General Osteopathic Council

Council
20 July 2023
Public and patients perceptions survey findings

Classification	Public
Purpose	For decision
Issue	The findings from the public and patients perceptions survey conducted by YouGov and the implications for our wider work.
Recommendations	1. To agree to publish the report as outlined in the paper. 2. To agree the approach to next steps.
Financial and resourcing implications	£21,600 inclusive of VAT. Additional resourcing implications will be limited and dependent on the actions to be implemented as a result of the findings.
Equality and diversity implications	Researchers have taken into consideration the work of GOsC to understand the experiences of osteopaths with specific protected characteristics, and have included respondents with a diverse range of these characteristics in the sample. An excerpt of the typical breakdown is provided in the Annex. There is a difference in views between people of different ages and ethnic backgrounds and our next steps will be to explore further to better understand the implications and how it informs our communications about what we do and how we do it.
Communications implications	The findings will be used to influence the future direction of our communications and engagement work across the organisation.
Annex	A. Perceptions: Public and Patients Report by YouGov on behalf of the General Osteopathic. B. Key findings from 2022/23 Public Perceptions Survey by YouGov and separate summary of statistically significant findings.
Authors	Jessica Davies, Liz Niman, Fiona Browne

Key messages

- This paper explores the implications of the findings from the third wave of GOsC's public and patients perceptions tracking survey, which was first conducted in 2014 and then again in 2018 prior to this survey in 2022/23.

- The findings continue to show useful information for osteopaths about what is important to patients prior to and during appointments. Information about the benefits of treatment, risks, costs and what treatment will involve are important for patients and in particular, older patients. Information about our concerns process is particularly important for people with disabilities.

- There has been a slight decrease since 2014 in the levels of public confidence in osteopathy. This research does not provide an indication as to why confidence may be on the decline, however, we can take into consideration possible impacts of recent high profile media cases and also whether other health professional regulators have experienced similar outcomes.

- The findings were considered by the Policy and Education Committee in June 2023. The Committee noted both the value in the findings and limitations in relation to method and noted the reflections of the executive team about how those findings might inform ongoing and future strategy and policy. Committee recommended Council publish the report.

- Going forward, we see these findings as being useful in our work to support newly qualified osteopaths and in our ongoing shared decision making/patient values project. We might also consider carrying out further qualitative research to explore the findings in relation to the drop in confidence among young people, and the reasons for the decline in respondents from ethnic minorities viewing regulation as important.

- As the patient perceptions survey was established prior to the communications and engagement strategy, we are also interested to explore further what gaps exist in our knowledge to date and how best we might meet them. Council is also asked to consider our approach to next steps and provide feedback.

Background

1. In 2014 GOsC commissioned YouGov to carry out its first public and patients perceptions survey: The Public Perceptions Study, to explore and ascertain:

   a. perceptions and expectations of the profession and levels of knowledge of and trust in osteopathy
   b. information needs and what information might be sought by those becoming a patient of an osteopath
   c. expectations of the experience of being a patient of an osteopath
   d. relative perceptions of professionalism and quality of care as compared to other healthcare providers

2. In 2018 the second Public Perceptions Study was conducted again by YouGov using the same questions, to track changes in perceptions over the four-year period, with the addition of a question to reflect the CARE measure as part of our patient values project. A nationally representative survey of 1,004 members of the UK public and 500 osteopathic patients[1] was conducted online by YouGov and the findings were compared against those from the November 2014 survey. The findings from the 2018 survey are discussed in part in this paper and are available to download in full from our website.

3. In December 2022 we commissioned this third public and patients perceptions tracker survey. This is attached at Annex A. Again, the questions for this latest public and patients perceptions survey largely mirror the questions asked during the 2018 and 2014 research in order to be able to draw comparable findings, and to accurately track changes over time.

4. However, given changes in societal and contextual issues during the past 5 years including the COVID-19 pandemic and the ongoing rise in NHS treatment waiting times, we included three additional and separate questions to the survey to find out:

    a. The expectations of patients towards infection control measures put in place by osteopaths.

    b. Whether delays in GP advice/treatment have caused patients to seek osteopathic care.

    c. The motivators for members of the public to seek osteopathic treatment and whether these have been impacted by the cost of living or NHS waiting times.

