Australian Government

Department of Health
Therapeutic Goods Administration

TGA stakeholder survey 2020

Version 1.1, February 2021

TGA Health Safety Regulation

Contents

Summary

The Therapeutic Goods Administration (TGA) conducts an annual stakeholder survey to help report on our key performance indicators and make ongoing improvements to the way we work with our stakeholders. The 2020 survey covered topics from previous surveys while incorporating new questions in selected areas, such as advertising and medicine shortages. The 2020 survey found that around 1 in 2 Australian consumers had heard of the TGA. Of those who were familiar with the TGA, the majority of consumer, health professional and medical products industry respondents trusted the TGA to act ethically and with integrity. The majority also believed that the TGA gets the balance right between access to therapeutic goods and safety for consumers. Respondents were satisfied with their interactions with TGA staff and systems, although they highlighted various areas for improvement, including the user experience on our website. In a year marked by the pandemic, the majority of medical products industry respondents agreed that the TGA had responded effectively to COVID-19, though consumers in particular appeared to be uncertain or unaware of what our response entailed. Overall, the 2020 survey results highlight an opportunity to build awareness of the TGA and our role in the Australian community.

How to read this report

The structure of the report

This report summarises key findings from the 2020 TGA stakeholder survey, focussing on three of our key stakeholder groups: consumers, health professionals and the medical products industry. We begin with an outline of our approach to the survey, including an explanation of the distinction between what we call ‘opt-in respondents’—those who completed the survey by email invitation or web link—and ‘panel respondents’—those who we recruited through a market research provider. A narrative overview of the results is provided before presenting results tables for individual survey items.

Interpreting percentages and tables

Survey questions in the opt-in survey were optional, which means some survey respondents did not answer every question. Except where stated otherwise, each percentage included in this report is the percentage of respondents who answered the relevant question (not the percentage of total respondents to the survey).

Results tables for each stakeholder group are presented in the latter half of this report. Abbreviations used in the results tables are defined in Appendix 1. All percentages are rounded to the nearest whole number. Any discrepancy between a total and the sum of its components is due to rounding.

If you have any questions about the survey, please email tga.education@tga.gov.au

The survey approach

The TGA is part of the Australian Government Department of Health. The TGA developed the 2020 stakeholder survey in conjunction with the Department's Market Research Unit.

Survey questions

The 2020 stakeholder survey was developed to seek feedback on various aspects of the TGA's role and how key stakeholder groups perceive this role. This feedback helps us make ongoing improvements to the way we work with our stakeholders. The survey was also designed to contribute to the *TGA Regulator Performance Framework Self Assessment Report, July 2019 to June 2020*. This annual self-assessment report evaluates our work against key performance indicators in the Australian Government's Regulator Performance Framework. In particular, we use questions from the stakeholder survey to help measure key performance indicator 6.1: 'Regulators establish cooperative and collaborative relationships with stakeholders to promote trust and improve the efficiency and effectiveness of the regulatory framework'.

Although many questions in the survey were intended for respondents who were aware of the TGA, we also included some questions which did not depend on any awareness of our role. These questions related to stakeholder information interests and general perceptions of medicines and medical devices. As noted above, questions in the opt-in survey were optional.

Sampling methods

Stakeholders were invited to complete the 2020 survey using a combination of methods. This report refers to survey respondents as either 'opt-in respondents' or 'panel respondents' depending on the sampling methods involved.

Opt-in respondents

The opt-in survey was open between 27 July and 21 August 2020, with respondents invited to complete it through an email invitation or a web link.

We distributed individualised email invitations to active users of TGA Business Services, which is an online system for functions such as electronic payments and electronic lodgement of applications for entry of products onto the Australian Register of Therapeutic Goods. To encourage participation, we issued non-respondents with up to three reminder emails during the survey period.

A total of 26,485 email invitations were distributed. Of these, 5,907 were invalid because they failed to deliver. A total of 1,951 people completed one or more survey questions after receiving an email invitation, making the response rate for email invitations 7% (or 9% based upon the known valid sample of 20,578).

Email invitations to TGA Business Services are mainly directed towards stakeholders in the medical products industry. As a result, we also published an invitation to the survey on the TGA website and worked with a range of consumer representative organisations to distribute the survey in their newsletters. A further 248 people completed one or more questions through the web link, increasing the total number of opt-in respondents to 2,199. The total number of opt-in respondents in 2020 was less than in 2019 (2,887 opt-in respondents).

Of the total 2,199 opt-in respondents, most were from the medical products industry (1,547), followed by health professionals (158) and consumers (116). Various other groups made up the remainder of the opt-in sample, including retailers (65), university researchers/academics (59), government (36), consumer representatives/advocates (23) and media (2).

Panel respondents

Previous surveys have highlighted that it can be harder to reach consumer and health professional respondents than respondents from the medical products industry. For this reason, market research provider Qualtrics LLC was engaged to access participants from the panels of survey respondents Qualtrics maintains. Consistent with the 2019 survey, this included a sample of consumers who were broadly representative of the Australian population and a sample of health professionals. Whereas in 2019 we surveyed general practitioners, in 2020, we surveyed pharmacists.

The panel consumer sample was composed of 1,037 Australians aged 18 and above. The sample was weighted to achieve broad representation across age, gender, and state-based location. Full demographic details are presented in the results tables section of this report. Fieldwork for the panel consumer survey commenced on 31 July 2020 and was completed on 5 August 2020. For pharmacists, Qualtrics provided access to a validated sample of 117 current pharmacists in Australia. Fieldwork for the panel pharmacist survey was conducted between 31 July and 7 August 2020.

Overview of results

This section of the report begins with a question-by-question summary of results for three groups: panel consumers, panel pharmacists and opt-in medical products industry respondents. We conclude the section with a discussion of additional insights from opt-in consumers and opt-in health professionals.

Awareness of the TGA and understanding of our regulatory scope

Consumers, health professionals and other non-industry stakeholder groups were asked whether they had heard of the TGA before participating in the survey. Around 1 in 2 panel consumers were aware of the TGA (52%, 539 of 1,037). This figure provides an estimate of consumer awareness in the Australian population. Awareness among panel pharmacists was greater than panel consumers, with 100% of panel pharmacists stating they were aware of the TGA.

In addition to asking non-industry respondents if they were aware of the TGA, respondents were also asked what they think the TGA regulates. Respondents selected options from a list consisting of five correct options, such as 'medicines prescribed by a doctor' and 'advertising of medicines and medical devices', and six incorrect options, such as 'foods', 'health professionals' and 'veterinary medicines'. Both panel consumers and panel pharmacists selected correct options more frequently than incorrect options (Table 7 and Table 35). However, 59% of panel consumers (608 of 1037) and 74% of panel pharmacists (86 of 117) selected at least one incorrect option. Among panel consumers, the most common incorrect responses were 'allied health professionals' (14%, 143 of 1037) and 'medical procedures' (14%, 140 of 1037). Among panel pharmacists, the most common incorrect responses were 'veterinary medicines' (39%, 46 of 117) and 'medical procedures' (17%, 20 of 117).

Overall, these results highlight an opportunity to build awareness of the TGA in the Australian community. Although it would be unreasonable to expect all stakeholders to possess detailed knowledge of the TGA's regulatory remit, there is also an opportunity to increase stakeholder understanding of our role, particularly among pharmacists. For readers who wish to learn more about the scope of TGA regulation, our website includes information on what the TGA regulates and what the TGA does not regulate.

Getting the balance right

The TGA aims to strike a balance between safety for consumers and access to therapeutic goods. We asked respondents who were aware of the TGA to indicate whether they agree that 'the TGA gets the balance right between safety for consumers and access to products'.

A small percentage of panel consumers (5%, 25 of 539) and panel pharmacists (3%, 4 of 117) disagreed or strongly disagreed with the balance item. Nett disagreement was higher for opt-in medical products industry respondents (11%, 154 of 1,453). We would expect a level of disagreement with this item given the broad range of therapeutic goods the TGA regulates. Furthermore, respondents may disagree with this item because they see an imbalance with respect to too little access or too little safety (or potentially both in different contexts). Nevertheless, the majority of panel consumers (65%, 349 of 539), panel pharmacists (87%, 102 of 117), and opt-in medical products industry respondents (73%, 1060 of 1,453) agreed or strongly agreed that the TGA gets the balance right.

Trust

To measure trust in the TGA, respondents who were aware of the TGA were asked to indicate their level of agreement with the following statement: 'I trust the TGA to act ethically and with integrity'. The pattern of results for this item was similar to the balance item. The proportion of nett disagreement was low: 4% (24 of 539) for panel consumers, 3% (4 of 117) for panel pharmacists, and 5% (74 of 1456) for opt-in medical products industry respondents. The majority of panel consumers (76%, 412 of 539), panel pharmacists (93%, 109 of 117) and opt-in medical products industry respondents (88%, 1,275 of 1,456) agreed or strongly agreed that the TGA acts ethically and with integrity. Overall, these results demonstrate a high level of trust in the TGA among these groups.

Awareness of advertising regulations

The TGA regulates the advertising of therapeutic goods in Australia. Selected stakeholder groups, including industry and health professionals, were asked if they advertise therapeutic goods. Advertisers were then asked about their awareness of advertising rules for therapeutic goods and the potential consequences of breaking them.

Among opt-in medical products industry respondents, 38% of respondents (576 of 1,510) stated that they advertise or arrange the advertising of therapeutic goods. Of this group, 97% (549 of 566) stated they were aware of specific rules for advertising therapeutic goods in Australia. About the same percentage of opt-in medical products industry respondents (98%, 552 of 565) stated they were aware of potentially serious consequences for breaking these rules, such as fines and court action. Among panel pharmacists, 42% (49 of 117) stated they advertise or arrange the advertising of therapeutic goods. All of the pharmacists in this group (100%, 49 of 49) stated they were aware of advertising rules and the potential consequences for breaking them.

Overall, these results demonstrate a high level of awareness among opt-in medical product industry respondents and panel pharmacists. It is important to note, however, that as the medical products industry respondents were recruited through the TGA Business Services (TBS) portal, it is reasonable to expect that these respondents are already engaged with the regulatory system. These respondents had also self-selected to complete the survey, which may also indicate a higher level of engagement. As a result, awareness in the survey sample may not represent the broader population of existing or potential advertisers. Furthermore, high-level awareness of rules and consequences does not necessarily entail detailed knowledge of the regulatory requirements for specific circumstances.

Panel consumers were not asked specific questions about their awareness of advertising rules and the consequences for breaking them. However, responses to the question about 'what the TGA regulates' (see above) provide an indication of consumer awareness of advertising regulations. When selecting one or more options from a list of correct and incorrect options, 28% of panel consumers (292 of 1,037) correctly indicated that the TGA regulates the 'advertising of medicines and medical devices'. A further 23% (238 of 1,037) selected 'all of the above'. At least some responses to this question were likely to be guesses, especially given that only 52% of panel consumers (539 of 1,037) had heard of the TGA before participating in the survey. In this way, no more than 51% of panel consumers (530 of 1,037) were aware that the TGA regulates the advertising of therapeutic goods, which again highlights an opportunity to build awareness of our role in the Australian community.

Readers can learn more about the regulations for [advertising therapeutic goods]() on our website.

Enforcing the regulations

Two items were included in the survey, aimed at respondents who were already aware of the TGA, to measure stakeholder perceptions of our compliance and enforcement activities.

The first enforcement item related specifically to enforcing advertising regulations: 'The TGA takes strong action against illegal advertising of health products'. Nett disagreement for this statement was 5% for panel consumers (28 of 539), 8% for panel pharmacists (9 of 117) and 9% for opt-in medical products industry respondents (135 of 1456). The majority of panel consumers (59%, 316 of 539), panel pharmacists (74%, 86 of 117), and opt-in medical products industry respondents (66%, 959 of 1,456) agreed or strongly agreed. As expected, panel consumers appeared to have less awareness of advertising enforcement actions than panel pharmacists or opt-in medical products industry respondents. Around one quarter of panel consumers (22%, 119 of 539) stated they were 'not sure', compared to 3% of panel pharmacists (3 of 117) and 11% of opt-in medical products industry respondents (157 of 1,456).

The second enforcement item was intended to capture perceptions of the full range of our enforcement actions: 'The TGA takes strong action against illegal behaviour'. The pattern of responses for this item was similar to the advertising enforcement item, with 21% of panel consumers indicating they were 'not sure' (111 of 539) and only 5% (28 of 539) indicating they disagreed or strongly disagreed. The majority of panel consumers (60%, 324 of 539), panel pharmacists (78%, 91 of 117) and opt-in medical products industry respondents (70%, 1015 of 1,454) agreed or strongly agreed.

When taken together, these results suggest that our stakeholders generally perceive that the TGA takes strong action in response to non-compliance with the therapeutic goods legislation. However, the results also highlight an opportunity to increase the visibility of TGA compliance and enforcement actions, especially for consumers. The TGA website includes more information about [compliance and enforcement,]() including a complete list of actions and outcomes.

Responding to COVID-19

Responding to the COVID-19 pandemic continues to be a priority for the TGA. In the 2020 survey, respondents who were aware of the TGA were asked whether they agreed that 'the TGA has responded effectively to the COVID-19 pandemic'.

Results for the COVID-19 item followed a similar pattern to the enforcement items described above. Nett disagreement was 5% (26 of 539) for panel consumers, 7% (8 of 117) for panel pharmacists, and 5% (76 of 1453) for opt-in medical products industry respondents. In the panel consumer sample, 40% of respondents (216 of 539) agreed or strongly agreed, with 23% (124 of 539) selecting 'neither agree nor disagree' and 32% (173 of 539) selecting 'not sure'.

The majority of panel pharmacists (64%, 75 of 117) and opt-in medical products industry respondents (67%, 978 of 1,453) agreed or strongly agreed, with the remaining respondents in these groups selecting 'neither agree nor disagree' or 'not sure'.

These results suggest that stakeholders were generally satisfied with the TGA's response to COVID-19, but there were also some stakeholders, especially consumers, who were unaware or uncertain of the TGA's role in, or response to, COVID-19. Readers can learn more about our response on our COVID-19 information page and in the TGA Business Plan 2020-21.

