Very useful	**73.5**	**58.6**	**55.2**	**57.1**	43.8	**50.0**	**74.7**

Very useful 70% or more   Very useful 60%-69.9%   Very useful 50%-59.9%

Med prod ind: N=495-1345; Health pro: N=58-176; Retailer: N=29-59; Gov: N=14-53; Academic: N=16-57; Media: N=1-2; Other: N=83-249.

Within the Health professionals grouping (Table 17) interest and use of the various information products varies markedly across service areas. Consistent with 2017, Pharmacists are most positively engaged with a broad range of information channels and resources. Dental practitioners show strong engagement with Updates, Consultations and Scheduling of medicines and poisons information. Somewhat similar to Pharmacists, Nurses show strong interest in targeted information such as TGA guidelines, Medicines safety updates and Medical devices safety updates.

Medical practitioners show relatively strong interest in Medicines shortages alerts and Scheduling of medicines and poisons information and report generally moderate levels of usefulness across the range of information sources available.

Complementary healthcare practitioners, while generally less engaged with the range of information services presented, highlighted moderate levels of usefulness in relation to Safety information, Updates and Latest news and updates services.

Among Medical products industry participants, Regulatory affairs consultants report strong levels of usefulness across a broad range of information services (Table 18). This includes relatively high levels of use for Updates, Safety information, Consultations, Guidelines eBS notices, Scheduling of medicines and poisons, Prescription medicines NCE registrations and Latest news and updates.

Product sponsors and product manufacturers show similar patterns in relation to the ratings of usefulness of various information services. This includes strong usefulness ratings for Updates, Safety information, TGA guidelines, eBS notices and Latest news and updates.

Table 17: Usefulness of information services – Health professionals (%)

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

Information service	Rating	Pharmacist	Medical practitioner	Nurse	Comp healthcare prac	Dental practitioner	Other
TGA Update	Not at all useful	0.0	4.8	11.1	0.0	14.3	0.0
	Moderately useful	47.4	52.4	44.4	45.2	14.3	45.9
	Very useful	**52.6**	42.9	44.4	**54.8**	**71.4**	**54.1**
TGA Safety information	Not at all useful	0.0	10.0	0.0	0.0	14.3	0.0
	Moderately useful	42.1	45.0	44.4	45.2	28.6	43.2
	Very useful	**57.9**	45.0	**55.6**	**54.8**	**57.1**	**56.8**
TGA Consultations	Not at all useful	0.0	5.3	0.0	16.1	16.7	11.4
	Moderately useful	62.5	63.2	83.3	45.2	0.0	54.3
	Very useful	37.5	31.6	16.7	38.7	**83.3**	34.3
TGA AusPAR	Not at all useful	22.2	37.5	42.9	40.7	20.0	45.5
	Moderately useful	38.9	41.7	42.9	40.7	40.0	39.4
	Very useful	38.9	20.8	14.3	18.5	40.0	15.2
TGA Guidelines	Not at all useful	4.2	0.0	0.0	8.1	14.3	3.8
	Moderately useful	29.2	52.6	35.3	45.9	28.6	39.6
	Very useful	**66.7**	47.4	**64.7**	45.9	**57.1**	**56.6**

Information service	Rating	Pharmacist	Medical practitioner	Nurse	Comp healthcare prac	Dental practitioner	Other
TGA eBS Notices	Not at all useful	7.7	17.6	0.0	11.5	16.7	16.7
	Moderately useful	30.8	58.8	83.3	42.3	33.3	56.7
	Very useful	**61.5**	23.5	16.7	46.2	**50.0**	26.7
Medicines Safety Update	Not at all useful	0.0	9.1	0.0	9.7	14.3	26.7
	Moderately useful	33.3	50.0	33.3	48.4	28.6	23.3
	Very useful	**66.7**	40.9	**66.7**	41.9	**57.1**	**50.0**
Medical Devices Safety Update	Not at all useful	0.0	10.5	0.0	18.5	14.3	11.8
	Moderately useful	26.7	42.1	37.5	44.4	28.6	32.4
	Very useful	**73.3**	47.4	**62.5**	37.0	**57.1**	**55.9**
Scheduling of Medicines and Poisons	Not at all useful	0.0	8.8	6.3	11.4	14.3	44.1
	Moderately useful	32.1	35.3	43.8	40.0	14.3	29.4
	Very useful	**67.9**	**55.9**	**50.0**	48.6	**71.4**	26.5
SME Assist	Not at all useful	18.8	40.0	28.6	38.5	20.0	63.0
	Moderately useful	37.5	40.0	57.1	38.5	40.0	29.6
	Very useful	43.8	20.0	14.3	23.1	40.0	7.4
Medicines Shortages Alerts	Not at all useful	15.8	10.0	16.7	40.9	0.0	47.8
	Moderately useful	36.8	40.0	50.0	36.4	60.0	21.7
	Very useful	47.4	**50.0**	33.3	22.7	40.0	30.4
Prescription medicine NCE registrations	Not at all useful	5.3	32.1	37.5	50.0	0.0	63.3
	Moderately useful	57.9	39.3	37.5	33.3	50.0	26.7
	Very useful	36.8	28.6	25.0	16.7	**50.0**	10.0
TGA Latest news and updates	Not at all useful	0.0	0.0	0.0	5.3	0.0	0.0
	Moderately useful	14.3	60.0	80.0	36.8	66.7	21.4
	Very useful	**85.7**	40.0	20.0	**57.9**	33.3	**78.6**

Very useful 70% or more   Very useful 60%-69.9%   Very useful 50%-59.9%

Table 18: Usefulness of information services – Medical products industry (%)

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

Information service	Rating	Product sponsor	Product manufacturer	Reg Affairs Consult	Ind Assoc	Other
TGA Update	Not at all useful	3.0	2.3	0.0	0.0	0.0
	Moderately useful	28.9	35.8	20.2	0.0	14.3
	Very useful	**68.1**	**61.9**	**79.8**	**100.0**	**85.7**
TGA Safety information	Not at all useful	5.5	6.7	3.4	0.0	2.9
	Moderately useful	37.5	35.7	38.2	25.0	14.3
	Very useful	**57.0**	**57.5**	**58.4**	**75.0**	**82.9**
TGA Consultations	Not at all useful	7.2	9.2	3.4	0.0	5.9
	Moderately useful	37.8	38.7	29.5	28.6	44.1
	Very useful	**55.0**	**52.1**	**67.0**	**71.4**	**50.0**
TGA AusPAR	Not at all useful	22.3	30.9	10.8	0.0	36.0
	Moderately useful	45.5	47.6	43.2	40.0	44.0
	Very useful	32.2	21.5	45.9	**60.0**	20.0
TGA Guidelines	Not at all useful	2.9	1.4	0.0	0.0	2.2
	Moderately useful	19.4	21.5	12.1	11.1	20.0
	Very useful	**77.8**	**77.1**	**87.9**	**88.9**	**77.8**
TGA eBS Notices	Not at all useful	5.4	7.4	1.1	0.0	3.2
	Moderately useful	35.0	41.6	39.6	28.6	51.6
	Very useful	**59.6**	**51.0**	**59.3**	**71.4**	45.2
Medicines Safety Update	Not at all useful	18.3	16.8	8.8	0.0	21.4
	Moderately useful	37.9	42.7	52.5	16.7	28.6
	Very useful	43.8	40.5	38.8	**83.3**	**50.0**
Medical Devices Safety Update	Not at all useful	11.8	10.1	10.5	0.0	16.7
	Moderately useful	38.7	38.3	42.1	28.6	25.0
	Very useful	49.4	**51.5**	47.4	**71.4**	**58.3**
Scheduling of Medicines and Poisons	Not at all useful	19.7	19.7	7.2	0.0	12.5
	Moderately useful	40.7	37.4	38.6	0.0	46.9
	Very useful	39.6	42.9	54.2	**100.0**	40.6
SME Assist	Not at all useful	27.6	29.7	36.2	0.0	25.0
	Moderately useful	48.7	44.1	36.2	60.0	39.3
	Very useful	23.7	26.2	27.5	40.0	35.7
Medicines Shortages Alerts	Not at all useful	33.4	41.6	30.3	0.0	36.4
	Moderately useful	41.5	38.3	43.9	75.0	18.2
	Very useful	25.1	20.1	25.8	25.0	45.5

Information service	Rating	Product sponsor	Product manufacturer	Reg Affairs Consult	Ind Assoc	Other
Prescription medicine NCE registrations	Not at all useful	32.3	44.6	15.5	0.0	38.5
	Moderately useful	34.1	35.1	40.8	25.0	34.6
	Very useful	33.5	20.2	43.7	**75.0**	26.9
TGA Latest news and updates	Not at all useful	1.9	1.7	0.0	0.0	0.0
	Moderately useful	26.2	27.4	10.5	0.0	25.0
	Very useful	**72.0**	**70.9**	**89.5**	**100.0**	**75.0**

Very useful 70% or more Very useful 60%-69.9% Very useful 50%-59.9%

Sponsor: 321-836; Manufacturer: 117-353; Reg Affairs Con: 38-99; Ind Assoc Rep: 4-9; Other: 12-45.

Frequency of contact

Just over four in ten participants highlight being in contact with the TGA About once a year (42%; Table 19). The lower level of response in this category compared to 2017 is likely a reflection of a wording change across surveys, with a shift in the current year toward more responses in the About once a month category (29% in 2018 vs 15% in 2017). Just over one in ten (12%) participants are in contact with the TGA on a regular basis (About once a week 7% or More than once a week 5%).

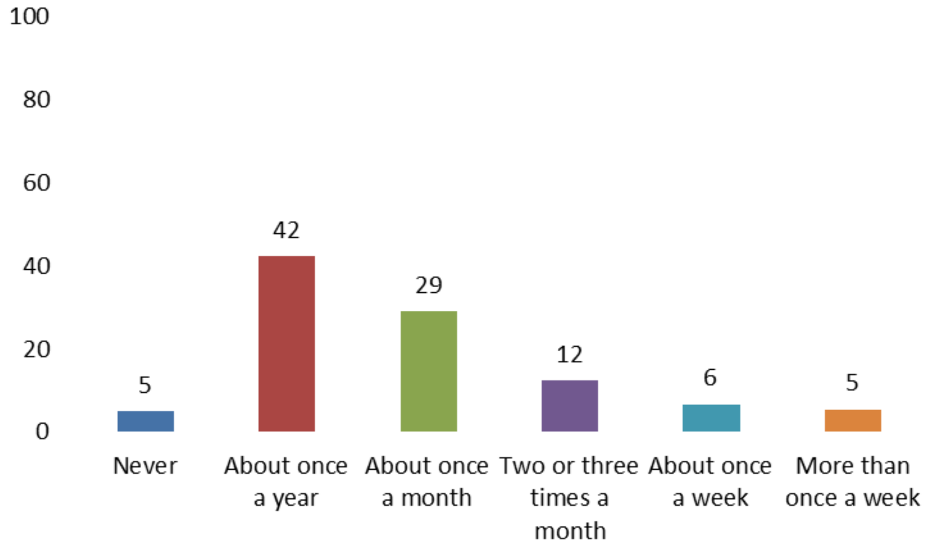
Table 19: Frequency of contact with the TGA (%)

How often do you have contact with the TGA?

Year	Never	About once a year*	About once a month	Two or three times a month	About once a week	More than once a week	Not sure*	N
2018	5	42	29	12	7	5	-	2082
2017	4	48	15	13	6	10	4	2269
2016	5	51	17	12	6	9	-	2429

Note: Scale change for 2018 questionnaire: (a) “Less than once a month” changed to “About once a year” and (b) Not sure option excluded.

Figure 27: Frequency of contact with TGA (%)



N=2,082

Medical products industry (68% in contact Monthly or more often) and Government (66%) stakeholders show higher frequency of contact than other broad groups in the survey (Table 20 and Figure 28). Health professionals (34%), Retailers (33%) and Academics (40%) all show regular (monthly or more often) contact at relatively low levels compared to other groups. In particular, very few of these stakleholders are in contact About once a week or More than once a week. The overall pattern here is similar to the pattern in 2017 (Figure 29). It is notable that there is a marked increase in the proportion of stakeholders in all categories who report being in contact monthly or more often. This may be attributable to the adjusted scale employed for this question.

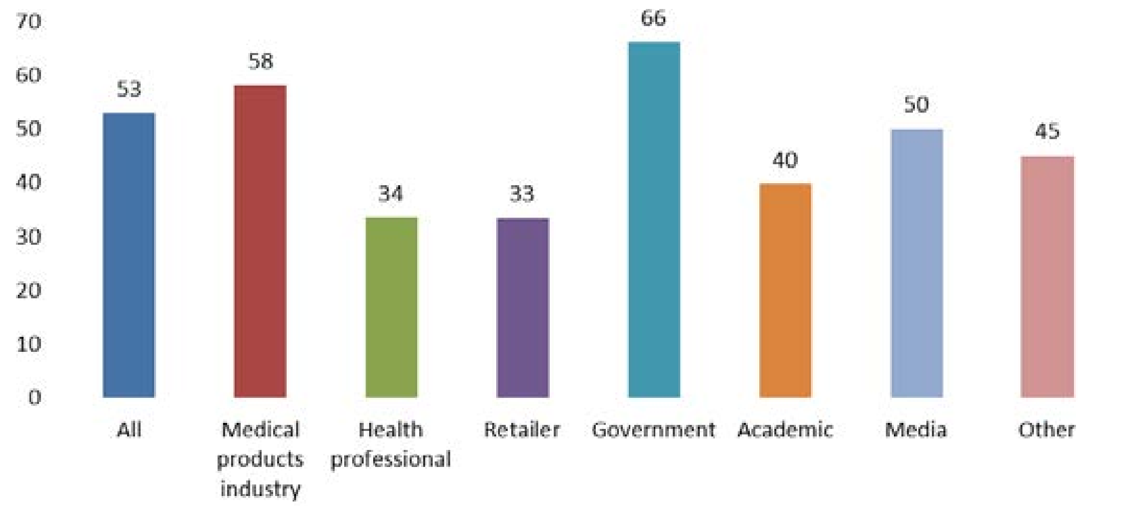
Within the Medical products industry, frequency of contact is highest for Regulatory affairs consultants (79% Monthly or more often) Product sponsors (63%) and Industry association representatives (67%; Figure 30). Product manufacturers are less frequently in contact (41%). This pattern is similar to that observed in 2017, however the proportion of those in contact monthly or more often has increased across all groups.

Table 20: Frequency of contact by stakeholder category (%)

How often do you have contact with the TGA?

Stakeholder group	Never	About once a year	About once a month	Two or three times a month	About once a week	More than once a week	N
Total	4.9	42.2	28.9	12.2	6.5	5.3	2082
Medical products industry	3.5	38.4	30.4	14.3	7.9	5.4	1423
Health professional	12.7	53.8	22.8	5.6	4.1	1.0	197
Retailer	6.3	60.3	23.8	9.5	0.0	0.0	63
Government	5.1	28.8	18.6	1.7	6.8	39.0	59
Academic	4.8	55.6	31.7	6.3	1.6	0.0	63
Media	0.0	50.0	0.0	50.0	0.0	0.0	2
Other	5.9	49.1	27.9	10.4	3.3	3.3	269

Figure 28: Frequency of contact – Monthly or more often - with TGA by Stakeholder category (%)



Med prod ind: 1423; Health pro: 197; Retailer: 63; Gov: 59; Academic: 63; Media: 2; Other: 269.

Figure 29: Frequency of contact – Monthly or more often - by Stakeholder category 2017-2018 (%)

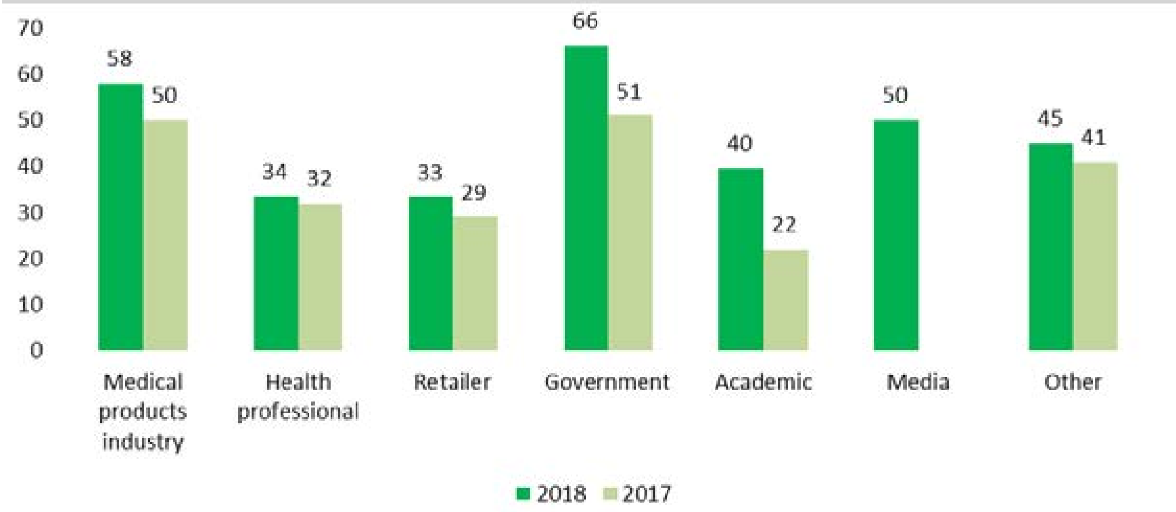
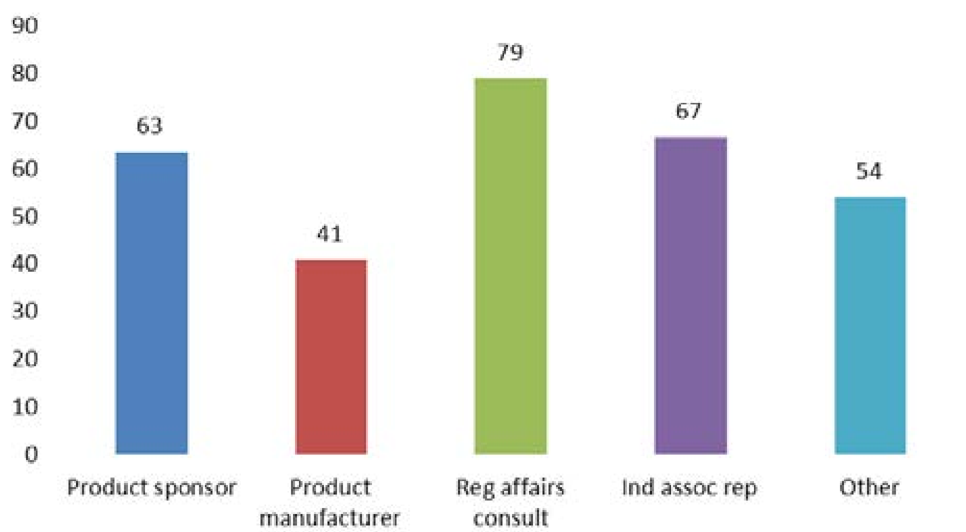


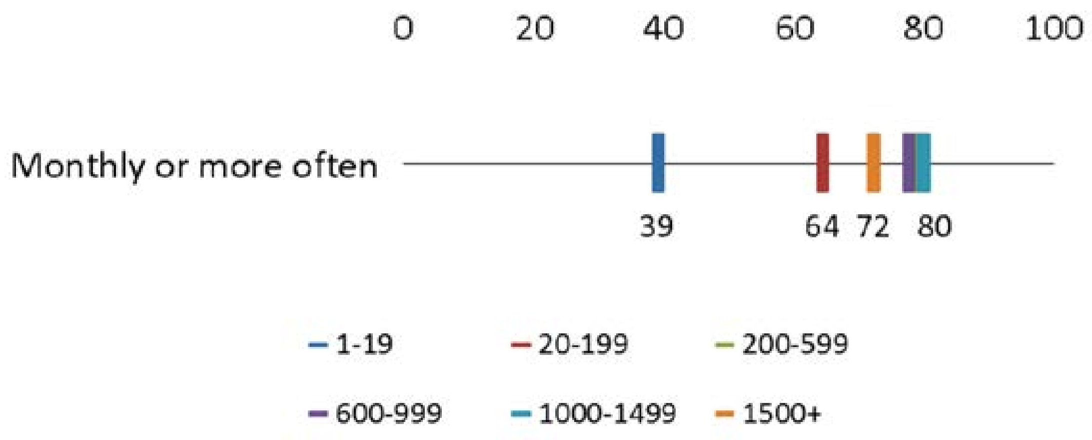
Figure 30: Frequency of contact – Monthly or more often - with TGA – Medical products industry (%)



Sponsor: N=878.Manufacturer: N=382; Reg Affairs Con: N=100; Ind Assoc Rep: N=9; Other: N=50.

