

# Tracker Survey 2018

## Briefing note: how consumers are using legal services.

### Key findings:

- 88% of legal services consumers are satisfied with the outcome of their matter and 84% are satisfied with the legal service.
- 64% of consumers feel that the overall service and advice is good value for money.
- 35% of dissatisfied consumers do nothing about it (silent sufferers).
- 20% of consumers do not know how to make a complaint and 27% are not certain.
- 73% of consumers pay for their legal service themselves or with the help of family and friends.
- Funding through legal aid has decreased from 5% in 2017 to 2% in 2018.
- 13% of consumers take the unbundling approach\*, particularly in probate (34%), and advice and appeals about benefits or tax credits (33%).

### Note on methodology:

*For the last eight years the Panel has commissioned YouGov to conduct an annual survey in two parts: a nationally representative sample (1,828 adults); and a sample of people who have used legal services in the last two years (3,535 adults). The two samples were weighted to be representative of each wider population. Differences in the results between sub-groups and over time have been tested to the 95% confidence level – we are 95% confident that these findings are not due to chance. Fieldwork took place during 07 March and 10 April 2018.*

\*Unbundling is when a package of legal services is separated into tasks between the consumer and legal service provider. The two parties agree which parts of the package the provider will deliver and which tasks the consumer will undertake.

## Service element

The vast majority of consumers (84%) say they are satisfied with the service they receive from their legal service provider. The level of satisfaction is at its highest compared with all previous waves of the Tracker Survey. Consumers most likely to say they are satisfied are:

- those who use will writing (95%) and power of attorney (90%)
- older consumers age 55+ (88%)
- those from a White British background (85%).

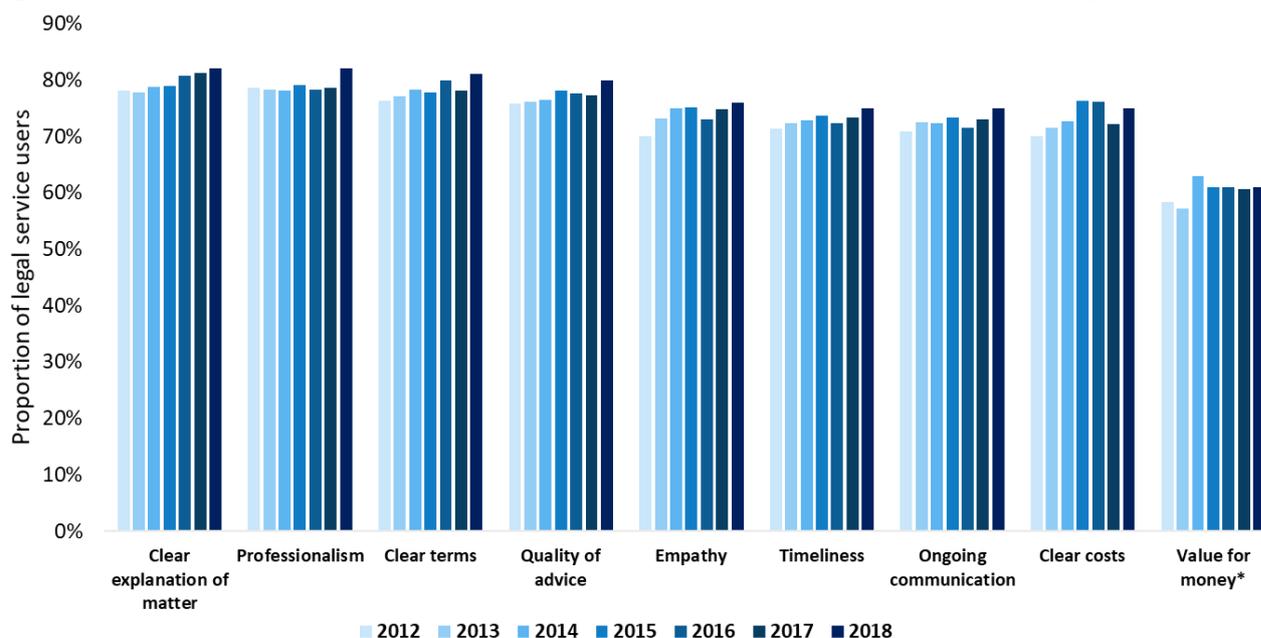
This is in line with the demographic profile of those who tend to use these specific services.

