

Legal Services Consumer Panel Tracker Survey 2021



How consumers are choosing legal
services

June 2021



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Key findings: 2021

- 30% of consumers say they shop around before choosing their legal services provider; this has increased from 22% in 2012.
- 74% of consumers feel they have a wide range of choice when choosing a provider, continuing an upward trend since 2016 (68%).
- Reputation (80%) continues to be top of mind when choosing a legal service provider, followed by price (71%) and providers being specialists in their area (70%).
- Consumers most commonly find the price of their service after talking to their provider (61%) rather than through other means. This has remained broadly comparable over time, with the same proportion reporting this in 2017.
- 77% of consumers find it easy to understand the information they were provided on the price of the legal service.
- When shopping around for a provider, 44% of consumers could recall seeing information on staff, services or timings for delivery, an increase from 2020 (35%).

Key findings: 10 years on

Compared with how legal services were chosen by consumers in 2012, we can identify the following trends:

- Since 2012, there has been an increase in the amount of choice people feel they had when choosing their provider (up from 66% to 74% in 2021).
- The proportion of consumers who shop around and compare different providers has increased from 22% in 2012 to 30% in 2021.
- By contrast, there has been no change in the proportion of consumers who say it is easy to make comparisons between providers (58% in 2021 and 57% in 2012).
- Reputation remains the most important factor in choosing a provider, and its importance has increased from 73% in 2012 to 80% in 2021.
- Offering an online service has also increased in importance over the past 10 years, up from 27% in 2012 to 35% in 2021. Interestingly, this has been relatively stable over the past 9 years, suggesting the change is a result of the COVID-19 pandemic.
- Perceptions of levels of choice in the market remained unchanged for the past four years, with 74% of consumers reporting a fair or great deal of choice. This has increased from 66% in 2012, suggesting that while consumers perceive there is greater choice now, those perceptions of choice in the market have stalled.
- The ways consumers chose their legal service provider has remained broadly unchanged over the past 10 years:
 - I/my family member had used the provider before (21% in 2012; 22% in 2021)
 - Referral by another organisation (15% in 2012; 15% in 2021)
 - Recommendation from family/friends (12% in 2021; 11% in 2021).

Note on the methodology

For the last ten years the Panel has commissioned YouGov to conduct an annual survey of people who have used legal services in the last two years. This year we surveyed 3,500 legal service users.

The findings throughout the report are presented in the form of percentages, and all differences highlighted between subgroups are statistically significant at an alpha level of 0.05 unless otherwise indicated. In some instances, apparent differences between figures may not be considered 'statistically significant' due to sample sizes. Non-significant findings do not necessarily mean that no change has occurred (e.g. year on year), rather a failure to detect differences due to *sampling variations*. Fieldwork took place between 11 February and 11 March 2021.

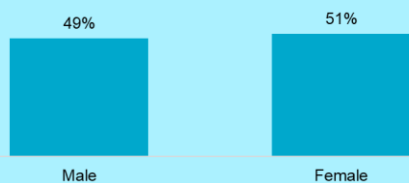
The research asks people to reflect on a legal service they have used in the past two years and 40% of the sample said that the service they used was delivered since the start of the coronavirus (COVID-19) pandemic, e.g. March 2020. Throughout the report, comparisons are made between this group, and those who used a legal service in the last two years but before the pandemic.

In 2016, the Competition and Markets Authority (CMA) published its final report for its market study looking at legal services. The study concluded that consumers' ability to choose the best option for legal support was hindered by insufficient available information on price, quality and service. To help understand how the legal services market may have changed since that time, where relevant, we have chosen here to highlight differences between how people are choosing legal services in 2021 compared with 2016.

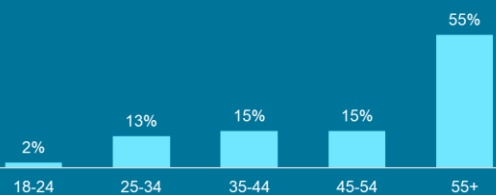
This year, YouGov also conducted a consumer segmentation exercise, based on how people shop around and choose their legal service provider. The findings can be found on page 16 onwards.

Sample profile

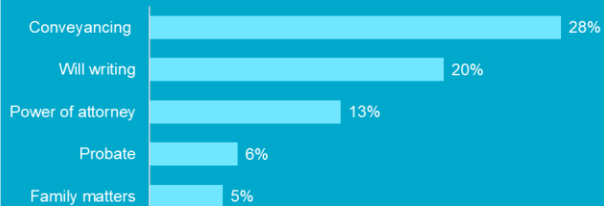
The breakdown of legal service users by gender is shown below



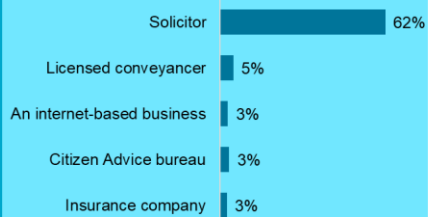
As is the breakdown by age



The top 5 service types accessed are:



And the top 5 providers used are:



How consumers are choosing legal services

An increasing number of consumers are shopping around



2012: 22%
shopped around

2021: 30%
shopped around

Consumers are most likely to shop around when using legal services for:

- Immigration matters **49%**
- Conveyancing **38%**



Younger conveyancing consumers are more likely to shop around

The top 5 factors of choice are:

1. Reputation **80%**
2. Price **71%**
3. Specialisms **70%**
4. Speed of delivery **68%**
5. Local offices / convenience **61%**

Most felt they had choice

74%
felt they had a
wide range of
choice of
providers



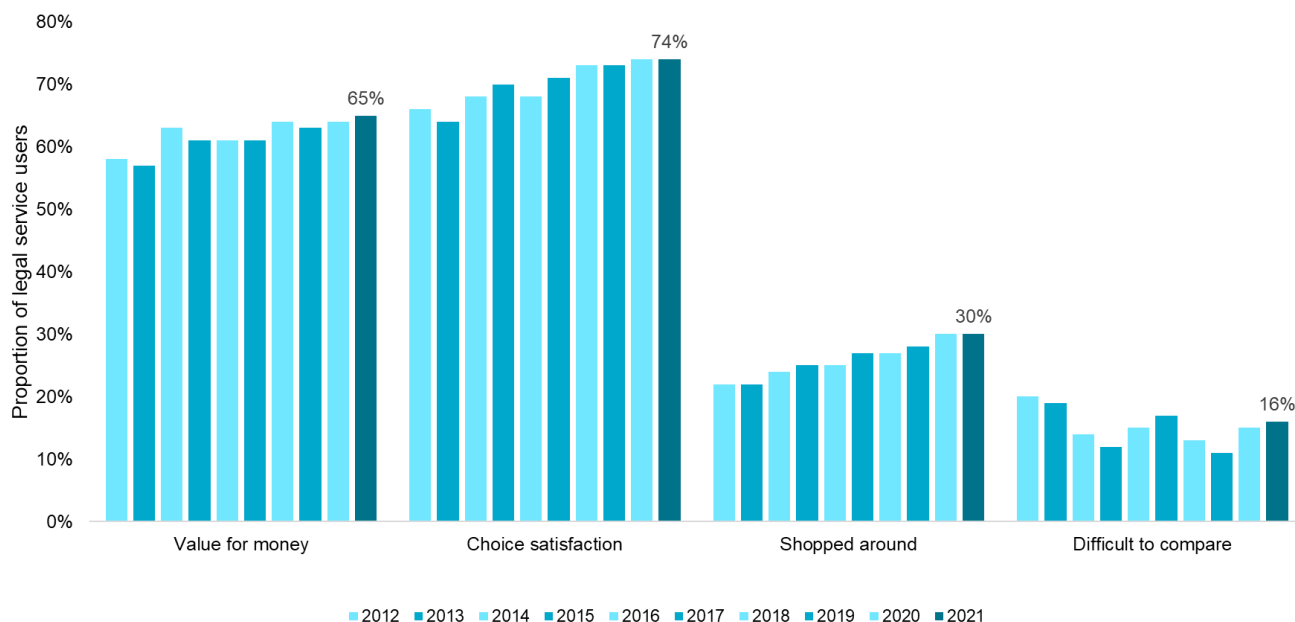
And that the information on price was easy to understand



77%
said this

Consumer behaviour

Figure 1. How consumers experience the legal services market



Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535, 2019=3589, 2020=3623, 2021=3500)

Who shops around?

The proportion of consumers who shop around and compare services or prices before choosing a legal services provider has increased since 2012, from 22% to 30% at present.

In 2016, 25% of legal services consumers said they shopped around for the provider they used, lower than the 30% who shopped around in 2021. Those who used legal services during the COVID-19 pandemic are more likely to say that they shopped around than those who used legal services in the last two years, but before the pandemic (35% vs. 27%).

The type of services used remains the strongest distinguishing feature as to whether consumers shop around. Those who used a service for immigration matters (49%) or a conveyancing service (38%) were most likely to shop around (*see infographic above*). Consumers using services for probate (19%) or accident or injury claims (16%) were much less likely to shop around, showing the disparity between service types.

As observed in 2020, while younger consumers remain more likely than older consumers to say that they shop around (with 41% of 18-34 year olds doing so in comparison to 26% of those aged 55+), this can be mainly explained by the different types of services older consumers are more likely to use (e.g. will writing, probate). However, within a service such as conveyancing, we do find that younger consumers are more likely to shop around than older consumers:

- 51% of 25-34 years olds and 42% of 35-44 year olds shopped around for a conveyancing provider compared with 34% of those aged 55+.

When shopping around, most commonly, consumers compare three (41%) or four (19%) providers. When choosing a provider, many do not take long to do this, with 62% of consumers saying this took less than a week.

How much choice do people think they have?

Perceptions of levels of choice in the market remain unchanged for the past four years, with 74% of consumers reporting a fair or great deal of choice. This has increased from 68% in 2016, suggesting that while consumers perceive there is greater choice now, those perceptions of choice in the market have stalled.

Older consumers, though less likely to shop around, remain more likely than their younger counterparts to say they had a fair or great deal of choice (79% of 55+ vs. 66% of 18-34).

