

Tracker Survey 2013

Briefing note 4: Public confidence in the market

Key findings:

- Public confidence in the market continues to fall mirroring trends in other economic sectors – people are less confident than last year about their consumer rights being protected or in complaining about lawyers
- People in Wales, C2DEs and BME groups are less confident than other population groups
- The proportion of dissatisfied consumers who do nothing is still 42%
- Trust in lawyers is now at 42% continuing the decline from 47% in the 2011 exercise; trust in other professions is also still falling
- There are significant gaps in trust between ABC1s and C2DEs and between the White British and BME populations

Survey methodology

For the last three years the Panel has commissioned YouGov to conduct an annual tracker survey in two parts: a nationally representative sample (1,762 adults); and a sample of people who have used legal services in the last two years (1,462 adults). Booster samples were obtained for Wales and BME groups. All the figures below have been weighted and are representative of all GB adults (aged 18+). The results have been tested to the 95% confidence level – we are 95% confident that these findings are not due to chance. Fieldwork for this year's survey took place in 20 - 29 February 2013.

Confidence in the market

46% of the general public are confident their rights as consumers would be protected when using lawyers. This saw a 3% fall compared to the previous year's figures and represents a 7% fall since 2011. This decline is mirrored in other professional services sectors, although not in the retail and trades sectors where the figures are lower but have stabilised. The drop in confidence is particularly pronounced for supermarkets; however, the survey took place shortly after the horsemeat scandal.

There is a similar picture in relation to confidence in making a complaint to a lawyer. Only 44% of the general public are confident, down 5% from last year and by 7% since 2011. There has been a similar rate of decline across all sectors surveyed.

Further analysis shows some demographic differences. People in Wales, C2DEs and BME groups are less confident their consumer rights will be protected or in complaining about lawyers. More positively, respondents stating they had a disability were more confident both about their rights being protected and in making a complaint.

Confidence only slightly increases if a legal service was used within the last two years.

