Tracker Survey 2013

Briefing note 3: Satisfaction with legal services

Key findings:

- Service satisfaction is the same as last year, but up across the three years the Tracker Survey has been running
- Information on costs, timeliness and communication are the worst rated elements of customer service
- Only 57% of consumers are satisfied with value for money; this tracks well behind satisfaction with other service features
- Will-writing is rated highest for value for money and probate the lowest
- Consumers are significantly less satisfied with the service they receive from their lawyer when the work is funded through insurers

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.

Service satisfaction
Overall levels of service satisfaction are about the same as last year, at 80%. ABC1s are happier than C2DEs, but not by a wide margin. However, the gap between White British and BME satisfaction is far greater, at 10%. Satisfaction has increased at the same rate across the population over the three years of the survey.

Generally consumers are happier with the outcome of their legal work than with the service they received. Differences in satisfaction with outcome can be expected to vary across areas of law as some legal work is contested while other areas are more routine. Yet the relationship between outcome and service satisfaction is not straightforward. In employment cases satisfaction with service is rated higher than outcome, but in personal injury it is the other way around. This may suggest consumers can recognise good levels of service even when losing their case or blame factors, such as 'the system', other than their lawyer's work. We should recognise that in most legal matters there is another party involved, the mystique of law with which to bamboozle consumers, and in a not insignificant part there is the courts and tribunals system to contend with.

Over the three years of the Tracker Survey, satisfaction has improved across all areas of law except conveyancing and personal injury which have remained static. Will-writing and family law have seen the sharpest growth in satisfaction.

