Policy and Education Committee
June 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.
Recommendation	1. To consider the findings and provide feedback or comments on the report. 2. To consider the implications of these findings on the wider work of GOsC and whether there are implications not already stated in this paper. 3. To agree to recommend to Council that this findings report be published.
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.
Communications implications	The findings will be used to influence the future direction of our communications and engagement work across the organisation.
Annex	A. The full survey findings report. B. Typical breakdown of protected characteristics within sample.
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Key messages

- This paper explores 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.

- Around half (46%) of the general public have confidence in getting advice/ treatment from osteopaths, and osteopaths rank around the middle across all healthcare professionals polled.

- The majority of patients surveyed have a lot or a fair amount of confidence in osteopaths (89%) and believe that being monitored by a regulatory body is an important factor in giving confidence (96%).

- We are beginning to think about how these findings, which largely focus on confidence, might support or relate to the concept of trust, a key aim of our Communications and Engagement strategy 2021-2024 and a topic which we will be exploring later this year as part of our Registrant and Stakeholders Perceptions Survey.

- We would welcome Committee's early thoughts on how these two pieces of work [public/registrants] might be more closely linked, and what areas or questions may be missing from this.

- As well as Committee's thoughts on the above, we are seeking agreement from Committee to recommend to Council that we publish these findings. We also welcome comments regarding the implications that these findings might have for GOsC's wider work.

Background

1. In 2014 GOsC commissioned its first public and patients perceptions survey 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 this survey 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 with the Collaborative Centre for Values Based Practice. A nationally representative

survey of 1,004 members of the UK public and 500 osteopathic patients[1] was conducted online by YouGov and compared against the findings of the survey conducted by the GOsC in November 2014. The findings of the 2018 survey are discussed in part in this paper and are available to download in full from our website. The planned approach included conducting the survey again in another 4 to 5 years to continue tracking changes over time.

3. In 2021 GOsC published its Communication and Engagement Strategy 2021 to 2024. The aims of the strategy are to promote trust through improved relationships and engagement with our stakeholders; be timely and responsive to stakeholder needs based on insight; and to be a forward looking regulator by ensuring our communication channels are relevant.

4. Led by the strategy, we are constantly seeking feedback and actively engaging with, and listening to, our key audiences, to increase our understanding so that our overall approach is reflective, outward-looking and led by the needs of our audiences.

5. In December 2022 we commissioned the next wave of our public and patients perceptions survey, to continue tracking perceptions and to build on our understanding of the views of patients and the public, whose safety we are responsible for promoting through the setting, maintaining and developing of standards of osteopathic practice.

6. 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. This is especially true of questions that reflect the CARE measure as the findings will hopefully support the GOsC's patient values/shared decision making project.

7. However, given changes in societal and contextual issues during the past 5 years, which may impact on perceptions of patients towards osteopathic care and regulation, especially following 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.

[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.

Key findings

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

9. 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 Committee members, to consider whether these differences are significant enough to warrant a change in policy or strategy.

Confidence in healthcare professionals

10. 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.

11. Conversely, over nine in ten (96%) osteopathic patients surveyed have a lot or fair amount of confidence in osteopaths.

12. 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%). Osteopaths rank the same as chiropractors. This is consistent with the 2018 and 2014 findings.

13. 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.

14. 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

[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.

those without to say having indemnity insurance is the **most** important factor (17% vs 13%).

15. Though a large majority still identifies being monitored by a regulatory body as important, compared to previous waves, the public is finding this slightly less important for instilling confidence in healthcare professionals over time, with 88% saying this is important in 2023, compared to 91% in 2018 and 92% in 2014. This is particularly driven by people from ethnic minority backgrounds – 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.

Deciding to visit an osteopath: information needs

16. 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.

17. 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].

18. Osteopathic patients are getting more cognisant of the importance of information prior to getting treatment – 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%).

19. 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

[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%).

20. 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%).

21. 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.

22. 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.

23. 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).

24. 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

25. 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.

26. 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).

27. 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

28. 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.

29. Confidence among K 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%).

30. 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.

Key reflections on the findings

31. These findings provide us with some useful insight to progress and focus certain areas of our work, which we explain further below, but we have also been able to identify questions and challenges in response to some of the information in the report.

32. As noted earlier, 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.

33. Despite the slight decline in the importance of monitoring by a regulatory body in giving confidence to the public 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 and being required to keep knowledge and skills up-to-date).

34. It is reassuring that the majority of osteopathic patients see regulation as important in giving confidence. Regulation also plays a key part in motivating patients to see an osteopath over other medical/healthcare professionals. Osteopathic patients are also significantly more likely than the general public to have confidence in the regulator's concerns process, although we can consider how to improve this even further with, for example, engagement 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.

35. 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.

36. One area we want to consider exploring further is that of 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.

37. Another area to consider exploring may be 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.

Implications of the findings for our work

38. The insight gathered as a result of this survey will support our work across a number of existing projects/workstreams, which we have noted below. We welcome PEC's thoughts on these. There are also, as mentioned already, areas where we might want to explore further using qualitative methods, to answer some of the questions posed by the findings of this survey. We welcome

suggestions from PEC on these and suggestions or thoughts as to how else these findings may have implications on our wider work.

39. This report identifies the factors that support patient's 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.

40. 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 on our website and social media promoting our shared decision making resources.

41. As we have identified in this paper, this perceptions survey was started in 2014 and since then our approach to communications and engagement has evolved. Now that we have this third wave of insight into public and patient perceptions, we can begin to think about how this might support or relate to the concept of trust, a key aim of our strategy, which we will be exploring this year as part of our registrant and stakeholders perceptions survey. Once we have completed that survey, we can use the insight gathered to reflect back on this public and patient perceptions survey, to consider how future waves of research might benefit from our understanding of trust, which is starting to grow. Doing so will help us to ensure this research continues to serve our aims for communications and engagement.

42. We welcome the views of Committee in response to these implications, and welcome suggestions as to any wider implications not included in this paper that may be relevant to the findings report.

Recommendations

1. To consider the findings and provide feedback or comments on the report.

2. To consider the implications of these findings on the wider work of GOsC and whether there are implications not already stated in this paper.

3. To agree to recommend to Council that this findings report be published.

Annex B to 4

Typical breakdown of protected characteristics within a sample of 1,000 UK adults.

	Approx. N in 1,000 UK adults
Age	
16-24	130
25-34	166
35-44	156
45-54	164
55-64	154
65+	230
Social grade	
ABC1	570
C2DE	430
Region	
North East	41
North West	110
Yorkshire & Humber	83
East Midlands	72
West Midlands	88
East	93
London	130
South East	137
South West	85
Wales	48
Scotland	85
Northern Ireland	28
Disability	

	Approx. N in 1,000 UK adults
With a disability/ long-term health condition (12 months+)	300
Gender (binary)*	
Male	490
Female	510
Gender identity*	
Gender identity is different to that assigned at birth (e.g. transgender, non-binary)	20
Marital status	
Married/ civil partnership	453
Divorced/ separated	92
Widowed	37
In a relationship	197
Single	221
Pregnancy/ maternity status	
Intending to have a child in the next 12 months	28
Ethnicity	
White	943
Ethnic minority	57
Religion/ belief	
Christian	469
Other religion	50
No religion	456
Sexual orientation	
Heterosexual	868
LGB+	88