Satisfaction levels are high in all elements of service provision, particularly for professionalism (82%), clarity of terms (81%), and quality of advice (80%) (see *Figure 1*). Amongst those who shop around, satisfaction with the clarity of information on costs rose to 75% from 72% in 2017. Conveyancing and services provided for accident and injury claims have higher levels of dissatisfaction (13% and 14% respectively).

64% of consumers say that the overall service and advice is good value for money, this increased slightly from 61% in 2017. The services thought to be best value for money are will writing (76%), and advice and appeals about benefits or tax credits (73%). Contrastingly, only 52% of those using legal services for housing, landlord or tenant problems feel they are getting good value for money.

Consumers who pay for the service with their own funds are less likely to say that it is good value for money, compared to those who access the service for free (65% vs 76%). Consistent with levels of satisfaction, older consumers age 55+ (67%) are more likely to say the service is good value for money. There are no significant regional differences or differences across ethnic groups.

**Figure 1: Satisfaction with different elements of service delivery – time series analysis**



\*Value for money is measured on a scale of very good to very poor, and the figure shown represents overall good value

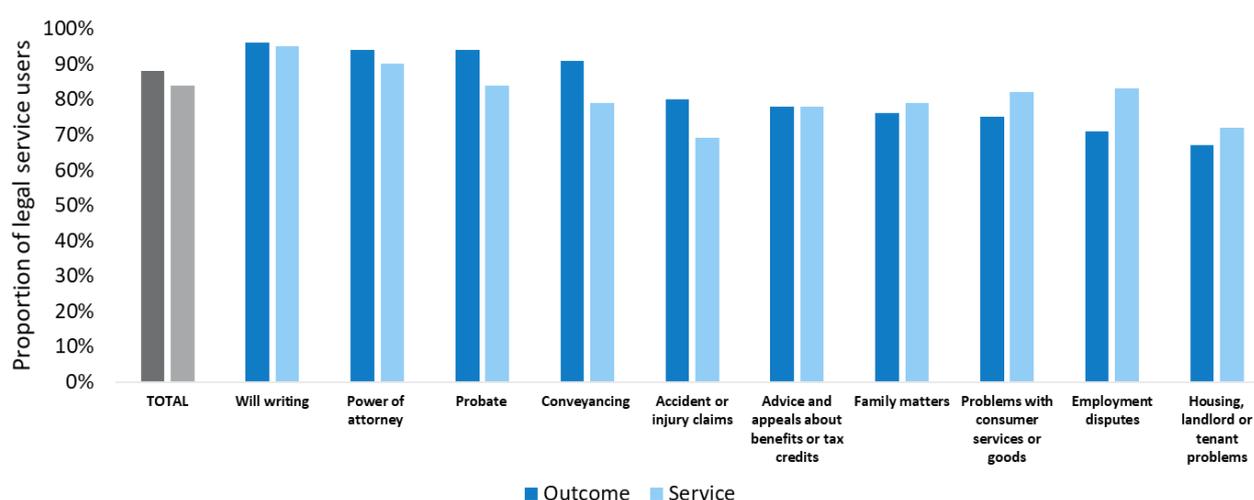
Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535)

## Outcome satisfaction

88% of consumers say they are satisfied with the outcome of their legal matter, slightly higher than the previous year (83%). The highest satisfaction rates are amongst consumers aged 55+ (91%), those from a White British background (89%) and those from the highest social grades (ABC1s<sup>1</sup> - 89%).

