



# Attitudes Towards Alternative Business Structures



Research Study Conducted for  
**Review of the Regulatory Framework for  
Legal Services in England and Wales**

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- Introduction
  - Objectives
  - Methodology
- Context
- New Business Structures
  - Legal Disciplinary Practices (LDPs)
  - Outside Investors
  - Multi-Disciplinary Practices (MDPs)
- Attracting New Entrants
- Conclusions

Two key research questions:

- Consumers understanding of the market for civil legal services
- What views do they have about any potential changes to the way legal services are delivered?

To do this we:

- Assess the current legal services market place from a consumer perspective
- Test reactions to alternative business structures; namely:
  - Ownership
  - Alternative business structures: LDPs and MDPs
  - Entry to the profession

# Methodology – Qualitative

- 12 focus groups, led by MORI moderator, conducted across the country
- Addressed the full range of research questions

Location	Past users	Past non-users	Potential users	Micro business users	Potential entrants	TOTAL
London				2	2	4
Bristol	2					2
Newcastle	1		1			2
Birmingham		1	1			2
Wrexham	2					2
TOTAL	5	1	2	2	2	12

- Fieldwork: 31st August – 30 September
- Used to explore complex, sensitive or unfamiliar issues, and probe reasons and motivations (therefore well suited to dealing with LDPs)
- Does not provide statistically valid data, but helps us answer the question ‘Why?’

# Methodology – Quantitative

- Quantitative survey only addressed usage and attitudes towards lawyers, access, MDPs, NB: it did not address LDPs
- Methodology details:
  - Number of respondents: 1,838 adults aged 16 and over in England and Wales
  - Interviews were conducted face-to-face as part of MORI's General Public Omnibus, in home using Computer Assisted Personal Interview (CAPI) technology
- Fieldwork: 23<sup>rd</sup> - 28<sup>th</sup> September
- Data weighted to reflect population profile of England and Wales
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't know or neutral categories
- Quantitative data provides us with statistically robust results. It answers questions such as:
  - How many? To what extent? Who? When?

## About the Focus Groups

- No major differences observed between micro business and general public groups, so not analysed separately
- Potential entrants did raise different concerns to the other groups and so are examined separately
- The public engaged well with this research in groups
  - Able to offer a range of varied and reasoned opinions
  - Often spontaneously mentioned issues relevant to the Review

## In this presentation

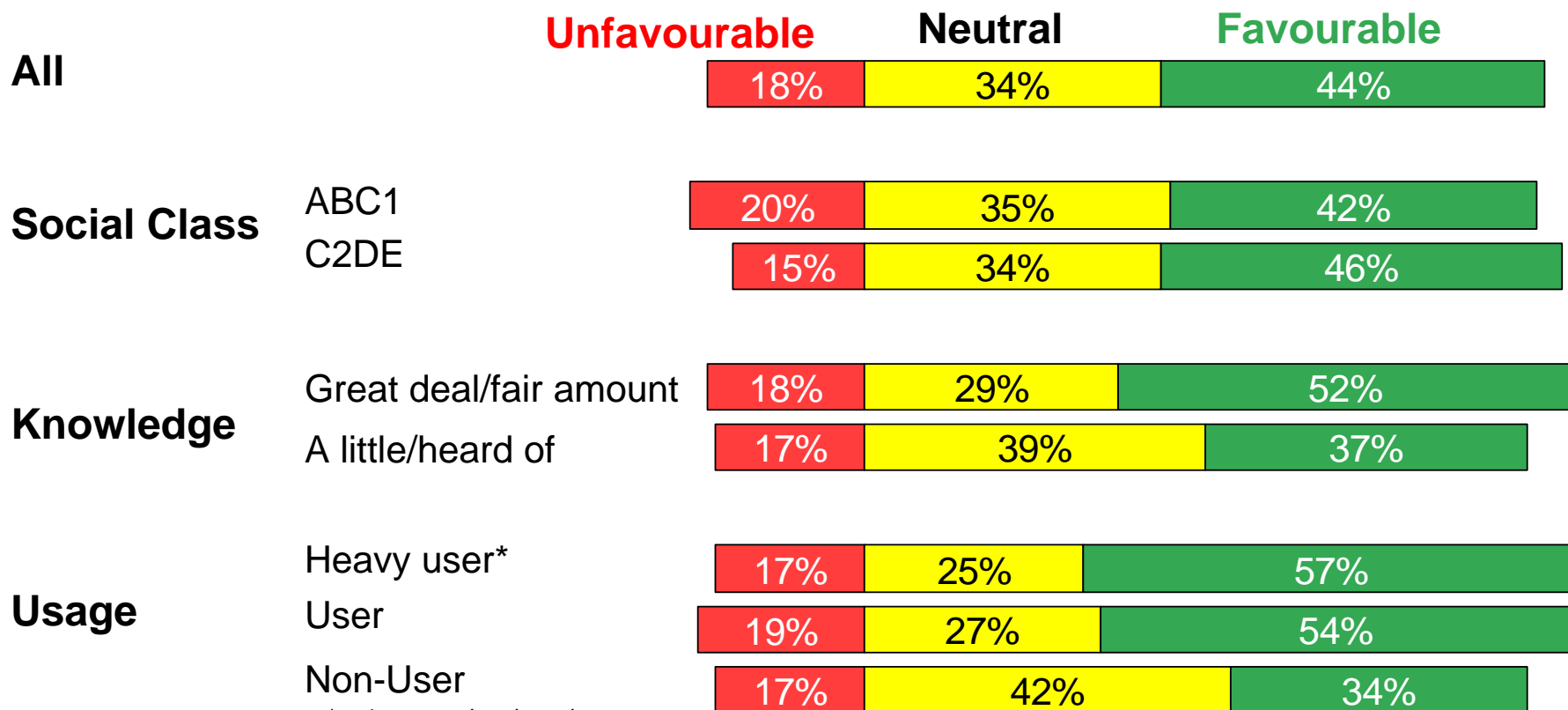
- Quantitative data is referred to by charts and % figures
- Focus groups data is referred to by verbatim quotation of participants

