

# Survey Analysis Report

## Background

To support further innovation, social and economic developments in Hong Kong, Hong Kong Jockey Club Institute of Chinese Medicine (HKJCICM) conducted a survey on future developments of the Chinese medicine (CM) industry in late May 2009. The survey comprised 7 questions covering 4 aspects, namely macro-environment; R&D innovation and application; education; and health services. Multiple answers for each question were allowed.

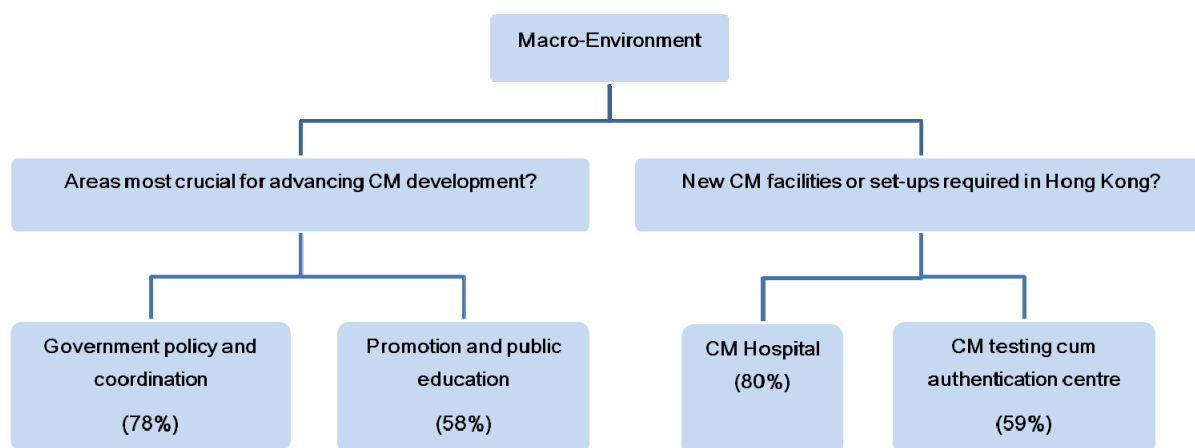
## Findings

A total of 436 completed questionnaires were collected on-line and by mail/fax. Respondents were from various sectors including CM industry (52%), education (14%), professional services (12%), R&D (8%), business & investment (3%), government & regulatory (3%) and others (8%). The majority of them are university graduates (78%) and aged between 26 and 65 (79%). The data collected was analyzed by frequency of selection and the top two items are presented here.

### **1. Macro-Environment (Fig.1)**

- Respondents considered that government policy and coordination (78%) and promotion and public education (58%) as important for advancing CM development;
- For new CM facilities required in Hong Kong, respondents suggested the need for CM hospital (80%) and CM testing cum authentication centre (59%).

Fig. 1



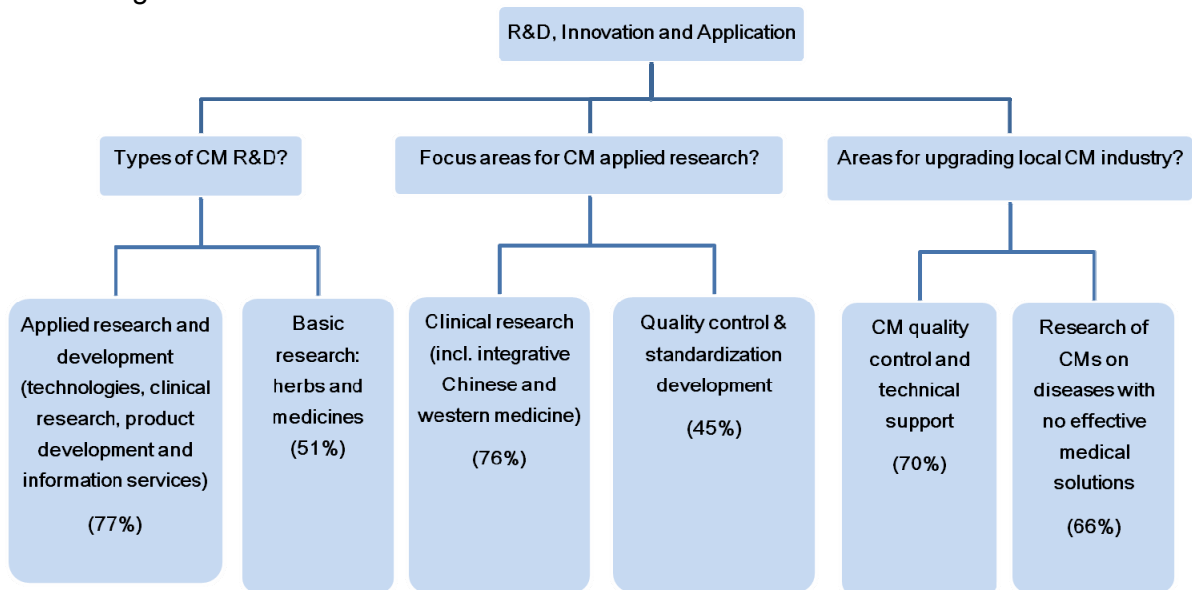
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### **2. R&D, Innovation and Application (Fig. 2)**

- 77% respondents considered applied research and development (technologies, clinical research, product development and information services) as the primary research focus while 51% respondents were also in support of basic research of herbs and medicines;
- For applied R&D, clinical research including integrative Chinese and western medicine was considered important (76%), followed by quality control & standardization development (45%);

- 70% respondents suggested that CM quality control and technical support was required for upgrading local CM industry; and 66% supported CM research on diseases with no effective medical solutions.

