A Value-Based Segmentation of the Legal Services Market in England and Wales

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Executive summary

This study is the first value-based market segmentation of the legal market conducted in England and Wales. It addresses the following questions:

- What importance do consumers attribute to different elements of legal service provision when choosing between legal service providers?
- What are the ideal types of legal services provision that maximise the value perceived by consumers and the likelihood that they will use a legal service provider?
- Are there groups of consumers holding different preferences for types of legal services provision (e.g., in terms of pricing strategy, methods of contact, or level of specialisation)?

The study involved the collection of structured data on a large sample of individual consumers and small business owners (total N = 2,538 respondents), who simulated the choice of a legal service provider that could assist them with their legal issue. We included several legal issues that varied in terms of frequency of likely occurrence and potential impact on consumers' lives:

- residential conveyancing, housing, and employment for individual consumers; and
- commercial property and employment for small business owners.

The respondents – all of whom had experienced a legal issue in the previous four years – evaluated a large set of hypothetical providers. The providers were presented to them as a combination of service attributes. These attributes were defined based on the results of a qualitative study (see Phase 2 report) and in consultation with the Solicitors Regulation Authority (SRA). There were two variations of each attribute, and each provider represented a unique combination of one variation for each attribute:

- product-related attributes: whether the legal service provider explains the legal process and jargon well and is approachable, so that the client is clear about what is happening but the case takes a little longer – or the case moves quite quickly, but the legal service provider does not explain the legal process and jargon well, and is not approachable, so that the client is uncertain about what is happening;
- place-related attributes: whether the service is provided mainly online or mainly in person;
- price-related attributes: whether the client receives a fixed price at the outset, paired with a one-size-fits-all approach to the service provided, or the client receives an estimate of the costs which may change as the service is tailored to their precise needs;
- people-related attributes: whether the legal service provider is positioned as specialising in the type of legal issue at hand (niche positioning), or whether they offer services in several areas of law (generalist positioning); and
- process-related attributes: whether the legal service provider offers updates upon request or on a regular basis.

From each respondent's overall evaluations of these prospective legal service providers, a conjoint analysis allowed us to extrapolate which attributes were considered more or less important. These relative importance measures were subsequently used as the basis for the classification of consumers into homogeneous segments by means of a cluster analysis. We then identified what their ideal legal service provider would look like for each segment.

The main results of the analysis revealed that several distinct consumer segments exist in the market for legal services.

- Four distinct segments emerged from the analysis of **individual consumers** choosing between legal service providers for a **conveyancing** issue:
  - Segment C1: Characterised by a **balanced** importance of the different service attributes, and distinct because of the preference for **face-to-face** service provision. This preference is unique, appearing in none of the other segments.
  - Segment C2: Distinguished by the high importance of place (online or face to face) compared to other attributes, accompanied by a strong preference for **online** over face-to-face service provision.
  - Segment C3: Distinguished by the high importance ascribed to the price model (fixed price or estimate communicated at the start), accompanied by a strong preference for **fixed and transparent pricing** and online service provision.
  - Segment C4: Characterised by a very strong prioritisation of product (approachability or speed). For this segment it is crucial that the provider has high **approachability**, while all other aspects are of secondary importance.
- Two distinct segments emerged from the analysis of **individual consumers** choosing between legal service providers for a **housing** issue:
  - Segment H1: Characterised by a **balanced** importance of the various service attributes, this segment values both approachability and the transparency of fixed pricing, while displaying a slight preference for online service provision.
  - Segment H2: Strongly prioritising the product attribute (approachability or speed) when choosing a provider, this segment regards it as crucial that the provider offers **approachability**. Other factors matter to a much lesser extent.
- Three distinct segments emerged from the analysis of **individual consumers** choosing between legal service providers for an **employment** issue:
  - Segment E1: Regards the price model (fixed price or estimate communicated at the outset) and place (online or face to face) attributes as more important than the other two segments. Attaches a high value to the transparency of **fixed pricing** and the possibility of receiving the service **online**.
  - Segment E2: Considers the people attribute (specialised or generalist) as more important than the other two segments, followed by product (approachability or speed). This segment's ideal service configuration is characterised by **specialisation**, followed by approachability.

- Segment E3: Strongly prioritises the product attribute (approachability or speed) over all the other service attributes when deciding whether to use a legal service provider. This segment ascribes higher value to approachability and explanations than to the speed at which the case progresses.
- Two distinct segments emerged from the analysis of **small business owners** choosing between legal service providers for a **commercial property** issue:
  - Segment CP1: Characterised by a **balanced** importance of the four service attributes. Specialisation, the provision of online services, and to a lesser extent, regular updates and approachability, characterise this segment's ideal service provider.
  - Segment CP2: Attaches more value to the people (specialised or generalist) and process (updates regularly or on request) attributes. Interestingly, product (approachability or speed) is the least important attribute. This segment's ideal providers are specialists, offer regular updates and **speed** rather than approachability, and operate through online channels.
- Three distinct segments emerged from the analysis of **small business owners** choosing between legal service providers for an **employment** issue:
  - Segment E1-SB: Prioritises the people attribute (specialised or generalist) and attaches a very high value to **specialisation** and approachability when evaluating a legal service provider.
  - Segment E2-SB: Product (approachability or speed) is the most important attribute for this segment, while a high value is attached to **approachability**. The other three attributes are much less important.
  - Segment E3-SB: More **balanced** in terms of the relative importance of the service attributes, this segment prioritises the product, but also regards the other three attributes as fairly important.
- In summary, across all segments and legal issues, the product attribute (approachability or speed) was generally regarded as most important both by individual consumers and small businesses.
  - Individual consumer segments generally prefer service configurations that place greater emphasis on explaining the process and the jargon to the client to configurations favouring speed and efficiency.
  - Small business owners with transactional issues have the opposite preference.
- The place attribute (online or face to face) is seldom the most important factor in determining the decision to use a legal service provider.
  - However, with regard to the way the service is delivered, most segments prefer providers that offer their services online when it comes to legal issues related to conveyancing, housing, and commercial property.
  - By contrast, the majority of segments facing employment legal issues (both individual consumers and small business owners) prefer providers that offer their services face to face.

- With the exception of one conveyancing segment and one employment (individual consumer) segment, the price model (fixed price or estimate communicated at the start) was not the most important attribute in determining the decision to use a legal service provider.
  - When considering the price model, consumers tend to prefer providers that offer a fixed price communicated at the outset for a one-size-fits-all approach.
  - This preference was less pronounced for non-transactional legal issues (housing and employment), in relation to which some segments displayed a slight preference for the service to be tailored to their specific needs at a variable price.
- The people and process attributes varied in importance across segments, but displayed a relatively uniform pattern of preferences: most consumers prefer specialised to generalist legal service providers, and regular to on-demand updates.
- For individual consumers, the importance of the attributes influencing the decision to use a legal service provider differ less across legal issues than across different groups of consumers facing the same legal issue. The main difference across legal issues was observed between transactional (conveyancing, commercial property) and non-transactional issues (employment, housing): online provision of services is favoured over face-to-face provision in the case of the former, but not the latter.

These results provide a series of insights on the preferences of the various segments. By encouraging changes to service design or the effective communication of service characteristics to which segments attach a high value, the legal services industry can enhance the likelihood that those segments will gain improved access to legal services.

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1. Introduction

1.1 Inception of the research project

This research was commissioned by the Solicitors Regulation Authority (SRA), with the following overarching aims: (i) to deepen the understanding of consumer concerns and requirements for legal services, (ii) to identify gaps in the provision of legal services, and (iii) to determine whether any such gaps are detrimental and to whom. The SRA further specified that the research should focus on individual consumers and small business owners in England and Wales. The research team consisted of consumer behaviour researchers at Bayes Business School (formerly Cass), City University of London.

The project consists of five cumulative phases, with each phase building on the findings of the previous phase. Phase 1, based on extensive desk research, provided a comprehensive examination and systematisation of existing frameworks used to segment the supply and demand of legal services in England and Wales. Guided by the findings of Phase 1, Phase 2 featured a qualitative study to assess consumers' legal needs and experiences in the legal customer journey. Phase 3 – the focus of this report – implements a novel value-based approach for the identification of market segments, based on their ideal legal service provider configuration. Phase 4 will provide an in-depth examination of ethnic minorities' and low socioeconomic individuals' understanding of, attitudes towards, and barriers to accessing legal services. Finally, Phase 5 will test policy interventions designed to improve the way individual consumers and/or small business owners in England and Wales perceive their legal needs.

1.2 Scope, aims, and contributions of this report

This report presents the results of Phase 3 of the research project. Legal services offer both individual consumers and small businesses opportunities to enforce and defend their rights, yet several pieces of evidence indicate that consumers do not always access the legal services they need (Solicitors Regulation Authority (SRA), 2017; World Justice Project, 2019a, 2019b; Legal Services Board (LSB), 2021). Every year, approximately 3.6 million adults in England and Wales experience unmet legal needs involving some dispute they are unable to address because they do not receive sufficient information, assistance, or professional help. Although 1.8 million small businesses in England and Wales face legal issues annually, only a quarter of them seek professional help (LSB, 2021). The economic value of these unmet needs in the legal services market has been estimated at £11.4 billion annually (Ajaz *et al.*, 2021). Improving consumers' access to justice and the quality of the services provided requires an in-depth understanding of the causes of those unmet legal needs.

The legal services market is centred on a complex, often intangible product, characterised by high heterogeneity in consumer needs, preferences, benefits sought, and decision-making processes. Consequently, identifying homogeneous market segments with respect to these relevant factors can support legal service providers and regulators in their efforts to reduce the gap between supply and demand. This research is informed by prior work, but implements a novel, value-based market segmentation approach to identify distinct groups of legal services consumers who may prefer different types of service provision and may respond differently to the attributes and benefits provided by the legal service.

The main aims of this report are to:

- Increase our understanding of the factors influencing consumer preference for legal service providers.

Most segmentation frameworks and studies undertaken to date have focused on how consumer behaviour toward legal services varies depending on general and observable factors, such as the type of legal issue faced, or consumer demographic and psychographic characteristics. This research offers novel insights on how the characteristics of a legal service provider's offering influence the decision to use that provider. It does so by asking respondents to evaluate different hypothetical legal service providers, which enables us to assess how much weight is attached to specific service attributes (e.g., the channel through which the service is provided). It also enables us to identify the specific levels of those attributes (e.g., online versus face to face) consumers prefer.

- Examine the differences between groups of consumers with respect to the relative importance of legal service attributes and to ideal legal service configurations.

We report the results of a value-based segmentation analysis focused on five different legal issues characterised by varying frequency of likely occurrence and impact on consumers' lives. The analysis revealed the existence of distinct segments of consumers characterised by differences in the relative importance of specific attributes of the service, and made it possible to identify the ideal legal service provider for each segment. Interestingly – and here we highlight a limitation of prior segmentation frameworks – these segments characterised by very distinct preferences did not exhibit significant differences in terms of their observable characteristics.

- Offer data-driven and actionable recommendations on how to enhance the perceived value of the legal service provided.
- The results aim to provide insights into how modifying the configuration of the legal service provision can enhance the value consumers perceive in the legal services offering, which can in turn increase their propensity to access legal services. In addition, the results can guide an informed examination of the available supply of legal services. This can assist in identifying potential gaps that may be responsible, at least in part, for the substantial proportion of legal needs experienced by consumers that remain unmet and not acted upon.

1.3 Structure of the report

Section 2 contextualises this research project by explaining the rationale for the choice of its methodology and analytical approach. Section 3 presents the research design, the stimuli, and the surveys, as well as the characteristics of the sample. Section 4 describes the results of the segmentation analysis; first by examining the differences and similarities between results for the five legal issues examined, and second by unpacking the heterogeneity of the data relating to each legal issue. Sections 5 and 6 discuss these results and their implications, and present some concluding remarks.

2. Motivation for and approach to the research

Market segmentation allows us to simplify the understanding of a market by turning a heterogeneous pool of consumers characterised by different needs and desires into a number of smaller homogeneous segments. One of the focal aims of a market segmentation analysis is to facilitate the matching of consumers' needs and desires with the offers of suppliers. While the legal services market provides consumers with opportunities to enforce and defend their rights, many consumers fail to access these opportunities (SRA, 2017; World Justice Project, 2019a; 2019b; LSB, 2021). It is possible that these unmet legal needs could, at least partly, be due to a mismatch between

- the service characteristics that consumers deem most important and those offered by legal service providers; or
- the service configurations consumers would prefer and those available in the marketplace or promoted to the market.