Perceptions of medicines and medical devices

In order to understand how consumers, health professionals and other non-industry respondents perceive medicines, complementary medicines and medical devices in Australia, a set of items covering topics such as perceived appropriateness of regulation, perceived manufacturing quality, and confidence in post-market monitoring was included. For these items, medicines were defined as prescription and non-prescription medicines (excluding complementary medicines). Complementary medicines were defined with examples such as 'vitamins, minerals, herbal or aromatherapy products'. Medical devices were defined with examples such as 'medical gloves, bandages, neck braces, condoms, pregnancy tests, implants and X-ray equipment'.

For both panel consumers and panel pharmacists, respondents expressed the greatest confidence in medicines regulation, followed by medical devices regulation and complementary medicines regulation. This pattern is illustrated in responses to the statement 'I am confident the government monitors [product type] to identify safety issues'. For panel consumers, 78% of respondents (809 of 1,037) agreed or strongly agreed that they were confident that the government monitors medicines to identify safety issues, compared to 71% (741 of 1,037) for medical devices and 48% (501 of 1,037) for complementary medicines. For panel pharmacists, nett agreement for these items was 97% (113 of 117), 86% (101 of 117) and 39% (46 of 117) respectively. For both panel consumers and panel pharmacists, nett disagreement was greatest for the complementary medicines items. For example, 29% of panel pharmacists (34 of 117) disagreed or strongly disagreed with the post-market monitoring item for complementary medicines, compared to 0% (0 of 117) for medicines and 2% (2 of 117) for medical devices.

For readers who wish to learn more, the TGA website includes more information about our risk-based approach to regulating medicines, complementary medicines and medical devices.

Medicine shortages

The TGA has a role in monitoring and managing medicine shortages in Australia, including through publishing information about medicine shortages on the TGA website. Consumers and health professionals were asked their perceptions of the medicine shortages information that the TGA provides.

About one third of panel consumers who were aware of the TGA were also aware that the TGA monitors and manages medicine shortages in Australia (32%, 170 of 539). Of these respondents, 21% (36 of 170) had accessed medicine shortages information on the TGA website. Although few in number, this group was satisfied with their experience, with 81% (29 of 36) agreeing or strongly agreeing 'the information is helpful', 89% (32 of 36) agreeing or strongly agreeing 'the information is trustworthy', and 86% (31 of 36) agreeing or strongly agreeing 'the search function (database) is useful to find the information I need'.

Compared to panel consumers, a larger percentage of panel pharmacists were aware of the TGA's role in medicine shortages (86%, 101 of 117). Of those who were aware of the TGA's role in medicine shortages, 62% (73 of 101) had accessed medicine shortages information on the

TGA website. As for panel consumers, most panel pharmacists who accessed the website agreed or strongly agreed that 'the information is helpful' (88%, 64 of 73) and 'trustworthy' (92%, 67 of 73). Most also agreed or strongly agreed that 'the search function (database) is useful for finding the information they need' (81%, 59 of 73).

Respondents were also asked what they think the TGA can do to improve the monitoring and management of medicine shortages. Consistent with limited awareness among panel consumers, some respondents commented on the importance of timely and widespread communication:

> *Keep people aware through media etc of such monitoring and management.* (Panel consumer, female, 75 years or older, capital city)
>
> *Send updates to pharmacies.* (Panel pharmacist).
>
> *Notify us well before the shortage has started.* (Panel pharmacist)

Respondents also noted the importance of sourcing reliable and up-to-date data to underpin medicine shortages communications:

> *Be more aware on the increasing trends of usage vs production rates of all medications. Have a clearer line for doctors/ pharmacies to contact the TGA at the first sign of a shortage.* (Panel consumer, female, 25–34 years, capital city)
>
> *Just keep it as real time data location based*. (Panel consumer, female, 35–44 years, regional/rural area)
>
> *More accurate dates of resumed supply.* (Panel pharmacist)
>
> *Consult pharmacist for advice on stock shortages rather than having suppliers report expected shortages.* (Panel pharmacist)

Some respondents also suggested where they thought the TGA could do more to prevent, limit or remediate medicines shortages. Examples of comments consistent with this theme include:

> *Investigate the possibility of more medicines being manufactured in Australia instead of relying on overseas suppliers.* (Panel consumer, male, 65–74 years, capital city)
>
> *The only thing I can think of that would make a difference would be to increase stockpiles of vital, quality of life medications that people can't go without ... Perhaps even encourage local production.* (Panel consumer, male, 55–64 years, capital city)
>
> *Proactively making alternatives available*. (Panel pharmacist)

Readers can learn more about the TGA's role in monitoring and managing medicine shortages on our website. We encourage health professionals to subscribe to our medicine shortages alert service.

Collaboration and consultations

Respondents who had heard of the TGA were asked their perceptions of the TGA as a collaborative and consultative organisation. We asked all respondents who were aware of the TGA to indicate their level of agreement with three general items:

- 'the TGA provides opportunities to input into key decisions that impact me'
- 'the TGA listens to feedback'
- 'the TGA is collaborative'.

We observed a notable proportion of 'neither agree nor disagree' and 'not sure' responses across all three items for panel consumers, panel pharmacists and opt-in medical products industry respondents. ‘Neither’ responses ranged from 20–46% of respondents in these groups. Panel consumers were the most likely to select ‘not sure’, with around one third of panel consumers consistently selecting this option compared to 8–16% of panel pharmacists and 6–9% of opt-in medical products industry respondents. These results may suggest that many respondents (especially panel consumers) were not familiar enough with the TGA to offer a strong view on how we consult and collaborate with stakeholders. Where respondents did offer a positive or negative view, nett agreement was consistently greater than nett disagreement. Nett agreement for these items ranged from 27–42% for panel consumers, from 34–54% for panel pharmacists, and from 52–60% for opt-in medical products industry respondents. Nett disagreement for opt-in medical products industry respondents was around 15% for all three items. For both panel consumers and panel pharmacists, nett disagreement was greatest for the ‘provides opportunities to input’ item at 15% (81 of 539) and 22% (26 of 117) respectively.

Respondents who were aware of the TGA were also asked if they had been involved in responding to a TGA consultation document or attending a TGA consultation event (such as a consultative meeting, forum or workshop) in the last 12 months. Participation was greatest among opt-in medical products industry respondents, with 31% of respondents (447 of 1,446) participating compared to 5% of panel consumers (26 of 539) and 4% of panel pharmacists (5 of 117). The majority of opt-in medical products industry participants (59%, 263 of 444) and panel consumer participants (81%, 21 of 26) stated that the last TGA consultation they were involved in was a public consultation. For panel pharmacists, 2 of the 5 consultation participants stated they participated in a public consultation.

Respondents who participated in a consultation over the past 12 months were asked about different aspects of the consultation experience. Given the small number of panel consumers and panel pharmacists who participated in a consultation, we focus here on the opt-in medical products industry responses. Panel consumer results are available in Table 19. The majority of opt-in medical products industry consultation participants agreed or strongly agreed that ‘the TGA did enough to notify affected people of the chance to participate’ (72%, 317 of 440), ‘the consultation process made it as easy as possible for me to participate’ (78%, 344 of 440), ‘consultations materials, such as papers or presentations, were easy to understand’ (75%, 332 of 440), and ‘the timeframes for providing input were long enough’ (67%, 296 of 439). Fewer respondents agreed or strongly agreed that the ‘the TGA genuinely considered participant input’ (50%, 217 of 438) and ‘the TGA clearly explained the reasons for the final outcome’ (51%, 225 of 440). However, there were also greater proportions of respondents who selected ‘not applicable/too early to say’ for these items (15%, 66 of 438, and 17%, 74 of 440, respectively). In total, 64% of opt-in medical products industry respondents (279 of 439) were satisfied or very satisfied with their overall consultation experience, compared to 12% (53 of 439) who were dissatisfied or very dissatisfied.

When asked to explain their satisfaction or dissatisfaction with the consultation experience, respondent comments related to various aspects of the consultation process. A number of respondents expressed satisfaction with having their views considered as part of the process:

> *I am satisfied to be allowed to have an involvement and for TGA to follow up / respond to that feedback.* (Opt-in medical products industry, sponsor, business with 20–199 employees)

> *Everyone who attended the forum were given a chance to voice out their opinions and asked to give more information/clarification.* (Opt-in medical products industry, regulatory affairs consultant)

> *Our issues were heard and listened to. Aspects that could not be addressed were explained within the context of the legislative framework.* (Opt-in medical products industry, industry association representative)

For those respondents dissatisfied with their consultation experience, comments related to themes such as consulting with a broader range of stakeholders, increasing the length of consultation periods, listening to stakeholder feedback, and facilitating consultation processes more effectively. Illustrative comments include:

> *TGA did not consider stakeholder feedback in context or failed to justify why they felt that stakeholders views were unimportant [....]* (Opt-in medical products industry, regulatory affairs consultant)
>
> *Consultations are sometimes targeted to specific groups or those that have made a response in the past. Consultations must be more widely available depending on the area of consultation required (public, industry, everyone).* (Opt-in medical products industry, sponsor, business with 20–199 employees)
>
> *There were some instances where I believe the TGA could [have] listened to the industry perspective a bit better. There were some occasions where I believe we were not given enough time to respond.* (Opt-in medical products industry, sponsor, business with 200-599 employees).
>
> *I attended to a workshop last year and during the Q&A the TGA representatives were not clear enough with their answers. It created more confusion than clarification.* (Opt-in medical products industry, sponsor, business with 20–199 employees)

Readers who wish to learn more about TGA consultations, including the outcomes of closed consultations, can find information on our consultations and reviews page.

Contacting the TGA

The COVID-19 pandemic resulted in a substantially increased number of enquiries to the TGA in 2020. Survey respondents aware of the TGA were asked about their experiences with contacting the organisation.

The majority of opt-in medical products industry respondents (95%, 1,352 of 1,424) had contacted the TGA at least once, with most industry respondents contacting us either 'about once a year' (34%, 482 of 1,424) or 'about once a month' (30%, 430 of 1,424). For panel pharmacists, 67% of respondents (78 of 117) had contacted the TGA at least once. As for opt-in medical products industry respondents, most panel pharmacists contacted the TGA 'about once a year' (38%, 44 of 117) or 'about once a month' (21%, 24 of 117). By contrast, the majority of panel consumers (85%, 460 of 539) had never contacted the TGA. As for other stakeholder groups, 'about once a year' was the most common contact frequency (7%, 36 of 539).

The main reasons for contacting the TGA were generally consistent with stakeholder roles. When selecting one or more options from a list of contact reasons, the top three reasons for opt-in medical products industry respondents were to 'lodge an application with the TGA', (67%, 900 of 1,351) 'check the progress of an application' (49%, 667 of 1,351) or 'information about manufacturing products' (24%, 330 of 1,351). For panel pharmacists, the top three reasons were 'information about product recalls' (67%, 52 of 78), 'information on specific products' (38%, 30 of 78) and 'reporting or enquiring about a problem with a medical device or medicine' (29%, 23 of 78). In an unexpected result, the three most common reasons for panel consumers were 'information about manufacturing products' (33%, 26 of 79), 'information on specific products' (29%, 23 of 79) and to 'check the progress of an application' (27%, 21 of 79). Although it is possible some panel consumers could be working in the medical products industry, it seems more likely that panel consumers interpreted these response options in unexpected ways. For example, a consumer might interpret 'information about manufacturing products' as information about where or how a product is manufactured, as opposed to information about how to become a manufacturer. Similarly, 'checking the progress of an application' might be interpreted as following up any complaint or enquiry, as opposed to an application to supply a product.

Across all three stakeholder groups, phone, email and online forms were the most common contact methods, though some respondents used other contact methods, such as fax or letters. Respondents were asked to indicate generally how long it took for the TGA to respond to enquiries using different methods. We focus here on opt-in medical products industry respondents because the opt-in industry sample for this question is substantially larger than either of the panel samples (see Table 24 for breakdowns for panel consumers and Table 53 for breakdowns for panel pharmacists). Consistent with the inherent immediacy of phone enquiries, phone enquiries had the largest proportion of responses in less than one day (52%, 378 of 724). Responses for a further 28% of phone enquiries (205 of 724) were received within 1-2 days. For email enquiries, most responses were received within less than 3 days (50%, 578 of 1,163) or 3–10 days (40%, 466 of 1,163). Most online form responses were also received within less than 3 days (47%, 182 of 389) or 3–10 days (41%, 159 of 389).

When asked to indicate their general satisfaction with different enquiry methods, opt-in medical products industry respondents expressed similar levels of nett satisfaction for phone (73%, 531 of 732), email (70%, 816 of 1,174) and online forms (67%, 269 of 401). For panel pharmacists, nett satisfaction was 91% (31 of 34) for phone, 69% (22 of 32) for email and 70% (26 of 37) for online forms. For panel consumers, nett satisfaction was 76% (13 of 17) for phone, 60% (32 of 53) for email, and 83% (15 of 18) for online forms. When asked to rate their overall satisfaction with their experience of communicating with the TGA, 72% of opt-in medical products industry respondents (949 of 1,326) were satisfied or very satisfied. For panel consumers, overall nett satisfaction was also 72% (57 of 79). For panel pharmacists, overall nett satisfaction was 94% (64 of 68).

Respondents were also asked to provide details about their experience communicating with the TGA. Many respondents expressed satisfaction with their experience:

> *The TGA personnel are very informative and answer all of my questions that I have asked.* (Panel consumer, female, 45-54 years, regional/rural area)

> *I am happy that TGA can look up information for me right away instead of waiting few hours in queue or putting me through to another department.* (Panel pharmacist)

> *All my interactions with TGA are very professional and helpful. As a representative of my company, I am always trying to ensure compliance and the correct way to do this. TGA are respectful of this and we have always had very successful and helpful conversations and interactions.* (Opt-in medical products industry, sponsor, business with 200–599 employees)

For those who expressed dissatisfaction, the timeliness and clarity of responses to enquiries were the most common reasons for dissatisfaction:

> *Slow response and inadequate info.* (Panel consumer, male, 25-34 years, capital city)

> *Took a long time to reply and did not give a straight answer.* (Panel pharmacist)

> *I only ask when the answer is not obvious but am waiting MONTHS in most cases. Very often TGA does NOT read the enquiry and provide a 'stock standard' answer after I've already clearly stated that I have already read/considered a, b, c, d, e, f and g.* (Opt-in medical products industry, regulatory affairs consultant)

Some respondents in the medical products industry conveyed difficulty with reaching TGA staff on the phone:

> *Telephone communication, which is my preferred method of contact for questions, is becoming less available and less timely - and there are times when there is no available number or way to contact via phone - being routed to email*. (Opt-in medical products industry, sponsor, business with 20–199 employees).

