

Solicitors  
Regulation  
Authority

# SRA: Corporate Strategy Benchmarking 2024

---

Quantitative report

October 2024

**Thinks**  
— Insight & Strategy —

# Contents

<b>1</b>	Executive summary	<a href="#">Page 3</a>
<b>2</b>	Objectives and methodology	<a href="#">Page 15</a>
<b>3</b>	Experience of using legal services	<a href="#">Page 21</a>
<b>4</b>	Awareness and perceptions of regulators	<a href="#">Page 26</a>
<b>5</b>	Confidence and trust in legal services	<a href="#">Page 34</a>
<b>6</b>	SRA's role in confidence and trust	<a href="#">Page 44</a>
<b>7</b>	Deep dives into the factors driving confidence and trust	<a href="#">Page 56</a>
<b>8</b>	The future	<a href="#">Page 118</a>
<b>9</b>	Conclusions	<a href="#">Page 123</a>
<b>10</b>	Appendix and additional insights	<a href="#">Page 127</a>

# Executive summary

# Overview of the research

## Research background

In November 2023, the Solicitors Regulation Authority (SRA) published its 2023-2026 strategy, with the mission to drive confidence and trust in legal services.

Following the publication of the strategy, the SRA commissioned Thinks Insight & Strategy to conduct research into key audiences' perceptions of progress on delivering the strategy and how the SRA can best achieve the strategy's mission to drive confidence and trust in legal services.

## Methodology\*

Thinks have conducted a multi-stage research programme, engaging with five key audiences:

- Legal Professionals
- Consumers
- SME Leaders
- Opinion Leaders
- MPs / Members of Senedd

This research has consisted of four key stages:

- Scoping with SRA staff and board
- Exploratory qualitative research phase
- Measuring quantitative research phase
- Consolidation and delivery

## Considerations when reading this report

Results in this report are generally positive, particularly in relation to levels of confidence and trust. Overall, the **mere existence of legal regulators enforces confidence and trust**. However, low awareness of the SRA twinned with consumer assumptions that all providers are regulated means the SRA's unique impact on confidence and trust levels for this audience is more difficult to unpick than for others. There were also some outstanding pain points among users of legal services (relating to cost and value) and legal professionals (relating to investigation and enforcement) which may impact their views and perceptions.

Perceptions of confidence and trust are closely aligned, and exploratory insights found that these terms are likely to be **considered interchangeable** for many (as well as crucial for the sector). When differentiated – and in the context of legal services – confidence is more likely to be linked to **technical ability and expertise**, whereas trust is more likely to be linked to **integrity**.

From our experience, Opinion Leaders and Policymaker audiences are more **reluctant to endorse** a sector they do not have firsthand experience in, and instead prefer to remain impartial. As such, they are less likely to provide 'positive' ratings for subjects they have **lower knowledge** of and more likely to indicate neutral sentiment or uncertainty.

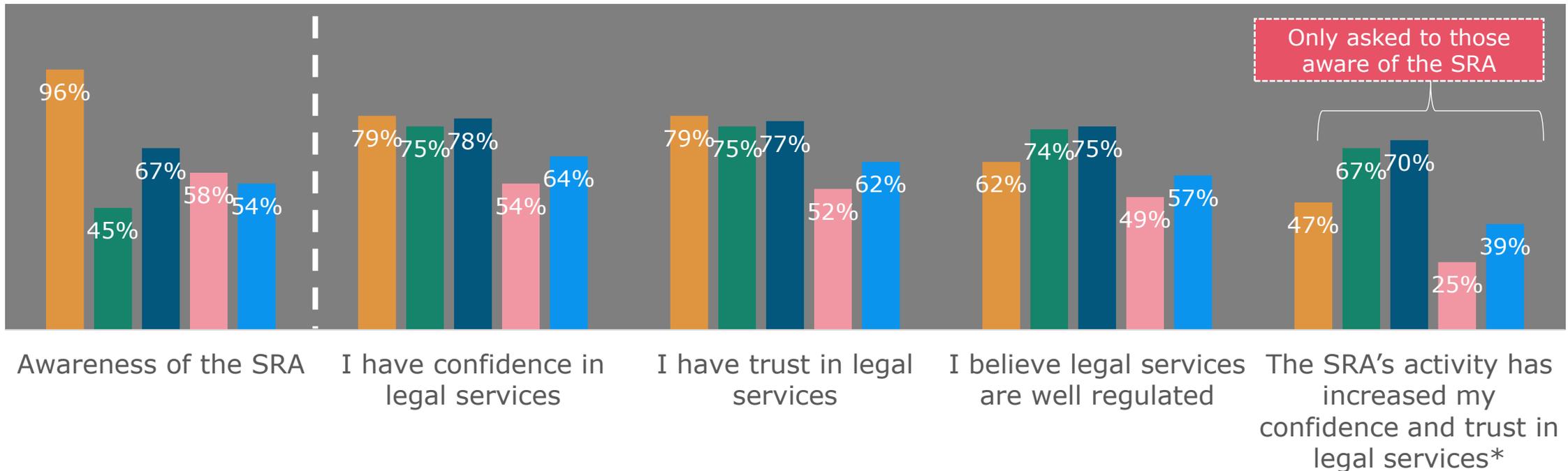
The public, on the other hand, are more **willing to provide an opinion** regardless of whether they have firsthand experience or strong sentiment. They are also more likely to indicate positive sentiment, unless they have clear reasons to think otherwise – such as personal experience or major regulatory issues.