With this possibility in mind, this segmentation analysis adopts a research approach that:

- focuses on the examination of the importance that consumers attach to different aspects of the service provision;
- identifies distinct market segments based on these factors; and
- defines the ideal legal service provider for each segment.

In the next section, we explain the rationale for the choice of our research approach by providing a brief overview of the two alternative approaches to market segmentation, and by presenting an accessible, non-technical description of the analytical techniques used in the research.

2.1 A priori versus post hoc segmentation

Several segmentation frameworks and consumer research studies have examined the market for legal services in England and Wales. Most of this prior research has suggested that attitudes and behaviours related to legal services may differ across consumers depending on factors such as the characteristics of the legal issue concerned, demographics, or psychographic variables (see Phase 1 Report for a detailed review and systematisation of this body of research).

Most of these studies adopt an 'a priori' approach to market segmentation,[1] in which the researcher chooses the variables to be used to define different segments – for example, the specific legal issue faced. Consumers are then classified into groups on the basis of the selected variables, on the assumption that the emerging groups will exhibit attitudinal and behavioural responses toward legal services that are homogeneous within groups and different across groups. This approach to segmentation therefore assumes that consumers that appear similar on observable characteristics may also exhibit similar attitudes, preferences, and behaviours.

Often, however, a specific observable characteristic – for example, the nature of the legal issue faced or a consumer's demographic profile – can correspond to very different attitudes and behaviours. Conversely, consumers who face different legal issues or have distinct demographic profiles could display similar preferences, seek the same benefits in a legal service, and value the same attributes.

These considerations substantially limit the value of a priori segmentation attempts, which may group consumers based on variables that are not very diagnostic of their responses to products and services (Sandy, Gosling and Durant, 2013).

In the light of the above limitations, we chose to adopt a different, 'post hoc' segmentation approach, which does not rely on these assumptions. This approach classifies consumers into homogeneous characteristics based on variables that directly capture their attitudinal and behavioural responses to the attributes of a legal service.

With this approach, the actual nature of market segments is not known until the data analysis has been conducted; moreover, whether the emerging segments correspond

[1] For more information on different segmentation approaches, see Dolnicar, Grün and Leisch (2018).

to a specific profile on the basis of observable characteristics has to be tested empirically, rather than assumed. It is important to note that consumer background variables – particularly demographic ones, but also psychographics – do not necessarily correlate well with attribute preferences, as these variables explain relatively small amounts of variance in actual consumer behaviour (Moore, 1980; Yankelovic and Meer, 2006; Sandy, Gosling and Durant, 2013). For example, in a study of media consumption, demographics and personality variables together could explain differences between consumer preferences and behaviours only to a minimal extent (5% on average across different consumption variables; Sandy, Gosling and Durant, 2013). The reason behind this limited explanatory power is the explosion in consumer heterogeneity that has characterised the vast majority of markets in the past 50 years. For example, the predictive ability of education to explain different consumer preferences or purchasing patterns drops drastically as consumers with lower levels of education become affluent; similarly, the importance of the price model is unlikely to be strongly correlated with income as sophisticated and educated consumers become more price conscious. Indeed, the limited effectiveness of many segmentation efforts can be attributed to two main factors:

- an excessive focus on consumers' identities as captured by demographics and psychographic variables, while neglecting the impact of the product features that matter most to current and prospective customers;
- too little emphasis on actual consumer behaviour, which reveals consumer attitudes and helps predict their behaviour (see Yankelovic and Meer, 2006).

2.2 Conjoint-based segmentation analysis

Our segmentation study involves the use of conjoint analysis, a popular and powerful instrument for measuring consumer preferences and understanding how consumers value different components or features of products and services. Conjoint analysis[2] has been used extensively to examine consumer decision-making in several markets, including financial services, retail, and insurance (Green and Srinivasan, 1990; Markham, Diamond and Hermansen 1998); to date, however, it has not been implemented in the context of legal services, where we argue it could provide novel insights useful to understand and segment the market.

Conjoint analysis is based on the premise that a product can be represented as a set of attributes, and that consumers assess product value by combining the value provided by each of its attributes. An advantage of this approach is its resemblance to actual

[2] Conjoint analysis was introduced in marketing studies by Green and Rao (1971).

product and services evaluations, for which consumers are more likely to provide holistic evaluations than engage in the independent assessments of each individual product attribute (which is a typical practice in more traditional survey-based segmentation studies).

In a conjoint analysis, while respondents provide overall evaluations of different hypothetical service providers, the analyst can extrapolate the value (i.e., the utility) that they attach to each individual attribute, which makes it possible to understand the trade-offs consumers make when choosing between different options. The analysis also allows us to estimate the value consumers would attach to any combinations of the attributes examined, which can be used to identify the ideal legal service provider that would be preferred by each consumer. Therefore, the analysis produces the following two important sets of results.

1. **The relative importance of service attributes**
    - Expressed as a percentage, this measures how much difference each attribute could make in the total value consumers attach to the product, relative to the other attributes featured in the study.
    - It depends on the choice of attributes and levels.
    - It can be compared within studies with the same attribute lists.
    - An attribute with a relative importance of 30% is three times as important as an attribute with a relative importance of 10% in affecting consumer value and preferences.

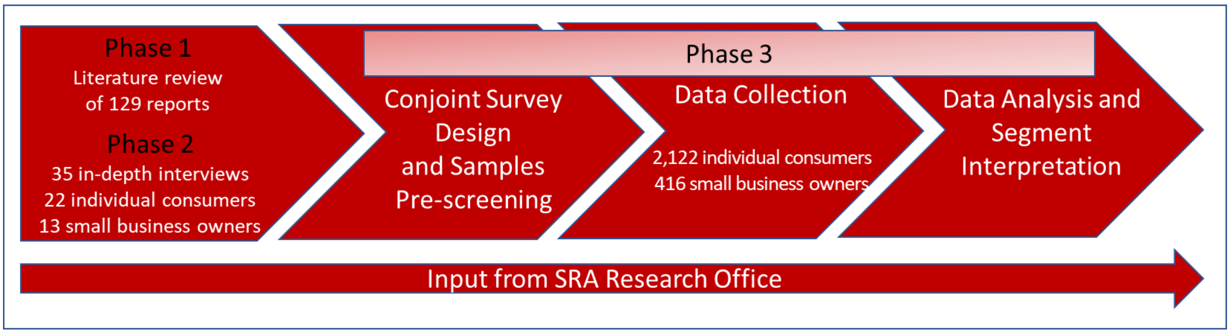
2. **The value generated by each attribute level (part-worth)**
    - Expressed as a percentage, this measures how much difference each attribute could make in the total value consumers attach to the product, relative to the other attributes featured in the study.
    - It depends on the choice of attributes and levels.
    - It can be compared within studies with the same attribute lists.
    - An attribute with a relative importance of 30% is three times as important as an attribute with a relative importance of 10% in affecting consumer value and preferences.

The results of the conjoint analysis can then be submitted to a multivariate classification technique in order to identify groups of consumers that are homogenous with respect to their preference for a specific type of service provider, and significantly different from other segments. This project utilises a k-means cluster analysis classification method (see Dolnicar, Grün and Leisch, 2018 for technical details on this technique).

3. Methodology

This section outlines the methodology of this segmentation study, which is grounded on the insights obtained in Phases 1 and 2 of the research project. These phases consisted of an extensive literature review of the legal services market, and of an in-depth qualitative study of the consumer decision-making process along the legal journey, respectively. The design of this phase of the research also benefited from consistent input from the SRA in the course of the various stages of the research process.

Figure 3.1 Overview of the research process



The study is quantitative in nature and involves the collection of structured data through a survey (for details see section 3.1). It was administered to a large sample of English and Welsh individual consumers and small business owners (for details see section 3.2). The data collection took place between July and August 2022.

3.1 Design and procedure

The data for this post hoc value-based segmentation of legal services were collected by means of a structured survey instrument with two sections: one containing the main conjoint analysis task; the other collecting additional variables to enrich the analysis. For the conjoint analysis, we asked respondents to imagine facing a specific legal issue (see section 3.2.1 for details) and to indicate how likely they would be to use each of a set of hypothetical service providers, all of whom were available to take on the case. Each service provider was represented as a combination of the attributes offered (see section 3.2.2 for details). This choice of research design positions our analysis at a specific stage of the legal journey: when consumers are already aware they have a legal need and are considering seeking legal advice, but often fail to do so (Spicer *et al*., 2013).

3.1.1 Choice of legal issues

Participants were asked to evaluate the service providers with different legal issues in mind – one of three for individual consumers and two for small business owners, respectively. This was done in order to connect this study to prior segmentation frameworks, which regarded the type of legal issue as an important segmentation variable (Oxera Consulting, 2011; LSB, 2018), as well as to expand the generalisability of the results to different areas of law.
We chose a set of five legal issues (rather than a larger number) in order to avoid fragmenting the sample into subsamples that were too small, which would have reduced the statistical power of each statistical analysis. The specific legal issues were selected to have varying frequency of occurrence and potential consequences in consumers' lives. In particular, individual consumers were asked to imagine that the legal issue they faced was related to conveyancing, to employment, or to housing. Conveyancing was selected to represent relatively common non-contentious legal issues within a transactional area of law; employment and housing were selected as representative of highly consequential contentious legal issues within a non-transactional area of law. Although less commonly experienced than conveyancing, we regarded these two areas of law as particularly relevant to the current market, as a rise in the frequency of these issues was expected in the aftermath of the Government's response to the COVID-19 pandemic (e.g., due to the economic circumstances and the return of the notice period for Section 21 evictions to two months after the extensions granted during the pandemic).

Small business owners were asked to imagine two legal issues – one related to employment (in this case, from the perspective of the employer) and one related to commercial property. The two issues were presented in random order (half of the respondents answered with respect to employment first; the other half with respect to commercial property first). Moreover, these two areas were selected to be representative of different types of legal issue: contentious/non-transactional in the case of employment, as against non-contentious/transactional in the case of commercial property. The scenarios presented to small business owners also emphasised how the legal issue, if unaddressed, would pose some risk for their business activity. This addition was motivated by one of the results that emerged from our qualitative study in Phase 2 of this project, which revealed that for small business owners, the decision to use a legal service provider is influenced by the perceived risk of leaving the matter unaddressed. Figure 3.2 below presents the five legal scenarios.

Figure 3.2 The five legal scenarios used for the conjoint study

<table>
<tr><th></th><th>Individual Consumers</th><th></th><th>Small Business Owners</th></tr>
<tr><td>Conveyancing</td><td>Imagine you find yourself facing a significant residential conveyancing issue: you are buying a home and need to register the change of ownership with the Land Registry</td><td rowspan="2">Employment</td><td rowspan="2">Imagine you have an employee and have had to tell them that their role is no longer needed, and they are being considered for redundancy. The employee claims that it is an unfair dismissal and is seeking legal advice. You have asked your local business network for guidance, and they suggest you seek professional legal advice. They say that trying to sort the matter yourself will be time consuming, your business could be exposed to potential claims under legislation, and the firm's reputation could be damaged if the redundancy process is badly managed.</td></tr>
<tr><td>Employment</td><td>Imagine you find yourself facing a significant employment dispute that is related to unfair dismissal by your employer</td></tr>
<tr><td>Housing</td><td>Imagine you find yourself facing a significant housing problem that is related to a dispute with your landlord</td><td>Commercial Property</td><td>Imagine your business rents business premises but you might be evicted as you cannot extend the lease agreement. You have asked your local business network for guidance, and they suggest you seek professional legal advice. They say that trying to sort the matter yourself will be time consuming and you may not be protected by lease extension legislation.</td></tr>
<tr><td colspan="2">You have been searching for a legal service provider to help you with the case, and have identified 16 options that all had good customer reviews and immediate availability to take on your case.</td><td colspan="2">As an owner of the business, you have been searching for a legal service provider to help your business with the case and have identified 8 options. Each option has good customer reviews, has immediate availability to take on your case, and offers good value for money.</td></tr>
</table>

3.1.2 Attributes and levels of the legal service provider

The legal service providers that respondents were asked to evaluate were represented by describing a series of specific characteristics of their offering (service attributes). Five service attributes were used for the individual consumer surveys and four for the small business owner surveys. These attributes were developed based on the results of a series of in-depth qualitative interviews conducted in Phase 2 of the research project with individual consumers and small business owners who faced a legal issue. The selection of attributes and the definition of their levels to be featured in the descriptions was then refined in consultation with the SRA.

