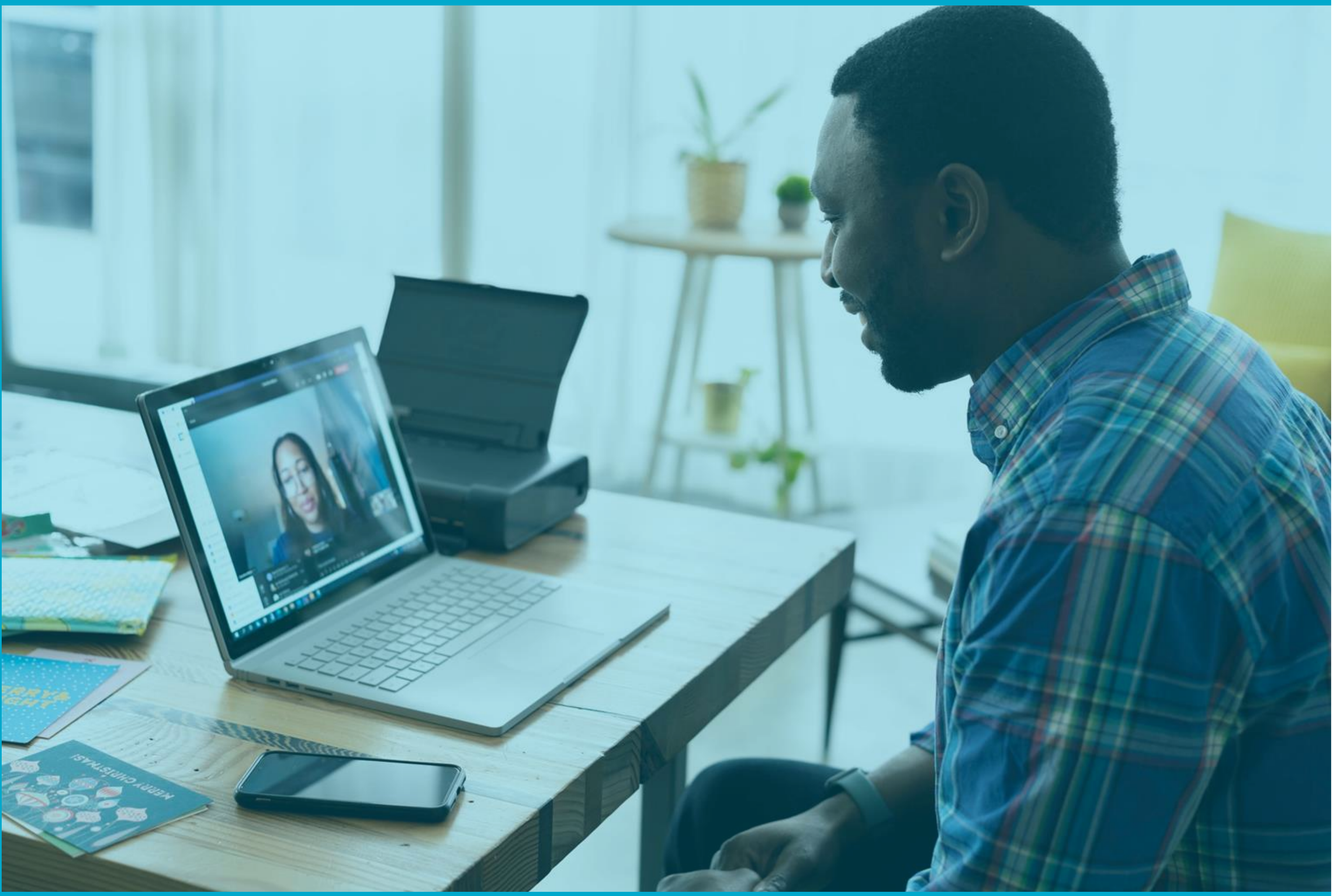
Legal Services Consumer Panel

Tracker Survey 2021

How consumers are using legal services

June 2021



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Key findings: 2021

- 83% of consumers remain satisfied with the service they received from their provider. This remains a marginally higher level of satisfaction than in 2012 (79%).
- While overall levels of satisfaction with legal services provided remain high, consumers who felt they had limited choice of provider or who wanted to shop around but did not know how to, are more likely to be dissatisfied with the service they received.
- 65% of consumers say that the overall service and advice provided is good value for money, in line with the previous year.
- 60% of consumers who used a legal service during the COVID-19 pandemic said that the experience was as they expected. However, consumers were more likely to say that the experience was better (26%) than they expected rather than being worse (10%).
- Online delivery was previously increasing and this year it jumped to 44% of those people who used a legal service in the past two years. This increase is driven by those people who used a legal service during the COVID-19 pandemic, with 54% saying the service was delivered online compared with 36% who used a legal service in the last two years but before the pandemic.
- There has been no significant change in the use of unbundling since last year with 16% reporting unbundling. Those people who used a legal service during the COVID-19 pandemic were more likely than those who used a service before the pandemic to unbundle the legal service and carry out parts of the service themselves (19% vs. 14%).

Key findings: 10 years on

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

- The delivery of legal services through online methods have more than doubled from 21% of all services to 44% in 2021. Although there has been a large increase in 2021 in online delivery due to the COVID-19 pandemic, in 2020 34% of consumers accessed services online.
- Overall, there have been small increases in levels of satisfaction with the outcome (up to 89% from 84%) and the service received (up to 83% from 79%).
- Areas of service level satisfaction that have increased since 2012 are:
    - The clarity of information on the costs to be charged – increased (78% vs. 70%),
    - The clarity of information on the service to be provided – increased (82% vs. 76%),
    - The extent to which you were treated as an individual, not just another file – increased (76% vs. 70%).
- The knowledge of how to make a complaint, if people were dissatisfied with the service that they received, has increased from 48% to 56% in 2021.
- In 2021, legal services were more likely to be self-funded than they were in 2012 (69% from 56%).
- There has been a large increase in the use of fixed fee arrangements (52% from 38%).
- Overall, perceptions that the service received was value for money have increased from 58% of consumers in 2012 to 65% in 2021.