# On balance, there are high levels of confidence and trust in legal services across stakeholders

The Strategic Performance Indicators (SPIs) will serve as a benchmark for ongoing tracking, over the course of the 2023-2026 Strategy.

## Strategic Performance Indicators (% agree)

Legal Professionals Consumers SMEs MPs and Senedd Opinion Leaders



# We identified nine drivers of confidence and trust

Factors impacting confidence and trust in legal services were identified during the exploratory qualitative phase. We have tested these quantitatively with each audience to ascertain the extent to which they drive confidence and trust to serve as a benchmark, as well as to support understanding of where the SRA should be strategically focusing.

Awareness that certain legal service providers are regulated

Value for money for consumers

Transparent cost structures for consumers

Clarity and timeliness of communication from legal professionals to their clients

How easy it is for consumers to access clear information about legal services

High standards in legal professional services

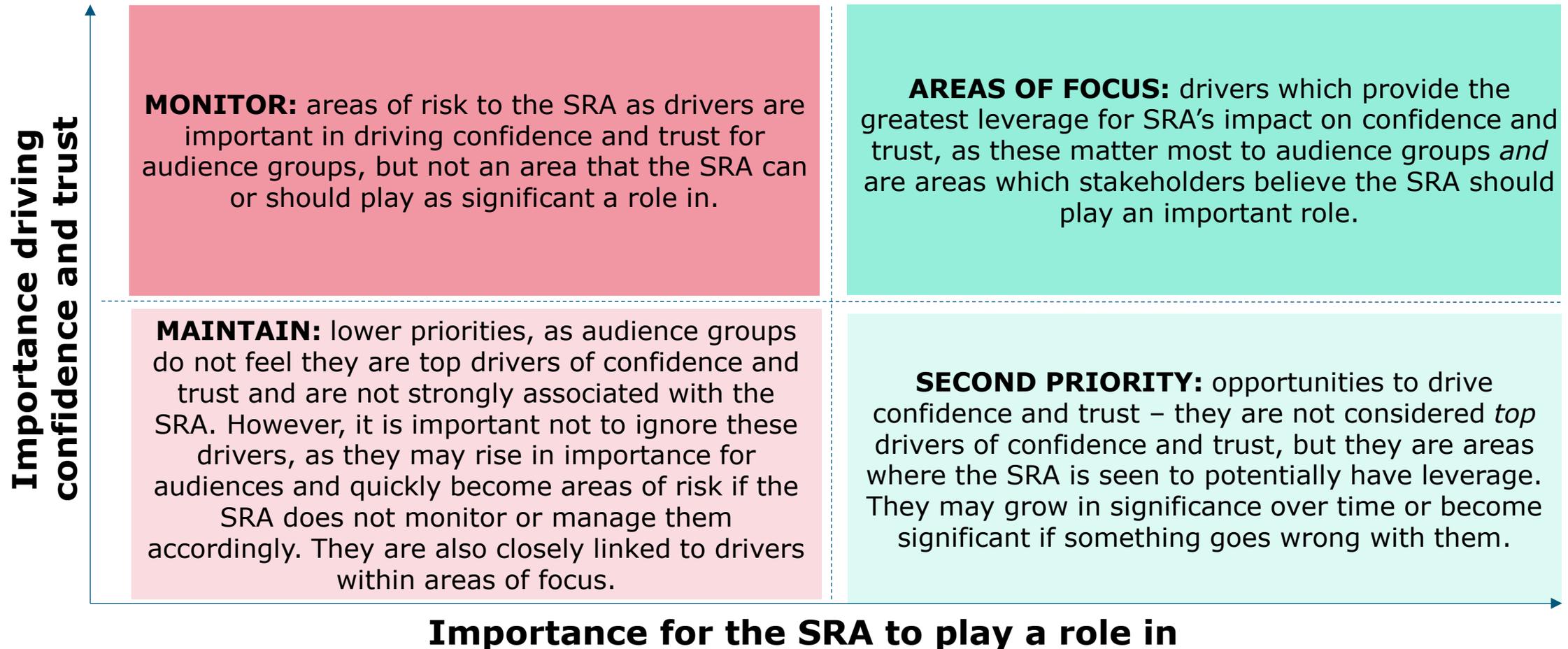
Legal professionals who have undertaken high quality training and qualifications