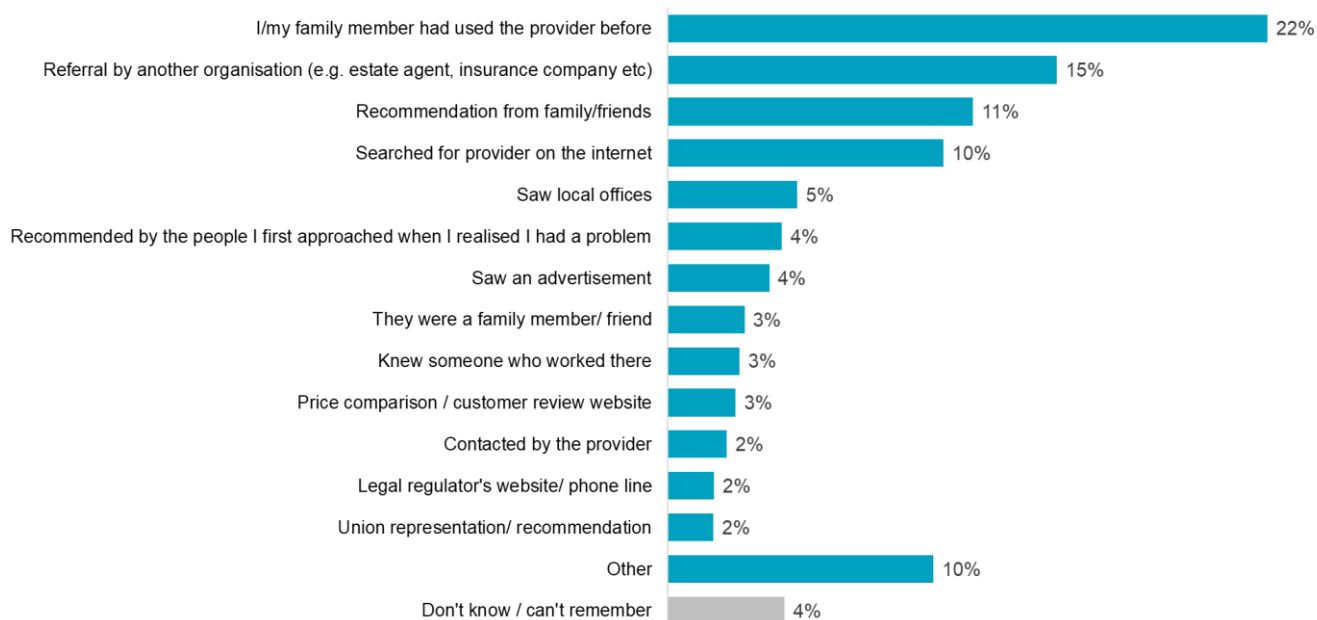
By service type the complexity of the service delivered relates to perceptions of choice. Perceived choice was higher among those using more commoditised legal services, such as will writing (88%) and conveyancing (82%), and lower among more complex matters such as advice and appeals about benefits or tax credits (58%) and accident or injury claims (44%).

Perceptions of choice are comparable among those who have used a legal service during the COVID-19 pandemic, and those who used a legal service in the last two years but before the pandemic (76% vs. 73%).

How do people choose their provider?

Recommendation and prior knowledge have a key role to play in choosing legal service providers. When thinking about the main way consumers chose their provider, 22% said that either themselves or a family member had used the legal service provider selected before. It is also common for consumers to be referred by another organisation (15%), say that the service was recommended by family or friends (11%) or to have searched for providers on the Internet (10%) (see *Figure 2*).

Figure 2. How consumers choose their provider



Base: All legal service users (2021=3500)

The ways in which consumers chose their legal service provider has remained broadly consistent compared to 2012:

- I/my family member had used the provider before (21% in 2012; 22% in 2021)
- Referral by another organisation (15% in 2012; 15% in 2021)
- Recommendation from family/friends (12% in 2021; 11% in 2021).

The proportion stating that they used a digital comparison tool¹ has also remained broadly comparable over time. In 2016, 1% of consumers said that this was the main way they chose their provider, compared to 3% in 2021. Whilst this is a statistically significant increase, the proportion choosing a provider through this means remains low.

For 5% of consumers, a digital comparison tool played a role in choosing their provider (e.g. when thinking about all the ways they chose, not just the main one). Younger consumers are much more likely to have used a digital comparison tool than their older counterparts:

18-24 years olds (10%)	25-34 years olds (11%)	35-44 years olds (7%)	45-54 years olds (7%)	55+ years olds (3%)
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There are also differences in usage by ethnicity. Asian consumers are more likely to say that they used a digital comparison tool in comparison to White British consumers (15% vs. 4%).

Those who used legal services during the COVID-19 pandemic are slightly more likely to say that they used a digital comparison tool than those who used legal services in the last two years, but before the pandemic (7% vs. 4%).

Are consumers confident in the choice they made?

Almost all consumers (91%) say that when they made their choice of provider, they were either very or somewhat confident that they would deliver a good service. Only a small proportion (6%) reported being either not very or not at all confident.

Confidence is high among each of the types of legal services, though consumers using a service for accident or injury claims (15%) were more likely than other users to say that they were not confident.

¹ The question wording used in the survey was 'price comparison / customer review website'

Confidence in quality

We undertook in-depth interviews with legal service consumers for this research on how consumers choose legal services (see more details at page 16). We have identified that confidence in the quality of the legal service can be harder to judge if the consumer has not had any previous relevant legal experience to use as a benchmark.

Confidence in quality often comes from a “gut feeling”, past experience with the provider, reviews and personal recommendations from both personal connections and professionals.

Consumers also tend to use broad indicators of quality (used across sectors and services) to make a judgement such as responsiveness, how empathetic and professional the legal expert appears to be, especially in the initial communications, the price being reasonable and not being too low, the look and feel of the organisation’s website and the companies' / individuals' experience in the area of their legal need.

The quotes below come from the qualitative interviews we undertook with consumers in each of the segments:

“It is feedback and word of mouth – some have quotes on their website from customers... You do hear from others in the local area if it is a bigger company and what their reputation is like... You look to see if their website has lots of jargon or not, how professional were they when you visited them” (Considered consumers)

“Quality – you can only get an idea from reviews... Delivering what they said, getting back to me on time, being polite and professional... is important. I felt confident then that it would be good quality.” (Considered consumers)

“I was very confident about the quality as I used my financial adviser whom I trust.” (Confident consumers)

“I was quite confident, but people only put good reviews on their website.” (Confident consumers)

“[How you assess quality?] Reviews. The acid test is the initial conversation, how quickly they respond to the inquiry... Important they have the ability to be empathetic... I was pretty confident that the quality would be good but lots of people wouldn’t be – there is a lot of wording you need to Google.” (Choice confident but service suspicious)

“Absolutely [had confidence] as I had a really good service from them before. [How you assess quality?] A reasonable price, and someone that keeps in contact with you regularly, I want someone telling me what’s going on – communication is the most important thing.”
(Swift shoppers)

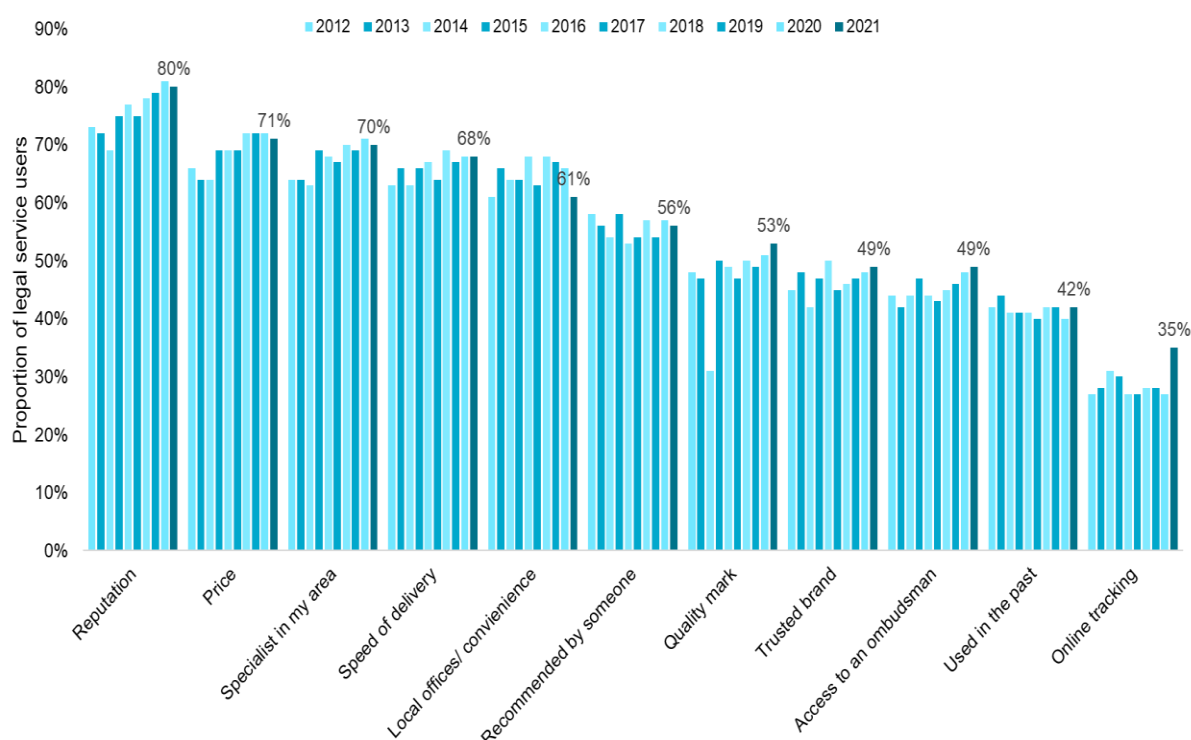
Do service providers deliver value for money?

Perceptions of value for money remain relatively high but static (65% in 2021, 64% in 2020). Most consumers are saying that the overall service and advice provided was good value for money, compared to just 9% saying it was poor value for money.