Note on the methodology

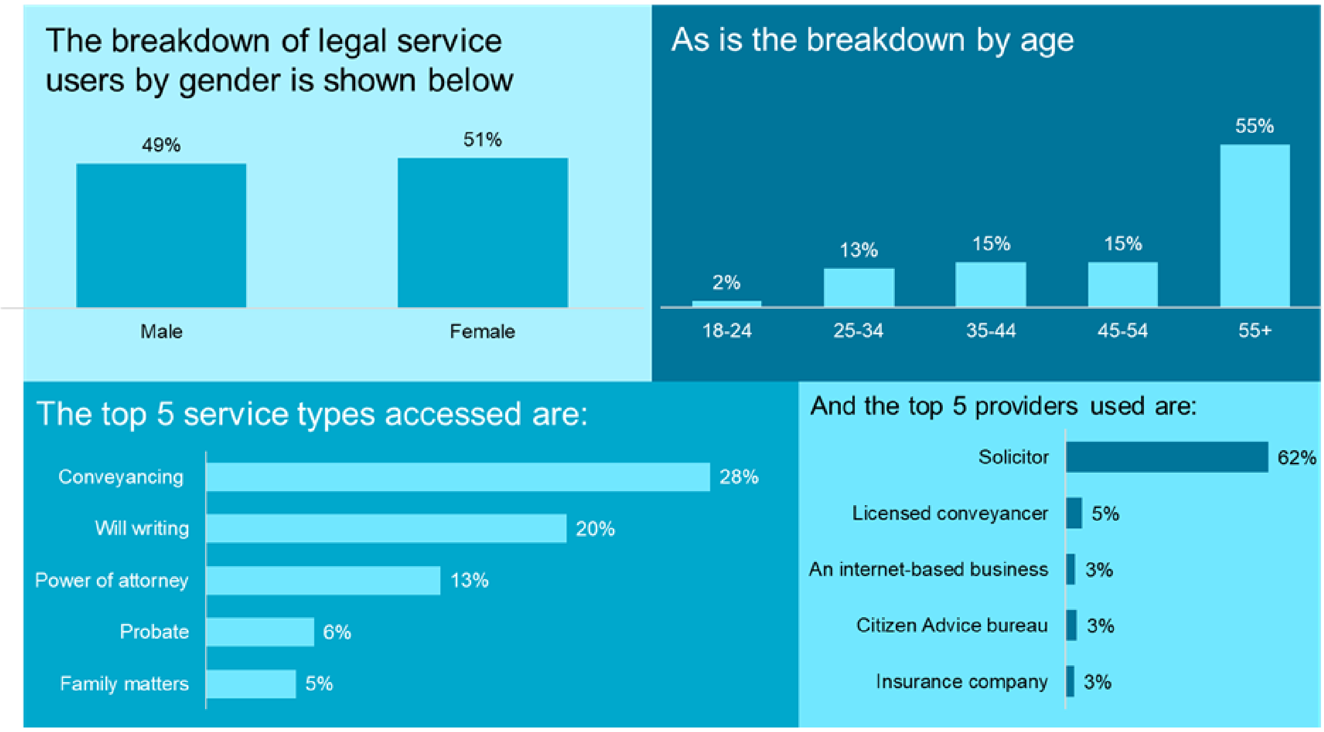
For the last ten years the Panel has commissioned YouGov to conduct an annual survey of people who have used legal services in the last two years. This year we surveyed 3,500 legal service users.

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), but indicate a failure to detect differences due to sampling variation. Fieldwork took place between 11 February and 11 March 2021.

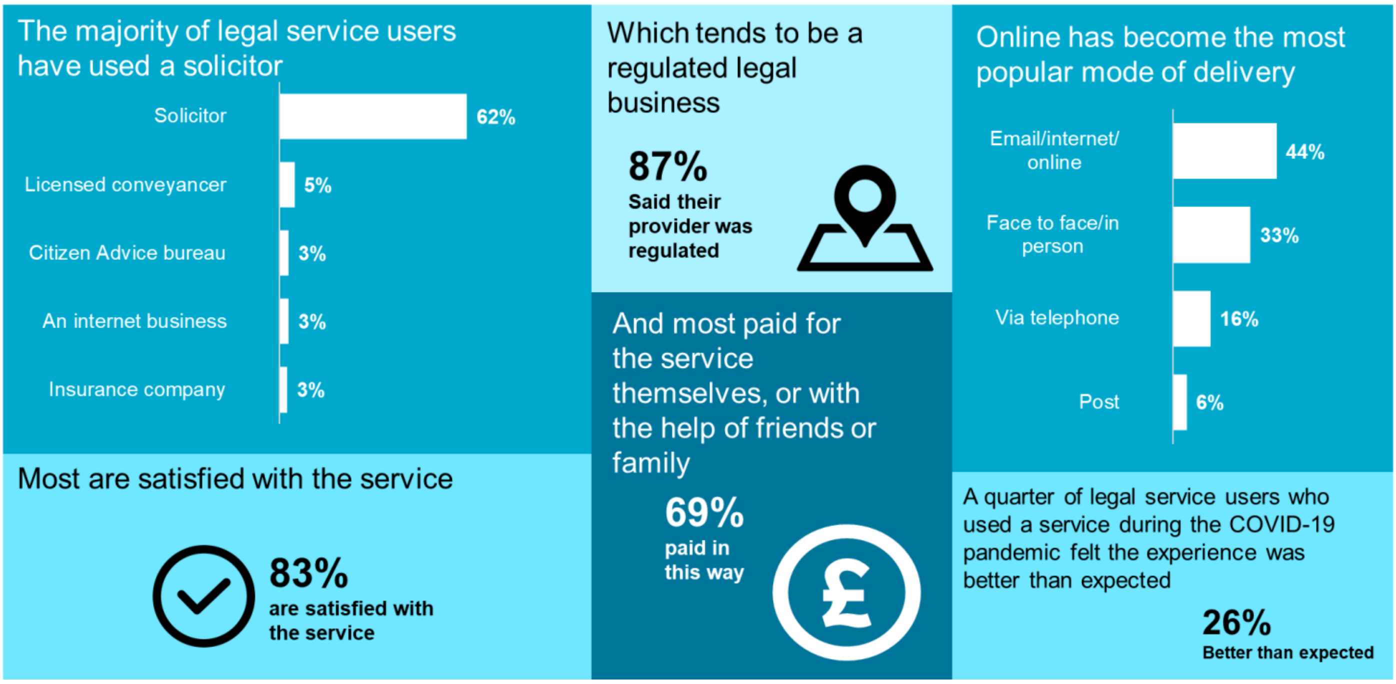
The research asks people to reflect on a legal service they have used in the past two years and 40% of the sample said that the service they used was delivered since the start of the coronavirus (COVID-19) pandemic, e.g. March 2020. Throughout the report, comparisons are made between this group, and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