The qualitative interviews revealed that for individual consumers, factors relating to approachability, responsiveness, emotional support, process transparency, engagement methods, cost, and specialism emerged as particularly influential with respect to the decision of whether to seek legal support and the choice of a legal service provider. Moreover, in the case of small business owners, factors relating to trust, time sensitivity, specialism, and cost were among the most relevant.

To decide which of these factors to focus on in the conjoint task, an important criterion was to make sure we selected attributes characterised by a meaningful degree of actionability on behalf of the service provider. For example, the provider can decide how responsive to be and which engagement methods to offer, whereas how emotionally supportive a provider is perceived to be depends to a great extent on consumers' subjective experience in the interaction. Emotional support was therefore not included as a factor.

In addition, to provide a realistic and comprehensive description on the basis of which respondents could form meaningful evaluations, we made sure that the final set of attributes included the most important aspects of the services marketing mix: product, place, people, process, and price (Booms and Bitner, 1981).

Furthermore, when defining how each attribute would vary (i.e., the attribute levels), we made sure to take into account the feasibility of the different service provider descriptions. As a result, the selected attribute levels considered the trade-offs between different elements of the service provision. For example, offering a fixed price for the service provided may reduce the extent to which it is economically feasible to tailor the service to the client's needs; involving the client in the process and explaining every step, as well as the legal jargon, may result in the case taking longer to be completed.

The final sets of attributes used for the conjoint task and their corresponding levels are presented in Figure 3.3. Note that these refer to the survey administered to individual consumers; in the case of small business owners, we had to exclude one of the attributes because, in light of the smaller size of the available participant pool, each respondent would complete the conjoint task for both legal issues, and each additional attribute would have doubled the expected length of the task. After discussion with the SRA, and in light of recent work on price transparency (SRA, 2017b; Europe Economics and YouGov, 2018), we opted to not include price model in the list of attributes presented to small business owners.

Figure 3.3 Attributes and levels used to define the hypothetical legal service providers for individual consumers

Attribute	Levels	
Product	A	The legal service provider explains the legal process and jargon well and is approachable, so you are clear about what is happening, but your case will take a little longer.
	B	Your case will move quite quickly, but the legal service provider does not explain the legal process and jargon well, and is not approachable, so you are uncertain about what is happening.
Place	A	The service will be provided mainly online (emails/video calls/telephone).
	B	The service will be provided mainly in person (face to face).
Price Model	A	You have a fixed price that you are told at the start, and the service is not tailored exactly to your needs; it is more of a one-size-fits-all approach.
	B	You have an estimate of the costs for your legal work which may change as the service is tailored to your precise needs.
People	A	They specialise and have additional qualifications in this type of legal work.
	B	They offer services in several areas of law rather than specialising in this type of legal work.
Process	A	They offer updates on the case progress only upon request.
	B	They offer regular updates on the case progress.

In the case of individual consumers, each hypothetical legal service provider description featured a random combination of levels for the five attributes; in the case of small business owners, each provider description featured a random combination of levels for the four attributes (the same as those for individual consumers excluding price model). The total number of hypothetical providers with that number of attributes and two levels per attribute would have been 32 for individual consumers and 16 for small business owners. To reduce the burden of providing such a high number of evaluations, we reduced the set to 16 for individual consumers and to 8 for small business owners by using an orthogonal design procedure that allows the use of a lower number of evaluations without loss of accuracy in the results (Steckel, deSarbo and Mahajan, 1991). Figure 3.4 presents an example of the hypothetical legal service provider descriptions used in the individual consumer survey. The complete sets of descriptions that were included in the two surveys are presented in the Appendix.

Figure 3.4 Example of legal services description presented to individual consumers

Provider 1

Product	**Your case will move quite quickly, but they do not explain the legal process and jargon well, and are not approachable, so you are uncertain about what is happening.**
Place	**The service will be provided mainly online (emails/video calls/telephone).**
Price Model	**You have an estimate of the costs for your legal work which may change as the service is tailored to your precise needs.**
People	**They offer services in several areas of law rather than specialising in this type of legal work.**
Process	**They offer updates on the case progress only upon request**

For each description, participants indicated to what extent they would consider using the legal service provider for the legal issue described on an eleven-point scale (0 = I would definitely not use this provider; 10 = I would definitely use this provider).

3.1.3 Other measures

The survey also included a series of other measures. Participants indicated the level of importance they attached to the fact that their chosen legal service provider is regulated and whether they would check that the legal service provider has a structured complaint process in place before instructing them, and then provided demographic information. The specific demographic questions differed depending on whether the respondent was an individual consumer or a small business owner and included age, gender, ethnicity, employment status, education level, marital status, household structure, area of residence, disability status, English proficiency, legal status of the business, and the turnover of the company in the previous financial year. In addition, participants completed questions on a series of individual difference psychographic measures. These included general personality traits such as risk aversion, information avoidance, instant gratification, interpersonal trust, belief in a just world, proneness to regret, as well as legal-specific measures including legal self-efficacy, legal anxiety, and perceived inaccessibility of the justice system.

3.2 Sample

The target sample for this study included two groups of natural and legal persons that are both deemed 'less sophisticated' because they have limited or no experience with legal services (Oxera Consulting, 2011; LSB, 2018; SRA, 2019), namely, individual consumers and small business owners. With respect to the latter, we specifically targeted 'micro businesses' with fewer than 10 employees (*Small Business, Enterprise and Employment Act 2015*). This target sample is characterised by a general lack of experience and expertise, which often creates a power imbalance with respect to legal service providers (Glückler and Armbrüster, 2003; Oxera Consulting, 2011; Furnham, McClelland and Swami, 2012; Competition and Markets Authority [CMA], 2016; Rottmann, Glas and Essig, 2015; SRA, 2019).

Individual consumers also tend to have relatively low legal capabilities (i.e., 'the capabilities required for an individual to have an effective opportunity to make a decision about whether and how to make use of the justice system to try to resolve a problem'; Pleasence and Denvir, 2021, p.1) and are thus less likely to obtain help and more likely to experience difficulties when addressing legal issues (YouGov, 2020). Similarly, the majority of microbusinesses have no in-house legal capacity (i.e., 'a worker within the business that is either a qualified lawyer or has some training in handling legal issues'; Larkin *et al.*, 2018), and hence they are also more likely to attempt to address legal issues by themselves without seeking legal support (Blackburn, Kitching and Saridakis, 2015; Larkin *et al.*, 2018).

The qualitative interviews we conducted revealed that even the identification of a legal need itself may enhance the consumers' feelings of vulnerability, induced by the perception of not having a sufficient understanding of the legal process and of how legal service providers may support them. Consequently, it is particularly important to understand what characteristics of the legal service provision may increase these target groups' propensity to use legal service providers.

The survey was administered online to a total sample of 2,538 respondents from England and Wales. Of these, 2,122 were individual consumers, split into three subsamples: conveyancing, with 693 respondents; housing, with 712 respondents; and employment, with 717 respondents, while 416 were small business owners who had been trading on average for 9.5 years. The small business owners completed the conjoint task for both the employment and commercial property issue. Participants were recruited through the Prolific Academic panel.[3] Participants in the individual consumer sample were pre-screened to ensure they had experienced a legal issue in the four years prior to the study (irrespective of whether they had acted upon it or not); participants in the small business owners sample were pre-screened to confirm they had decision-making power for their business and that they were effectively 'micro-businesses' (i.e., fewer than 10 employees[4]). Overall, 21.4% of the small business owner sample had previously used a legal service provider. For an overview of the demographic profile of the samples see Tables 3.1 (for individual consumers) and 3.2 (for small business owners).

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[3] The quality of this panel has been verified by several research studies (Brandon *et al*., 2014; Kees *et al*., 2017; Peer *et al*., 2017; Palan and Schitter, 2018; Boas, Christenson and Glick, 2020).

[4] Despite the fact that respondents in the small business owner sample were pre-screened to have up to 9 employees, 21 of them (5% of the sample) reported in the main survey that their company had more than 9 employees. Including or removing these observations from the analyses does not change the results, and we have therefore not excluded them.

Table 3.1 Demographic profile of the individual consumer sample

		Conveyancing (N = 693)		Housing (N = 712)		Employment (N = 717)	
Variable	**Category**	**N**	**%**	**N**	**%**	**N**	**%**
Gender	Male	194	28.0%	260	36.4%	272	37.9%
	Female	499	72.0%	444	62.2%	440	61.4%
	Other/Prefer not to say	0		10	1.4%	5	.7%
Age	18-24	8	1.2%	85	11.9%	46	6.4%
	25-34	231	33.3%	250	35.0%	198	27.6%
	35-44	238	34.3%	192	26.9%	222	31.0%
	45-54	107	15.4%	95	13.3%	129	18.0%
	55-64	81	11.7%	78	10.9%	84	11.7%
	65-74	24	3.5%	13	1.8%	33	4.6%
	Over 75	4	.6%	1	.1%	5	.7%
Geographic Location	England	621	89.6%	680	95.2%	643	89.7%
	Wales	72	10.4%	34	4.8%	74	10.3%
Ethnicity	Non Ethnic Minority	626	90.3%	564	79%	629	87.7%
	Black, Asian, and Minority	67	9.7%	150	21%	88	12.3%
Yearly Gross Household Income	Below £30,000	121	17.5%	158	22.2%	213	29.7%
	£30,000 and above	549	79.2%	432	60.7%	485	67.6%
	Prefer not to say	23	3.3%	24	3.4%	19	2.6%
Education	Masters degree or higher	174	25.1%	186	26.1%	147	20.5%
	Bachelor degree	317	45.7%	285	39.9%	332	46.3%
	A-level or equivalent	111	16.0%	132	18.5%	132	18.4%
	O-level or GCSE equivalent	45	6.5%	67	9.4%	60	8.4%
	Trade apprenticeship	18	2.6%	17	2.4%	21	2.9%
	Other	28	4.1%	27	3.9%	23	3.5%
Location	Rural	244	35.2%	174	24.4%	204	28.5%
	Urban	449	64.8%	540	75.6%	513	71.5%
Marital Status	Single	94	13.6%	259	36.3%	198	27.6%
	Married/Civil partnership	377	54.4%	256	35.9%	328	45.7%
	Cohabiting	149	21.5%	147	20.6%	130	18.1%
	Divorced/Separated	65	9.4%	48	6.7%	51	7.1%
	Widowed	8	1.2%	4	.6%	10	1.4%

Table 3.2 Demographic profile of the small business owner sample

Variable	Category	N	%
Gender	Male	173	41.6%
	Female	240	57.7%
	Other/Prefer not to say	3	.7%
Age	18-24	27	6.5%
	25-34	74	17.8%
	35-44	143	34.4%
	45-54	93	22.4%
	55-64	67	16.1%
	65-74	11	2.6%
	Over 75	1	.2%
Geographic Location	England	405	98.0%
	Wales	8	2.0%
Ethnicity	Non Ethnic Minority	383	92.1%
	Black, Asian, and Minority	33	7.9%
Education	Masters degree or higher	87	20.9%
	Bachelor degree	188	45.2%
	A-level or equivalent	84	20.2%
	O-level or GCSE equivalent	39	9.4%
	Trade apprenticeship	8	1.9%
	Other	10	2.4%
Location	Rural	130	31.3%
	Urban	286	68.8%
Number of Employees	1	210	50.5%
	2-5	150	36.1%
	6-9	35	8.4%
	More than 9	21	5.0%

Variable	Category	N	%
Roles	Owner	350	84.1%
	Partner	37	8.9%
	Director	74	17.8%
Turnover in Last Financial Year	First year of trading	27	6.5%
	Less than £25,000	156	37.5%
	£25,000 to £49,999	65	15.6
	£50,000 to £99,999	57	13.7%
	£100,000 to £249,999	39	9.4%
	£250,000 to £499,999	30	7.2%
	£500,000 to £999,999	17	4.1%
	Over £1 million	18	4.4%
	N/A	7	1.7%
Type of Clients	Individual members of the public	304	73.1%
	Other businesses	219	52.6%
	Government	22	5.3%
	Charities	45	10.8%

Approximately 8.5% of the individual consumer sample were based in Wales, which is above the corresponding share of the total UK and Welsh population (5.2% according to Census data, 2021[5]). Unfortunately, although we extended the data collection timeframe to two months in order to give more time to the pre-screened Welsh small business owners to access the study, only 2% of the participants were based in Wales in the final small business owner sample – a lower proportion than the corresponding population figure (4% according to 2021 government data[6]).