Satisfaction with the outcome is particularly strong among consumers who use a service for will writing (96%), power of attorney (94%) and probate (94%). Those who use services for employment disputes (71%) and housing, landlord and tenant problems tend to be the least satisfied (67%). Across all services, outcome satisfaction is higher than satisfaction with the service, except for employment disputes, problems with consumer services or goods, and family matters (see *Figure 2*).

**Figure 2: Satisfaction with service and outcome – by type of legal service accessed in 2018**



**Base: All legal service users, 2018=3535**

## Delivery of legal services

In the past six years, having legal services delivered through email or the internet/online has become increasingly common. This increased from 21% in 2012 to 30% in 2018. As service delivery over the internet becomes more prevalent, delivery by post becomes less common. Delivery by post has decreased by 8 percentage points from 16% in 2012 to 8% in 2018. The proportion of consumers who receive face-to-face service has remained stable over the past three years and is currently at 46% (see *Figure 3*).

Notably, different areas of law tend to use different methods of delivery. Face-to-face services are predominantly used in will writing (80%) and power of attorney (64%) while email or the internet are mostly accessed in conveyancing (52%) and problems with consumer services or goods (37%). Telephone services are highly accessed for accident and injury claims (42%).

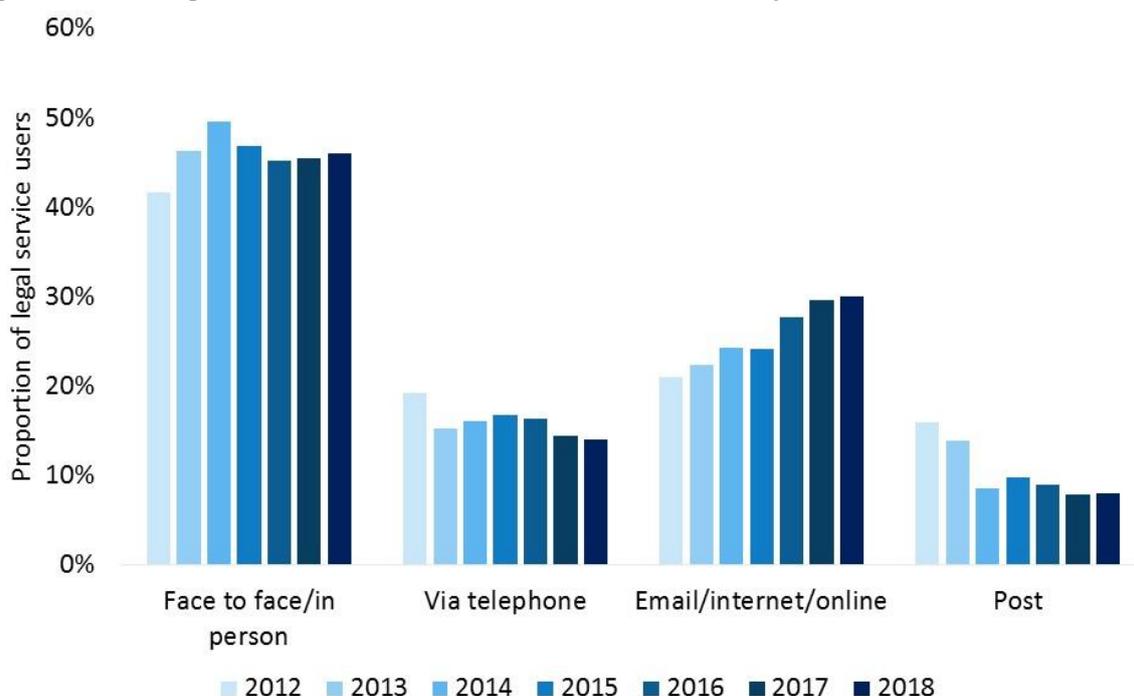
Consumers who reside in London are more likely than those living in other parts of England and Wales to use legal services over the internet (36% compared with 28% in other parts of

<sup>1</sup> ABC1 and C2DE are drawn from a system of demographic classification originally developed by the National Readership Survey to classify readers, but now used as a standard for market research. ABC1 is classified as the highest social grade and C2DE classified as the lowest social grade.