Positive coverage of the legal sector in the media

Regulatory action in the face of malpractice from legal professionals

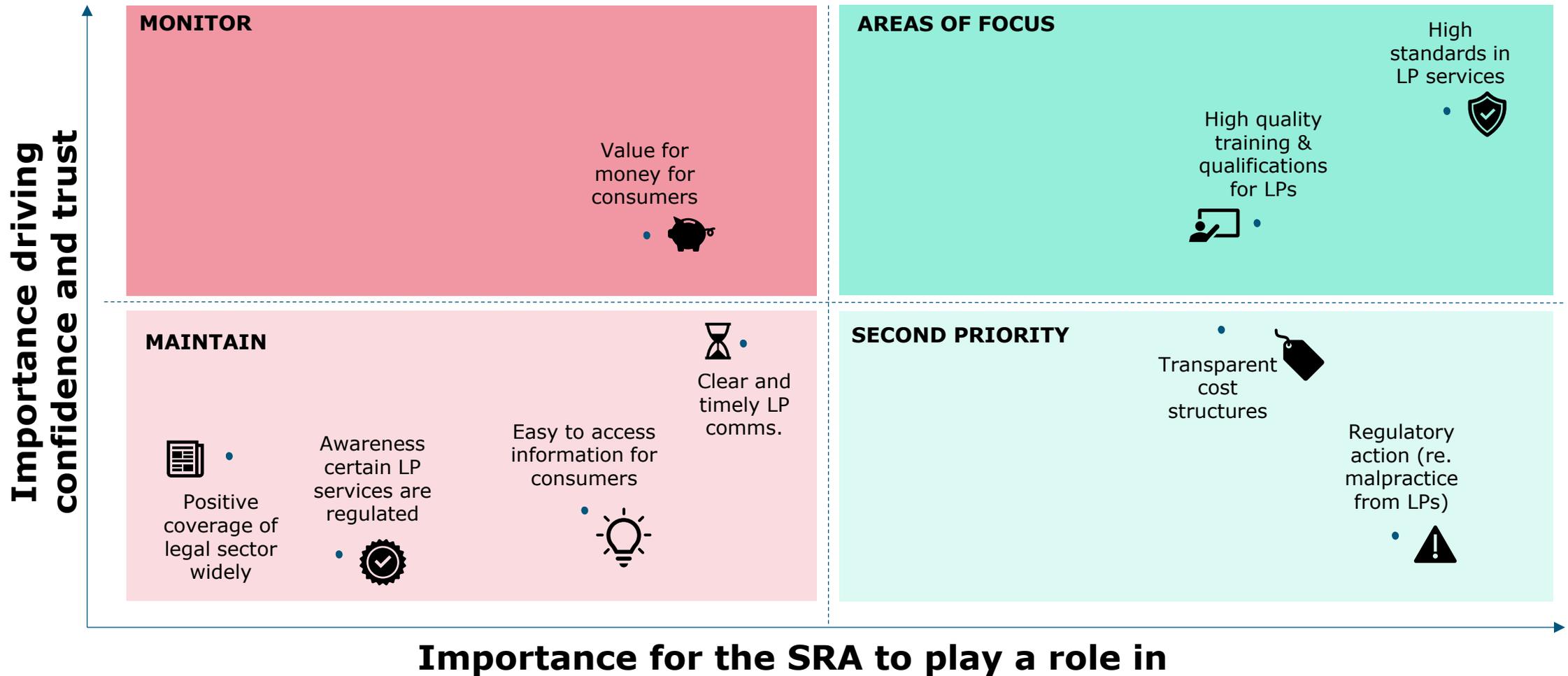
# We arranged the nine drivers in a priority matrix based on their importance to audiences, and the strength of association with SRA

After identifying and testing the impact of nine factors in relation to driving confidence and trust in legal services, we then explored this alongside which factors audiences believe are most important for the SRA to play a role in, to support confidence and trust. Results have been plotted on the below matrix.