Sample profile



How consumers are using legal services



Service element satisfaction

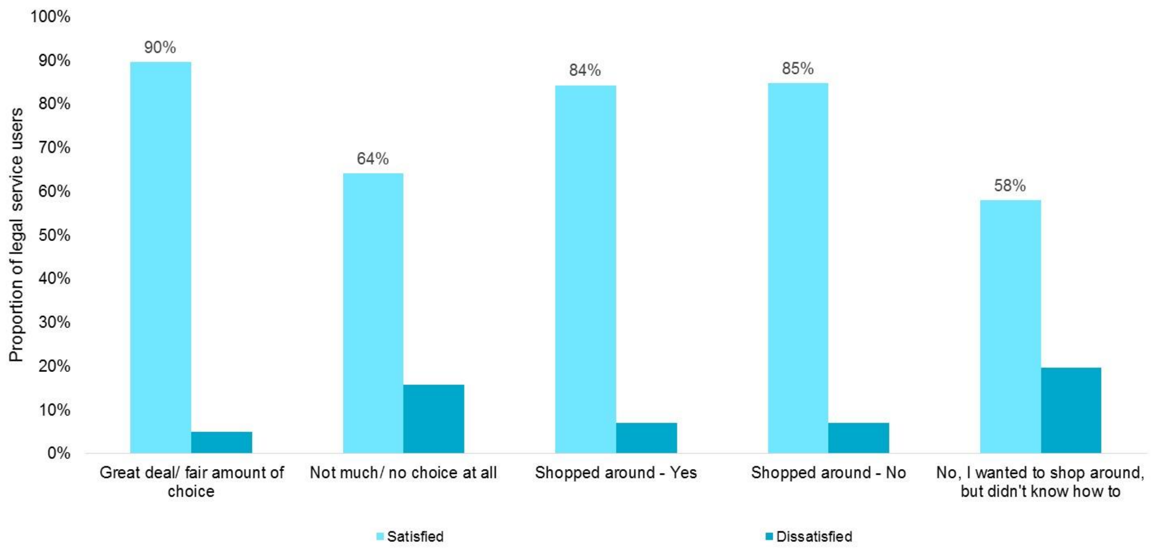
Most consumers (83%) remain satisfied with the service they received from their provider. This remains a marginally higher level of satisfaction compared to 2012 (79%). Consistent with last year, those who used legal services for will writing (93%) and power of attorney (90%) are most likely to be satisfied with the service they received. It is noteworthy that these are services where the output is a document whose quality can only be determined by a professional.

While overall levels of satisfaction with legal services provided remain high, those consumers who felt they had limited choice of providers or who wanted to shop around but did not know how to are more likely to be dissatisfied with the service they received.

Overall, satisfaction with the service provided stood at 64% for those who felt they did not have much choice of provider and at 58% for those people who wanted to shop around but did not know how to (see *Figure 1*).

Satisfaction levels across all elements of service provision remain high. The clarity of information on the service to be provided (82%), professionalism (82%), the quality of the advice (81%) and clear explanation of the matter (81%) have the highest satisfaction levels across different service elements (*see Figure 2).*

Figure 1. Satisfaction with overall service delivered by levels of choice and shopping around

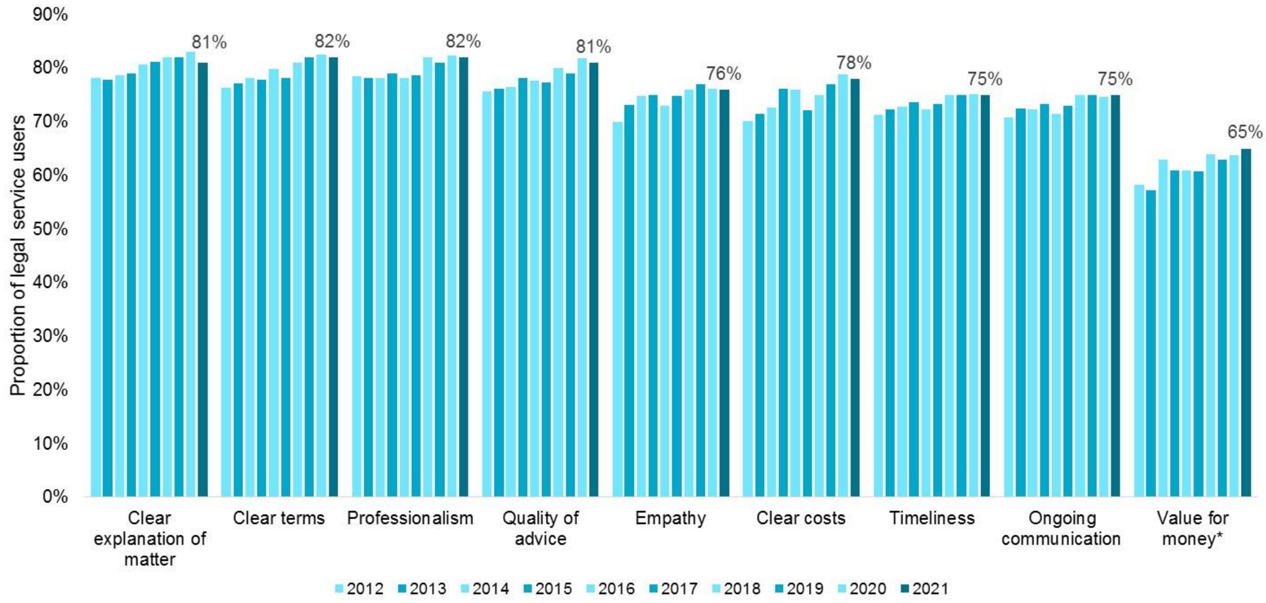


Base: All legal service users who had a great deal/ fair amount of choice (n=2,631), not much/ no choice at all (n=733), shopped around – yes (n=1,066), shopped around – no (n=2,205), wanted to shop around but did not know how (n=111)

Clarity of information on costs to be charged has seen the greatest increase over the past 10 years, from 70% in 2012 to 78% in 2021.

As reflected in overall satisfaction, those who used a will writing service have the highest levels of satisfaction with all elements of service. This is consistent with last year.

Figure 2. 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, 2019=3589, 2020=3623, 2021=3500)

65% of consumers say that the overall service and advice provided is good value for money, in line with the previous year. Again, consistent with last year, just 9% of consumers say that the service they received is poor value for money.

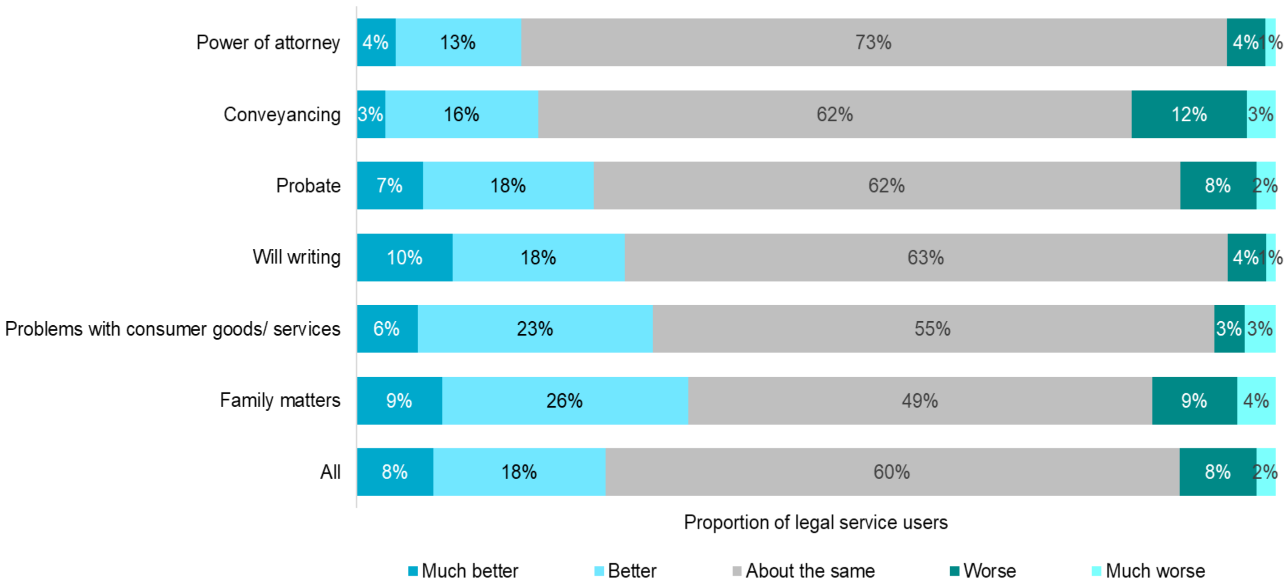
As with overall satisfaction, will writing is considered the best value for money (77%). This is followed by employment disputes (74%) and problems with consumer services or goods (71%).