These comments provide useful feedback to inform our ongoing efforts to ensure responses to enquiries are as timely and useful as possible.

Readers can learn more about our [customer services standards] and [how to contact the TGA] on our website. If contact information for a specific area of the TGA is not listed on our website, please use the general TGA information line (1800 020 653 free call within Australia) or email [info@tga.gov.au]

The TGA website

There is a distinction in the stakeholder survey between the TGA information website at www.tga.gov.au (the TGA website) and the TGA Business Services (TBS) portal at https://www.business.tga.gov.au/ (the TBS portal). We discuss the TGA website first before turning to the TBS portal.

Opt-in medical products industry respondents visited the TGA website with the greatest frequency, followed by panel pharmacists and panel consumers. Indeed, most panel consumers had never visited the TGA website (82%, 847 of 1,037). The most common visit frequency among panel consumers was 'about once a year' (8%, 80 of 1,037). For panel pharmacists, 8% of respondents (9 of 117) had never visited the website, with the most common visit frequency as 'about once a month' (34%, 40 of 117). An unexpected 14% of opt-in medical products industry respondents (201 of 1,405) stated they had never visited the TGA website. Although it is possible that some industry respondents meet their needs exclusively through the TBS portal (see below), it is also possible that some respondents were uncertain of the boundary between the information website and the TBS portal (i.e. they may have visited the information website without realising). Other respondents may have completed the survey on behalf of their organisation but they had not used the website personally. In any case, the most common visit frequency for industry respondents was 'more than once a week' (30%, 417 of 1,405).

Reasons for visiting the TGA website were consistent with stakeholder roles. When selecting one or more options from a list, the three most commonly selected options for panel consumer website visitors were 'safety information' (30%, 57 of 190), 'product details' 29% (56 of 190) and 'accessing information related to COVID-19' (24%, 45 of 190). For panel pharmacist website visitors, the three most frequently selected options were 'information about medicine shortages' (62%, 67 of 108), 'accessing information for health professionals' (37%, 40 of 108) and 'product details' (36%, 39 of 108). For the opt-in medical products industry website visitors, the top three reasons were 'guidance documents' (75%, 901 of 1,204), 'accessing TGA databases such as the ARTG' (73%, 881 of 1204), and 'fees and charges information' (55%, 664 of 1,204).

Panel consumers were generally satisfied with the TGA website. Among panel consumer visitors to the website, most were satisfied or very satisfied with the 'language used' (82%, 156 of 190), 'navigating the site' (82%, 156 of 190), and the 'look and feel' (76%, 144 of 190). Overall nett satisfaction for panel consumers was 85% (160 of 190). Nett satisfaction for panel pharmacists ranged between 78% (84 of 108) for 'navigating the site' and 91% (100 of 108) for 'language used' and 'overall satisfaction'. Opt-in medical products industry respondents were also generally satisfied with the website. Nett satisfaction for the overall satisfaction item and most individual items ranged between 73–86%. However, we observed a lower level of nett satisfaction (60%, 720 of 1192) and a higher level of nett dissatisfaction (17%, 208 of 1192) for 'navigating the site'.

Navigation was a notable theme when respondents were asked to comment on how the TGA could improve the current website, with a number of respondents expressing difficulty finding the information they needed:

> *There is a lot of info on the website and this makes it difficult to navigate at times. Some sort of logic that assists in helping you find what you want (a bit like the Centrelink website does) would be useful.* (Panel consumer, male, 35–44, capital city)

> *It's got a lot of information but I often find it hard to find what I want and have to look through a lot of things to get the information.* (Panel pharmacist)

> *Finding related information to my investigation is an exercise in looking at every possible location. There is no page on where to find information listed in a logical manner.* (Opt-in medical products industry, sponsor, business with 20–199 employees)

Compounding navigation challenges, some respondents expressed dissatisfaction with the performance of the website search function. Some also encountered outdated material on the website or found it difficult to assess the currency of the material. Alongside these challenges, the information respondents found was not always easy to understand:

> *The regulatory framework is quite complex and can be confusing, taking several reads to understand meaning and intent.* (Opt-in medical products industry, sponsor, business with 1–19 employees)

> *There is a level of assumed knowledge when using the site, both in language and structure. For those less experienced it can be very difficult to use.* (Opt-in medical products industry, regulatory affairs consultant)

These results inform our ongoing work to enhance the user experience on the TGA website.

The TGA Business Services portal

As outlined in the section on the TGA website above, we made a distinction in the survey between the TGA website and the TGA Business Services (TBS) portal. Whereas we asked all respondents who were aware of the TGA about their use of the TGA website, we targeted questions about the TBS portal to respondents in the medical products industry.

One quarter of opt-in medical products industry respondents stated they had not visited the TBS portal (25%, 344 of 1,399). This result is unexpected given that our main method of recruiting industry respondents was an email to users with an active TBS account. Although we provided a screenshot of the TBS login page in the survey, some respondents may have been unclear about what the TBS system entails. Other respondents may have completed the survey on behalf of their organisation and not used the portal personally. Of those respondents who had visited the TBS portal, the most common visit frequency was ‘more than once a week’ (25%, 345 of 1,399). The most common reasons for visiting the portal were ‘lodging an application’ (57%, 791 of 1,399), ‘checking the progress of an application’ (47%, 661 of 1,399) and ‘varying or modifying an application’ (36%, 501 of 1,399).

Most opt-in medical products industry respondents were satisfied or very satisfied with the TBS portal (74%, 772 of 1,045). Nett dissatisfaction was 10% of respondents (107 of 1,045). When we asked respondents how we could improve the TBS portal, some respondents expressed general difficulty with using or navigating the site:

> *Although I am able to navigate satisfactorily in the existing layout, it is not always intuitive to use and it is sometimes difficult to find the option or complete the task that needs to be done.* (Opt-in medical products industry, sponsor, business with 1000–1499 employees)

> *[TBS] is the worst and looks like it’s something from the early 2000's. It’s difficult to navigate, illogical and painful to use.* (Opt-in medical products industry, sponsor, business with 1–19 employees)

Some respondents also reported poor system performance:

> *It is prohibitively slow [….] We had to employ a junior staff member to fill out applications as it was not financially viable for us to have senior staff spend the hours it takes to fill in application due to how slow the system is. A listing for a multivitamin product took 18 hours!* (Opt-in medical products industry, regulatory affairs consultant)

> *Lots of issues with the prescription medicine variations portal this year. It tends to work better with Firefox than any other browser. Whilst it can be difficult, minimising service disruptions to the website would be great (or less down time - i.e. fix IT issues faster if possible).* (Opt-in medical products industry, sponsor, business with 200–599 employees)

Respondents suggested a range of specific features and functions they would like to see improved. For example, some respondents requested increased file size limits for uploads. Others requested clearer and faster confirmation that the TGA has acknowledged Clinical Trial

Notifications. Still others expressed difficulty with logging-in to the TBS portal, stating that password resets were too frequent.

These results inform our ongoing work to enhance the user experience on the TBS portal. In 2020, the Australian Government announced it would invest $12 million over four years to digitise, transform and modernise the TGA's business systems and infrastructure. Funding for the TGA's digital transformation projects will come from the TGA's special account reserves. Any ongoing maintenance and support costs for systems built will be subject to fees and charges levied on sponsors and manufacturers of therapeutic goods.

The TBS landing page includes more information about how to get started with TBS, how to use the site, and how to seek help.

SME Assist

The TGA offers a service called SME Assist to support small and medium enterprises, researchers, start-ups and those unfamiliar with regulation to better understand their regulatory and legislative obligations. Respondents in the medical products industry who worked in businesses with less than 200 employees were asked about their awareness, use and perceptions of SME Assist.

In total, 44% of SME respondents (417 of 944) were aware of the SME Assist service. Of those who were aware of the service, 44% (184 of 417) had accessed the SME Assist portal on the TGA website and 18% (74 of 417) had attended a SME Assist event, such as a workshop or webinar. The majority of respondents who were aware of SME Assist agreed or strongly agreed that the service is targeted (53%, 213 of 402) and useful (55%, 218 of 398), with nett disagreement for these items at 6% or less. However, around 20% of respondents selected 'neither agree nor disagree'. A further 20% selected 'not sure'. These results suggest that respondents were generally satisfied with SME Assist, but many respondents were not familiar enough with the service to offer a strong view.

Readers can access the SME Assist portal on the TGA website.

Stakeholder information interests

As outlined above, respondents were asked about their reasons for contacting the TGA, visiting the TGA website, and visiting the TBS portal. However, respondents who were not in the medical products industry were also asked about the types of information they would be interested in receiving from the TGA.

When selecting one or more topics from a list, panel consumers and panel pharmacists were broadly similar in their information preferences. For both groups, the three most commonly selected topics were 'safety information about medicines and medical devices', 'product recalls', and 'reporting problems or side effects of medicines or medical devices'. Consistent with working as health professionals, a greater proportion of panel pharmacists selected 'training, workshops or presentations about medicines and medical devices' than panel consumers. This option was the fourth most frequently selected for panel pharmacists, whereas it was the least selected option for panel consumers.

Overall, these results highlight the importance of safety-related information for both consumers and pharmacists. Readers who wish to stay informed of the latest safety information from the TGA can subscribe to the TGA safety information email list or follow us on Facebook, Twitter, LinkedIn and Instagram. We also offer health professionals practical information and advice through our Medicines Safety Updates and Medical Devices Safety Updates.

What the TGA can do better

The final question of the survey sought respondents' ideas around what the TGA can do better, inviting them to comment on any aspect of the TGA and our work. Stakeholders made diverse comments. Some comments reiterated themes related to contacting the TGA, the TGA website, the TBS portal, and medicine shortages. Please see above for a discussion of these themes. Here, we focus on the major themes that were unique to the question on 'what the TGA can do better'.

The predominant theme for panel consumers related to building awareness of the TGA and its role in the Australian community. Beyond comments that reiterated themes related to medicine shortages, building awareness of the TGA was also a notable theme for panel pharmacists. Examples of comments consistent with this theme include:

> *Provide greater information on what they do and why it's important to consumers.* (Panel consumer, female, 45–54 years, capital city)
>
> *TGA can better advertise who they are and what they do as most people have no idea what they are.* (Panel consumer, female, 25–34 years, regional city/town)
>
> *Try actively [to] give information to the general public so that people are aware of the TGA and [what] it does.* (Panel pharmacist)
>
> *Perhaps raise more awareness about what the TGA does, and how it can be useful to pharmacists. Raising awareness about services TGA provides such as education*. (Panel pharmacist)

These comments are consistent with limited awareness of the TGA among panel consumers (see above).

Opt-in medical products industry respondents suggested a range of areas for the TGA to improve. Some respondents stated that fees and charges were too high or sought faster decision making and processing of applications. Others requested more guidance and assistance to help them understand the regulatory framework. Enforcing the regulations to ensure safety and a level playing field was also a notable theme. Examples of comments from these themes include:

> *Ongoing TGA product fees for companies with small turnovers is onerous. Needs to be some sort of scaled fee relating to overall company turnover*. (Opt-in medical products industry, sponsor, business with 1–19 employees)
>
> *Have more staff available to help new participants to navigate processes and regulations contextually.* (Opt-in medical products industry, manufacturer, business with 20–199 employees)
>
> *Clarity on decision making criteria and faster decision making in the time of the pandemic and beyond*. (Opt-in medical products industry, manufacturer, business with 1500 or more employees)
>
> *Be more vigorous in pursuing companies who make therapeutic claims, on labelling or in advertising, either explicit or implied, about products that are not registered or which are registered but have inadequate evidence to support claims being made*. (Opt-in medical products industry, sponsor, business with 1–19 employees)

In this way, the comments from opt-in medical product industry respondents reflect their role as engaged users of TGA services and systems.

Additional insights from opt-in respondents

In addition to the results from the panel consumers, panel pharmacists and the opt-in medical products industry respondents summarised above, further insights into stakeholder views of the TGA come from the opt-in consumers and opt-in health professionals who completed the 2020 survey.

Opt-in consumers

A total of 116 opt-in consumers completed the 2020 survey. The opt-in consumer sample reflects the views of a group of consumers who are more likely to be aware of the TGA and more likely to have experienced adverse events with medicines or medical devices.

Unlike the panel consumer sample, the opt-in consumer sample did not include quotas to help ensure the final sample was broadly representative of the Australian population. For example, the opt-in consumer sample had a greater proportion of respondents who were aware of the TGA (89% vs. 52%), a greater proportion of respondents who identified as female (65% vs. 51%), a smaller proportion of respondents aged between 18-34 years (14% vs. 31%) and a greater proportion of respondents who had experienced side effects with a medicine (32% vs 24%) or problems with a medical device (29% vs 2%).

Compared to panel consumers, opt-in consumers consistently expressed lower levels of nett satisfaction and higher levels of nett dissatisfaction. For example, 35% of opt-in consumers (32 of 91) disagreed or strongly disagreed with the statement 'I trust the TGA to perform its role ethically and with integrity'. By contrast, nett disagreement for this item among panel consumers was 4% (24 of 539). Lower levels of trust and satisfaction among opt-in consumers are understandable given the higher proportion of respondents who had experienced adverse events.