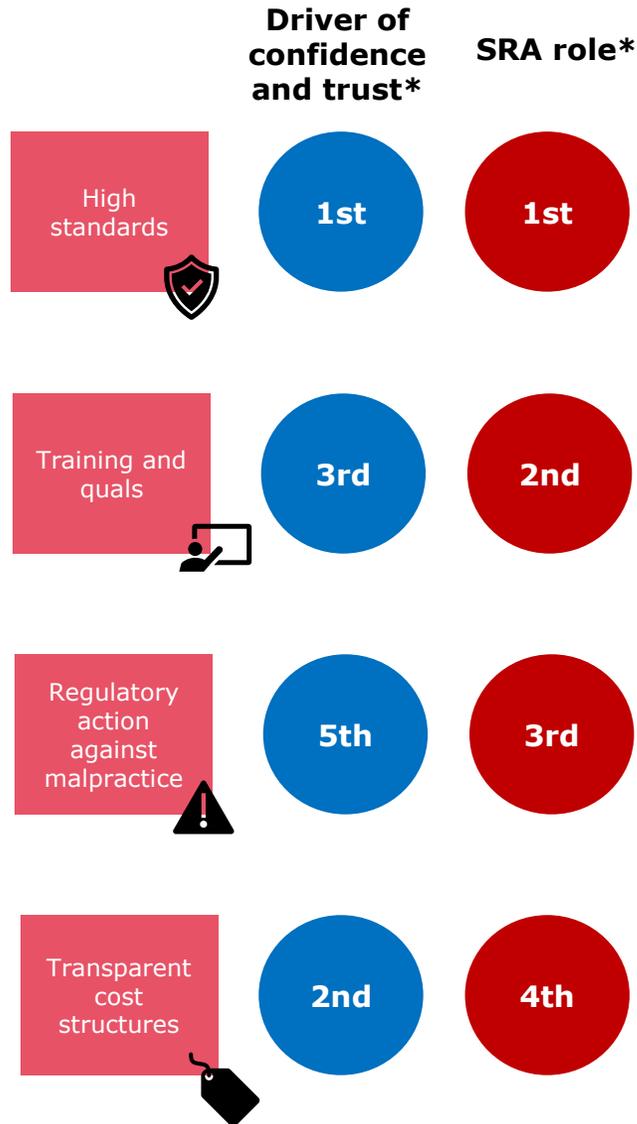


# Confidence and trust matrix

Using an average 'all audience' ranking developed through a sum of ranks, we have plotted the nine drivers to illustrate which factors the SRA should consider strategic priorities in order to increase confidence and trust in legal services.