Within the medical products industry, contact frequency is generally higher for larger organisations with a higher number of employees (Figure 31). Less than 4 in ten of those with 1-19 employees are in contact monthly or more, often rising to three in four or more amongst large employers with 600 employees or more.

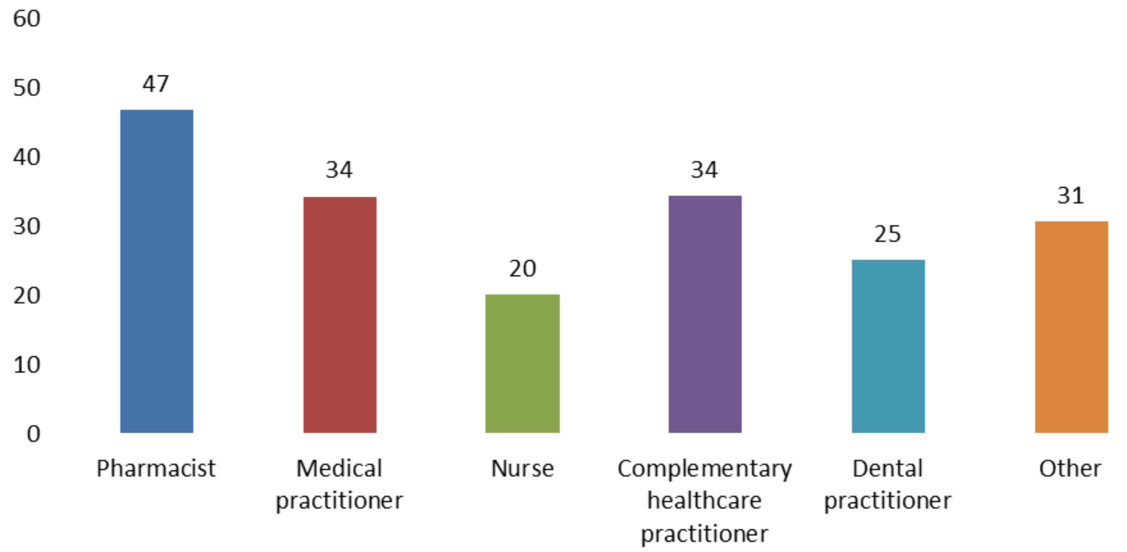
Figure 31: Frequency of contact – Monthly or more often – Medical products industry – employee numbers (%)



1-19: N=554; 20-199: N=399; 200-599: N=211; 600-999: N=49; 1000-1499: N=25; 1500+: N=18.

Within the Health professionals category, contact levels are highest amongst Pharmacists (47% monthly or more often), Medical practitioners (34%) and Complementary healthcare professionals (34%; Figure 32).

Figure 32: Frequency of contact – Monthly or more often - with TGA – Health professionals (%)



Pharmacist: N=30; Med prac: N=41; Nurse: N=20; Comp health: N=38; Dental: N=8; Other: N=59.

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 21 and Figure 33). Medical products industry stakeholders are most likely to nominate these application focussed contact reasons.

Understanding a regulatory process, information about manufacturing products or about specific products, responses to consultation activities and issues related to importing and exporting are all commonly identified reasons for contact.

Table 21: Reasons for contact

For which of the following reasons do you contact the TGA?

Reason	N
Lodge an application with the TGA	1350
Check on the progress of an application with the TGA	1079
Information about manufacturing products	591
Report, or enquire about, a problem with a medical device or medicine	420
Information on product recall(s)	324
Importing/exporting products	496
Information on specific product(s)	587
In response to TGA consultation activities	570
Feedback on TGA service delivery	201
To understand the regulatory process	1013
Other, please specify	189

*Note: 101 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.

Figure 33: Reasons for contact (N)

Most stakeholders nominate a number of categories when highlighting the reasons for contacting the TGA, with the most common number of selections falling at 3 and the average at 3.5 selections (Table 22).

Table 22: Reasons for contact – number of reasons (N)

Number of selections	N
1	359
2	342
3	370
4	359
5	222
6	147
7	76
8	44
9	17
10	18
11	2
Total	**1956**
Average selections	**3.5**

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:

- Accounts, Fees and Payments.
- ACE scheme.
- Adverse event reporting.
- Advertising/Advertising compliance.
- Application.
- Audit and audit issues.
- Clinical trials.
- Complaints - including seeking information to respond to a complaints and lodging complaints.
- Compliance updates and notifications.
- Disclosures.
- Employment.
- Ethics/Ethics committee.
- External evaluations.
- General advice/communication.
- Inspections - responses and reviews.
- IT issues including general website, forms submissions and other EBS Queries and assistance.
- Licensing and inspections.
- Meeting reporting requirements.
- Pharmacovigilance.
- Product registrations.
- Product scheduling.
- Regulatory safety and efficacy requirements.
- Research.
- Response to TGA communications.
- Tender processes.

Contact channels

The most common contact channel is email, followed by phone (Table 23 and Figure 34). Website contact is also a common channel. Together these three channels represent 96% of the total number of selected contact methods, highlighting their overall importance as key communication and contact points. Overall, respondents selected an average of two contact methods, most commonly involving a combination of email, phone and web channels (Table 24). The pattern is consistent with that observed in 2016 and 2017. It is notable that the trend observed in 2017 for the website to represent a rising proportion of total contact method selections has continued in 2018. The website now accounts for 20% of overall selections, up from 16% in 2016 and continuing the rise from 2017, where it represented 18% of selections. This pattern of contact methods is similar across all groups and sub-groups in the survey.

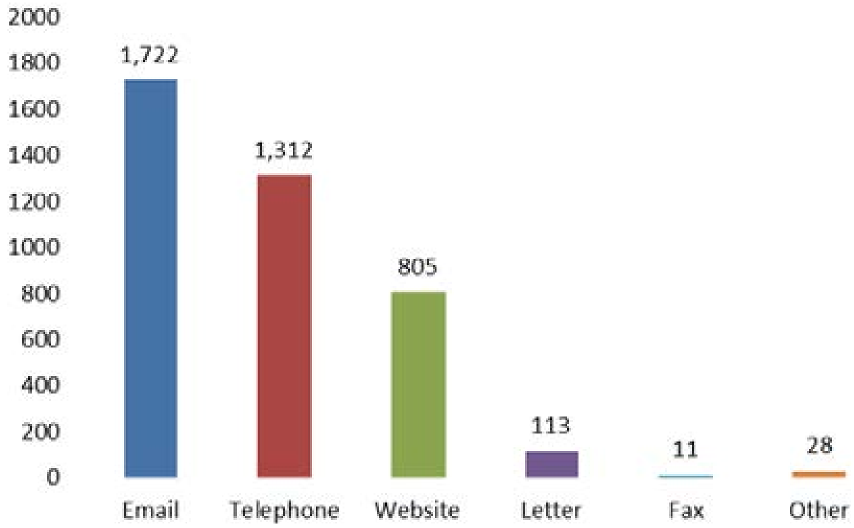
As noted in previous surveys, Letter and Fax contact methods are still utilised by a small proportion of people and will continue to need some monitoring and resourcing. These methods continue to be most commonly used by those in the Medical products industry and Health professionals. As noted in 2017, 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 almost halving again in 2018 (0.3%) and the proportion of Letter selections falling from 6% in 2016 to 4.5% in 2017 and then to 2.8% in 2018. In the case of fax contacts, only 11 people nominated this method, down from 22 in 2017.

Table 23: Contact channels (N)

How do you contact the TGA?

Method	N
Telephone	1312
Email	1722
Letter	113
Fax	11
Website	805
Other	28
N	1949

Figure 34: Contact channel (N)



N=1949

Other contact methods identified in free text responses are:

- Through the eBS or online portal.
- Face to face.
- Via a sponsor, consultant or other intermediary.
- Other online – e.g. skype.

Table 24: Number of channels (N)

Number of selections	N
1	495
2	936
3	453
4	60
5	5
6	0
Total	1949
Average	**2.0**

Response times

Participants were asked to highlight how long it took to receive a response from the TGA in relation to various contact methods (Table 25 and Figure 35). In line with the direct format it represents, phone enquiries continue to provide the most immediate response times, with one in four responses provided immediately and more than eight in ten provided in 2 days or less. This outcome is consistent with the experience of phone contact in previous years of the survey (2018 82% 2 days or less; 2017 83%; 2016 83%; Table 26 and Figure 36).

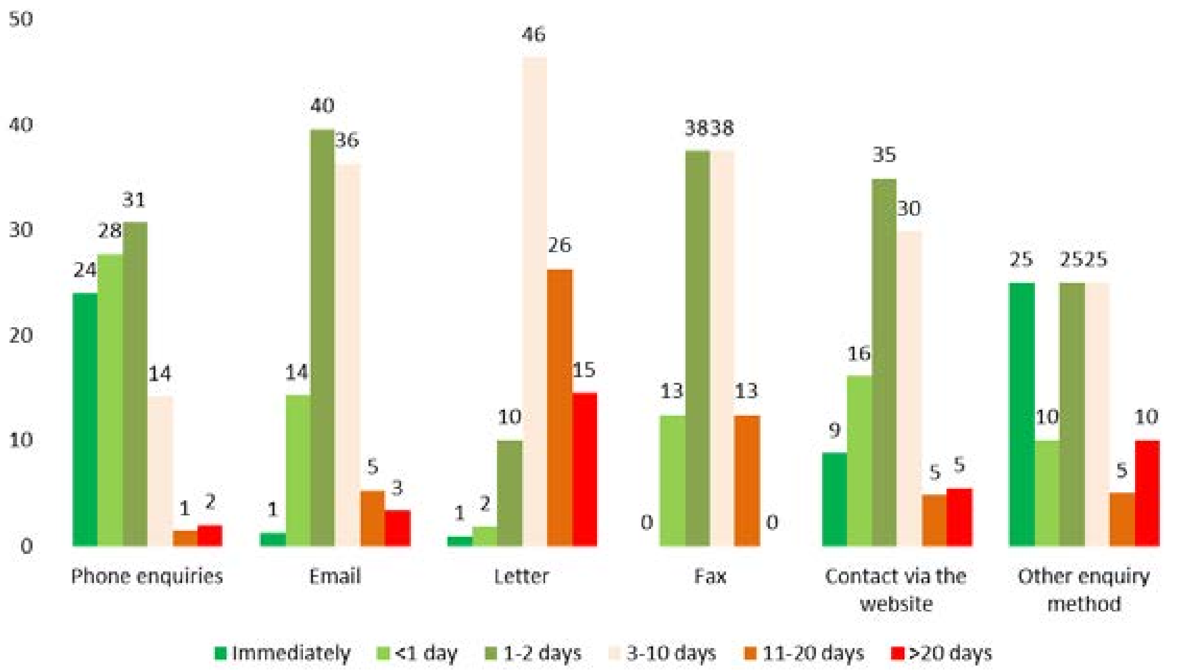
Contact via the TGA website highlights generally fast response times of less than 2 days for 60% of those in contact via this method. Email contact shows generally strong response times with more than half resolved within 2 days and over 90% within 10 days. Despite the generally strong results here, both website and email contacts present ongoing opportunities to minimise the number of responses in the 3-10 day response time category, which still account for around 3 in 10 responses across these common contact methods. This will increase the likelihood of satisfaction with communications experience and also minimise the propensity for contact via phone.

Table 25: Response times by contact category (%)

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

Contact method	Immediately	<1 day	1-2 days	3-10 days	11-20 days	>20 days	N
Phone enquiries	24.0	27.7	30.7	14.2	1.4	2.0	1272
Email	1.3	14.3	39.5	36.3	5.3	3.3	1667
Letter	0.9	1.8	10.0	46.4	26.4	14.5	110
Fax	0.0	12.5	37.5	37.5	12.5	0.0	8
Contact via the website	8.8	16.1	34.9	29.9	4.8	5.5	750
Other enquiry method	25.0	10.0	25.0	25.0	5.0	10.0	20

Figure 35: Response times by contact category (%)



N=8-1,667

Overall trends across the three years of the survey highlight generally consistent performance across the main contact channels (Figure 36 and Table 26). The only identifiable trends are in relation to low traffic channels (letter and fax), where the proportion of 2 day or less response times has increased. In both of these cases the numbers involved are small and diminishing over time, highlighting the increasingly small impact these changes will have on overall perceptions and experiences.

Figure 36: Response times (2 days or less) by contact category – 2016-2018 (%)

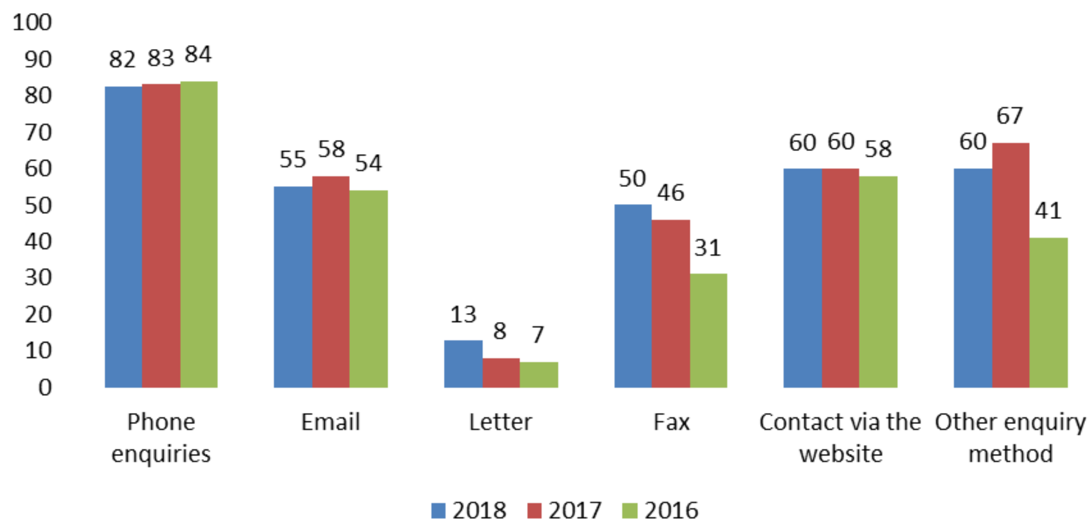


Table 26: Response times 2016-2018 (%)

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

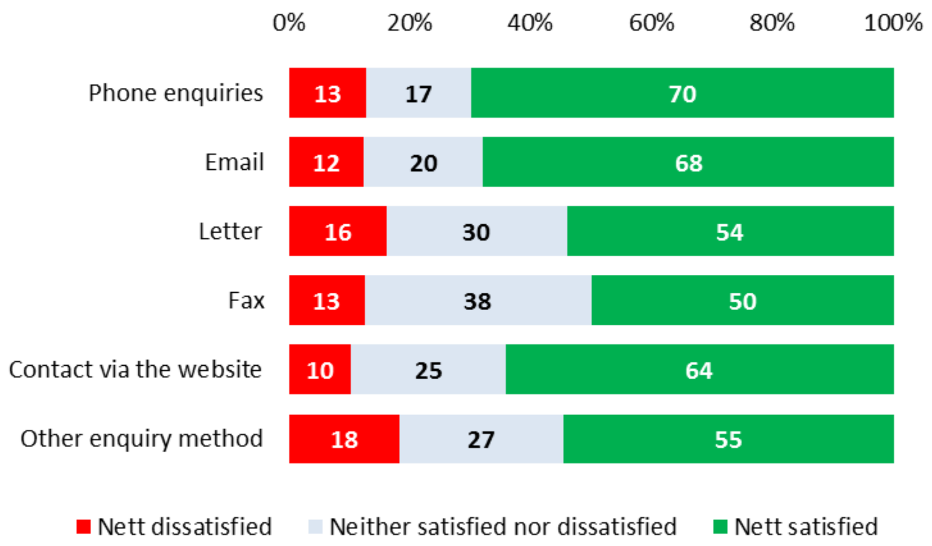
Method	2018				2017				2016			
	Imm	<2d	3-10	11+	Imm	<2d	3-10	11+	Imm	<2d	3-10	11+
Phone	24	58	14	3	28	55	14	3	29	55	13	3
Email	1	55	36	9	2	56	35	8	1	53	35	11
Letter	1	12	46	41	0	8	48	44	1	6	44	50
Fax	0	50	13	13	5	41	36	18	2	29	44	24
Web	9	51	5	10	8	52	30	10	10	48	33	10
Oth	25	35	5	15	38	29	24	10	16	25	22	38

Satisfaction with response

Satisfaction with responses is highest for those methods that offer the fastest response times. Phone (70%), email (68%) and website (64%) contacts all show Nett satisfaction levels well above other contact methods (Figure 37). These levels are generally in line with 2016 and 2017 outcomes. Continued focus on ensuring fast response times, providing clear and accurate responses and ensuring web and call architecture provides a seamless, logical and easily navigated experience for users will encourage ongoing use of and satisfaction with these channels.