When asked what the TGA could do better, opt-in consumer comments echoed themes we observed in other groups, including calls to enforce regulations more effectively and to build awareness of the TGA and its role in the Australian community. Opt-in consumers also emphasised the importance of thorough safety assessments at both the pre-market and post-market stages, especially for medical devices. Some respondents shared the direct experience of adverse events related to medical implants. Examples of comments consistent with this theme include:

> *Take note of the women suffering mild/severe health issues from breast implants.* (Opt-in consumer, female, 35-44 years)

> *Regulate medical devices properly. My health has been destroyed by an approved hernia mesh implant that has since been shown to have a defective design.* (Opt-in consumer, female, 55-64 years, capital city)

> *Actually provide accurate information earlier then present. The Essure [ha]s finally been recalled as such within Australia. Yet most doctors know very little about it so don't accept women's concerns regarding this product. It's been a living hell for many of us with extreme side effects.* (Opt-in consumer, female, 25-34, regional city/town)

> *Look more into the danger and side effects of medical devices that we put in our bodies that we trust are safe* (Opt-in consumer, female, 35-44 years, regional city/town).

We acknowledge the respondents who shared their experiences with adverse events in the survey. If you are seeking information or support, the TGA website includes information related to breast implants, transvaginal mesh, the Essure contraceptive device, and other topics.

Opt-in health professionals

A total of 158 opt-in health professionals completed the 2020 survey. As for opt-in consumers, opt-in health professionals were more likely to be closely engaged with the TGA than their panel counterparts (i.e. the panel pharmacists). For example, 4% of panel pharmacists (5 of 117) had participated in a TGA consultation during the last 12 months compared to 22% of opt-in health professionals (32 of 143). The opt-in health professional sample was also more diverse than the panel pharmacist sample. The panel pharmacist sample was made-up of a single type of health professional, whereas the opt-in health professional sample included medical practitioners (32), pharmacists (23), nurses (14), complementary healthcare practitioners (13), dental practitioners (10) and others (65). Examples of ‘others’ included health professionals working in medical science, clinical research, pathology, optometry, and quality assurance.

Overall and in aggregate, opt-in health professionals appeared to be generally less satisfied with the TGA’s performance than panel pharmacists. However, given the diversity of the opt-in health professional sample and the small size of sub-groups in this sample, results for the opt-in health professional sample should be interpreted with caution. For items on complementary medicines, responses of complementary healthcare practitioners appeared to diverge from other health professional roles, though the small size of these groups should again be noted. For example, 42% of opt-in medical practitioners (13 of 31) disagreed or strongly disagreed with the statement ‘I am confident the government monitors complementary medicines to identify safety issues’. Nett disagreement for the same item for complementary healthcare practitioners was 15% (2 of 13). Contrasting positions on complementary medicines regulation were also apparent in comments from opt-in health professionals in response to the open-ended question about what the TGA can do better:

> *Provide more stringent reviews of claims made by complementary medicine practitioners of their products and 'diagnostic' machines and 'laboratories'. More stringent quality control of herbal and naturopathic medications. Where applicable health warnings should be applied to all herbal and naturopathic medicines. These complementary 'medicines' should have to undergo the same quality control and trials that standard medications have to undergo [....]* (Opt-in medical practitioner)

> *Public safety and health is the fundamental role and objective of TGA, but a range of effective, safe and cheap complementary products are NOT available in Australia. This is also a potential negative impact to public who have such demand for their health. The overall system need to be reviewed and improved to address this issue*. (Opt-in complementary healthcare practitioner)

These comments illustrate the ways in which our stakeholders sometimes hold divergent views of what represents appropriate regulation for a class of products.

What happens next

The 2020 TGA Stakeholder Survey results were used to inform the *TGA Regulator Performance Framework: Self-Assessment Report, July 2019 to June 2020*. The survey results also inform our ongoing efforts to continue improving our performance as a regulator and the way we work with our stakeholders.

Panel consumer results

The tables in this section of the report present results for the panel consumer sample.

- For more information about the panel consumer sample, see Sampling methods.
- For general notes about interpreting results tables, see Interpreting percentages and results tables.
- For definitions of abbreviations, see Appendix 1: Abbreviations.

Panel consumers – demographics

Consumer respondents were asked basic demographic questions, including gender, age, state and region.

Table 1. Panel consumers – 'What is your gender?'

Gender	%	N
Female	51	525
Male	49	505
Indeterminate/Intersex/Unspecified	<1	2
Prefer not to say	<1	5
Total	100	1037

Table 2. Panel consumers – 'What is your age?'

Age	%	N
18 - 24	8	82
25 - 34	23	242
35 - 44	21	216
45 - 54	14	144
55 - 64	16	168
65 - 74	12	128
75 or older	5	57
Total	100	1037

Table 3. Panel consumers – 'In which state or territory do you live?'

State	%	N
NSW	30	313
VIC	28	294
QLD	17	181
SA	8	85
WA	11	112
TAS	2	25
ACT	2	23
NT	<1	4
Total	100	1037

Table 4. Panel consumers – 'Where do you live?'

Region	%	N
Capital city	70	724
Regional city/town	22	224
Regional/Rural area	8	84
Remote area	<1	5
Total	100	1037

Panel consumers – use and experience of medicines and medical devices

Consumer respondents were asked about their use and experience of medicines and medical devices.

Table 5. Panel consumers – 'Which of the following statements are true for you? Select all that apply.'

Category	%	N
I use complementary medicines, such as vitamins	53	550
I take regular medications, such as pain medications, oral birth control or blood pressure medication	52	541
I have experienced side effects with a medicine	24	251
I have experienced difficulty obtaining my usual medication in the past 12 months	7	71
I use medical devices, such as a pacemaker, hip joint replacement, or Epipen	6	64
I have experienced problems with a medical device	2	22
None of the above	20	211
Prefer not to answer	1	9

Panel consumers – awareness of the TGA

All respondents (except those in the medical products industry) were asked about their awareness of the TGA.

Table 6. Panel consumers – 'Had you heard of the Therapeutic Goods Administration (TGA) prior to participating in this survey?'

Response	%	N
Yes	52	539
No	48	498
Total	100	1037

Panel consumers – understanding of TGA regulatory scope

All respondents (except those in the medical products industry) were asked about what they think the TGA regulates.

Table 7. Panel consumers – 'What does the TGA regulate? Select all that apply.'

Statement	%*	N
Any medicines available in a pharmacy **(correct)**	50	515
Medicines prescribed by a doctor **(correct)**	44	457
Medicines available in supermarkets **(correct)**	38	396
Medical devices, such as bandages and pacemakers **(correct)**	32	331
Advertising of medicines and medical devices **(correct)**	28	292
Allied health professionals (e.g. Physiotherapists) **(incorrect)**	14	143
Medical procedures (e.g. scans, tests, surgery) **(incorrect)**	14	140
Health professionals (e.g. Doctors, Nurses) **(incorrect)**	10	105
Veterinary medicines **(incorrect)**	9	94
Foods **(incorrect)**	8	81
Cosmetics **(incorrect)**	8	78
All of the above **(incorrect)**	23	238

*Percentage of total sample (N = 1037).

Table 8. Panel consumers – Number of correct selections for 'What does the TGA regulate? Select all that apply.'

No. correct selections	%*	N
0	8	80
1	21	219
2	13	132
3	9	97
4	13	138
5	13	133

*Percentage of total sample (N = 1037).

Table 9. Panel consumers – Number of incorrect selections for 'What does the TGA regulate? Select all that apply.'

No. incorrect selections	%*	N
0	41	429
1	21	218
2	8	80
3	4	40
4	2	21
5	1	7
6	<1	4
All of the above	23	238

*Percentage of total sample (N = 1037).

Panel consumers – TGA performance

All respondents who were aware of the TGA were asked to indicate their level of agreement with a set of items about the TGA's performance.

Table 10. Panel consumers – TGA performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Balance right – safety vs access	65	14	51	15	3	1	5	16	539
I trust the TGA – ethics and integrity	76	28	49	11	4	1	4	8	539
Takes strong action – advertising	59	20	38	14	4	1	5	22	539
Takes strong action – general	60	21	39	14	4	1	5	21	539
Responded effectively to COVID-19	40	13	27	23	4	1	5	32	539
Provides input opportunities	27	8	19	27	12	3	15	31	539
Listens to feedback	34	11	23	28	5	1	6	32	539
Is collaborative	42	9	32	23	3	1	4	32	539

Panel consumers – perceptions of medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medicines. The perceptions of medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medicines (including prescription and non-prescription)** that are available in Australia. Please note: **Medicines do not include complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products). Please indicate your level of agreement with each statement.

Table 11. Panel consumers – perceptions of medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medicines - appropriately regulated	71	18	53	14	4	1	5	9	1037
Medicines manufactured to a high standard	77	26	51	13	2	1	3	8	1037
Trust medicines in pharmacies	80	31	49	12	3	1	4	3	1037
Trust medicines in supermarkets	57	14	43	28	8	2	10	6	1037
Confident medicines I buy are genuine	80	27	53	12	2	1	3	5	1037
Confident government monitors medicine safety issues	78	27	51	11	3	1	5	7	1037
Risk of medicines balanced against positive impact	70	22	48	17	4	1	5	9	1037

Panel consumers – perceptions of complementary medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of complementary medicines. The perceptions of complementary medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products) that are available in Australia. Please indicate your level of agreement with each statement.

Table 12. Panel consumers – perceptions of complementary medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Complementary medicines - appropriately regulated	36	7	29	24	17	5	22	17	1037
Complementary medicines - manufactured to a high standard	44	10	34	28	8	3	11	16	1037
Confident government monitors complementary medicine safety issues	48	10	38	20	13	4	16	15	1037

Panel consumers – perceptions of medical devices

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medical devices. The perceptions of medical devices items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medical devices** that are available in Australia. Medical devices include a wide range of products, such as medical gloves, bandages, neck braces, condoms, pregnancy tests, implants and X-ray equipment. Please indicate your level of agreement with each statement.

Table 13. Panel consumers – perceptions of medical devices items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medical devices - appropriately regulated	68	15	53	16	3	1	3	13	1037
Medical devices manufactured to a high standard	72	22	50	16	3	1	3	9	1037
Confident medical devices I use are genuine	68	19	49	19	3	<1	3	10	1037
Confident government monitors medical device safety issues	71	20	52	14	3	1	5	10	1037
Risk of medical devices balanced against positive impact	66	20	46	19	3	1	3	12	1037

Panel consumers – perceptions of medicine shortages information

Selected stakeholder groups, including consumers and health professionals, were asked about their awareness and perceptions of the TGA's role in monitoring and managing medicine shortages. A screenshot of the medicine shortages page on the TGA website was included in the questionnaire.

Table 14. Panel consumers – 'Are you aware that the TGA monitors and manages medicine shortages in Australia?'

Response	%	N
Yes	32	170
No	48	261
Not sure	20	108
Total	100	539

Table 15. Panel consumers – 'Are you aware that the TGA monitors and manages medicine shortages in Australia?'

Response	%	N
Yes	21	36
No	76	130
Not sure	2	4
Total	100	170

Table 16. Panel consumers – perceptions of the medicine shortages information on the TGA website

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/NS	N
The information is helpful	81	36	44	8	6	6	11	0	36
The information is trustworthy	89	47	42	0	3	6	8	3	36
The search function (database) is useful to find the information I need	86	36	50	8	3	3	6	0	36

Panel consumers – consultations

All respondents who were aware of the TGA were asked about their participation in consultations. Respondents who had participated in a consultation were asked to rate the TGA's performance for various aspects of the consultation process.

Table 17. Panel consumers – 'In the last 12 months, have you been involved in responding to a TGA consultation document or attending a TGA consultation event (e.g. a consultative meeting, forum or workshop)?'

Response	%	N
Yes	5	26
No	95	513
Total	100	539

Table 18. Panel consumers – 'Was the last TGA consultation that you were involved in a public consultation?'

Response	%	N
Yes	81	21
No	15	4
Not sure	4	1
Total	100	26

Table 19. Panel consumers – consultation performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/TE	N
Did enough to notify participants	73	35	38	12	12	4	15	0	26
Process made it easy to participate	77	31	46	20	4	0	4	0	26
Materials were easy to understand	85	35	50	4	4	8	12	0	26
Input timeframes were long enough	81	31	50	19	0	0	0	0	26
Genuinely considered input	73	35	38	15	0	4	4	8	26
Clearly explained the outcome	81	35	46	19	0	0	0	0	26

Table 20. Panel consumers – 'Overall, how satisfied were you with the consultation process?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	81	35	46	4	12	4	15	26

Panel consumers – contacting the TGA

All respondents who were aware of the TGA were asked if they had contacted the TGA. Respondents who had contacted the TGA were asked about their reasons for contacting the TGA and their satisfaction with the experience.

Table 21. Panel consumer – 'How often do you have contact with the TGA?'

Response	%	N
More than once a week	1	7
About once a week	2	13
Two or three times a month	3	14
About once a month	2	9
About once a year	7	36
Never	85	460
Total	100	539

Table 22. Panel consumers – 'For which of the following reasons do you contact the TGA? Select all that apply.'

Statement	%*	N
Information about manufacturing products	33	26
Information on specific product(s)	29	23
Check the progress of an application with the TGA	27	21
Information about product recall(s)	24	19
Report, or enquire about, a problem with a medical device or medicine	24	19
Lodge an application with the TGA	19	15
Importing/exporting product(s)	14	11
To understand the regulatory process	9	7
In response to TGA service delivery	8	6
Other	5	4

*Percentage of those in contact with the TGA (N = 79).

Table 23. Panel consumers – 'How do you contact the TGA? Select all that apply.'

Response	%*	N
Email	67	53
Online form	23	18
Telephone	22	17
Letter	9	7
Fax	6	5
Other	3	2

*Percentage of those in contact with the TGA (N = 79).

