

# Tracker Survey 2015

## Briefing note: how consumers choose legal services

### Key findings:

- Five years of findings shows some clear trends in empowered consumer behaviours when choosing legal services, with reputation being the most important choice factor, followed by price
- The use of fixed fees remains most popular at 46% (the same in 2015 as in 2014), and perceived value for money also remains high at 61%
- Consumers satisfaction with choice continues to increase, and correlates with increased shopping around and a decline in difficulties comparing from 28% (2011) to 12% (2015)
- Much of this improvement however was confined to the more informed group; those with greater knowledge of what a lawyer does had greater levels of trust – 52% among those who had lots of knowledge, against 36% among those who felt they had no knowledge
- Consumers who didn't shop around also felt that they had less choice (67% against 86%) – and where they felt they had less choice they tended to be less satisfied (64% against 86%)
- Consumers who have used a legal service before tend to have more confidence in their rights being protected (57%) than those who have not (47%), however where someone has represented themselves there is less trust (47%) than those who have not (51%).

### Note on methodology:

*For the last five years the Panel has commissioned YouGov to conduct an annual survey in two parts: a nationally representative sample (1,794 adults); and a sample of people who have used legal services in the last two years (1,067 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 took place during 13 February – 13 March 2015.*

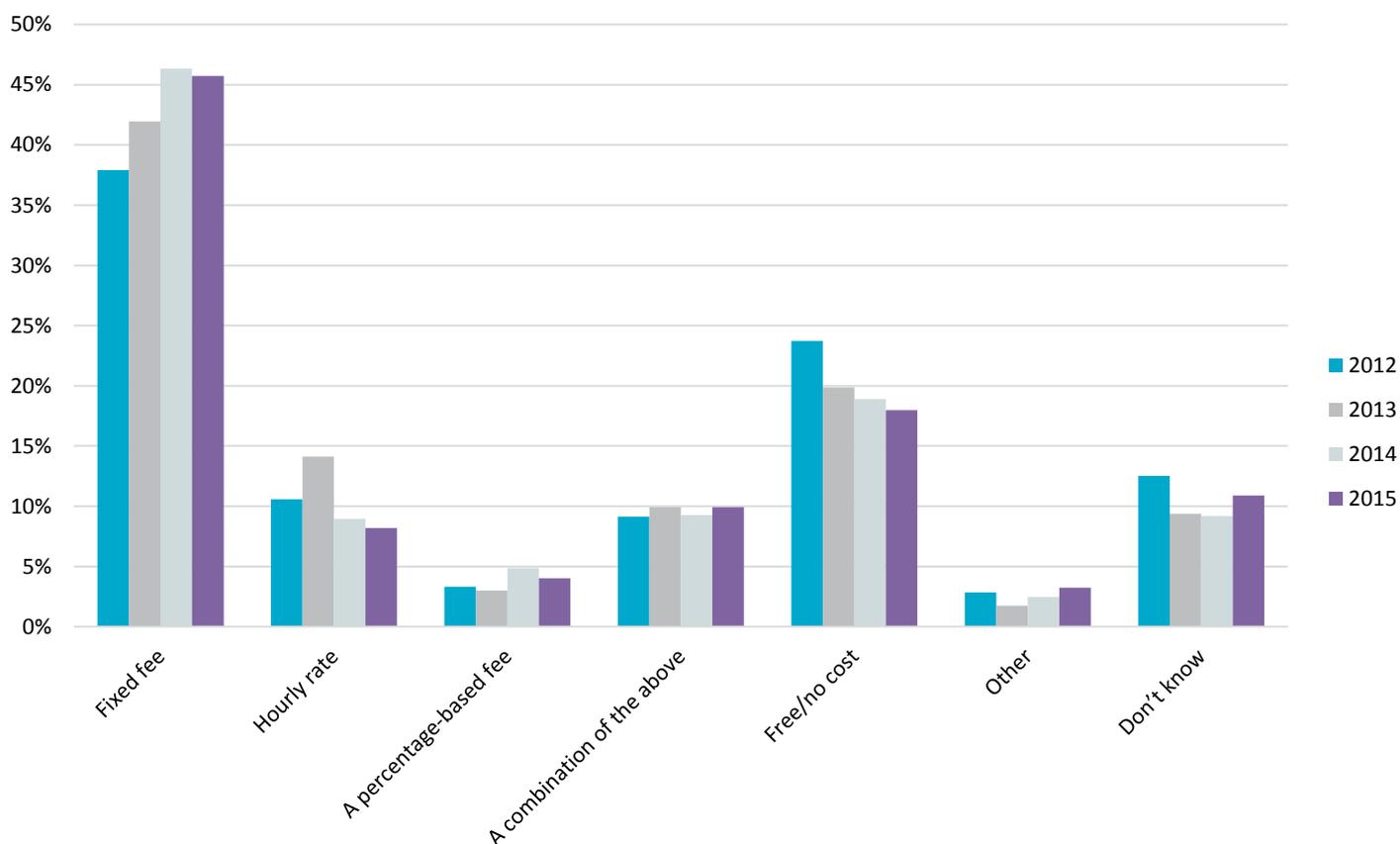
## Charging methods

Fixed fees remain popular, as they have in previous editions of our tracker survey briefings, while the hourly rate continues its decline. This is a positive indicator of competition and improves the potential for consumers to compare providers – as price was the second most important choice factor. We already know that some areas of law are more likely to feature fixed fee billing, and this remains the case. Conveyancing (68%), power of attorney (64%) and immigration (64%) all remain most common. Will writing has decreased on last year (71% down to 60%) as it sees a slight increase in free/no cost.

However this is matched by a decline in free services, which is a potentially worrying trend given recent cuts in legal aid. In terms of social split, ABC1 are more likely to report fixed fee billing (48%) whereas C2DE were more likely to have received free services (22% against 16%).

Personal injury was most highly reported to be free (54%) though elsewhere it is more often than not funded by insurance. The hourly rate remains most used in family (23%) and employment (19%).

This question was asked for the first time in 2012, so there is no data for 2011.