England, and 29% in Wales. Face-to-face services are mostly preferred by consumers living in the North of England (49%) and older consumers age 55+ (56%).

Consumers in higher social grades (ABC1) are more likely to use legal services over the internet (31%) than those from lower social grades (C2DE, 21%). However, those from lower social grades increased their preference for online service delivery by 9 percentage points since 2017. Additionally, those from BAME background (36%) are more likely than White British consumers (27%) to use online services.

**Figure 3: How legal services are delivered – time series analysis**



**Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535)**

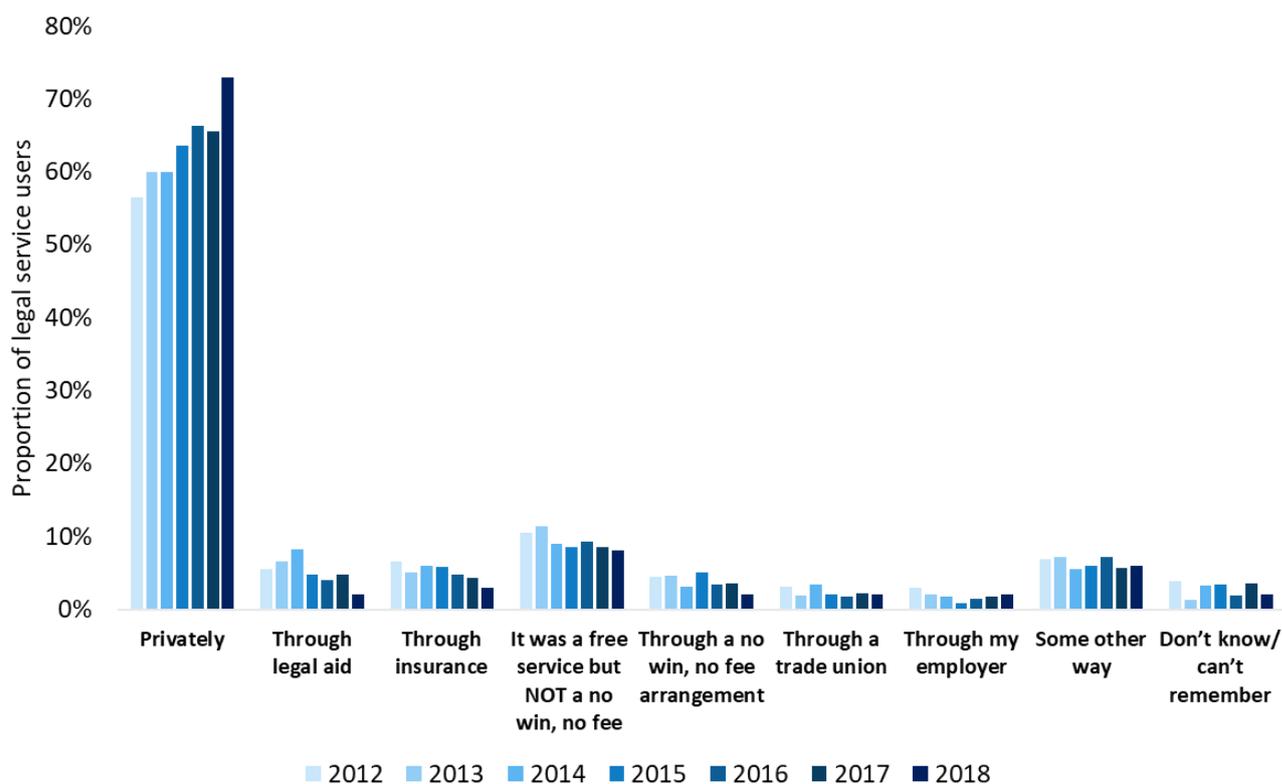
### Funding of legal services

Results from this year’s Tracker Survey show that consumers rely more on private funding than they did in previous years (see *Figure 4*). 73% report that they pay for their legal service themselves or with the help of family and friends. This is an increase of 17 percentage points since 2012 and higher than all previous waves of this research. Reliance on other types of funding has slightly fallen in most areas – for example, funding through legal aid has decreased from 5% in 2017 to 2% in 2018.