Chart 1 – Confidence that consumer rights will be protected, 2011-13

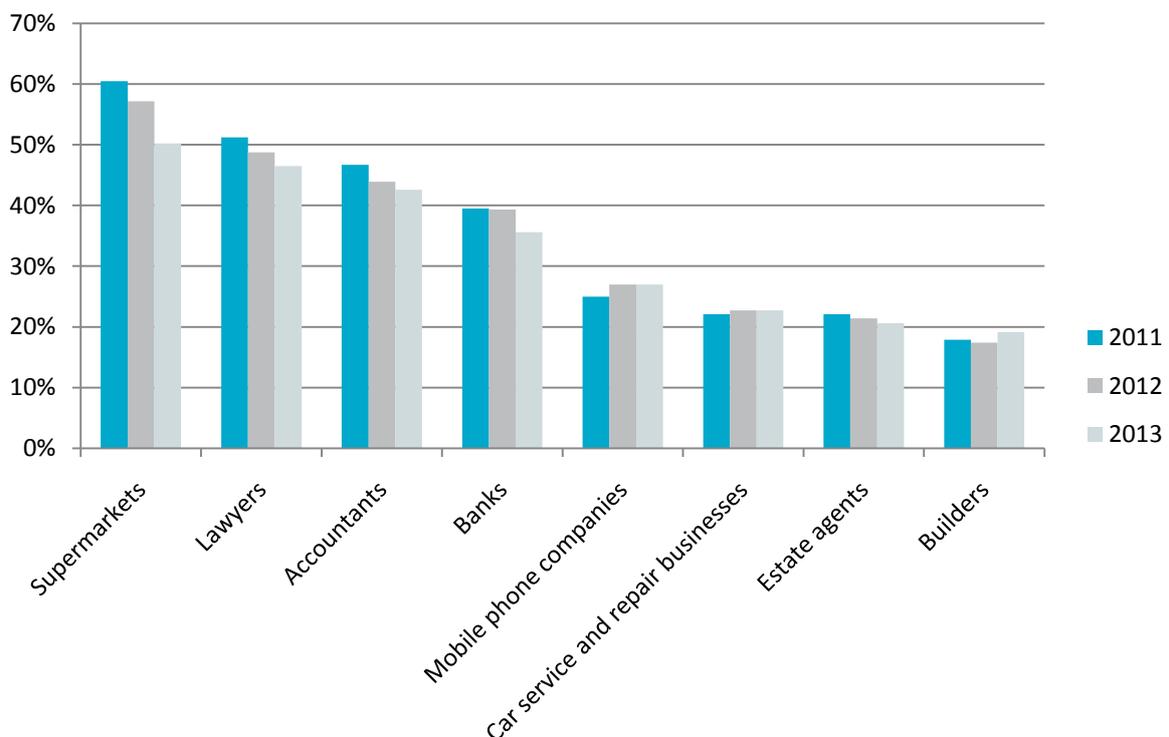