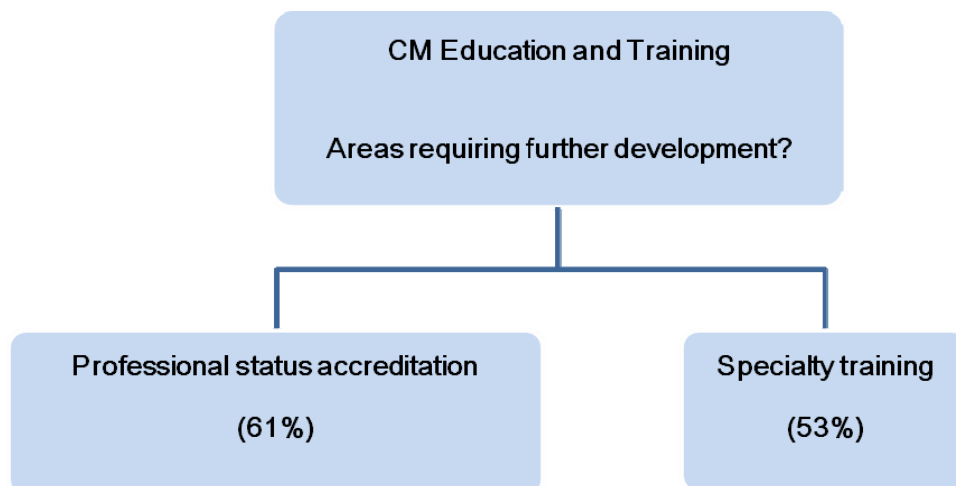
Fig. 2



### 3. CM Education and Training (Fig. 3)

- 61% respondents supported accreditation of professional status and 53% supported specialty training. Respondents from CM industry, including CM practitioners, were supportive of specialty training while other groups gave more weight to accreditation of professional status;
- Respondents aged 16-45 supported accreditation of professional status while those aged 46 or above supported specialty training.

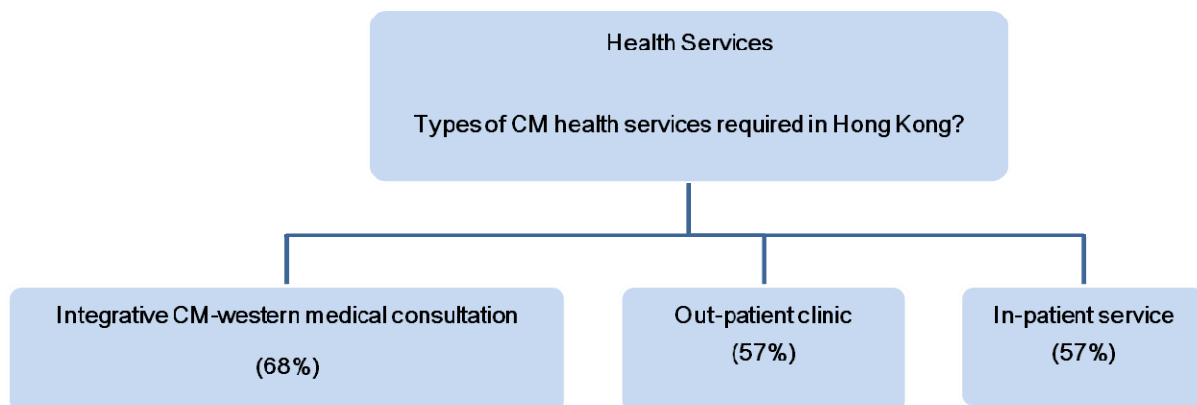
Fig. 3



#### 4. Health Services (Fig. 4)

- Respondents selected the following services to be strengthened: integrative CM-western medical consultation (68%); out-patient clinic (57%); and in-patient service (57%);
- CM sector favoured in-patient service while the majority of other sectors supported integrative CM-western medical consultation;
- Analysis by age revealed that 16-25 group was in favor of specialty consultation, while the 26-65 group supported integrative CM-western medical consultation and 66+ group desired both integrative CM-western medical consultation and out-patient clinic.

Fig. 4



#### Other Comments

Additional comments and suggestions collected were summarized below:

1. To set up designated government agency to coordinate and advance CM industry development
2. To promote mainland-HK cooperation among government, industry, academia and research communities
3. To encourage companies to explore international markets (provide assistance in getting acceptance by international markets)
4. To have a seat in LegCo representing the CM industry
5. To increase funding for industry support
6. To eliminate poor-quality products and to ban misleading marketing practice
7. To incorporate CM into public health system
8. To set up CM university
9. To foster CM multi-disciplinary research
10. To intensify research on CM standardization
11. To foster joint research of CM practices and pharmacy
12. To set up a database of CM formulae and their efficacy.