## Choice factors

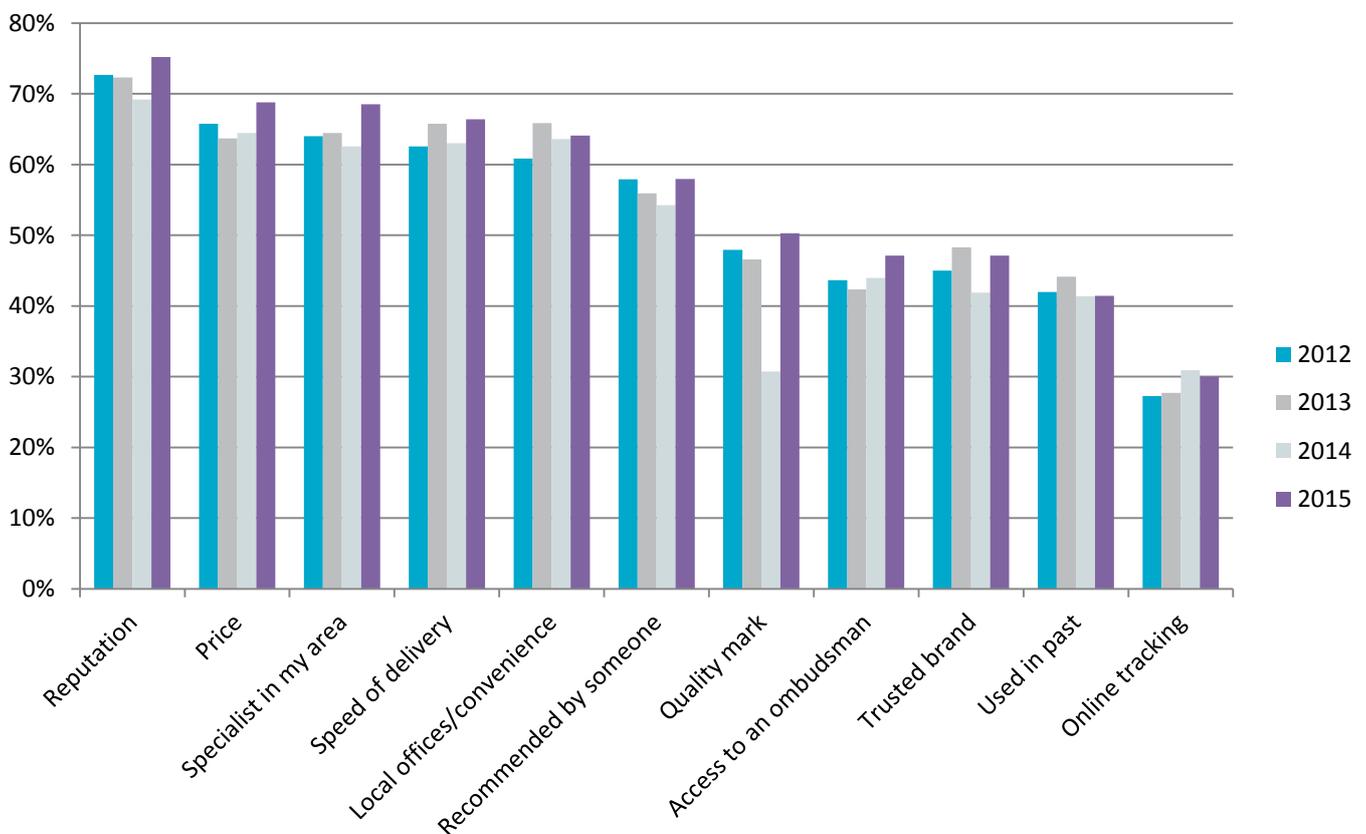
Reputation remains a key influencer when it comes to choosing legal services, perhaps emphasising the opportunity for comparison websites or trip-adviser style tools to really make their mark. Price is unsurprisingly a close second, which also plays into the previous chart which highlights the demand for fixed fee pricing – as this is easier to assess and compare when choosing a service.

The sharp increase in importance of a quality mark suggests that the 2014 data was an anomaly, and confirms that external validation of a provider’s service is an important factor.

These factors do differ between types of law: in conveyancing, price is the most important factor, whereas in will-writing, probate and power of attorney, it’s the convenience factor that matters most. And in family, it is speed of delivery which takes precedence, followed closely by specialism and convenience of offices.

We can also look at this against how people searched for their providers; where price was the most important factor in choosing, consumers were more likely to use a comparison website to find their provider. Where reputation was an important factor, consumers were most likely to know someone that worked there.