Consistent with previous years, funding arrangements vary considerably by different areas of law. Consumers who use conveyancing, power of attorney and will writing pay for the fees themselves (94%, 86% and 84% respectively). 35% of those using legal services for criminal charges and offences fund it through legal aid. When using legal services for employment disputes, 36% fund it through their employer.

Somewhat unsurprisingly, those from higher social grades (ABC1, 75%) are more likely to pay for the service themselves than those from lower social grades (C2DE, 65%). Older consumers age (55+) and those from a White British background are also likely to pay in this way, 78% and 75% respectively.

**Figure 4: Funding of legal services– time series analysis**



Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535)

### Complaints behaviour

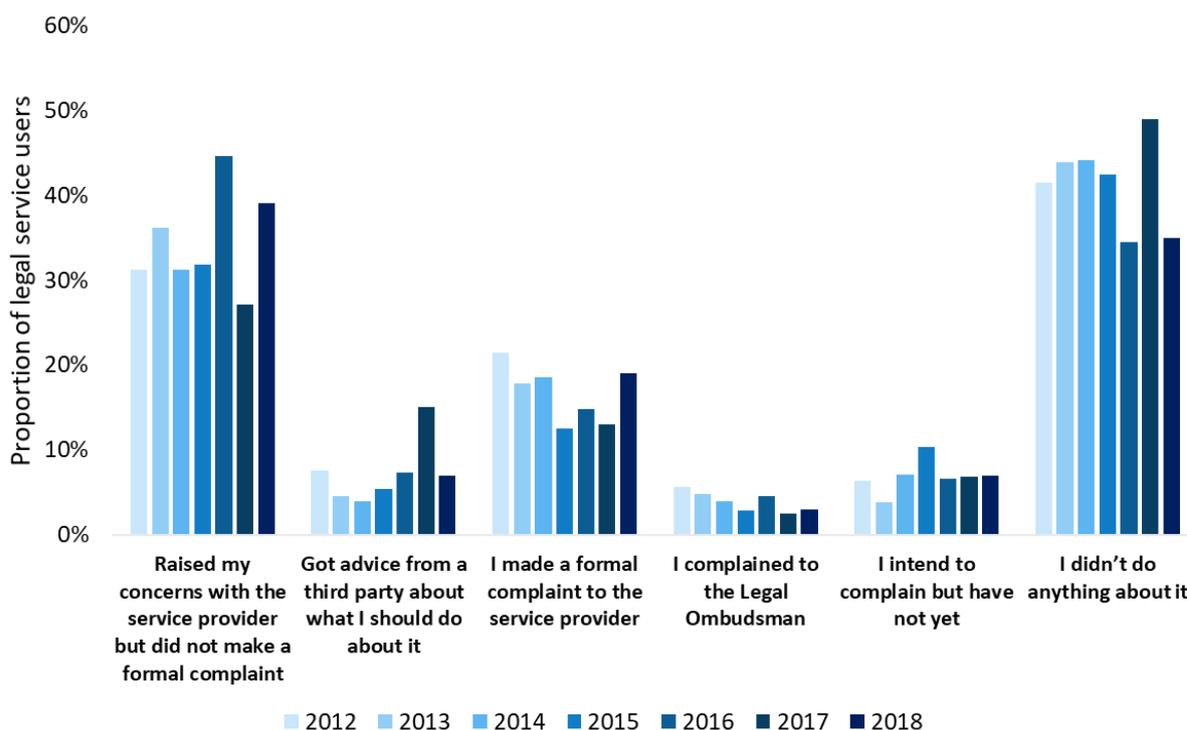
The proportion of ‘silent sufferers’, those consumers who are dissatisfied with the services but do nothing, has fallen to 35% from 49% in 2017 (see *Figure 5*). 20% of legal services users do not know how to make a complaint and 27% are not certain of how to make a complaint.