5. A summary of the key findings and our reflections from the survey as presented to the Policy and Education Committee is outlined at Annex B. Also outlined at Annex B is a further analysis of only the statistically significant findings which have changed meaningfully since the last tracker survey was undertaken in 2018. As noted in the report: 'these figures are considered statistically significant and identify a true difference in opinion'.

[1] In this context a patient is defined as a person in the UK who has visited an osteopath in the past 12 months. The same definition applies to the findings and approach of this latest survey. While it is important to consider that the public sample may include some individuals with prior experience of osteopathy less recent than the previous 12 months, this does not affect the value of the patient sample which we designed to ensure that we could ask more specific questions about the patient experience, that members of our general public sample would be unlikely to answer with any richness.

6. Feedback from the Policy and Education Committee included:

   - The findings were useful in the context of the tracker survey, however, there were some limitations to the methodology identified, including for example, perhaps a lack of clarity over the definition of public respondents (osteopathic patients were defined as having seen an osteopath over the past 12 months, but public were not defined in this way and therefore could have seen an osteopath 13 months ago). It was challenging to interpret some of the findings and messages that came out of different questions in the survey, some of which appeared to conflict with each other. It was important to publish the report but also to recognise that it was just one of a range of sources of information about osteopathy and osteopathic regulation.

   - There were a diversity of views in the Committee as to what the implications of the survey findings were for osteopathic education etc and this demonstrated that different perspectives influenced the interpretation of the meaning of the findings.

   - The survey findings were focused primarily on confidence. The meaning of confidence may have been different for different respondents, was it safety, efficacy, regulation, training? It would be interesting to explore this further.

   - Confidence is a different concept to trust and to this extent, there were gaps in the survey in understanding the implementation of our communications and engagement strategy from the perspective of patients and the public.

   - Some of the findings likely indicated the lack of knowledge and understanding about osteopathy and osteopathic regulation rather than lack of confidence or trust.

   - How would the findings inform actions taken by the regulator or the sector as a whole?

Discussion

Publication of the report

7. We intend to publish this report on our public perceptions web page with an updated short commentary on important findings for osteopaths and significant changes, recognising the value and limitations of the report. We will also be clear about our proposals for next steps for further work aligned more closely to our communications and engagement strategy.

Key reflections on the findings

8. The findings continue to show useful information to osteopaths about what is important to patients prior to and during appointments and we can continue to promote this for osteopaths. For example (see paragraphs 10 and 12 of Annex B)

benefits of treatment, risks, costs and what treatment will involve are important for patients and in particular, older patients. Information about our concerns process is particularly important for people with disabilities.

9. From these findings we can see that both communication and consent are becoming increasingly important for osteopathic patients. This supports our ongoing efforts to engage with osteopaths on the topic of boundaries, professional judgement and shared decision making in connection with our CPD scheme. The findings highlighted earlier also demonstrate the importance of setting expectations with patients prior to an appointment, which our shared decision making resources support osteopaths to do in their practice. We know already that these findings might help us provide support to newly registered osteopaths.

10. It is of note that there are differences in views related to age and ethnicity. In terms of age, we intend to explore the drop in confidence among young people towards whether a concern raised about an osteopath would be properly investigated. This research does not indicate possible reasons for this and so we might benefit from further qualitative research, such as focus groups, with 18-24 year old members of the public. We may also want to consider engaging with other health professional regulators to explore whether this drop in confidence is consistent across other perceptions surveys. In terms of ethnicity, we would like to explore further the reasons for the decline in respondents from ethnic minorities viewing regulation as important and whether this has had a direct impact on their levels of confidence in regulation.

11. There has been a slight decrease since 2014 in the levels of public confidence in osteopathy. This research does not provide an indication as to why confidence may be on the decline, however, we can take into consideration possible impacts of recent high profile media cases, such as the Jemma Mitchell case (which was publicised three months before this survey was conducted) and also whether other health professional regulators have experienced similar outcomes. This is perhaps something for us to consider exploring further with other health professional regulators.

12. Despite the slight decline reported in the importance of monitoring by a regulatory body in giving the public confidence in healthcare professionals, it is important to note that the factors that have been chosen as 'more important' are in fact elements controlled, monitored or reviewed as part of the regulatory remit (providing good quality advice and treatment, having a recognised level of education, appropriate standards and being required to keep knowledge and skills up-to-date). Compared to previous years, the public are more motivated to visit an osteopath as a result of knowing osteopaths are regulated (eg held to certain professional standards) – see para 27a in annex B (statistically significant differences in the findings of 2022/23).