# Stakeholder views of drivers: areas of focus and second priorities



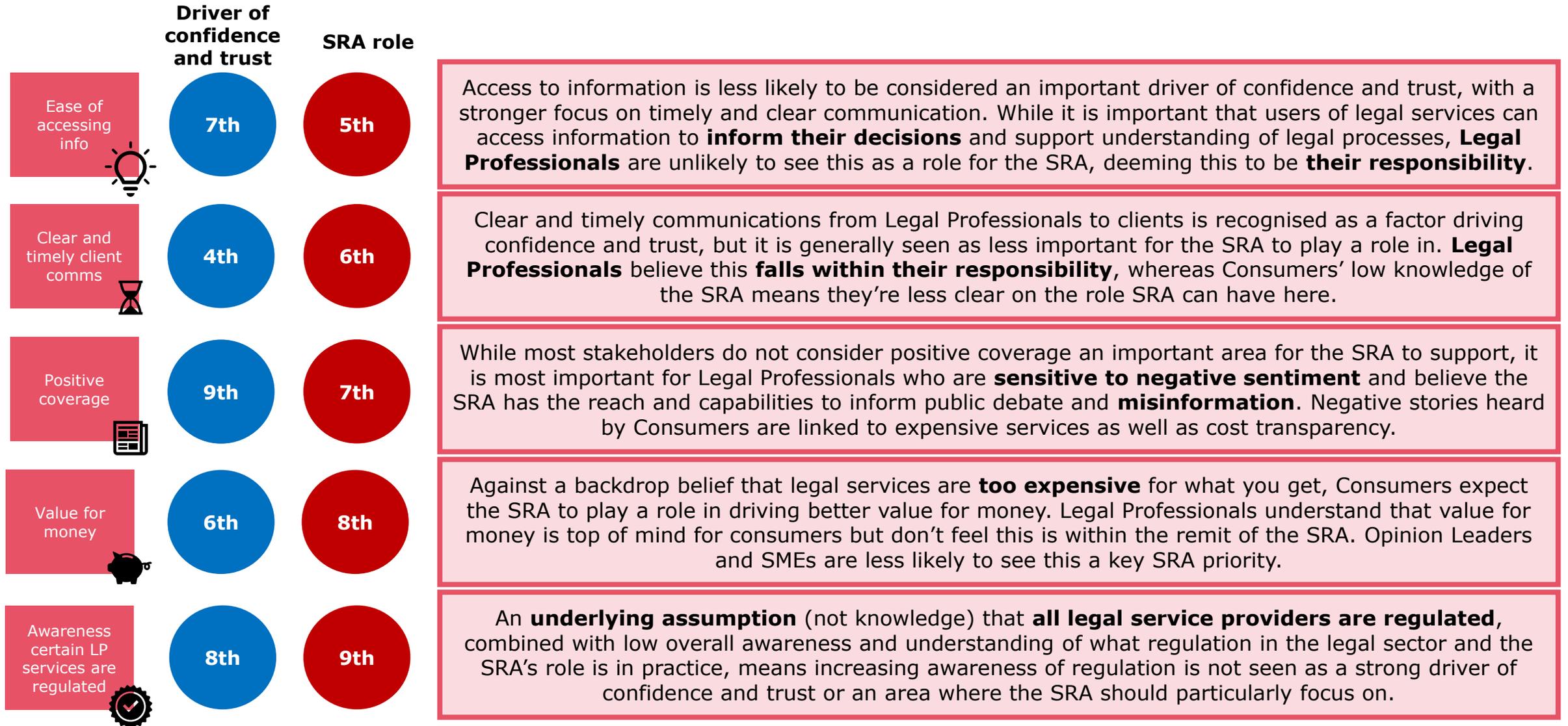
High standards is the driver with the most consensus between stakeholder groups, considered crucial to driving confidence and trust and seen as the **outcome of high entry standards** and **taking action in response to misconduct**. Opinion Leaders see **protecting consumers by taking action against misconduct** as slightly higher on the SRA's list of priorities than high standards, perhaps reflecting their understanding of a regulator and the more tangible driver of action against malpractice.

High quality training and qualifications for legal professionals (LPs) is seen as a core area of focus for all groups. It is seen as a core area of the **SRA's remit**, and an actionable area for the SRA to **improve standards**, and in turn confidence and trust. There is an understanding that high standards are a product of extensive training and qualifications. LPs recognise the need for ongoing CPD, particularly to stay abreast of changes.

Opinion Leaders recognise that regulatory action is a key area where the **SRA can have an impact**. **SMEs appear more equipped to tackle problems** when things go wrong, being more likely to take the 'right' actions to protect themselves and feeling they received the right information and support compared to Consumers. Legal Professionals recognise the SRA can have an impact in this area but feel more negatively about the SRA's **enforcement and investigation** activity more broadly.

Consumers would most welcome guidance on what is an **appropriate and fair cost** for legal services – this is true to a lesser extent for SMEs. Opinion Leaders and MPs and Senedd Members are likely to link cost transparency to better **access to justice**. LPs feel that cost transparency is even more important for those who **don't use legal services**, recognising this as a potential barrier to engaging with legal services.

# Stakeholder views of drivers: monitor and maintain



# Implications for the SRA: four priority areas

**Following analysis of the data collected in this research, we identified four factors as the most impactful, and that hold the most potential for the SRA to focus on for the future to drive confidence and trust:**

## High standards in legal professional services

Strongly linked to other factors – often seen as an outcome of training and regulatory action, while easy access to information and clear communication indicate high standards to users of legal services. Perceptions and satisfaction linked to this area are often shared by consumers through word of mouth.

