

Tracker Survey 2017

Briefing note: how consumers are using legal services.

Key findings:

- Satisfaction with legal services (80%) and the outcome of the matter (83%) remains strong, especially among those who used a service for will writing or power of attorney.
- 61% of consumers feel that the overall service and advice is good value for money. This figure has remained stable in recent years.
- 66% of consumers paid for their legal service themselves or with the help of family and friends.
- 49% of dissatisfied consumers did nothing about it.
- 19% of consumers have taken the unbundling approach*, particularly in probate (47%), family matters (31%) and housing problems (26%).

Note on methodology:

For the last seven years the Panel has commissioned YouGov to conduct an annual survey in two parts: a nationally representative sample (1,822 adults); and a sample of people who have used legal services in the last two years (1,625 adults). The two samples were weighted to be representative of each wider population. All the figures 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 21 February and 27 March 2017.

**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.*

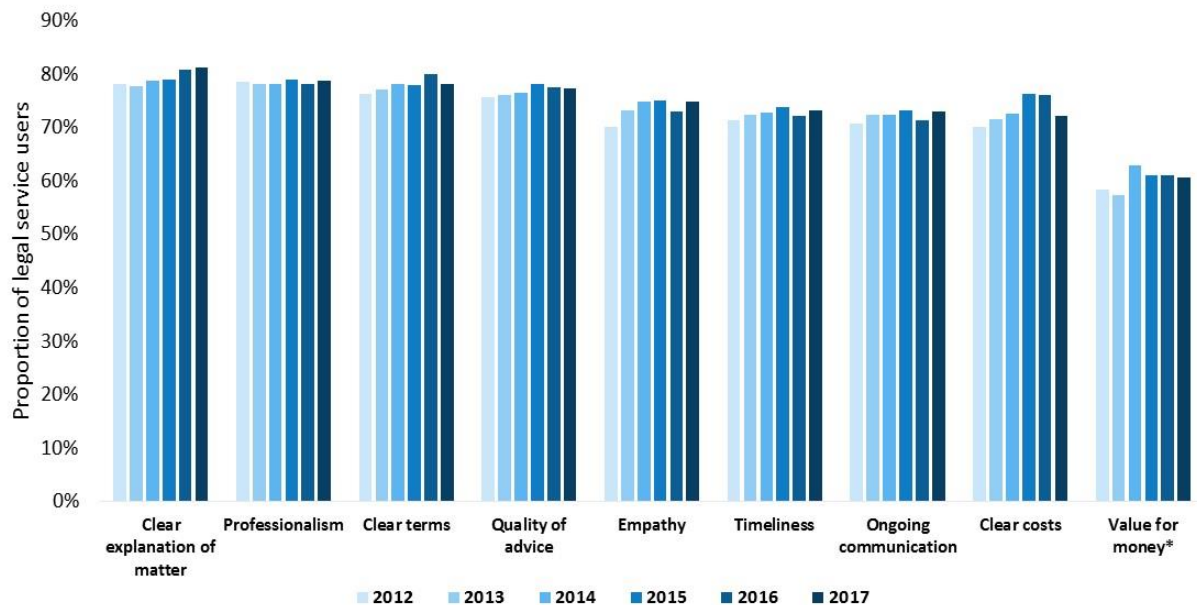
Service element

80% of consumers say they are satisfied with the service they received from their provider. This high level of satisfaction is consistent with previous years of the tracker survey. Those who use will-writing (95%) and power of attorney services (91%) report a high satisfaction rate, as do older adults aged 55+ (86%) and those from White British background (84%). This is in line with the demographic profile of those who tend to use these specific services.

Satisfaction levels are relatively high for all elements of service provision, including professionalism (79%), clarity of terms (78%) and quality of advice (77%) (see *Figure 1*). Nevertheless, in comparison with last year, satisfaction with the clarity of information on costs has decreased to 72% from 76% in 2016.

61% of consumers perceive that the overall service and advice is good value for money. This figure has remained stable in recent years. Notably, many of those who use services for will-writing perceive that the advice and service are good value for money (78%). Consistent with levels of satisfaction, those from a White British background (64%) and older adults aged 55+ (67%) perceive it is good value for money.