Chart 2 – Confidence in complaining, 2011-13

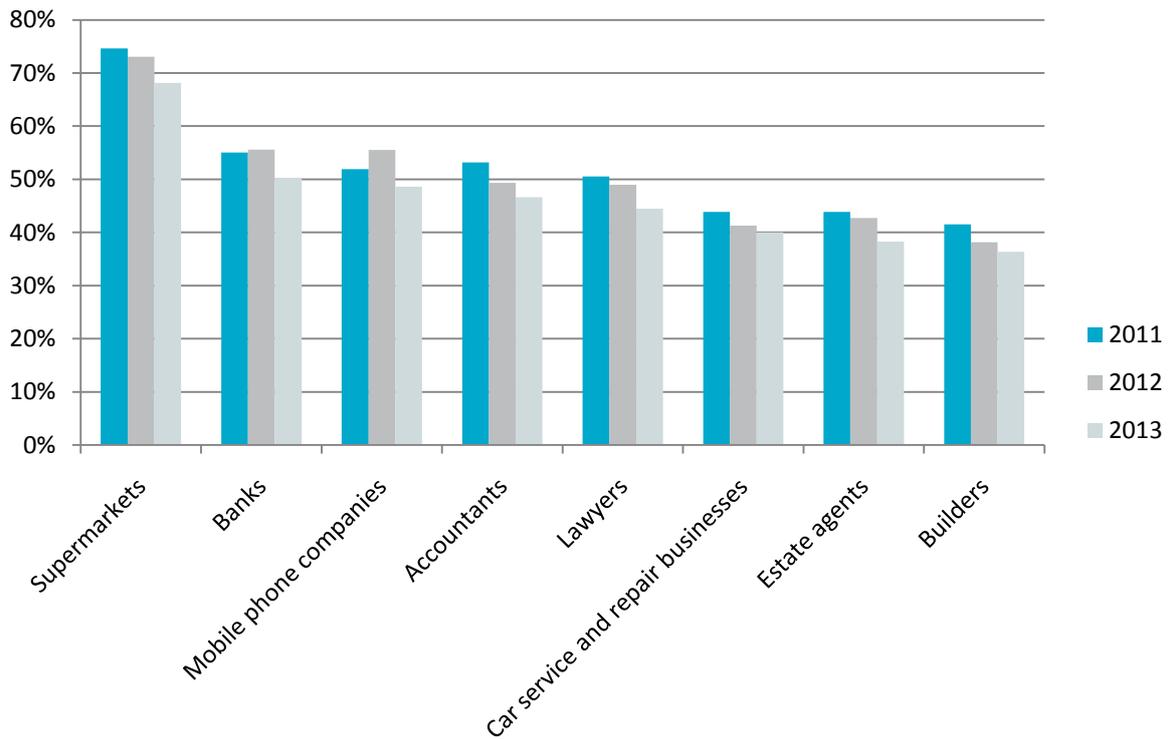
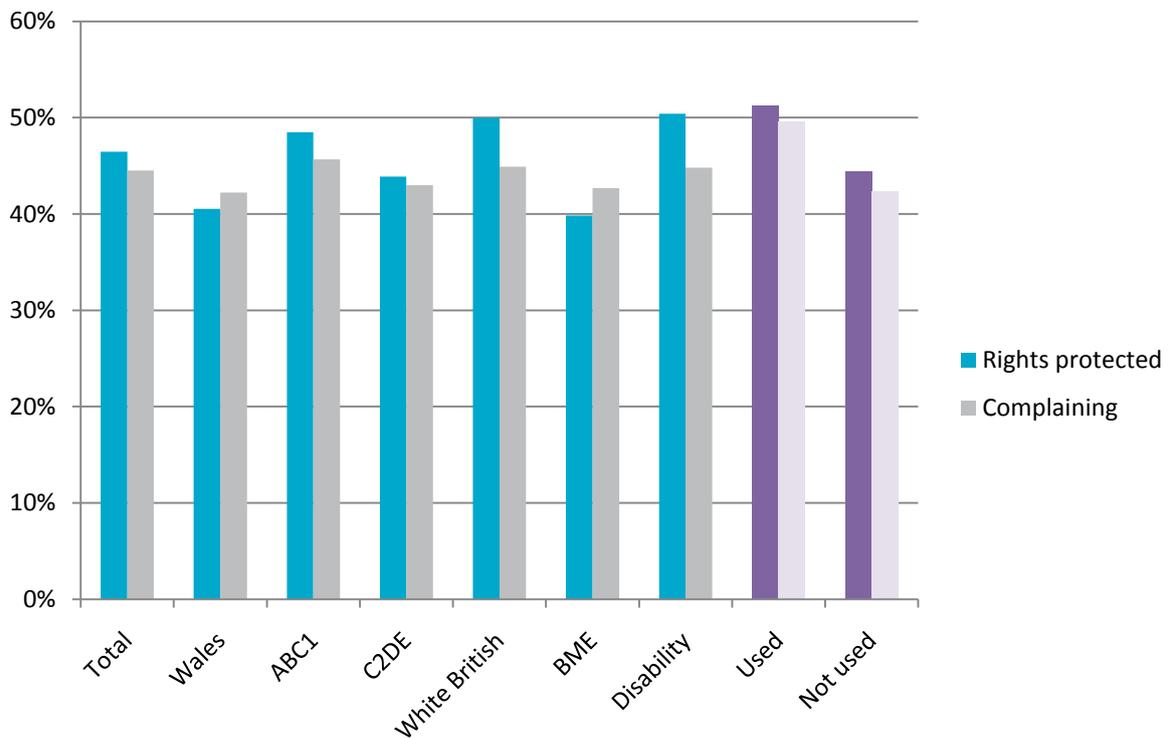