Less utilised Letter, Fax and Other methods show generally lower levels of satisfaction, with around half of those who use these channels expressing satisfaction with the experience. Ongoing work to maximise the use of more responsive and interactive channels (such as the website) should be a focus for the small number of people who continue to make written or fax based contact.

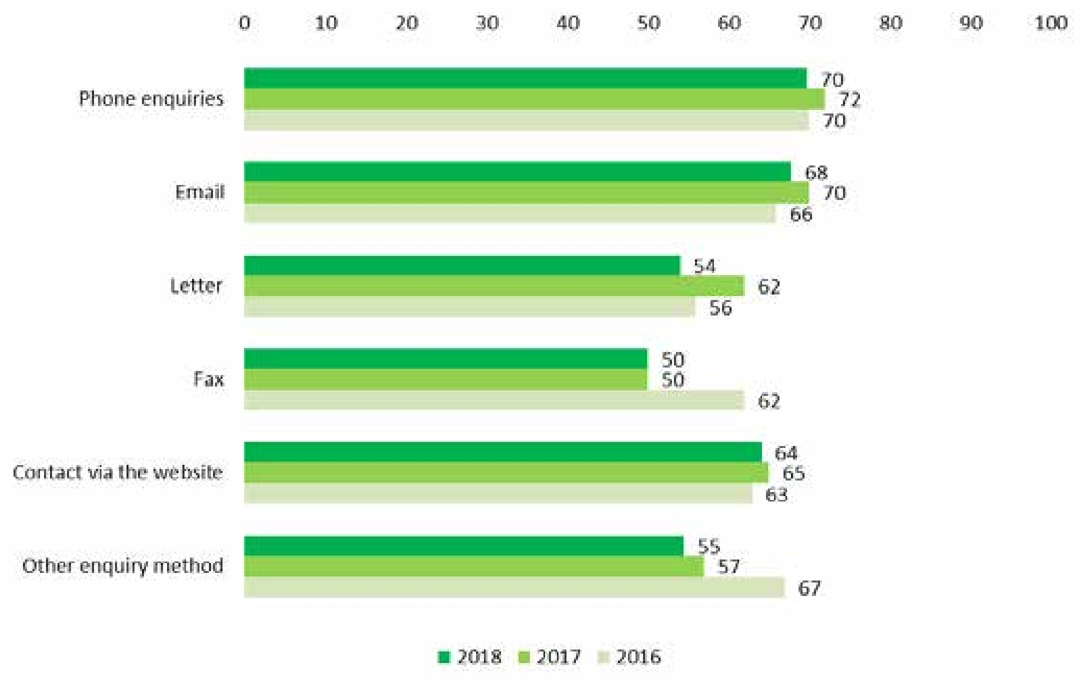
Figure 37: Satisfaction with response - contact type (%)



Phone: N=1291; Email: N=1692; Letter: N=111; Fax: N=8; Website: N=765; Other: N=8

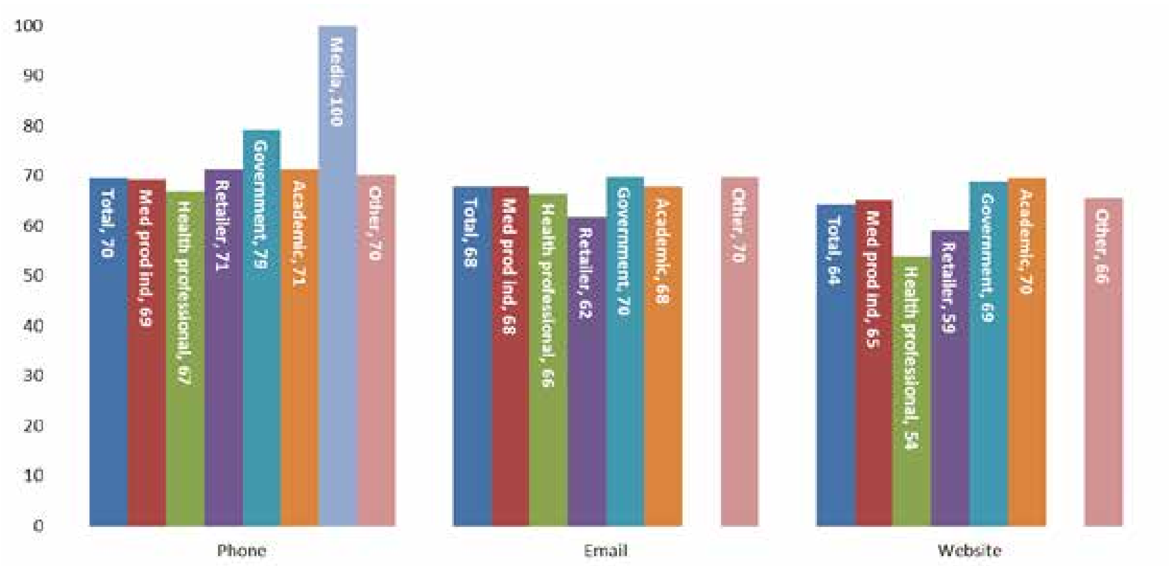
Trends across 2016-2018 show generally consistent results (Figure 38). Nett satisfaction shows some variation across years in relation to Letter and Fax contacts; however, the small numbers involved here make interpretation difficult and mean there is minimal impact from these fluctuations on overall communications satisfaction.

Figure 38: Nett satisfaction with response – 2016 - 2018 (%)



Across stakeholder categories there is some variation in satisfaction with the experience of the most common communication channels (Figure 39). Medical products industry and Government stakeholders provide generally positive ratings, while there is some fluctuation amongst Retailers and generally (although in some areas only slightly) lower outcomes amongst Health professionals.

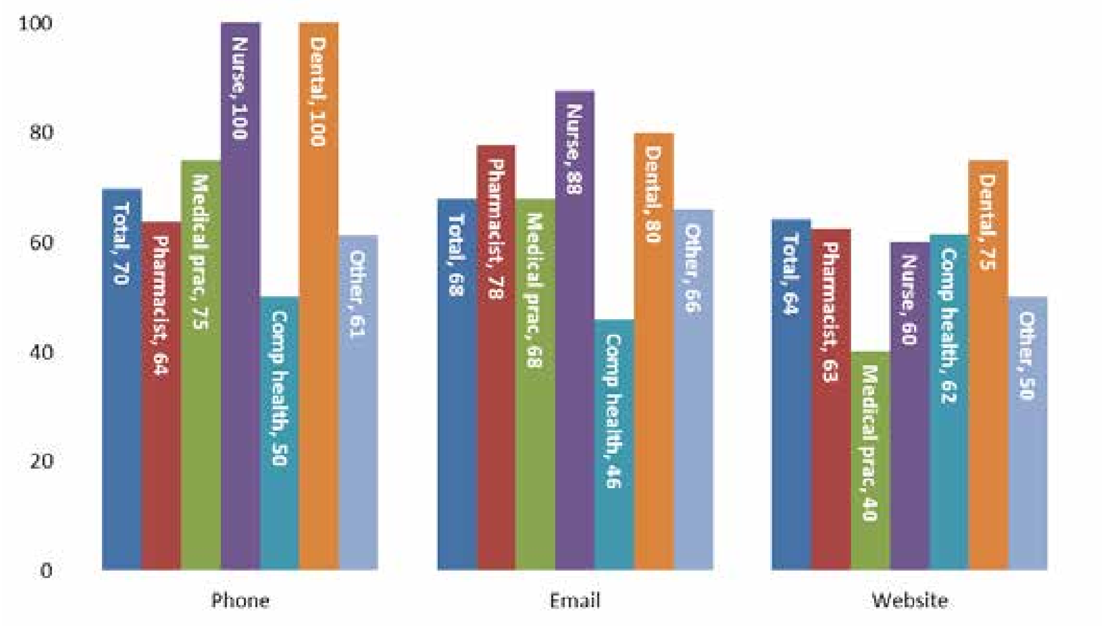
Figure 39: Nett satisfied – Phone, Email, Website - stakeholder category (%)



Med prod ind: N=516-1210; Health pro: N=76-128; Retailer: N=22-42; Gov: N=16-40; Academic: N=33-50; Media: N=0-1; Other: N=99-216.

For Health professionals the most notable outcome is a lower level of satisfaction with communication via the website (54% Nett satisfied). This reflects generally lower levels of satisfaction among all healthcare practitioner categories, although it is notable that there is a markedly lower level of satisfaction amongst Medical practitioners (40%; Figure 40; Noting that the sample sizes are small). To address this, further investigation may be required to ensure there are clear and logical pathways for these groups to identify and access the information they are seeking on the site.

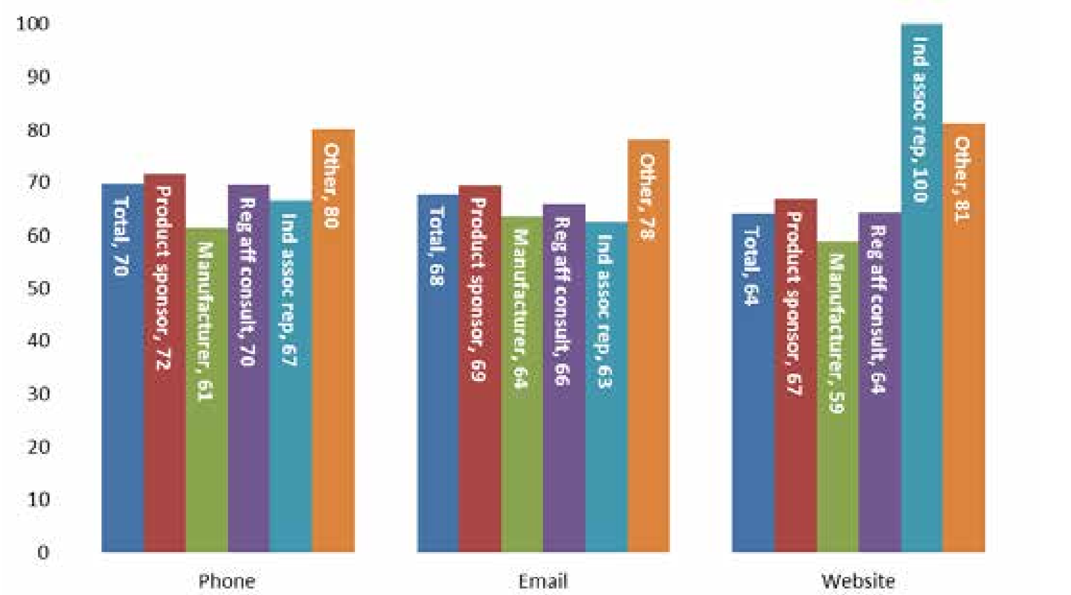
Figure 40: Nett satisfied - Phone, Email, Website – Healthcare professionals (%)



Pharmacist: N=8-18; Med prac: N=12-25; Nurse: N=8-10; Comp health: N=13-24; Dental: N=3-5; Other: N=26-47.

Product sponsors show satisfaction levels generally in line with or just above the overall average. Product manufacturers show levels slightly below the overall average, whilst Regulatory affairs consultants are generally in line with the average experience across Email, Website and Phone contacts (Figure 41).

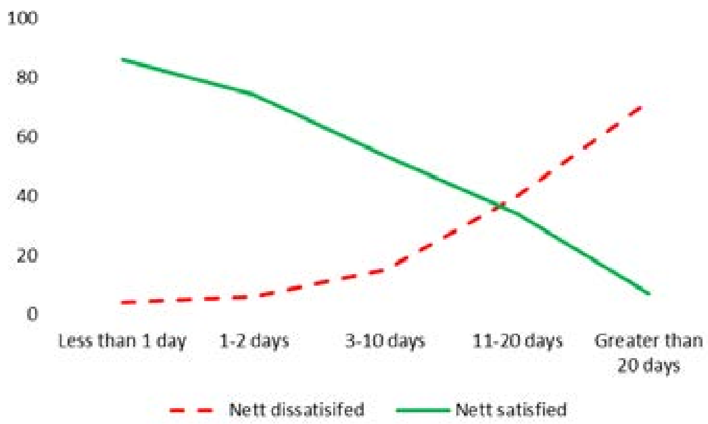
Figure 41: Nett satisfied - Phone, Email, Website – Medical products industry (%)



Sponsor: N=323-764; Manufacturer: N=144-308; Reg Affairs Con: N=28-88; Ind Assoc Rep: N=3-8; Other: N=16-41.

As noted in 2017, the major driver of satisfaction across all contact channels is the response time. Figure 42 demonstrates 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. As response times increase, the overall level of satisfaction falls and a commensurate rise in the levels of dissatisfaction is observed. Continued focus on achieving streamlined processes for responding to contacts is recommended as a method to achieve and maintain high level of satisfaction. To achieve this, a focus on ensuring each channel provides a seamless experience for users will be required. Website optimisation, web architecture, efforts to quickly identify specific tools and resources for particular stakeholders (e.g. health professionals), call architecture and call response outcomes, email handling processes (including acknowledgement, updates and follow-up) and efforts to drive down use of less responsive channels such as fax and letter all offer relevant strategies that will play a role in the final user experience and resolution times.

Figure 42: 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 68%, with 12% highlighting some level of dissatisfaction (Table 28). This level is consistent with 2017 and maintains the improvements made on this measure since the 2016 survey (Table 27 and Figure 43).

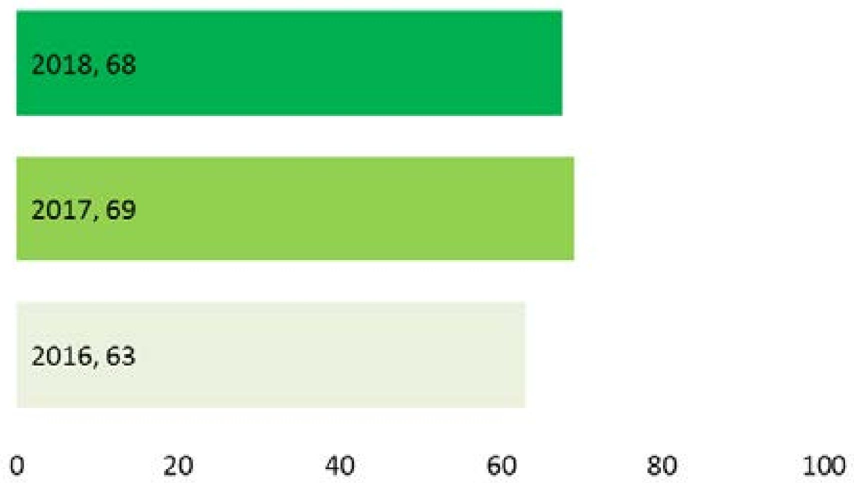
Table 27: Communication- Overall satisfaction – 2016 - 2018 (%)

Overall, how satisfied are you with the experience of communicating with the TGA?

Year	Nett dissatisfied	Neither	Nett satisfied
2016	15	22	63
2017	12	19	69
2018	12	21	68

N: 2018 - 1927; 2017 - 1977; 2016 – 2187.

Figure 43: Communications – Overall nett satisfaction – 2016-2018 (%)



N: 2018 - 1927; 2017 - 1977; 2016 – 2187.

Government (70%) and Medical products industry (68%) stakeholders show high Nett satisfaction levels, with Health professional, Retailer and Academic groups all showing slightly lower than average Nett satisfaction (Table 28). These results show some variation for Health professionals and Government stakeholders based on the previous year. Health professionals Nett satisfaction is down 9% (from 70% in 2017) and Government stakeholders Nett satisfaction rose from 49% in 2017 to 70% in 2018. The result for Retailers is also of interest for a trend toward higher dissatisfaction. Nett satisfaction for Retailers remains similar across years; however, the level of Nett dissatisfaction rose to more than one in five respondents (22% up from 16% in 2017). Monitoring and identification of specific communication needs for this group may be warranted to identify any specific communication challenges and needs. Other stakeholder categories remain consistent with previous years.

Within the Medical products industry category there is a consistent level of satisfaction, with all sub categories showing Nett satisfaction of between 65% and 70%. Consistent with other areas of the survey, Product sponsors (70%) and Regulatory affairs consultants (71%) appear slightly more likely than other groups to provide a positive rating. Despite the very small numbers involved, Industry association representatives satisfaction levels are in line with other groups in this category (67%). This is in contrast to previous years in the survey where outcomes amongst Industry association representatives were consistently lower than amongst the broader group of Medical products industry participants (e.g. in 2017 Industry association reps showed 42% Nett satisfaction).

Within the small sub samples of healthcare professionals there are large variations in the level of Nett satisfaction with communication outcomes (Table 28). Pharmacists (73%), Nurses (69%) and Dental practitioners (71%) show relatively strong levels of nett satisfaction. In contrast, Medical practitioners (53%) and Complementary healthcare practitioners (44%) show lower levels of satisfaction.

Table 28: 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
Medical products industry	11	20	68	1344
Health professional	14	25	61	167
Retailer	22	15	63	59
Government	2	28	70	47
Academic	12	24	64	58
Media	0	0	100	1
Other	10	20	70	246
Medical products industry				
Product sponsor	11	19	70	841
Product manufacturer	13	23	65	353
Regulatory affairs consultant	8	21	71	91
Industry association representative	11	22	67	9
Other	9	26	66	47
Health professional				
Pharmacist	5	23	73	22
Medical practitioner	22	25	53	32
Nurse	6	25	69	16
Complementary healthcare practitioner	25	31	44	32
Dental practitioner	0	29	71	7
Other health professional	11	23	67	57

Participants were provided with an opportunity to comment on their experience communicating with the TGA.

TGA information website

Website use

In 2018 a total of 91% of respondents highlight at least some use of the TGA website. This outcome is consistent with both the 2017 and 2016 surveys, with overall use and the pattern of frequency of use the same across the last three years (Table 29 and Figure 44). These patterns see around one in three participants using the site less than once a month and around one in four using it once a week or more often. The range of usage patterns reinforces the varying levels of familiarity and needs that users will have with the site. In this context, ensuring the logic, navigation and user friendliness of the site are maximised for a range of users and user groups should remain a priority.

