

Legal Services Consumer Panel Tracker Survey 2025:

How consumers are choosing legal services



June 2025

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Two-fifths of consumers are shopping around

Base- 3750

44% in 2025

+3 vs. 41% in 2024
+6 vs. 39% in 2023
+1 vs. 43% in 2022
+14 vs. 30% in 2021



Most likely to shop around when using legal services for:

Base- 3750

54% Family matters (+3 vs. 51% 2024)

53% Housing problems as a tenant



Least likely to shop around when using legal services for:

22% Criminal charges

33% Power of attorney



Most consumers felt they had a choice, and that the price was easy to understand:

Base- 3750

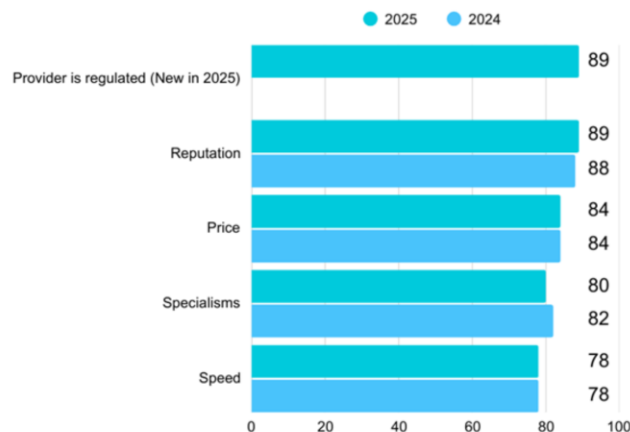
84% agreed that they had a choice of providers (+2 vs. 82% 2024)

77% agreed that information on price was easy to understand (-1 vs. 78% 2024)



Top 5 factors considered in choice

Base- 3750



Executive summary

Shopping Around

- Shopping around has increased to its highest level this year, with over two in five (44%) of consumers doing so. This continues an upward trend since 2023.
- Shopping around is higher for more complex legal needs, such as family matters (54%) and housing problems as a tenant (53%). Shopping around is lower for legal services to deal with criminal charges (22%), patents (31%) or a power of attorney (33%).
- This year, consumers are finding it easier to find information on costs, if they could complain to an ombudsman, how long the service would take, and professional indemnity insurance cover. This continues a previous trend, with the proportion of consumers stating that it is easy to find information on these areas increasing since 2018.

Finding Information

- Price continues to be the main aspect considered when comparing providers (56%), along with reputation (48%) and location (31%).
- Independent verification of the quality of service (27%) and access to an ombudsman (15%) have increased in importance this year.

Provider Choice

- Over eight in ten consumers (84%) felt they had a choice of provider in 2025. This increased from 2022 onwards, and is now at the highest level since 2012.
- Previous experiences and recommendations are the main drivers of provider choice. Yet the majority (57%) of consumers who received a recommendation still looked for additional information about the provider prior to contacting them.
- For the first time, the 2025 survey included provider regulation as a possible factor impacting decision-making. This emerged as the most important factor (89%) this year that consumers would consider if they could shop around, with reputation and price also remaining important.

Note on the methodology

Context

The Legal Services Consumer Panel commissioned M·E·L Research to conduct an annual tracker survey and research among those who have used legal services in the last two years. This year we talked to 3,750 legal services users. Respondents were sourced via an online panel, with quotas set to generate representative results. The survey was live from Thursday, 20 February to Monday, 7 April 2025. Specifically, the survey was designed to:

- Gain an understanding of consumers' understanding and experience of using legal services in England and Wales;
- Assess what type of individuals are using legal services, the reason for their use, their satisfaction with the service and their understanding of the profession.

Statistical significance

The findings throughout the report are presented in the form of percentages, and all differences between subgroups highlighted in the text are statistically significant at a 95% confidence level 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 they indicate a failure to detect differences due to sampling variation.

Reporting conventions

The 'base' or 'n' number referred to in each chart and table is the number of individuals responding to the question. An asterisk (*) denotes small base sizes (<30) and findings should therefore be considered as indicative only. Due to computer rounding, numbers and percentages displayed visually on graphs in the report may not always add up to 100% and may differ slightly when compared to the text. The figures reported in the text will be correct.

Please note: the findings in the report may not appear in the same order as the survey questions.

Sample

The sample is broadly comparable with 2024 and previous years by location, age and gender. The sample was weighted to the type of legal service used in the past two years, and the resulting impact of having fewer (-5) respondents from ethnic minorities was checked to ensure this was not influencing the results. After reviewing these results, it was decided to not include ethnicity in the weighting as there was little impact on the results.