Satisfaction with value for money remains highest among those dealing with more commoditised matters, such as a will writing service (77%), and lowest for people dealing with more complex issues such as family matters or accident or injury claims (both 56%).

Drivers of consumers’ decision making

Figure 3. Consumers choice factors



Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535, 2019=3589, 2020=3623, 2021=3500)

For both providers and regulators, understanding what drives consumer decision making is key to assessing whether the market is responding to consumers’ needs or empowering consumers with pertinent and accessible information to make informed decisions.

When choosing a provider, reputation remains the most important factor (80%), with its importance increasing over time, from 73% in 2012 (see *Figure 3*).

In 2021, the top five factors in a choice of a provider are:

1. Reputation (80%)
2. Price (71%)
3. Specialism (70%)
4. Speed of delivery (68%)
5. Local offices / convenience (61%)

Price and speed of delivery are important in choosing conveyancing providers compared with other service types; consumers rating price (81%) and speed of delivery (77%) as the most important factors. This is in line with findings from previous years.

There has been an increase in the proportion of consumers stating that offering an online service that can be accessed at any time and tracked is important for them when choosing a provider. This has increased from 27% in 2020 to 35% in 2021. Interestingly, this has been relatively stable over the past 9 years, suggesting that the increase is a result of the COVID-19 pandemic.

This is particularly important for those who have used a legal service during the COVID-19 pandemic, since March 2020 (42% vs. 31% of those who have used a legal service in the last two years but before the pandemic).

With many face-to-face legal services suspended during the pandemic and its resulting lockdowns, being able to access services online has been key to ensuring people get the support they need.

A service being available online that can be accessed at any time and tracked is rated as more important for the following service areas:

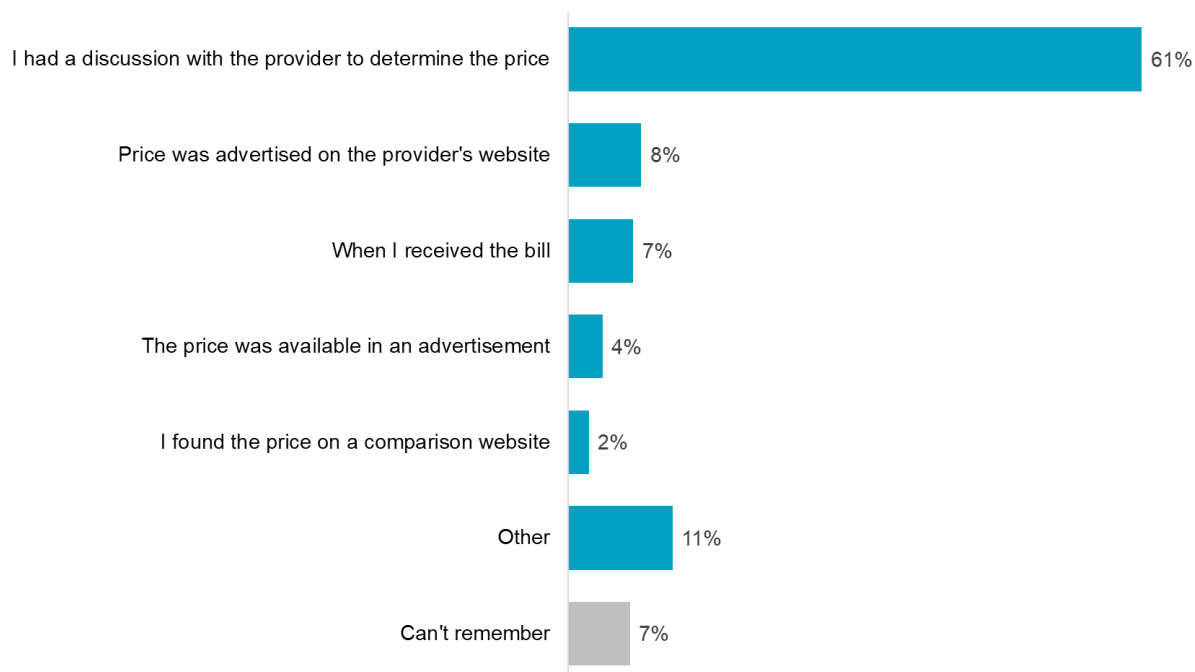
1. Problems with consumer services or goods (50%)
2. Housing, landlord or tenant problems (44%)
3. Accident of injury claims (42%)
4. Immigration matters (41%)
5. No win no fee (41%).

Price transparency

Consumers most commonly find the price of the service through talking to a provider (61%), as opposed to other means. This has remained broadly comparable over time, with the same proportion reporting this in 2017.

A much smaller proportion say they saw the price advertised on the provider's website (8%) or got it when they received the bill (7%) (see *Figure 4*).

Figure 4. How consumers find out about the price of the service



Base: All legal service users (2021=3500)

Among those using conveyancing services, the majority (79%) say they had a discussion with the provider to determine the price; this is higher than average (61%). Those using a legal service for probate (14%), housing, landlord or tenant problems or family matters (both 12%) are more likely to say that they found out the price on receipt of the bill.

Ease of understanding price information

For the majority of consumers (77%), it was easy to understand the information about the price of the legal service they used. This is consistent with findings from previous years. Just 6% of consumers found it difficult to understand the price information, which has also remained relatively stable over time.

By service area, those using commoditised services, such as a will writing service, were most likely to say they found it easy to understand the information about the price (89%).

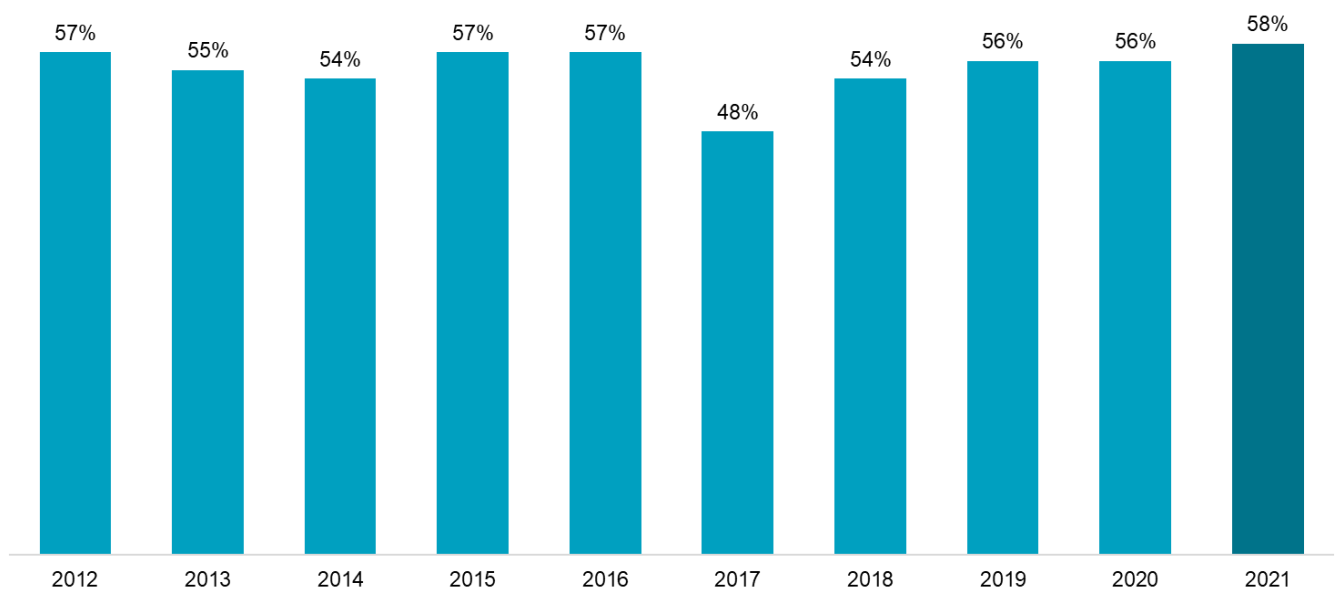
Power of attorney (80%) and conveyancing (79%) are also areas where consumers reported finding it easy. By contrast, a lower proportion of those using more complex services for employment disputes (64%) or accident or injury claims (61%) reported finding it easy to understand.

Older consumers, who may have previous experience of dealing with legal service providers (and are more likely to be using a will writing service), are the age group most likely to say they found the information easy to understand (80% of 55+ age group compared with 70% of 35-44 and 55% of 18-24 year olds).

Making comparisons between providers

59% of consumers say it is easy to make comparisons between different providers (see *Figure 5*). This figure remains unchanged over the past ten years.

Figure 5. Proportion of legal services consumers saying it was easy to make comparisons between providers



Base: All legal service users who shopped around, 2012=361, 2013=296, 2014=277, 2015: 278, 2016: 388, 2017=457, 2018: 993, 2019:1033, 2020=1099, 2021=1066.

In 2016, the CMA recommended in its legal services report² that legal services providers should publish a description of their services on their websites: details of different staff who

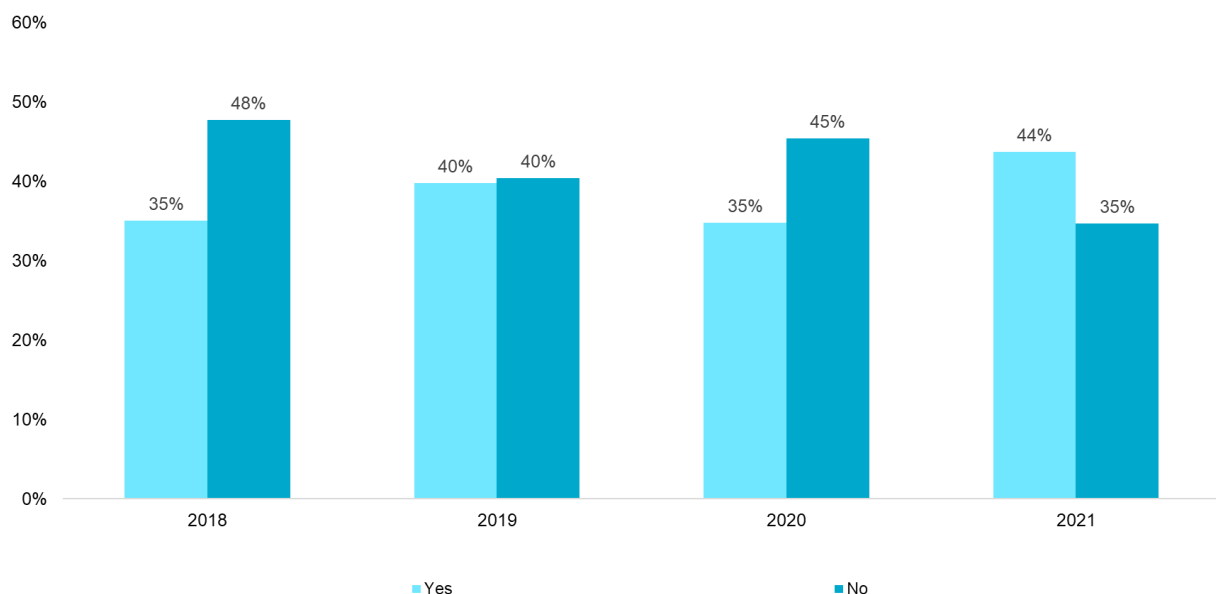
² [CMA \(2016\) Legal Services Market Study](#)

deliver services, a timeline showing when key stages of the work will be completed, and any factors that could affect these.