Chart 1 – Satisfaction across population, 2011-13

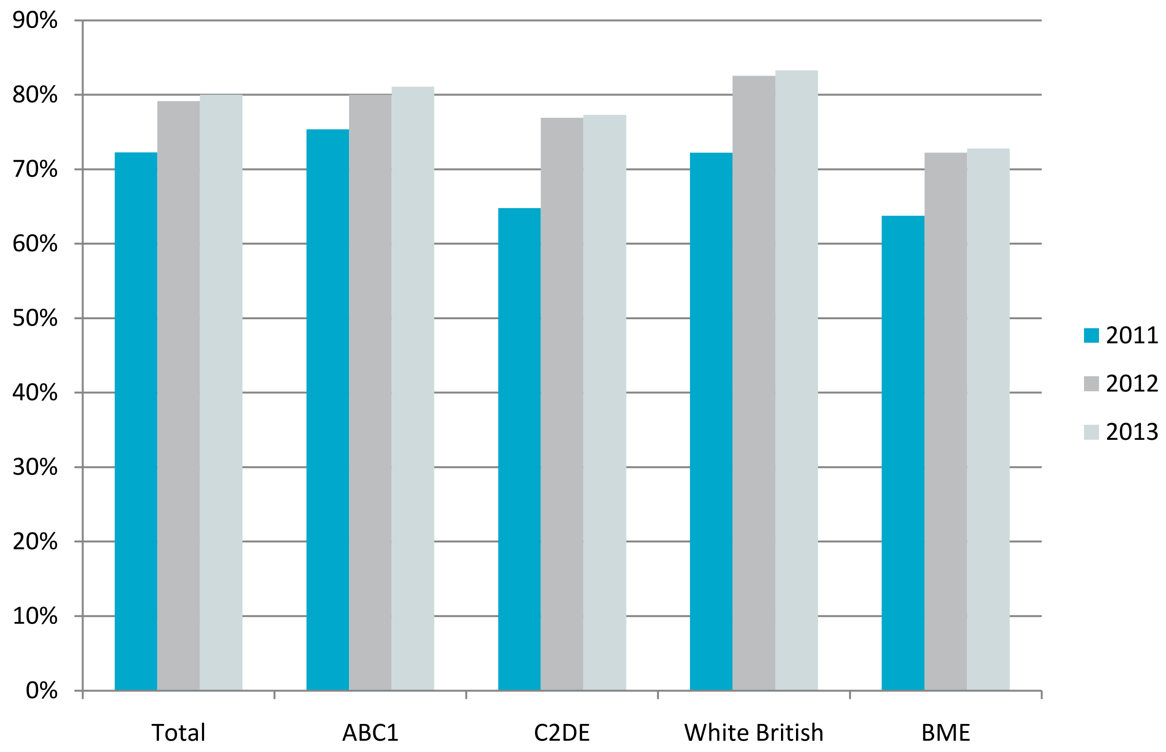


Chart 2 – Satisfaction with