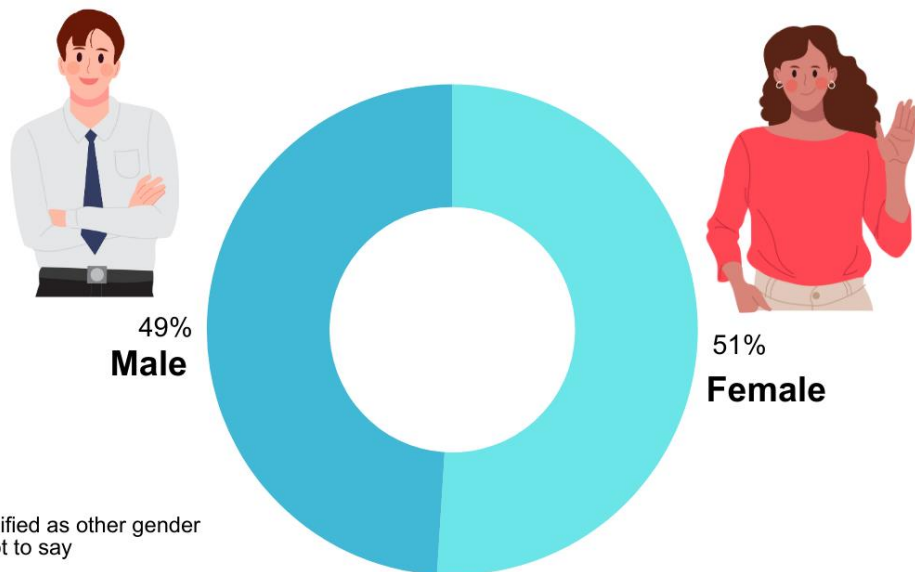
The 2025 survey includes a boost of 500 respondents in Wales (as opposed to 250 in previous years), to enable robust analysis of legal services users within Wales. When conducting analysis among the overall sample, we have down weighted the proportion of respondents in Wales to match previous waves to ensure comparability of data.

M·E·L Research has conducted the survey from 2022 onwards. Prior to this, between 2012 and 2021, the survey was conducted by YouGov. Comparisons between results in different years are made in the report, and whilst there were some methodological changes introduced in 2022 as a result of the change of research services provider, the sample is broadly comparable with previous years, subject to the differences noted in the samples for each year.

Who did we speak to?

Gender

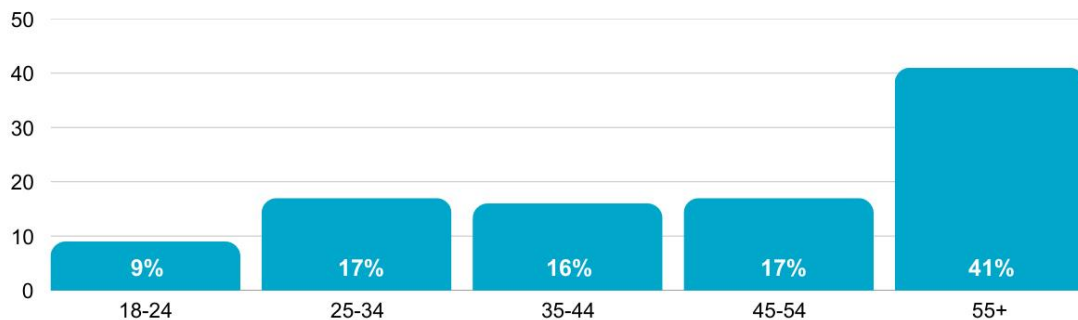
Base- 3750



4 respondents identified as other gender
1 selected prefer not to say

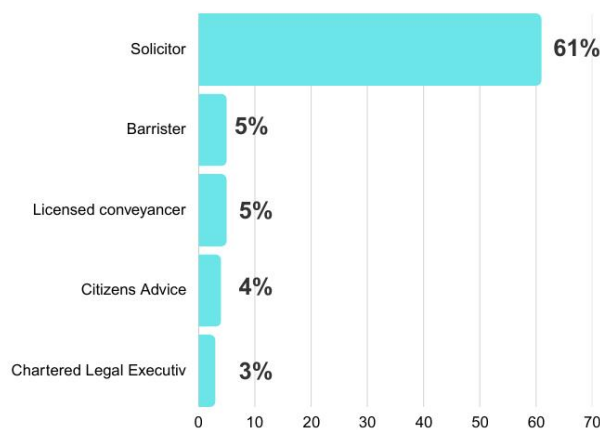
Age

Base- 3750



Top 5 providers used

Base- 3750



Regulated business?