Perceptions of services delivered during the COVID-19 pandemic

Consumers who had used legal services during the pandemic were asked if the experience was as they expected it to be. 60% of consumers said that the experience was as expected. However, consumers were more likely to say that the experience was better (26%) than they expected, rather than worse (10%).

There are some interesting differences by the type of legal service consumers accessed (see *Figure 3*). Consumers using a service for family matters were most likely to say that the experience was better than they expected (35%). With those using conveyancing most likely to say that the service was worse than they expected (15%).

Figure 3. Perceptions of whether the experience of using a legal service during the COVID-19 pandemic was better, worse or about the same as expected

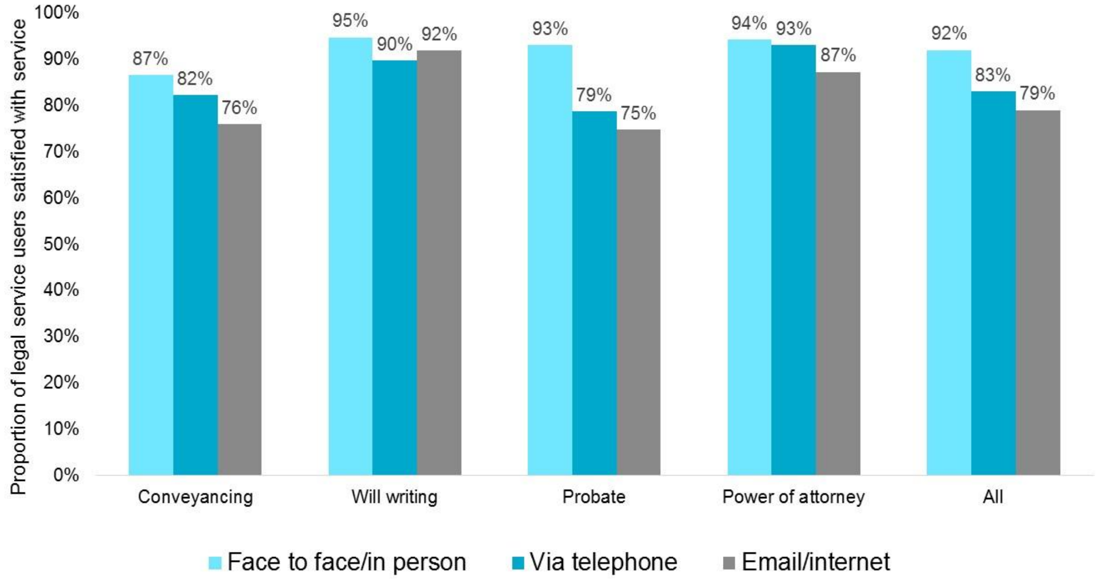


Base: All legal service users who used a legal service from March 2020 (2021=1413)

Differences in satisfaction by mode of delivery and funding of services

The majority of consumers (92%) who received their service face-to-face were satisfied with the service provided. By comparison, whilst the majority are satisfied, those who received the service online, including via email or the Internet have lower levels of satisfaction (79%).

Figure 4. Satisfaction with overall service delivered by channel of delivery across different types of legal service



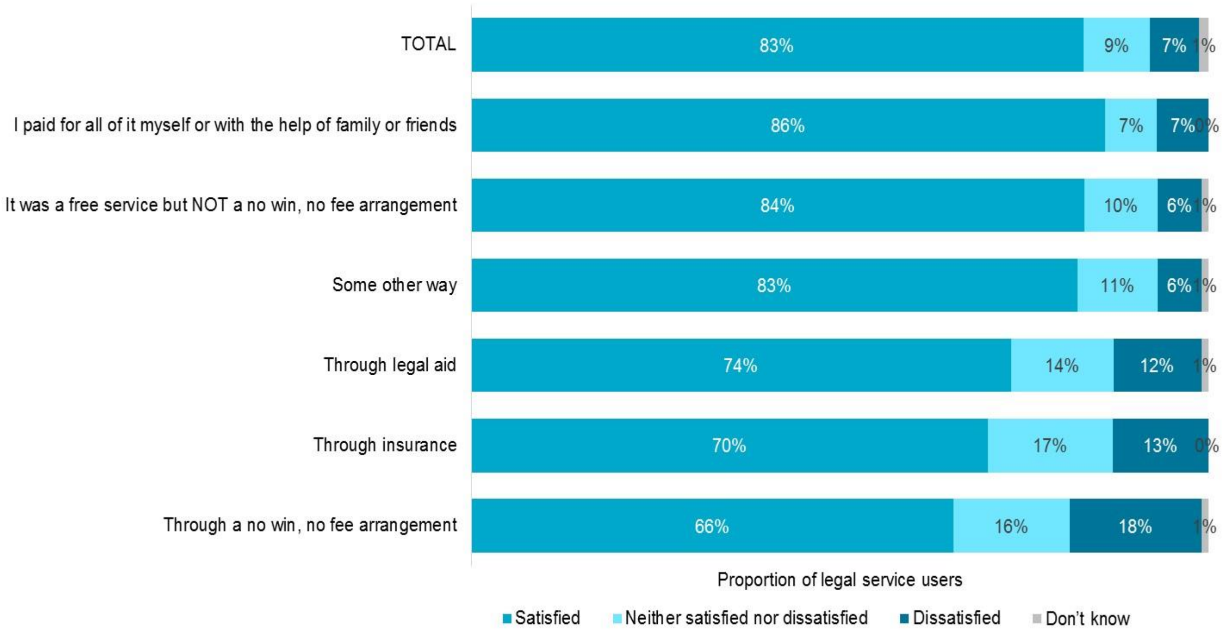
Base: All legal service users (n=3,500), conveyancing (n=1,058), will writing (n=810), probate (n=265), power of attorney (n=402)

Looking across the four most popular types of legal services accessed, we find that for conveyancing and probate it holds that those people accessing these services face-to-face remain more satisfied with the overall service delivered than those people who accessed these same services online. However, for will writing and power of attorney levels of satisfaction with services delivered either face-to-face or online are similar (see *Figure 4*).