4. Results

In this section we first report the results of five conjoint analyses conducted on each of the legal issues included in the study (section 4.1). These analyses provide an understanding of the relative importance of each of the service attributes and of the ideal service provider for each legal issue. We then complement these results with those of a series of k-means cluster analyses that aim to unpack the heterogeneity of

[5] Census (2021) Available at: https://census.gov.uk/census-2021-results/phase-one-first-results (Accessed: 1 January 2023).

[6] Business population estimates for the UK and regions 2021: statistical release, Available athttps://www.gov.uk/government/statistics/business-population-estimates-2021/business-population-estimates-for-the-uk-and-regions-2021-statistical-release-html (Accessed: 1 January 2023).

consumers' and small business owners' evaluations of the hypothetical legal service providers in relation to each of the five legal issues (section 4.2).

4.1 Conjoint analysis by legal issue

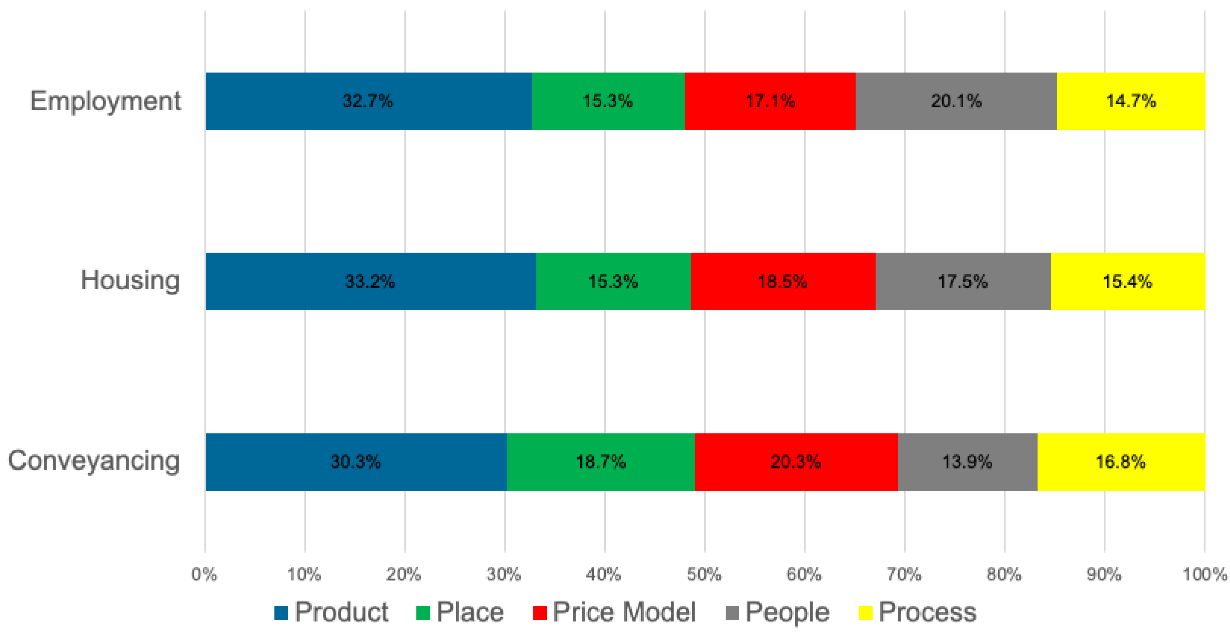
Through a series of conjoint analyses, we first calculated the relative importance of each attribute and then examined the average importance of each attribute level to identify respondents' ideal legal service provider for each of the five legal issues. We report these results separately for individual consumers and small business owners.

4.1.1 Individual consumer sample: Relative importance of the attributes and ideal service providers for conveyancing, employment, and housing

In order to connect this study to prior segmentation frameworks, which regarded the type of legal issue as an important segmentation variable (Oxera Consulting, 2011; LSB, 2018), as well as to expand the generalisability of the results to different areas of law, participants were asked to evaluate the service providers that could help them with different legal issues – one of three for individual consumers and two for small business owners.

Figure 4.1 presents the relative importance of the five service attributes emerging from individual consumers' evaluations of the different hypothetical legal service providers.

Figure 4.1 Relative importance of service attributes for individual consumers



It will be recalled from section 2.2 that each relative importance score, expressed as a percentage, measures how much difference each attribute could make in the total value consumers attach to the service, relative to the other attributes featured in the study. These scores can be compared within each legal issue as well as across different legal issues. This analysis reveals a series of interesting results. First, it highlights a strong prominence of the product attribute, which defined the extent to which the legal service provider trades off speed for clarity and involvement of the consumer in the provision of the service. This attribute receives a heavy weighting in consumers' evaluations of the providers, with importance scores almost twice as high as those for the other attributes across all three legal issues. Second, the other four attributes of the service seem to have similar importance. Third, and perhaps most interestingly, the distribution of these importance scores is very similar across the three legal issues examined, with the minor difference that the people attribute is regarded as more relevant for the two high-impact non-transactional legal issues (employment and housing) than for transactional ones (conveyancing). This last result suggests that the factors driving the decision to use a legal service provider do not differ as substantially across legal issues as segmentation frameworks based on this specific variable might imply.

Figure 4.2 presents the characteristics of the ideal service providers that emerged from the conjoint analysis for each legal issue. In the figure, attribute levels highlighted in green are those that increase the overall value ascribed to the service provider. Darker hues denote a stronger impact on the overall value.

Figure 4.2 Ideal legal service provider configurations for individual consumers

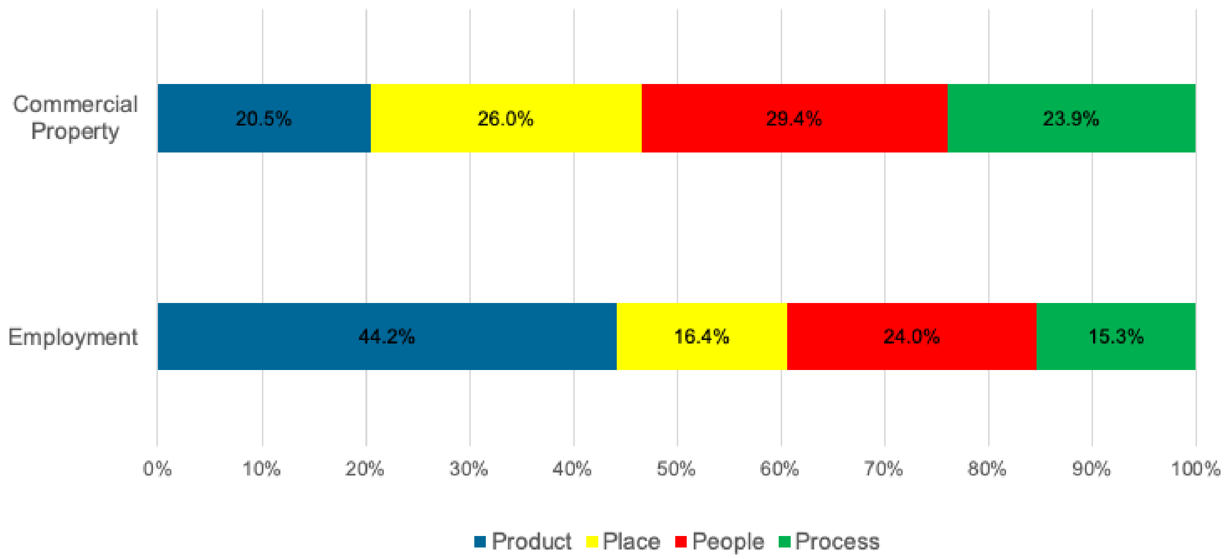
These ideal service configurations reveal a degree of convergence across the three legal issues on four out of the five attributes. With respect to product, individual consumers exhibit a very pronounced preference for legal service providers that provide a thorough explanation of the process and of the legal jargon, even if this comes at the expense of the speed at which the case progresses. With respect to process, consumers tend to strongly prefer regular updates to receiving updates upon request. With respect to people, consumers tend to attribute more value to specialisation than to generalist legal competences, although this preference is more pronounced for housing and employment than for conveyancing.

With respect to price model, consumers generally seem to attach more value to the transparency of a fixed price communicated at the outset, even though this may reduce the extent to which the service can be tailored to their needs. This preference is more pronounced for conveyancing than for housing and employment. Where these segments' ideal service providers diverge is with respect to the place attribute. In this case, consumers attribute more value to online provision for conveyancing, and more value to face-to-face provision for housing and employment.

4.1.2 Small business owner sample: Relative importance of the attributes and ideal service providers for employment and commercial property

In respect of the small business owner results, Figure 4.3 presents the relative importance of the four service attributes that emerged from this sample's evaluations of the different hypothetical legal service providers.

Figure 4.3 Relative importance of service attributes for small business owners



This analysis reveals interesting differences across the two legal issues. In the case of employment, we observe a strong prominence of the product attribute, which is almost as important in shaping the evaluations of the legal service providers as the other three attributes taken together, with people coming in second position. This pattern of results differs substantially from the one emerging for commercial property. For the latter, product seems to be the least relevant attribute, and we observe a much more even distribution of the relative importance scores across the four attributes. These results suggest that for small business owners, the specific legal issue faced may be an important predictor of how different service attributes are weighed within the decision to use a legal service provider. Product is more than twice as important for employment (a non-transactional legal issue) than for commercial property (a transactional legal issue), whereas place is 60% more important for commercial property than for employment. An examination of the ideal service providers for these two legal issues (presented in Figure 4.4) also reveals a number of significant differences.

Figure 4.4 Ideal legal service providers for small business owners

Employment

Product	Explain process/jargon well and approachable but slower
	Case moves quickly but no explanation of process/jargon
Place	Mainly online (emails/video calls/telephone)
	Mainly in person (face to face)
People	Specialised and with qualifications in this type of legal work
	Offer services in several areas of law, not specialised
Process	Updates only upon request
	Regular updates

Commercial Property

Product	Explain process/jargon well and approachable but slower
	Case moves quickly but no explanation of process/jargon
Place	Mainly online (emails/video calls/telephone)
	Mainly in person (face to face)
People	Specialised and with qualifications in this type of legal work
	Offer services in several areas of law, not specialised
Process	Updates only upon request
	Regular updates

Although for both legal issues consumers strongly prefer providers that offer regular updates to those who offer updates upon request (process attribute), and specialisation to generalist competences (people attribute), preferences for the levels of the other two attributes diverge. For employment legal issues, small business owners exhibit a pronounced preference for legal service providers that provide a thorough explanation of the process and of the jargon, even if this comes at the expense of the speed at which the case progresses; for commercial property issues, by contrast, speed is favoured over clarity (product attribute). This result may reflect the fact that commercial property issues are in general quite time-sensitive. For example, the business concerned may need to acquire the premises in order to operate, or may need to do so before a competitor. This consideration on the tight time constraints that small business owners typically face could also explain the next result, namely that providers whose services are offered exclusively online are preferred when it comes to commercial property issues (place attribute). Moreover – again, in line with time pressure being a major constraint affecting small business owners' decisions – while face-to-face service provision is valued more than online provision for employment issues, the drop in perceived value produced by a switch to exclusively online service provision would not be very high.