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

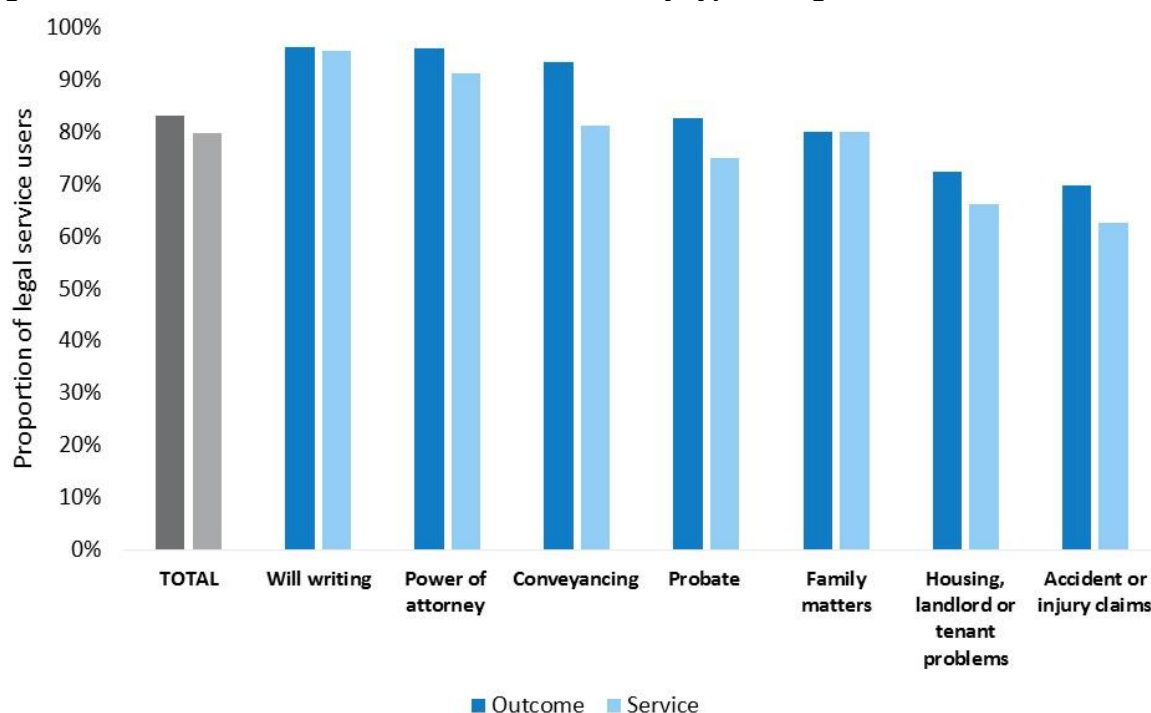
Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625)

Outcome satisfaction

Consistent with previous years, the vast majority (83%) of consumers report that they are satisfied with the outcome. Satisfaction is particularly strong among consumers who used a service for will-writing (96%) or power of attorney (96%), with nearly all reporting a satisfactory outcome. There is a high level of satisfaction amongst those who use services for conveyancing (93%). Users of services for accident or injury claims (70%) and housing problems (72%) are less likely to have been satisfied with the outcome of their legal matter (see *Figure 2*).

There are high satisfaction rates amongst consumers aged 55+ (89%) and those from a White British background (87%). Across all services outcome satisfaction is higher than satisfaction with the service, except for will-writing and family matters.

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



Base: All legal service users, 2017=1625

Delivery of legal services

In the past five years, there has been a steady increase in the proportion of consumers who have had their legal service delivered through email or the internet (see *Figure 3*).

Digital delivery is at 27% in 2017 compared with 20% in 2012. We note that as service delivery over the internet becomes more prevalent, delivery by post becomes less common: 8% of consumers had their service delivered through post in 2017 compared with 16% in 2012. The proportion of consumers who receive face-to-face service remains the same as 2016 (45%).