Table 24. Panel consumers – 'Generally, how long does it take for the TGA to respond to your: …'

Contact method	Immediate	<1 day	1–2 days	3–10 days	11–20 days	>20 days	N
Phone enquiry	35	24	18	12	12	0	17
Email	4	13	40	32	9	2	53
Letter	0	14	14	57	14	0	7
Fax	0	20	0	40	0	40	5
Online form	6	11	28	44	11	0	18
Other	50	0	0	50	0	0	2

Table 25. Panel consumers – 'Generally, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Phone enquiry	76	29	47	24	0	0	0	17
Email	60	13	47	32	6	2	8	53
Letter	43	0	43	57	0	0	0	7
Fax	60	40	20	40	0	0	0	5
Online form	83	17	67	17	0	0	0	18
Other	100	0	100	0	0	0	0	2

Table 26. Panel consumers – 'Overall, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	72	18	54	20	6	1	8	79

Panel consumers – the TGA website

Respondents who were aware of the TGA were asked about their use and perceptions of the TGA website. A screenshot of the TGA website homepage was included in the questionnaire.

Table 27. Panel consumers – 'How often do you visit the TGA website?'

Response	%	N
More than once a week	1	9
About once a week	3	30
Two or three times a month	3	29
About once a month	4	42
About once a year	8	80
Never	82	847
Total	100	1037

Table 28. Panel consumers – 'For which reasons did you visit the TGA website in the last 12 months? Select all that apply.'

Statement	%*	N
Safety information	30	57
Product details	29	56
Accessing information related to COVID-19	24	45
Information about medicines shortages	21	40
General information about the TGA	20	38
TGA news	16	31
Fees and charges information	16	30
Education materials	15	29
Guidance documents	13	25
Accessing information for health professionals	13	25
Regulatory decisions and notices	13	24
Accessing information about the scheduling of medications and poisons	13	24
Information on TGA training, workshops or presentations	10	19
Report problems and adverse events	10	19
Importing or exporting product(s) information	9	18
Information on consultations	9	18
Accessing TGA databases such as the ARTG	9	17
TGA publications, including performance reporting	8	16
Accessing information on the medicines and medical devices Reforms (MMDR)	8	16
Provide feedback to the TGA	8	15
Accessing targeted information for small and medium enterprises (SME Assist)	5	9
Other	1	1

*Percentage of website visitors (N = 190).

Table 29. Panel consumers – website satisfaction items

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Language used	82	18	64	14	3	2	4	190
Navigating the site	82	24	58	16	1	1	2	190
Look and feel (colours, icons, other design)	76	21	55	18	5	1	6	190
Overall satisfaction	85	22	63	13	2	1	3	190

Panel consumers – information interests

All respondents (except those in the medical products industry) were asked to indicate the types of information they would be interested in receiving from the TGA.

Table 30. Panel consumers – 'Are you interested in information on any of the following? Select all that apply.'

Statement	%*	N
Product recalls	54	565
Safety information about medicines and medical devices	54	555
Reporting problems or side effects of medicines or medical devices	43	447
Information on traveling with medicines and medical devices	36	374
General information about the TGA	31	325
Accessing medicines and medical devices	27	275
News and publications	24	248
Information on consultations	16	167
Training, workshops or presentations about medicines and medical devices	14	149

*Percentage of total sample (N = 1037).

Table 31. Panel consumers – Number of selections for 'Are you interested in information on any of the following? Select all that apply.'

No. of selections	%*	N
1	33	343
2	20	203
3	16	161
4	11	119
5	7	74
6	4	43
7	3	30
8	2	17
9	5	47

*Percentage of total sample (N = 1037).

Panel pharmacist results

The tables in this section of the report present results for the panel pharmacist sample.

- For more information about the panel pharmacist sample, see Sampling methods.
- For general notes about interpreting results tables, see Interpreting percentages and results tables.
- For definitions of abbreviations, see Appendix 1: Abbreviations.

Panel pharmacists – demographics

Panel pharmacists were asked some demographic questions, including age and state.

Table 32. Panel pharmacists – 'What is your age?'

Age	%	N
18 - 24	3	3
25 - 34	39	46
35 - 44	38	44
45 - 54	10	12
55 - 64	9	11
65 - 74	0	0
75 or older	1	1
Total	100	117

Table 33. Panel pharmacists – 'In which state or territory are you located?'

State	%	N
NSW	38	44
VIC	27	32
QLD	19	22
SA	5	6
WA	10	12
TAS	1	1
ACT	0	0
NT	0	0
Total	100	117

Panel pharmacists – awareness of the TGA

All respondents (except those in the medical products industry) were asked about their awareness of the TGA.

Table 34. Panel pharmacists – 'Had you heard of the Therapeutic Goods Administration (TGA) prior to participating in this survey?'

Response	%	N
Yes	100	117
No	0	0
Total	100	117

Panel pharmacists – understanding of TGA regulatory scope

All respondents (except those in the medical products industry) were asked about what they think the TGA regulates.

Table 35. Panel pharmacists – 'What does the TGA regulate? Select all that apply.'

Statement	%*	N
Any medicines available in a pharmacy **(correct)**	69	81
Medicines prescribed by a doctor **(correct)**	68	80
Medicines available in supermarkets **(correct)**	60	70
Medical devices, such as bandages and pacemakers **(correct)**	57	67
Advertising of medicines and medical devices **(correct)**	52	61
Veterinary medicines **(incorrect)**	39	46
Medical procedures (e.g. scans, tests, surgery) **(incorrect)**	17	20
Cosmetics **(incorrect)**	9	10
Foods **(incorrect)**	7	8
Health professionals (e.g. Doctors, Nurses) **(incorrect)**	5	6
Allied health professionals (e.g. Physiotherapists) **(incorrect)**	3	4
All of the above **(incorrect)**	23	27

*Percentage of total sample (N = 117).

Table 36. Panel pharmacists – Number of correct selections for 'What does the TGA regulate? Select all that apply.'

No. correct selections	%*	N
0	1	1
1	6	7
2	4	5
3	9	11
4	18	21
5	38	45

*Percentage of total sample (N = 117).

Table 37. Panel pharmacists – Number of incorrect selections for 'What does the TGA regulate? Select all that apply.'

No. correct selections	%*	N
0	26	31
1	34	40
2	9	10
3	4	5
4	2	2
5	1	1
6	1	1
All of the above	23	27

*Percentage of total sample (N = 117).

Panel pharmacists – awareness of advertising obligations

Selected stakeholder groups, including health professional and medical products industry respondents, were asked if they advertise therapeutic goods. Advertisers were then asked about their awareness of therapeutic goods advertising rules and the consequences for breaking them.

Table 38. Panel pharmacists – 'Do you advertise or arrange the advertising of therapeutic goods?'

Response	%	N
Yes	42	49
No	58	68
Total	100	117

Table 39. Panel pharmacists – 'Are you aware that there are specific rules for advertising therapeutic goods in Australia?'

Response	%	N
Yes	100	49
No	0	0
Total	100	49

Table 40. Panel pharmacists – 'Are you aware that there are potentially serious consequences for breaking the therapeutic goods advertising rules in Australia, such as fines or court action?'

Response	%	N
Yes	100	49
No	0	0
Total	100	49

Panel pharmacists – TGA performance

All respondents who were aware of the TGA were asked to indicate their level of agreement with a set of items about the TGA's performance.

Table 41. Panel pharmacists – TGA performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Balance right – safety vs access	87	27	61	9	2	2	3	1	117
I trust the TGA – ethics and integrity	93	43	50	3	2	2	3	1	117
Takes strong action – advertising	74	32	42	16	7	1	8	3	117
Takes strong action – general	78	31	47	13	6	1	7	3	117
Responded effectively to COVID-19	64	16	48	22	7	0	7	7	117
Provides input opportunities	36	7	29	34	21	2	22	8	117
Listens to feedback	34	5	29	46	3	0	3	16	117
Is collaborative	54	7	47	27	9	0	9	10	117

Panel pharmacists – perceptions of medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medicines. The perceptions of medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medicines (including prescription and non-prescription)** that are available in Australia. Please note: **Medicines do not include complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products). Please indicate your level of agreement with each statement.

Table 42. Panel pharmacists – perceptions of medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medicines - appropriately regulated	92	32	60	4	2	2	3	0	117
Medicines manufactured to a high standard	92	43	50	6	1	0	1	1	117
Trust medicines in pharmacies	97	54	43	3	0	1	1	0	117
Trust medicines in supermarkets	56	18	38	25	19	0	19	1	117
Confident medicines I buy are genuine	97	44	53	3	0	1	1	0	117
Confident government monitors medicine safety issues	97	47	50	3	0	0	0	1	117
Risk of medicines balanced against positive impact	95	30	65	3	1	1	2	1	117

Panel pharmacists – perceptions of complementary medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of complementary medicines. The perceptions of complementary medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products) that are available in Australia. Please indicate your level of agreement with each statement.

Table 43. Panel pharmacists – perceptions of complementary medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Complementary medicines - appropriately regulated	27	4	23	31	32	7	39	3	117
Complementary medicines - manufactured to a high standard	32	5	27	40	19	6	25	3	117
Confident government monitors complementary medicine safety issues	39	7	32	29	27	2	29	3	117

Panel pharmacists – perceptions of medical devices

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medical devices. The perceptions of medical devices items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medical devices** that are available in Australia. Medical devices include a wide range of products, such as medical gloves, bandages, neck braces, condoms, pregnancy tests, implants and X-ray equipment. Please indicate your level of agreement with each statement.

Table 44. Panel pharmacists – perceptions of medical devices items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medical devices - appropriately regulated	76	15	61	19	2	0	2	3	117
Medical devices manufactured to a high standard	79	21	57	17	2	0	2	3	117
Confident medical devices I use are genuine	85	26	59	12	2	0	2	2	117
Confident government monitors medical device safety issues	86	20	67	9	2	0	2	3	117
Risk of medical devices balanced against positive impact	88	19	69	9	1	0	1	3	117

Panel pharmacists – perceptions of medicine shortages information

Selected stakeholder groups, including consumers and health professionals, were asked about their awareness and perceptions of the TGA's role in monitoring and managing medicine shortages. A screenshot of the medicine shortages page on the TGA website was included in the questionnaire.

Table 45. Panel pharmacists – 'Are you aware that the TGA monitors and manages medicine shortages in Australia?'

Response	%	N
Yes	86	101
No	8	9
Not sure	6	7
Total	100	117

Table 46. Panel pharmacists – 'Have you accessed information about medicine shortages on the TGA website?'

Response	%	N
Yes	72	73
No	22	22
Not sure	6	6
Total	100	101

Table 47. Panel pharmacists – perceptions of the medicine shortages information on the TGA website

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/NS	N
The information is helpful	88	29	59	5	4	3	7	0	73
The information is trustworthy	92	37	55	3	1	4	5	0	73
The search function (database) is useful to find the information I need	81	29	52	7	5	3	8	4	73

Panel pharmacists – consultations

All respondents who were aware of the TGA were asked about their participation in consultations. Respondents who had participated in a consultation were asked to rate the TGA's performance for various aspects of the consultation process. Given that only five panel pharmacists had participated in a consultation, follow-up rating scales are not included for this group.

Table 48. Panel pharmacists – 'In the last 12 months, have you been involved in responding to a TGA consultation document or attending a TGA consultation event (e.g. a consultative meeting, forum or workshop)?'

Response	%	N
Yes	4	5
No	96	112
Total	100	117

Table 49. Panel pharmacists – 'Was the last TGA consultation that you were involved in a public consultation?'

Response	%	N
Yes	40	2
No	40	2
Not sure	20	1
Total	100	5

Panel pharmacists – contacting the TGA

All respondents who were aware of the TGA were asked if they had contacted the TGA. Respondents who had contacted the TGA were asked about their reasons for contacting the TGA and their satisfaction with the experience.

Table 50. Panel pharmacist – 'How often do you have contact with the TGA?'

Response	%	N
More than once a week	2	2
About once a week	1	1
Two or three times a month	6	7
About once a month	21	24
About once a year	38	44
Never	33	39
Total	100	117

Table 51. Panel pharmacists – 'For which of the following reasons do you contact the TGA? Select all that apply.'

Statement	%*	N
Information about product recall(s)	67	52
Information on specific product(s)	38	30
Report, or enquire about, a problem with a medical device or medicine	29	23
Lodge an application with the TGA	12	9
To understand the regulatory process	9	7
Importing/exporting product(s)	9	7
Information about manufacturing products	8	6
Check the progress of an application with the TGA	8	6
In response to TGA service delivery	3	2
Other, please specify	1	1

*Percentage of those in contact with the TGA (N = 78).

Table 52. Panel pharmacists – 'How do you contact the TGA? Select all that apply.'

Response	%*	N
Online form	47	37
Telephone	44	34
Email	41	32
Fax	3	2
Letter	1	1
Other	1	1

*Percentage of those in contact with the TGA (N = 78).

Table 53. Panel pharmacists – 'Generally, how long does it take for the TGA to respond to your: ...'

Contact method	Immediate	<1 day	1–2 days	3–10 days	11–20 days	>20 days	N
Phone enquiry	38	35	18	6	0	3	34
Email	3	6	44	31	9	6	32
Letter	0	0	0	100	0	0	1
Fax	0	0	50	0	0	50	2
Online form	0	8	49	35	3	5	37
Other	100	0	0	0	0	0	1

Table 54. Panel pharmacists – 'Generally, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Phone enquiry	91	15	76	6	0	3	3	34
Email	69	3	66	22	3	6	9	32
Letter	0	0	0	100	0	0	0	1
Fax	0	0	0	50	0	50	50	2
Online form	70	5	65	27	0	3	3	37
Other	100	0	100	0	0	0	0	1

Table 55. Panel consumers – 'Overall, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	94	13	81	0	4	1	6	68

Panel pharmacists – the TGA website

Respondents who were aware of the TGA were asked about their use and perceptions of the TGA website. A screenshot of the TGA website homepage was included in the questionnaire.

Table 56. Panel pharmacists – 'How often do you visit the TGA website?'

Response	%	N
More than once a week	8	9
About once a week	10	12
Two or three times a month	17	20
About once a month	34	40
About once a year	23	27
Never	8	9
Total	100	117

Table 57. Panel pharmacists – 'For which reasons did you visit the TGA website in the last 12 months? Select all that apply.'