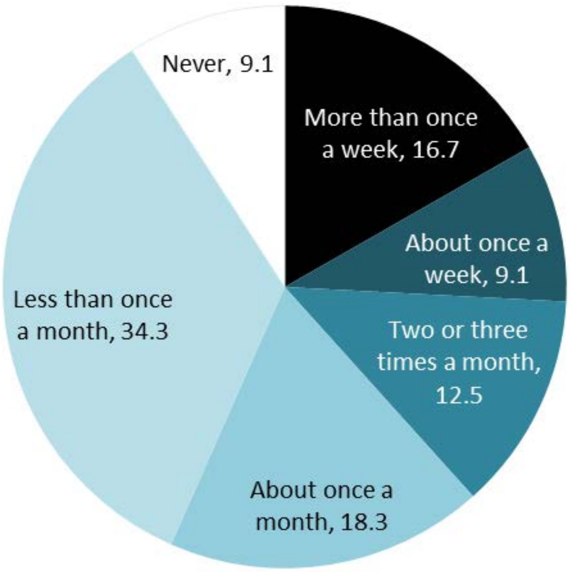
Table 29: TGA website – Frequency of use (%)

How often do you visit the TGA information website?

Frequency	2018	2017	2016
Never	9	8	8
Less than once a month	34	36	35
About once a month	18	17	19
Two or three times a month	13	11	10
About once a week	9	8	9
More than once a week	17	18	18
N	**2021**	**2194**	**2424**

Note: *Not sure* option removed for 2018. 2016 and 2017 both recorded 2% in this category.

Figure 44: TGA website – Frequency of use (%)



N=2,021

Overall use (ever used) is high across all stakeholder groupings in the survey, at more than 80% for all groups. Leading user groups are Medical products industry (93%) and Government (92%). Those most familiar with the site (reflected by regular weekly or more often use of the site) are Medical products industry (31%) and Government (32%) groupings with other major groupings all showing regular use at less than one in ten participants (Table 30). Regulatory affairs consultants represent the most regular visitors to the site, with 59% of this grouping reporting regular visits. Within the Medical products industry, Product sponsors (34%) and Industry association representatives (33%) also showed high levels of site visitation. Product manufacturers were also fairly regular visitors (17%).

Within the Medical products industry, the most frequent use is also associated with the size of the organisation (as indicated by the number of employees; Figure 45). As was observed in 2017, website use generally increases with organisational size. The exception here is organisations with 200-599 employees, who recorded the highest level of frequent use in the current survey (54%). Although the pattern is similar to 2017, it is notable that it is not as marked as 2017, where the largest employers recorded frequent use of almost 70% (Figure 46).

Table 30 Table 30: TGA website –Frequent use by Stakeholder, Industry, and Health professionals (%)

How often do you visit the TGA information website?

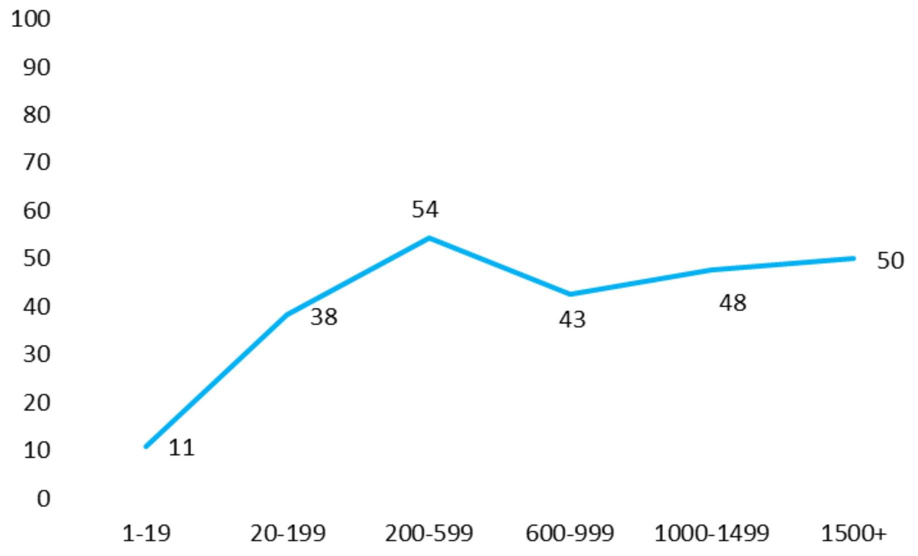
Stakeholder category	Weekly or more often	Any use
Medical products industry	31	93
Health professional	9	82
Retailer	5	84
Government	32	92
Academic	8	83
Media	50	100
Other	18	89
Medical products industry		
Product sponsor	34	94
Product manufacturer	17	89
Reg affairs consultant	59	99
Ind assoc'n rep	33	89
Other	22	90
Health professional		
Pharmacist	27	96
Medical practitioner	0	74
Nurse	0	81

Stakeholder category	Weekly or more often	Any use
Compl healthcare prac	16	86
Dental practitioner	0	75
Other	5	80

Stakeholder cat: Med prod ind: N=1,388; Health pro: N=187; Retailer: N=61; Gov: N=53; Academic: N=63; Media: N=2; Other: N=262. **Med prod Ind:** Sponsor: N=858; Manufacturer: N=370; Reg Affairs: N=96; Ind Assoc Rep: N=9; Other: N=51. **Health pro:** Pharmacist: N=26; Med prac: N=38; Nurse: N=21; Comp health: N=37; Dental: N=8; Other: N=56.

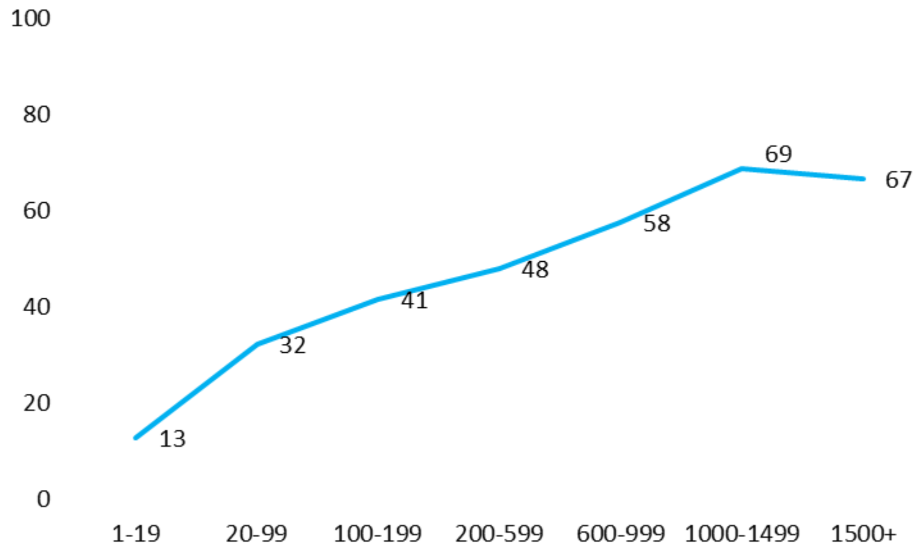
Regular use is generally low for Health professionals (9%), although within this grouping regular users were almost entirely comprised of Pharmacists (27% regular use) and Complementary healthcare practitioners (16%).

Figure 45: TGA information website – Frequent use (Weekly or more) by employee numbers (Medical products industry) - 2018 (%)



1-19: N=544; 20-199: N=392; 200-599: N=202; 600-999: N=47; 1000-1499: N=21; 1500+: N=18

Figure 46: TGA information website – Frequent use (Weekly or more) by employee numbers (Medical products industry) - 2017 (%)



1-19: N=499; 20-99: N=288; 100-199: N=94; 200-599: N=176; 600-999: N=40; 1000-1499: N=16; 1500+: N=21.

The patterns here highlight the potential to segment various groups using frequency of site usage as a key variable. Particular opportunities exist to identify and respond to the core business needs of regular users within the Medical products industry whilst also providing clearly identified paths for less regular users (such as Health professionals) who are likely to be seeking specific information or advice from the site.

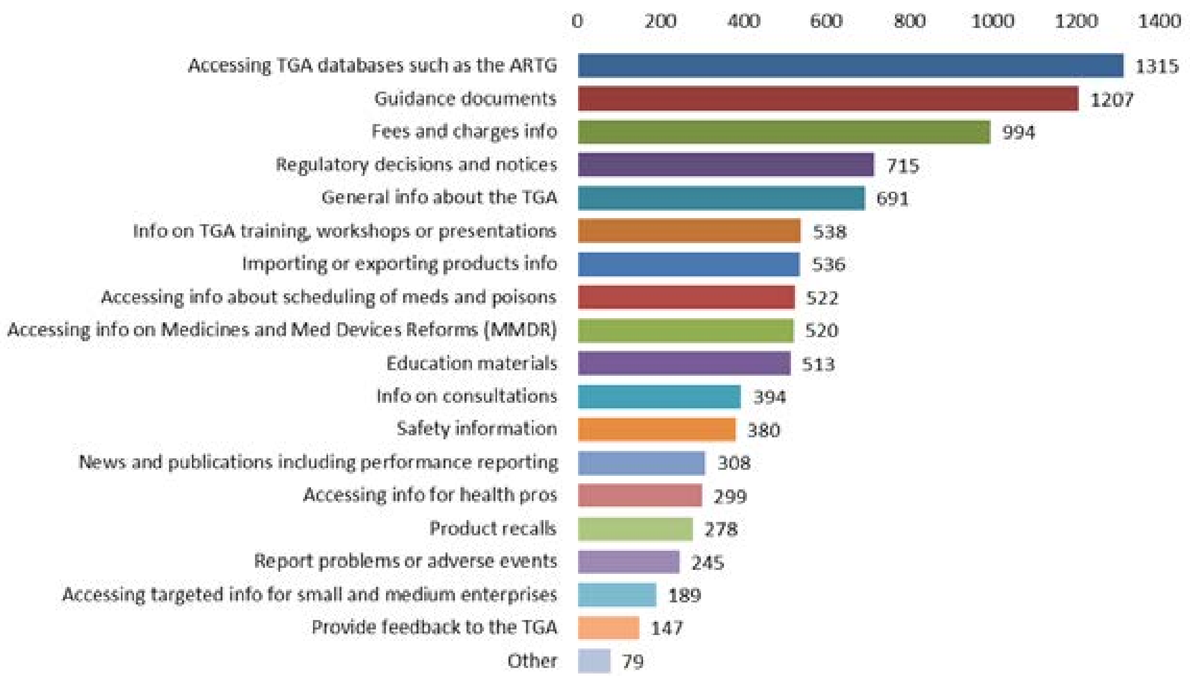
Participants highlight a range of reasons for use of the website (Figure 47). The most common reasons include to Access databases, Seek guidance documents, and Seek fees and charges information. This pattern is similar to 2017, although there is a slight shift in the most common reason highlighted for visiting the site, with Access to databases moving from the second most common reason, displacing Guidance documents as the most common reason for visiting.

In addition to the reasons pre-coded in the survey, participants highlight a range of other reasons for visiting the website. It is notable that some of the reasons specified are likely to relate to services accessed through the eBusiness portal. Reasons outlined include accessing, seeking or providing information about:

- Guidelines.
- Legislative changes.
- ACE.
- Fees.
- New products.
- Advertising.
- Clinical trials.
- Administration.
- Applications.
- School/University assignment.

- Medicines shortages.
- Advice general.
- Registrations.
- TGA reforms.
- Adverse event notifications and information.
- Goods manufacturing practice.
- Medical devices.
- Medicines shortages.
- Medicines and complementary medicines
- Inspections.
- Labelling requirements.
- Pharmaceutical Benefits Advisory Committee.
- Privacy information.
- Special access scheme.
- ATRG search.
- Advertising complaints.
- Complaints – other.

Figure 47: TGA website – Reasons for visiting (N)



Overall the pattern of identified reasons is highly consistent with results over the previous two years of the survey. These patterns reinforce the broad range of uses and information requirements of visitors to the site amongst the key stakeholder audiences targeted by this survey. Ongoing monitoring and targeted user feedback channels for users of the site will allow further development and identification of information gaps, navigation issues and potential opportunities to optimise the usability of the website design.

Use of website tools

Amongst a list of tools presented, 84% of website visitors highlight using one or more tools (Table 31). The most commonly used tool is the Search function, which has been used by almost 9 in 10 users of the TGA website. Downloadable fact sheets are also very commonly accessed tools across the range of visitors to the site (65%). Interactive tools (24%) and videos (12%) are used by fewer yet still substantial numbers of users.

Table 31: TGA website – Use of website tools

Which of the following additional tools on the TGA website have you used?

Tools	N	%
Interactive tools such as decision trees	373	24.1
Downloadable fact sheets	998	64.6
Videos	191	12.4
Search function	1373	88.8
None of the above	243	15.7
Total answering	1546	

Base: Visit the TGA website

Table 32: TGA website – Number of website tools selections N)

Number of selections (excluding None)	N
1	560
2	663
3	243
4	80

The pattern of use of the various tools is generally consistent across stakeholder groups, with the search function representing the most commonly used tool across all groups, followed by downloadable fact sheets (Table 33).

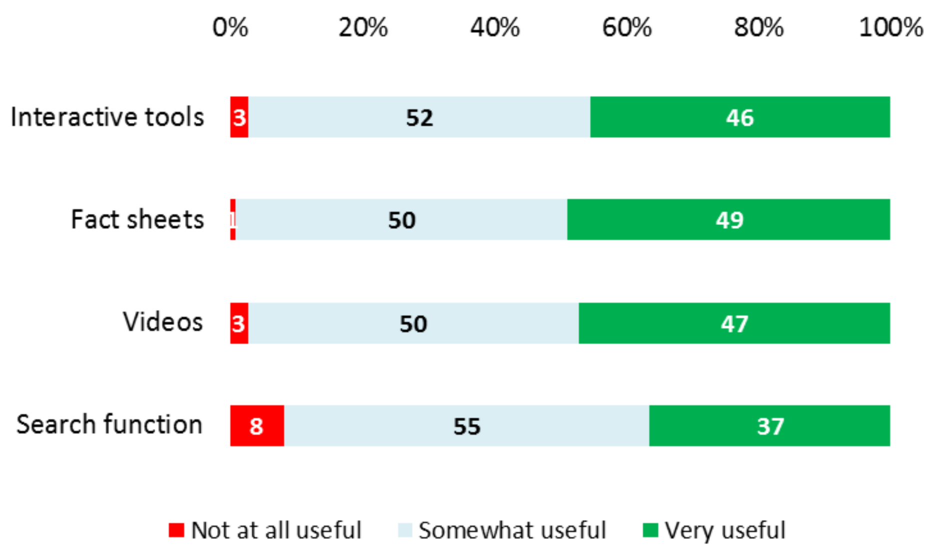
Table 33: TGA website –use of website tools by stakeholder group (N)

Which of the following additional tools on the TGA website have you used?

Use of tools	Interactive tools	Downloadable fact sheets	Videos	Search function	None of the above
Total	373	998	191	1373	243
Medical products ind	292	689	134	987	152
Health professional	14	84	15	93	33
Retailer	12	30	3	35	9
Government	9	24	7	35	8
Academic	8	34	7	40	6
Media	1	2	1	2	0
Other	36	132	23	177	35

When asked to rate the usefulness of the various tools, Fact sheets (49% Very useful), Videos (47%) and Interactive tools (46%) all showed strong levels of Very useful ratings coupled with very low levels of Not at all useful ratings (between 1% and 3%; Figure 48). Search function ratings are less favourable, although the strong majority of users feel the search function is either Somewhat useful (55%) or Very useful (37%).

Figure 48: TGA website – Website tools – Usefulness (%)



Interactive tools: N=371; Fact sheets: N=981; Videos: N=188; Search: N=1,329

The usefulness of the various tools as rated across the range of stakeholder groups in the survey is shown in Tables 34-37. Patterns here highlight that for the Interactive tools, Fact sheet, and Video categories there is a higher level of usefulness identified amongst Medical products industry, Retailer and Academic participants and lower outcomes amongst Health professionals. This pattern is not replicated in relation to the Search function tool, where perceived usefulness is similar for all stakeholder groups.

Table 34: TGA website – Interactive tools – Usefulness (%) by stakeholder group

How useful did you find: Interactive tools (e.g. Decision trees)

Stakeholder group	Not at all useful	Somewhat useful	Very useful	N
Total	2.7	51.8	45.6	371
Medical products industry	2.8	50.3	46.9	290
Health professional	0.0	64.3	35.7	14
Retailer	8.3	41.7	50.0	12
Government	0.0	66.7	33.3	9
Academic	12.5	37.5	50.0	8
Media	0.0	0.0	100.0	1
Other, please specify	0.0	61.1	38.9	36
No answer	0.0	100.0	0.0	1

Table 35: TGA website – Fact sheets – Usefulness (%) by stakeholder group

How useful did you find: Fact sheets

Stakeholder group	Not at all useful	Somewhat useful	Very useful	N
Total	0.7	50.4	48.9	981
Medical products industry	0.7	49.9	49.4	676
Health professional	1.2	59.0	39.8	83
Retailer	0.0	41.4	58.6	29
Government	0.0	70.8	29.2	24
Academic	0.0	55.9	44.1	34
Media	0.0	0.0	100.0	2
Other, please specify	0.8	45.4	53.8	130
No answer	0.0	33.3	66.7	3

Table 36: TGA website – Videos – Usefulness (%) by stakeholder group

How useful did you find: Videos

Stakeholder group	Not at all useful	Somewhat useful	Very useful	N
Total	2.7	50.0	47.3	188
Medical products industry	2.3	48.1	49.6	131
Health professional	6.7	66.7	26.7	15
Retailer	0.0	33.3	66.7	3
Government	0.0	85.7	14.3	7
Academic	14.3	28.6	57.1	7
Media	0.0	0.0	100.0	1
Other, please specify	0.0	47.8	52.2	23
No answer	0.0	100.0	0.0	1

Table 37: TGA website – Search function – Usefulness (%) by stakeholder group

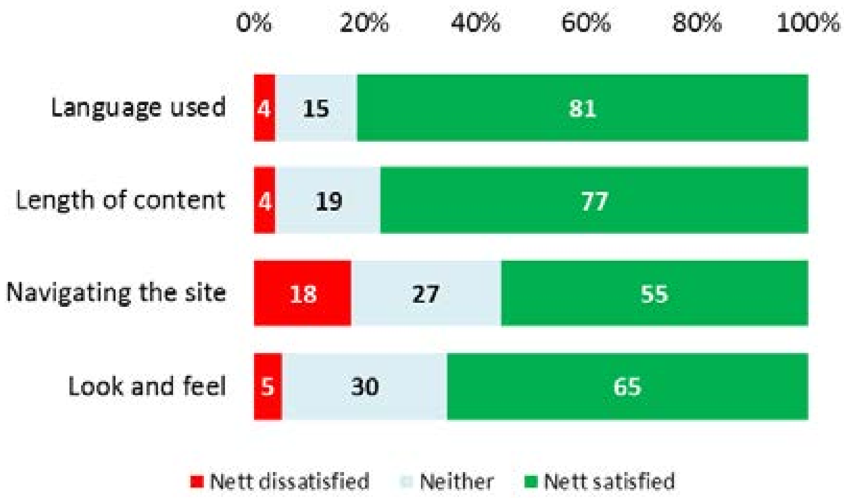
How useful did you find: Search function

Stakeholder group	Not at all useful	Somewhat useful	Very useful	N
Total	8.1	55.4	36.6	1329
Medical products industry	8.9	53.7	37.4	954
Health professional	4.5	62.9	32.6	89
Retailer	11.8	61.8	26.5	34
Government	2.9	67.6	29.4	34
Academic	7.5	57.5	35.0	40
Media	0.0	0.0	100.0	2
Other, please specify	5.8	57.2	37.0	173
No answer	0.0	66.7	33.3	3

Website satisfaction

Satisfaction with the four characteristics of the website tested shows marked variation (Figure 49). The Length of content and Language used is positively viewed, with 77% and 81% Nett satisfaction respectively and a minimal 4% Nett dissatisfaction. The Look and feel of the site is also generally positively received, with 65% Nett satisfaction strongly outweighing the minimal 5% Nett dissatisfaction. Site navigation is less positively viewed with only 55% Nett satisfaction and substantial levels of dissatisfaction (18%) pointing toward the clearest opportunity to improve user experience of the site.