## Legal professionals who have undertaken high quality training and qualifications

This area is considered important to drive high standards, and firmly within the SRA's remit. This area will be key to ensuring long-term maintenance of confidence and trust, as there is an expectation from all audience groups that sector must stay abreast of future changes, such as technological advances.

## Regulatory action in the face of malpractice from legal professionals

Key to protecting consumers and core to protecting high standards in the profession in the view of audiences. Consumers and SMEs say that they are reassured by having this safeguard in place, although more awareness of this work may be needed.

## Transparent cost structures for consumers

Linked to access to justice and empowerment of consumers. Transparency is needed to judge whether the price of the legal services chosen is fair, proportionate and in turn, good value for money. Transparency ensures consumers feel they can effectively access legal services and instils confidence and trust.

# Implications for the SRA: areas of impact

**All stakeholder audiences believe it is the SRA's role to drive confidence and trust in legal services and this research has found clear areas in which the SRA can have most impact.**

High standards in legal professional services

Communicating how high standards within legal services are **achieved and maintained** will help to drive client and public confidence and trust in legal services overall. Focusing on areas interlinked with high standards will boost perceptions further.

Legal professionals who have undertaken high quality training and qualifications

There is an understanding that high standards are a product of extensive training and rigorous qualifications, and the quality of this must be upheld. Training to ensure legal professionals can **stay apace of future changes and innovations** is key.

Regulatory action in the face of malpractice from legal professionals

High proportions of users don't know what to do if they experience misconduct and what avenues there are to redress. More **awareness of what does in fact constitute malpractice** and how the SRA could support them, as well as their role in addressing malpractice more broadly could drive confidence and trust further.

Transparent cost structures for consumers

Stakeholders care about **access to justice** and see a lack of cost transparency as a barrier to this. Therefore, focused activity in this area will help to engage audiences. Providing insight into legal processes to help providers justify costs and manage expectations will support professionals and ensure consumers feel they are getting **value for money**.

# Implications for the SRA: stakeholder considerations

**While stakeholder groups are largely aligned on the factors which drive confidence and trust in legal services and the priorities for the SRA, there are some considerations for each audience:**

Legal Professionals	Consumers	SMEs	MPs and Senedd Members	Opinion Leaders
<p>This audience are sensitive to negative narratives and misinformation and want to feel that their profession is being championed. Their dissatisfaction with regulatory actions can create barriers to engagement, but many say that they would be open to further support (e.g. ethical guidance, CPD) from the SRA to help uphold high standards.</p>	<p>Cost is front of mind for this audience. There is a strong sense that services are very expensive, but acknowledgements that the expertise and standards come at a premium. The existence of legal regulators instils confidence and trust in these audiences, although over half aren't aware of the SRA (or any other legal regulators), so this is based on their assumptions, not knowledge.</p>	<p>Compared to Consumers, SMEs are more likely to feel that they have the knowledge and tools to confidently access legal services. They are less likely to feel that legal services are prohibitively expensive. Transparency of cost structures, as opposed to value for money, is more important for this group, who may have had experiences of legal services not feeling commensurate with the fee charged.</p>	<p>There are high levels of uncertainty or neutral sentiment among this group. This may reflect low knowledge, or impartiality. The new Parliament and Senedd, with lots of new MPs and MSS, could present an opportunity for the SRA to engage parliamentarians further to narrow the awareness gap between SRA and other (non-legal) regulators. Taking action in the face of misconduct to protect consumers is a key priority.</p>	<p>Consumer protection is a key priority for this audience, and this is the lens through which factors are considered. Linked to consumer protection, they recognise the importance of cost transparency to empower consumers and support access to justice.</p>



**Nine in ten**

feel more confident using a provider that is regulated, when prompted to think about the difference between regulated and unregulated legal services providers. This echoes the assumption that all providers are regulated (as found by this research) and indicates this is a hygiene factor: the mere existence of a regulator drives confidence and trust as a safeguard is in place to protect consumers.

