

# Tracker Survey 2013

## Briefing note 2: Shopping for legal services

### Key findings:

- Consumers are more satisfied with the service they receive and consider they get better value for money if they shop around
- But levels of shopping around are unchanged since last year, at 22%
- Choice tools are still little used by consumers – 1% use a price comparison website, 2% a customer feedback website and 4% an accreditation scheme
- Reputation, location, specialist knowledge and speed of delivery all matter more than price in factors influencing people's choice of lawyer
- The most common route to finding a provider is to go back to a lawyer used before – this leads to the highest levels of service satisfaction, although an internet search has similar satisfaction ratings. Referral by a company and responding to an advertisement lead to the lowest service satisfaction ratings

### **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.*

## Shopping around

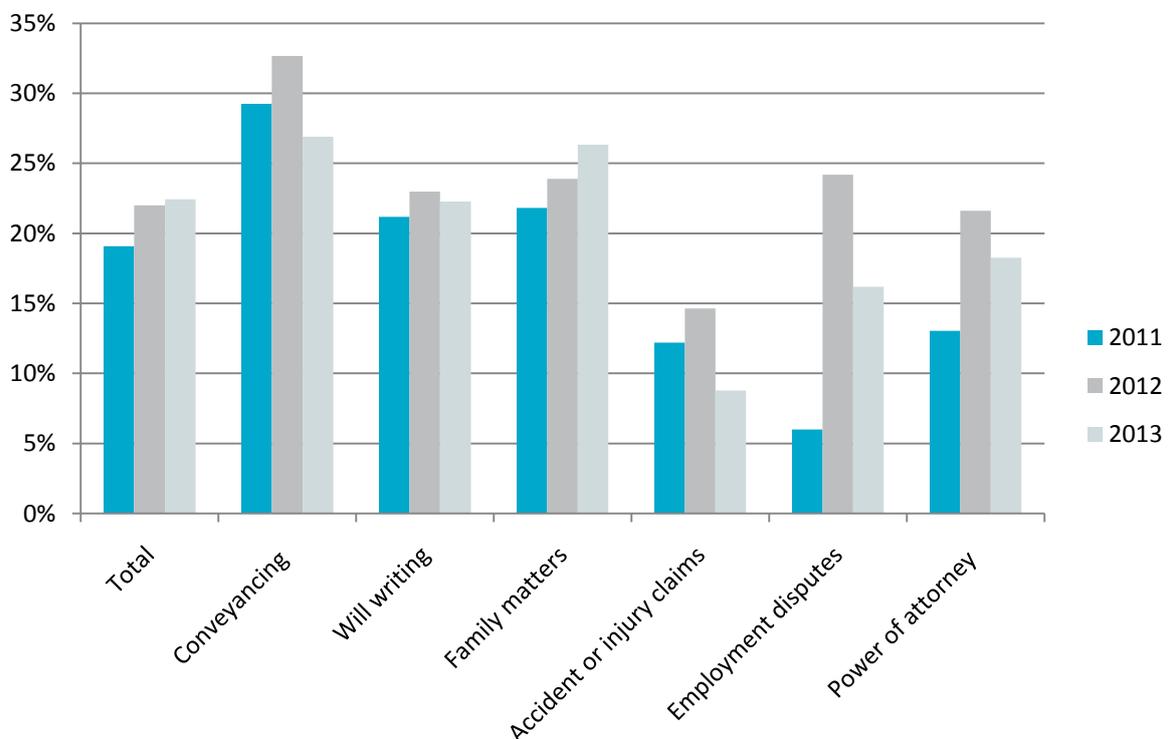
Levels of shopping around have remained the same at 22%. The degree of shopping around varies depending on the area of law and the data indicates this is increasing in some areas and decreasing in others. The figures should be seen in the context of market developments, e.g. shopping around in conveyancing can be expected to reduce if there are more mortgage deals including free legal work. The year-on-year rise in family law is salient given the rise in fixed fee deals in this area (see briefing note 1).

There are some surprising demographic differences: C2DEs are more likely to shop around than ABC1s (25% v 21%) and BME more than White British (34% v 17%).

There is some evidence that consumers benefit when they shop around: they are more likely to be satisfied with value for money (65% v 56%) and service (89% v 79%). However, just 55% of consumers who shopped around found this easy.

As might be expected, shopping around is more common among consumers who state that price is an important factor in their choice of lawyer (83% v 59%).

