

# Tracker Survey 2015

The logo for the Legal Services Consumer Panel is a blue circle containing the text "LEGAL SERVICES CONSUMER PANEL" in white, stacked vertically.

LEGAL  
SERVICES  
CONSUMER  
PANEL

## Briefing note: how consumers use legal services

### Key findings:

- Consumer use of legal services continues to indicate changing responses to a developing market.
- Face-to-face service delivery remains the most common with just under half of all transactions using this method, though there is evidence of a gradual increase in use of telephone services and the use of email/internet
- The most relied upon funding method is increasingly private funding (64%), with a dip in reliance on legal aid that sees it return to 2011 figures (5%), and a continued decline in free services (down to 9% in 2015 from 11% in 2013)
- This points to a problem for those more vulnerable consumers, who are potentially being left behind as those more empowered are able to take advantage of market changes
- The number of silent sufferers has decreased slightly from 44% to 42% - however so has the number of those who made a formal complaint to their provider.

### 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.*

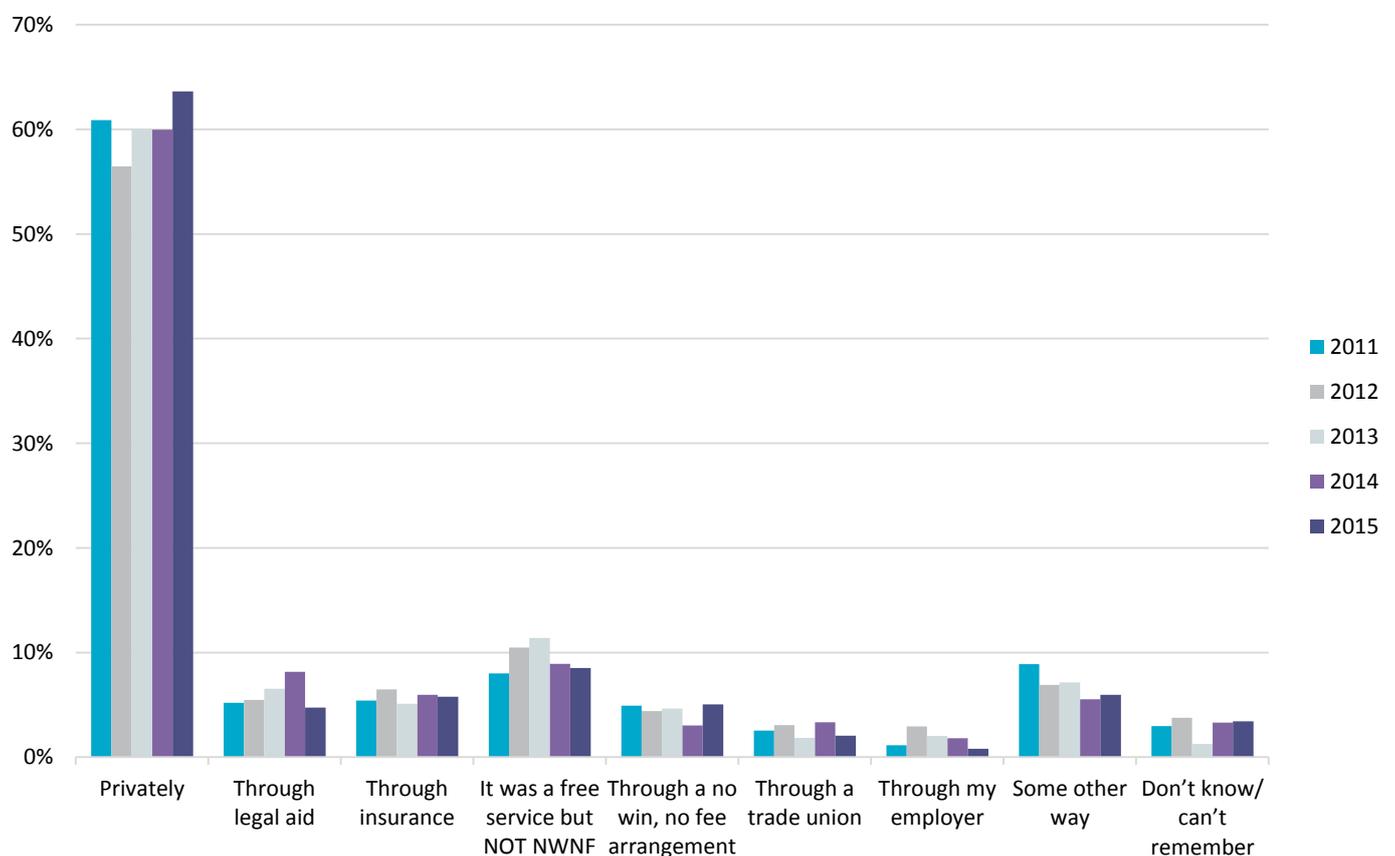
## Methods of funding

Private funding has always been the most relied upon method, but the data suggests this is increasingly the case. Up 3% since 2011, it is difficult to infer too much without knowing any more about this source – i.e. whether it was from savings, on credit, or with the support of family and friends. Power of Attorney and Conveyancing are predominantly privately funded (90% and 92% respectively), with will-writing (82%) and probate (78%) close behind.

In other areas of law we see varying patterns of funding: personal injury is still largely funded by NWNF arrangements (46%) or insurance (31%), whereas family law remains the area where most legal aid funding is focused (20%). Free services were most frequently found in personal injury (10%), will-writing (8%) and family law (7%), as was trade union funding.

The data suggests a significant drop-off in the use of legal aid this year – it may be shown in next year’s data that this is an anomaly, but it would correlate with recent cuts in legal aid availability. Looking further at the demographics, younger respondents are the age group most reliant on legal aid (22%), C2DE rely more on legal aid than ABC1 (9% against 3%), and Black African (15%) and Black Caribbean (11%) are the largest ethnic groups to use legal aid.

Free and privately funded legal services are more likely to be delivered face to face (59% and 53%), whereas those covered by insurance are more likely to be done over the telephone (29%) or email/internet (38%), similarly where it is a NWNF service (34% and 33%).