**Context:  
The Current Picture**

# Perceptions of Lawyers

- Beginning with a top-level view from the survey....
- On balance, a positive view of lawyers, more so among the better informed and users

Q *And thinking in general terms, and taking all things into consideration, how favourable or unfavourable is your opinion of lawyers?*

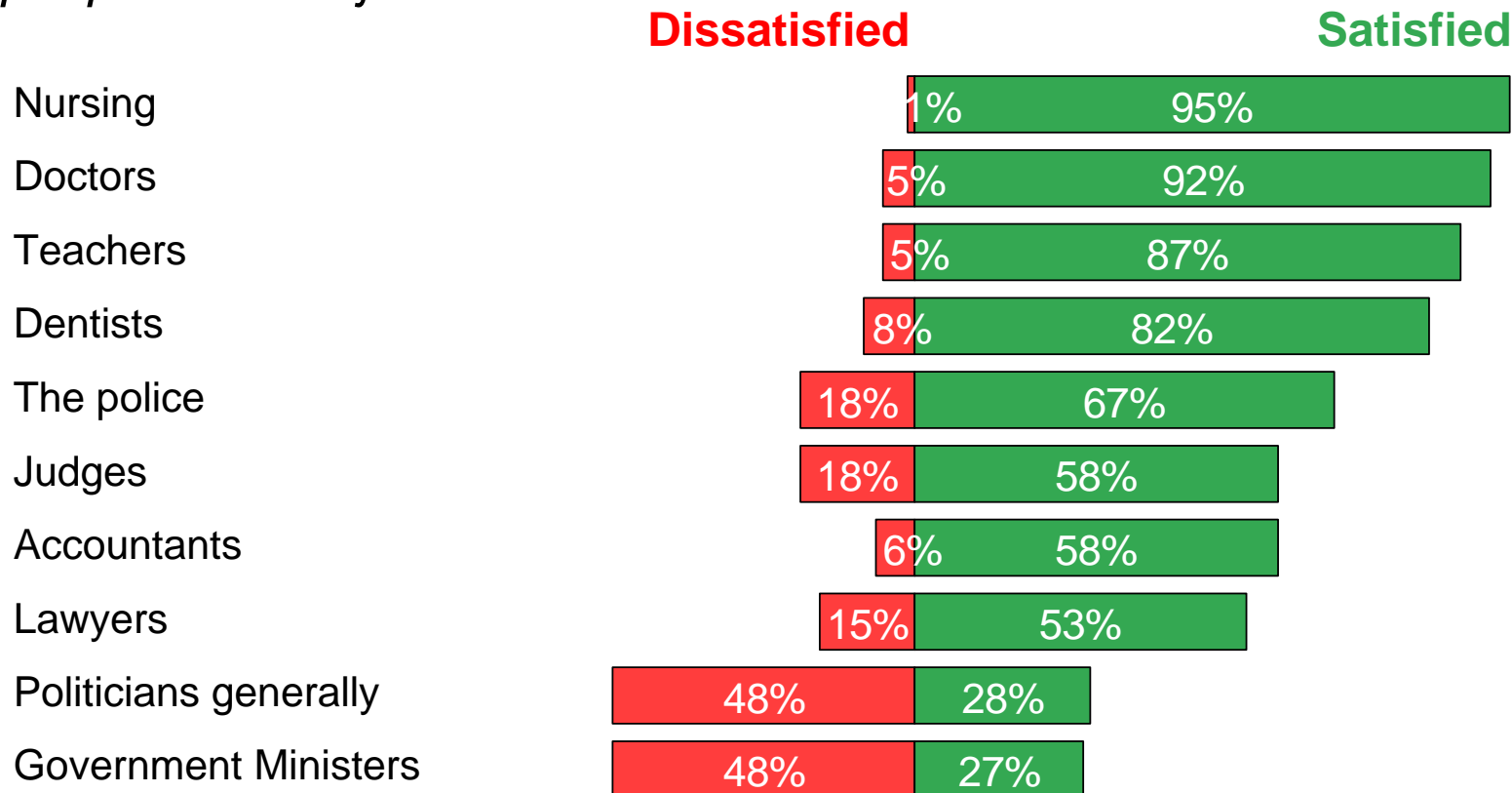


\* = 4 or more legal services

# Perceptions of Lawyers vs. Other Professions

- But not well regarded in comparison to other professions

Q *How satisfied or dissatisfied are you with the way the following types of people do their jobs?*