There is a relationship between how services are funded and satisfaction with the service received *(see Figure 5)*.

Those who funded the service by themselves or with help from family or friends (86%) are most likely to have been satisfied with the service received. By contrast, those who received funding through legal aid (74%), insurance (70%), through a no win, no fee arrangement (66%) were least likely to be satisfied with the service received.

Figure 5. Satisfaction with service received by payment type



Base: All legal service users (2021=3500)

Outcome satisfaction

89% of consumers say that they are satisfied with the outcome of their legal matter, maintaining the increasing trend.

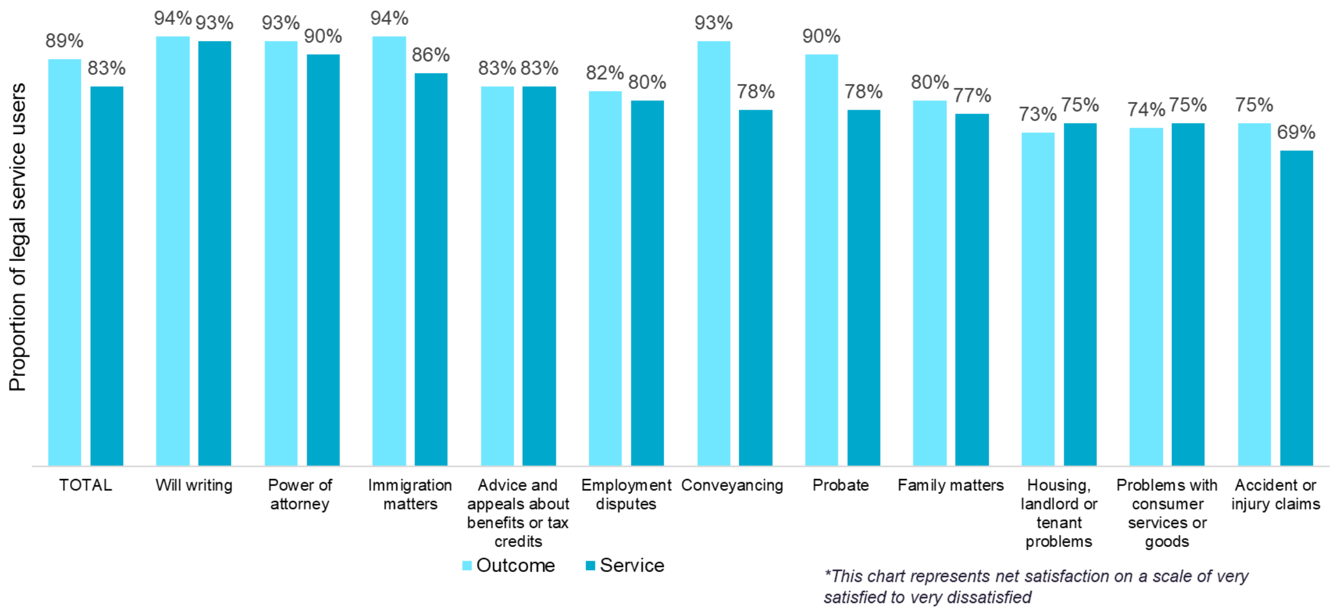
Satisfaction with the outcome is highest among those using legal services for will writing and immigration matters (both 94%), closely followed by conveyancing and power of attorney (both 93%) (*see Figure 6*). Whilst the majority are satisfied with the outcome of accident or injury claims (75%), they also have the highest levels of dissatisfaction (16%).

Delivery of legal services

This section discusses how legal services are delivered to consumers. This year there has been a reduction in the proportion of consumers who accessed a legal service in the past two years that was delivered face-to-face. Overall, 33% had their legal service delivered face-to-face, the lowest level since 2012 (*see Figure 7*).

Online delivery was previously increasing steadily and this year it jumped to 44% of those consumers who used a legal service in the past two years. This increase is driven by those consumers who used a legal service during the COVID-19 pandemic, with 54% saying the service was delivered online compared with 36% who used a legal service in the last two years but before the pandemic (see *Figure 8*).

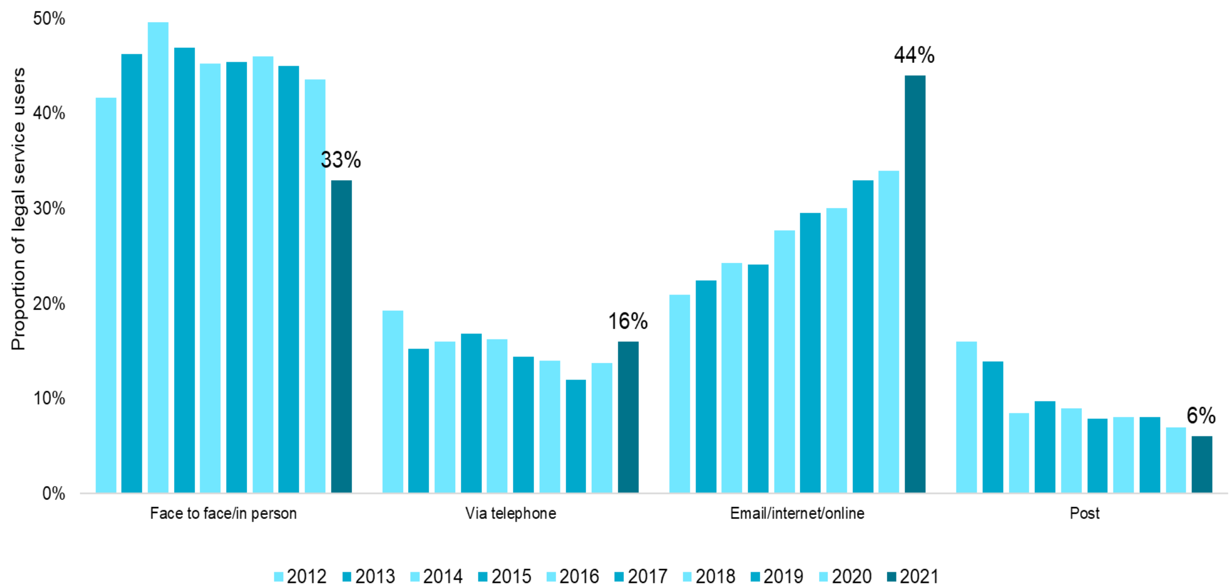
Figure 6. Satisfaction with service and outcome – by type of legal service accessed



Base: All legal service users (2021=3500)

This reflects the suspension of many face-to-face legal services during the pandemic and its resulting lockdowns .