Chart 3 – Demographic differences/usage of legal services and confidence, 2013

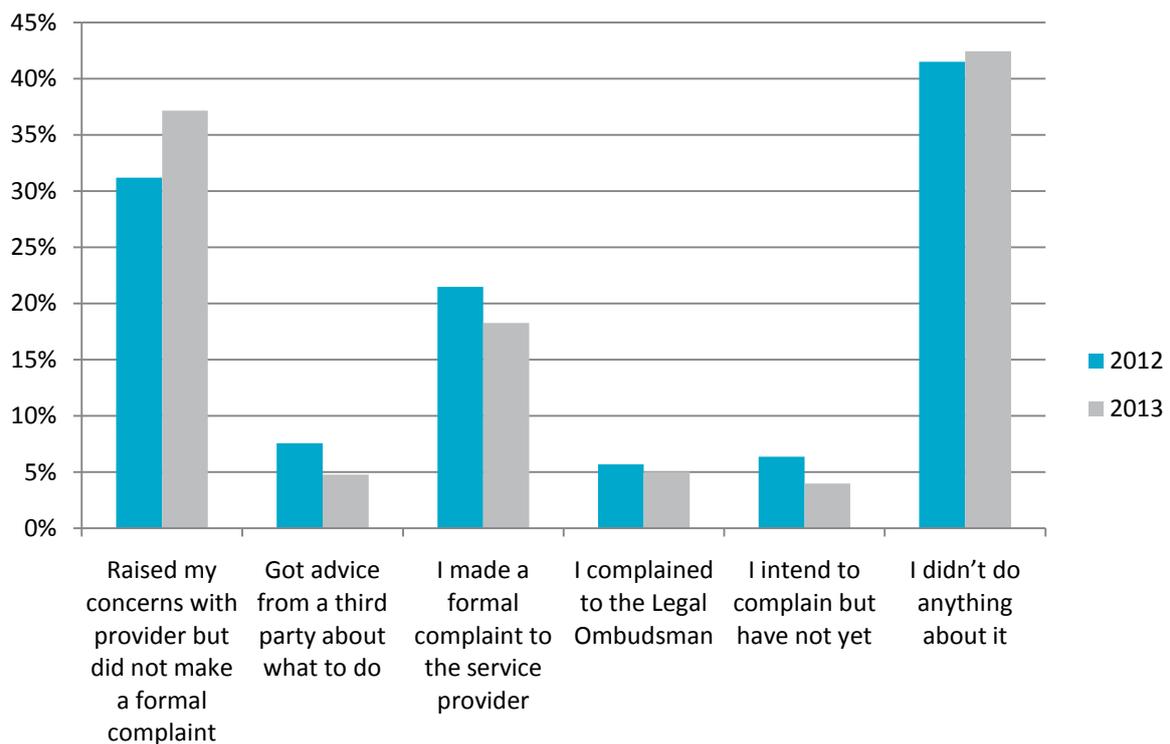


Complaint behaviour

One of the key findings of last year's Tracker Survey was the high proportion of people who do nothing when dissatisfied with the service received from their lawyer. Unfortunately, this is unchanged 12 months on remaining at 42%.

There has been a rise in the proportion of people who raise concerns with their provider without formalising this into a complaint, while there was a drop in formal complaints. Our joint research with the Legal Ombudsman suggests this is an important distinction. This found that the initial process of complaining varies – with many participants making a softer rather than a formal complaint as the first step of the process. There were a number of reasons for 'softer' complaints – typically not wanting to interfere with the case, concern about how to complain and uncertainty about 'challenging' a lawyer in a formal or official complaint process.