# Perceptions of Lawyers – Drivers (1)

## ■ Lawyers seen as:

### – Expensive

*They charge ridiculous amounts of money... There's no fee, no win but we'll take 97% of whatever you get in the judgement.*

*Male, Birmingham, Non User*

### – Generalists claiming to be specialists

*There's the two types, there are specialist, criminal lawyers are specialist, conveyancing and financial lawyers, corporate lawyers that specialise, but then you've also got your generalist, your high street guys that pretend to specialise in everything and don't... They specialise in whatever you walk through the door with all of a sudden.*

*Male, Birmingham, Non User*

### – Intimidating

*I put scary, they're really intimidating.*

*Female, Wrexham, Past User*

### -- Difficult to understand

*The language they use... in letters some of them still write as if its 50 years ago and they're in a kind of time warp.*

*Female, Bristol Past User*

### -- Mysterious and lacking transparency

*They are a bit prehistoric... it's a system full of tradition and shrouded in mystery and [lawyers] seem to people to be aloof, that why there's no trust there.*

*Female, London, Potential Entrant*

### -- Generally negative

*They are a necessary evil aren't they?*

*Male, Wrexham, Past User*

# Perceptions of Lawyers – Drivers (2)

## –Lacking in customer focus

*I like to be able to pick up a phone and find out something fairly quickly, but normally it's a process of trying to set up appointments and it's too long winded really*

*Male, London, Business User*

*They come over as being very officious and not user friendly*

*Male, London, Business User*

*There's almost like a big contradiction between them being experts on the one hand and you having to do lots on the other.*

*Male, Bristol, Past User*

*I found it hard to get hold of them when you phone them, you constantly leave messages and they don't get back to you and they often leave you in the dark as well, I felt I needed to go in there to find out or find out if there was any developments in my case and so on.*

*Female, Bristol, Past User*

*They like to have a mysterious air about it, to make you feel you can't do it for yourself...*

*Female, Bristol, Past User*

*I've had experience of solicitors when you're just a case number, and when you're sitting opposite them on a desk and your life's in turmoil and you're just treated like a number.*

*Female, Wrexham, Past User*

# Perceptions of Lawyers – Drivers (3)

- In line with quantitative findings, when things went well, participants felt it was because:

- Communications were regular

*I am looked after by an independent [lawyer], I speak to him pretty much every day, it's not like he charges me for it, he's a friend and he's invaluable to my business.*  
Male, London, Business User

- Promises were delivered

*They've all been very keen to get involved, I've not had to shop around at all and they've always delivered.*

Male, London, Business User

- Indeed, there were people who were positive without caveats.

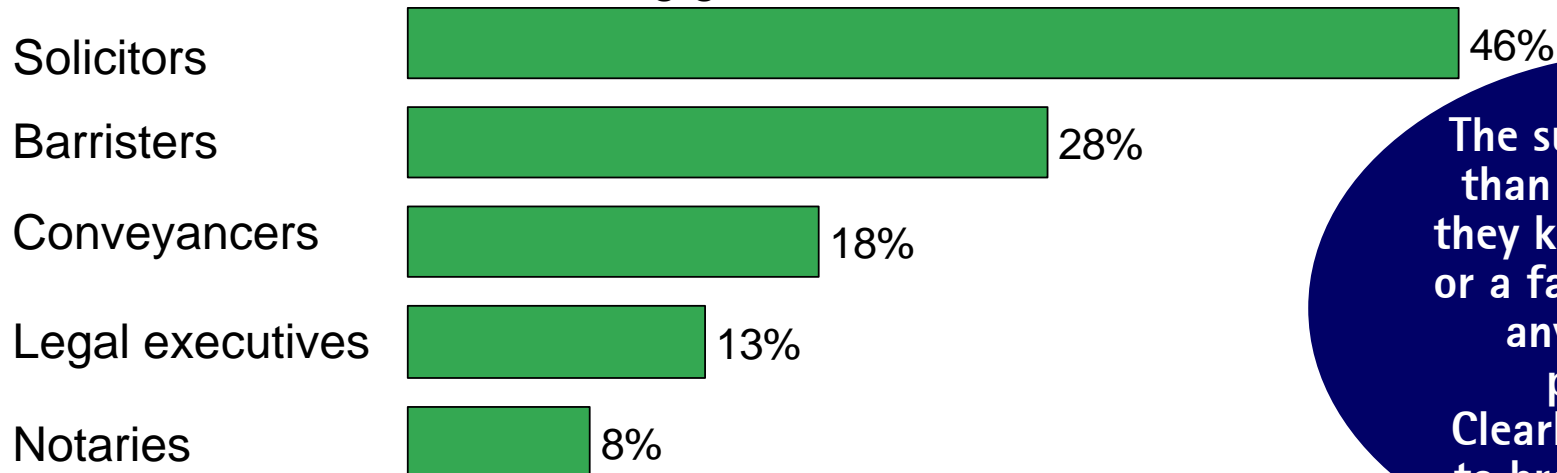
*I always feel confident with the advice from a solicitor.*