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## Trust trends

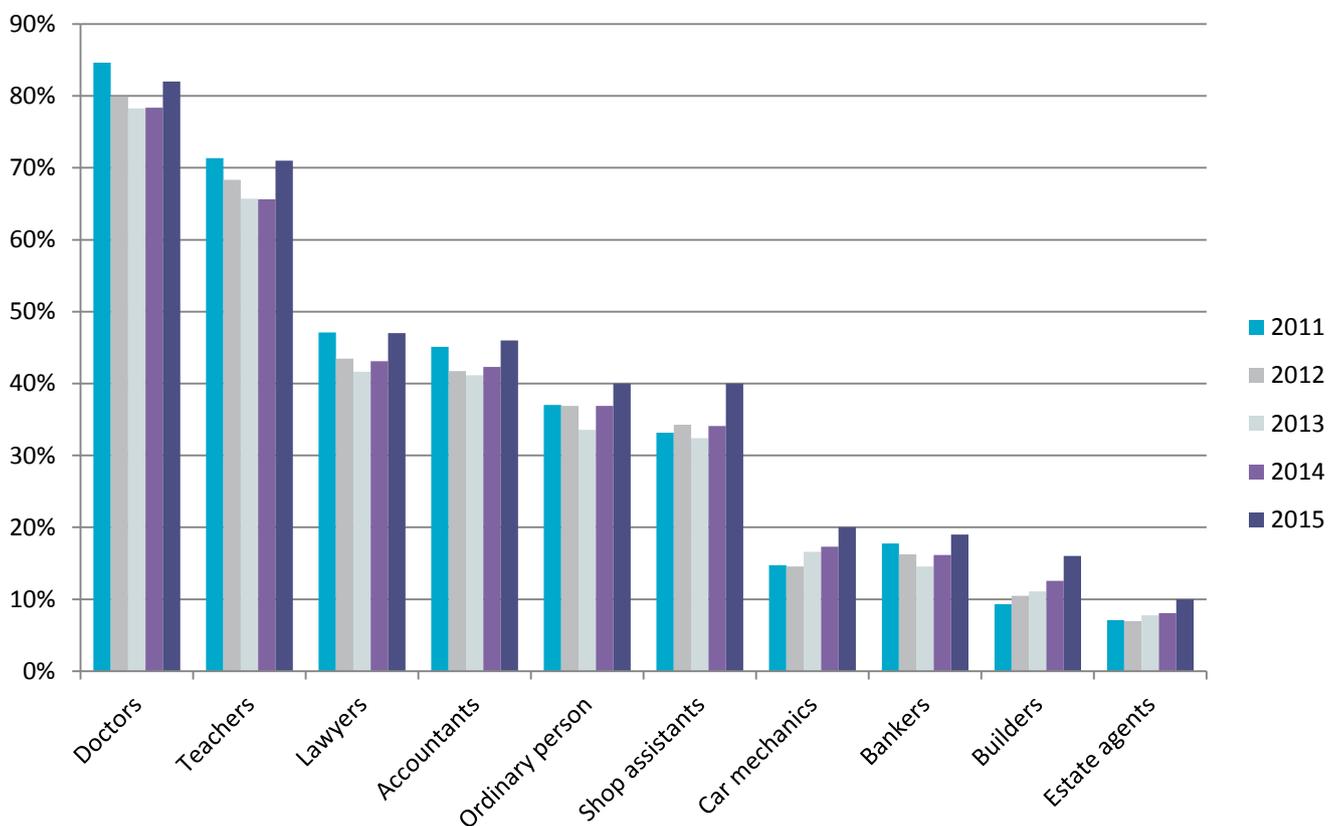
The Tracker Survey uses three measures to test public confidence: trust in lawyers to tell the truth, whether people feel their consumer rights would be protected when using lawyers, and confidence about complaining to a lawyer.

We can look at whether or not having used a legal service before impacts these measures, and it's clear there are some variations. Those who have used a legal service are more likely (49%) to trust than those who have not (44%) but there's no significant difference among those who represented themselves in court or not (47%, 46%). Consumers who have used a legal service before tend to have more confidence in their rights being protected (57%) than those who have not (47%), however where someone has represented themselves there less trust (47%) than those who have not (51%). Those who have used a legal service are more confident in complaining than those who have not (52% against 46%).