30% of the general public say they are not confident to make a complaint about a lawyer, similar to those who have used a legal service in the past two years (31%).

The general public’s confidence in complaining about a lawyer (45%) is lower than confidence in complaining about supermarkets (68%), banks (55%) and mobile phone companies (51%). People from a higher social grade are more confident in complaining about a lawyer (ABC1, 46%) than those from a lower social grade (C2DE, 39%), but the gap between these two groups has narrowed since 2017. Levels of confidence are slightly higher for those from a White British background (70%) compared to BAME groups (65%).

Knowledge of what lawyers do appears to be the key factor in having confidence to make a complaint. Those with greater knowledge of what lawyers do are much more confident in complaining (69%) than those with limited or no knowledge (22%). Additionally, awareness of the Legal Ombudsman has remained fairly stable with the majority of the public aware (64%), the same as in 2012.

**Figure 5: Legal service consumer’s response to being dissatisfied – time series analysis**



Base: All legal service users (2012=116, 2013=107, 2014=76, 2015=91, 2016=120, 2017=114, 2018=252)

## Unbundling

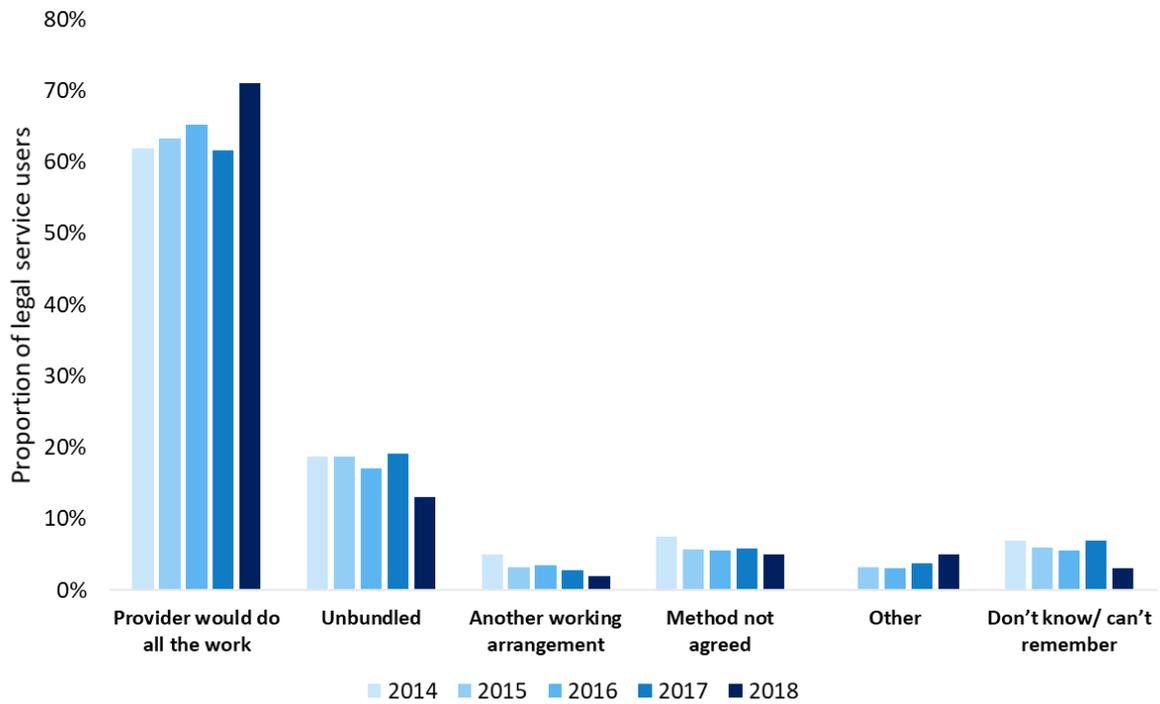
Unbundling is when a package of legal services is separated into tasks between the consumer and the provider. Each agree which parts of the package the provider will undertake. Offering this service to consumers can, in some cases, help them to manage costs and may alleviate some access to justice issues.