Female, Wrexham, Past User

# Understanding of Legal Professions

Q How much, if anything, do you know about the following types of lawyers, for example the work they do or the services they provide?

% knowing great deal/fair amount



The survey shows less than half (49%) say they know a great deal or a fair amount about any of the legal professions. Clearly there is scope to broaden / improve understanding

The groups revealed some confusion about the roles of different types of legal professional

*The solicitors do all the leg work don't they? The barristers are the ones that are fighting your corner and you meet them just before you go into court.*  
Female, Wrexham, Past User

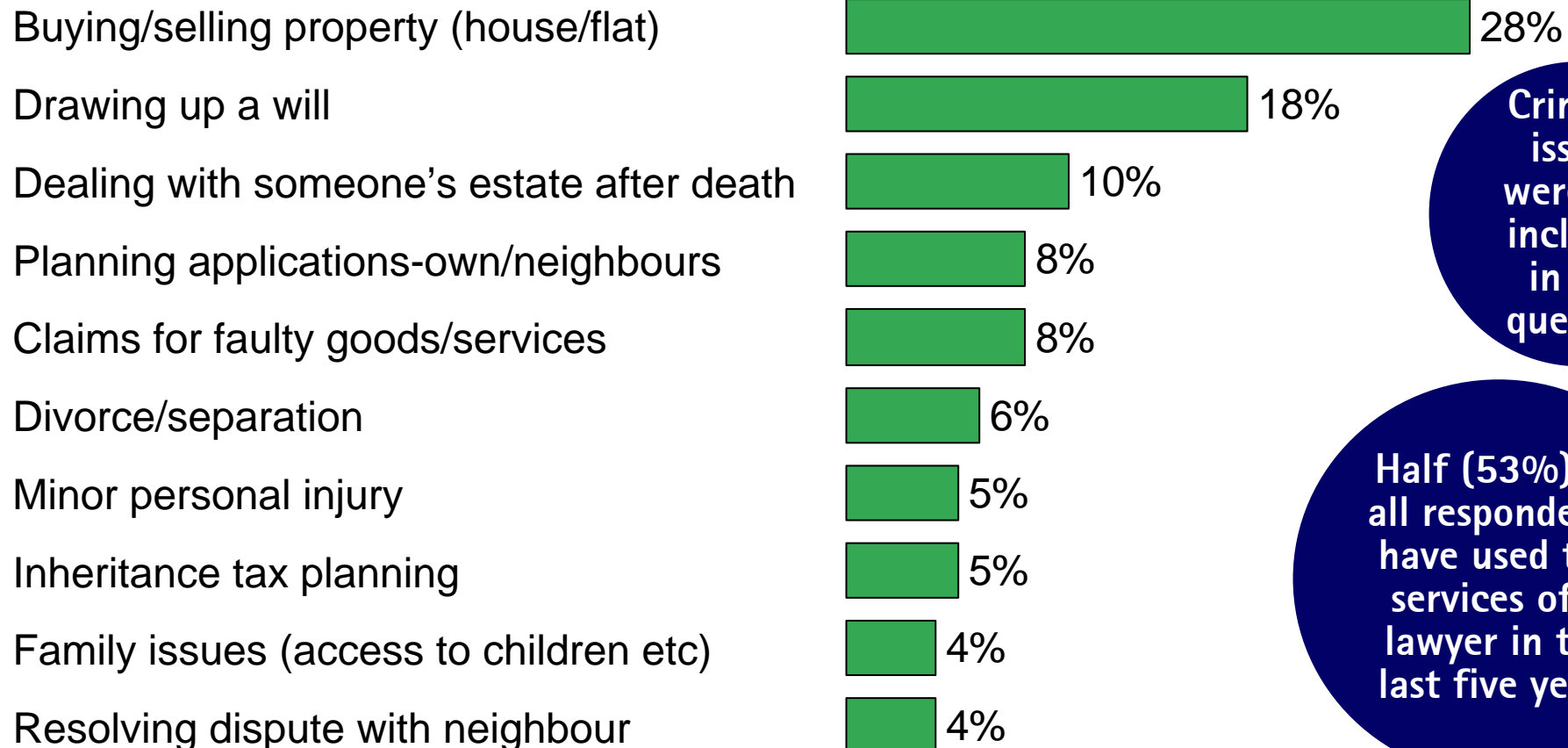
*Barristers, well they're less qualified than solicitors aren't they?*  
Male, Birmingham  
Potential User