**Chart 1 – Shopping around, 2011-13**



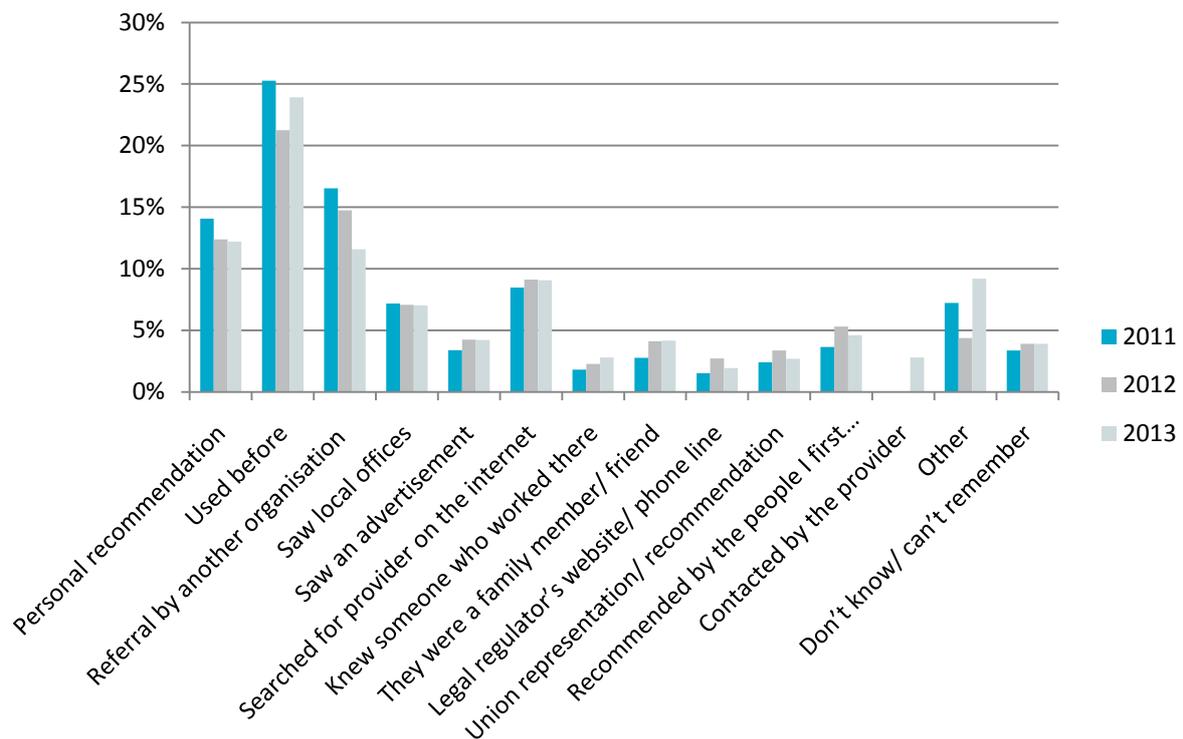
## Finding a lawyer

The most common route to finding a provider is to go back to a lawyer used before. Personal recommendation and referral by a company (e.g. estate agents or insurers) are also common routes. Searching for a provider on the internet has risen slightly over the three years the survey has been running but still stands at less than 10%.