13. It is reassuring that the majority of osteopathic patients see regulation as important in giving confidence. It will be interesting to explore further the extent to which patients learn more about regulation after they see an osteopath.

14. Osteopathic patients are also significantly more likely than the general public to have confidence in the regulator's concerns process. We will explore how to improve this further through our Patient Involvement Forum. We have previously engaged with this forum on topics relevant to our concerns process, such as our Practice Note on Questioning Witnesses. We might therefore consider expanding on this work to further develop our understanding of what might give patients confidence in our concerns process.

Implications of the findings for our work

15. This report identifies the factors that support patients' confidence in, and positive experiences of, osteopathy. The findings also highlight the factors that may influence a patient's decision to continue seeing an osteopath. This insight may prove useful to newly qualified osteopaths, as the research conducted recently with this audience found that some of their concerns centre on a perceived gap in their knowledge or skills relating to patient retention and communication. This insight that can therefore shape our messaging for newly qualified osteopaths, helping us to prioritise the support we provide to them going forward. This will also help us to support all osteopaths to understand what is important to patients in terms of confidence in osteopaths and osteopathic regulation as a whole.

16. These survey findings also support the work we have been doing as part of our patient values/shared decision making project. Patients evidently value being listened to by their osteopath, which gives them confidence in that osteopath's ability. Similarly, these findings show the importance of osteopaths helping patients to make an informed choice based on all relevant information (such as benefits, risks, and costs of treatment) which also aligns with our advice and resources for the profession on shared decision making. This insight can therefore be included as part of future engagement events, such as presentations or webinars, and can help us further shape messaging for example on our website and social media, promoting our shared decision making resources.

Further work to measure public and patient perceptions to support implementation of our communications and engagement strategy: Confidence and trust

17. Our communications and engagement strategy has a key aim of promoting trust. Confidence can be defined as 'the feeling or belief that one can have faith in or rely on someone or something'. Trust, however, is a 'firm belief in the reliability, truth, or ability of someone or something'. Therefore in our aim to promote trust we are striving for something deeper than confidence.

18. The aims of the Public Perceptions Study (2023) are based in concepts of confidence, and it can be inferred from the findings that levels of confidence are

increased through familiarity with osteopaths and osteopathy given the difference in responses between the public and patients who have seen an osteopath in the past 12 months. However, as outlined above, we do not know what factors informed the respondents' understanding of 'confidence' for example was it related to efficacy, safety or other factors not mentioned in the survey? Taken together with the focus of the statistically significant findings which relate to more importance being attached to the functions of regulation or more considered decisions about choosing osteopathic care, and the implications of the report that better understanding of regulation may correlate with increased confidence, it seems that a focus on promoting better understanding of regulation will support us to better measure perceptions of how GOsC performs its role, to support the implementation of the communications and engagement strategy.

19. In the development of our thinking about our other forthcoming survey around registrant and stakeholder perceptions, and to begin to measure the impact of our communications and engagement strategy with registrants, we are exploring with Committee and Council:

- a baseline of stakeholders' understanding of our role as regulator
- perceptions of how we perform that role and, subsequently, levels of trust in GOsC
- how this data will help us to understand the connections between these aspects which we can begin to track over time

20. Building on our learning from the patient perceptions work, we are proposing – applying a greater focus on levels of understanding of our functions, which is a gap in the current YouGov work. We want to clarify perceptions of how we perform that role and then to explore in more detail the concept of trust. We propose to explore this with patients (and potentially the public) in a more qualitative way, to better understand how best we might increase understanding about our role and the functions we perform in the first instance.

21. In particular, it will be useful to explore the journey of patients' understanding of regulation. Did the importance of regulation increase once they had seen an osteopath? And if so, how and why? And how might this insight enable us to be clearer about what we do as a regulator to increase understanding of our functions.

22. In conclusion, the patient perceptions report has value for osteopaths and for us as a regulator in terms of understanding what is important to patients and we will share these findings through publication and key messaging. However, it also reveals a range of further research questions in relation to our Communications and Engagement Strategy which we will take forward with more qualitative work.