Base- 3750

Most are using a regulated legal business

90%

Said their provider was regulated

Satisfaction with service

Base- 3750



are satisfied with their service

Paid themselves/friends/family

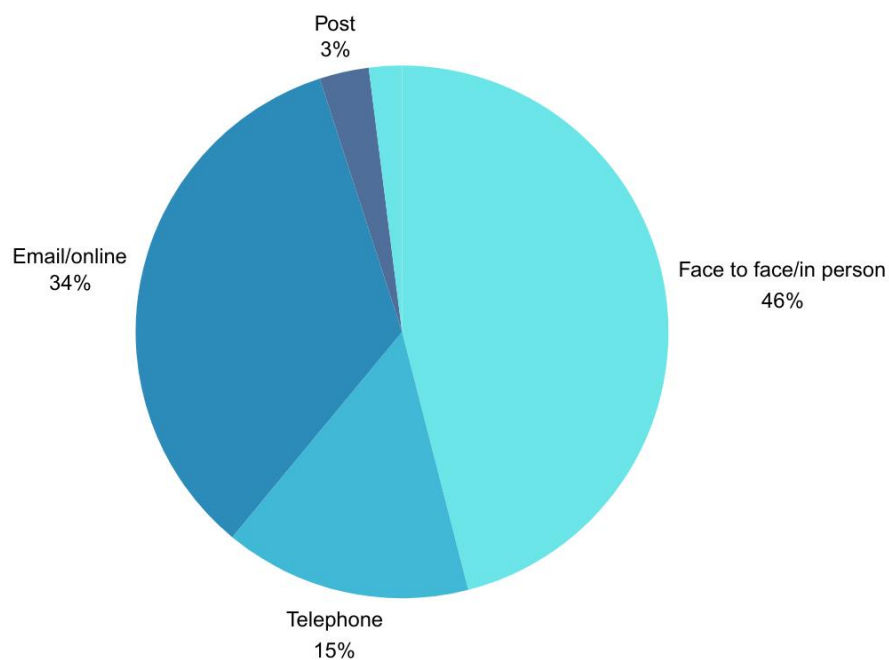
Base- 3750



How the service was mainly delivered

Base- 3750

Face to face was the most popular mode of delivery

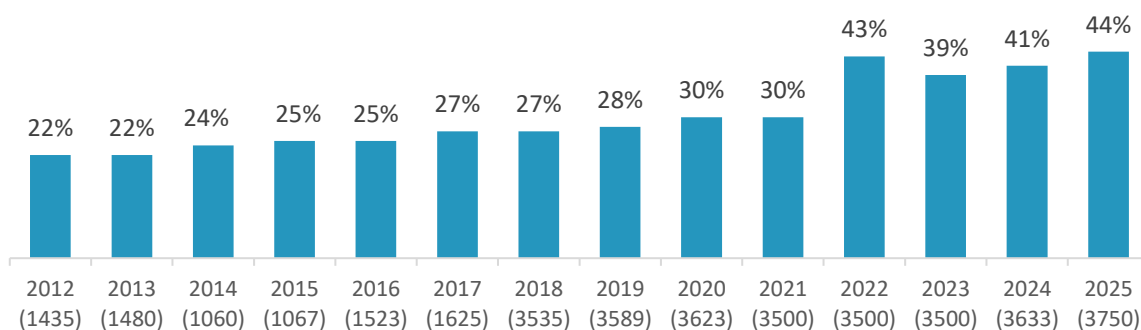


How consumers are choosing legal services

Who shops around?

The proportion of consumers who shopped around before choosing a legal services provider has increased in the last year (see *Figure 1* - 41% in 2024, 44% in 2025), and is now at its highest level.

Figure 1. Did you shop around for the provider you chose?* (Base size in brackets, by year. Showing those who shopped around.)



*Question wording was changed from 2023 onwards, so data from previous years is not directly comparable.

Shopping around is higher among:

- Males (46% vs. 43% of Females);
- Those in London (60% vs. 44% overall);
- Those in social grades ABC1 (50% vs. 40% of C2DE);
- Those aged 25 to 34 (61% vs. 44% overall);
- Those from minority ethnic communities (57% vs. 38% of those from White communities);
- Legal aid users (61% vs. 44% overall).

Unsurprisingly, shopping around is higher for more complex legal needs, such as family matters (54%) and housing problems as a tenant (53%). Shopping around is lower for legal services to deal with criminal charges (22%), patents (31%) or a power of attorney (33%). Those who took longer to choose include:

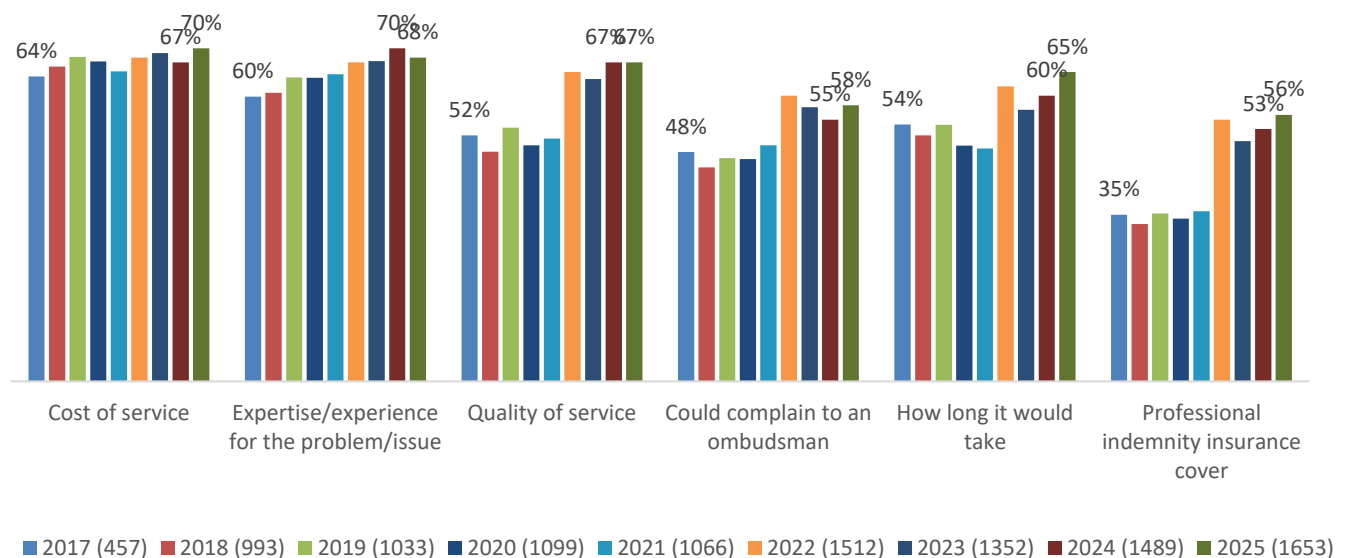
- Those from minority ethnic communities (16% vs, 8% of those from White backgrounds);
- Residents of London (15% vs. 10% overall);
- Those using complex services, such as copyrights, patents and family matters.