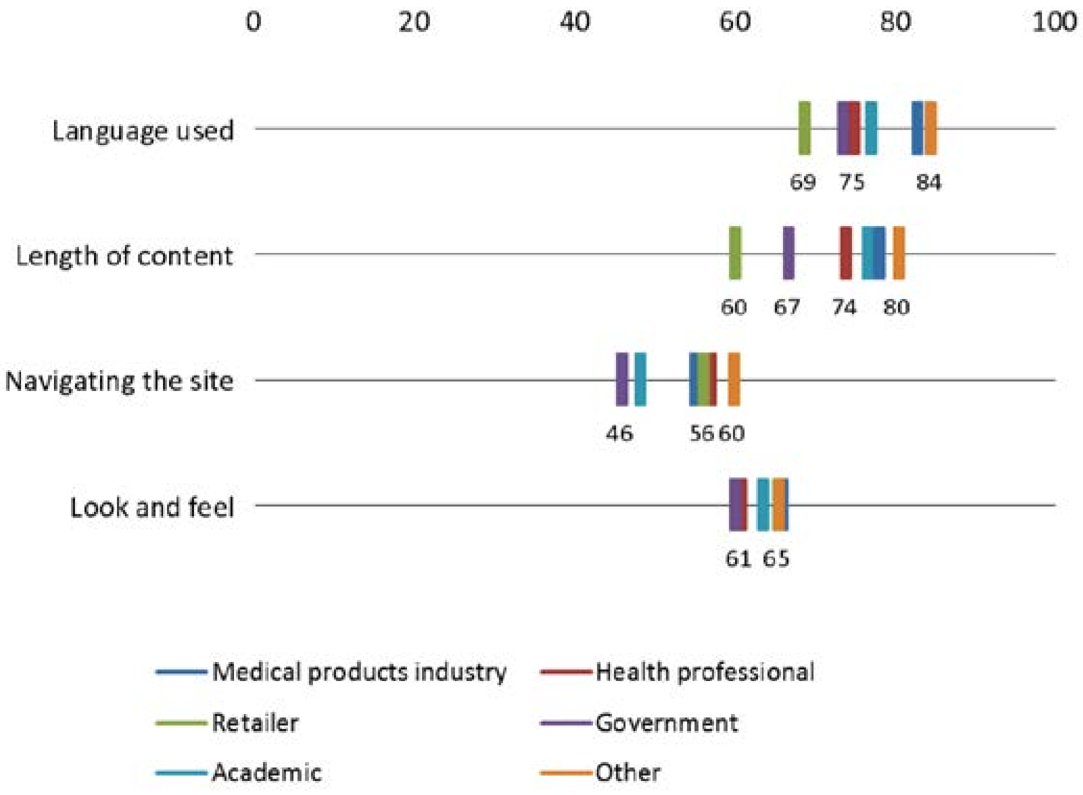
Figure 49: TGA website – Satisfaction (%)



N=1806-1813

Nett satisfaction with the various features of the site across stakeholder groups is varied (Figure 50). Retailers and Government stakeholders appear less likely to express satisfaction with the Language and Length of content, while Medical products industry and Other participants show strong levels of satisfaction across these measures. Government and Academic users appear less favourable with regards to Navigating the site, while the look and feel of the site is generally viewed similarly across the various stakeholders in the survey. There does not appear to be a strong association here with overall use of the site, with the two most frequent user groups (Medical products industry and Government) showing diverse outcomes across measures.

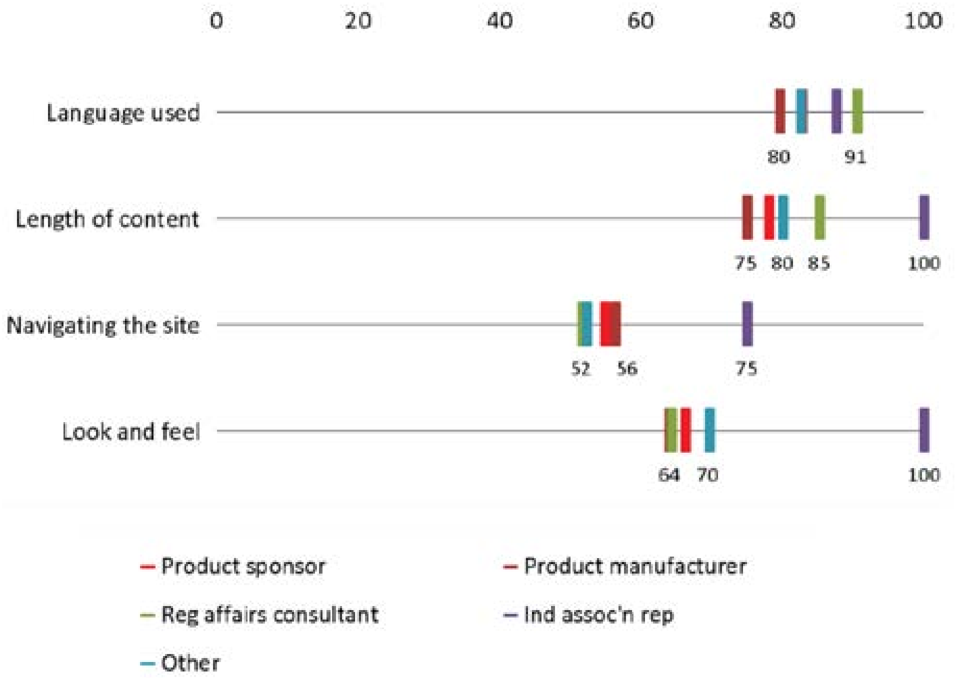
Figure 50: TGA website – Nett satisfaction by Stakeholders (%)



Med prod ind: N=1,273; Health pro: N=151; Retailer: N=51; Gov: N=49; Academic: N=52; Media: N=2; Other: N=231.

In the context of generally high ratings by the Medical products industry, high satisfaction with the language and Length of content is most commonly observed amongst Regulatory affairs consultants and Industry association representatives (Figure 51). Product manufacturers show the lowest level of satisfaction across these measures. Navigation of the site shows less variation, with the exception of Industry association representatives, who rate both areas relatively favourably.

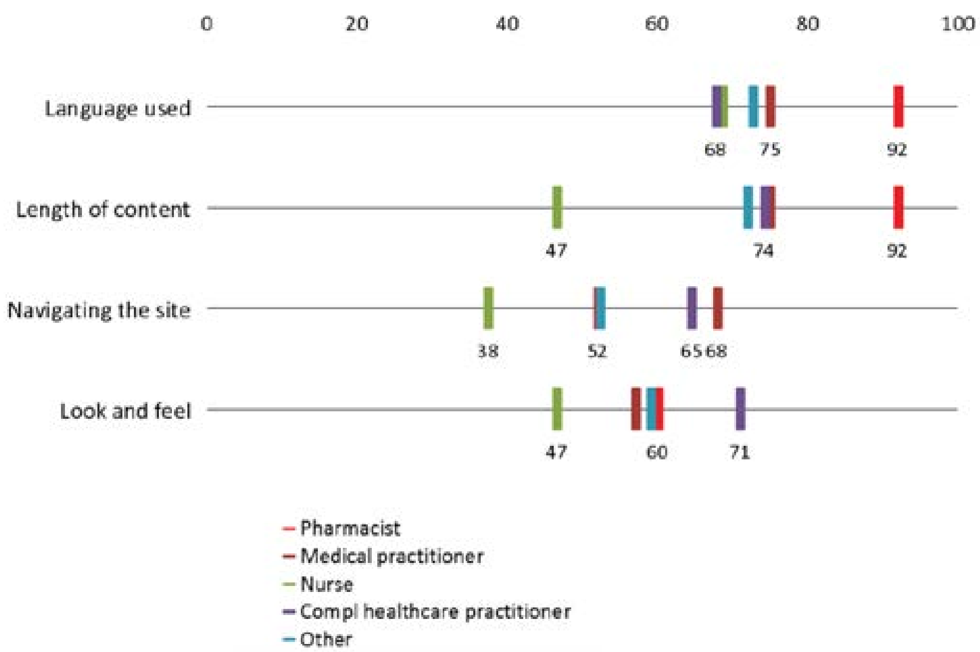
Figure 51: TGA website – Nett satisfaction Medical products industry (%)



Sponsor: N=796-797; Manufacturer: N=322-324; Reg Aff consult: N=95; Ind assoc'n rep: N=8; Other N=45-46.

There is marked variation across measures of satisfaction with the website amongst Health professional groupings (Figure 52). The Language used and Length of content show strong Nett satisfaction among Pharmacists. Nurses show generally low levels of satisfaction across Length of content, Navigation and Look and feel measures. Medical practitioners and Complementary healthcare practitioners appear more likely to show satisfaction with the site navigation, with Complementary health practitioners also favouring the look and feel of the site more commonly than other groups here.

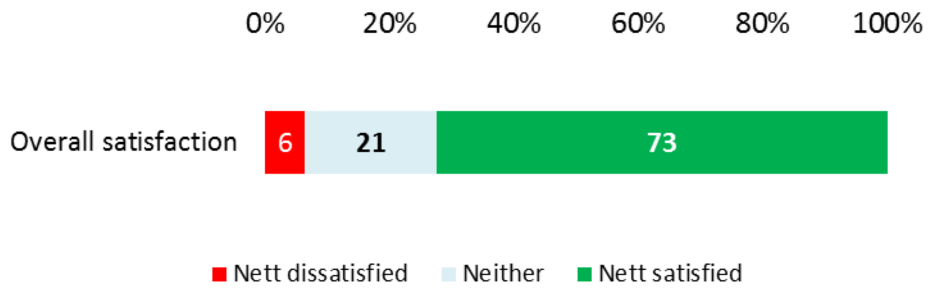
Figure 52: TGA website – Nett satisfaction – Health professionals (%)



Pharmacist: N=25; Med prac: N=28; Nurse: N=15-16; Comp health: N=31; Dental: N=6; Other: N=43-44.

Overall satisfaction with the website is strong, showing a high level of Nett satisfaction (73%) coupled with low levels of Nett dissatisfaction (6%; Figure 53). This outcome is consistent with the survey findings in 2017 and maintains the slight improvement observed since 2016 (Table 38).

Figure 53: TGA website – Satisfaction (%)



N=1,805

Table 38: TGA website – Overall satisfaction – 2016 - 2018 (%)

Overall, how satisfied are you with the TGA information website?

Year	Nett dissatisfied	Neither	Nett satisfied
2016	7	24	69
2017	6	23	72
2018	6	21	73

2018: N= 1,805; 2017: N=1,953; 2016: N=2,165.

Nett satisfaction with the website varied from 74% amongst those in the Medical products industry and 73% amongst Academics down to 62% and 63% for Health professionals and Retailers respectively (Table 39). Dissatisfaction is consistently low amongst most groups, with the exception here being Retailers, with almost one in five expressing dissatisfaction with the site.

Table 39: TGA website – Overall satisfaction by stakeholder category, Industry and Health professionals (%)

Overall, how satisfied are you with the TGA information website?

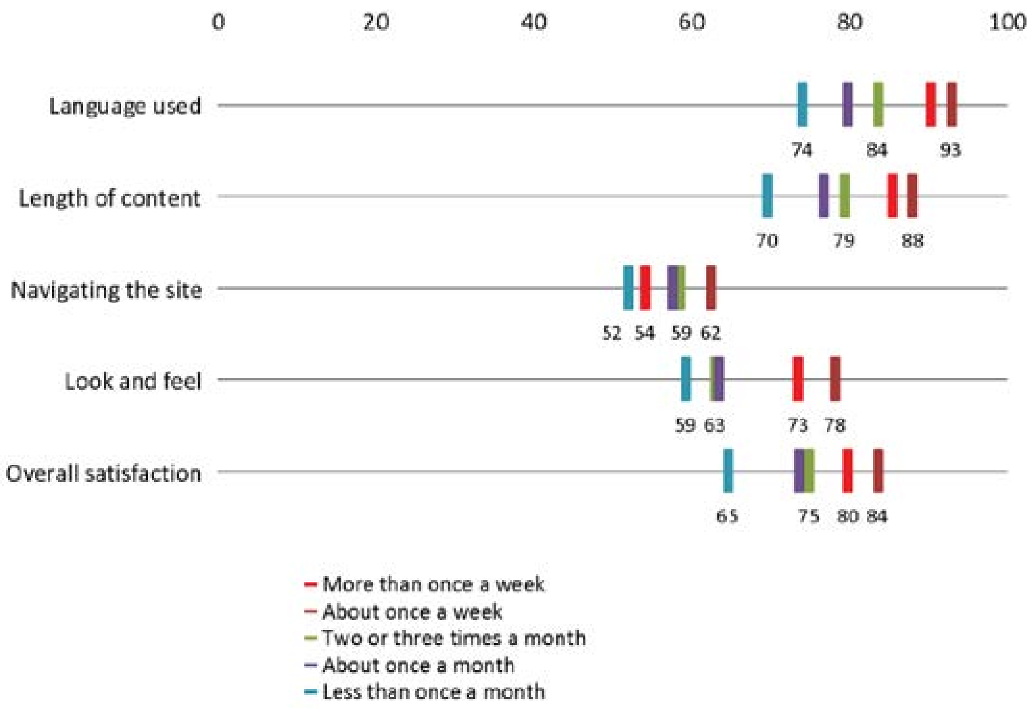
Category	Nett dissatisfied	Neither	Nett satisfied	N
Medical products industry	6	20	74	1270
Health professional	7	31	62	148
Retailer	18	18	63	49
Government	6	27	67	49
Academic	8	19	73	52
Media	0	0	100	2
Other	8	18	74	231
Medical products industry				
Product sponsor	6	20	74	768
Product manufacturer	5	24	72	279
Regulatory affairs consultant	6	13	81	92
Industry association representative	0	12	88	8
Other	2	20	78	40
Health professional				
Pharmacist	0	16	84	25
Medical practitioner	7	30	63	27
Nurse	13	47	40	15
Complementary healthcare practitioner	0	42	58	31
Dental practitioner	33	0	67	6
Other health professional	9	33	58	43

The high level of satisfaction among Medical products industry participants is driven by good satisfaction levels across all groups in this category. In particular, Regulatory affairs consultants (81%) and the small number of Industry association representatives (88%) show strong satisfaction with the website, while Product sponsors (74%) and Product manufacturers (72%) have satisfaction levels around the average for this group.

Among health professionals there is wider disparity in ratings of the website, although care should be taken in interpretation of these outcomes due to the small number of responses involved. Strong levels of satisfaction amongst Pharmacists (84%) are in contrast to lower levels of satisfaction for Medical practitioners (63%), Complementary healthcare practitioners (58%), Nurses (40%) and Other health professionals (58%).

As observed in the 2017 survey, familiarity gauged through the frequency of use of the site appears strongly related to the satisfaction ratings provided (Figure 54). In particular, those who use the site least (Less than once a month) show lower Nett satisfaction levels across the range of satisfaction measures captured. Those who use the site about once a week consistency show the highest levels of satisfaction and the most frequent users similarly show strong satisfaction across most measures (with the exception of the Navigation experience).

Figure 54: TGA website – Satisfaction measures by frequency of use (%)



More than once a week: N=335-337; About once a week: N=181-183; 2-3 times a week: N=251-249; About once a month: N=360-364; Less than once a month: N=676-681.

Feedback on the TGA website included an opportunity to provide comments outlining the reasons for the overall rating of the site. More than 600 comments and suggestions were received in relation to this opportunity in the survey. Consistent with previous years, the overwhelming majority of comments relate to ease of navigation and simplicity of use of the website. These comments commonly relate to specific aspects of navigating the site, the logical structure of information, the ability to find and search for relevant information as well as the simplicity and ease of understanding of information provided. Ensuring that the site provides an intuitive and simple experience emerges as a key theme, with increasing expectations and comparisons to app based simplicity experienced across a range of consumer areas in everyday life setting the standard of expectations.

TGA Business Services website

TGA Business Services website - Use

A total of 83% of survey participants highlight that they use the TGA Business Services website (Table 40 and Figure 55). Consistent with previous years' insights, around one in four are regular users (once a week or more), 9% report using the site two or three times a month and a further one in four (25%) use the site about once a month. While it is apparent that there has been an increase in the number of people reporting use 'About once a month' between 2017 and 2018 (from 14% to 24%), this rise and the commensurate fall in the number of people reporting the least frequent use category is difficult to interpret due to a change in the scale employed on this question. The 2018 questionnaire employed the scale 'About once a year' where the 2017 and 2016 surveys employed the scale point 'Less than once a month'.

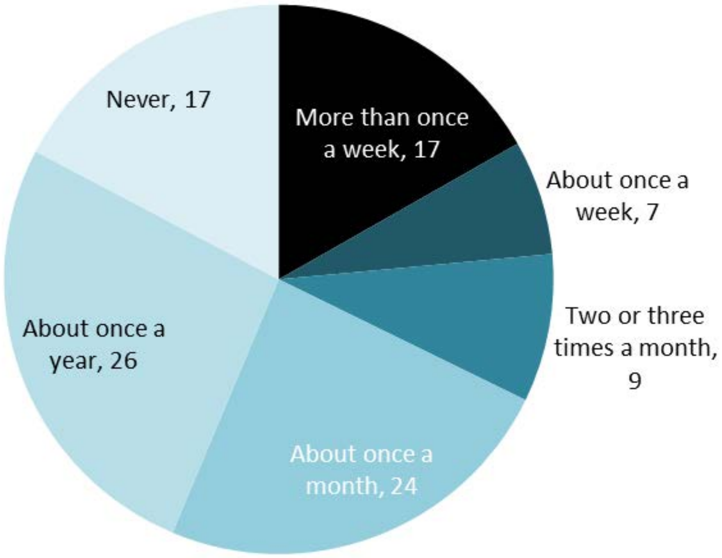
Table 40: TGA Business services website - Frequency of use – 2016-2018 (%)

How often do you visit the TGA Business Services website?