Figure 7. How legal services are delivered – time series analysis

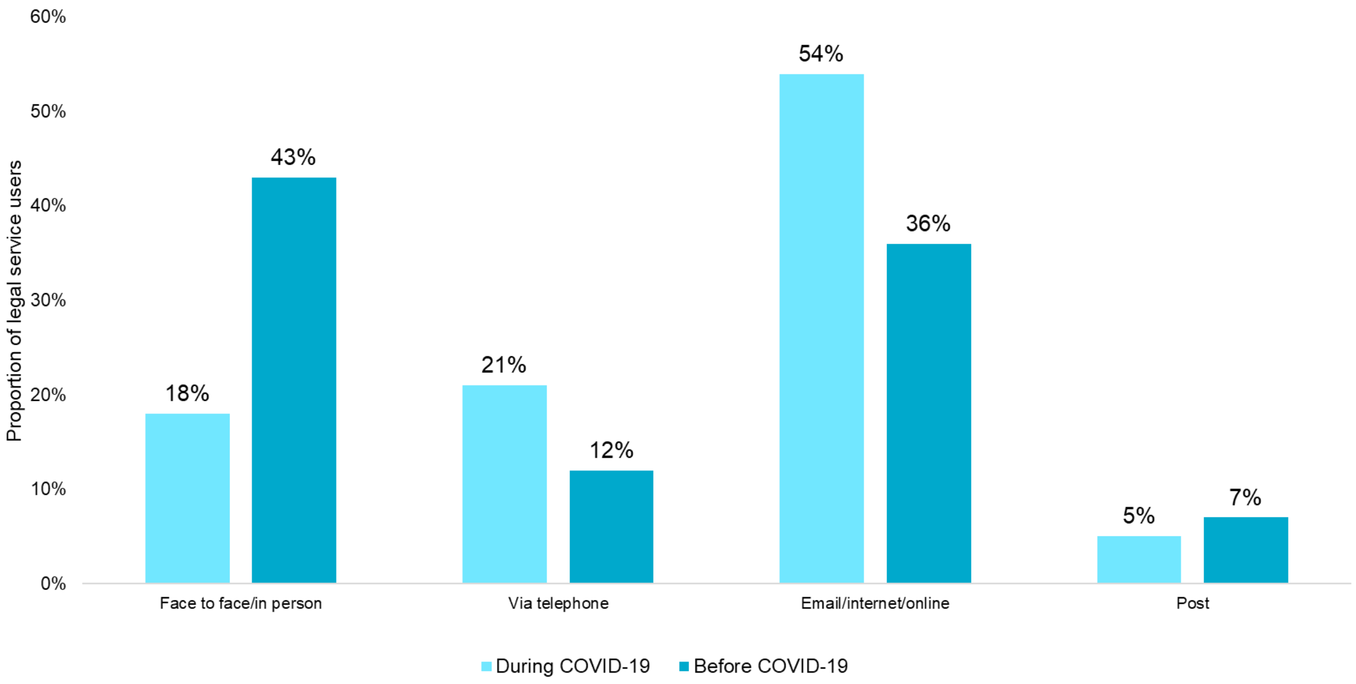


Base: All legal service users (2012=1435, 2013=1484, 2014=1060, 2015=1067, 2016=1523, 2017=1625, 2018=3535, 2019=3589, 2020=3623, 2021=3500)

Delivery methods differ by type of legal service. Conveyancing remains the area where online delivery is most common, rising to 69% in 2021. Face-to-face delivery was still most common for those accessing will writing (59%) or power of attorney (51%) services.

Even though legal services were increasingly delivered online, it is still the case that younger consumers are more likely to access services online and older consumers rely more on face-to-face contact. Of those aged 25-34 years old 55% accessed their service online in comparison to 36% of those aged 55+.

Figure 8. How legal services are delivered – COVID-19 analysis



Base: All legal service users who used a service during (n=1413) and before (n=2050) the COVID-19 pandemic

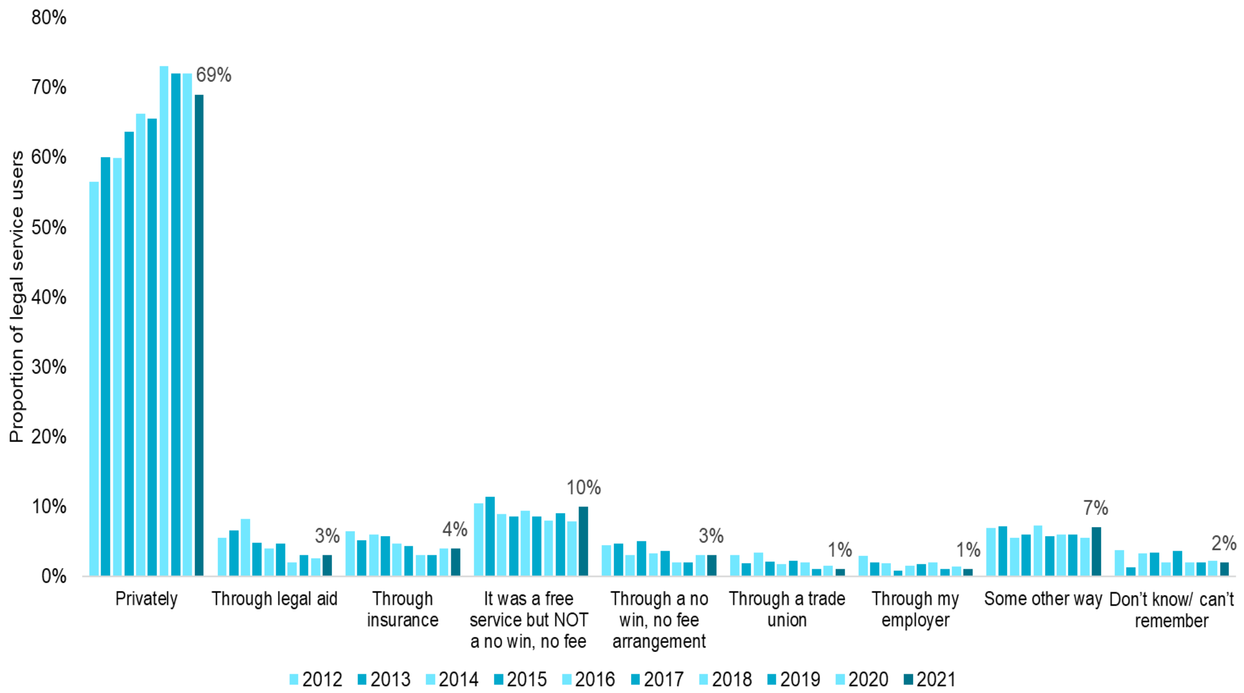
Funding of legal services

Funding for legal services has remained consistent broadly with 2019 *(see Figure 9)*. Private funding is relied upon by the most consumers, with 69% saying that they paid for the services themselves or with the help of family or friends.

In 2021, 3% of consumers funded their use of a legal service through legal aid. This is down from a high of 8% of consumers who accessed legal aid in 2014 and reflects the reduction in provision.