Ease of finding information when shopping around

This year, consumers have found it easier to find information on costs, whether they could complain to an ombudsman, how long the service would take, and details of professional indemnity cover (see *Figure 2*). Other areas have remained fairly stable, with information on expertise and costs seen as most easy to find.

Those from minority ethnic communities found it more difficult to find information across most aspects of the service when shopping around.

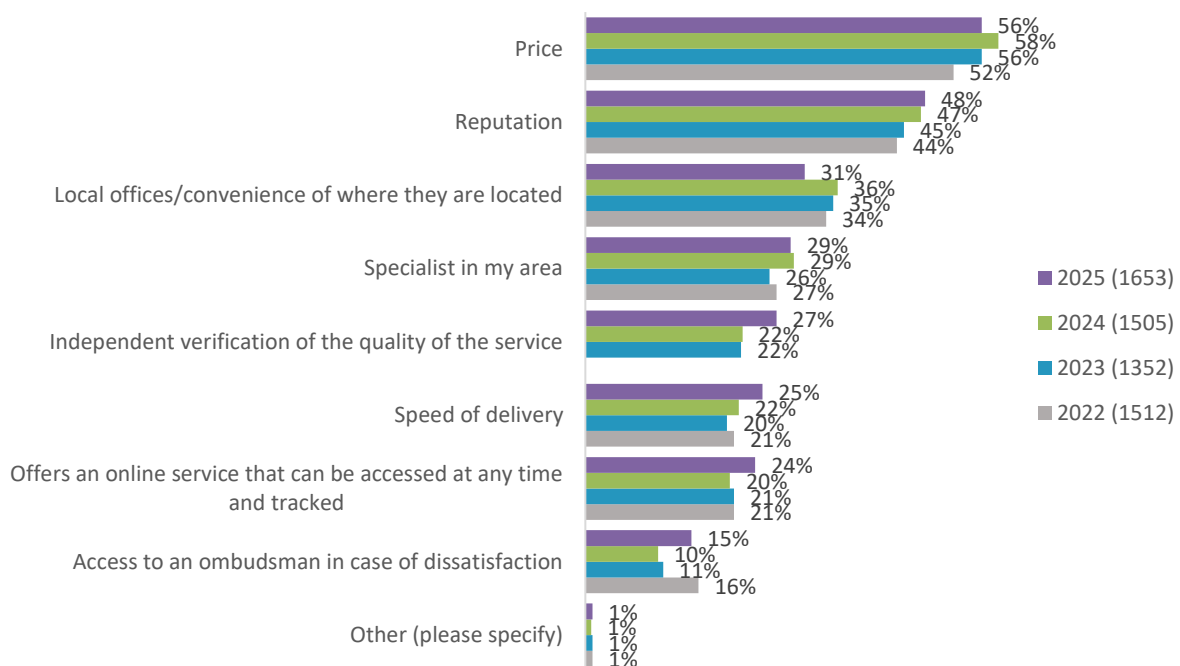
Figure 2. When shopping around for a legal services provider, how easy or difficult was it to find the information you wanted on each of the following? (Respondents who shopped around. Base size in brackets, by year. Showing those who found it easy).



What did consumers compare before choosing their service?

The price (56%) of the service was the main aspect that people compared when shopping around, with reputation (48%) and the location of an office (31%) also important factors; all of these were in line with scores seen in recent years (see *Figure 3*). The proportion of consumers comparing independent verification of the quality of service (27%) and access to an ombudsman (15%) have increased this year.

Figure 3. Which of the following did you compare before choosing your service? (1352)



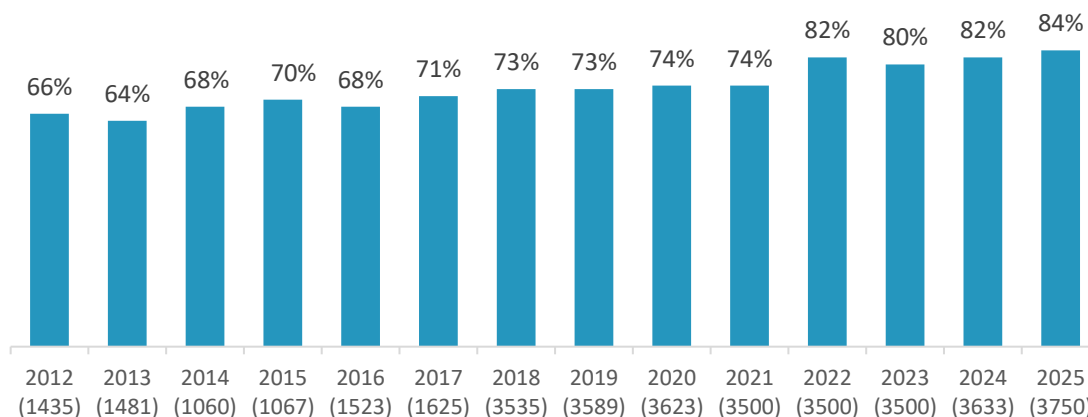
Key subgroup differences include:

- Males were more likely to compare speed and access to specialists than females;
- Over 55s were more likely than other age groups to compare price and office locations, whereas younger consumers focused more on speed and online service;
- Those from White backgrounds were more focused on local offices, whereas those from minority ethnic communities were concerned with speed and access to an ombudsman;
- Pricing is more likely to be compared for conveyancing and will writing. Speed is a priority in family matters, whereas access to an ombudsman becomes more important in problems with consumer goods and services.

How much choice do people think they have?

Over eight in ten consumers (84%) felt that they had a choice, a slight increase on 2024 (82%), and remaining well ahead of levels seen between 2012 and 2021 (see *Figure 4*). Unsurprisingly, those that shopped around were more likely to feel that they had a choice (88%), in line with previous years. Those who were satisfied with the outcome of their legal matter were also more likely to feel that they had a choice than the overall sample (88%), suggesting a correlation between overall satisfaction and satisfaction with other areas of the experience.

Figure 4. How much choice did you feel you had? (Base size in brackets, by year. Showing those who felt they had a choice.)



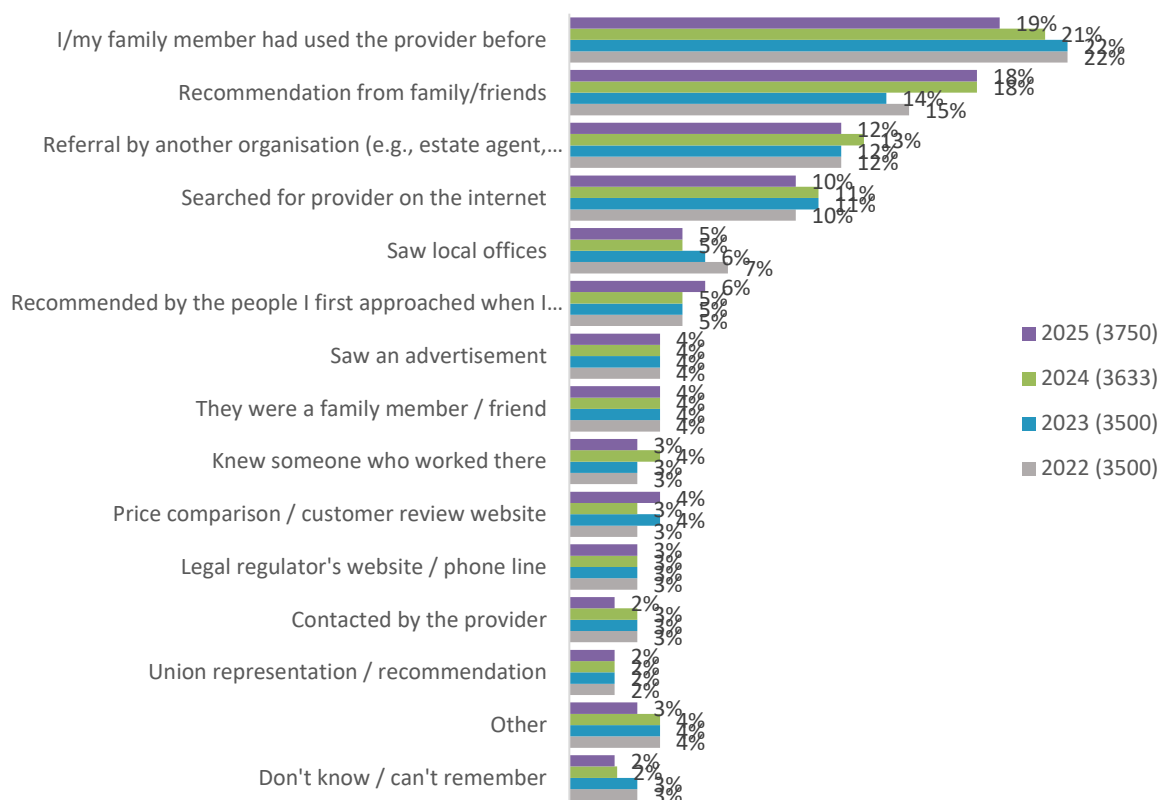
There were subgroup differences in those who felt that they had a choice:

- Those paying for it themselves (86%) vs. those using insurance (80%) or a no win, no fee arrangement (79%);
- Those in social grades ABC1 (85%) vs. C2DE (81%);
- Consumers in Wales were less likely to feel that they had a choice (77% vs. 84% overall).

How do people choose their provider?

When asked how consumers choose their provider, influence from family members and friends (they or a family member have used the provider before - 19% or family or friends recommended the provider - 18%) remained the most common factors, consistent with previous years (see *Figure 5*, overleaf).

Figure 5. Which one of the following best describes how you chose your provider? (Base size in brackets, by year.)