# Objectives and methodology

# Objectives of the research

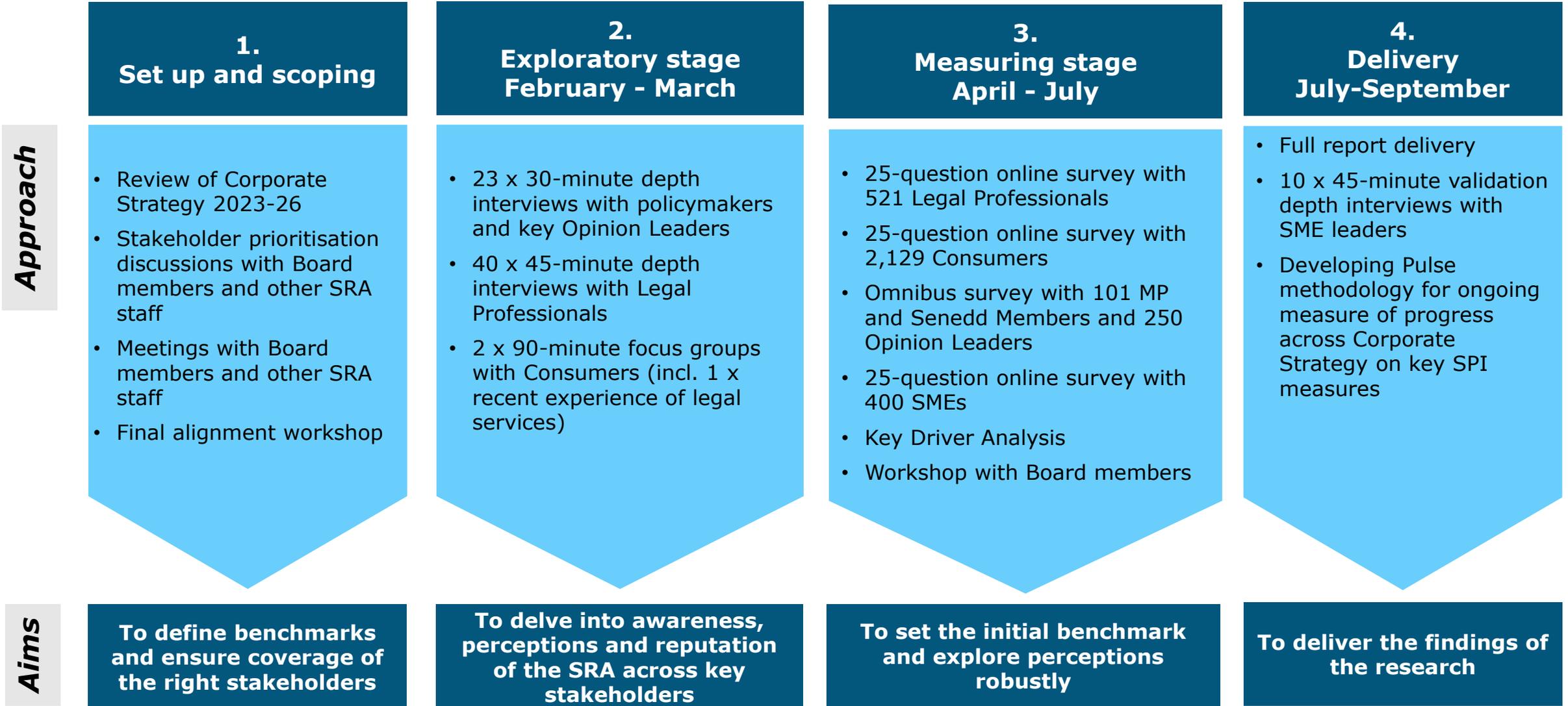
**1.** Understanding which main areas contribute to confidence and trust in legal services

**2.** Understanding where the SRA should be focusing strategically in order to drive confidence and trust in legal services