*[A legal executive is] a secretary that's moved herself up a bit more... [but] isn't taking more exams.*  
Female, Wrexham,  
Past User

# Prevalence of Legal Problems

Q *Have you had to deal with any of the following issues in the last five years?*

## Top 10 'legal scenarios'

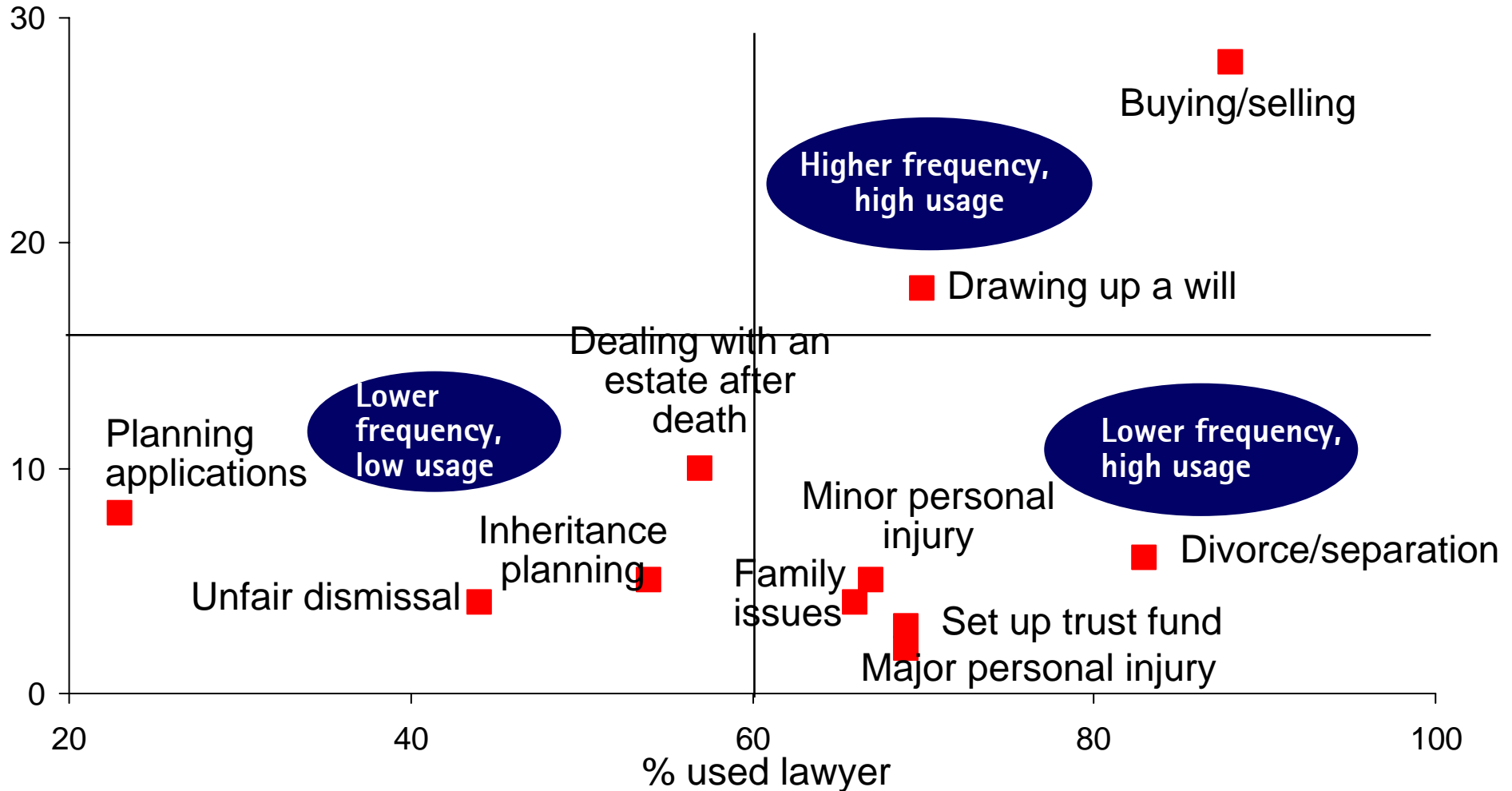


Criminal issues were not included in the question

Half (53%) of all respondents have used the services of a lawyer in the last five years