Frequency	2018	2017	2016
Never	17	17	19
About once a year	26	33	32
About once a month	24	14	12
Two or three times a month	9	9	10
About once a week	7	7	6
More than once a week	17	18	19
N	**1985**	**2153**	**2391**

Note: Scale changes in 2018 "*About once a year*" was previously "*Less than once a month*". 2016 and 2017 included a "*Not sure*" option (2% and 3% respectively).

Figure 55: TGA Business services portal – Frequency of use (%)



N=2,153

Use of the site varies across stakeholder categories (Table 41), 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 high use rates, with only 12% of this group Never using the site.

Health professionals show the lowest overall level of use of the site, with a notable 12% fall in the overall use amongst this group between 2017 and 2018. This reflects a general trend towards falls in overall use between 2017 and 2018 in most categories outside the largest core group of industry users (Table 41).

Table 41: TGA Business services website – Frequency of use by Industry, Community and Health professional categories (%)

How often do you visit the TGA information website?

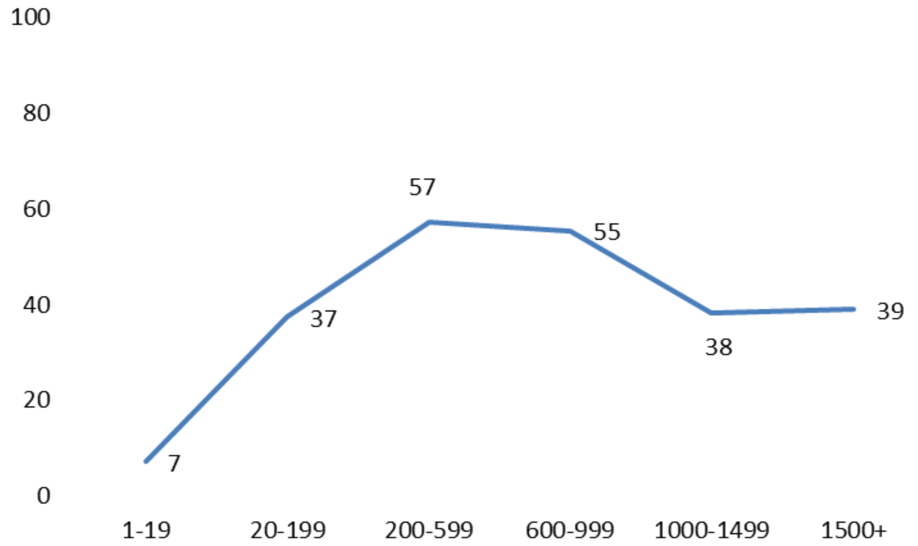
Stakeholder category	Weekly or more often	Any use	% change any use (2017)
Medical products industry	30	88	+1
Health professional	7	56	-12
Retailer	3	73	-6
Government	17	72	-7
Academic	10	78	+4
Other	13	79	-2
Medical products industry			
Product sponsor	35	92	-2
Product manufacturer	12	78	-11
Reg affairs cons't	57	96	-1
Ind assoc'n rep	38	100	0
Other	18	80	-11
Health professional			
Pharmacist	15	54	-18
Medical practitioner	0	32	-5
Nurse	0	47	-18
Compl healthcare prac	17	58	-17
Dental practitioner	0	63	-12
Other	4	75	-5

Stakeholder cat: Med prod ind: N=1,360; Health pro: N=182; Retailer: N=62; Gov: N=53; Academic: N=63; Media: N=2; Other: N=258. **Med prod ind:** Sponsor: N=842; Manufacturer: N=360; Reg Affairs Con: N=96; Ind Assoc Rep: N=8; Other: N=50. **Health pro:** Pharmacist: N=26; Med prac: N=37; Nurse: N=19; Comp health: N=36; Dental: N=8; Other: N=55.

Within the Medical products industry, Regulatory affairs consultants (57% Accessing weekly or more often), Industry association reps (38%) and Product sponsors (35%) 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 five (22%) indicating they *Never* use the site and just over one in ten accessing it weekly or more often.

Frequency of use, continues to be strongly associated with the number of employees of companies in the Medical products industry (Figure 56). Frequent levels of use are lowest in smaller entities of 1-19 employees (7%) and rise steadily to their highest levels amongst companies with 200-599 (57%; 2017 56%) and 600-699 (55%; 2017 62%) employees. Unlike in 2017, larger organisations with 1000-1499 (38%; 2017 63%) employees showed lower levels of frequent access than some smaller entities.

Figure 56: TGA business services website – Frequent use (Weekly or more) by employee numbers (Medical products industry - %)

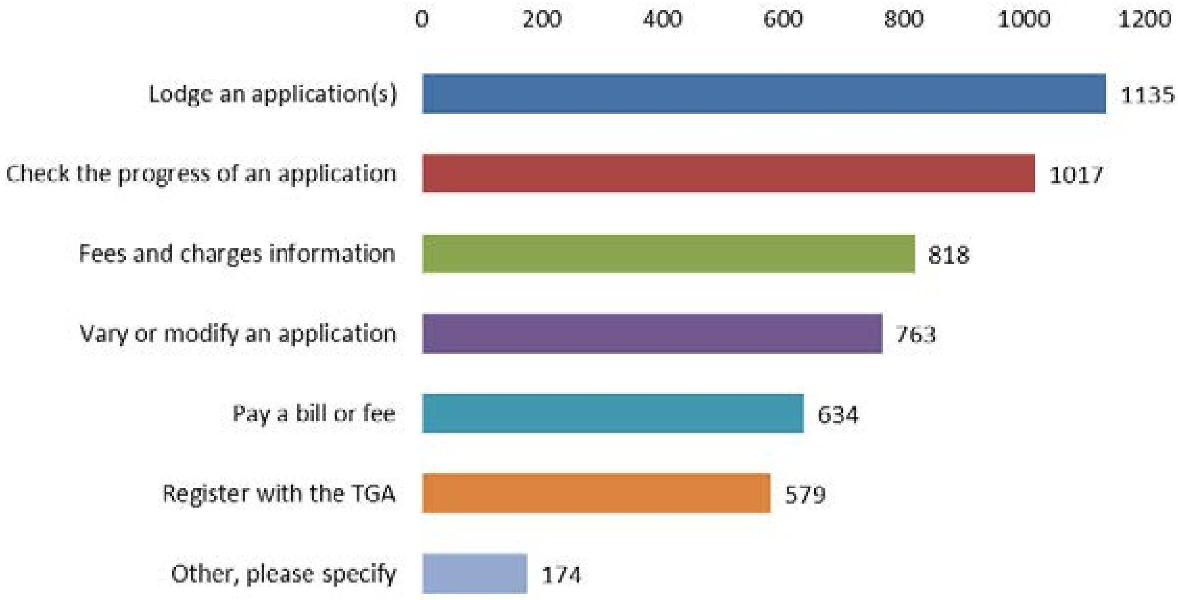


1-19: N=529; 20-199: N=383; 200-599: N=200; 600-999: N=47; 1000-1499: N=21; 1500+: N=18.

For the small number of participants in Health professionals groups, there are very low levels of regular engagement, with no participants among Medical, Dental and Nurse categories highlighting weekly or more frequent use of the site. Large proportions of all groups in the Health professionals category also report Never using the business services site, including more than two thirds of Medical practitioners, around half of Pharmacists and Nurses and just over four in ten Complementary healthcare practitioners.

Reasons for visiting are highly consistent over time, with the patterns shown in Figure 57 almost identical to that observed in 2017 (In 2017 more people identified ‘Register with the TGA’ than ‘Pay a bill or fee’). Reasons most commonly relate to Lodgement of applications or Checking the progress of applications as well as Varying or modifying an application. 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 57: TGA business services website – Reasons for visiting (N)



N=1,626

As would be expected, most visitors to the site highlight multiple reasons for visiting (Table 42). Most commonly this involves multiple reasons related to the lodgement, progress and modification of an application.

Table 42: TGA Business services website – Reasons for visiting – number of reasons selected (%)

Number of selections	N
1	357
2	280
3	313
4	281
5	237
6	151
7	7
Total responses	1626

Other reasons for accessing the business services website identified in free text responses include a range of issues. These commonly focus on the following broad areas:

1. Searches.
2. Access to database and lists.
3. Administrative functions.
4. Reporting and notification requirements.
5. General information.

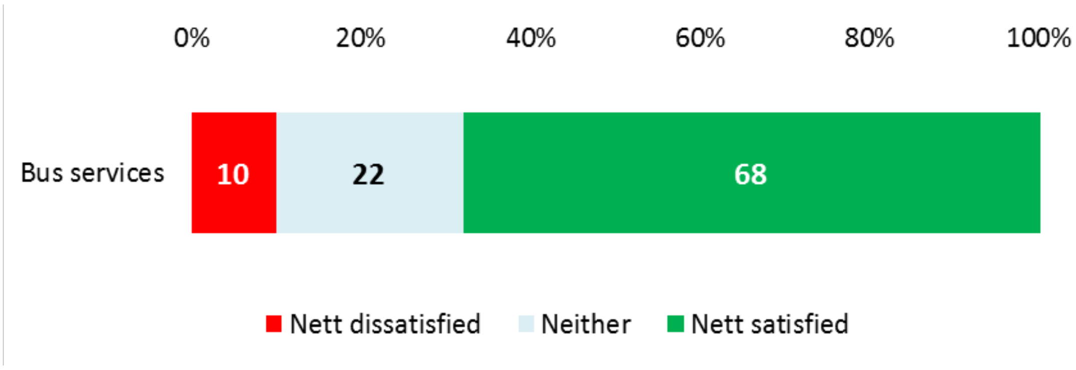
Specific reasons within these categories include:

- Access to and searches of:
  - Permissible ingredients database.
  - Australian Register of Therapeutic Goods.
  - Medicine or complementary medicine information.
  - Device information.
  - Checking details such as manufacturing licenses.
  - Permitted indications.
  - Ingredient search.
  - Indications listings.
  - GMDN code identification.
  - Medicines shortages.
  - Recalls information.
  - Other databases/Information/Codes.
- Adverse events reporting.
- Medical device incident reporting and Medical device information.
- Importation rulings information.
- Application processes/status checks.
- Clinical trials notifications.
- Account administration (e.g. registration, adding users, updating contact details, payments, password resets).
- Downloading certificates.
- Employment.
- Research.
- Manufacturing information.
- ACE Scheme.
- Audit and audit preparation.
- Pharmacovigilance.
- Special Access Scheme.

TGA Business services website – Satisfaction

Ratings of satisfaction with the Business services website highlight 68% of users are either Satisfied (56%) or Very satisfied (12%) with the site (Figure 58). This is slightly higher than the outcome for 2017, with Nett satisfaction at 66% (2016 65%).

Figure 58: TGA business services website – Satisfaction (%)



N=1,629

Medical products industry users represent both the largest and most satisfied group of users of the site (71% Nett satisfaction; Table 43). Amongst other groups in the survey there are consistently lower levels of Nett satisfaction and higher levels of dissatisfaction with the site. Health professionals (52% Nett satisfaction), Government (53%), Academic (53%) and Retailer (60%) groups all show relatively low levels of satisfaction. Dissatisfaction for these groups is greater than 10% of users. This may reflect a strong focus on core business experiences for users of the site, with the potential to improve the experience for those who are either not regular users or for whom the use of the site falls outside of the standard business models for which it is designed.

Within the Medical products industry, satisfaction remains generally strong, driven by strong levels of satisfaction and low dissatisfaction within the large group of Product sponsors (73% Nett satisfied; 6% Nett dissatisfied; 2017 74% and 5%; Table 43). Product manufacturer (66% and 10%; 2017 64% and 5%) and Regulatory affairs consultant groups (70% and 13%; 2017 76% and 5%) also show relatively strong outcomes. Despite these continued positive ratings, it is notable that for both the manufacturer and consultant groups the level of satisfaction has fallen slightly and dissatisfaction with the site appears to be growing, with the proportion of respondents showing dissatisfaction doubling or more since 2017 in both groupings.

Within the health professional group, satisfaction shows large discrepancies across groups and across years. The small number of respondents within these sub groups makes interpretation unreliable.

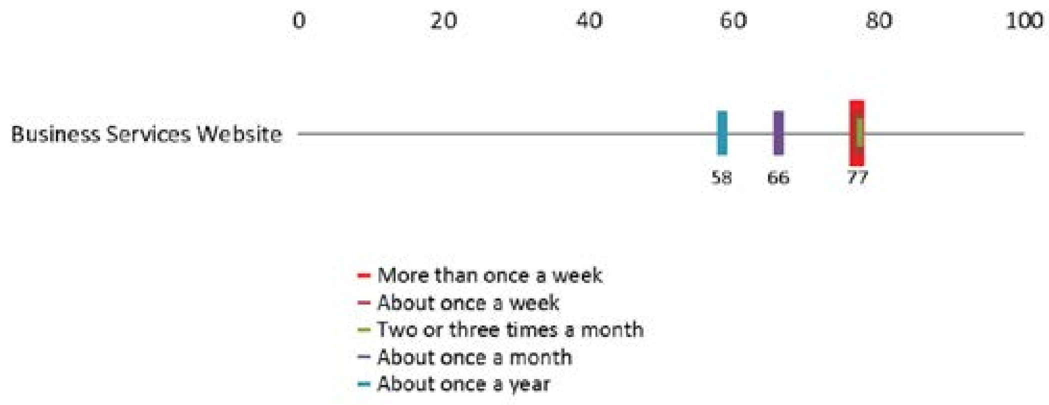
Table 43: TGA business services website – Overall satisfaction by stakeholder category, Industry and Health professionals (%)

How satisfied are you with the TGA Business Services website?

Category	Nett dissatisfied	Neither	Nett satisfied	% change (2017) Nett Sat	N
Medical products industry	8	21	71	+2	1190
Health professional	18	30	52	-3	101
Retailer	13	27	60	-11	45
Government	11	37	53	+8	38
Academic	29	18	53	+2	49
Other	11	23	66	+3	203
Medical products industry					
Product sponsor	6	20	73	-1	768
Product manufacturer	10	24	66	-8	279
Regulatory affairs consultant	13	17	70	-6	92
Industry association representative	25	13	63	+20	8
Other	13	20	68	0	40
Health professional					
Pharmacist	14	29	57	-8	14
Medical practitioner	25	58	17	-14	12
Nurse	38	25	38	-26	8
Compl healthcare practitioner	5	24	71	+24	21
Dental practitioner	0	20	80	+40	5
Other health professional	22	27	51	-10	41

For the business services site, the impact of familiarity with the site upon Nett satisfaction is strong (Figure 59). This effect occurs where use of the site is least frequent, with those in the once a year (58%) and once a month (66%) categories showing lower Nett satisfaction. Beyond this threshold of use, those who access the site more frequently show a consistent level of satisfaction (around 77%).

Figure 59: TGA business services website – Satisfaction by frequency of use (%)



More than once a week: N=331; About once a week: N=132; 2-3 times a week: N=172; About once a month: N=476; About once a year: N=518.

An opportunity to provide comments and feedback on the Business services website elicited a range of comments. Whilst most comments focussed on suggestions for improvements, it is important to highlight that a minority of comments highlighted that the site generally performs its function and operates to meet the needs of users. Most commonly these users highlight satisfaction with the site and point to the ease of use and ease of navigation as areas of satisfaction. However, even amongst this group it is important to highlight that there are commonly suggestions for improvements identified.

Feedback focussing on issues that could be improved highlights a range of issues that are generally in line with feedback identified across previous years of the survey. This includes a focus upon ensuring that the site is intuitive, performs as expected, provides a logical structure and easy navigation features, as well as general operation and content of the site. Ensuring the site is up to date and provides users with complete and timely information is also important. Where there is dissatisfaction, survey participants also often identified frustrations with updating information, account access issues, logon and password issues, the frequency of password resets, specific navigation issues and a lack of intuitive function.

TGA activities – Information sessions, Consultative processes and Events

Involvement in TGA activities

A total of 692 participants in the survey highlighted involvement in activities conducted by the TGA in the last 12 months (Table 44 and Figure 60). This represents around 37% of respondents to the question. The most common participation was in the form of a Consultation process (414), Information session (368) or Webinar (301). While the most common response amongst those who have participated is to select a single form of participation, many of those who identified participation in the identified events highlighted more than one activity, with an average of 2.1 selections (Table 45).

Table 44: 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)	414
TGA exhibition/booth (e.g. as a visitor at a conference)	172
Information session	368
Webinars	301
Workshops	227
No - I have not been involved in any of these activities	1164

Figure 60: Involvement in TGA activities (N)

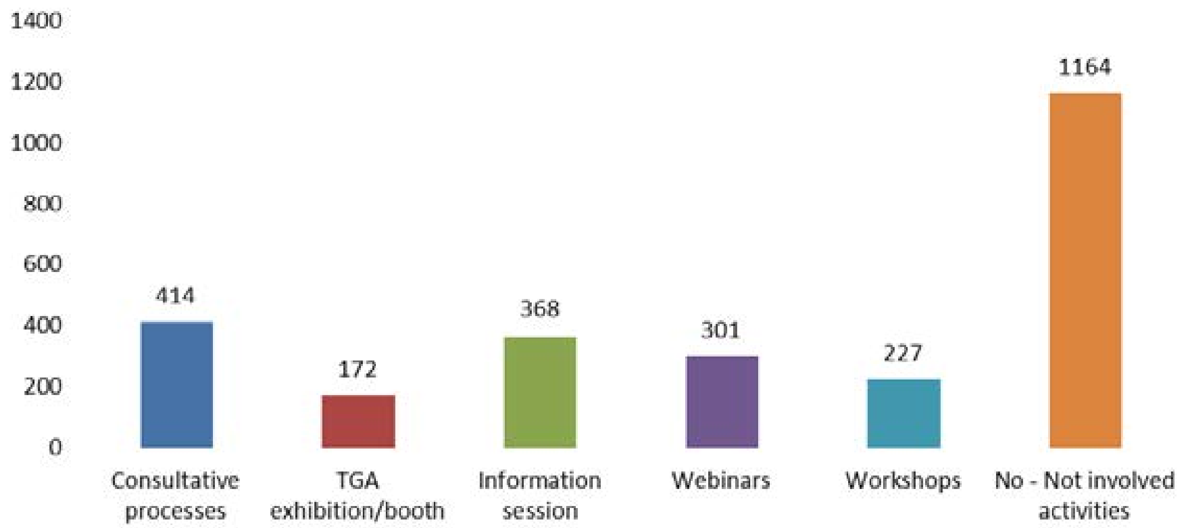


Table 45: Involvement in TGA activities – Number of activities

Number of activity selections	N
1	280
2	175
3	128
4	77
5	32
No - I have not been involved in any of these activities	1164
Total answering	1856
Average (excluding not involved)	**2.1**

Activities

A range of specific participation in consultations and events is identified. Involvement levels identified are shown in Tables 46 and 47.