In 2014, we started to measure how consumers are being involved in the delivery of their legal service. Unbundling is now at its lowest level (13%) and has fallen from 19% last year. This year the proportion of consumers that agree to the legal service provider doing all of the work increased to 71% (see *Figure 6*).

Differences emerge when looking at working arrangements by the type of legal service used (see *Figure 7*). Those who engage with a legal service provider for conveyancing (88%), will writing (83%), accident and injury claims (77%) or power of attorney (68%) lean towards leaving all of the work to their provider. In contrast, those who use a legal service for probate and advice and appeals about benefits or tax credits are most likely to unbundle (34% and 33% respectively).

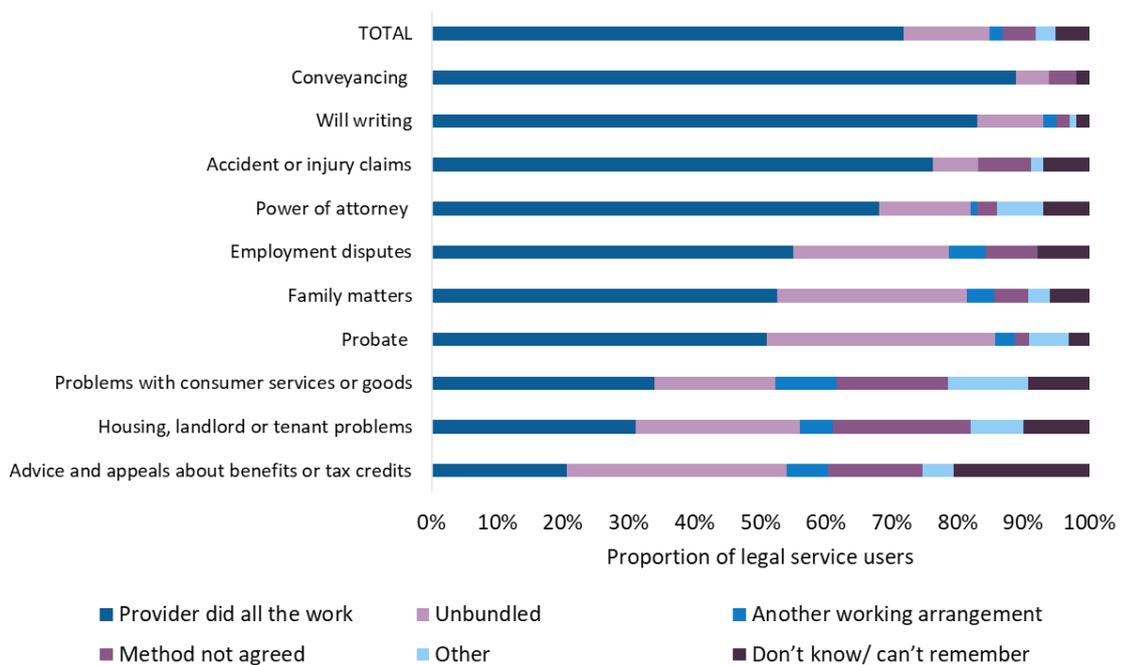
Of those who agree to unbundle, there are no significant differences by geographic region or social grade. However, White British consumers are much more likely to agree to the provider doing all the work (74%) compared with those of BAME background (57%).

**Figure 6: How it was agreed the service would be delivered before commissioning – time series analysis**



Base: All legal service users (2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535)

**Figure 7: Unbundling by type of legal service accessed**



Base: All legal service users (2018=3535)