Those from higher social grades (ABC1) are more likely than those from lower social grades (C2DE) to privately fund their legal services (72% compared with 58%). Those from C2DE social grades are slightly more likely than those from ABC1 social grades to use a free service (12% compared with 9%) or seek legal aid (7% compared with 2%).

Figure 9. 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, 2018=3535, 2019=3589, 2020=3623, 2021=3500)

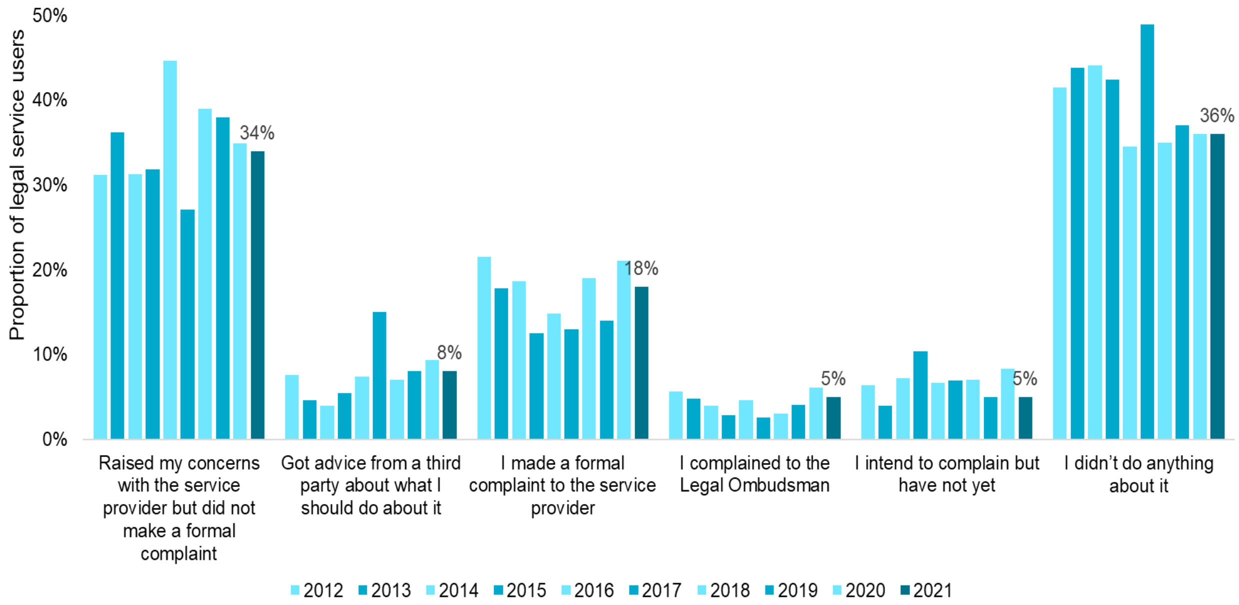
Similarly, White British consumers are more likely than BAME consumers to fund their legal services privately (71% compared with 59%), whereas BAME consumers are more likely to use a free service (13% compared with 9%) or through legal aid (7% compared with 3%).

Complaints behaviour

Consumers' reactions to being dissatisfied with a service they received have remained unchanged since 2020 (see *Figure 10*). Most commonly consumers either do nothing about it (36%) or raise their concerns with the service provider, but do not go as far as making a formal complaint (34%).

Just over half (56%) knew how to go about making a complaint about the service they received. This is the same level as last year but slightly higher than the 48% of consumers who reported in 2012.

Figure 10. Legal service consumer's response to being dissatisfied – time series analysis



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)

Unbundling

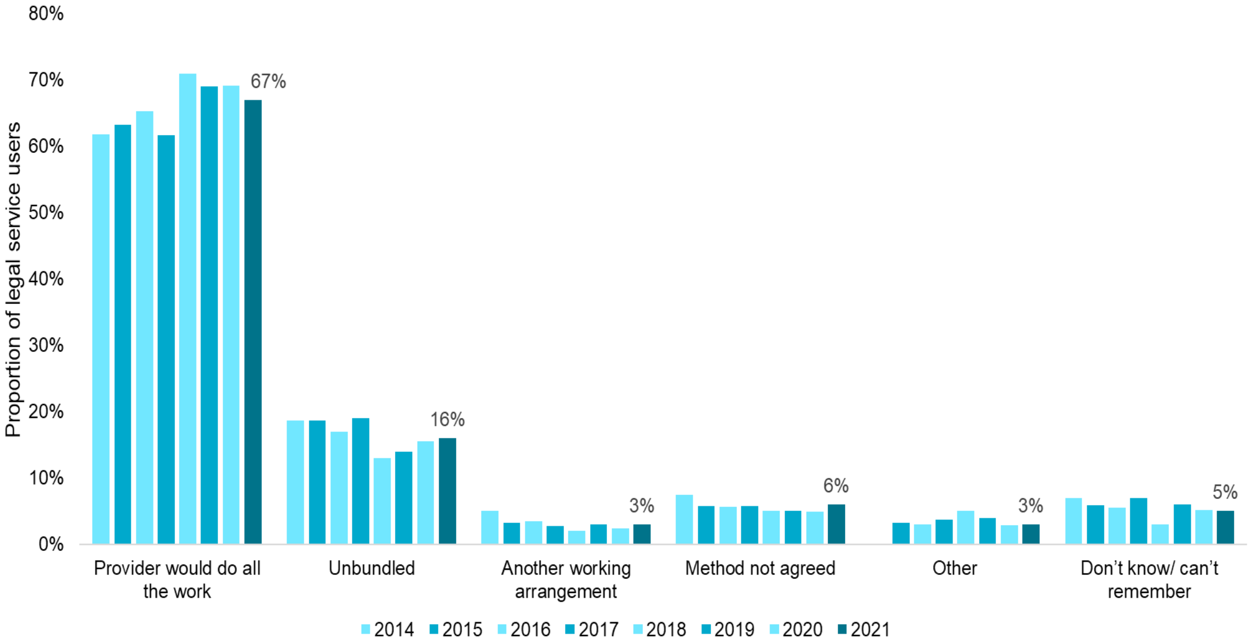
Unbundling is when a package of legal services is separated into tasks between the consumer and legal service provider. The two parties agree which tasks the provider will deliver, and those the consumer will undertake. Offering this service to consumers can, in some cases, help them reduce costs and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

In 2014, we started to measure the extent of this task sharing. There has been no significant change in the use of unbundling since last year reported by 16% of consumers, the same as in 2020 and slightly lower than the 19% seen in 2014 (*see Figure 11*).

As seen previously, when considering demographics, those from BAME backgrounds are more likely than those from a White British background to unbundle (23% compared with 15%). The oldest age group (55+) are also least likely to have used unbundling and there were no differences by gender or social grade.