Statement	%*	N
Information about medicines shortages	62	67
Accessing information for health professionals	37	40
Product details	36	39
Safety information	34	37
Accessing information related to COVID-19	31	33
Accessing information about the scheduling of medications and poisons	28	30
Report problems and adverse events	20	22
TGA news	20	22
Education materials	19	21
Accessing TGA databases such as the ARTG	18	19
Regulatory decisions and notices	16	17
Guidance documents	15	16
Accessing information on the medicines and medical devices Reforms (MMDR)	8	9
General information about the TGA	6	7
Importing or exporting product(s) information	6	6
TGA publications, including performance reporting	5	5
Information on TGA training, workshops or presentations	4	4
Provide feedback to the TGA	4	4
Fees and charges information	4	4
Information on consultations	3	3
Accessing targeted information for small and medium enterprises (SME Assist)	1	1
Other	4	4

*Percentage of website visitors (N = 108).

Table 58. Panel pharmacists – website satisfaction items

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Language used	91	15	76	8	1	0	1	108
Navigating the site	78	11	67	17	6	0	6	108
Look and feel (colours, icons, other design)	84	14	70	13	3	0	3	108
Overall satisfaction	91	17	74	6	3	0	3	108

Panel pharmacists – information interests

All respondents (except those in the medical products industry) were asked to indicate the types of information they would be interested in receiving from the TGA.

Table 59. Panel pharmacists – 'Are you interested in information on any of the following? Select all that apply.'

Statement	%*	N
Safety information about medicines and medical devices	85	99
Product recalls	80	94
Reporting problems or side effects of medicines or medical devices	74	87
Training, workshops or presentations about medicines and medical devices	57	67
Information on traveling with medicines and medical devices	55	64
Accessing medicines and medical devices	47	55
News and publications	33	39
General information about the TGA	31	36
Information on consultations	16	19

*Percentage of total sample (N = 117).

Opt-in medical products industry results

The tables in this section of the report present results for the opt-in medical products industry sample.

- For more information about the opt-in medical products industry sample, see Sampling methods.
- For general notes about interpreting results tables, see Interpreting percentages and results tables.
- For definitions of abbreviations, see Appendix 1: Abbreviations.

Opt-in medical products industry – demographics

Opt-in medical products industry respondents were asked about their role and the size and type of business they work for.

Table 60. Opt-in medical products industry – 'Which category best describes your role in the medical products industry?'

Role	%	N
Product sponsor	56	854
Product manufacturer	31	471
Regulatory affairs consultant	10	158
Industry association representative	1	9
Other	3	41
Total	100	1533

Table 61. Opt-in medical products industry – 'How many employees work for the company in Australia?'

Role	%	N
1-19	45	590
20-199	32	426
200-599	15	191
600-999	4	49
1000-1499	2	26
1500+	2	30
Total	100	1312

Table 62. Opt-in medical products industry – 'What type of products do you sponsor? Select all that apply.'

Role	%*	N
Medical devices	64	546
Prescription meds	36	309
Over the counter meds	21	183
Complementary meds	20	175
Blood &/or Tissue products	5	39
Other	6	51

*Percentage of sponsors (N = 854).

Table 63. Opt-in medical products industry – 'What type of products do you manufacture?'

Role	%*	N
Medical devices	49	233
Complementary meds	22	103
Prescription meds	15	72
Over the counter meds	13	61
Blood &/or Tissue products	6	27
Other	15	73

*Percentage of manufacturers (N = 471).

Opt-in medical products industry – awareness of advertising obligations

Selected stakeholder groups, including health professional and medical products industry respondents, were asked if they advertise therapeutic goods. Advertisers were then asked about their awareness of therapeutic goods advertising rules and the consequences for breaking them.

Table 64. Opt-in medical products industry – 'Do you advertise or arrange the advertising of therapeutic goods?'

Response	%	N
Yes	38	576
No	62	934
Total	100	1510

Table 65. Opt-in medical products industry – 'Are you aware that there are specific rules for advertising therapeutic goods in Australia?'

Response	%	N
Yes	97	549
No	3	17
Total	100	566

Table 66. Opt-in medical products industry – 'Are you aware that there are potentially serious consequences for breaking the therapeutic goods advertising rules in Australia, such as fines or court action?'

Response	%	N
Yes	98	552
No	2	13
Total	100	565

Opt-in medical products industry – TGA performance

All respondents who were aware of the TGA were asked to indicate their level of agreement with a set of items about the TGA's performance.

Table 67. Opt-in medical products industry – TGA performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Balance right – safety vs access	73	23	50	12	8	3	11	4	1453
I trust the TGA – ethics and integrity	88	48	39	7	3	2	5	1	1456
Takes strong action – advertising	66	31	35	14	7	2	9	11	1456
Takes strong action – general	70	33	36	13	7	2	9	9	1454
Responded effectively to COVID-19	67	29	38	15	3	2	5	12	1453
Provides input opportunities	56	16	41	22	9	5	14	8	1453
Listens to feedback	52	15	37	26	9	5	14	9	1457
Is collaborative	60	20	40	20	10	5	15	6	1456

Opt-in medical products industry – consultations

All respondents who were aware of the TGA were asked about their participation in consultations. Respondents who had participated in a consultation were asked to rate the TGA's performance for various aspects of the consultation process.

Table 68. Opt-in medical products industry – 'In the last 12 months, have you been involved in responding to a TGA consultation document or attending a TGA consultation event (e.g. a consultative meeting, forum or workshop)?'

Response	%	N
Yes	31	447
No	69	999
Total	100	1446

Table 69. Opt-in medical products industry – 'Was the last TGA consultation that you were involved in a public consultation?'

Response	%	N
Yes	59	263
No	28	126
Not sure	12	55
Total	100	444

Table 70. Opt-in medical products industry – consultation performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/TE	N
Did enough to notify participants	72	20	52	15	6	3	9	4	440
Process made it easy to participate	78	23	55	14	5	1	6	2	440
Materials were easy to understand	75	22	53	12	8	2	10	3	440
Input timeframes were long enough	67	16	51	14	11	4	15	4	439
Genuinely considered input	50	14	35	22	8	5	13	15	438
Clearly explained the outcome	51	15	36	19	9	3	13	17	440

Table 71. Opt-in medical products industry – 'Overall, how satisfied were you with the consultation process?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	64	9	55	24	9	3	12	439

Opt-in medical products industry – contacting the TGA

All respondents who were aware of the TGA were asked if they had contacted the TGA. Respondents who had contacted the TGA were asked about their reasons for contacting the TGA and their satisfaction with the experience.

Table 72. Opt-in medical products industry – 'How often do you have contact with the TGA?'

Response	%	N
More than once a week	8	110
About once a week	9	133
Two or three times a month	14	197
About once a month	30	430
About once a year	34	482
Never	5	72
Total	100	1424

Table 73. Opt-in medical products industry – 'For which of the following reasons do you contact the TGA? Select all that apply.'

Statement	%*	N
Lodge an application with the TGA	67	900
Check the progress of an application with the TGA	49	667
To understand the regulatory process	47	634
Information about manufacturing products	24	330
Information on specific product(s)	23	307
Report, or enquire about, a problem with a medical device or medicine	20	267
Importing/exporting product(s)	18	238
Information about product recall(s)	11	152
In response to TGA service delivery	11	150
Other	8	103

*Percentage of those in contact with the TGA (N = 1351).

Table 74. Opt-in medical products industry– 'How do you contact the TGA? Select all that apply.'

Response	%*	N
Telephone	55	739
Email	88	1193
Letter	3	44
Fax	<1	1
Online form	31	424
Other	3	40

*Percentage of those in contact with the TGA (N = 1351).

Table 75. Opt-in medical products industry – 'Generally, how long does it take for the TGA to respond to your: ...'

Contact method	Immediate	<1 day	1–2 days	3–10 days	11–20 days	>20 days	N
Phone enquiry	25	27	28	16	2	2	724
Email	1	11	37	40	5	5	1163
Letter	2	0	12	52	14	19	42
Online form	3	12	31	41	6	6	389
Other	29	6	10	35	6	13	31

Note for Table 75. The single respondent who contacted via fax did not provide an answer to this question.

Table 76. Opt-in medical products industry – 'Generally, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Phone enquiry	73	23	50	16	8	4	12	732
Email	70	18	52	19	9	3	12	1174
Letter	59	7	52	23	9	9	18	44
Online form	67	14	53	22	7	4	11	401
Enquiry method	58	22	36	31	6	6	11	36

Table 77. Opt-in medical products industry – 'Overall, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	72	16	55	18	8	3	11	1326

Opt-in medical products industry – the TGA website

Respondents in the opt-in medical products industry were asked about their use and perception of both the TGA website and the TGA Business Services (TBS) portal. Screenshots of the TGA website homepage and the TBS login page were included in the questionnaire.

Table 78. Opt-in medical products industry – 'How often do you visit the TGA website?'

Response	%	N
More than once a week	30	417
About once a week	11	156
Two or three times a month	13	179
About once a month	23	324
About once a year	9	128
Never	14	201
Total	100	1405

Table 79. Opt-in medical products industry – 'For which reasons did you visit the TGA website in the last 12 months? Select all that apply.'

Statement	%*	N
Guidance documents	75	901
Accessing TGA databases such as the ARTG	73	881
Fees and charges information	55	664
Regulatory decisions and notices	51	619
Product details	44	528
TGA news	43	522
General information about the TGA	36	428
Information on TGA training, workshops or presentations	33	397
Accessing information related to COVID-19	30	367
Education materials	28	336
Importing or exporting product(s) information	27	322
TGA publications, including performance reporting	25	300
Information on consultations	24	289
Accessing information about the scheduling of medications and poisons	22	267
Safety information	22	263
Accessing information on the medicines and medical devices Reforms (MMDR)	14	214
Report problems and adverse events	13	173
Information about medicines shortages	13	157
Accessing targeted information for small and medium enterprises (SME Assist)	12	142
Accessing information for health professionals	10	115
Provide feedback to the TGA	7	90
Other	2	30

*Percentage of respondents who visited the website (N = 1204).

Table 80. Opt-in medical products industry – website satisfaction items

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Language used	86	19	66	11	3	1	3	1193
Navigating the site	60	10	51	22	14	3	17	1192
Look and feel (colours, icons, other design)	73	13	60	23	3	1	4	1189
Overall satisfaction	75	10	65	17	6	1	8	1191

Opt-in medical products industry – the TBS portal

Respondents in the opt-in medical products industry were asked about their use and perception of both the TGA website and the TGA Business Services (TBS) portal. Screenshots of the TGA website homepage and the TBS login page were included in the questionnaire.

Table 81. Opt-in medical products industry – 'How often do you visit the TGA Business Services website?'

Response	%	N
More than once a week	25	345
About once a week	8	108
Two or three times a month	11	147
About once a month	19	259
About once a year	14	196
Not visited	25	344
Total	100	1399

Table 82. Opt-in medical products industry – 'For which reasons did you visit the TGA Business Services website in the last 12 months?'

Statement	%	N
Lodge an application(s)	75	791
Check the progress of an application	63	661
Vary or modify an application	47	501
Fees and charges information	46	481
Pay a bill or fee	36	383
Update my organisation's details	33	348
Register with the TGA	32	335
Other, please specify	7	75

*Percentage of TBS website visitors (N = 1055).

Table 83. Opt-in medical products industry – 'How satisfied are you with the TGA Business Services website?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	74	14	60	16	9	1	10	1045

Opt-in medical products industry – SME Assist

Medical products industry respondents were asked about their awareness of the SME Assist services. A screenshot of the SME Assist portal was included in the questionnaire.

Table 84. Opt-in medical products industry – 'Are you aware of the TGA's SME Assist service which contains targeted information to support small and medium enterprises?'

Response	%	N
Yes	44	417
No	45	428
Not sure	10	99
Total	100	944

Table 85. Opt-in medical products industry – 'Have you accessed the SME Assist portal on the TGA website or attended an SME Assist event (e.g. a workshop or webinar)?'

Statement	%*	N
Accessed the SME Assist portal on the TGA website	44	184
Attended an SME Assist event (e.g. a workshop or webinar)	18	74
None of the above	41	169
Not sure	4	18

*Percentage of those aware of SME Assist (N = 417).

Table 86. Opt-in medical products industry – 'I find the information in SME assist to be ….'

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Targeted	53	12	41	20	5	1	6	21	402
Useful	55	13	42	19	6	1	0	19	398

Opt-in consumer results

The tables in this section of the report present results for the opt-in consumer sample.

- For more information about the opt-in consumer sample, see Sampling methods.
- For general notes about interpreting results tables, see Interpreting percentages and results tables.
- For definitions of abbreviations, see Appendix 1: Abbreviations.

Opt-in consumers – demographics

Consumer respondents were asked basic demographic questions, including gender, age, state and region.

Table 87. Opt-in consumers – 'What is your gender?'

Gender	%	N
Female	65	74
Male	32	37
Indeterminate/Intersex/Unspecified	0	0
Prefer not to say	3	3
Total	100	114

Table 88. Opt-in consumers – 'What is your age?'

Age	%	N
18 - 24	5	5
25 - 34	9	10
35 - 44	15	17
45 - 54	21	23
55 - 64	27	30
65 - 74	17	19
75 or older	6	7
Total	100	111

Table 89. Opt-in consumers – 'In which state or territory do you live?'

State	%	N
NSW	29	38
VIC	22	29
QLD	18	23
SA	8	10
WA	15	19
TAS	3	4
ACT	5	6
NT	1	1
Total	100	130

Table 90. Opt-in consumers – 'Where do you live?'

Region	%	N
Capital city	55	61
Regional city/town	33	36
Regional/Rural area	10	11
Remote area	2	2
Total	100	110

Opt-in consumers – use and experience of medicines and medical devices

Consumer respondents were asked about their use and experience of medicines and medical devices.

Table 91. Opt-in consumers – 'Which of the following statements are true for you? Select all that apply.'

Category	%*	N
I take regular medications, such as pain medications, oral birth control or blood pressure medication	45	52
I use complementary medicines, such as vitamins	41	47
I have experienced side effects with a medicine	32	37
I have experienced problems with a medical device	29	34
I use medical devices, such as a pacemaker, hip joint replacement, or Epipen	13	15
I have experienced difficulty obtaining my usual medication in the past 12 months	11	13
None of the above	15	17
Prefer not to answer	1	1

*Percentage of total sample (N = 116).