Chart 4 – Response to dissatisfaction

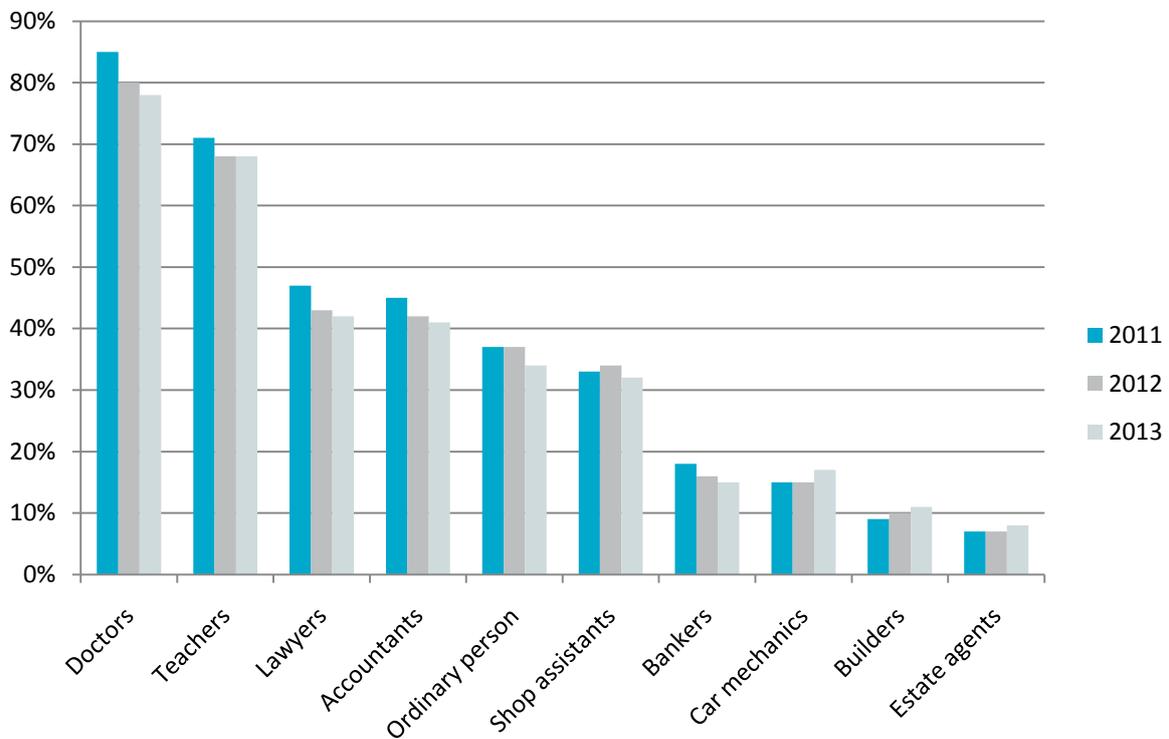


Trust in lawyers

In 2013, 42% of the general public state they would generally trust lawyers to tell the truth. This is similar to 2012 (43%) and continues the fall since the first survey in 2011 (47%). Trust in other professions has declined at a similar rate over the same period.

However, while there are quite low levels of trust among the general population, a large majority of recent users are satisfied with the professionalism of their own lawyer (78%). This has remained constant across the three years of the tracker survey. Although professionalism is not the same as trust, it is closely related. Other research suggests this apparent trust paradox (I trust my own professional, but not the profession as a group) also exists in other sectors.

Chart 5 – Trust in the professions, 2011-13



Population differences

We can segment the results across population groups. This reveals some differences:

- Women and more likely to trust lawyers than men (although trust among women fell from 47% to 43% during the past 12 months; trust among men was static)
- People living in Wales have less trust of lawyers than those in England (39% v 42%). Trust among the Welsh public has fallen significantly from 50% in 2012.
- Trust varies significantly between ABC1s (45%) and C2DEs (38%)
- Trust increases steadily with age (37% of 25-34yr olds to 48% of those aged 55+)
- There is a significant trust gap between the White British and BME populations

As well as a large trust gap between White British and BME populations, there were variations between BME groups. As in 2012, trust is lowest among Black African and Pakistani groups. Trust among all ethnic groups, except the Pakistani group, has fallen during the past twelve months. Although the sample sizes are small, the decline in trust was larger among Indian, Chinese, Black African and Black Caribbean groups.

The greater knowledge about lawyers that people consider they have, the more likely they are to trust the profession. The differences here are quite marked, but they are less significant when comparing recent use of legal services (although this measures usage in last two years rather than never used). Overall the data suggests there is a link between someone's experience and their perceptions of trust.