Recommendations

1. To agree to publish the report as outlined in the paper.

2. To agree the approach to next steps.

Key findings from 2022/23 Public Perceptions Survey by YouGov and separate summary of statistically significant findings

1. A total of 1014 members of the public and 502 patients were surveyed as part of this 2023 research. The report, available in Annex C, separates the findings of the survey into 5 categories. Below we note the key findings for each of these categories.

2. The report's analysis includes reference to statistically significant differences – those that YouGov believe to sit outside the margin of error and which identify a true finding. However, it is for GOsC with the help of Council and Committee members, to consider whether these differences are significant enough to warrant a change in policy or strategy.

Confidence in healthcare professionals

3. Around half (46%) of the general public have confidence in getting advice/ treatment from osteopaths, and they rank around the middle across all healthcare professionals polled. There does seem to have been a slight decrease overall in public confidence in osteopathy since 2014 and 2018 findings - 50% in 2018 and 52% in 2014. However this change comes from the group with a 'fair amount of confidence' – the number of those with 'a lot of confidence' in osteopathy has stayed the same since the previous waves of research. It is also worth noting here that it may be difficult to identify why members of the public have confidence or not without having seen an osteopath.

4. Conversely, over nine in ten (96%) osteopathic patients surveyed have a lot or fair amount of confidence in osteopaths. This is encouraging, as it appears a patient is more likely to have confidence in osteopathy than a member of the public. However, it is also possible that some among the public sample may have seen an osteopath before but just not in the past 12 months and based their lack of confidence on a previous negative experience of osteopathy.

5. Confidence in osteopaths is higher than counsellors (42%), acupuncturists (28%), and herbalists (17%), and lower than confidence in nurses (86%), pharmacists (84%), dentists (82%), GPs (79%), and physiotherapists (70%), all of whom are primarily part of or closely related to the NHS. Osteopaths rank the same as chiropractors. This is consistent with the 2018 and 2014 findings.

6. The 2023 findings show that confidence among the general public in receiving advice and or/treatment from a healthcare professional is determined by the provision of good quality advice and treatment (92%), requirements for keeping their knowledge and skills up to date (91%) and having a recognised level of

education and training (91%). This is broadly consistent with the 2014[2] and 2018 findings. Although again causes us to question on what basis do members of the public feel overarching confidence in osteopaths. Interestingly, this also shows that knowledge and skills are perhaps unsurprisingly important to the public, which supports the continued focus on this aspect of CPD for many osteopaths.

7. From the 2023 findings we can also see that osteopathic patients are more likely to say all of these things are important to them than the general public. 98% of patients say having a recognised level of education and training is important, compared to 91% of the public. People with a disability are also more likely than those without to say having indemnity insurance is the **most** important factor (17% vs 13%).

8. Though a large majority still identifies being monitored by a regulatory body as important, people from ethnic minority backgrounds, appear to have reducing confidence. In 2014, 89% of ethnic minority respondents said monitoring by a regulatory body was important, compared to 80% in 2018 and 70% in 2023. Patients are more likely than the general public to identify being monitored by a regulatory body (96% vs 88%) as important. This demonstrates the importance of exploring factors informing confidence and indeed trust with a diverse patient and public population and we discuss this further below.

Deciding to visit an osteopath: information needs

9. For osteopathic patients, personal experience is the main driver of choosing osteopathy over other medical/ healthcare professionals (84%). Around half say that 'knowing I can access treatment quickly' (50%), regulation (48%), or recommendation from a family member/ friend (47%) would encourage them to go to an osteopath.

10. For members of the public, ahead of their first appointment, the most valuable information to have is information regarding the benefits of treatment (91%), costs (89%) and what the treatment will involve (88%). Information about the risk of treatment was also seen to be valuable (87%). This is roughly consistent with the 2018 findings.[3]

11. Osteopathic patients are finding it more important to get information about being monitored by a regulator prior to getting treatment. In fact, most pieces of information are seen as more important than they were in 2014. In particular, only seven in ten said information about being monitored by a regulator was important to them in 2014 (70%), rising to nine out of ten in 2023 (90%). On

[2] Important to note that the requirement to keep their knowledge and skills up to date was not included as an option in the 2014 perceptions survey.
[3] The 2018 findings showed the most valued pieces of information for members of the public to have prior to their first osteopathy appointment to be information regarding the benefits of treatment (92%), what the treatment will involve (90%) and the risks of treatment (90%).

the other hand, the public is finding being monitored by a regulator slightly less important for instilling confidence in healthcare professionals, with 88% saying this is important in 2023, compared to 91% in 2018 and 92% in 2014.