The proportion of consumers saying that they can recall seeing this information on staff, services or timings for delivery has fluctuated (see *Figure 6*). Since 2020, there has been an increase in the proportion reporting they could recall seeing this information, suggesting there is now some progress towards that goal (35% to 44%). Recall is particularly high among those who have used a legal service during the COVID-19 pandemic since March 2020 (50% vs. 38% of those who used a legal service in the last two years but before the pandemic).

This corresponds closely to the increased use of online service delivery by consumers during the pandemic (54% compared with 36% who used a legal service in the last two years, but before the pandemic).

Figure 6. Awareness of whether providers are following the CMA recommendations on publishing a description of services provided on their websites



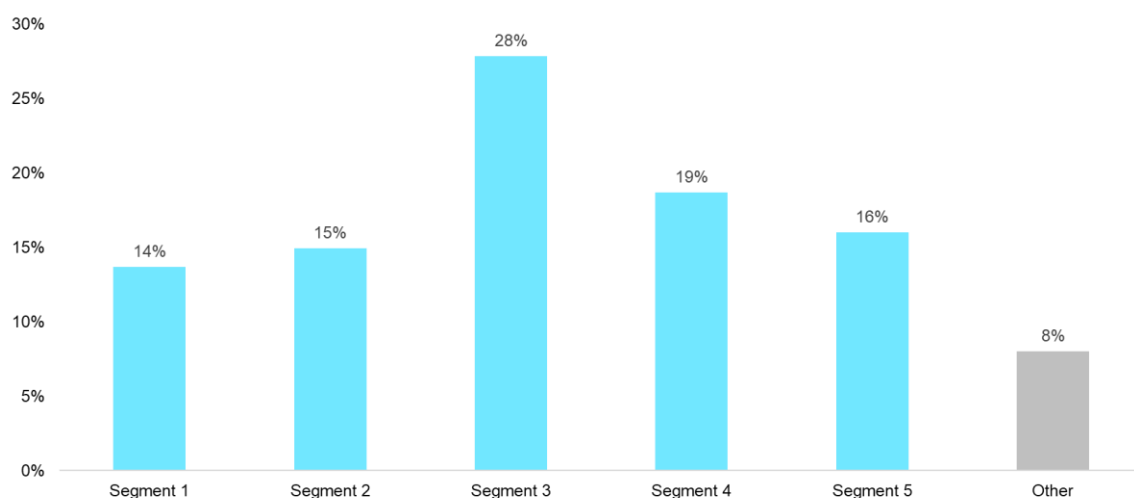
Base: All legal service users who shopped around, 2018: 993, 2019: 1033, 2020: 1099, 2021=1066.

A consumer segmentation: how consumers choose legal services

This year, we conducted a consumer segmentation exercise, based on how people shop around and choose their legal services provider. This involved identifying key questions in the survey with a focus on how people *choose* legal services, and using them to map out the consumer journey. The segments identified in the data are (see *Figure 7*):

- **Segment 1: Swift shoppers:** Shopped around but compared quickly (less than a week).
- **Segment 2: Considered consumers:** Shopped around but took longer to decide on their provider (a week or more).
- **Segment 3: Confident consumers:** Did not shop around but confident in the amount of choice they had, and very confident that their provider would deliver a good service.
- **Segment 4: Choice confident but service suspicious:** Did not shop around but confident in the amount of choice they had, though less confident that their provider would deliver a good service.
- **Segment 5: Choice deprived:** Did not shop around and doubted the amount of choice they had.

Figure 7. Segment breakdown



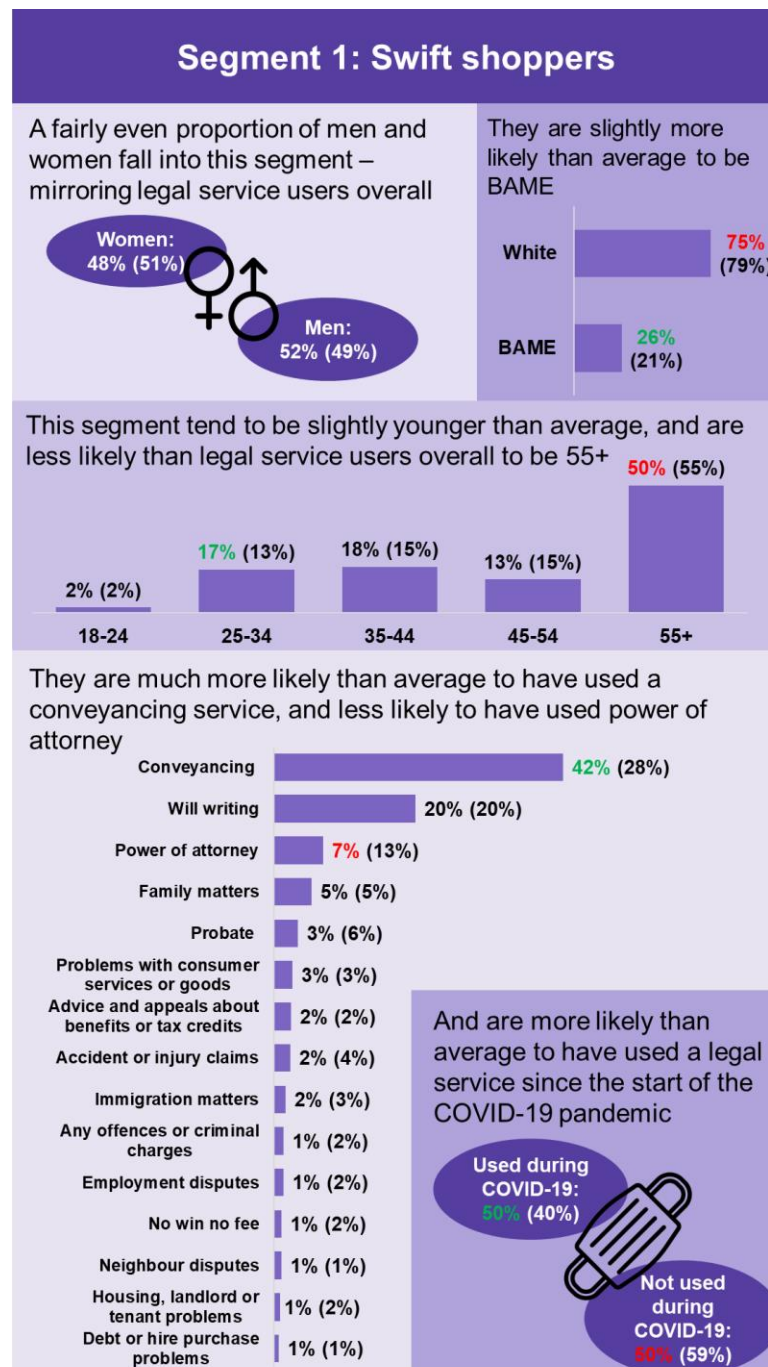
Following this, 14 in-depth interviews (30-45 minutes) were conducted via Zoom / over the phone with legal service users, to further explore the consumer journey. This equated to 2-4 in-depth interviews per segment. Respondents were recruited from the survey and used a mix of different types of legal services.

The findings of this exercise can be found below. On the charts, a figure in green means it is statistically significantly higher than that of legal service users overall, and a figure in red means that it is statistically significantly lower.