Opt-in consumers – awareness of the TGA

All respondents (except those in the medical products industry) were asked about their awareness of the TGA.

Table 92. Opt-in consumers – 'Had you heard of the Therapeutic Goods Administration (TGA) prior to participating in this survey?'

Response	%	N
Yes	89	95
No	11	12
Total	100	107

Opt-in consumers – understanding of TGA regulatory scope

All respondents (except those in the medical products industry) were asked about what they think the TGA regulates.

Table 93. Opt-in consumers – 'What does the TGA regulate? Select all that apply.'

Statement	%*	N
Medicines prescribed by a doctor **(correct)**	53	62
Advertising of medicines and medical devices **(correct)**	51	59
Medicines available in supermarkets **(correct)**	38	44
Any medicines available in a pharmacy **(correct)**	49	57
Medical devices, such as bandages and pacemakers **(correct)**	45	52
Cosmetics **(incorrect)**	5	6
Foods **(incorrect)**	4	5
Health professionals (e.g. Doctors, Nurses) **(incorrect)**	4	5
Allied health professionals (e.g. Physiotherapists) **(incorrect)**	6	7
Medical procedures (e.g. scans, tests, surgery) **(incorrect)**	12	14
Veterinary medicines **(incorrect)**	0	0
All of the above **(incorrect)**	28	32

*Percentage of total sample (N = 116).

Opt-in consumers – TGA performance

All respondents who were aware of the TGA were asked to indicate their level of agreement with a set of items about the TGA's performance.

Table 94. Opt-in consumer – TGA performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Balance right – safety vs access	32	12	20	17	26	20	46	5	92
I trust the TGA – ethics and integrity	44	13	31	15	22	13	35	5	91
Takes strong action – advertising	38	16	22	18	19	19	38	7	90
Takes strong action – general	33	17	16	22	19	17	36	9	89
Responded effectively to COVID-19	31	9	22	38	6	6	11	20	90
Provides input opportunities	23	3	20	29	18	20	38	10	90
Listens to feedback	20	2	18	28	20	16	36	17	90
Is collaborative	21	3	18	28	17	14	31	20	90

Opt-in consumers – perceptions of medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medicines. The perceptions of medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medicines (including prescription and non-prescription)** that are available in Australia. Please note: **Medicines do not include complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products). Please indicate your level of agreement with each statement.

Table 95. Opt-in consumers – perceptions of medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medicines - appropriately regulated	51	14	37	15	20	8	28	6	105
Medicines manufactured to a high standard	56	16	41	16	16	3	19	9	101
Trust medicines in pharmacies	53	13	41	23	15	6	21	3	101
Trust medicines in supermarkets	35	8	27	29	24	8	32	4	103
Confident medicines I buy are genuine	61	13	48	15	13	5	18	7	102
Confident government monitors medicine safety issues	51	14	38	18	17	11	28	2	103
Risk of medicines balanced against positive impact	49	13	37	20	20	5	25	6	104

Opt-in consumers – perceptions of complementary medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of complementary medicines. The perceptions of complementary medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products) that are available in Australia. Please indicate your level of agreement with each statement.

Table 96. Opt-in consumers – perceptions of complementary medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Complementary medicines - appropriately regulated	17	3	14	24	18	30	49	11	103
Complementary medicines - manufactured to a high standard	19	4	16	29	18	21	40	12	103
Confident government monitors complementary medicine safety issues	24	5	19	22	25	25	49	6	102

Opt-in consumers – perceptions of medical devices

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medical devices. The perceptions of medical devices items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medical devices** that are available in Australia. Medical devices include a wide range of products, such as medical gloves, bandages, neck braces, condoms, pregnancy tests, implants and X-ray equipment. Please indicate your level of agreement with each statement.

Table 97. Opt-in consumers – perceptions of medical devices items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medical devices - appropriately regulated	28	5	23	14	20	25	45	13	104
Medical devices manufactured to a high standard	29	4	25	19	18	21	40	12	103
Confident medical devices I use are genuine	38	8	30	20	13	20	32	10	102
Confident government monitors medical device safety issues	32	4	28	17	17	27	44	7	103
Risk of medical devices balanced against positive impact	29	5	25	16	25	21	45	10	102

Opt-in consumers – perceptions of medicine shortages information

Selected stakeholder groups, including consumers and health professionals, were asked about their awareness and perceptions of the TGA's role in monitoring and managing medicine shortages. A screenshot of the medicine shortages page on the TGA website was included in the questionnaire.

Table 98. Opt-in consumers – 'Are you aware that the TGA monitors and manages medicine shortages in Australia?'

Response	%	N
Yes	51	46
No	25	23
Not sure	24	22
Total	100	91

Table 99. Opt-in consumers – 'Are you aware that the TGA monitors and manages medicine shortages in Australia?'

Response	%	N
Yes	29	13
No	69	31
Not sure	2	1
Total	100	45

Table 100. Opt-in consumers – perceptions of the medicine shortages information on the TGA website

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/NS	N
The information is helpful	85	31	54	0	15	0	15	0	13
The information is trustworthy	69	31	38	23	0	0	0	8	13
The search function (database) is useful to find the information I need	69	15	54	8	15	0	15	8	13

Opt-in consumers – consultations

All respondents who were aware of the TGA were asked about their participation in consultations. Respondents who had participated in a consultation were asked to rate the TGA's performance for various aspects of the consultation process. Given that only seven opt-in consumers had participated in a consultation, follow-up rating scales are not included for this group.

Table 101. Opt-in consumers – 'In the last 12 months, have you been involved in responding to a TGA consultation document or attending a TGA consultation event (e.g. a consultative meeting, forum or workshop)?'

Response	%	N
Yes	8	7
No	92	85
Total	100	92

Table 102. Opt-in consumers – 'Was the last TGA consultation that you were involved in a public consultation?'

Response	%	N
Yes	71	5
No	29	5
Not sure	0	0
Total	100	7

Opt-in consumers – contacting the TGA

All respondents who were aware of the TGA were asked if they had contacted the TGA. Respondents who had contacted the TGA were asked about their reasons for contacting the TGA and their satisfaction with the experience.

Table 103. Opt-in consumer – 'How often do you have contact with the TGA?'

Response	%	N
More than once a week	1	1
About once a week	2	2
Two or three times a month	4	4
About once a month	8	7
About once a year	21	19
Never	63	57
Total	100	90

Table 104. Opt-in consumers – 'For which of the following reasons do you contact the TGA? Select all that apply.'

Statement	%*	N
Report, or enquire about, a problem with a medical device or medicine	48	16
Information on specific product(s)	39	13
To understand the regulatory process	39	13
Lodge an application with the TGA	36	12
Information about manufacturing products	33	11
Information about product recall(s)	33	11
Check the progress of an application with the TGA	15	5
Importing/exporting product(s)	15	5
In response to TGA service delivery	3	1
Other	3	1

*Percentage of those in contact with the TGA (N = 33).

Table 105. Panel consumers – 'How do you contact the TGA? Select all that apply.'

Response	%*	N
Telephone	33	11
Email	54	18
Letter	3	1
Fax	0	0
Online form	52	17
Other	3	1

*Percentage of those in contact with the TGA (N = 33).

Table 106. Opt-in consumers – 'Generally, how long does it take for the TGA to respond to your: …'

Contact method	Immediate	<1 day	1–2 days	3–10 days	11–20 days	>20 days	N
Phone enquiry	18	36	27	9	0	9	11
Email	0	11	17	56	0	17	18
Online form	6	6	25	38	13	13	16

Note for Table 106. Fax (N = 0), letter (N =1) and other (N =1) enquiry methods are not included in this table.

Table 107. Opt-in consumers – 'Generally, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Phone enquiry	64	9	55	9	27	0	27	11
Email	56	11	44	17	6	22	28	18
Online form	31	6	25	44	19	6	25	16

Table 108. Opt-in consumers – 'Overall, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	45	19	26	19	13	23	35	31

Opt-in consumers – the TGA website

Respondents who were aware of the TGA were asked about their use and perceptions of the TGA website. A screenshot of the TGA website homepage was included in the questionnaire.

Table 109. Opt-in consumers – 'How often do you visit the TGA website?'

Response	%	N
More than once a week	10	10
About once a week	4	4
Two or three times a month	0	0
About once a month	16	16
About once a year	29	30
Never	42	43
Total	100	103

Table 110. Opt-in consumers– 'For which reasons did you visit the TGA website in the last 12 months? Select all that apply.'

Statement	%*	N
Product details	48	29
Accessing TGA databases such as the ARTG	28	17
General information about the TGA	28	17
Safety information	28	17
Regulatory decisions and notices	25	15
Report problems and adverse events	25	15
Accessing information on the medicines and medical devices Reforms (MMDR)	22	13
TGA publications, including performance reporting	22	13
Accessing information related to COVID-19	17	10
Guidance documents	17	10
TGA news	17	10
Information about medicines shortages	17	10
Accessing information about the scheduling of medications and poisons	15	9
Education materials	15	9
Importing or exporting product(s) information	15	9
Fees and charges information	12	7
Information on consultations	8	5
Provide feedback to the TGA	8	5
Information on TGA training, workshops or presentations	8	5
Accessing information for health professionals	3	2
Accessing targeted information for small and medium enterprises (SME Assist)	0	0
Other	3	2

*Percentage of website visitors (N = 60).

Table 111. Opt-in consumers – website satisfaction items

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Language used	64	7	58	29	7	0	7	59
Navigating the site	54	11	43	25	18	4	21	56
Look and feel (colours, icons, other design)	54	11	43	38	9	0	9	56
Overall satisfaction	52	11	41	36	13	0	13	56

Opt-in consumers – information interests

All respondents (except those in the medical products industry) were asked to indicate the types of information they would be interested in receiving from the TGA.

Table 112. Opt-in consumers – 'Are you interested in information on any of the following? Select all that apply.'

Statement	%*	N
Safety information about medicines and medical devices	64	74
Reporting problems or side effects of medicines or medical devices	63	73
Product recalls	59	69
Accessing medicines and medical devices	31	36
Information on traveling with medicines and medical devices	31	36
General information about the TGA	27	31
Training, workshops or presentations about medicines and medical devices	25	29
News and publications	24	28
Information on consultations	22	26

*Percentage of total sample (N = 116).

Opt-in health professional results

The tables in this section of the report present results for the opt-in health professional sample.

- For more information about the opt-in health professional sample, see Sampling methods.
- For general notes about interpreting results tables, see Interpreting percentages and results tables.
- For definitions of abbreviations, see Appendix 1: Abbreviations.

Opt-in health professionals – demographics

Opt-in health professional respondents were asked to provide more information about their role.

Table 113. Opt-in health professionals – 'Which category best describes your role as a health professional?'

Role	%	N
Pharmacist	15	23
Medical practitioner	20	32
Nurse	9	14
Complementary healthcare practitioner	8	13
Dental practitioner	6	10
Other	41	65

Opt-in health professionals – awareness of the TGA

All respondents (except those in the medical products industry) were asked about their awareness of the TGA.

Table 114. Opt-in health professionals – 'Had you heard of the Therapeutic Goods Administration (TGA) prior to participating in this survey?'

Response	%	N
Yes	97	149
No	3	4
Total	100	153

Opt-in health professionals – understanding of TGA regulatory scope

All respondents (except those in the medical products industry) were asked about what they think the TGA regulates.

Table 115. Opt-in health professionals – 'What does the TGA regulate? Select all that apply.'

Statement	%*	N
Medical devices, such as bandages and pacemakers **(correct)**	70	111
Medicines prescribed by a doctor **(correct)**	68	107
Any medicines available in a pharmacy **(correct)**	65	102
Advertising of medicines and medical devices **(correct)**	57	90
Medicines available in supermarkets **(correct)**	57	90
Veterinary medicines **(incorrect)**	28	44
Medical procedures (e.g. scans, tests, surgery) **(incorrect)**	23	37
Cosmetics **(incorrect)**	13	21
Foods **(incorrect)**	5	8
Allied health professionals (e.g. Physiotherapists) **(incorrect)**	3	5
Health professionals (e.g. Doctors, Nurses) **(incorrect)**	2	3
All of the above **(incorrect)**	21	33

*Percentage of total sample (N = 158).

Opt-in health professionals – awareness of advertising obligations

Selected stakeholder groups, including health professional and medical products industry respondents, were asked if they advertise therapeutic goods. Advertisers were then asked about their awareness of therapeutic goods advertising rules and the consequences for breaking them.

Table 116. Opt-in health professionals – 'Do you advertise or arrange the advertising of therapeutic goods?'

Response	%	N
Yes	17	26
No	83	129
Total	100	155

Table 117. Opt-in health professionals – 'Are you aware that there are specific rules for advertising therapeutic goods in Australia?'

Response	%	N
Yes	96	24
No	4	1
Total	100	25

Table 118. Opt-in health professionals – 'Are you aware that there are potentially serious consequences for breaking the therapeutic goods advertising rules in Australia, such as fines or court action?'

Response	%	N
Yes	96	25
No	4	1
Total	100	26

Opt-in health professionals – TGA performance

All respondents who were aware of the TGA were asked to indicate their level of agreement with a set of items about the TGA's performance.

Table 119. Opt-in health professionals – TGA performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Balance right – safety vs access	60	12	48	14	17	4	21	5	145
I trust the TGA – ethics and integrity	83	36	47	9	6	1	8	1	145
Takes strong action – advertising	54	18	37	12	12	6	18	15	145
Takes strong action – general	57	23	34	12	10	6	15	16	145
Responded effectively to COVID-19	49	15	33	25	4	4	8	18	144
Provides input opportunities	37	10	28	22	20	6	26	15	145
Listens to feedback	38	10	28	21	11	6	17	24	145
Is collaborative	46	11	35	22	11	5	16	16	143

Opt-in health professionals – perceptions of medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medicines. The perceptions of medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medicines (including prescription and non-prescription)** that are available in Australia. Please note: **Medicines do not include complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products). Please indicate your level of agreement with each statement.