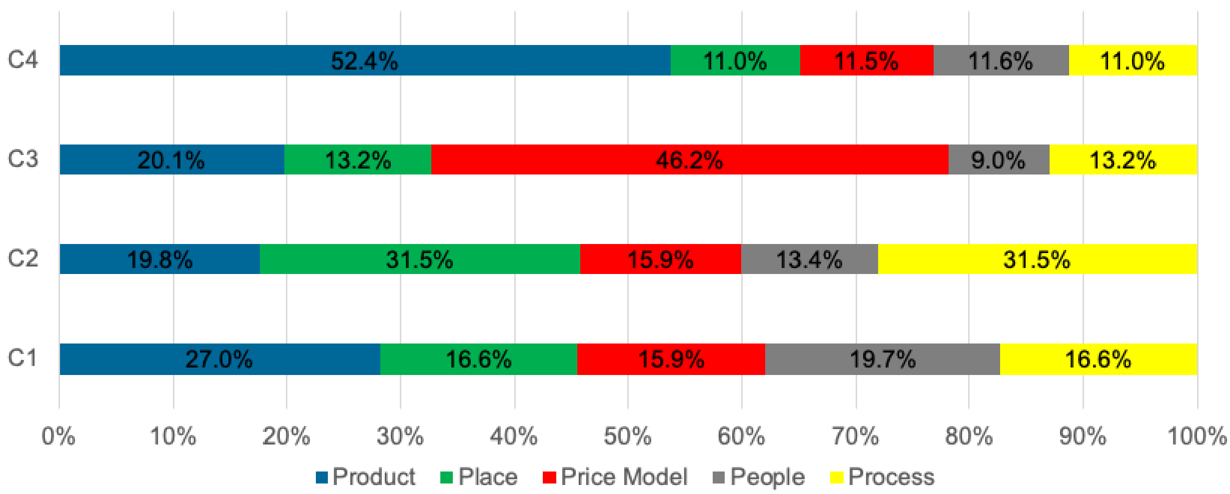
4.2 Segmentation analysis within each legal issue

We used the utility (part-worth) scores calculated in the previous conjoint analyses as input for a series of k-means cluster analyses to examine whether, within each of the five legal issues, groups of consumers and small business owners exhibit meaningful differences in their ideal type of legal service provider. We did so by clustering each respondent based on their individual utility for each attribute level, and we then examined whether demographic profiles differ across these groups. With regard to the relatively poor ability of demographics to predict actual consumer behaviour (Moore, 1980; Sandy, Gosling and Durant, 2013), while for each legal issue we did observe the existence of distinct segments characterised by pronounced differences with respect to preferences for different legal service providers, these did not represent significant differences in terms of demographics across segments. This observation provides further evidence of the limitations of relying on demographics and psychographic variables as a basis for meaningful market segmentation, as highlighted in the Phase 1 report.

4.2.1 Conveyancing

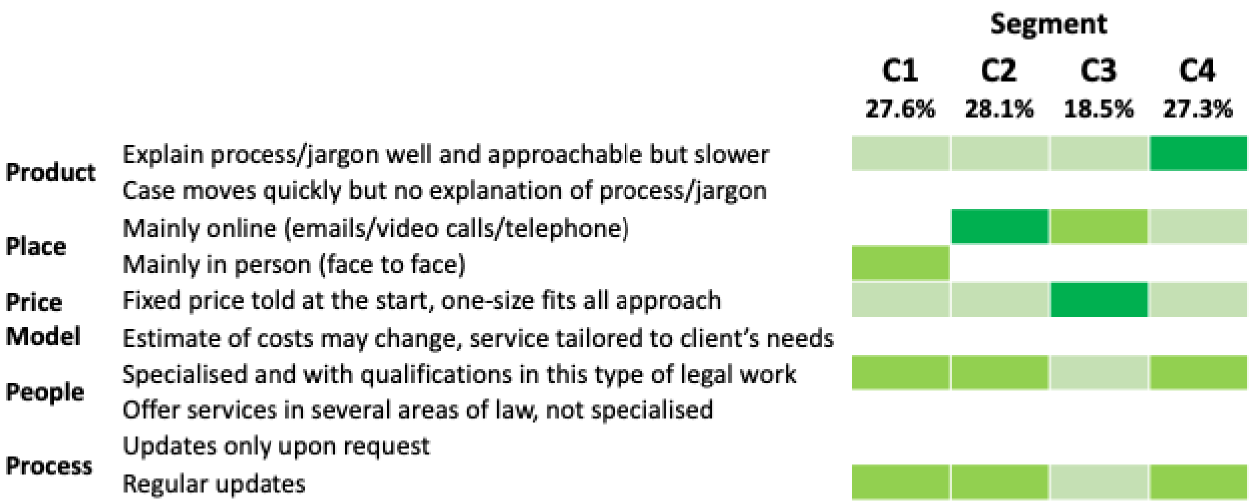
Analysing the conveyancing data revealed the existence of four distinct consumer segments (C1–C4). Figure 4.5 illustrates differences in the relative importance of the five service attributes across the four segments.

Figure 4.5 Relative importance of service attributes for the four conveyancing segments



A comparison of the relative importance of the attributes across the four segments reveals that different groups of individual consumers prioritise different attributes when deciding whether to use a legal service provider for their conveyancing issue. Segments C1 and C4 prioritised product over the other attributes, the latter almost twice as much (52.4%) as the former (27%); segment C2 prioritised place (31.5%); and segment C3 prioritised price model (46.5%). Figure 4.6 provides more detail on what specific levels of those attributes the four segments value most, and on the extent to which they do so compared with other attribute levels, together with the relative size of each segment as a percentage of the sample. Darker hues denote a more pronounced increase in the overall value perceived in a legal service provider if it offers the corresponding attribute level. In other words, the darkness of the hue reflects the extent to which the corresponding feature (e.g., online service provision) increases the perceived value of the service in comparison to the alternative feature for that specific attribute (e.g., face-to-face service provision).

Figure 4.6 Ideal legal service providers for the four conveyancing segments



In the first place, Figure 4.6 indicates that all four conveyancing segments generally exhibit a preference for legal service providers that are approachable and provide a thorough explanation of the process, even if this comes at the expense of the speed at which the case progresses (product attribute). This preference is much more pronounced for segment C4 than for the other three segments. Second, three of the four segments (C2, C3, and C4) prefer online to face-to-face provision (place attribute). This preference is much more pronounced for segment C2, whereas segment C1 attaches more value to providers that offer their services face to face. Third, all segments prefer a fixed price communicated at the outset, even if this comes at the expense of service customisation (price model attribute). However, this preference is very pronounced for segment C3 and much milder for the other three segments, for which offering the alternative variable cost estimate with more customisation would reduce perceived value to a relatively small extent. Finally, all four segments favour specialisation over generalist competences, and regular updates over updates upon request. In both cases, however, segment C3 is more indifferent between the two levels of each attribute.

Examining the results segment by segment, the following picture emerges:

- Segment C1 (27.6% of the sample), characterised by a balanced importance of all attributes, is distinct from other segments in their preference for face-to-face over online provision. More specifically, this segment attributes greater value to service providers that offer the reassurance of face-to-face provision, specialise in the legal matter at hand, and provide regular updates, with a milder preference for approachability over speed and fixed price for a one-size-fits-all approach over customisation at a variable price. Even in the case of a transactional legal issues such as conveyancing – for which almost three quarters of the sample favour, at least slightly, online service provision – this segment attaches considerable value to the possibility of meeting with their services provider face to face.
- Segment C2 (28.1% of the sample) is distinct for the high importance it attaches to place, accompanied by a strong preference for online over face-to-face service provision. This segment prioritises place over all the other service attributes when deciding whether to use a legal service provider, and attributes much more value than any of the other segments to the possibility of using the service online. Consumers in this sample also prefer providers that specialise in the legal matter at hand and provide regular updates, but they had a less pronounced preference for those offering a fixed price and more approachable over the alternatives examined.
- Segment C3 (18.5% of the sample) is distinct from other segments for the high importance attributed to price model, accompanied by a preference for fixed and transparent pricing and, possibly related, for online over face-to-face provision. This segment prioritises price model over all the other service attributes when deciding whether to use a legal service provider; moreover, it attaches more value than other segments to the possibility of having a fixed price communicated at the outset. This preference may reflect a combination of price consciousness and preference for transparency. Not surprisingly, this segment also exhibits a rather pronounced preference for providers that offer their services online rather than face to face. This could also be related to valuing transparency more, since price comparisons are easier online due to lower search costs (Lynch and Ariely, 2000).
- Segment C4 (27.3% of the sample) is characterised by a very strong prioritisation of product over all the other service attributes when deciding whether to use a legal service provider. All the other attributes matter to a much lesser extent. This segment exhibits the most pronounced preference for approachability and explanations over the speed at which the case progresses. Similar to other segments, consumers in this segment also value specialisation and regular updates, but exhibit a relatively mild preference for fixed price over customisation and online versus face-to-face provision. For this segment, differences in approachability are the prime determinant of the choice between different legal service providers, accounting for more than 50% of the differences in perceived value across different

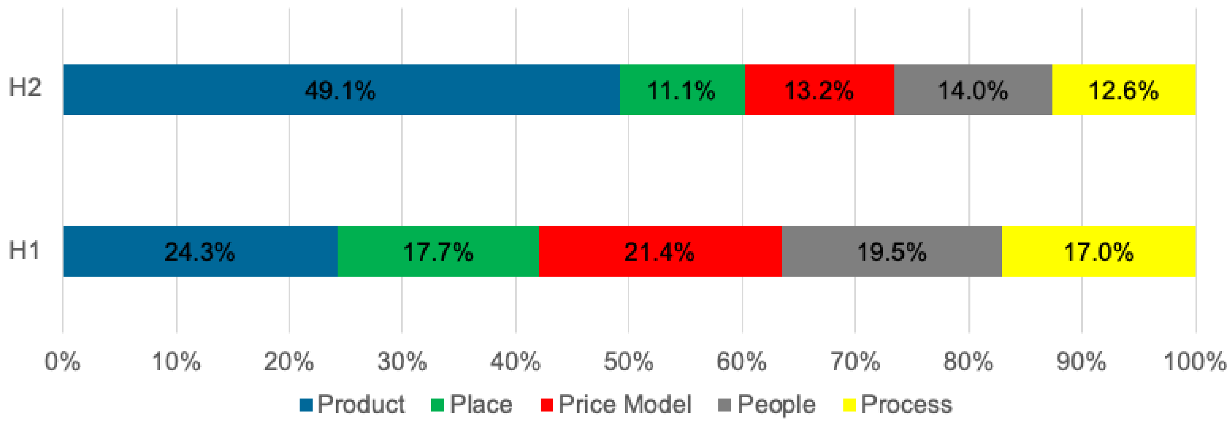
options. If the provider is not approachable and does not offer a thorough explanation of the process, it is unlikely that this segment will perceive high value in the legal services provision based exclusively on the other attributes.

The four segments did not exhibit significant differences in terms of several demographic variables (e.g., all four were approximately 25%/30% male, 10% were Welsh, 35% resided in rural areas, and 10% belonged to an ethnic minority). All segments regarded it as highly important that the services provider they would ultimately choose should be regulated. They were also similar in terms of several behavioural (e.g., prior use of legal service providers, resolution strategy, and search strategy) and psychographic variables. Segments C1 and C2 were slightly younger and more educated than segments C3 and C4, while segment C2 had a slightly higher income than segments C1 and C4. See Table 8.1 in the Appendix for an overview of the 24 variables examined to identify possible differences between the segments.

4.2.2 Housing

An analysis of the data on individual consumers who envisaged facing a housing issue revealed the existence of two distinct consumer segments (H1 and H2). Figure 4.7 below illustrates differences in the relative importance of the five service attributes across these two segments.

Figure 4.7 Relative importance of service attributes for the two housing segments



A comparison of the relative importance of the attributes across the two segments reveals that different groups of individual consumers prioritise different attributes when deciding whether to use a legal service provider for their housing issue. Whereas segment H1 attached similar importance to all five service attributes when evaluating a legal service provider, segment H2 exhibited a very strong prioritisation of the product attribute, which accounted for almost 50% of the differences in perceived value across the providers.

Figure 4.8 provides more detail on the specific levels of the attributes the two segments value most, as well as on the extent to which they do so compared with other attribute levels, together with the relative size of each segment as a percentage of the sample. Darker hues denote a more pronounced increase of the overall value perceived in the service configuration if it features the corresponding attribute level. In other words, the darkness of the hue signals the extent to which the corresponding feature (e.g., online service provision) increases the perceived value of the service in comparison to the alternative feature for that specific attribute (e.g., face-to-face service provision).