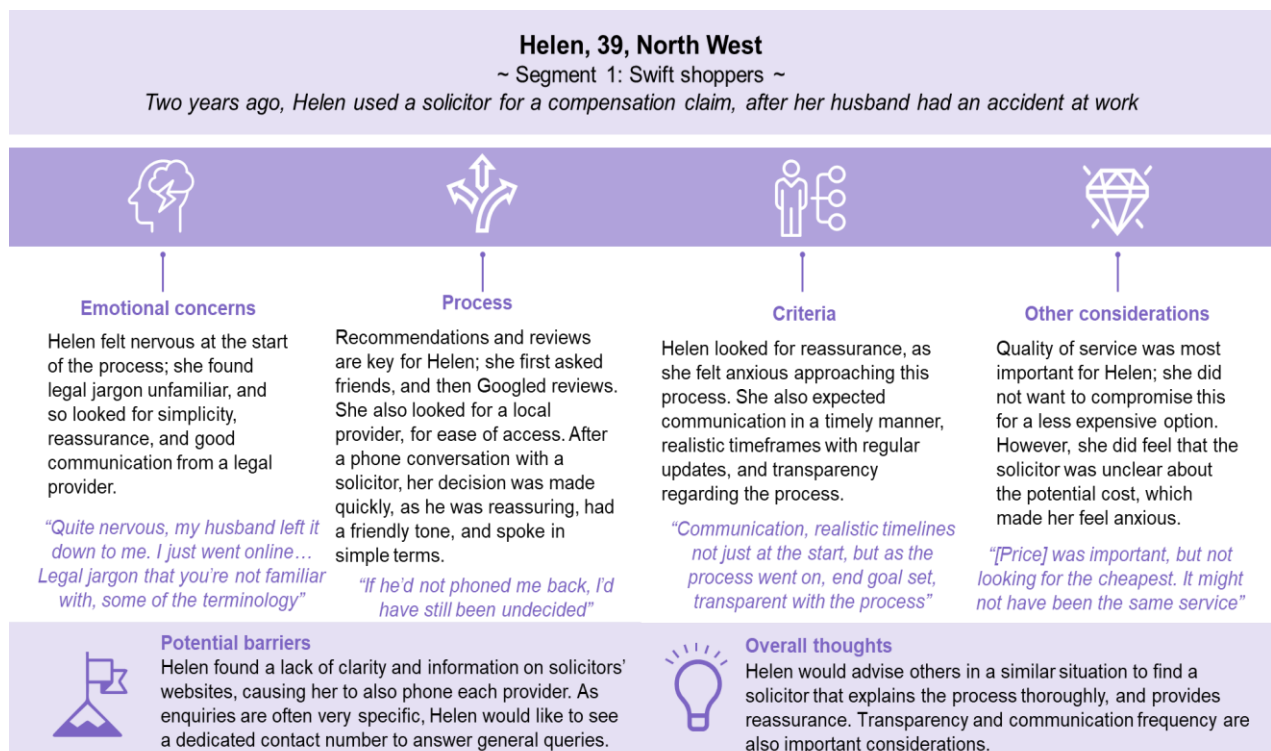
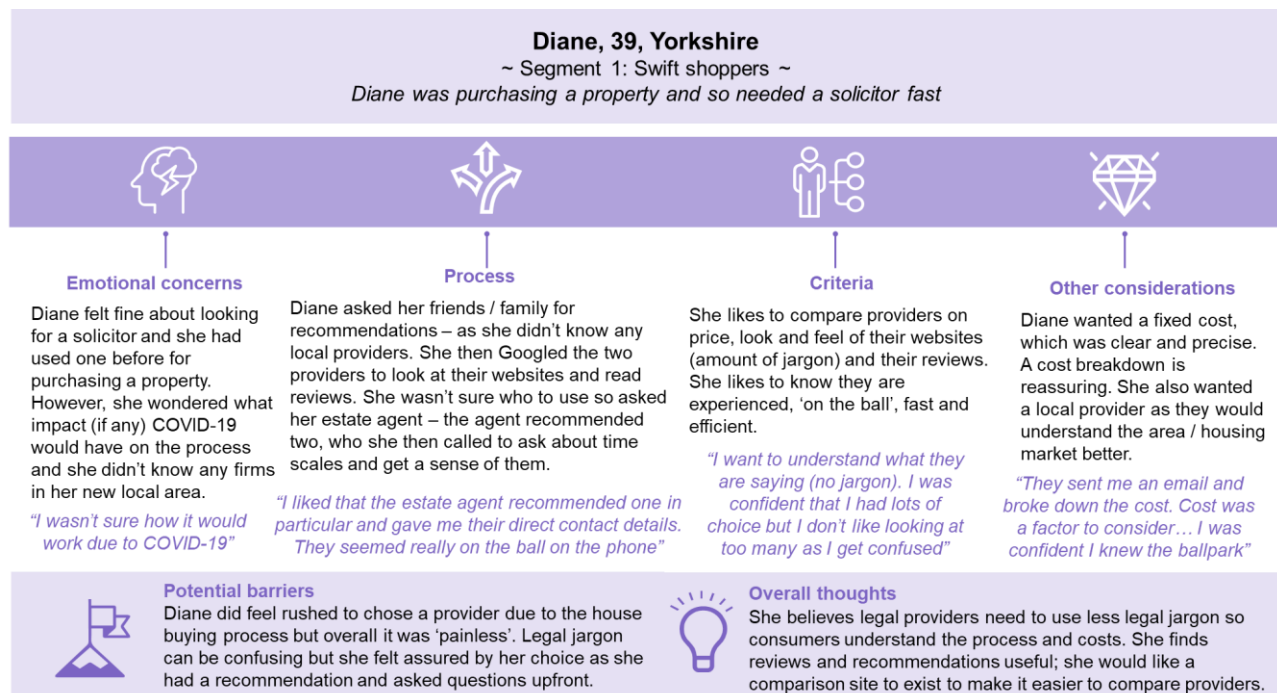
Segment 1: Swift shoppers

Swift shoppers are consumers who shopped around, but compared quickly (less than a week). They are much more likely than legal service consumers overall to have used a legal service for conveyancing; as noted in the above 'Who shops around?' section.

Those using a legal service for conveyancing are among those most likely to shop around. These consumers are slightly more likely than legal service consumers overall to be BAME, and tend to be slightly younger than average.

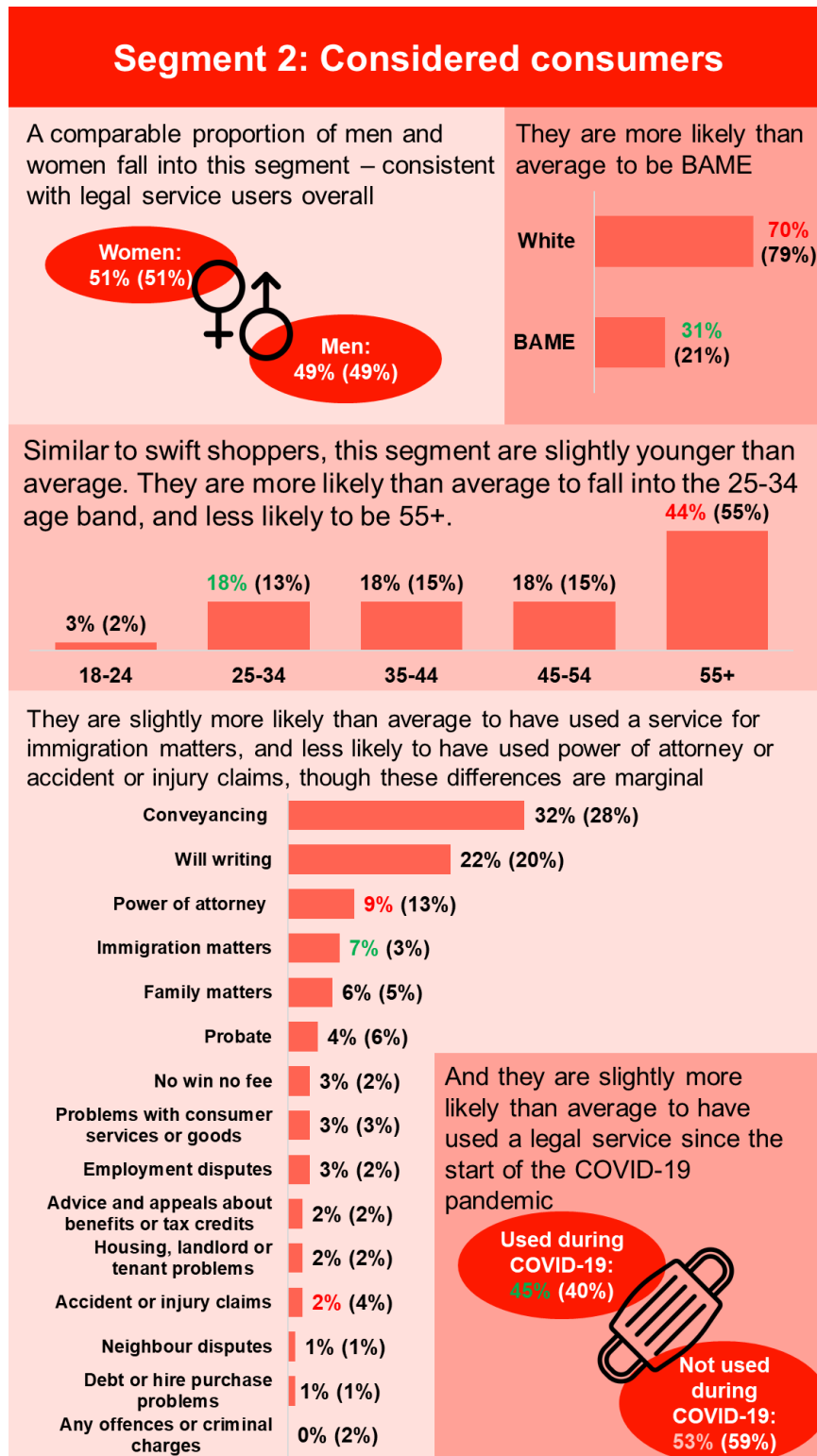


The case studies below give insight into the experiences of two swift shoppers buying different types of service - conveyancing (42%) and injury claim (2%).