Table 120. Opt-in health professionals – perceptions of medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medicines - appropriately regulated	83	21	62	8	3	1	4	5	149
Medicines manufactured to a high standard	85	34	51	8	0	1	1	6	149
Trust medicines in pharmacies	90	36	54	6	3	1	3	1	149
Trust medicines in supermarkets	62	19	43	23	11	1	12	3	149
Confident medicines I buy are genuine	89	30	59	7	2	1	3	1	148
Confident government monitors medicine safety issues	88	28	60	5	3	1	4	3	149
Risk of medicines balanced against positive impact	81	30	51	8	6	1	7	5	149

Opt-in health professionals – perceptions of complementary medicines

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of complementary medicines. The perceptions of complementary medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products) that are available in Australia. Please indicate your level of agreement with each statement.

Table 121. Opt-in health professionals – perceptions of complementary medicines items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Complementary medicines - appropriately regulated	22	3	18	22	31	13	44	12	148
Complementary medicines - manufactured to a high standard	23	5	18	26	17	16	33	18	147
Confident government monitors complementary medicine safety issues	31	7	24	22	22	13	34	12	148

Opt-in health professionals – perceptions of medical devices

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medical devices. The perceptions of medical devices items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medical devices** that are available in Australia. Medical devices include a wide range of products, such as medical gloves, bandages, neck braces, condoms, pregnancy tests, implants and X-ray equipment. Please indicate your level of agreement with each statement.

Table 122. Opt-in health professionals – perceptions of medical devices items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NS	N
Medical devices - appropriately regulated	70	16	53	13	7	3	11	7	147
Medical devices manufactured to a high standard	74	20	54	12	3	2	5	8	148
Confident medical devices I use are genuine	77	22	55	12	2	2	4	7	146
Confident government monitors medical device safety issues	73	18	55	13	3	4	7	7	148
Risk of medical devices balanced against positive impact	66	18	49	16	4	3	7	11	148

Opt-in health professionals – perceptions of medicine shortages information

Selected stakeholder groups, including consumers and health professionals, were asked about their awareness and perceptions of the TGA's role in monitoring and managing medicine shortages. A screenshot of the medicine shortages page on the TGA website was included in the questionnaire.

Table 123. Opt-in health professionals – 'Are you aware that the TGA monitors and manages medicine shortages in Australia?'

Response	%	N
Yes	53	76
No	34	49
Not sure	13	18
Total	100	143

Table 124. Opt-in health professionals – 'Have you accessed information about medicine shortages on the TGA website?'

Response	%	N
Yes	32	24
No	68	51
Not sure	0	0
Total	100	75

Table 125. Opt-in health professionals – perceptions of the medicine shortages information on the TGA website

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/NS	N
The information is helpful	100	22	79	0	0	0	0	0	23
The information is trustworthy	87	26	61	9	0	4	4	0	23
The search function (database) is useful to find the information I need	65	13	52	26	9	0	9	0	23

Opt-in health professionals – consultations

All respondents who were aware of the TGA were asked about their participation in consultations. Respondents who had participated in a consultation were asked to rate the TGA's performance for various aspects of the consultation process.

Table 126. Opt-in health professionals – 'In the last 12 months, have you been involved in responding to a TGA consultation document or attending a TGA consultation event (e.g. a consultative meeting, forum or workshop)?'

Response	%	N
Yes	22	32
No	78	111
Total	100	143

Table 127. Opt-in health professionals – 'Was the last TGA consultation that you were involved in a public consultation?'

Response	%	N
Yes	44	18
No	44	14
Not sure	13	4
Total	100	32

Table 128. Opt-in health professionals – consultation performance items

Statement	Nett A	SA	A	Neither	D	SD	Nett D	NA/TE	N
Did enough to notify participants	66	16	50	16	9	0	9	9	32
Process made it easy to participate	66	19	47	19	9	0	9	6	32
Materials were easy to understand	66	13	53	19	6	0	6	9	32
Input timeframes were long enough	55	13	42	19	13	0	13	13	31
Genuinely considered input	50	16	34	25	6	3	9	16	32
Clearly explained the outcome	50	13	38	19	13	3	16	16	32

Opt-in health professionals – contacting the TGA

All respondents who were aware of the TGA were asked if they had contacted the TGA. Respondents who had contacted the TGA were asked about their reasons for contacting the TGA and their satisfaction with the experience.

Table 129. Opt-in health professionals – 'How often do you have contact with the TGA?'

Response	%	N
More than once a week	1	1
About once a week	3	4
Two or three times a month	5	7
About once a month	21	30
About once a year	53	75
Never	17	24
Total	100	141

Table 130. Opt-in health professionals – 'For which of the following reasons do you contact the TGA? Select all that apply.'

Statement	%*	N
Lodge an application with the TGA	51	60
Check the progress of an application with the TGA	32	38
Information on specific product(s)	25	29
To understand the regulatory process	24	28
Information about manufacturing products	17	20
Report, or enquire about, a problem with a medical device or medicine	15	17
Importing/exporting product(s)	15	18
Information about product recall(s)	11	13
In response to TGA service delivery	9	11
Other	9	11

*Percentage of those in contact with the TGA (N =117).

Table 131. Opt-in health professionals – 'How do you contact the TGA? Select all that apply.'

Response	%*	N
Telephone	35	41
Email	77	90
Letter	2	2
Fax	1	1
Online form	32	38
Other	3	4

*Percentage of those in contact with the TGA (N = 117).

Table 132. Opt-in health professionals – 'Generally, how long does it take for the TGA to respond to your: …'

Contact method	Immediate	<1 day	1–2 days	3–10 days	11–20 days	>20 days	N
Phone enquiry	28	36	15	15	3	3	39
Email	4	11	44	28	4	11	85
Online form	0	8	43	38	3	8	37

Note for Table 132. Letter (N = 2), fax (N = 1) and other (N = 4) enquiry methods are not included in this table.

Table 133. Opt-in health professionals – 'Generally, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Phone enquiry	73	28	45	10	5	13	18	40
Email	68	16	52	16	9	7	16	87
Enquiry via online form	76	8	68	14	3	8	11	37

Table 134. Opt-in health professionals – 'Overall, how satisfied are you with the experience of communicating with the TGA?'

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Overall satisfaction	73	14	59	15	9	4	12	114

Opt-in health professionals – the TGA website

Respondents who were aware of the TGA were asked about their use and perceptions of the TGA website. A screenshot of the TGA website homepage was included in the questionnaire.

Table 135. Opt-in health professionals – 'How often do you visit the TGA website?'

Response	%	N
More than once a week	6	9
About once a week	4	6
Two or three times a month	7	10
About once a month	35	51
About once a year	40	58
Never	8	11
Total	100	145

Table 136. Opt-in health professionals – 'For which reasons did you visit the TGA website in the last 12 months? Select all that apply.'

Statement	%*	N
Accessing TGA databases such as the ARTG	45	60
Guidance documents	37	50
Accessing information for health professionals	30	40
Regulatory decisions and notices	29	39
Product details	28	37
Fees and charges information	25	33
Accessing information related to COVID-19	19	26
Education materials	15	20
General information about the TGA	14	19
Importing or exporting product(s) information	14	19
Accessing information about the scheduling of medications and poisons	13	18
Safety information	13	17
TGA news	12	16
Information about medicines shortages	12	16
TGA publications, including performance reporting	10	13
Report problems and adverse events	10	13
Information on consultations	8	11
Accessing information on the medicines and medical devices Reforms (MMDR)	7	9
Provide feedback to the TGA	7	9
Information on TGA training, workshops or presentations	6	8
Accessing targeted information for small and medium enterprises (SME Assist)	4	5
Other	10	14

*Percentage of website visitors (N = 134).

Table 137. Opt-in health professionals – website satisfaction items

Statement	Nett S	VS	S	Neither	D	VD	Nett D	N
Language used	79	12	67	15	5	2	6	132
Navigating the site	57	7	50	25	14	4	18	132
Look and feel (colours, icons, other design)	61	8	52	34	3	2	5	132
Overall satisfaction	66	8	57	24	8	2	10	131

Opt-in health professionals – information interests

All respondents (except those in the medical products industry) were asked to indicate the types of information they would be interested in receiving from the TGA.

Table 138. Opt-in health professionals – 'Are you interested in information on any of the following? Select all that apply.'

Statement	%*	N
Safety information about medicines and medical devices	48	76
Product recalls	46	72
Reporting problems or side effects of medicines or medical devices	45	71
Training, workshops or presentations about medicines and medical devices	38	60
Accessing medicines and medical devices	27	42
General information about the TGA	25	39
Information on traveling with medicines and medical devices	22	35
News and publications	22	35
Information on consultations	20	31

*Percentage of total sample (N = 158).

Appendix 1: Abbreviations

Column heading abbreviations in results tables

Multiple selection questions

Table 139. Abbreviations for multiple selection results tables.

Abbreviation	Definition
N	The number of people who selected a response option

Agreement scales

Table 140. Abbreviations for agreement scale results tables.

Abbreviation	Definition
N	The number of people who responded to an item.
A	The percentage of N who **agreed.**
SA	The percentage of N who **strongly agreed**.
Nett A	The percentage of N who **agreed or strongly agreed.**
Neither	The percentage of N who **neither agreed nor disagreed.**
D	The percentage of N who **disagreed.**
SD	The percentage of N who **strongly disagreed.**
Nett D	The percentage of N who **disagreed or strongly disagreed.**
NA	**Not applicable**
NS	**Not sure**
TE	**Too early to say**

Satisfaction scales

Table 141. Abbreviations for satisfaction scale results tables.

Abbreviation	Definition
N	The number of people who responded to an item.
S	The percentage of N who were **satisfied**.
VS	The percentage of N who were **very satisfied.**
Nett S	The percentage of N who were **satisfied or very satisfied.**
Neither	The percentage of N who were **neither satisfied nor dissatisfied.**
D	The percentage of N who **dissatisfied.**
VD	The percentage of N who were **very dissatisfied.**
Nett D	The percentage of N who were **dissatisfied or very dissatisfied.**

Abbreviated item wording in results tables

TGA performance items

We asked the TGA performance items to respondents from the medical products industry and all other respondents who had heard of the TGA before participating in the survey.

Table 142. Abbreviations for TGA performance items.

Abbreviated item wording	Full item wording
Balance right – safety vs access	The TGA gets the balance right between safety for consumers and access to products
I trust the TGA – ethics and integrity	I trust the TGA to perform its role ethically and with integrity
Takes strong action – advertising	The TGA takes strong action against illegal advertising for health products
Takes strong action – general	The TGA takes strong action against illegal behaviour
Responded effectively to COVID-19	The TGA has responded effectively to the COVID-19 pandemic
Provides input opportunities	The TGA provides opportunities for me to input into key decisions that impact me
Listens to feedback	The TGA listens to feedback
Is collaborative	The TGA is collaborative

Perceptions of medicines items

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medicines. The perceptions of medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medicines (including prescription and non-prescription)** that are available in Australia. Please note: **Medicines do not include complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products). Please indicate your level of agreement with each statement.

Table 143. Abbreviations for perceptions of medicines items.

Abbreviated item wording	Full item wording
Medicines - appropriately regulated	Medicines are appropriately regulated
Medicines manufactured to a high standard	Medicines are manufactured to a high standard
Trust medicines in pharmacies	I trust medicines available in pharmacies
Trust medicines in supermarkets	I trust medicines available in supermarkets
Confident medicines I use are genuine	I am confident that the medicines I use are genuine
Confident government monitors medicine safety issues	I am confident that the government monitors medicines to identify safety issues
Risk of medicines balanced against positive impact	I believe that the risks of medicines are balanced against their positive impact

Perceptions of complementary medicines items

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of complementary medicines. The perceptions of complementary medicines items were prefaced with the following instructions and definitions:

> Shown below are some statements about **complementary medicines** (such as vitamins, minerals, herbal or aromatherapy products) that are available in Australia. Please indicate your level of agreement with each statement.

Table 144. Abbreviations for perceptions of complementary medicines items.

Abbreviated item wording	Full item wording
Complementary medicines - appropriately regulated	Complementary medicines are appropriately regulated
Complementary medicines - manufactured to a high standard	Complementary medicines are manufactured to a high standard
Confident government monitors complementary medicine safety issues	I am confident the government monitors complementary medicines to identify safety issues

Perceptions of medical devices items

Respondents in all stakeholder groups (except the medical products industry) were asked about their perceptions of medical devices. The perceptions of medical devices items were prefaced with the following instructions and definitions:

> Shown below are some statements about **medical devices** that are available in Australia. Medical devices include a wide range of products, such as medical gloves, bandages, neck braces, condoms, pregnancy tests, implants and X-ray equipment. Please indicate your level of agreement with each statement.

Table 145. Abbreviations for perceptions of medical devices items

Abbreviated item wording	Full item wording
Medical devices - appropriately regulated	Medical devices are appropriately regulated
Medical devices manufactured to a high standard	Medical devices are manufactured to a high standard
Confident medical devices I use are genuine	I am confident that the medical devices I use are genuine
Confident government monitors medical device safety issues	I am confident that the government monitors medical devices to identify safety issues
Risk of medical devices balanced against positive impact	I believe that the risks of medical devices are balanced against their positive impact

Consultation performance items

Respondents who had been involved in responding to a TGA consultation document or attending a TGA consultation event (e.g. a consultative meeting, forum or workshop) in the last 12 months were asked about their perceptions of the consultation process.

Table 146. Abbreviations for consultation performance items

Abbreviated item wording	Full item wording
Did enough to notify participants	The TGA did enough to notify affected people of the chance to participate
Process made it easy to participate	The consultation process made it as easy as possible for me to participate
Materials were easy to understand	Consultation materials, such as papers or presentations, were easy to understand
Input timeframes were long enough	The timeframes for providing input were long enough
Genuinely considered input	The TGA genuinely considered participant input
Clearly explained the outcome	The TGA clearly explained the reasons for the final outcome

Version history

Version	Description of change	Author	Effective date
V1.0	Original publication	Regulatory Education Section and Market Research Unit	December 2020
V1.1	Correction to a typographical error in Table 7: ‘Advertising of medicines and medical devices’ is a ‘correct’ response.	Regulatory Education Section	February 2021

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