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Decade of data confirms increasing shift to online service delivery

The tenth Tracker Survey highlights the continuing rise of consumer interest in online legal services. The use of online services has more than doubled from 21% in 2012 to 44% in 2021, against a backdrop of growing consumer satisfaction with legal services and their outcome over the last ten years. As expected, the COVID-19 pandemic accelerated this shift to online delivery, with 54% of consumers using online services during the pandemic.

These results underscore a real opportunity to increase access for both younger and minority ethnic consumers, who are more likely to use online services. Regulators should not shy away from encouraging providers to develop online solutions, supported where appropriate by innovative use of LawTech, in parallel with maintaining face-to-face services.

When it comes to choosing a provider, it is disappointing that, ten years on from the first Tracker Survey, consumers are still relying on “gut feeling” and subjective recommendations as proxies for quality. They deserve more than this: regulators need to step up their work in developing objective quality indicators in order to empower consumers to make an informed choice of provider.

Key findings:

- 30% of consumers shopped around for a service provider in 2021 compared to 22% in 2012;
- Over the past ten years, there has been a modest increase (from 66% to 74%) in the amount of choice people feel they had when choosing their provider, but this figure has remained unchanged for the past four years, suggesting progress has stalled;
- There has also been an increase in consumer satisfaction with the service received (from 79% in 2012 to 83% in 2021) and the outcome (from 84% to 89% respectively) and more consumers are very satisfied overall;
- Legal services are more likely to be self-funded, up from 56% to 69% over this period;
- Fixed fee arrangements are also much more common, up from 38% to 52%;
- Reputation remains the most important factor in choosing a provider, and its importance has increased from 73% in 2012 to 80% in 2021;
- It is more important now for consumers that providers offer an online service that can be tracked, up from 27% in 2012 to 35% in 2021. This change appears to be associated with the pandemic because the figure was relatively stable before 2021.

Sarah Chambers, Chair of the Legal Services Consumer Panel, welcomed the tenth Tracker Survey, saying:

“The Consumer Panel is happy to see that legal services providers were able to react to the pandemic by substantially increasing their offer of online services. Going forward, we encourage regulators to support providers in continuing to be creative in how they deliver their services, taking the needs of all their customers into account.”

While shopping around has increased over the last ten years, past experience or personal recommendations have remained the most popular ways to choose service providers, highlighting the importance of providing every client with a high quality service. Providers and regulators must now work harder to develop objective indicators of quality to empower clients with the information they need.

ENDS

For more information contact Lola Bello, Consumer Panel Manager, on 020 72710077.

Notes to editors

1. The Legal Services Consumer Panel was established under the Legal Services Act 2007 to provide independent advice to the Legal Services Board about the interests of consumers of legal services in England and Wales. We investigate issues that affect consumers and use this information to influence decisions about the regulation of legal services.
2. For the last ten years the Panel has commissioned YouGov to conduct an annual survey in two parts on a sample of people who have used legal services in the last two years. All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 3,500 adults who have used a legal service in the past 2 years. Fieldwork took place between 11 February and 11 March 2021. The survey was carried out online. The figures have been weighted and are representative of legal service users by type of service used.
3. The full data set and the reports can be found on our website.