Table 46: Participation – Consultations (N)

Which consultations were you involved with during the last 12 months?

Consultation	N
Therapeutic Goods Advertising Code	127
Proposal to change the current good manufacturing practice (GMP) fees and charges	121
Therapeutic Goods Amendment (2017 Measures No. 1) Bill 2017 and Therapeutic Goods (Charges) Amendment Bill 2017	112
Draft therapeutic goods advertising code 2018 and associated guidelines	105
Advertising therapeutic goods to the public	88
Consultations on adoption of European Union guidelines in Australia	79
Management and communication of medicines shortages	64
Proposed amendments to the Poisons Standard being referred to the June 2018 meetings of the ACCS, ACMS and Joint ACCS/ACMS	55
Proposed amendments to the Poisons Standard being referred to the June 2018 meetings of the ACCS, ACMS and Joint ACCS/ACMS	55
Business process improvements supporting complementary medicines assessment pathways	44

Consultation	N
Alignment with European medical device regulatory framework- Up-classification of surgical mesh & Patient implant cards	43
Options for the implementation of a claimer for efficacy assessed non-prescription medicines	39
Scheduling delegate's interim decisions & invitations for further comment	38
Nomenclature of Biological Medicines	33
Proposed regulatory changes related to personalised and 3D printed medical devices	33
Remaking of TGO No. 77 - Microbiological Standards for Medicines	31
Prescription strong (Schedule 8) opioid use and misuse in Australia - options for a regulatory response	27
Discontinuing pre-market evaluation of Herbal Component Names (HCNs)	26
Revision of TGO 75 Standard for haematopoietic progenitor cells derived from cord blood	13
Sedating antihistamines: proposed additional advisory statements for medicines	10
Miconazole and fluconazole: proposed advisory statements for medicines	7
Other, please specify	58

Table 47: Participation – Events (N)

Which event(s) did you attend in the last 12 months?

Event	N
Webinar: Update on the Advertising Therapeutic Goods Reforms - 23 May 2018	148
Webinar: The new Code - Where are we at, 12 Jun 2018	70
Information session: The new Code - Where are we at? - Sydney, 13 Jun 2018	64
TGA booth: RACP - Sydney, 14 - 16 May 2017	10
Other	135

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

Events

- Risk management.
- Auditing.
- 3D printing.
- ARCS sessions and webinars.
- NHMRC webinar.
- BAA conference.
- CMA reform information session.
- Fees and charges information sessions.
- Complementary medicines reform workshop.
- GMP forum.
- Pharmacovigilance inspections.
- FOI information seminar.
- External evaluator panel information session.
- Inspection program workshop.
- ISCT meetings.
- MMDR information session.
- CORS pathway.
- Stem cells registration.
- Permitted indications workshop.
- Sponsor information day.
- TGA information day.
- Webinars – general.

Consultations

- Black triangle scheme.
- Adverse events reporting.
- Advertising compliance.
- Australian clinical trial handbook.
- Autologous cell therapies.
- Classification of Leukaemia and Lymphoma Products (IVD).
- Communication plan for patients and health professionals on priority and provisionally registered medicines.

- Comparable overseas regulators - medical devices; enhancing sanctions and penalties in the *Therapeutic Goods Act 1989*; Options for the future regulation of 'low risk'.
- Complementary medicines reforms.
- Biologicals.
- Genetically modified organism consultation.
- Ibuprofen and Codeine rescheduling.
- Labelling.
- National statement updates.
- NMBA.
- Permitted indications.
- Pharmacovigilance guidelines.
- Registration and fees.
- Review of device to replace existing device.
- Risk management plans.
- SAS.
- Australian Clinical Trial Handbook.
- Neuromuscular blocking agents.

Satisfaction with activities

Satisfaction across a range of statements relating to events highlights generally strong levels of satisfaction across Consultations booths, Information sessions and Webinars (Table 48). Amongst those who have participated in consultations, there is a high level of satisfaction with the information provided (Nett satisfaction 75%). For the remaining measures, two thirds or more express satisfaction with the procedures, simplicity of the process, ability to provide input and feedback and overall satisfaction with consultations. Follow up on consultation processes is rated less favourably, with just over half of the participating group highlighting satisfaction. Despite the overall strong levels of satisfaction, opportunities to minimise the level of dissatisfaction are identified, with more than 10% of people highlighting dissatisfaction on the overall satisfaction measure and the ability to follow up on consultation processes. Small sample sizes make interpretation of further breakdowns by stakeholder category difficult; however, a general trend toward lower levels of satisfaction amongst Health professionals compared to those in the Medical products industry is noted.

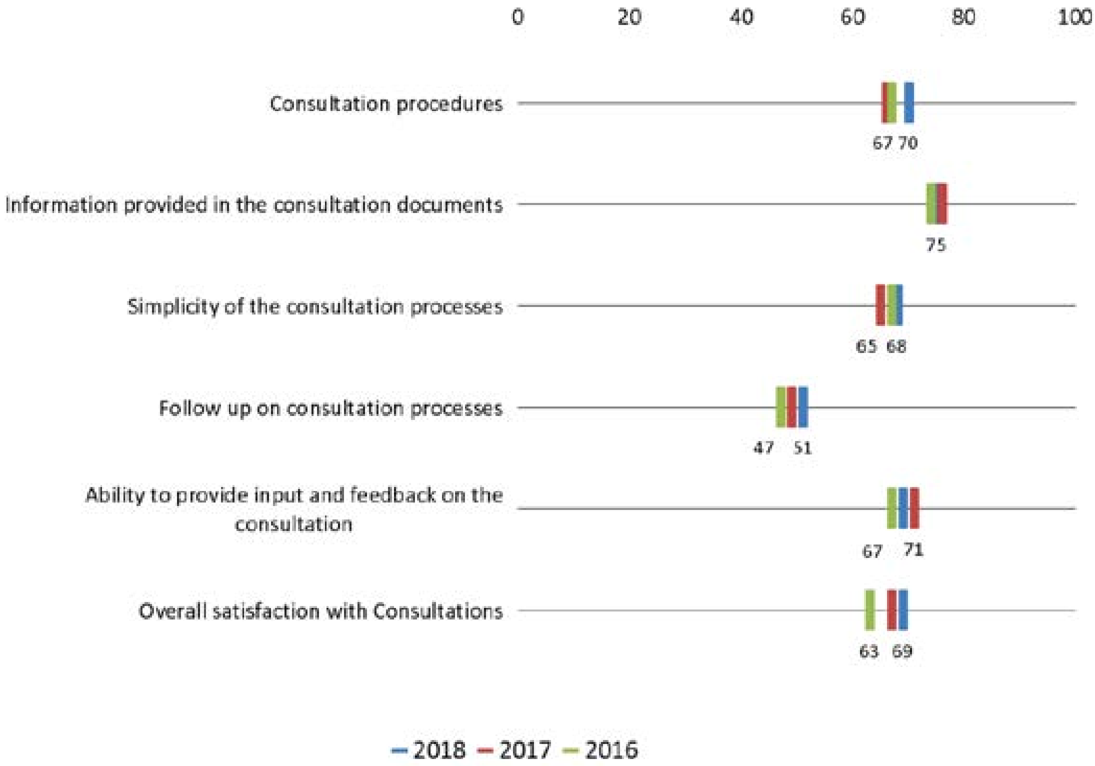
Table 48: Satisfaction with Events (%)

How satisfied were you with the following features of the event(s) you attended?

Statement	Nett dissatisfied	Neither	Nett satisfied	N
Consultations				
Consultation procedures	9.1	21.2	69.6	372
Information provided in the consultation documents	7.2	17.4	75.4	374
Simplicity of the consultation processes	8.1	23.8	68.1	370
Follow up on consultation processes	13.6	35.2	51.2	369
Ability to provide input and feedback on the consultation	8.6	22.6	68.8	372
Overall satisfaction with Consultations	12.6	18.6	68.9	350
TGA booth				
Information provided in the TGA booth	2.8	21.3	75.9	108
Quality of the TGA booth	3.7	16.7	79.6	108
Overall satisfaction with TGA booths	2.8	15.1	82.1	106
Information sessions				
Information provided during the information session	8.1	16.1	75.8	62
Quality of the Information session	6.6	23.0	70.5	61
Overall satisfaction with Information sessions	6.7	15.0	78.3	60
Workshops				
Quality of the workshop	1.7	0.0	98.3	59
Overall satisfaction with the workshop	1.8	3.6	94.5	55
Webinars				
Information provided during the webinar	9.3	19.7	71.0	183
Overall satisfaction with the webinar	9.8	19.7	70.5	183

Across years, ratings of consultations show strong consistency. Nett satisfaction scores, shown in Figure 61 below, generally show a trend toward slight increases in Nett satisfaction since 2016. Encouragingly, the overall satisfaction with consultations has increased from 63% in 2016 to 69% in the 2018 survey.

Figure 61: Consultations – Nett satisfaction – 2016-2018 (%)



N=147-394

For those who have experienced TGA booths, the feedback is generally positive, with good levels of Nett satisfaction observed across Information provided (76%), Quality (80%) and Overall satisfaction (82%) measures (Table 48). These outcomes are accompanied by very low dissatisfaction levels of 4% or lower. Information sessions are viewed slightly less favourably; however, the overall performance in relation to these events remains strong, with between 71% and 78% Nett satisfaction across the three measures identified and generally low levels of dissatisfaction (under 10% on all measures).

Ratings on workshop events are very positive. Almost all participants express satisfaction with the quality of the workshop. Overall satisfaction is similarly high. On both measures, only one of the identified participants in workshops highlighted dissatisfaction with the event they attended. The in-person context of the workshop may help to explain the less favourable outcomes in relation to webinars events, which showed less favourable (although still generally positive) outcomes. Around seven in ten webinar participants expressed satisfaction with both the information provided and the overall event, with around 1 in 10 dissatisfied. Inviting direct and immediate feedback on these events may assist in refining the experience of participants over time.

Due to the very small numbers of respondents, comparison of outcomes across stakeholder categories in relation to booths, information sessions, workshops and webinars is not reliable.

Recent reforms by the TGA

The 2018 survey included an additional module to gauge interest in and perceptions of recent reforms.

Reforms – Stakeholder interest

Participants were asked to nominate those reform areas that are of interest to them. A total of 76% of responses indicated some level of interest in one or more reform areas (Figure 62 and Table 51). Interest in multiple reform areas is common, with an average of 2.2 selections amongst those who identified some interest and a substantial number of people indicating interest in 3 or more reform areas (Table 49). The highest overall levels of interest amongst stakeholder groups include Product sponsors, Regulatory affairs consultants, Industry association representatives, Pharmacists, Medical practitioners and Complementary healthcare practitioners. Most notably, (the small numbers of) Pharmacists and Regulatory affairs consultants express high levels of interest across the range of reform areas.

The reform area that generates the highest level of interest is 'Establishing a priority review pathway for medicines and medical devices' which is of interest to 43% of the stakeholder group who responded. This area is almost twice as likely to be of interest than other reform areas and is the most commonly identified reform amongst all major stakeholder groups (Table 50).

A range of other reform areas generate interest amongst the stakeholder groups, most notably the List of permitted indications for listed medicine (498 selections), Provisional approved pathway for certain medicines (458) and New Category C notifications for the Special Access Scheme (SAS) (391).

Figure 62: Interest in recent TGA reforms (%)

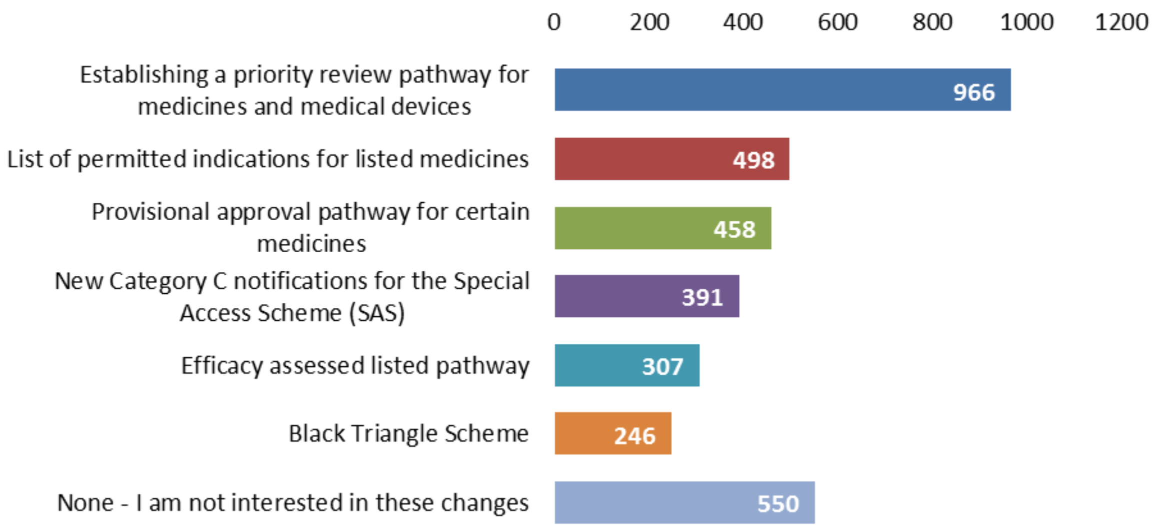


Table 49: Interest in recent TGA reforms – number of selections (%)

Number of selections	N
1	543
s2	312
3	214
4	136
5	45
6	48
None	550
Total	1848

While the Priority review pathway is the most commonly selected area of interest across the broad stakeholder groupings, there are some notable patterns. These include high levels of interest in:

- Provisional approval pathway for certain medicines among Regulatory affairs consultants, Pharmacists and Medical practitioners;
- New Category C notifications for the SAS from Pharmacists, Academics, and regulatory affairs consultants;
- Black triangle scheme reforms from Regulatory affairs consultants and Pharmacists;
- Efficacy assessed listed pathway among Regulatory affairs consultants, Industry association representatives, Pharmacists and Complementary healthcare practitioners; and
- Permitted indications for listed medicines among Pharmacists, Complementary healthcare practitioners, Regulatory affairs consultants and Industry association representatives.

Table 50: Interest in recent TGA reforms – By stakeholder group (%)

The TGA has recently made some changes to the regulation of medicines and medical devices. Please identify the changes that interest you.

Stakeholder group	Priority review path	Prov approv path	New Cat C	Black Tri Scheme	Efficacy asses listed path	Permit indic'ns list	None	N
Total	42.9	20.3	17.4	10.9	13.6	22.1	24.4	2252
Medical prod ind	50.0	21.7	18.7	12.9	14.2	20.6	21.4	1531
Health pro	30.6	22.2	18.1	6.5	13.4	25.5	21.8	216
Retailer	23.3	5.5	4.1	1.4	8.2	21.9	38.4	73
Government	25.4	13.4	14.9	7.5	7.5	13.4	32.8	67
Academic	36.5	20.6	27.0	9.5	12.7	30.2	36.5	63
Media	0.0	0.0	0.0	0.0	0.0	50.0	50.0	2
Other	26.1	17.2	12.0	7.2	13.7	27.8	34.0	291
Medical products industry								
Product sponsor	55.3	24.6	20.7	15.7	14.3	20.5	18.9	932
Product manufacturer	37.7	10.9	14.0	5.0	10.7	16.4	29.1	422
Reg affairs consult	65.7	46.7	23.8	24.8	31.4	36.2	9.5	105
Ind assoc'n rep	18.2	9.1	18.2	18.2	27.3	36.4	9.1	11
Other	6.9	2.4	2.4	1.0	0.7	3.4	5.8	291
Health professional								
Pharmacist	39.4	45.5	39.4	21.2	27.3	45.5	0.0	33
Medical practitioner	50.0	40.9	27.3	9.1	9.1	27.3	6.8	44
Nurse	8.3	8.3	8.3	0.0	4.2	4.2	37.5	24
Comp healthcare pract	23.1	12.8	0.0	0.0	33.3	53.8	15.4	39
Dental practitioner	11.1	11.1	22.2	0.0	0.0	11.1	33.3	9
Other	27.3	9.1	13.6	3.0	1.5	6.1	39.4	66

Perceptions of reforms

Perceptions of reforms highlight a strong level of neutral responses across the areas tested, with the neither responses the most selected answer across each of the statements presented (Table 51). Generally the neutral responses are more likely to be associated with Government and Academic stakeholders. In addition to this pattern, on all measures the level of positive response outweighed those who were not positive about the reforms.

Forty percent of all survey participants feel that the reforms are beneficial to them or their business compared to 8% who disagree (Table 51). Over one in three feel that their business is prepared for the changes compared to 9% who feel this is not the case (and 55% who selected the neutral Neither response). In terms of information provision regarding the reforms, 37% agree that the information provided was adequate. A substantial proportion (16%) feel that this is not the case and just under half Neither agree nor disagree on this statement.

There is substantial agreement on the statement focusing on adverse impacts of the reforms (18%), with those who disagree that there has been an adverse impact slightly higher at 23% (59% Neither agree nor disagree with this statement).