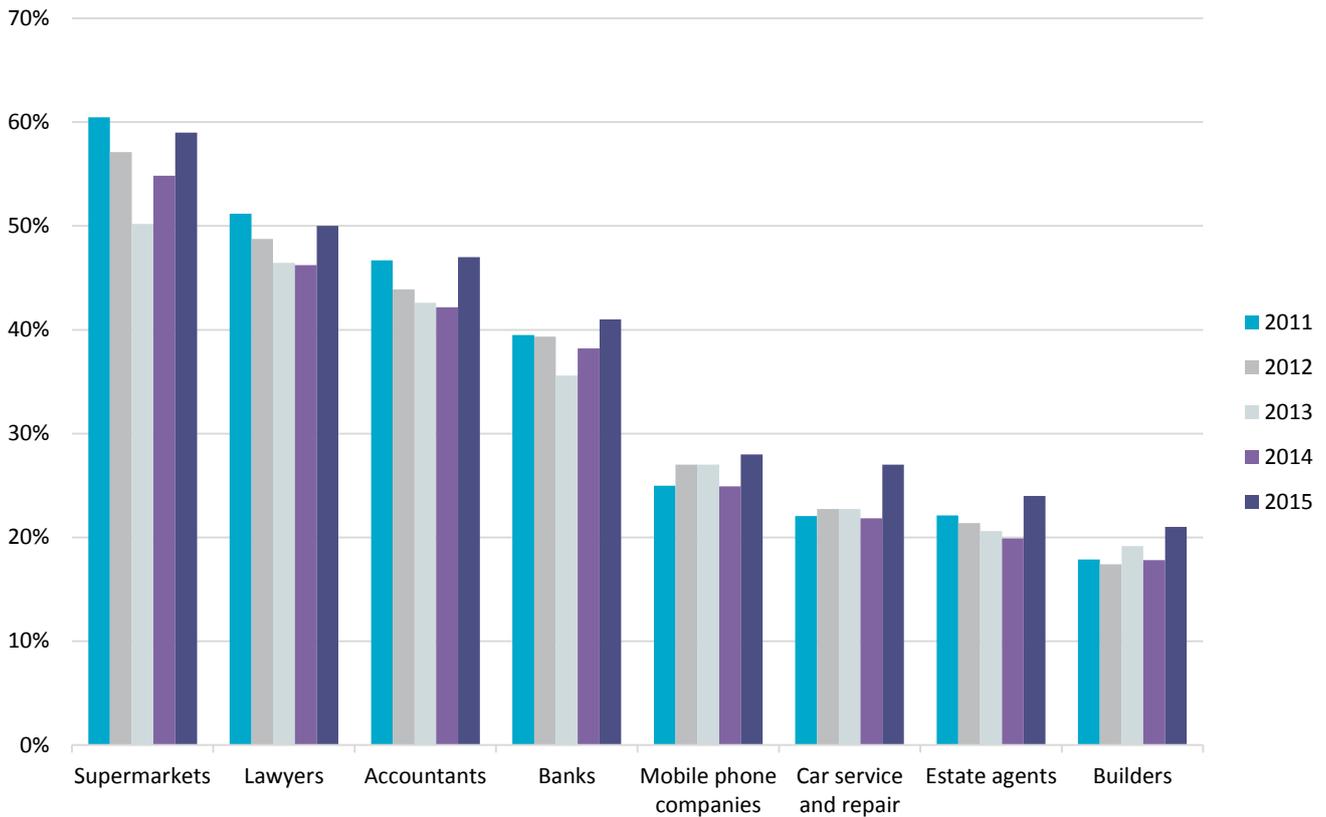
Demographic differences remain, as we have observed in previous years. The gap in trust between White British (48%) and BME (43%) has closed a little, but this is largely due to a slight decline in trust among White British from 50% in 2014. Confidence remains higher among White British (52%) against BME (47%). BME tend to be less confident (45%) than White British (50%) in making a complaint, however looking further into the data Black African and Black Caribbean are most confident in complaining (52% and 51% respectively).

In all three measures it remains that there are higher levels of confidence among ABC1s, women, and older age groups – though the gaps are narrowing.