# Legal 'Intensity' of Top 10 Scenarios

% experienced scenario



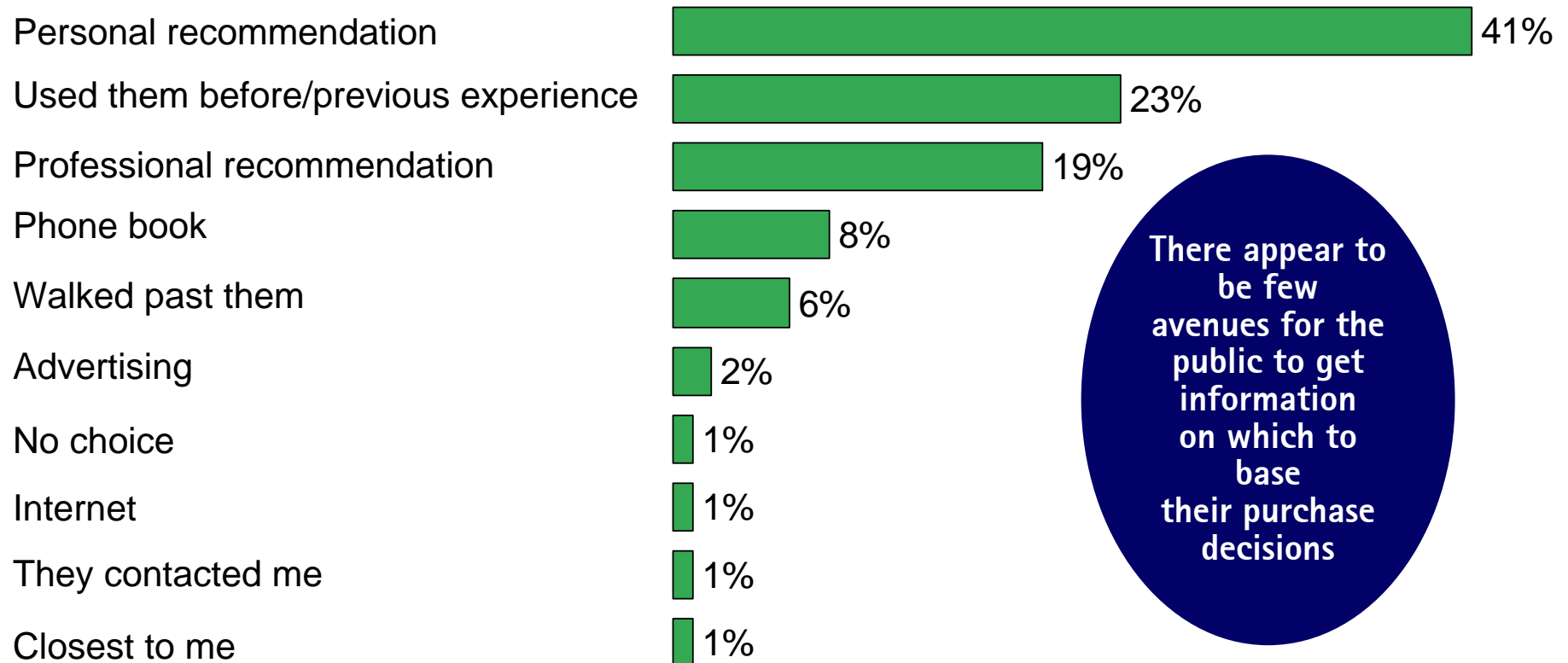
Experience: Base: All respondents in England and Wales aged 16+ (1,838)

Usage: Base: Those who have experienced a legal problem in the last five years

# Finding Legal Professionals

- Recommendation is key, but note low usage of advertising and internet

Q *How did you choose the most recent lawyer you sought or received advice from?*



Base: All using lawyer in last five years (961)

# Important Factors when Buying Legal Services

Q: To what extent do you agree or disagree with the following statements...?

**Disagree** **Agree**

*... It would be important to me to get legal advice at the lowest possible price, even if that meant less personal contact with a lawyer*



*...I would prefer to have personal meetings with a lawyer rather than rely on letters, telephone calls and faxes even if it were more expensive*



• Note that some respondents want both!  
• Our question did not test whether this changed by type of legal service

The quality of personal relationships appears to be most important, as comments from the groups illustrate:

*If you deal with one solicitor then it should be consistent and you should always see the same one.*

*Female, Wrexham, Past User*

*I went to three solicitors and plumped for the one that I felt I had a rapport with.*