12. Across the general public, older respondents tend to be more likely than younger respondents to think each piece of information is important - there is a particularly large rising trend by age for wanting to know the benefits of treatment ahead of an initial visit (75% 18 to 24, 97% 65+). Those with a disability are more likely than those without to want to know ahead of time if there is a complaints process in the event they are unhappy with treatment (71% vs 62%).

Experience of visiting an osteopath

13. Over nine in ten osteopathic patients surveyed think their osteopath was very or fairly good during their most recent visit, in relation to specific factors. In particular, almost all say the osteopath was very good at making them feel at ease (91%) and nearly nine in ten said their osteopath was very good at being positive (87%) or showing care and compassion (87%).

14. More than three-fifths of patients surveyed say that, in the past two years, they have seen an osteopath because it was faster than seeking advice/ treatment from a GP (63%). Women are much more likely to report this than men (70% vs 53%), but there are minimal other demographic differences.

15. When asked what is most important in giving them a positive experience of osteopathy, the majority of patients want to feel confident in their osteopath's knowledge and skills (62%). This is consistent with previous findings (61% in 2018) and, in fact, none of the factors have shifted significantly over time.

16. Information about the osteopath being registered/regulated is particularly welcomed by patients from lower social grades (28% C2DE vs 17% ABC1) and those with a disability (24%, 16% no disability).

17. Clear communication from osteopaths is key and has become particularly important. There has been a significant increase in the proportion who say the osteopath listening to what they have to say is very important in building their confidence in that osteopath (85% vs 72% 2018). This has seen a sharp increase compared to 2018, as has the importance of the osteopath asking permission before examination or treatment (48% vs 41% 2018).

Professional standards and the GOsC

18. Looking at perceptions of regulation among various healthcare professions, again osteopaths rank around the middle of all healthcare professionals with four in ten (41%) people saying they think osteopaths are regulated. Osteopathic patients are about twice as likely than the general public to know osteopaths are regulated (78% vs 41%). The healthcare professionals who come out on top

largely mirror who the public say they have the most confidence in, with the most regulated healthcare professions seen as GPs (86%), dentists (82%), nurses (81%), and pharmacists (78%), closely followed by physiotherapists (64%), and psychologists (60%). These remain consistent across all three waves.

19. When examining the general public's awareness of the requirements osteopaths must meet, people are generally becoming more aware of all rules. Though almost two-thirds (64%) of the public remain unaware of any of these, there has been a steady increase in awareness of almost every listed rule since previous years. Compared to 2014, the public are more aware of most rules. Each wave there has been an increased awareness of osteopaths' requirement to hold indemnity insurance (15% 2014, 18% 2018, 22% 2023), and of the public Register to check an osteopath's qualifications (8% 2014, 11% 2018, 15% 2023).

20. As this was the first wave where data was collected after the COVID-19 pandemic, a new question was included to examine what osteopathic patients believe osteopaths should do to keep their patients safe. While a large majority think all options provided should be taken, keeping the treatment room clean, safe and hygienic is the most important to the public, with nine in 10 (91%) selecting this option. This is followed by complying with health and safety regulations (81%) and implementing standard infection control measures (79%).

Providing feedback and reporting concerns

21. If they were to raise a concern, half of UK adults surveyed are confident that it would be properly investigated and addressed (49%) and this rises to almost three-quarters of osteopathy patients (73%). The lower confidence amongst all UK adults is primarily due to higher levels of uncertainty – only 7% are not confident concerns about an osteopath would be addressed.

22. Confidence among adults does appear to have fallen over time – in 2014, 58% thought a concern would be properly investigated, 53% in 2018 and now 49%. The fall has been driven by younger adults – in 2018, over half of 18-24 year olds were confident a concern would be addressed (54%) and this has fallen to two-fifths (38%).

23. Confidence among patients has not changed over time – 73% of osteopathic patients are confident that a concern raised against an osteopath would be properly investigated.

Statistically significant findings only

24. Reflecting on the findings and the feedback from Policy and Education Committee in June, we have now also looked at what has changed significantly over the tracking survey to see what this tells us about our regulatory role.