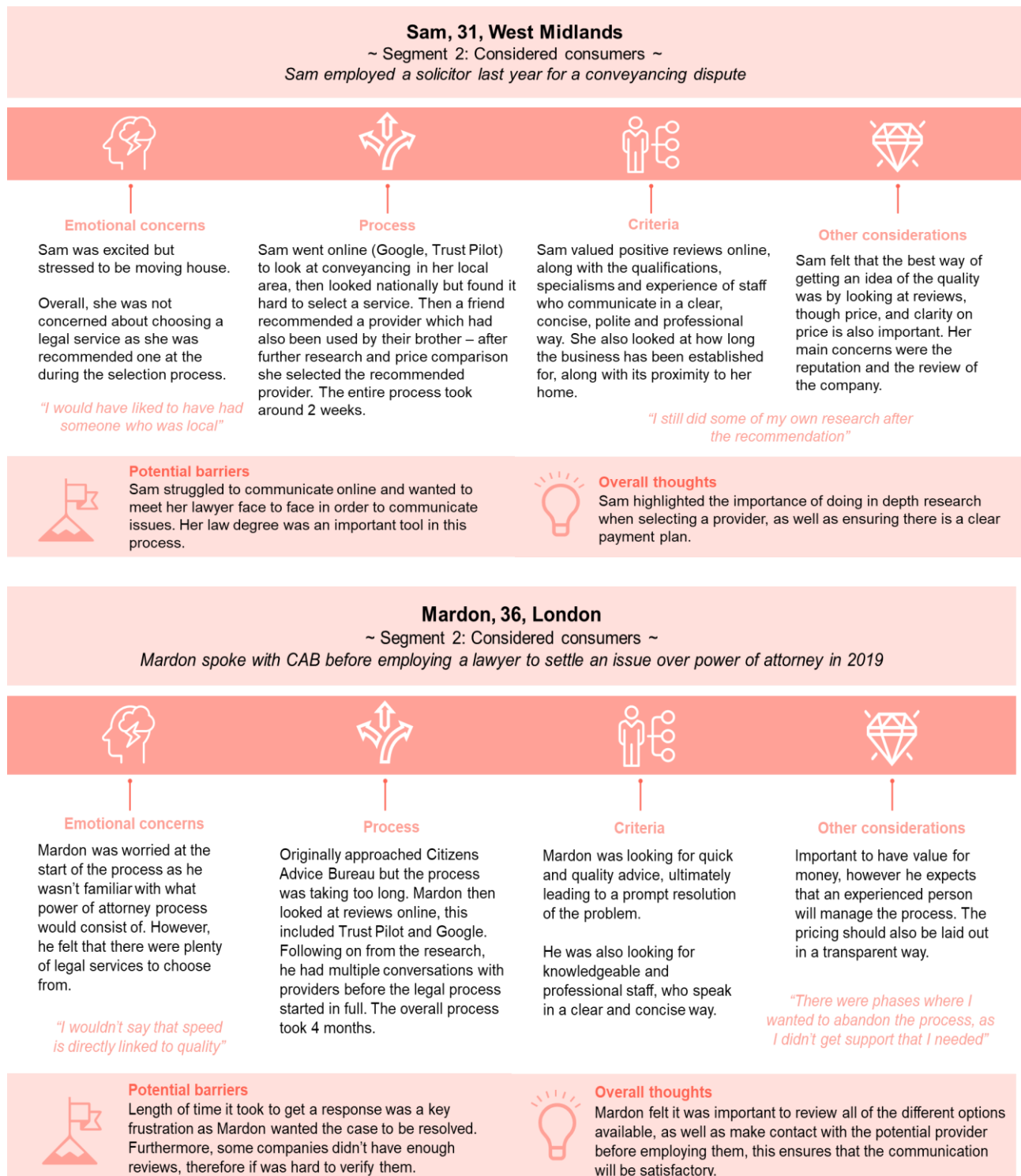


Segment 2: Considered consumers

Considered consumers also shop around, but take longer to decide on their provider (a week or more). These consumers tend to be younger than legal service users overall and they are also more likely to be BAME.

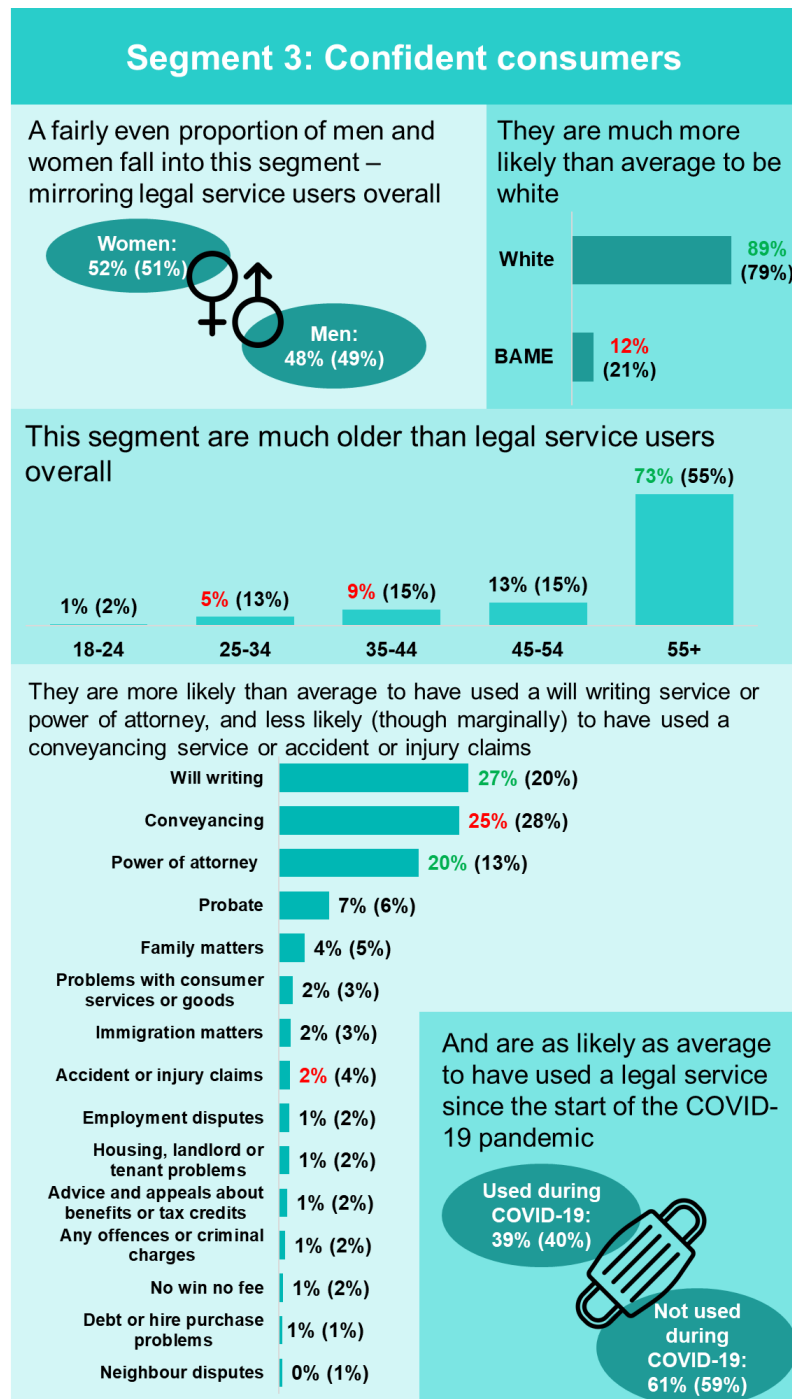


The case studies below give insight into the experiences of two considered consumers, again buying different types of service - conveyancing (32%) and power of attorney (9%).

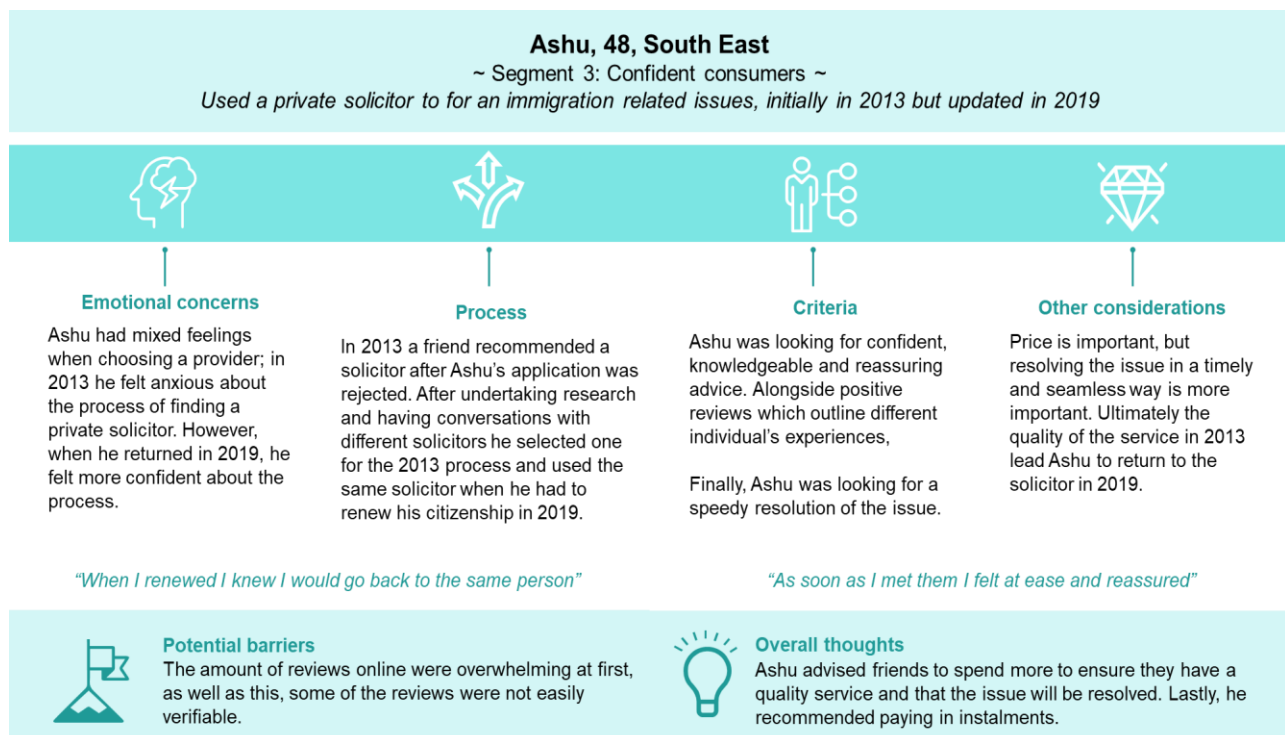
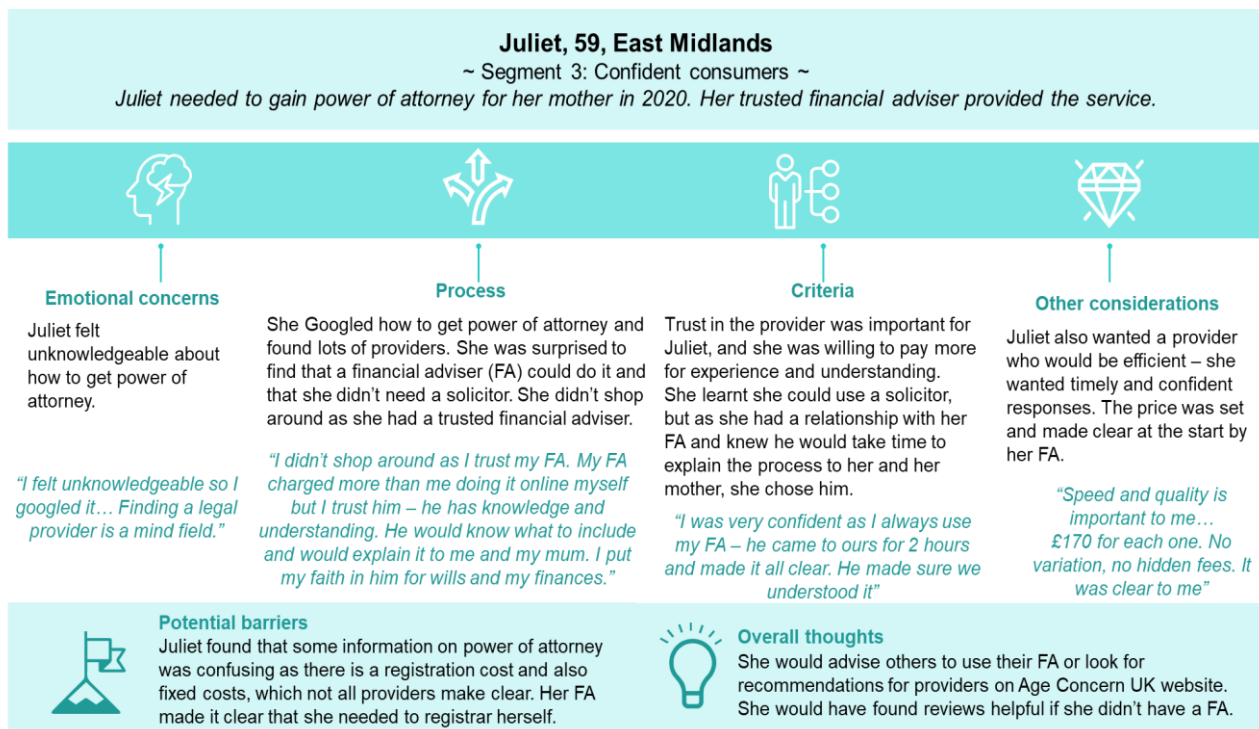