Consumers who used legal services during the COVID-19 pandemic were more likely than those who used a service before the pandemic to unbundle and carry out parts of the service themselves (19% vs. 14%).

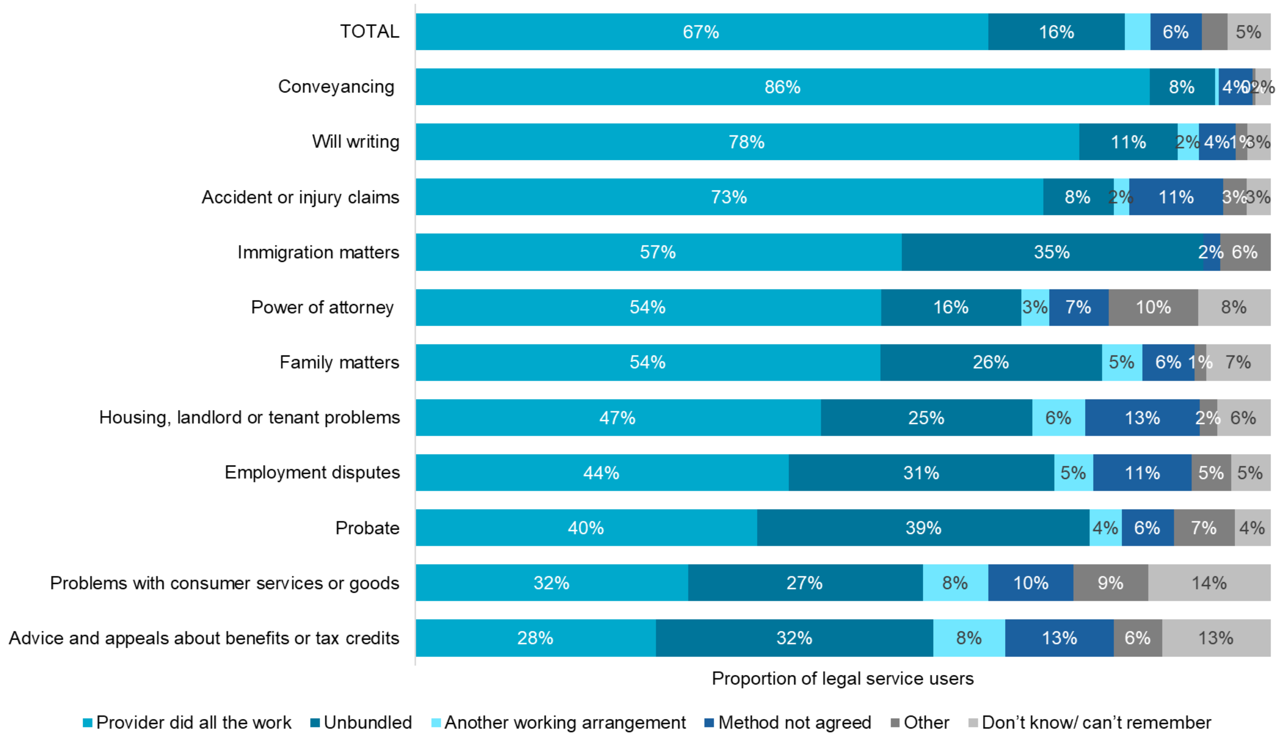
Figure 11. How it was agreed the service would be delivered before commissioning – time series analysis



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

Similar to 2020, those who used conveyancing (86%), will writing (78%) or accident or injury claims (73%) are most likely to have all of the work done by their provider (*see Figure 12)*.

Figure 12. Unbundling by type of legal service accessed



Base: All legal service users (2021=3500)

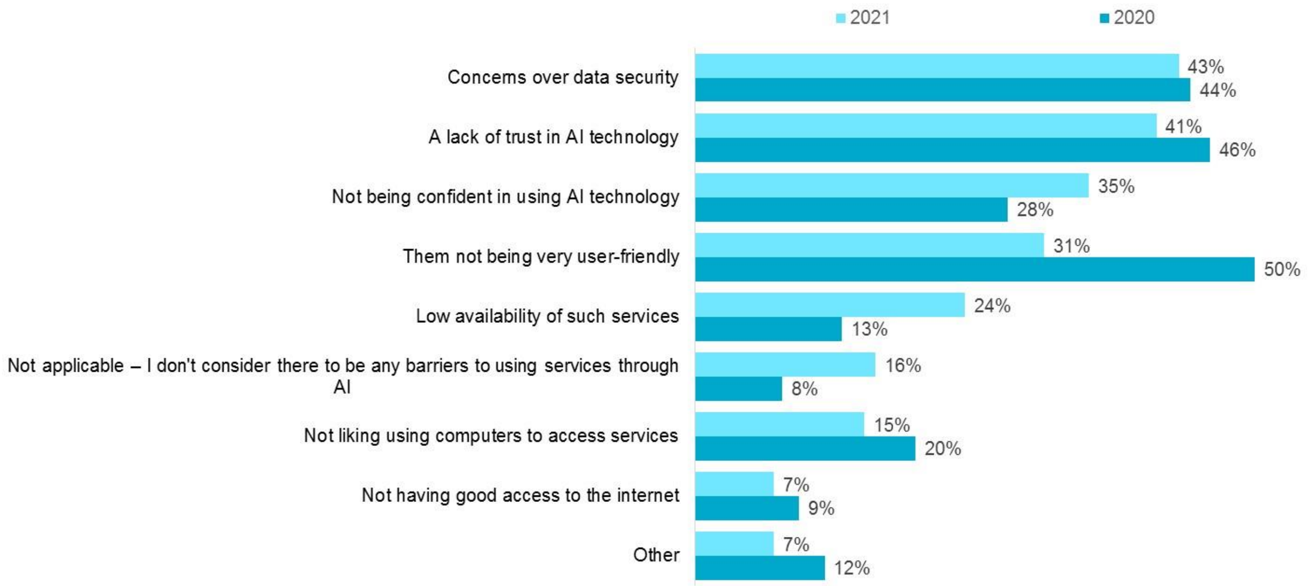
By contrast, 39% of consumers who used legal services for probate unbundled, higher than for other legal services. This is followed by immigration matters (35%) and employment disputes (31%).

Consumer views on new technology

'Artificial Intelligence' (AI) is a growing development in how services can be delivered to consumers. By AI, we mean using computer systems that gather and analyse data in ways that mimic human intelligence in order to make decisions or set out options. Examples of AI range from emerging 'chat-bots' to the routine use of interactive voice response (IVR) systems.

Perception of barriers to using services delivered by AI have changed over time. In 2021, there has been a decrease in the proportion of consumers saying they are not user-friendly (50% in 2020 to 31% in 2021). By contrast, consumers are now more likely to cite themselves not being confident using AI technology (35%) and its relatively low availability (24%) as a barrier to the use of AI.

Figure 13. Factors consumers consider to be barriers to personally using services delivered through AI



Base: All legal service users (2020=3623, 2021=3500)