25. In most cases, the findings were not statistically significantly different from previous years but they still have value in terms of being useful to osteopaths to understand what's important to patients.

26. The findings that were statistically significant changes primarily related to factors important to public and osteopathic patients in visiting or having confidence in osteopaths.

27. However, if we focus on statistically significant changes to specific questions, identified by green or red triangles in the report at Annex A we can see that the following were changed:

   a. Increased motivations to visit an osteopath[4] included:
      i. knowing osteopaths are regulated (eg held to certain professional standards);
      ii. recommendation from a family member/friend; knowing that they can access treatment quickly.

   b. Decreased motivations to see an osteopath[5] included:
      i. recommendation from third party, eg other health professional or charity,
      ii. knowing the cost of treatment is affordable.

   c. Factors in deciding whether to visit an osteopath (patients only):[6]
      i. Factors of increased importance included:
         1. whether they were monitored by a regulatory body;
         2. proof of their registration;
         3. whether they are a member of professional networks
         4. risks of treatment
         5. costs of treatment
         6. professional indemnity insurance
         7. length of training
         8. practice complaints procedure
      ii. There were no factors which were of statistically significant decreased importance.

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[4] (Q: Please imagine you have an issue you think an osteopath could treat. Which, if any, of the following would motivate you to seek advice / treatment from an osteopath over another type of medical / healthcare professional and respondents = 1014 members of the public)

[5] (Q: Please imagine you have an issue you think an osteopath could treat. Which, if any, of the following would motivate you to seek advice / treatment from an osteopath over another type of medical / healthcare professional and respondents = 1014 members of the public)

[6] (Q: Please think back to when you were deciding whether or not to see an osteopath for treatment. How important or unimportant would information on the following factors have been in helping you make your decision? = 502 osteopathic patients
*not included in 2014. †2014 wording was "Whether they are overseen by a regulator". ‡2014 wording was "They have an insurance policy in case something goes wrong =)

d. Importance of factors giving confidence to osteopathy patients:[7]
   i. Factors that showed a statistically significant increase in importance included:
      1. listens to what I have to say
      2. treats me with dignity
      3. puts me at ease
      4. knowing what I tell them will remain confidential
      5. asks my permission before examining or treating me
   ii. None of the factors showed a statistically significant decrease in importance.

e. Awareness of the rules that osteopaths needed to follow (public)[8]
   i. Statistically increased awareness included (note range from 9% to 22% awareness):
      1. In order to practise, osteopaths must hold professional indemnity insurance
      2. Only qualified osteopaths registered with the GOsC are allowed to work as osteopaths in the UK
      3. There is a publicly available Register that allows the public to check whether an osteopath is qualified to treat them
      4. Osteopaths are required to renew their registration every year
      5. Osteopaths are required to complete at least 90 hours of continuing professional development every 3 years
   ii. There were no examples of statistically significant decreased awareness of any of the rules that osteopaths needed to follow.

f. Sources used to look for information on standards of osteopaths / osteopathic practice[9]
   i. Sources that showed a statistically significant increase in terms of use included:
      1. GOsC (website, telephone, publications, social media)
      2. Osteopathic practice
      3. Osteopathic College
      4. Other
   ii. Sources that showed a statistically significant decrease in terms of use included:
      1. NHS website
      2. GP practice
      3. Hospital

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[7](Q: How important or unimportant are each of the following factors in affecting the confidence you have in an osteopath? = 502 osteopathic patients)

[8] Q Before starting this survey, which of the following rules that osteopaths need to follow, if any, were you aware of? = 1014 members of the public
*note: wording in 2014/2018 was "Osteopathic practice requires training to university degree level with a minimum of four years study

[9] Q Which of the following sources, if any, would you use if looking for information about standards of osteopathic practice which osteopaths need to follow? = 1014 members of the public

28. Taking only the statistically significant changes, it could be argued that the functions of regulation are being seen as increasingly important to decision making for public and patients and that the role of the regulator in terms of exercising its functions properly is increasingly important.

29. On the other hand, it could also be argued that, because statistically significant changes primarily relate to increases in importance (rather than decreases), we cannot necessarily assume that these factors were more important in their own right; it is possible that more or other different factors were being considered by the public and patients in seeking care. This could mean that public and patients are making more considered decisions about healthcare overall.