outcome and service by area of law, 2013

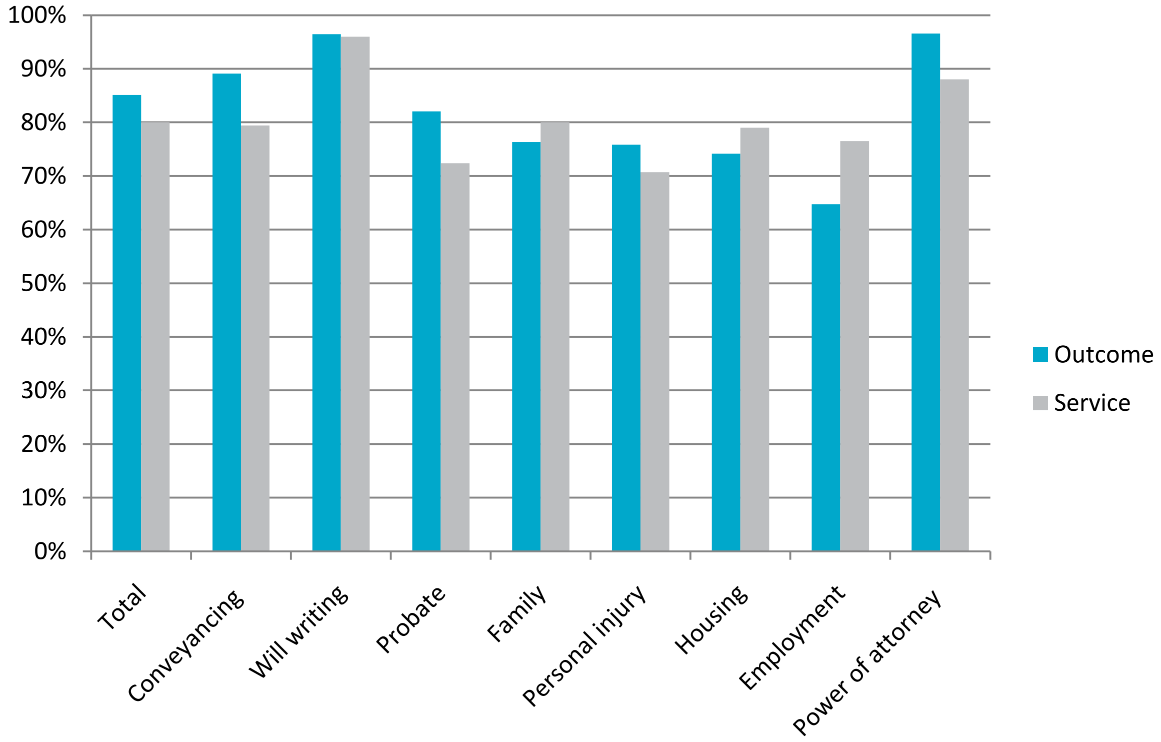
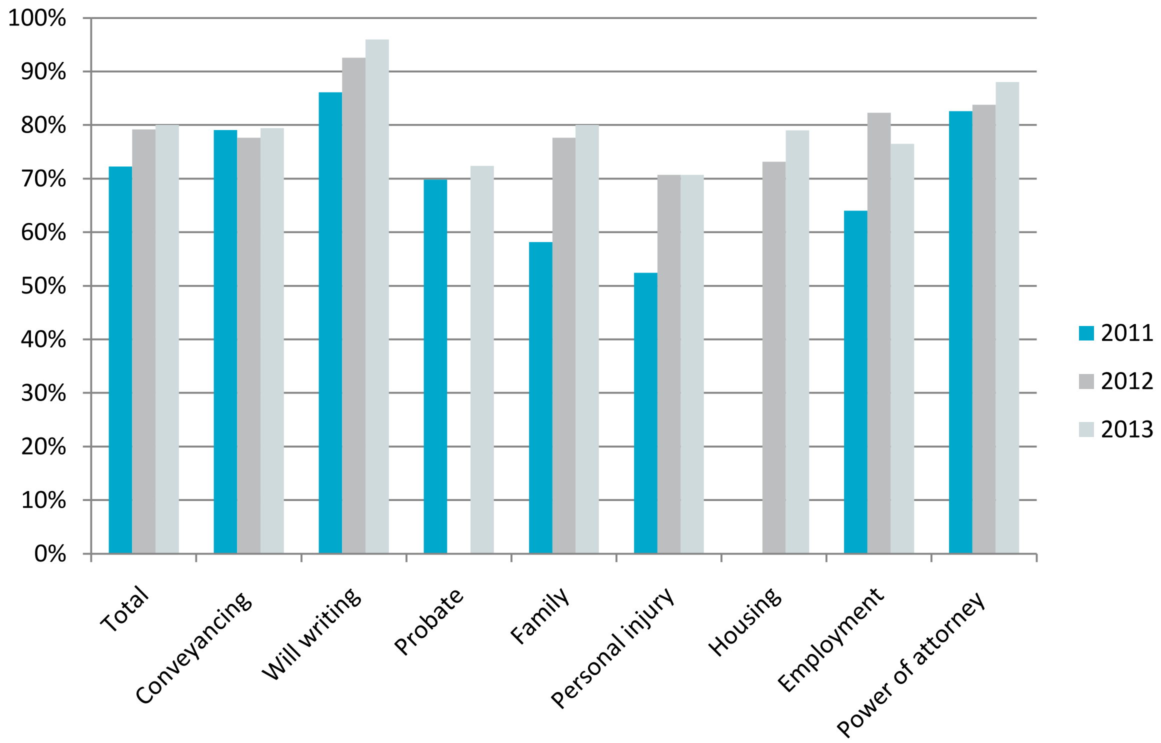