Figure 4.8 Ideal legal service providers for the two housing segments

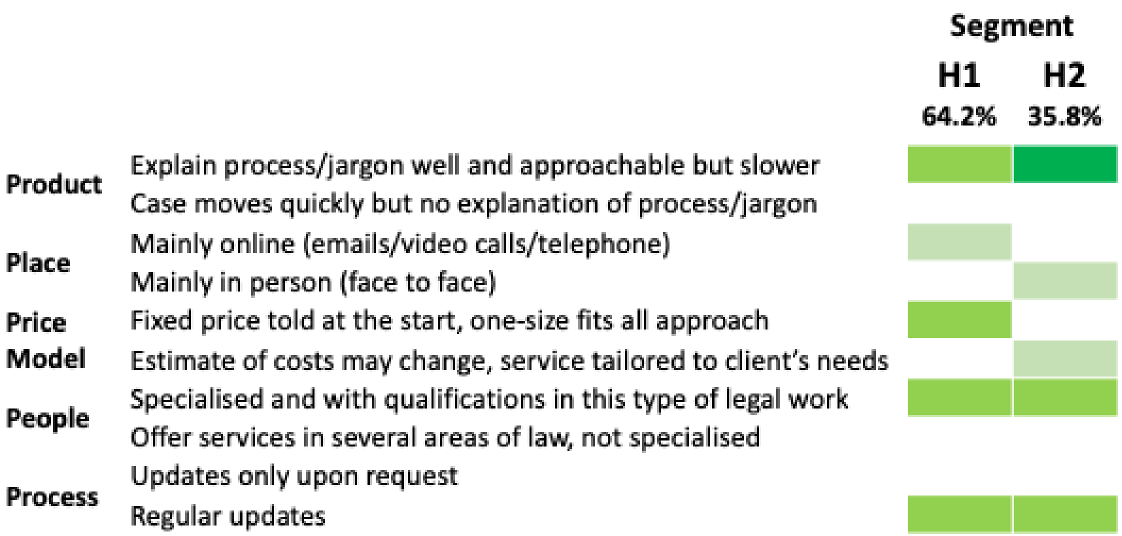


Figure 4.8 indicates that, in overall terms, both housing segments exhibit a preference for legal service providers that are approachable and provide a thorough explanation of the process, even if this comes at the expense of the speed at which the case progresses (product attribute). This preference is more pronounced for segment H2. Both segments favour specialisation over generalist competences, and regular updates over updates upon request, and they do so to a similar degree. The preferences of the segments diverge with respect to the place and price model attributes; segment H1 favours online over face-to-face provision, and a fixed price communicated at the outset, while segment H2 exhibits the opposite pattern of preferences (face-to-face provision and variable price for a customised service).

Examining the results segment by segment, the following picture emerges:

- Segment H1 (64.3% of the sample) is characterised by a balanced consideration of all service attributes when evaluating legal service providers. Consumers in this segment attribute more value to service providers that are approachable and explain the process and jargon (although less than segment H2). Moreover, they have no problem with receiving the service online (there is a small increase in perceived value for providers that offer their services online) and prefer the transparency of a fixed price, even with a one-size-fits-all approach.

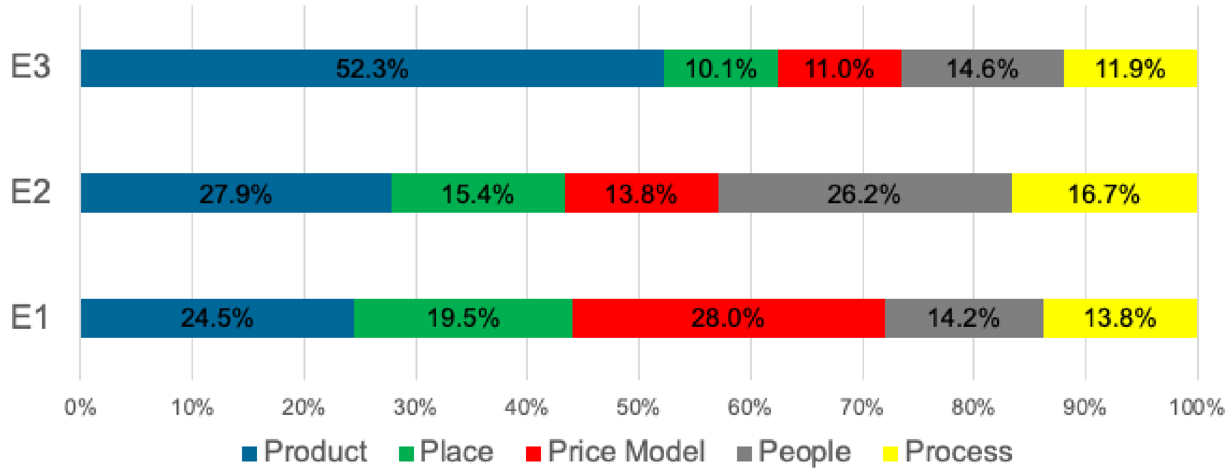
- Segment H2 (35.8% of the sample) very strongly prioritises product over all the other service attributes when deciding whether to use a legal service provider and exhibits the most pronounced preference for approachability and explanations over the speed at which the case progresses. The other attributes matter to a much lesser extent. Similar to segment H1, consumers in segment H2 also value specialisation and regular updates. However, they differ from segment H1 in that they attribute more value to face-to-face provision and to customisation of the service – even if this does not allow for the transparency of a fixed price communicated at the outset. Similar to segment C4 (conveyancing), for consumers in this segment approachability is the prime determinant of the choice between different legal service providers, accounting for almost 50% of the differences in perceived value across different options. In this case, moreover, providers who are not approachable and do not offer a thorough explanation of the process are unlikely to be perceived as high value based exclusively on the other attributes. Interestingly – and reflecting a difference between transactional and non-transactional legal issues – segment H2 differs from segment C4 in that it exhibits different preferences with respect to the place and price model attributes.

The two segments did not exhibit significant differences on the 24 demographic, psychographic, and behavioural variables examined, with the exception of age: segment H1 is slightly older than segment H2. Table 8.2 in the Appendix presents an overview of the different variables examined.

4.2.3 Employment

An analysis of the employment data revealed the existence of three distinct consumer segments (E1–E3). Figure 4.9 presents differences in the relative importance of the five service attributes across the three employment segments.

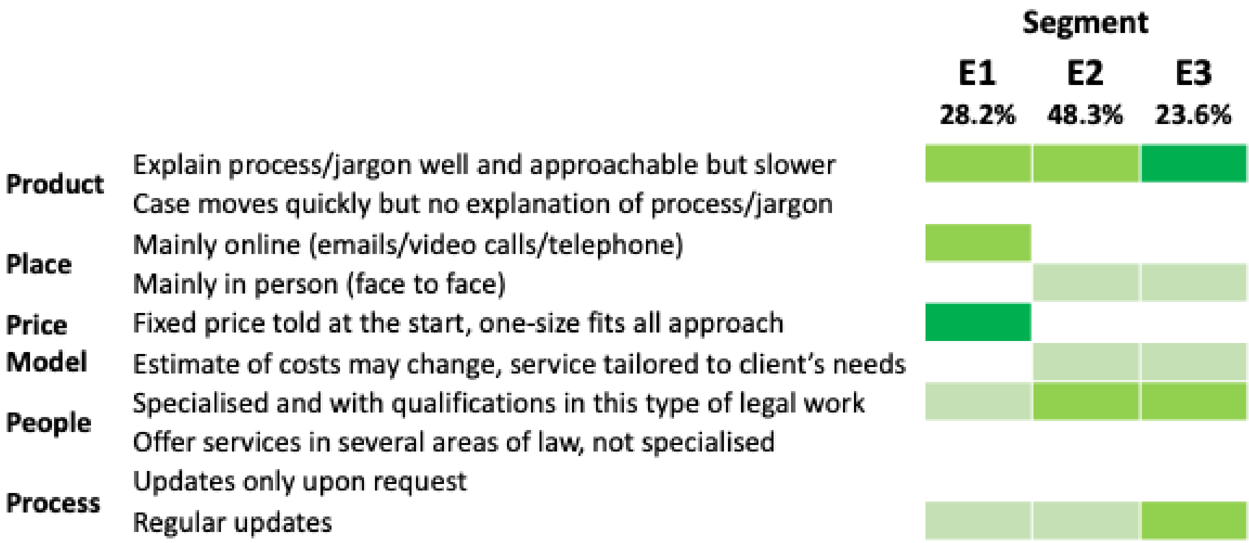
Figure 4.9 Relative importance of service attributes for the three employment segments



A comparison of the relative importance of the attributes across the three segments reveals that different groups of individual consumers prioritise different attributes when deciding whether to use a legal service provider for their employment issue. Segment E1 prioritised price model (28.0%), product (24.5%), and place (19.5) when evaluating the legal service providers; in particular, consumers in this segment attached more value to price model and place than the other two segments. Segment E2 prioritised product (27.6%) and people (26.2%), the latter much more than the other two segments, while segment E3 prioritised product (52.3%) over all other attributes.

Figure 4.10 presents information on the specific levels of those attributes to which the three employment segments attached most value and on the extent to which they do so compared to other attribute levels – together with the relative size of each segment as a percentage of the sample. Darker hues denote a more pronounced increase in the overall value perceived in the service configuration if it features the corresponding attribute level. In other words, the darkness of the hue reflects the extent to which the corresponding feature (e.g., online service provision) increases the perceived value of the service in comparison to the alternative feature for that specific attribute (e.g., face-to-face service provision).

Figure 4.10 Ideal legal service providers for the three employment segments



The results presented in Figure 4.10 indicate that, in overall terms, all three employment segments exhibit a preference for legal service providers that are approachable and provide a thorough explanation of the process, even if this comes at the expense of the speed at which the case progresses (product attribute). This preference is more pronounced in the case of segment E3.

All segments favour specialisation over generalist competences, and regular updates over updates upon request – although to slightly different extents. The preferences of the segments diverge with respect to the place and price model attributes. Segment E1 favours online over face-to-face provision, and a fixed price communicated at the outset. Segment E2 exhibited an opposite, though less pronounced, pattern of preferences (face-to-face provision and variable price for a customised service).

Examining all the results segment by segment, the following picture emerges:

- Segment E1 (28.2% of the sample) regards the price model and place attributes as more important than the other two segments and differs from them in terms of their ideal services provider with respect to these two attributes. Consumers in this segment attach a high value to the transparency of a fixed price and to the possibility of receiving the service online. They are similar to the other segments in their preference for approachability, specialisation, and regular updates; however, these factors weigh less in their decision to use a legal service provider.
- Segment E2 (48.3% of the sample) considers the people attribute as more important than the other two segments, followed by product. Specialisation and approachability define the ideal service provider for this segment, which also prefers the service to be customised, even though its cost is variable, and favours face-to-face provision over online provision.
- Segment E3 (23.6% of the sample) has an ideal service provider similar to that of segment E2; however consumers in segment E3 much more strongly prioritise the product attribute over all the other service attributes when deciding whether to use

a legal service provider. This segment ascribes a higher value to approachability and explanations than to the speed at which the case progresses.

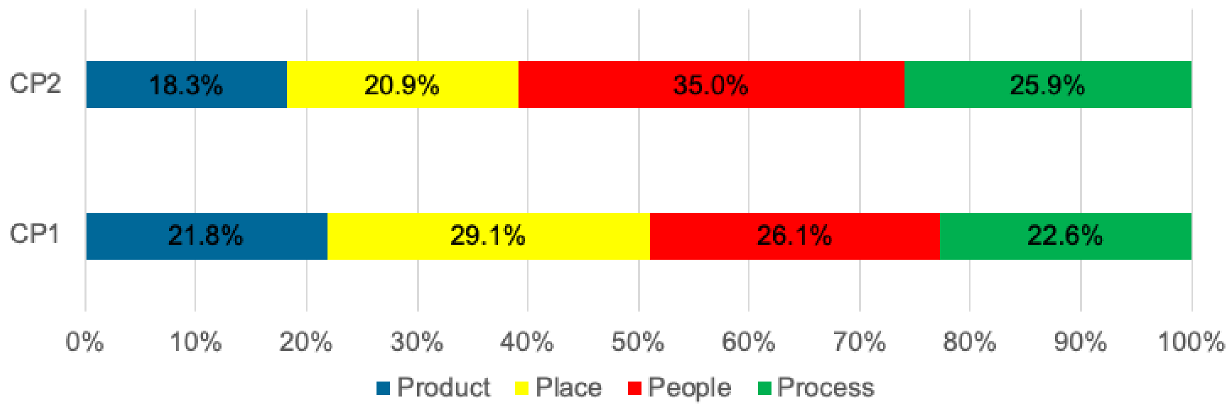
Interestingly, when it comes to employment issues, almost three quarters of the individual consumer sample exhibit a preference for providers that offer their services primarily on a face-to-face basis; moreover, they value the option of having a transparent fixed price communicated at the outset much less than the option of a tailored service at a cost that is subject to change.