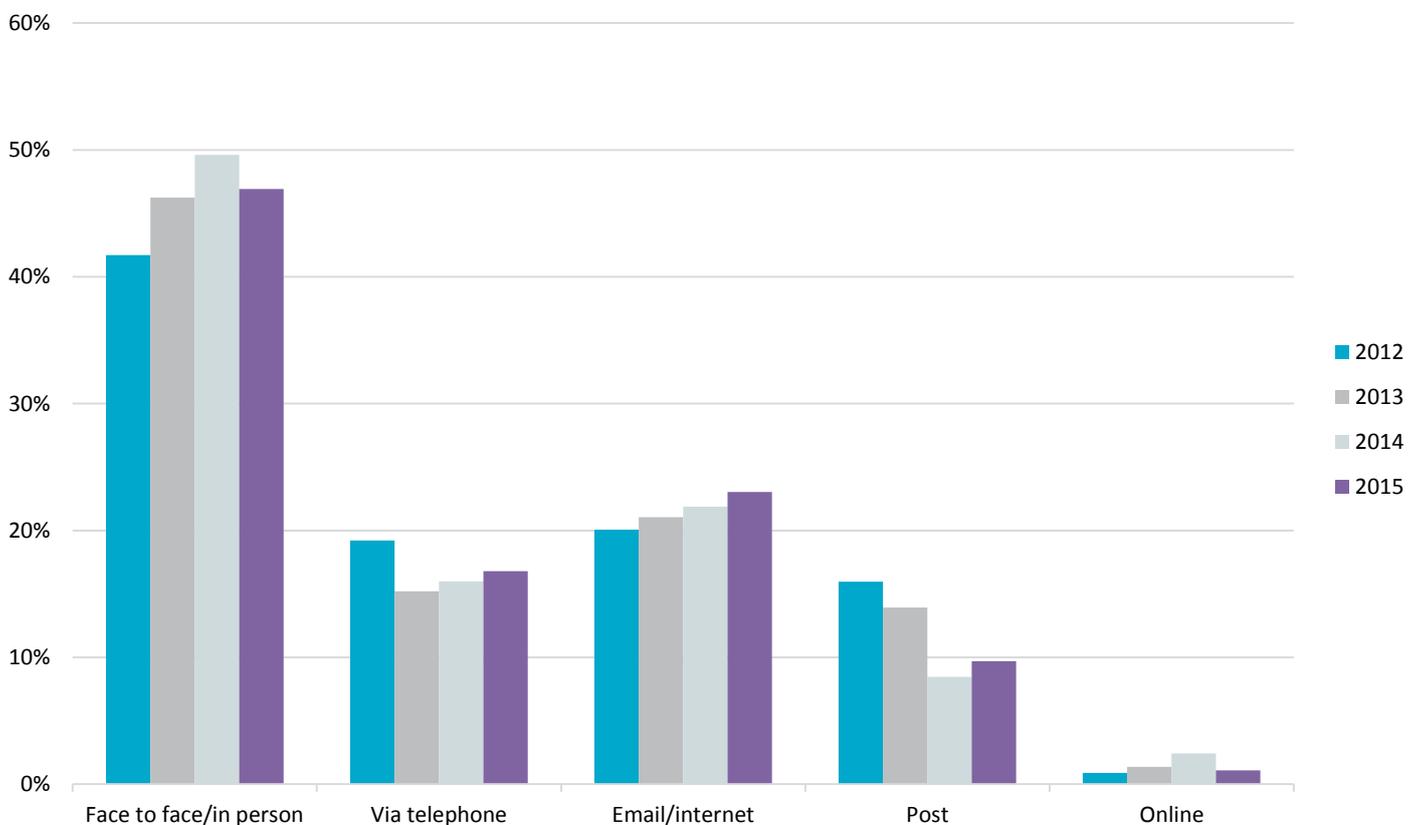
## Delivery of legal services

The delivery of legal services reflects changing consumer expectations and service developments. While face-to-face service delivery remains the most used, there is a definite increase in other channels such as telephone and email/internet. This represents the increasing demand for more convenient services, particularly given two thirds of the population now own smartphones, and of these 81% use them for emailing and 77% for general web browsing.<sup>1</sup>

By areas of law, will writing, power of attorney, and immigration matters are most likely to be dealt with face to face. On the digital end, personal injury and consumer problems are most likely to be dealt with by telephone, whereas conveyancing is most likely to be dealt with over email/internet.

Perhaps unsurprisingly, other data in the Tracker Survey suggests that those who searched for a firm online were more likely to deal with the firm over email (40%) rather than in person (33%), and similarly where they had been referred by another organisation (35% used email/internet against 23% face to face).

Looking at the demographics the data shows that there are no significant variations between social grades, though ABC1 are more likely to use email/internet (24%) than C2DE (20%). There is no discrepancy between White British and BME