Chart 3 – Service satisfaction by area of law, 2011-13



Service features
The Tracker Survey asks participants to rate their satisfaction with different aspects of customer service and value for money. Satisfaction levels are broadly maintained with those found last year, although empathy has increased by 4%. Across the three years of the survey, satisfaction with the quality of advice has steadily increased. In many areas, service levels that dipped last year are showing signs of recovery.

Clear information on costs, timeliness and communication are the worst rated elements of service, broadly matching the Legal Ombudsman's caseload profile.

Satisfaction with value for money is much lower than with the service received (57%). Value for money involves an assessment of a range of factors including cost and service. Other research shows a consistent perception that legal services are expensive.

Consumers report that their experience differs depending on the type of legal work. For example, timeliness and ongoing communication are the weakest service elements in conveyancing, while clear information about costs is a particularly poor feature of family work. It is concerning that empathy is poorly rated for probate given the emotionally sensitive nature of this work.

Chart 4 – Satisfaction with service features, 2011-13

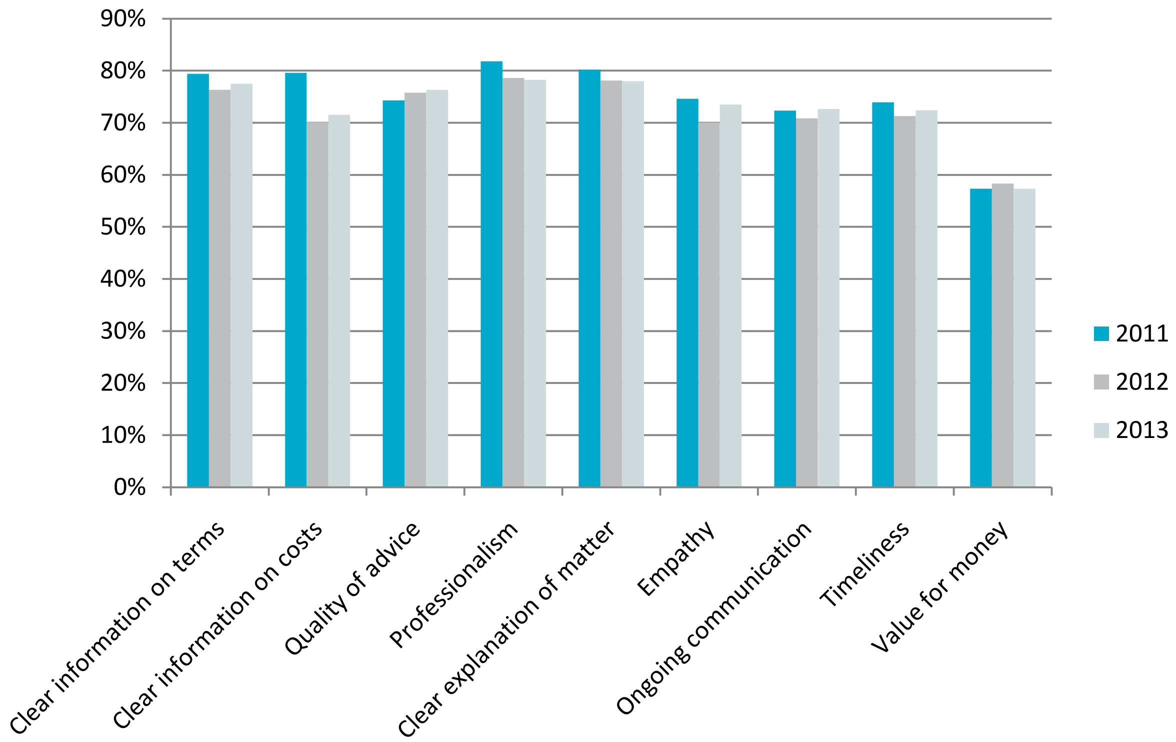
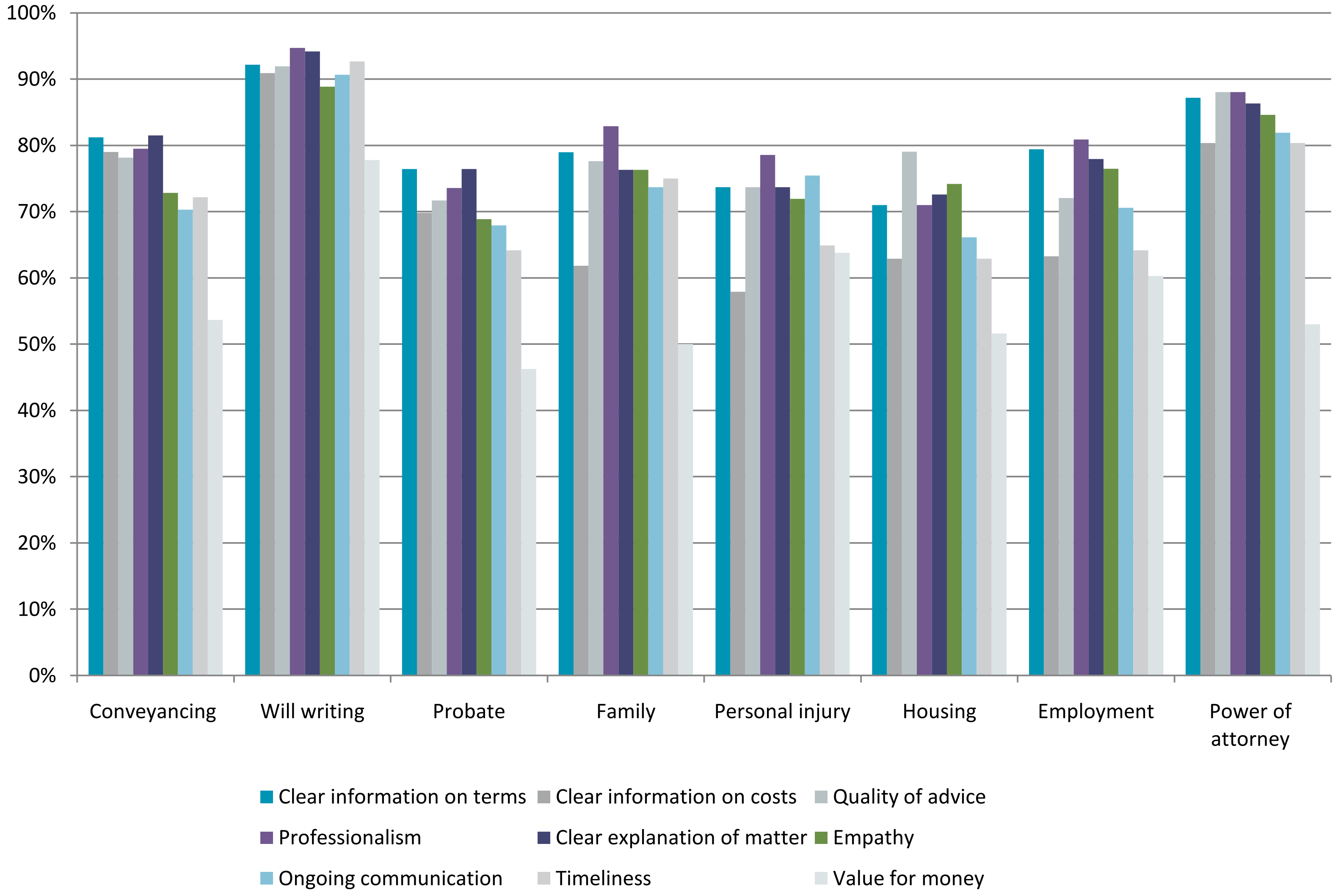
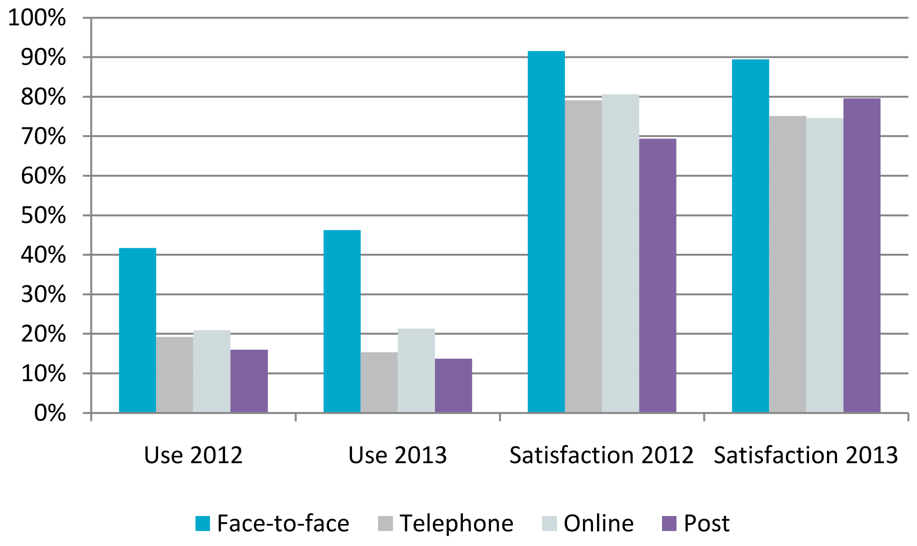