Key subgroup differences in factors influencing provider choice were:

- Females were more likely than males to use providers previously used by themselves/ family (21% vs. 17%), and consider referrals from other organisations (14% vs. 10%);
- Those in social grades ABC1 were more likely than those in social grades C2DE to act on recommendations from family/ friends (21% vs. 15%);
- Older consumers were more likely to use providers they/ their family had previously used (28% 55+ vs. 19% overall);
- White consumers were twice as likely as those from minority ethnic communities to use providers they/ their family previously used (23% vs. 12%);
- Consumers in Wales were more likely to use providers they/ their family/ friends had used before (27%), and particularly those in North Wales (33%).

Are consumers confident in the choice they made?

Almost all consumers were confident in the choice they made (95%), in line with high levels seen in 2024 (93%). Only 5% said that they were not very or not at all confident that the provider they chose would deliver a good service, consistent with previous years.

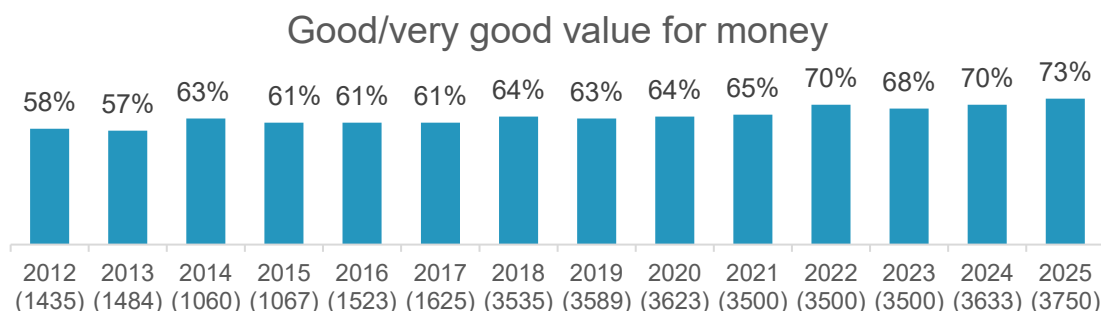
Confidence was lower among:

- 18 to 24 year olds (84% vs. 92% overall);
- Those from Asian backgrounds (88%);
- Tenants with housing issues (88%), those with immigration issues (88%) and issues related to benefits or tax credits (83%);
- Those who felt that they had limited choice in their provider (77% vs. 96% of those who felt they had a choice).

Do service providers deliver value for money?

Almost three quarters (73%) of consumers felt that the overall service and advice was good or very good value for money. This is a significant increase from last year, and the highest level seen since the survey began in 2012 (see *Figure 6*).

Fig 6. Do you think the overall service and advice provided was...? (Base size in brackets, by year, showing the proportion that believed the service and advice was good value for money).



The following groups were more likely to state that the service was good value for money:

- Males (75% vs. 71% females);
- Social grades ABC1 (74% vs. 70% C2DE);
- Consumers aged under 45 (76% vs. 69% over 45);
- Those using will writing services (78%) or seeking help with employment disputes (81%).

Value for money perceptions were lower among:

- Those living in the South East of England (67%);

- Those from Asian backgrounds (68%);
- Those who felt their choice was limited (35%) or wanted to shop around but didn't know how (53%).

92% of respondents were confident that the legal service provider they used would keep their money safe, a similar proportion to that reported in 2024 (91%), 2023 (90%) and 2022 (91%). This figure was lower for those aged 18 to 24 (84%), and those from ethnic minorities (90%). It was also lower for those using services for housing problems as a tenant (88%), benefits and tax credits (83%) and neighbourhood disputes (84%).