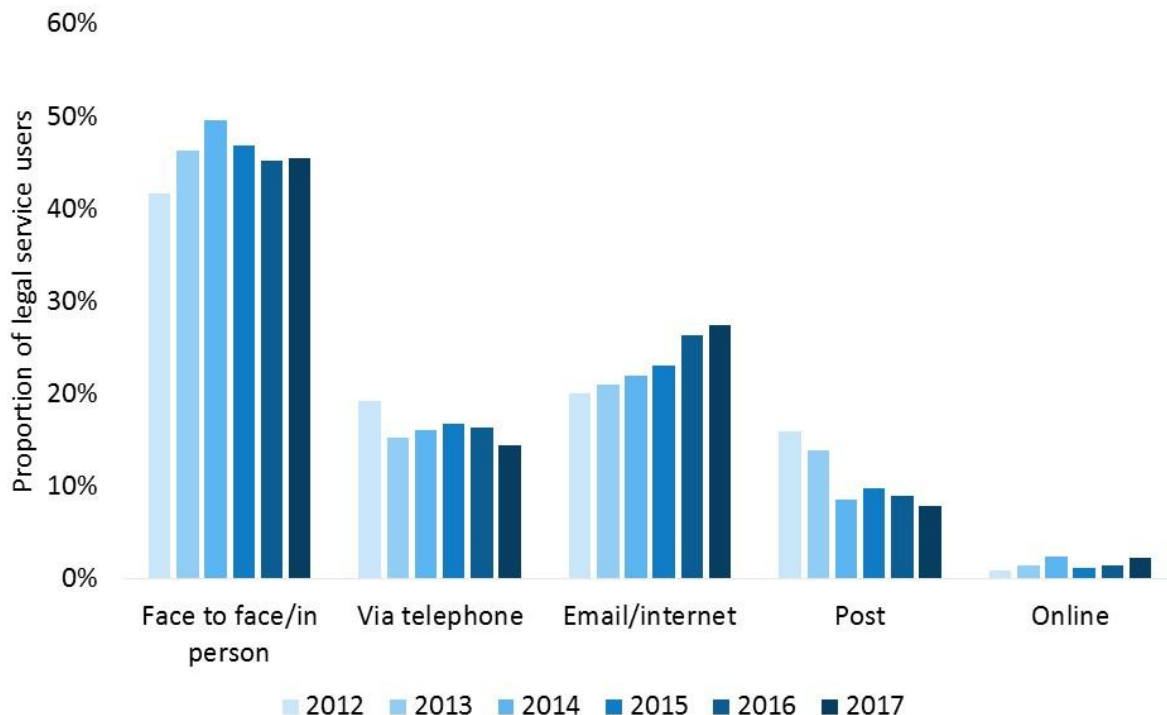
Notably, different areas of law tend to use different methods of delivery. Face-to-face services are predominantly used in will-writing (78%) and power of attorney services (68%), while email or the internet are mostly accessed in conveyancing (51%) and accident or injury services (48%). Telephone services are highly accessed for housing, landlord or tenant problems (40%).

Consumers who reside in London are more likely than those living in other parts of England and Wales to use legal services by email or over the internet (37% compared with 28% in the rest of the South, 25% in the Midlands and 23% in Wales and in the North).

Consumers in higher social grades are also more likely to use legal services by email or over the internet (ABC1¹, 32%) compared to those from lower social grades (C2DE, 12%), and those of BME background (32%) compared to White British (25%).

¹ 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.

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)