The three segments did not exhibit significant differences on the demographic, psychographic, and behavioural variables examined; the exception was gender, as segments E1 and E2 contain a higher proportion of male consumers than segment E3. See Table 8.3 in the Appendix for an overview of the different variables examined.

4.2.4 Commercial property

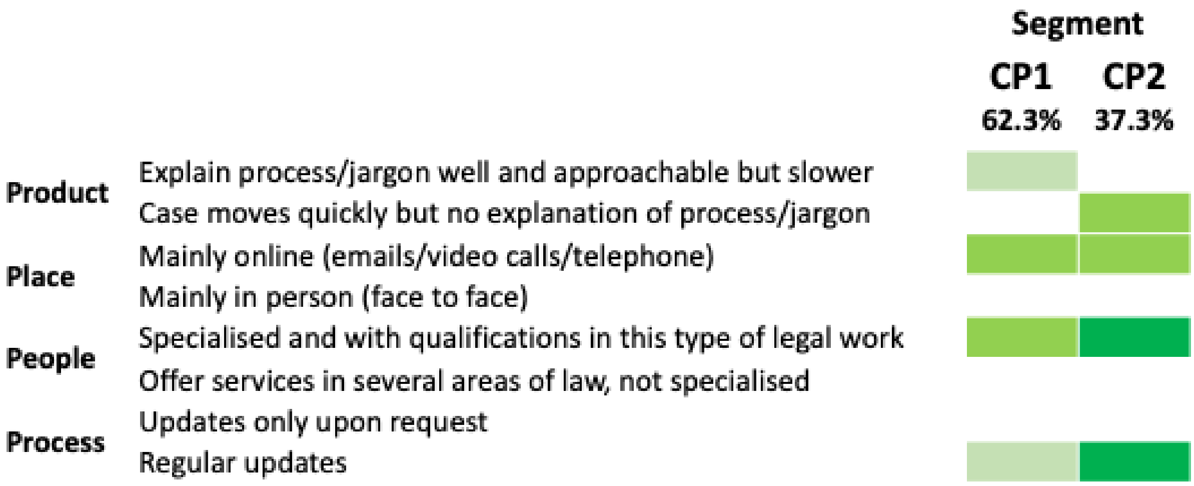
The analysis of the commercial property data collected on the small business owner sample revealed the existence of two distinct segments (CP1 and CP2). Figure 4.11 illustrates differences in the relative importance of the four service attributes across the two segments.

Figure 4.11 Relative importance of service attributes for the two commercial property segments (small business owners)



An interesting result from the relative importance analysis is that small business owners generally seem to attach less weight to the product attribute than individual consumers do; across all three legal issues examined, individual consumers generally attached more relative importance to product. Across the two commercial property segments, CP1 exhibits a generally uniform distribution of relative importance across the four service attributes. This indicates that consumers in this segment weigh these factors to a similar degree when choosing their services provider. Segment CP2 prioritises the people factor more than any other attribute, followed by process. Figure 4.12 below presents information on the specific levels of those attributes that the two segments value the most and on the extent to which they do so compared to other attribute levels – together with the relative size of each segment as a percentage of the small business owner sample.

Figure 4.12 Ideal legal service providers for the two commercial property segments (small business owners)



The results presented in Figure 4.12 indicate that the two commercial property segments differ in terms of their preferences for the product attribute. Segment CP1, similar to the individual consumer segments, slightly prefers providers that are approachable and explain the process, even if slower; however, segment CP2 attaches much more value to providers that favour speed, even at the expense of understanding the process. Both segments favour online provision over face-to-face provision, but segment CP2 attaches much more value to receiving regular updates and to the specialisation of the provider than segment CP1 does.

If all the above results are combined, the following segment characterisation emerges:

- Segment CP1 (62.3% of the sample) attaches a similar weight to all four attributes when evaluating legal service providers for a commercial property issue. Consumers in this segment value specialisation, the provision of online services, and to a lesser extent, regular updates. Similar to the individual consumer segments, but different from the other commercial property small business owner segment, they attach slightly more value to providers that are approachable and explain the process than to providers that favour speed over approachability.

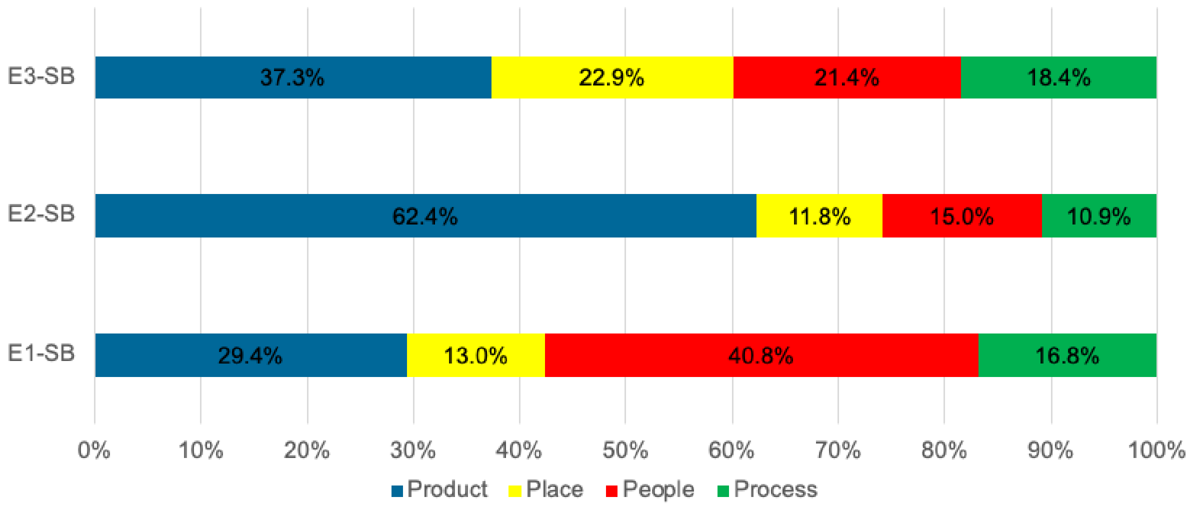
- Segment CP2 (37.3% of the sample) attaches more weight to the people and process attributes than to the other attributes when evaluating legal service providers. Interestingly, product is the least important attribute for these consumers. Their ideal services providers offer speed of case progression over approachability and process explanation, a preference distinct from that of any segments identified so far. This segment also prefers online service provision to face-to-face provision, but attaches a very high value to specialisation and regular updates.

The two segments did not exhibit significant differences on the 29 demographic, psychographic, and behavioural variables examined. See Table 8.4 in the Appendix for an overview of these variables.

4.2.5 Employment (small business owners)

The analysis of the employment data collected on the small business owner sample revealed three distinct segments (E1SB–E3SB). Figure 4.13 below illustrates differences in the relative importance of the four service attributes across these three segments.

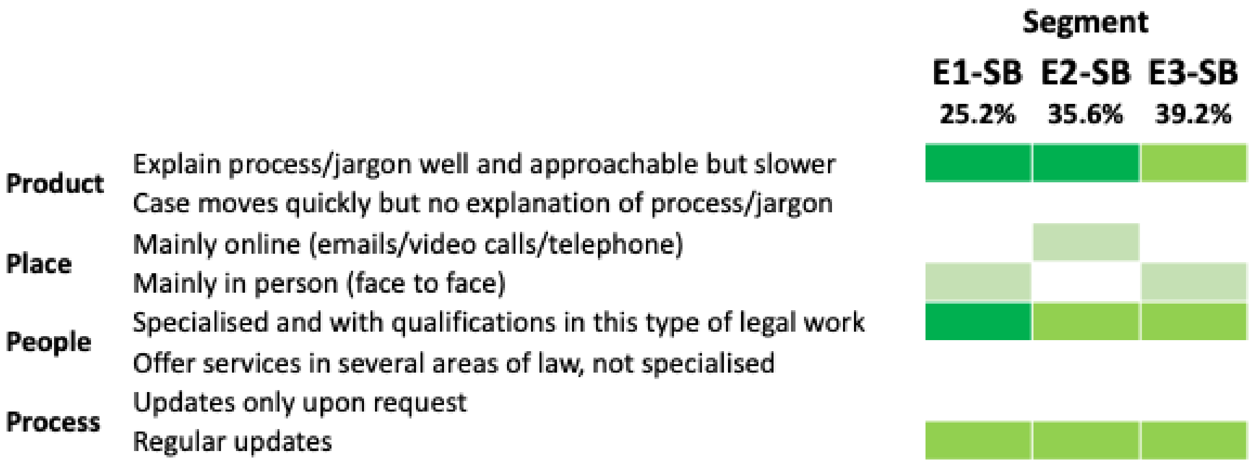
Figure 4.13 Relative importance of service attributes for the three employment segments (small business owners)



A comparison of the relative importance of the attributes across the three segments reveals that different groups of small business owners prioritise different attributes when deciding whether to use a legal service provider for their employment issue. Segment E1SB prioritised people (40.8%) much more than the other two segments, followed by product (29.4%) when evaluating the legal service providers. Segments E2SB and E3SB prioritised product – the former much more so than the latter (37.3%). By contrast, the other attributes received similar – though lower – weightings with regard to evaluating the different legal service providers. In the case of employment issues, small business owners generally attach significant weight to the product attribute, which is more similar to what we observed for the legal issues examined for individual consumer segments than for the commercial property segments.

Figure 4.14 below presents information on the specific levels of those attributes that the three segments value the most, together with the relative size of each segment as a percentage of the small business owner sample.

Figure 4.14 Ideal legal service providers for the three employment segments (small business owners)



The results presented in Figure 4.14 indicate that, in overall terms, all three employment segments exhibit a preference for legal service providers that are approachable and provide a thorough explanation of the process, even if this comes at the expense of the speed at which the case progresses (product attribute). This preference is very pronounced for segments E1SB and E2SB, but also fairly strong for segment E3SB. All three segments favour specialisation over generalist competences – segment E1SB more so than the other two – and regular updates over updates upon request to a similar degree. The preferences of the segments diverge with respect to the place attribute; segment E2SB is content with online provision, while the other two segments prefer face-to-face provision.

Examining all the results segment by segment, the following picture emerges:

- Segment E1SB (25.2% of the sample) prioritises the people attribute and attaches a very high value to specialisation when evaluating a legal service provider. Consumers in this segment strongly favour approachability and process explanation over speed (product is the second most important attribute); moreover, they prefer regular updates and face- to-face provision to online provision – although these attributes (process and place) were more marginal in their evaluation.

- Segment E2SB (35.6% of the sample) is to some extent similar to segment E1SB when it comes to preferring approachability and process explanation to speed; however, this factor is twice as important in affecting their decision to use a legal service provider. The other three attributes are much less important. Interestingly, although consumers in this segment also value specialisation and regular updates, they generally prefer their service to be provided online rather than face to face.
- Segment E3SB (39.2% of the sample) also prioritises the product attribute, but regards the other three attributes as much more important than segment E2SB does. The ideal service provider for consumers in this segment is characterised by approachability and process explanation rather than speed; and by specialisation, regular updates, and face-to-face rather than online service provision.

The three segments did not exhibit significant differences on the demographic, psychographic, and behavioural variables examined, with the exception of gender: segments E1SB and E3SB have a slightly higher proportion of male small business owners than segment E2SB. See Table 8.5 in the Appendix for an overview of all 29 variables examined.