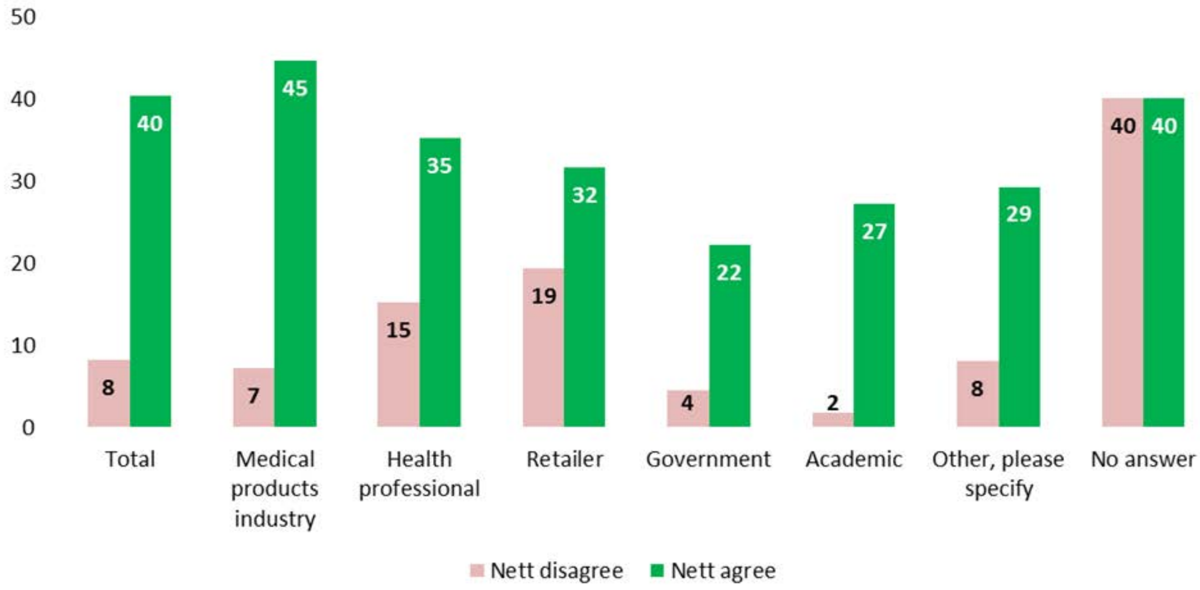
Table 51: Perceptions of reforms (%)

Please indicate your level of agreement with the following statements:

Statement	Nett disagree	Neither	Nett agree	N
The reforms are beneficial to my business/myself	8.2	51.5	40.3	1828
I am/my business is adversely impacted by the reforms	22.6	59.1	18.3	1809
I am/my business was prepared for the regulatory changes	8.6	55.4	36.0	1823
I received adequate information regarding the reforms	15.7	47.0	37.3	1825

Medical products industry respondents are most likely to highlight agreement in relation to the statement that the reforms are beneficial (Figure 63). Amongst this group, Product sponsors (48% Nett agree), Industry association representatives (63%) and Regulatory affairs consultants (53%) all show high levels of agreement with the statement and low levels of disagreement (Table 53).

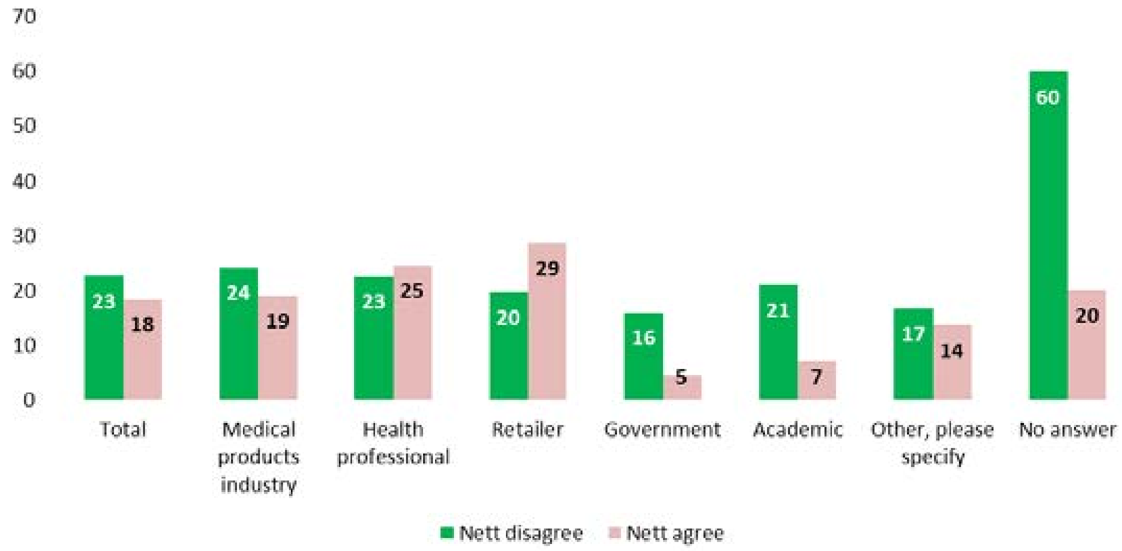
Figure 63: Perceptions of reforms – The reforms are beneficial to my business/myself – by stakeholder group (%)



Med prod ind: N=1,273; Health pro: N=151; Retailer: N=57; Gov: N=45; Academic: N=59; Media: N=2; Other: N=263.

Retailers (29%) and to a lesser extent Health professionals (25%) appear slightly more likely to agree that the reforms will have an adverse impact. These two groups show agreement levels on this question at slightly higher levels than disagreement. Within the Health professionals group, Complementary health practitioners (57% Nett agree), Pharmacists (29%) and Dental practitioners (33%) all commonly highlight that they have experienced adverse impact of the reforms (Table 52).

Figure 64: Perceptions of reforms – I am/my business is adversely impacted by the reforms – by stakeholder group (%)



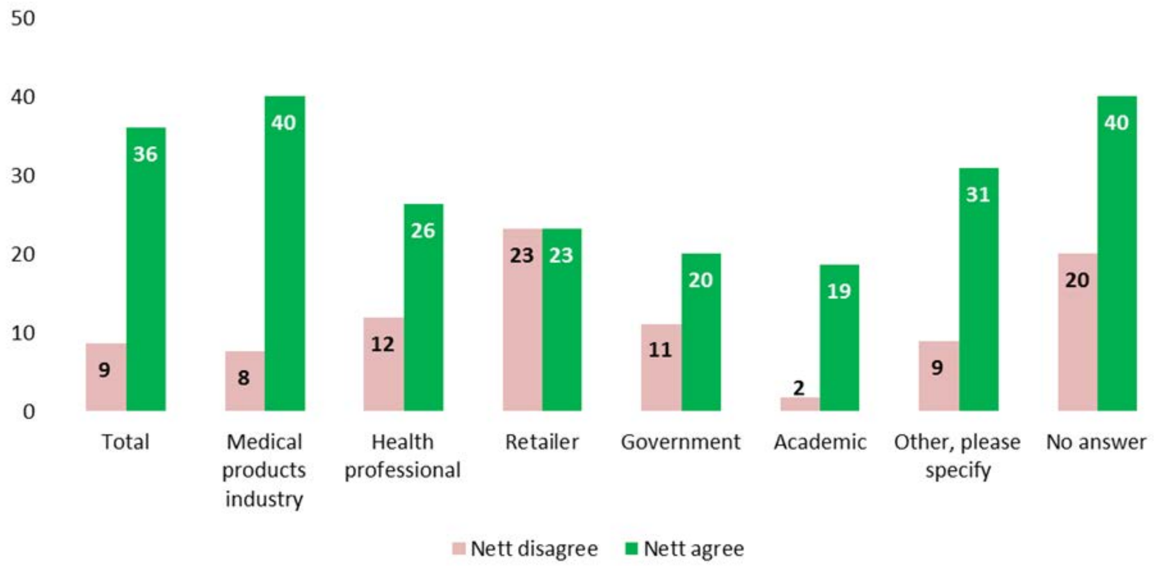
Med prod ind: N=1,259; Health pro: N=151; Retailer: N=56; Gov: N=44; Academic: N=57; Media: N=2; Other: N=235.

In terms of preparation for the reforms, those in the Medical products industry show the highest levels of agreement (40%) coupled with low disagreement (8%; Figure 65). There is generally strong consistency in responses across the range of industry stakeholder groups, although notably Regulatory affairs consultants are most likely to agree that they are prepared for the changes (Table 52).

Health professionals also appear to more commonly than not feel prepared; however, it is notable that almost one in three Complementary healthcare practitioners disagree that they are prepared (Table 52). Retailers also show a relatively high level of disagreement that they are prepared. These outcomes are consistent with those highlighted in relation to agreement levels relating to whether stakeholders received adequate information about the reforms (Figure 66 and Table 52). In response to this question, Retailers (Nett disagree 23%) and Complementary healthcare providers (41%), along with Medical Practitioners (27%), show a high likelihood to disagree that they received adequate information.

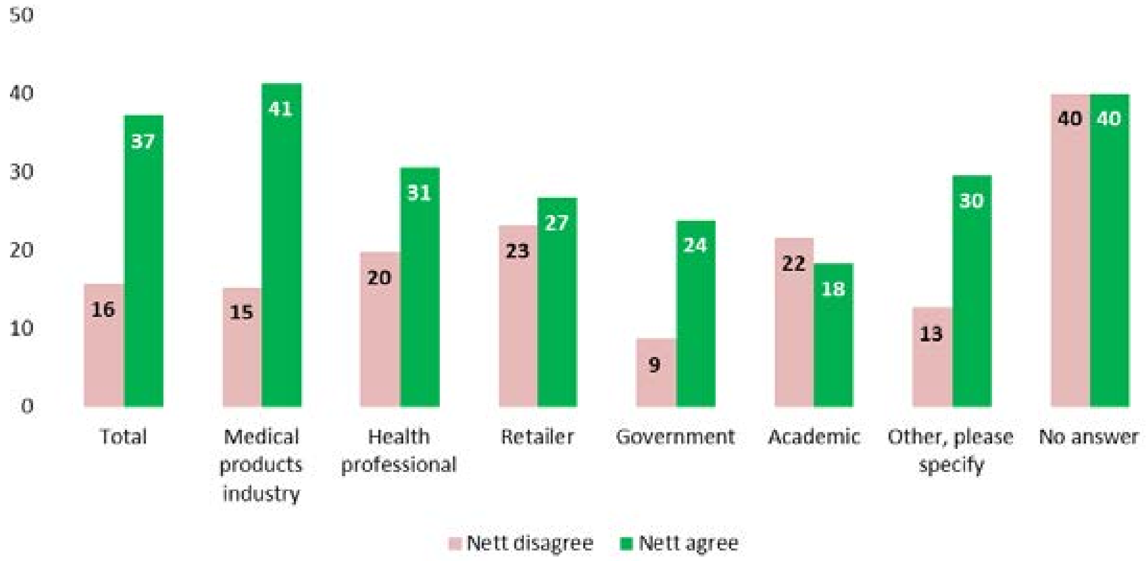
The outcomes here highlight potential opportunities for further education and targeted information to Retailer, Complementary healthcare and Medical practitioner groups.

Figure 65: Perceptions of reforms – I am/my business was prepared for the regulatory changes – by stakeholder group (%)



Med prod ind: N=1,268; Health pro: N=152; Retailer: N=56; Gov: N=45; Academic: N=59; Media: N=2; Other: N=236.

Figure 66: Perceptions of reforms – I received adequate information regarding the reforms – by stakeholder group (%)



Med prod ind: N=1,273; Health pro: N=147; Retailer: N=56; Gov: N=46; Academic: N=60; Media: N=2; Other: N=236.

Table 52: Perceptions of reforms by Stakeholder group (%)

Please indicate your level of agreement with the following statements:

	Reforms are beneficial		Adverse impact		Prepared for change		Received adequate info	
Stakeholder	**Nett disagree**	**Nett agree**	**Nett disagree**	**Nett agree**	**Nett disagree**	**Nett agree**	**Nett disagree**	**Nett agree**
Medical products industry								
Product sponsor	7	48	25	20	8	41	16	43
Product manufacturer	8	36	20	17	8	35	15	33
Reg affairs consult	5	53	32	14	2	58	13	54
Ind assoc'n rep	13	63	13	50	25	38	13	63
Other	2	38	24	18	2	29	9	38
Health professionals								
Pharmacist	5	67	23	29	0	38	0	57
Medical practitioner	6	47	19	9	16	16	27	27
Nurse	0	23	44	15	0	23	15	23
Compl health pract	47	23	8	57	29	35	41	21
Dental practitioner	17	50	13	33	17	50	17	50
Other	10	21	33	15	6	21	13	28

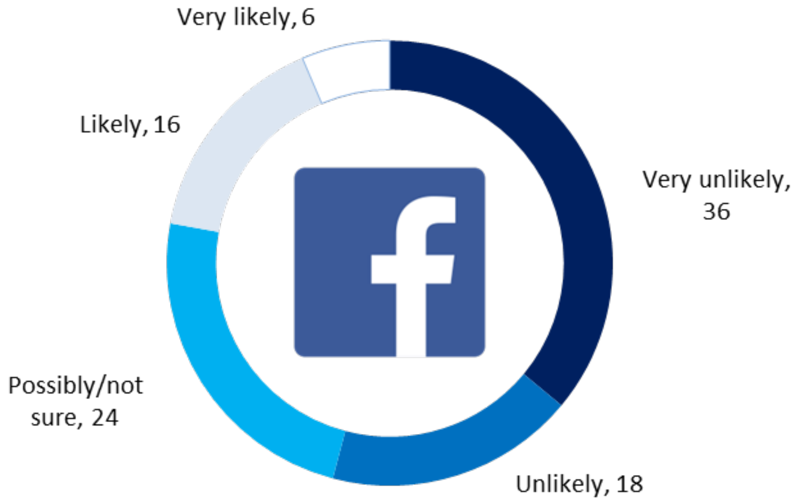
Sponsor: N=788-797; Manufacturer: N=326-330; Reg Affairs Con: N=88-91; Ind Assoc Rep: N=8; Other: N=45.

Pharmacist: N=21; Med prac: N=30-32; Nurse: N=13; Comp health: N=29-31; Dental: N=6; Other: N=47-48.

Engaging with the TGA through Facebook

Gauging the potential usefulness of Facebook as a channel for communication of TGA messaging and information highlighted a mixed response (Figure 67). Most commonly, responses show that stakeholders would be either Very unlikely (36%) or Unlikely (18%) to find this service useful, with substantially fewer responses highlighting they would be either Likely (16%) or Very likely (6%) to find this service useful. Retailers (38% Nett likely), Pharmacists (35%) and Complementary healthcare practitioners (66%) all show relatively high likelihood of finding Facebook communications useful (Table 53).

Figure 67: Facebook communication – Useful likelihood (%)



N=1857

Table 53: Facebook communication – Useful Likelihood

The TGA is exploring the option of creating a Facebook page to communicate important messages. How likely is it that you would find this service useful?

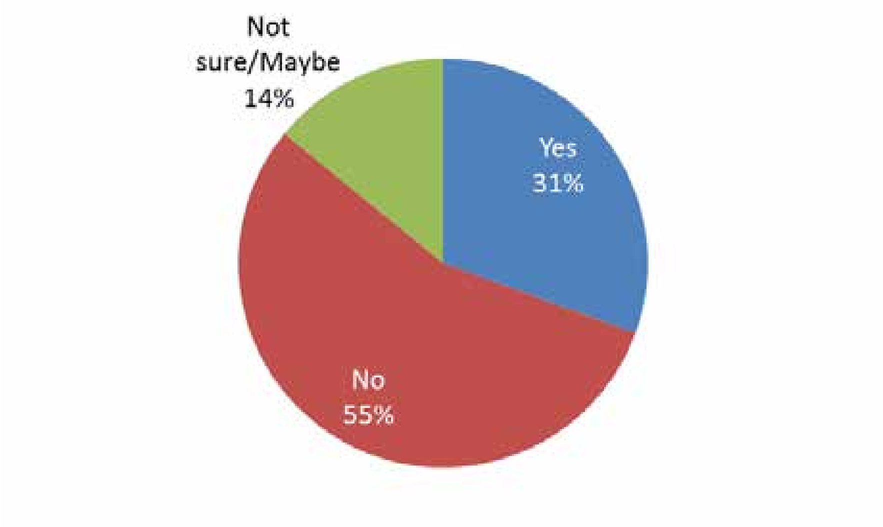
Facebook engagement (%)

Stakeholder group	Nett unlikely	Possibly	Nett likely	N
Medical products industry	55	24	21	1293
Health professional	55	17	28	155
Retailer	43	20	38	56
Government	62	28	11	47
Academic	48	32	20	60
Media	0	0	100	1
Other	53	25	22	240
Medical products industry				
Product sponsor	55	25	20	810
Product manufacturer	56	20	24	335
Reg affairs consult	52	27	21	92
Ind assoc'n rep	38	25	38	8
Other	51	27	22	45
Health professionals				
Pharmacist	35	30	35	20
Medical practitioner	84	6	9	32
Nurse	64	7	29	14
Comp healthcare practitioner	21	14	66	29
Dental practitioner	50	17	33	6
Other	60	23	17	53

SME Assist

Businesses in the Medical products industry with fewer than 200 employees were asked about their awareness and experience with the SME assist portal, which contains information and education products for small and medium sized enterprises. Less than half of those within this grouping have heard of SME assist (Figure 68). Awareness appears higher amongst those with 20-199 employees (40%) when compared to smaller organisations with 1-19 employees (24%).

Figure 68: SME assist – awareness (%)

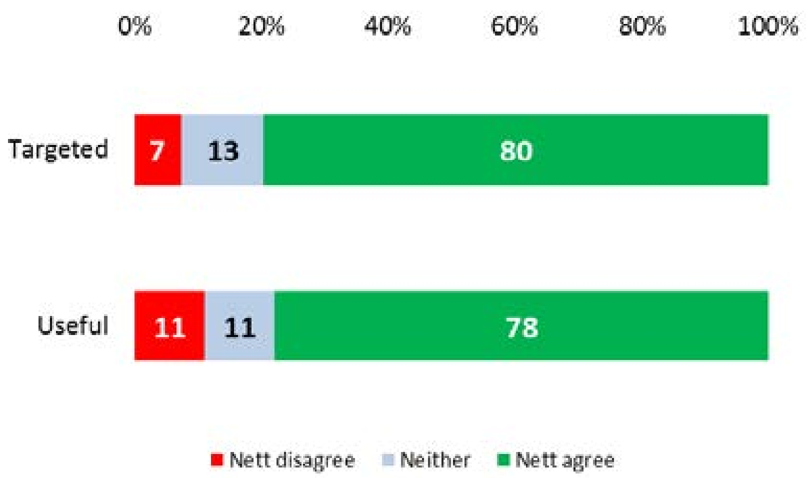


N=1,021

Just under four in ten (Yes – accessed: 38%; No – not accessed: 62%) of those who have heard of SME assist have accessed the resource. In contrast to overall awareness, the propensity to have accessed the site appears slightly higher amongst those who employ smaller numbers, with 41% of those with 1-19 employees reporting access compared to 36% of larger organisations employing 20-199 employees.

Of those who have used SME assist, a large majority agree that the site is Targeted (Nett agreement 80%) and Useful (78% Nett agreement) (Figure 69). Only 7% disagree that SME assist is targeted while 11% disagree that it is useful. Ratings are similar across employee numbers, with organisations in the 1-19 employees category and those in the 20-199 category showing a high propensity to agree that the site is useful (1-19: 78% Nett agreement; 20-199 77%) and targeted (1-19: 80%; 20-199; 75%).

Figure 69: SME assist – Targeted and Useful (% Agreement)



N=110-111

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Version	Description of change	Author	Effective date
V1.0	Original publication	Therapeutic Goods Administration	December2018

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