<sup>1</sup> OfCom, The Communications Market Report 2015

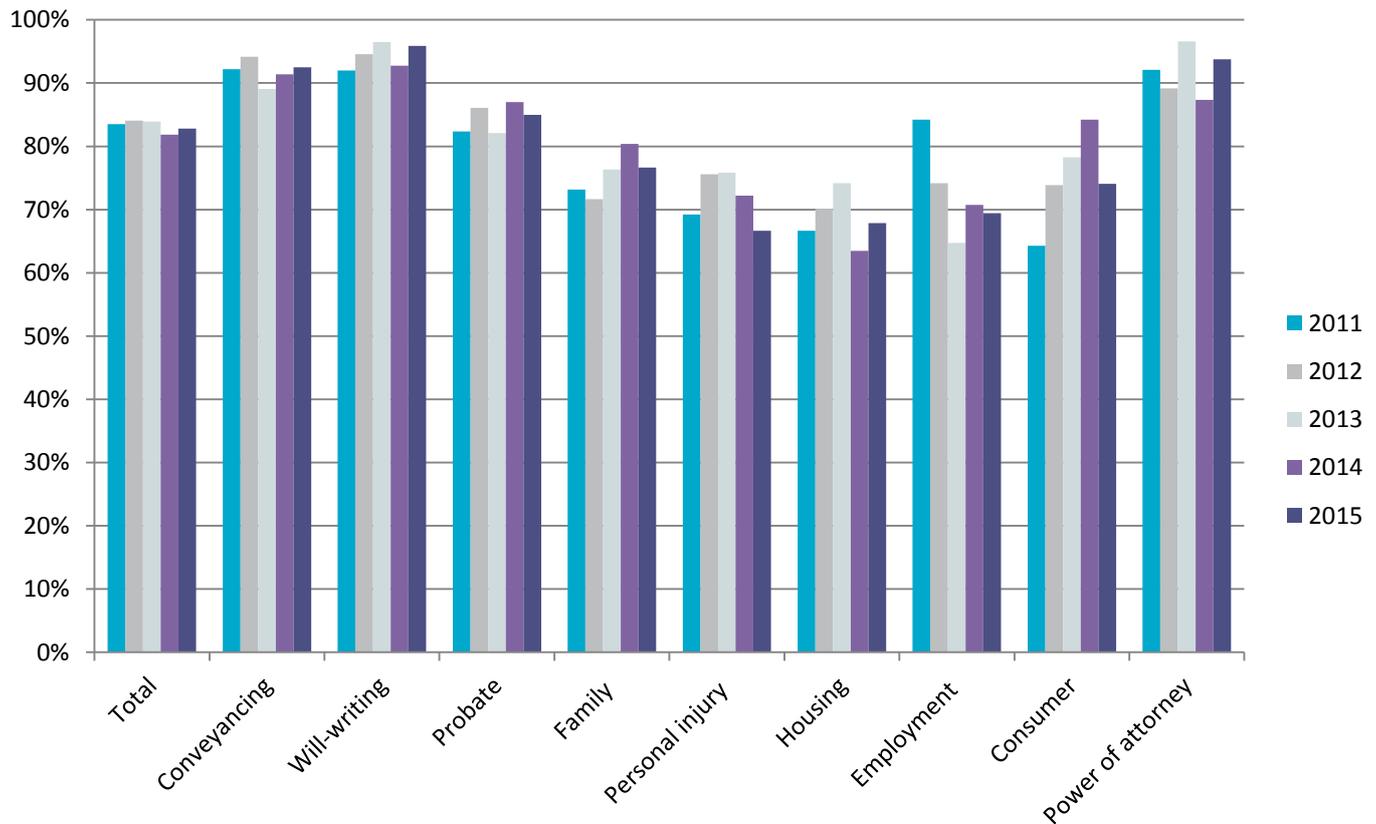
## Outcome satisfaction

The Panel asks consumers how satisfied they are with the outcome of their legal matter. We can expect that satisfaction with outcomes will be lower in more contested areas where there is a clear 'winner' and 'loser' compared to more transactional areas.

Generally satisfaction with outcome remains quite high across the board and has improved overall, reflecting a continued high level of satisfaction with service. There were some decreases in consumer, personal injury and family, as well as probate and employment. Satisfaction has increased in power of attorney and will writing.

The biggest discrepancies between service and outcome are in conveyancing (92% happy with outcome, but 80% happy with service) and probate (85% happy with outcome, and 78% happy with service). Elsewhere such as employment, satisfaction was higher with the service rather than the outcome, whereas for family and immigration, satisfaction with the outcome was met with equal satisfaction with service.