Segment 3: Confident consumers

These consumers are confident in the choice they had and that their provider would deliver a good service. They did not shop around for their provider. They are more likely than legal service consumers overall to be white and older (55+). Linked with their age, they are more likely to have used a legal service for will writing or power of attorney.

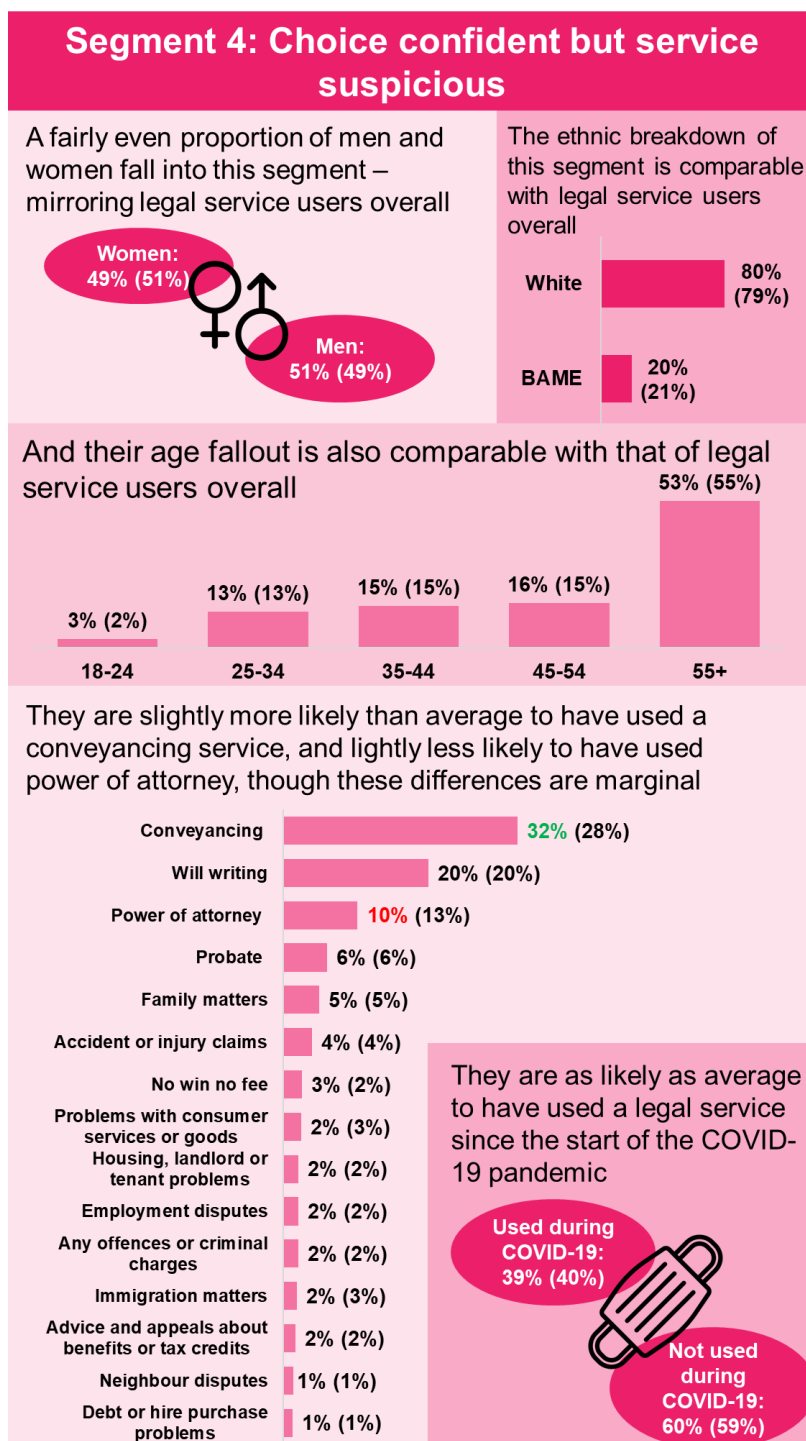


The case studies below give insight into the experiences of two confident consumers buying different types of service - power of attorney (20%) and immigration matter (2%).

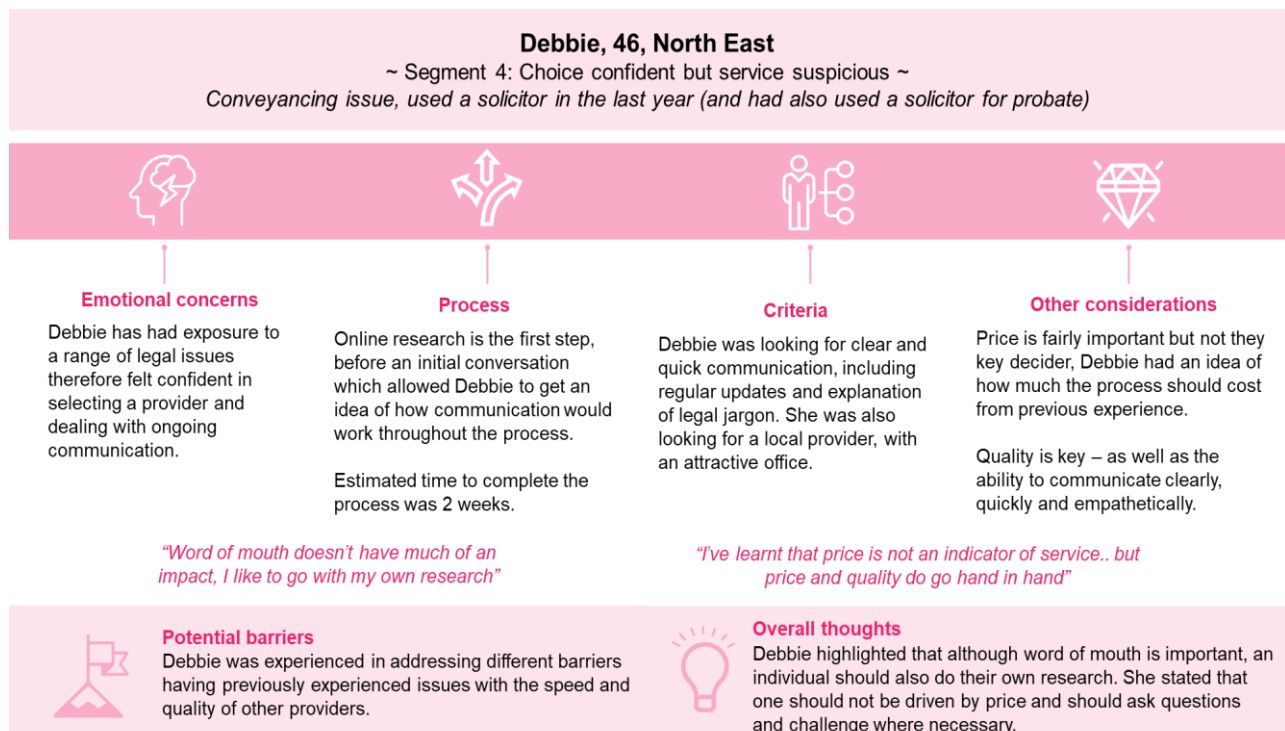
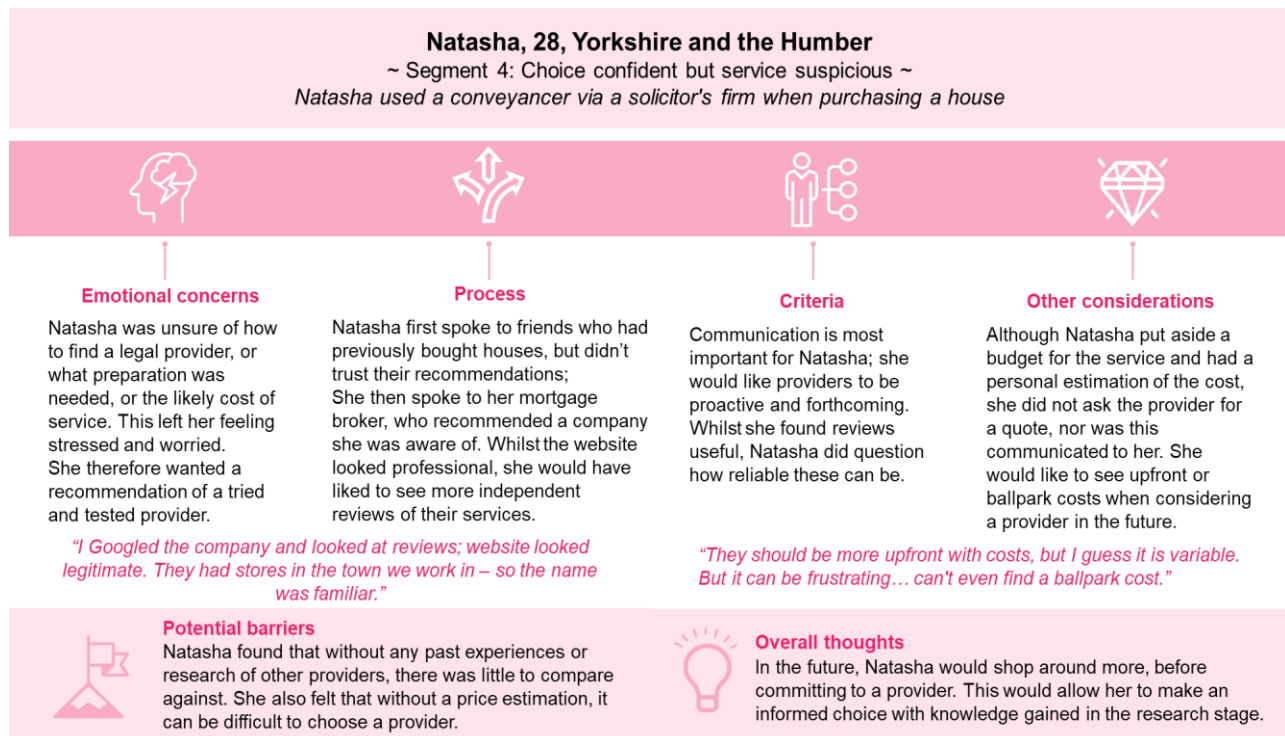