Chart 6 – Trust among population groups, 2013

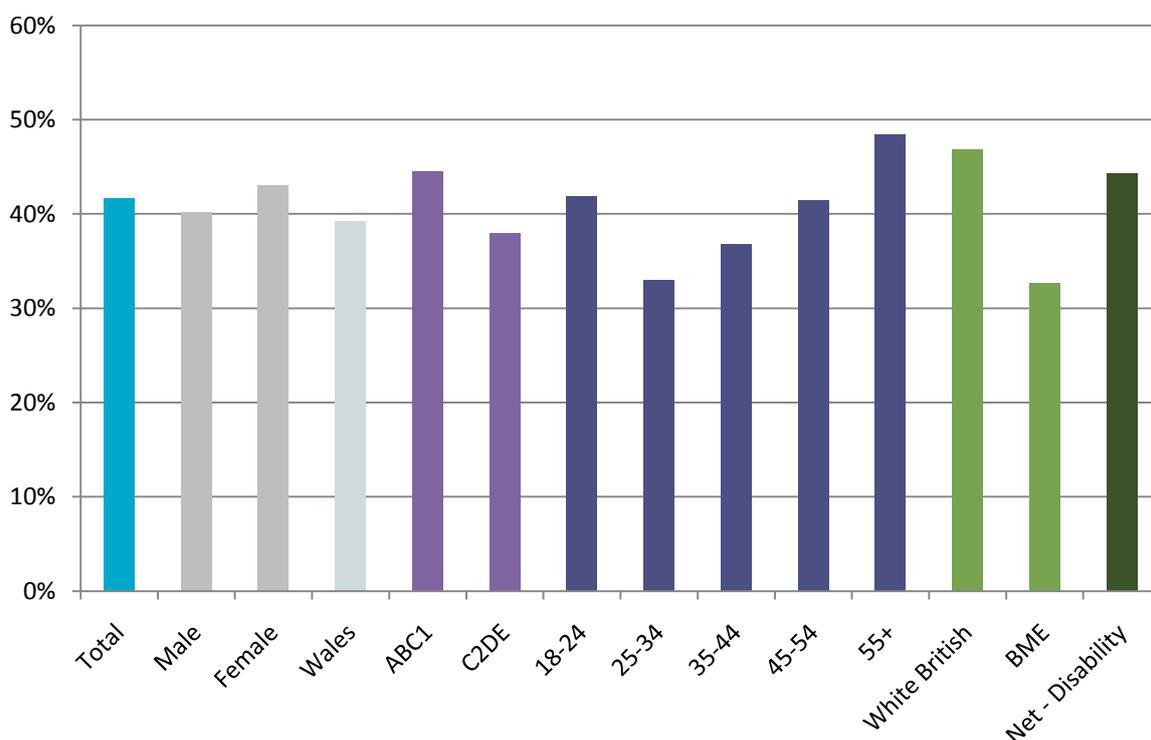


Chart 7 – Trust among BME groups, 2012-13

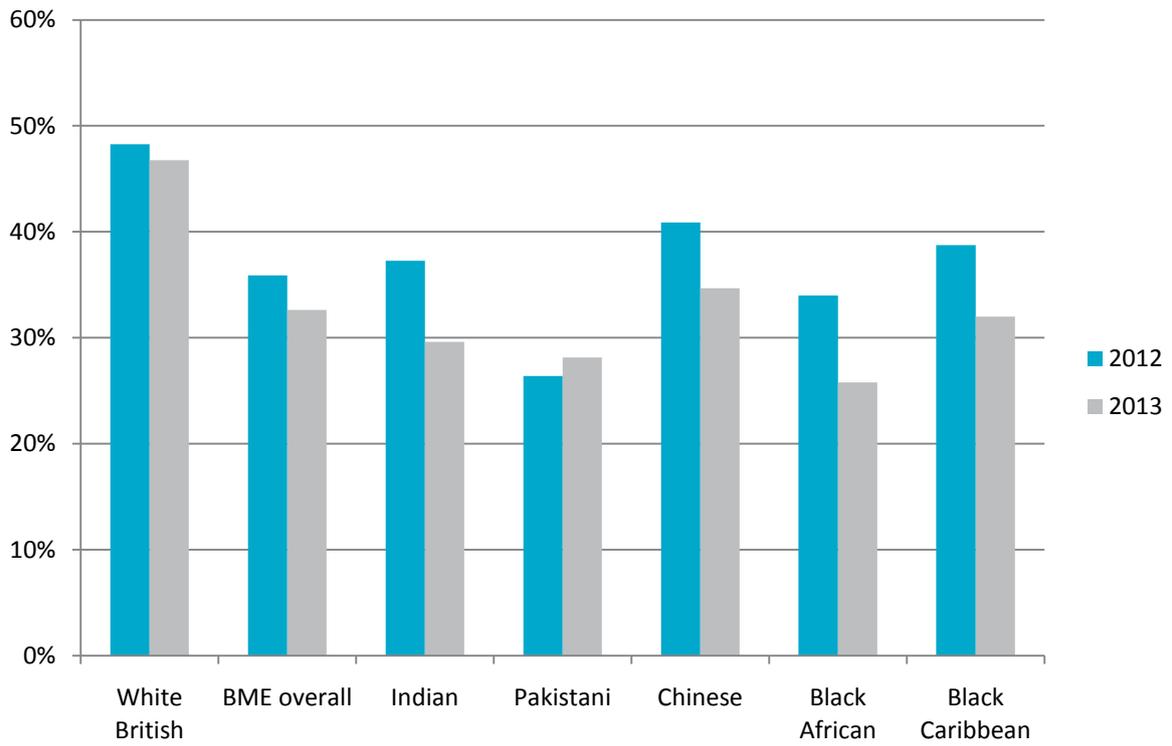


Chart 8 – Trust and knowledge/use of lawyers, 2013