Funding of legal services

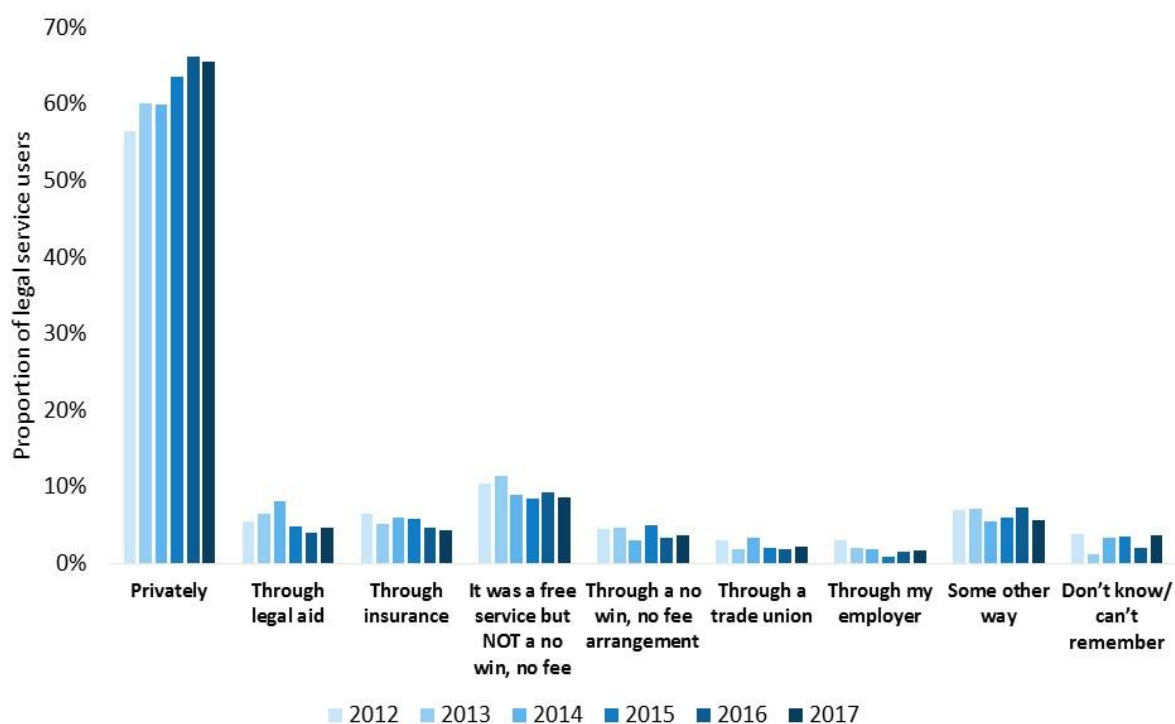
Results from this year’s tracker survey indicate that consumers rely more heavily on private funding than they did in the past (see *Figure 4*). Consistent with 2016, two thirds (66%) report that they paid for their legal service themselves or with the help of family and friends. This has risen by 10 percentage points since 2012, when the figure was 56%.

As seen in past years, funding arrangements vary considerably by different areas of the law. Consumers who use conveyancing, will-writing and power of attorney services tend to have paid for the fees themselves (94%, 83% and 82% respectively). Consumers who access legal services for housing problems or family matters may receive legal aid (26% and 17% respectively). Consumers who use services relating to an accident or injury claim may pay for them through insurance (45%) or a no-win no-fee arrangement (39%).

When examining demographic differences, findings reveal that consumers in London (11%) are more likely to have funded their services through legal aid than those in North East (8%) or South East England (3%), or Wales (2%).

Similarly, those from lower social grades (C2DE, 8%) rely slightly more on legal aid compared to higher social grades (ABC1, 4%). Additionally, 11% of BME groups pay through legal aid compared to 2% of those from a White British background. A majority of White British consumers (77%) pay for the services privately.

Figure 4: How legal services are funded – time series analysis



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

Complaints behaviour

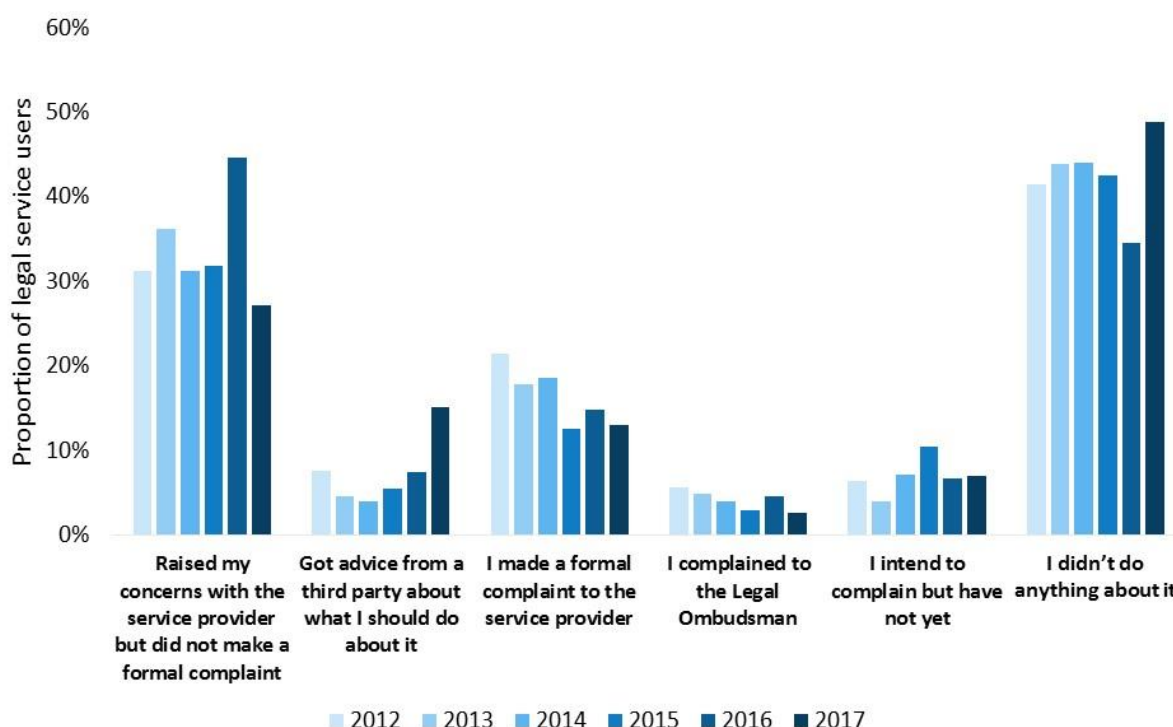
The proportion of ‘silent sufferers’, those consumers who were dissatisfied with the services they received but did nothing, increased to 49% from 35% in 2016 (see *Figure 5*). In addition, 44% of the general public say they would be confident to make a complaint about a service received from a lawyer. This is lower than the levels of confidence reported in 2012 when half (49%) of the public felt confident to make a complaint.