*Female, Bristol, Past user*

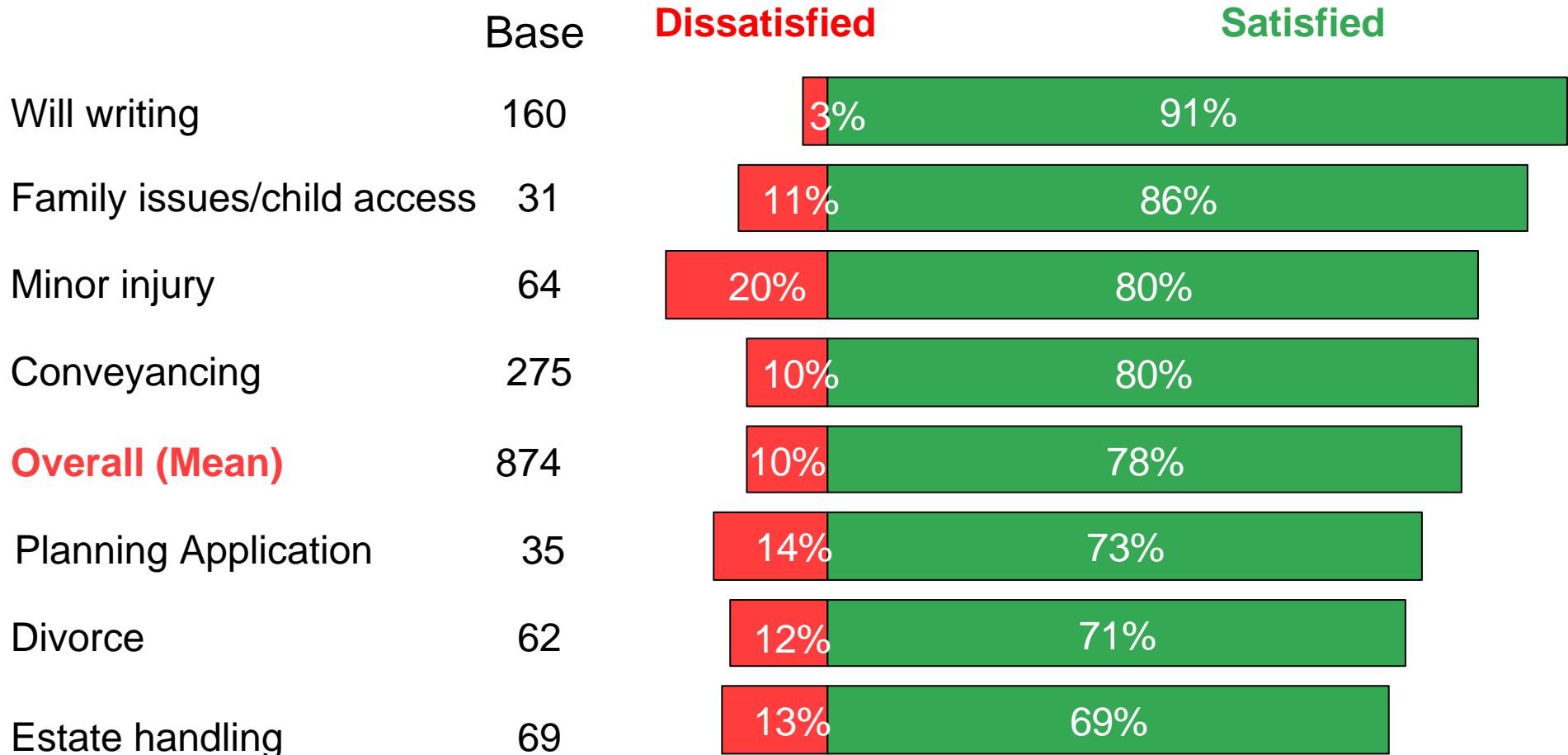
*I think the attitude will be crucial, because if his attitude stinks, I'll be out the door.*

*Female, Birmingham, Non-User*

Note that original group perceptions are that lawyers are not good at relationships

# Satisfaction with Different Legal Services

Q *Thinking about the legal help you received about... how satisfied or dissatisfied were you with the overall quality of the service you experienced?*



Base: All who have experienced a legal issue over the last 5 years and used a lawyer (874)

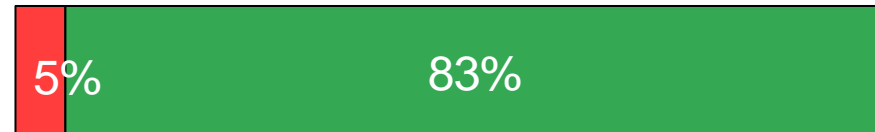
# Satisfaction Legal Services – Context

Q Thinking about the legal help you received about . . . . how satisfied or dissatisfied were you with the overall quality of the service you experienced?\*

Q I am going to read out a number of different types of services. I would like you to tell me how satisfied or dissatisfied are you with the quality of each?