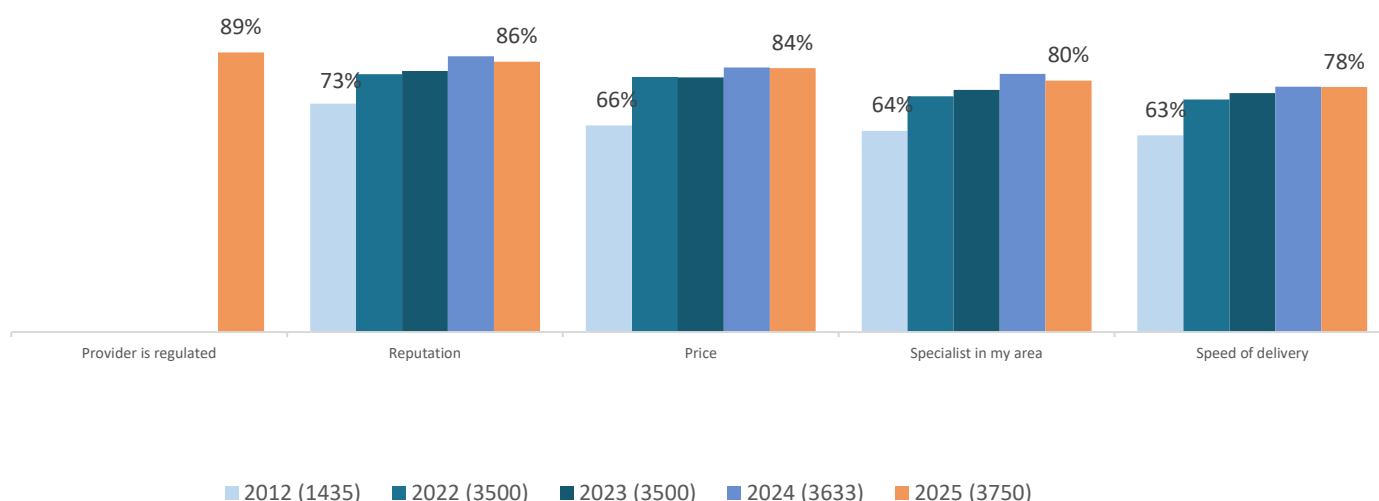
Consumers' decision making

For both providers and regulators, understanding what influences consumers' decision making is key to assessing whether the market is responding to consumers' needs and empowering consumers with the information they need to make informed decisions.

For the first time in 2025, consumers were asked about how important a provider being regulated was in their decision-making. This was the most important factor, selected by nine in ten (89%).

Reputation, price, specialism and speed remain key factors, as seen in previous years.

Figure 7. How important were the following factors when choosing your provider? (Base size in brackets, by year. Showing those who thought each was important.)



There are some variations between groups in importance of different aspects in provider choice:

- Provider regulation was more important to those in social grades ABC1 (90% vs. 84%), those aged over 55 (92%), and those using a power of attorney service (93%);

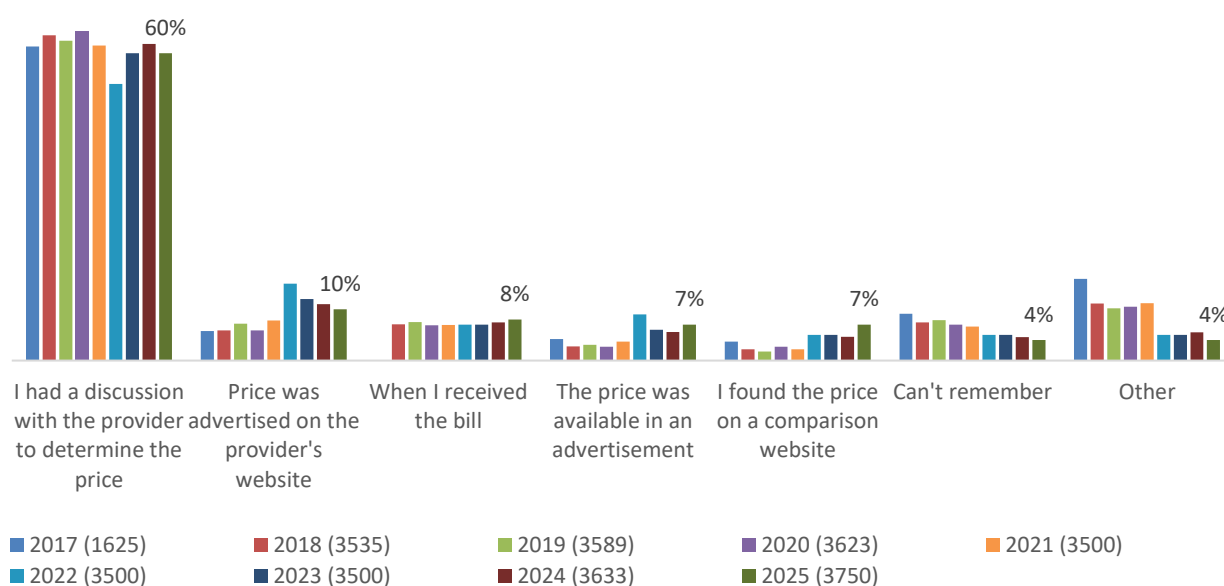
- Reputation was more important to over 35s (87% vs. 77% of 18 to 24s and 84% of 25 to 34s) and immigration related cases (94%);
- Price was more important for ABC1s (86% vs. 83% of CDE2s), those from ethnic minorities (86%) and those using conveyancing services (90%);
- Specialism was more important to females (81% vs. 78% of males) and ABC1s (80% vs. 75% of C2DEs);
- Speed was more important to ABC1s (80% vs. 73% of CDE2s), those from minority ethnic communities (83% vs. 75% for those who are White) and matters involving oaths/ certifying documents (90%), consumer goods and services (87%) and immigration (85%).

Price transparency

Having a discussion with the provider remained the most common way that consumers found out about the price of legal services (60%), remaining stable over the last three years (see *Figure 8*).

Those of social grade ABC1 were more likely to have had a discussion with the provider to determine the price (61% vs. 53% of C2DEs), along with those aged 55+ (72%), those from White backgrounds (62%), and those using conveyancing services (68%), oaths/ certifying documents (76%), will writing (66%) or power of attorney services (68%).

Figure 8. How did you FIRST find out what the price of the service would be? (Base size in brackets, by year.)