Segment 4: Choice confident but service suspicious

The choice confident but service suspicious segment did not shop around, but are confident in the amount of choice they had, though less confident that their provider would deliver a good service. They have a very similar demographic breakdown to legal service consumers overall in gender, ethnicity and age. Linked to this, they tend to use the same legal services as the average legal service consumers.

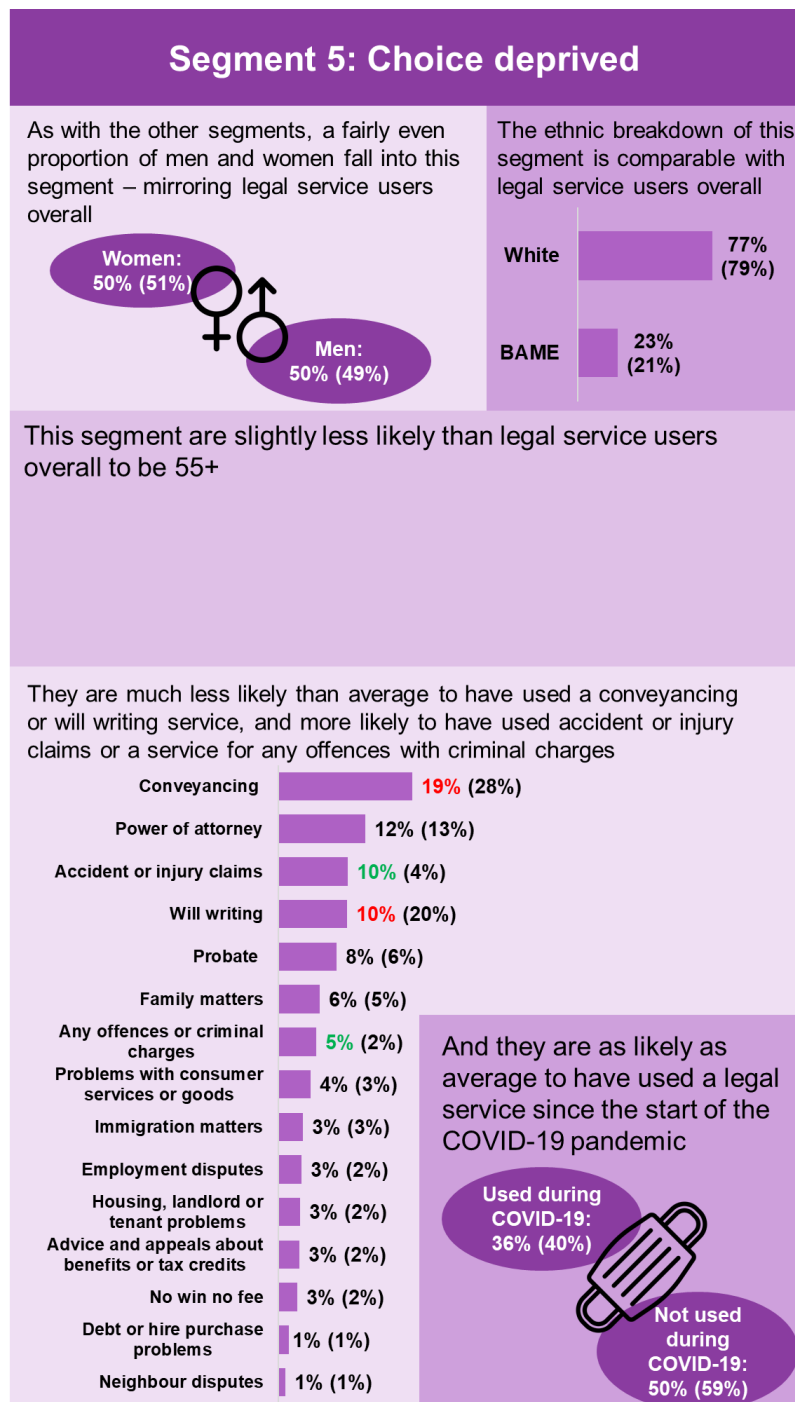


The case studies below give insight into the experiences of two consumers who are choice confident, but service suspicious buying different types of service - conveyancing (32%) and probate (6%).









Segment 5: Choice deprived

The choice deprived segment did not shop around and doubted the amount of choice they had. They also have a fairly similar demographic breakdown to legal service users overall, though they are slightly less likely to be aged 55+. They are less likely than legal service users over to have used a conveyancing or will writing service (in keeping with their age) and more likely to have used accident or injury claims or a service for any offences with criminal charges.









The case studies below give insight into the experiences of two consumers who are choice deprived, buying different types of service - neighbour dispute (1%) and bankruptcy (0%).

Jay, 36, London
~ Segment 5: Choice deprived ~
Jay contacted a legal advice service 9-10 months ago via a gov.uk webpage, after experiencing issues with his neighbour. The advice service then directed him to a solicitor.

			
Emotional concerns Jay felt nervous and overwhelmed at the start of the process; he had previously contacted the police, the council, and his landlord who were unable to help. This left him feeling uncertain if a legal route would be suitable. <i>"I found accessibility slightly unusual – we spoke to a couple of solicitors who didn't deal with this, so we spoke to the civil legal advice"</i>	Process Jay found the process straightforward. After he contacted the advice service, he was directed to one specific solicitor. Jay appreciated that he was not overwhelmed with choice, and communication was consistent. <i>"They took care of everything, rather than giving me a million choices of different firms"</i>	Criteria Jay looked for testimonials, as well as transparency of price. Experience was important to Jay, as well as an established firm; this provided reassurance. Friendliness was also key; as he approached the process intimidated, he looked for a personalised and friendly service. <i>"Experience, knowing that they'd done something like this before. Established, they know what they're doing. Friendliness... so it feels more personalised."</i>	Other considerations Jay was concerned that the quality of service via an advice service may not have been as good as going direct. However he felt confident after getting in touch. Price was a top consideration for Jay, however there often lacked a clear cost estimate.
Potential barriers  Jay would like to see a general website, which could direct users to a specific service. Also, he would like to see more support available for older / disabled people who may struggle accessing this information online.		Overall thoughts  In the future, Jay would recommend others to go directly to the government advice service, as his own experience was positive and efficient. There was also an added trust via the gov.uk website.	

Claire, 59, East of England
~ Segment 5: Choice deprived ~
Claire needed to declare herself bankrupt in 2020. She used an official receiver via the government website.

			
Emotional concerns Claire didn't know how to find a legal service to help her become bankrupt. She worried it would cost her money she couldn't afford. <i>"It was very scary at first as I didn't know what to do... I am a single parent on low income. I couldn't afford a lawyer. I didn't know what to do. I was at my wits end."</i>	Process Claire called Citizens Advice (which she had used before) to ask how to become bankrupt. They were not overly helpful but suggested she looked on an online forum. People on the forum told her to look at the Official Receivers Government website. She completed a form and had a telephone interview. <i>"There was no other way unless I became bankrupt myself. It was not easy until I found the online forum."</i>	Criteria Claire didn't feel she had a choice in provider so didn't shop around. She didn't know what to expect in regards to the process or service. However, she became confident in the service after speaking to a staff member who was kind, sensitive and reassuring. <i>"There was only 1 provider. They are the experts – they only deal with bankruptcy and are the government."</i>	Other considerations It was important that the price was low as she has financial problems. The Official Receivers website and the forms were clear about the price (£700), which she found reassuring. <i>"I was told straight up, which was reassuring. It was fine as I knew in advance and you could pay in instalments."</i>
Potential barriers  Claire found there to be a lack of information online and from Citizens Advice on how to become bankrupt. Cost was a barrier to using a legal service to become bankrupt.		Overall thoughts  She would advise that people look online for forums to meet people going through a similar experience who can advise which legal service they used.	