In terms of the demographics, White British felt higher levels of satisfaction with outcome (88%) compared against BME (74%), a trend reflected in satisfaction with service too. There was no discrepancy between ABC1 and C2DE in either. The 55+ age group were more satisfied with the outcome (87%) than any other age group (average 79%)



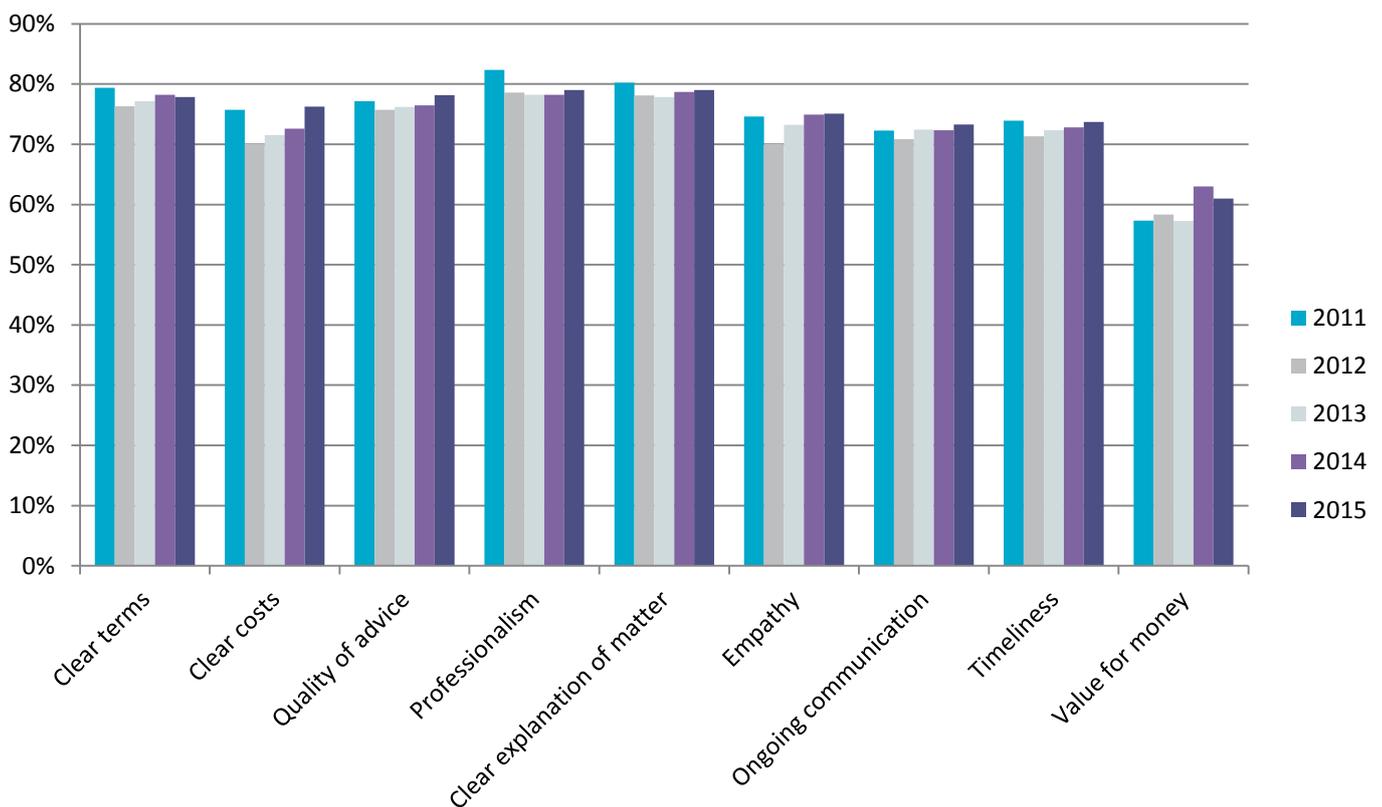
## Service elements

Overall levels of service elements have remained high and static over the last five years, with 78% satisfied with service.

Using previous LSB research asking people what matters to them, we ask consumers to rate different elements of customer service. The differences are small, but these indicators show slight increases in value for money and clarity of costs over the last four years.

More detailed analysis reveals some possible influences on these indicators, for example;

- Where consumers chose a service they had used previously, there are higher levels of satisfaction;
- Services that were privately funded or funded by legal aid were also seen to relate to higher satisfaction, whereas satisfaction was lower in cases that were funded by insurance or NWNF
- Choice and shopping around also correlate to higher levels of satisfaction.



## Possible influences on service satisfaction