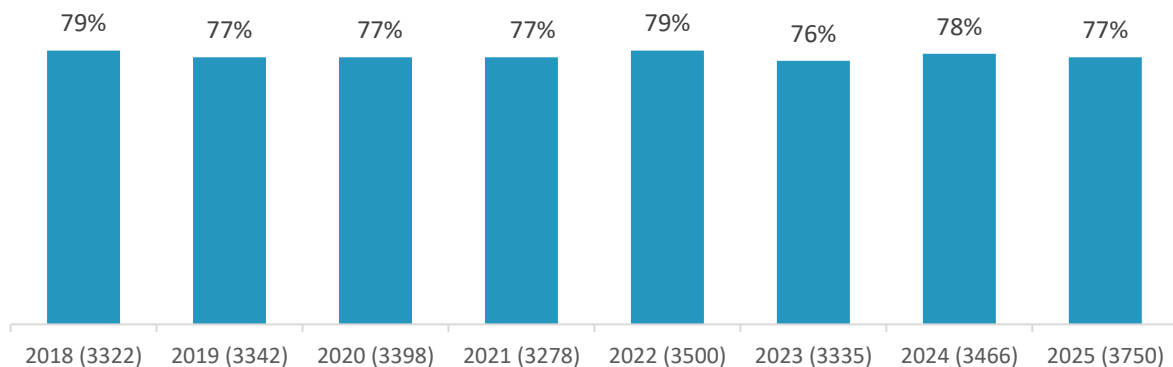
Ease of understanding price information

Three quarters of consumers (77%) found it easy to understand the cost of their legal services. This is generally in line with levels seen since 2018.

Whilst the majority found it easy to understand the cost, across all subgroups, the proportion finding it difficult to understand was higher among:

- Minority ethnic communities (8%);
- Those with housing problems as a landlord (13%) or as a tenant (8%).

Figure 9. How easy or difficult was it to understand this information about the price of the legal service?
(Base size in brackets, showing those who found it easy.)



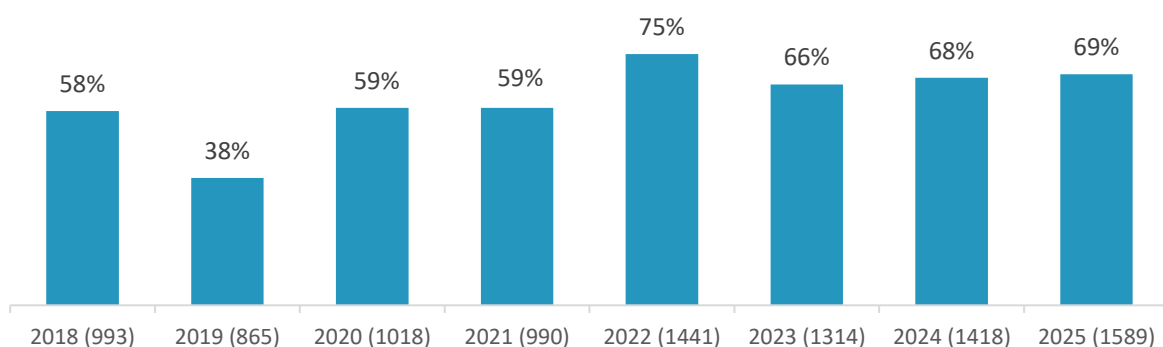
Making comparisons between providers

69% of consumers found price comparisons easy this year, consistent with 2024 but higher than reported between 2018 and 2021.

The following groups were more likely to find it easy:

- Those from White backgrounds (72% vs. 65% of those from minority ethnic communities);
- Those using will writing services (76%).

Figure 10. And how easy or difficult was it to make PRICE comparisons across the legal services providers? (Respondents who compared more than one legal service. Base size in brackets, by year. Showing those who found it easy).



Appendix

Table 2: Sample comparison on key demographics

			Year of Survey				
		2021	2022	2023	2024	2025	Difference from last year
	Region						
North East		4%	5%	5%	5%	5%	0
North West		12%	12%	12%	12%	12%	0
Yorkshire and the Humber		9%	9%	9%	10%	9%	-1
East Midlands		8%	8%	9%	9%	8%	-1
West Midlands		9%	10%	9%	9%	9%	0
East of England		11%	9%	10%	9%	10%	+1
London		12%	16%	14%	14%	14%	0
South East		18%	15%	15%	15%	15%	0
South West		11%	9%	10%	10%	10%	0
Wales		5%	8%	7%	7%	7%	0
Net: England		95%	93%	93%	93%	93%	0
Net: South exc. London		30%	24%	25%	25%	25%	0
Net: Midlands and Wales		23%	25%	25%	25%	24%	-1
Net: North		25%	26%	26%	27%	27%	0
	Gender						
Male		49%	50%	49%	49%	49%	0
Female		51%	50%	51%	51%	51%	0
	Age						
18-24		2%	6%	10%	10%	9%	-1
25-34		12%	17%	17%	17%	17%	0
35-44		15%	17%	15%	17%	16%	-1
45-54		15%	17%	17%	15%	17%	+2
55+		56%	43%	42%	41%	41%	0
	Ethnicity						
White British		75%	77%	68%	76%	65%	-11
Ethnic minority (total)		19%	19%	29%	24%	32%	+8
Mixed background		6%	3%	5%	4%	4%	0
Indian		4%	4%	6%	5%	6%	+1
Pakistani		2%	3%	4%	3%	4%	+1
Chinese		1%	2%	2%	2%	3%	+1
Black African		2%	3%	6%	6%	11%	+5
Black Caribbean		1%	1%	2%	1%	2%	+1

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