Confidence in complaining about a lawyer (44%) is lower than confidence in complaining about supermarkets (70%), banks (55%) and mobile phone companies (51%). People from a higher social grade are more confident in complaining about a lawyer (ABC1, 48%) than those from a lower social grade (C2DE, 35%). There is no major difference in levels of confidence between those from a White British background (46%) and BME groups (42%).

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 more confident in complaining (61%) than those with limited or no knowledge (25%).

The majority of the public (65%) are aware of the Legal Ombudsman and there has been no significant shift in the levels of awareness since 2015.

Figure 5: Legal service consumers' response to being dissatisfied – time series analysis



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

Unbundling

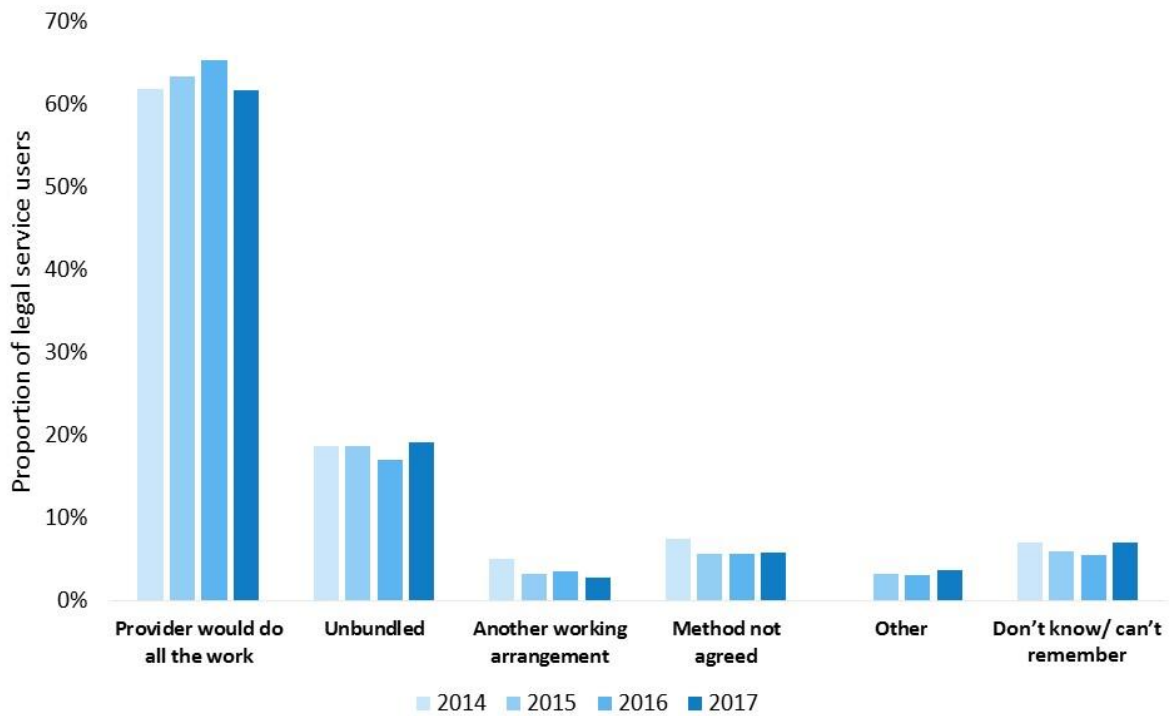
Unbundling is when a package of legal services is separated into tasks between the consumer and legal service provider. The two parties agree which parts of the package the provider will deliver and which tasks the consumer will undertake. Offering this service to consumers, can, in some cases, help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