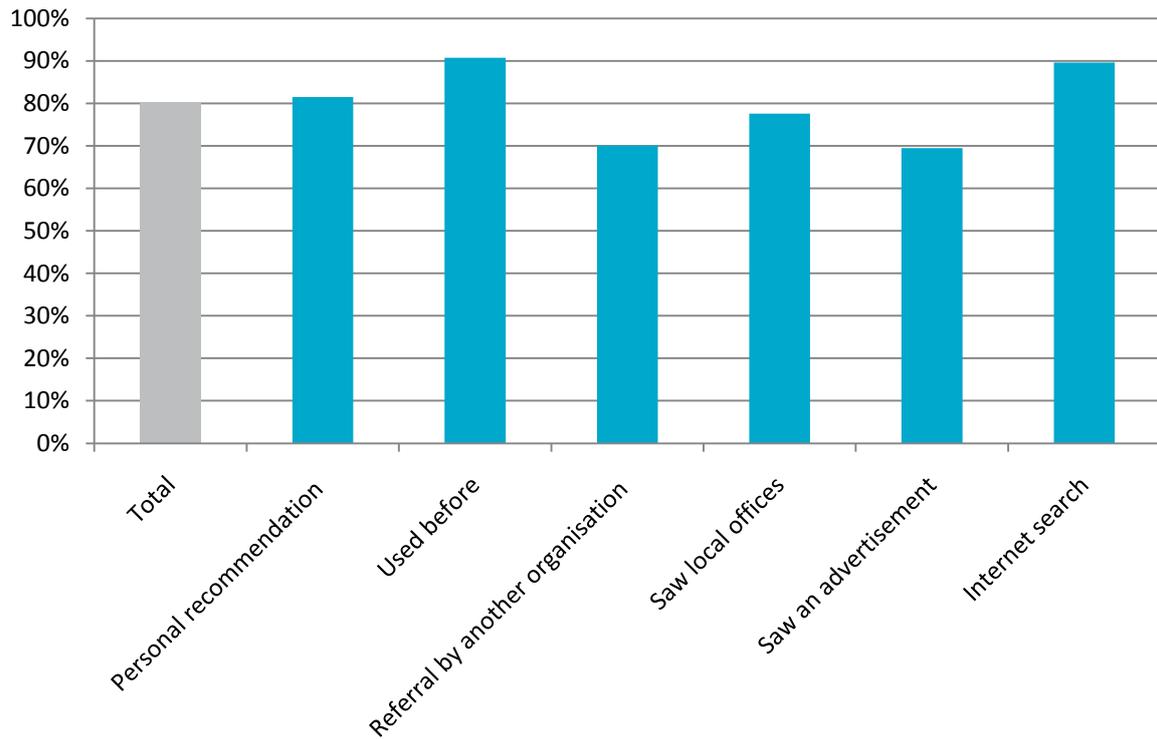
Familiarity appears to be a reliable choice method as levels of service satisfaction with providers used before are 91% compared to an average of 80%. However, using a provider found after an internet search produces similar results. The least reliable search methods are referral from a company and responding to an advertisement, although this may partly reflect the type of legal work (e.g. personal injury).

Choice tools are still little used by legal services consumers. 4% of consumers used an accreditation scheme to help find a lawyer and 1% a price comparison website – both figures are unchanged from last year. In 2013 for the first time we asked consumers whether they had used a customer feedback website - 2% had done so in legal services.