5. Discussion

- The results of this value-based segmentation analysis of the legal services market offer several insights that can inform the decisions and strategies of legal service providers, as well as the directions offered by regulators to increase the likelihood that consumers' legal needs are met. The analysis revealed that several distinct segments exist in the market. These segments value the attributes of the legal service examined in the study to different extents and have different ideal service providers. The results suggest that strengthening the quality of the legal services supply on those specific attributes and designing legal services by keeping in mind which levels of those attributes are more likely to enhance the perceived value of the service, could increase the likelihood that these segments will access legal services. In the following sections, we summarise the main results for each service attribute and contextualise them in relation to the results of earlier studies on consumers and legal service providers.

5.1 Product

Across all segments and legal issues, the product attribute emerged as one of the most important in the decision to use a legal service provider. This prominence was observed both for individual consumers and for small businesses, but for the latter only with respect to non-transactional issues (i.e., employment). For each of the legal issues examined, with the exception of commercial property, there was one segment (i.e., C4, H2, H3, E2SB) for whom this attribute was much more important than any of the others, as it explained more than 50% of consumer preferences for different providers.

The product attribute traded off the speed at which the case progresses for an emphasis on approachability and explanation of the process and the jargon to the client. In most cases, consumers preferred service providers that offered the latter rather than the former; the only exception was commercial property for small business owners (and even in this case, this preference was expressed primarily by segment CP2).

This set of results is consistent with studies on satisfaction with legal services which found that the clarity of information provided by legal service providers is an important factor affecting consumers' level of satisfaction (Williams, 2012; Natraj *et al*., 2017; SRA, 2019; Legal Services Consumer Panel (LSCP), 2020a). Importantly, earlier studies have also emphasised the need to improve the communication methods of legal service providers to enhance consumers' understanding of the service and their level of engagement.

Many legal service providers believe their communication to be clear and effective (LexisNexis, 2015; Optimisa Research, 2016; IFF Research, 2017). However, nearly half of the respondents in a recent survey of dissatisfied consumers reported wanting information about the legal process. However, firms' perceptions of these expectations were not very accurate: only 23% of the firms surveyed in the same study reported that consumers' top five key expectations would include a clear explanation of the legal process (Natraj *et al*., 2017).

One obvious way for providers to strengthen the product attribute is to make the process and jargon clearer. In addition to that, however, legal service providers can promote this aspect of service provision more explicitly by emphasising their approachability and how much they care about ensuring that the consumer is able to understand the various elements of the legal process. Interventions like these could assist in making consumers feel more confident when assessing the quality of the service received, increasing their reliance on objective information about the legal process over less diagnostic cues such as the 'professional' appearance of the provider's website, the provider's credentials, the empathy of the staff, reviews and recommendations, and gut feelings (LSCP, 2020a; LSCP, 2021a; 2021b).

The complexity of legal issues affects consumers' perceptions of self-efficacy, legal confidence, and accessibility to justice (YouGov, 2019). A lack of understanding of the legal process has also been identified as a major barrier reducing consumers' access to justice, since consumers' general lack of knowledge of the legal process limits their ability to make informed choices and decisions and affects their perceptions of the legal process. Several studies have recommended the use of simplified communication to address this barrier (Hodge Jones & Allen, 2015; Optimisa Research, 2016; IFF Research, 2018; YouGov, 2019).

5.2 Place

- The results on the place attribute reveal that this is not the most important one in determining the decision to use a legal service provider, except for segments E1 (individual consumers) and CP1 (small business owners). Different segments attribute more value to different levels of the attribute. The majority of conveyancing and commercial property segments, as well as the largest of the two housing segments, preferred providers that generally offer their services online, whereas the majority of employment segments (both for individual consumers and small business owners) preferred providers that generally offer their services face to face.

The use of online channels has often been seen as a possible way to address the problem of 'legal deserts' (i.e., areas of law or physical locations with limited service provision), an important barrier to access to justice, which leaves many consumers with their legal needs unmet (SRA, 2021; The Law Society, 2022a; 2022b). However, the shift in the provision of legal services from physical and face-to-face interactions to online and digital channels could potentially leave behind those who are digitally excluded (SRA, 2021; The Law Society, 2022b). Although the sample used in the study was recruited from an online panel – and therefore relatively digitally savvy – we observe that for a large section of non-transactional high-impact legal issues, consumers still favour face-to-face provision.

The results of our segmentation analysis reveal that consumers exhibit different patterns of preference for the two channels (i.e., face-to-face and online provision). Whereas for more transactional legal issues such as those related to conveyancing and commercial property, offering online (against face-to-face) provision is perceived as adding value, for some consumers facing non-transactional legal issues – those related to employment in particular, but also to some extent to housing – shifting to digital channels may reduce the value perceived in the offer of service a legal service provider. The qualitative in-depth interviews conducted in Phase 2 of the research project revealed that face-to-face contact is an important factor for building trust in the legal service provider. Perhaps these results suggest that trust may be a more influential factor for non-transactional legal issues.

One possible reason for this observed difference is that face-to-face interactions allow legal service providers to reassure confused or uncertain consumers (Community Research, 2021; IRN Research, 2021; The Law Society, 2022b), whereas online interactions may limit service providers' ability to detect consumers' distress (The Law Society, 2022a). These affective aspects of the service provision are likely to be more influential for complex and high-impact issues such as employment and housing, and less so for more routine legal issues. The use of artificial intelligence technologies to detect consumers' emotional reactions (e.g., distress) during online interactions could be a promising direction to enhance the value of online legal service provision and increase the uptake of online legal services generally, as well as specifically in areas of law where these emotional aspects are particularly important.

5.3 Price model

The price model attribute, which related to fixed versus variable pricing, was included only in the hypothetical legal service providers' descriptions presented to individual consumers. Surprisingly, with the exception of one conveyancing segment and one employment segment, this attribute was not deemed particularly important when traded off for service customisation in determining the decision to use a legal service provider.

- This specific result resonates with a number of mixed findings that have emerged from recent empirical studies. For example, Matos (2018) found that most consumers (85%) wanted price information when making their decision, with price as the dominant factor; whereas other studies consistently revealed that price was important, but not the most important factor when consumers choose and use legal services (IRN Research, 2020; LSCP, 2021a; 2021b).

In our conjoint study, the price model attribute compared the option of having a fixed price communicated at the outset for a one-size-fits-all approach to the service provision, with the option of a service tailored to the client's needs, but with price subject to change. Overall, consumers tend to attach more value to the former option, with this preference being less pronounced for housing and employment; some segments (H2, E2, E3) slightly favour the service being tailored to their specific needs over transparent fixed pricing.

Legal service providers seem to be aware that providing a clear indication of costs is what consumers value the most (LexisNexis, 2016), and the level of price transparency has substantially increased since the 2016 CMA Market Study (CMA, 2020; IRN Research, 2020; LSCP, 2020b). The findings of a recent report reveal that 68% of surveyed law firms now publish pricing information, such as price range and hourly or fixed prices, on their website – at least for those areas of practice covered by the

Transparency Rules (SRA, 2019). However, excessive cost and lack of cost transparency are still prominent in first-tier consumer complaints (SRA, 2020) and constitute the target of approximately 15% of all complaints to the Legal Ombudsman (see 2018–2021 data). In addition, the most recent Tracker Survey study indicates that 42% of consumers cannot find upfront information on prices, or that prices are presented in a confusing manner (25%), and that consumers have to find out about price information through direct contact with providers (LSCP, 2021a; 2021b).

One issue potentially preventing fixed-price services from being offered is providers' concern about the possible negative effects of transparent fees, which may promote shop-around behaviour among clients and increase price competition. It is worth noting that the segments which preferred online to face-to-face provision were also those which preferred a fixed transparent price.

5.4 People

The analysis of the people attribute revealed that the relative importance of this element of the service is generally higher for small business owners than for individual consumers, for whom it is a very important predictor of provider choice in the case of commercial property issues; moreover, it is the most important attribute for one of the employment segments. This is also true for one of the individual consumer employment segments. Small business owners and individual consumers are in agreement on what they prefer with respect to this specific attribute. When designing the conjoint task, the levels of the people attribute were chosen on the assumption that some consumers would value generalist competences in multiple areas of law when deciding whether to use a legal service provider, whereas others would prefer specialisation in one area of law. This hypothesis was motivated by the conjecture that holding expertise in multiple areas of law would be a strength similar to that sought among general practitioners when seeking help for a medical condition. Instead, the results demonstrate a very homogeneous pattern. All segments prefer legal service providers who present themselves as specialists rather than as covering different areas of law, although the magnitude of this difference in perceived value varies across legal issues and segments. It seems important to address this market need by emphasising and reminding consumers that legal service providers have the skills required by their profession, even if the firm is positioned as generalist. It is also important that legal service providers provide tangible reminders of their specialised qualifications, as well as their continuing professional development activities.

5.5 Process

The process attribute is the one with the lowest relative importance, both for small business owners and individual consumers, across all the legal issues examined.

Similar to the people profile, we observed a uniform pattern across all segments, indicating a preference for regular over on-demand updates. Legal service providers seem to be aware of this preference, as a study conducted by LexisNexis (2015) found that 81% of lawyers believed they provided regular updates on the legal process throughout their service. However, only 61% of clients agreed. Other studies have reported disparities between consumers' expectations and solicitors' perceptions on progress updates. Consumers want regular communication about progress (62%), yet 55% of surveyed consumers were dissatisfied because their solicitors failed to update them, 47% were dissatisfied about delays, and 37% were dissatisfied because their solicitor failed to keep them informed (Natraj *et al*., 2017). These results resonate with consumers who report that in their interaction with a legal service provider, they often feel a need to proactively monitor or chase them for information and updates on their cases. Moreover, consumers who do so report a high level of frustration with the service they receive (Ipsos Mori, 2016).

6. Conclusion

This report contains the results of the first value-based segmentation of the legal market in England and Wales. On the basis of each respondent's evaluations of different hypothetical legal service providers, a conjoint analysis allowed us to extrapolate both which attributes they considered more or less important in their decision to use legal services and the characteristics of their ideal service providers. This information was then used as the basis for the classification of consumers into homogeneous segments by means of a cluster analysis.

Our analysis revealed that several distinct segments exist in the market for legal services. These segments attach different values to the attributes of the legal service examined in the study and thus have their own unique ideal service providers.

For example, for each of the legal issues examined – with the exception of commercial property – one segment applied a disproportionate weight to the product attribute when deciding whether to use a legal service provider. More specifically, these segments attributed high value to approachability and the explanation of the process and the jargon to the client, even if this came at the expense of the case completion speed. Even in those segments that considered the product attribute to be as important as other attributes, approachability was largely preferred to the speed at which the case progresses. These results suggest that emphasising and communicating the aspect of approachability may be an effective strategy to meet the needs of consumers across a variety of legal services.

Consumer attitudes toward place and price model were more nuanced. With respect to place, we observed a preference for online provision for transactional legal issues, as well as for part of the housing sample. Interestingly, the majority of employment segments (both for individual consumers and small business owners) preferred providers that generally offer their services face to face. With respect to price model, we observed two individual consumer segments (one in the conveyancing analysis and one in the employment analysis) whose decision to use a legal service provider was influenced primarily by this attribute, with a strong preference for a fixed price communicated at the outset, even with the expectation of reduced service tailoring. However, other segments did not attribute the same importance to price model and (particularly for housing and employment) were willing to trade off less certainty about the price for a higher degree of service customisation.

The people attribute is more predictive of small business owners' decisions to use a legal service provider than of individual consumers' decisions. However, irrespective of its importance relative to other attributes, all segments tend to prefer providers that have a specialised rather than a generalist positioning. Finally, the process attribute is the least prominent factor affecting consumers' decision to use a provider. However, preferences are also relatively uniform in the case of this attribute, and regular updates are favoured over updates on demand.

These results have important implications for the legal services industry. Strengthening the legal services supply with respect to the attributes that are more predictive of consumers' decisions to use a legal service provider – both in terms of design and effective communication – is an important step. So, too, is designing the legal services offer by taking into account which attribute combinations are more likely to enhance the perceived value of the service. Both steps mentioned above could ultimately increase the likelihood that consumers belonging to these segments will access legal services.

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