Chart 5 – Service features by area of law, 2013



Delivery channel
Satisfaction varies depending on the delivery channel. As expected, face-to-face advice is the rated highest by consumers. 8 in 10 consumers are satisfied by services delivered online suggesting there is scope for these services grow in future. Satisfaction with this delivery channel has increased since last year, suggesting improvements in service delivery or that consumers are growing more comfortable with this type of service.

Chart 6 – Delivery channel by usage and satisfaction, 2012-13



Value for money
Looking more closely at value for money, will-writing is most highly rated. This is not a surprise as providers often sell wills as a loss leader for dealing with the estate should they be named as an executor. In fact, probate is the lowest rated area of law alongside family – where fees are highest and can significantly vary from initial estimates. Figures on value for money for personal injury and employment should be treated with caution given these services are often provided at no cost to the consumer.

Quite small proportions of consumers consider they got very good value for money, which suggests that affordability is still a pressing concern for the sector. This is true across the population: overall satisfaction with value for money is 58% for ABC1s and 54% for C2DEs – this is closer than might be expected. The gap between White British and BME groups is similar (59% v 54%).

Funding source may have some influence on service satisfaction. These results should be treated carefully given the link between outcome and service satisfaction, while it is possible that free services will naturally be more highly rated. However, just 67% of consumers funded through insurers report being satisfied with the service they received – far lower than for all other funding sources.

Chart 7 – Value for money, 2013

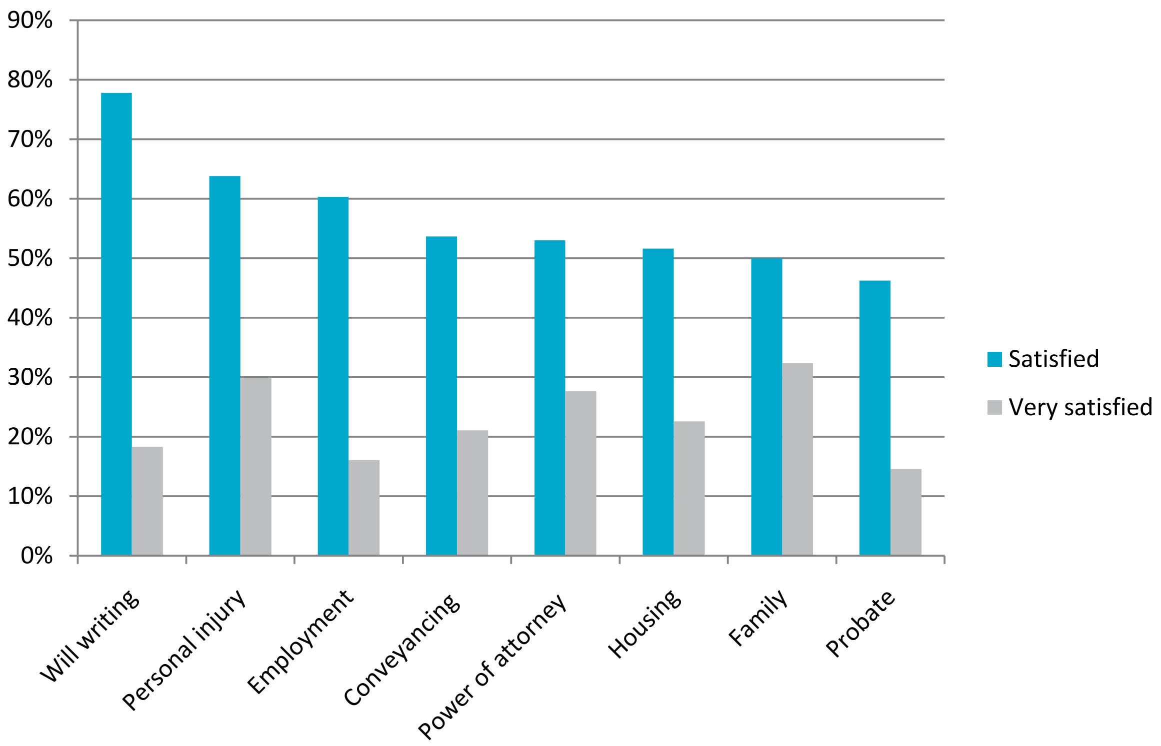


Chart 8 – Satisfaction by funding source, 2013