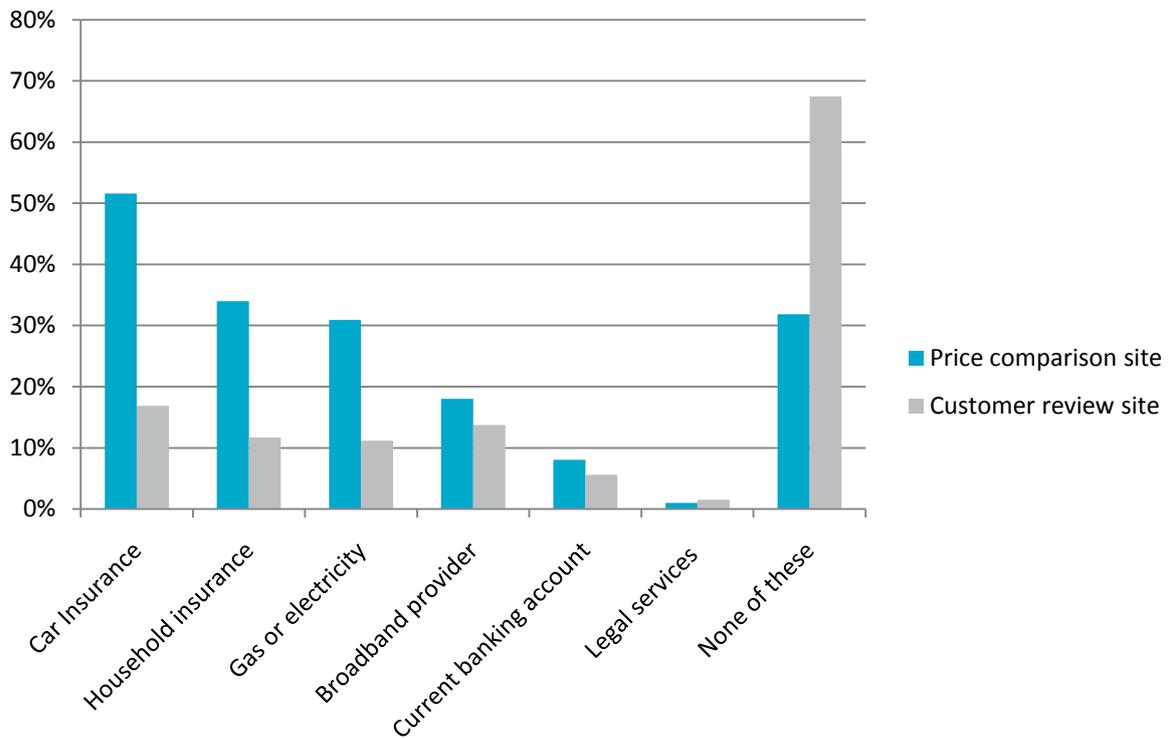
**Chart 2 – Choice methods, 2011-13**



**Chart 3 – Satisfaction and selection method, 2013-04-30**



**Chart 4 – Use of comparison websites, 2013**

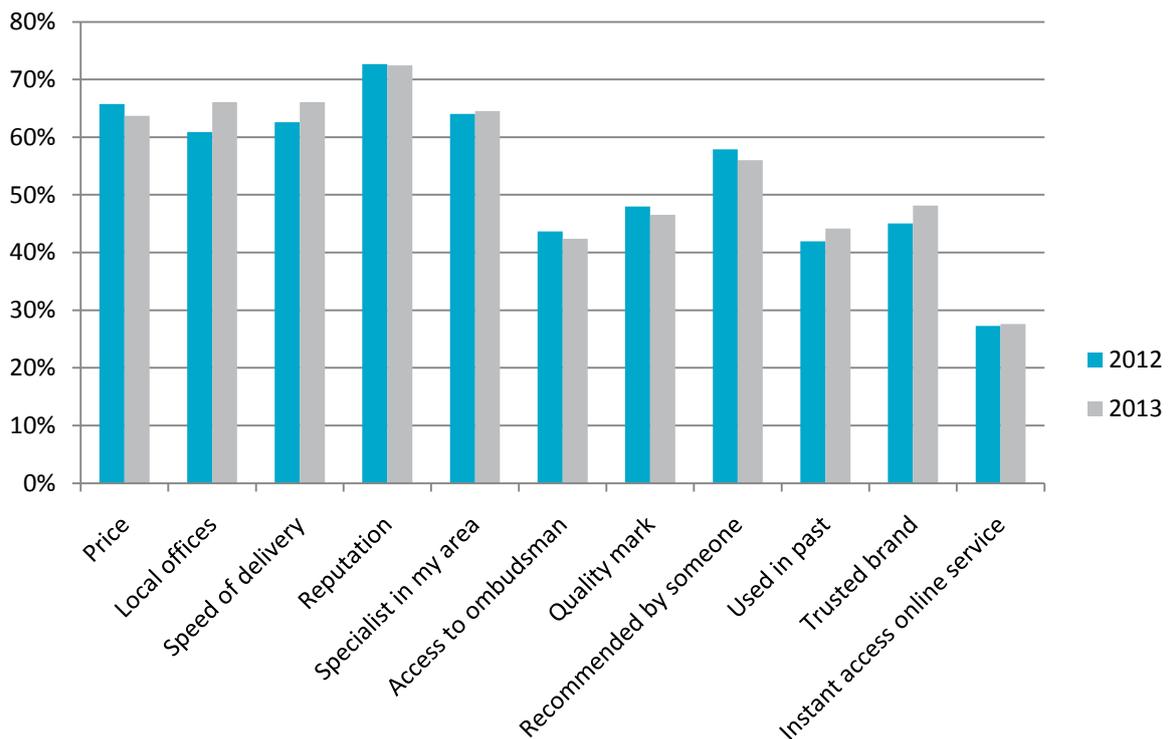


### Choice factors

A wide range of factors influence choice of legal services provider. Reputation is the most important of these, mentioned by 72% of consumers. Price was the 5<sup>th</sup> most often stated factor and was mentioned slightly less than 12 months ago – quality, location and service quality are all seen as at least of equal importance. The influence of reputation is also the highest ranked when consumers are asked to nominate which choice factors were very important to their decision, whereas speed of delivery is more likely to be seen as fairly rather than very important. Local offices and specialist expertise are the second and third highest factors in terms of high importance.

The mix of choice factors varies depending on the type of legal work. For example, price is a more significant factor for conveyancing than in other areas of law, whereas location is a more significant factor for family work. This is logical: conveyancing is seen as a more routine transaction that can be delivered remotely, whereas family matters are more sensitive and consumers are more likely to value the personal touch.

**Chart 5 – Choice factors, 2012-13**



**Chart 6 – Choice factors by area of law, 2013**