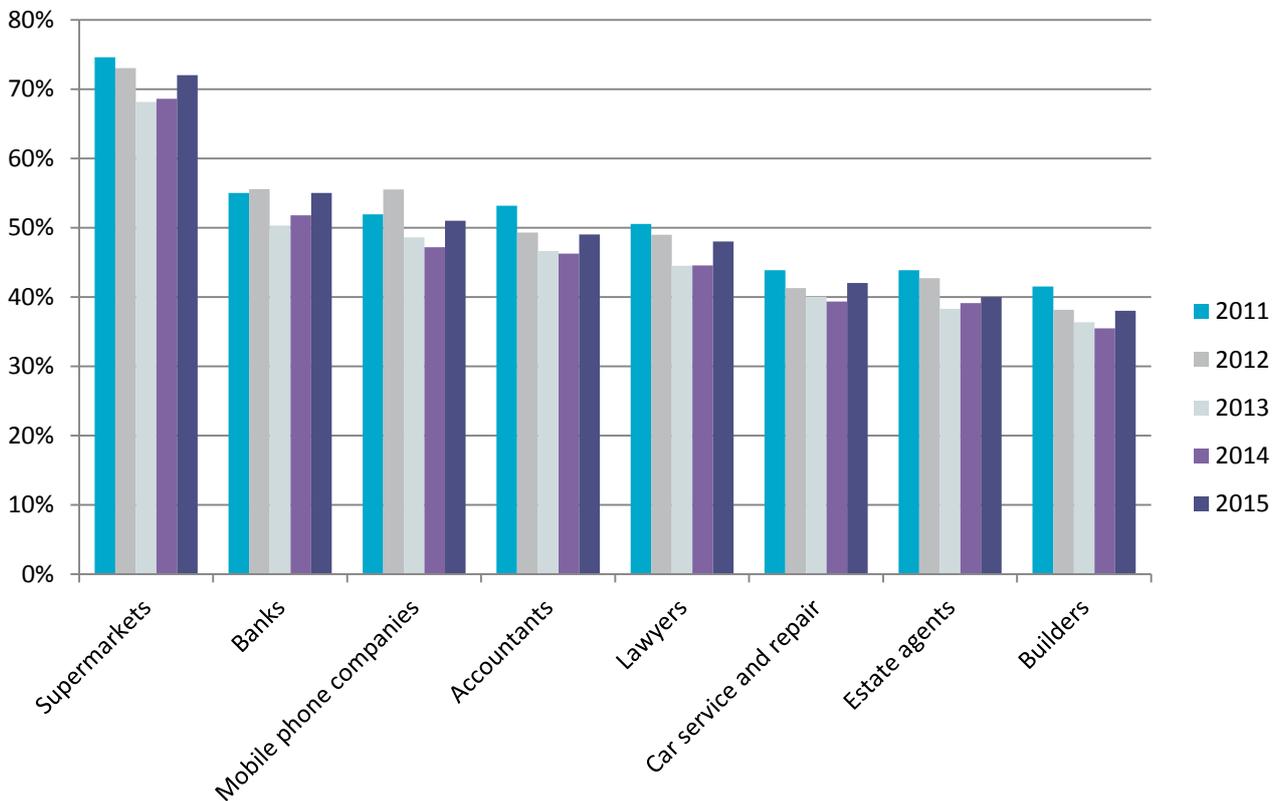
**Chart 1 - Trust trends**



**Chart 2 - Confidence that consumer rights will be protected**



**Chart 3 - Confidence in complaining**



## Consumer behaviour

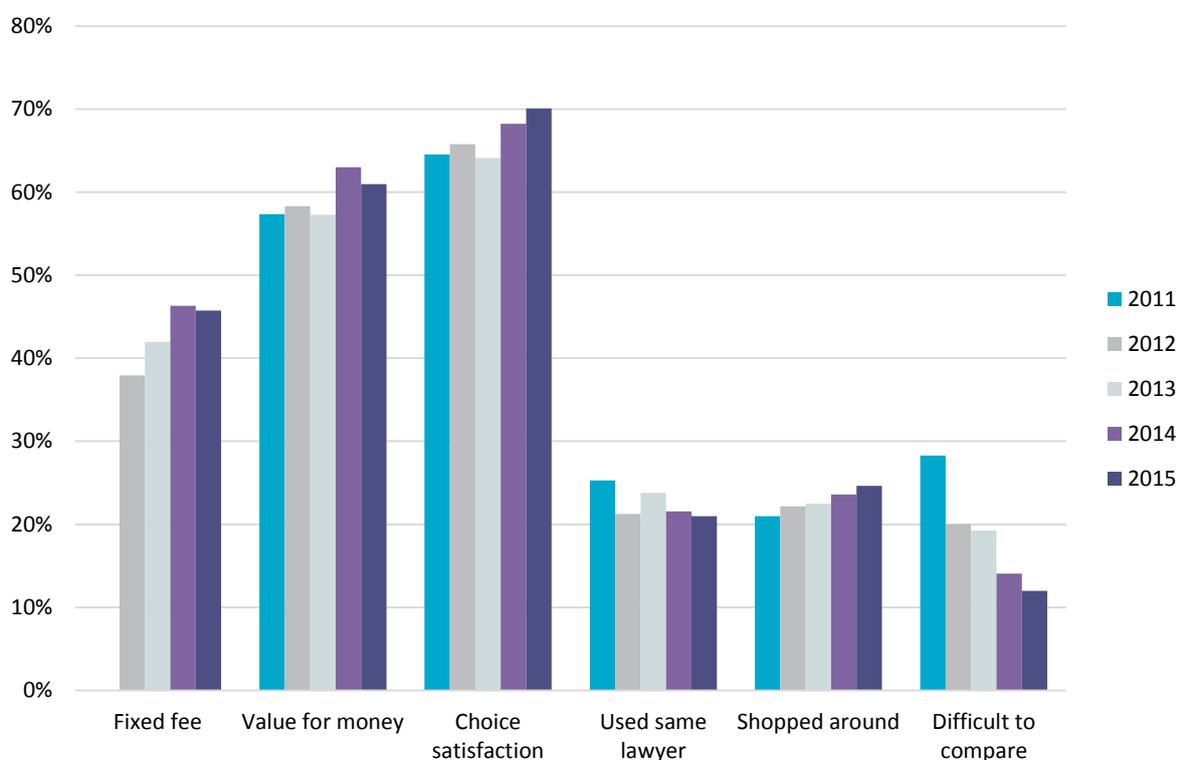
Overall there are positive signs that the market is improving for active consumers. An increase in fixed fees signals a continuing growth in competition, and choice satisfaction has increased over the last five years from 65% to 70%. Satisfaction with most elements of service, from clarity of explanations to professionalism, was up on previous years.

Similarly, the number of consumers relying on the same lawyer is creeping down, while those shopping around creeps up – slow but welcome progress. This still means however that nearly 80% of consumers are relying on the same lawyer, and 75% are not shopping around at all.

For those who are shopping around, ease of comparison has increased considerably which is a positive sign. Consumers who shopped around generally felt they had more choice (86% against 67%), and where consumers felt they had a choice they tended to be more satisfied (86% satisfied they had a choice against 64%).

Value for money was felt most highly in will writing at 74%, however despite a peak in 2013 of 78% it is far closer to the 2011 figure of 73%. Other than will writing though, there has been a general increase in perceived value for money across most areas of law, particularly in conveyancing (2011: 49%, 2015: 66%) power of attorney (2011: 49%, 2015: 64%) and housing (2011: 55%, 2015: 70%).

Fixed fee data was not available in 2011.



## Types of firm

Last year we asked a new question about what type of law firm consumers chose to use across the different types of law. Acknowledging that respondents may not identify the type of firm consistently or accurately, the results offer indicative findings.

Similar to last year, the results show that small local firms are the most popular choice still, which is unsurprising given that face-to-face delivery remains the most common method. But a change on last year is the increase in use of national brands and large corporate firms in personal injury, which have risen from 12% to 29% and 21% to 26% from 2014 respectively.

The demographic differences remain similar to 2014 also, with older respondents favouring the smaller local firm, and younger respondents using online-only organisations.