In 2014, we started to measure how consumers were being involved in the delivery of their legal service, whether they relied on the professionals or felt they could take on part of the work themselves. We have not seen any growth in the use of unbundling since 2014. In 2017, 19% agreed to unbundle in advance of commissioning the work (see *Figure 6*). However, the majority (62%) agreed to the legal service provider doing all of the work.

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 (84%), will-writing (81%), accident and injury claims (77%) or power of attorney (70%) lean towards leaving all of the work to their provider. And those who use a legal service for probate, family matters or housing problems tend to unbundle (47%, 31% and 26% respectively).

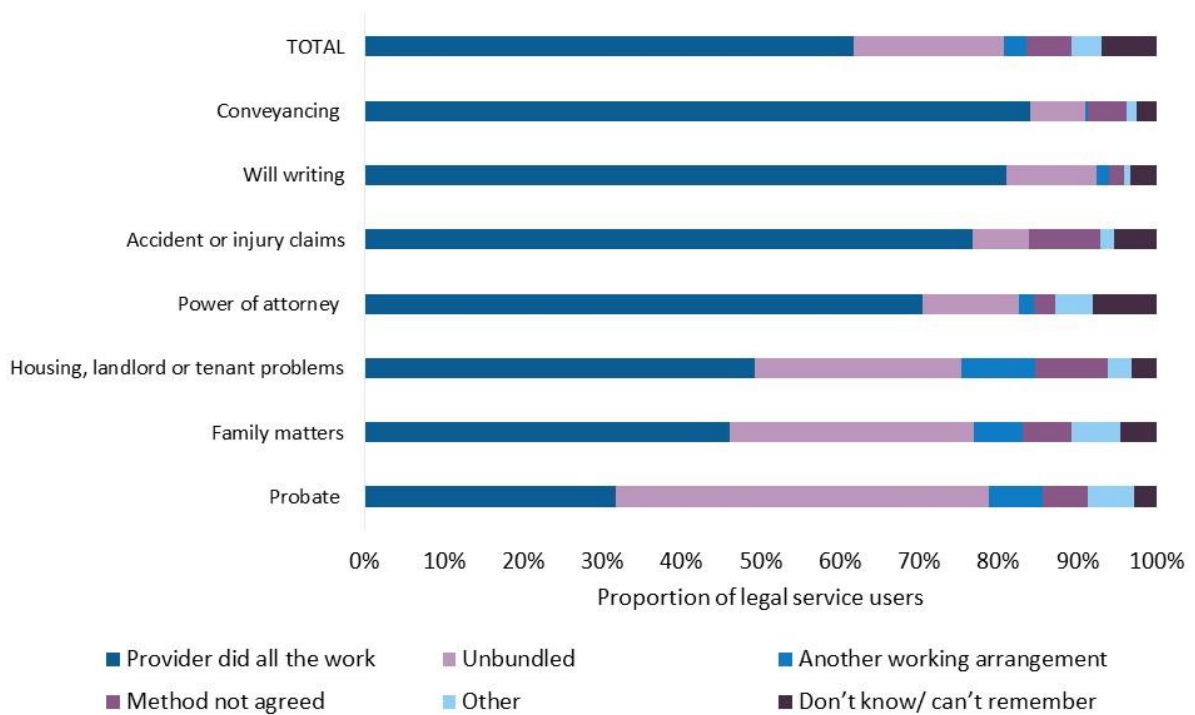
Of those who agreed to unbundle, there are no significant differences by geographic region or social grade. However, White British consumers are more likely to have agreed to the provider doing all the work (66%) compared with those of BME background (53%).

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)

Figure 7: Unbundling by type of legal service accessed



Base: All legal service users (2017=1625)