**Dissatisfied** **Satisfied**

Local supermarket



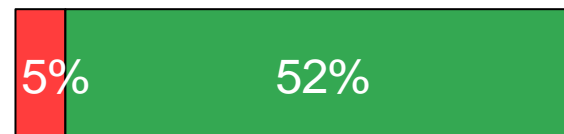
**Lawyers\***



High Street Bank/Building Society



Local garage



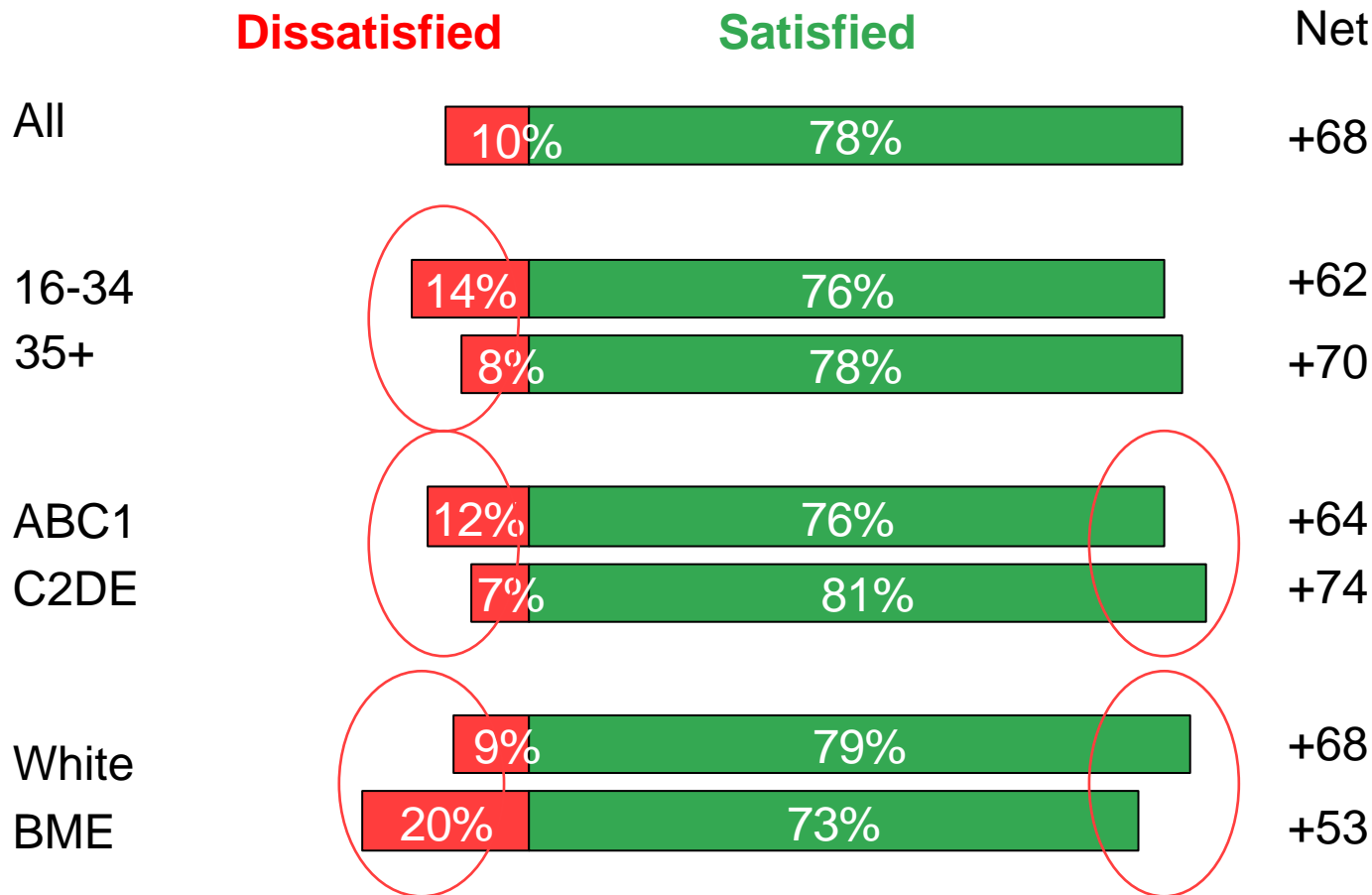
Local council



\*Base: All who have experienced a legal issue over the last 5 years and used a lawyer (874)

# Satisfaction with Legal Services – Demographic Differences

Q Thinking about the legal help you received how satisfied or dissatisfied were you with the overall quality of the service you experienced?



Younger, middle class, and (especially) Black & Minority Ethnic groups have larger proportion of dissatisfieds

Base: All who have experienced a legal issue over the last 5 years and used a lawyer (874)

- Knowledge of ownership structures is low
- People often familiar with the term partnership - but less clear on implications

*[I have] never really thought about it [ownership]... If they have a partner, each solicitor has a different area to cover don't they? So one would deal with money, the other one would deal with divorce and they all deal with property.*

*Female, Birmingham, Potential User*

*I think when you first consider going in to it [law] you don't really have a clue how it works, so you don't really think I'll do a law degree and I might become a partner. It's not until you start looking into it properly that you realise how it works.*

*Male, London, Potential Entrant*

*It's [partnership structure] just something you don't know about...It's something you don't use a lot of, it's not like you go to the supermarket every day, once a week, it's very rare you go to these people.*

*Female, Birmingham, Potential User*

- Therefore, not surprising that being seen by a partner is not a priority

*If you go to a dentist you don't expect to see a senior partner or see a partner necessarily, if somebody's there that's able and can do the job...*

*Female, Bristol, Past User*