**3.** Setting a benchmark for the levels of confidence and trust in legal services, to track over time



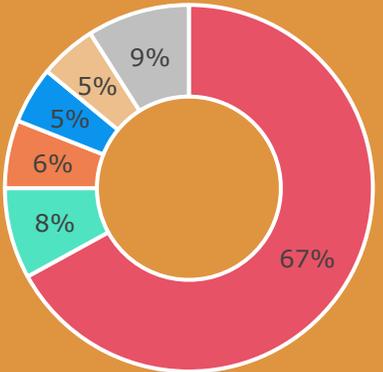
# Our methodology



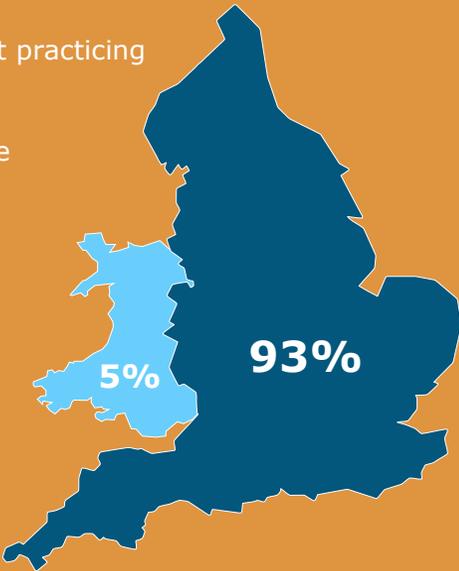


# Legal Professionals

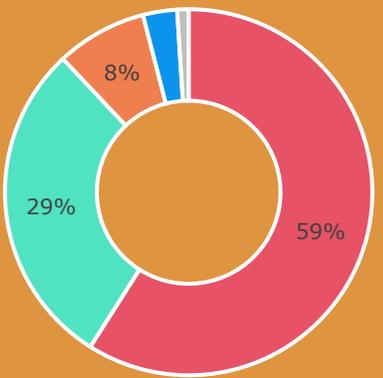
## Job Type (Top 5)



- Solicitor
- Retired / not practicing
- Paralegal
- Legal trainee
- Barrister
- Other



## Regulation

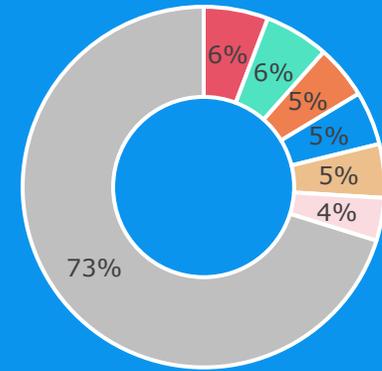


- Regulated by SRA only
- Regulated by SRA and another regulator
- Not regulated by a legal services regulator
- Regulated by another legal services regulator
- Other

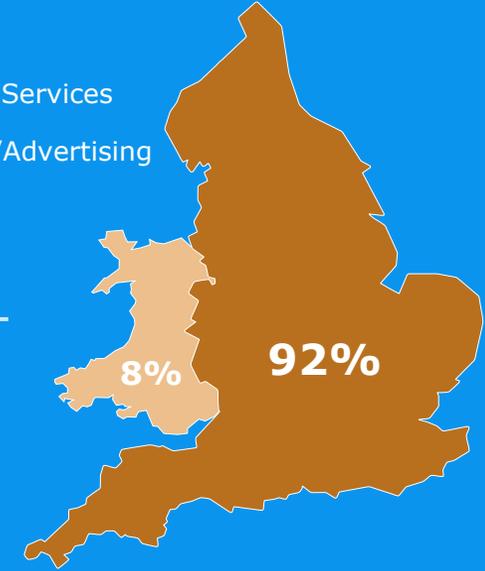


# Opinion Leaders

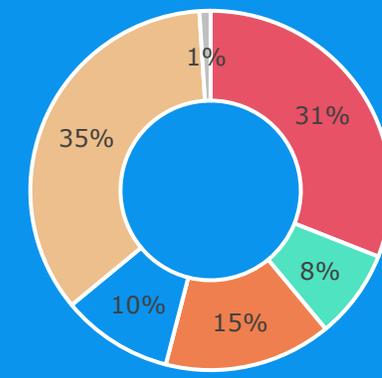
## Business Sector (Top 7)



- Financial Services
- Education
- IT & Telecoms
- Medical & Health Services
- Media/Marketing/Advertising /PR & Sales
- Manufacturing
- Other



## Seniority Level

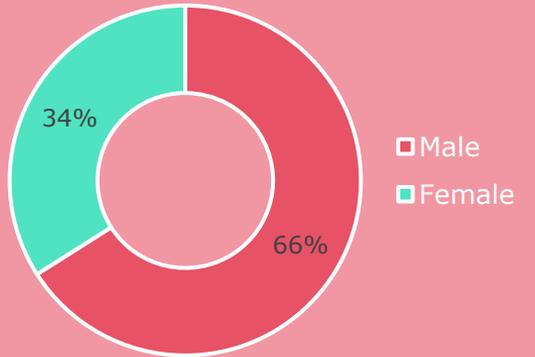


- Executive management
- Senior management
- Middle management
- No management responsibility
- Retired / freeland / not currently working
- Other

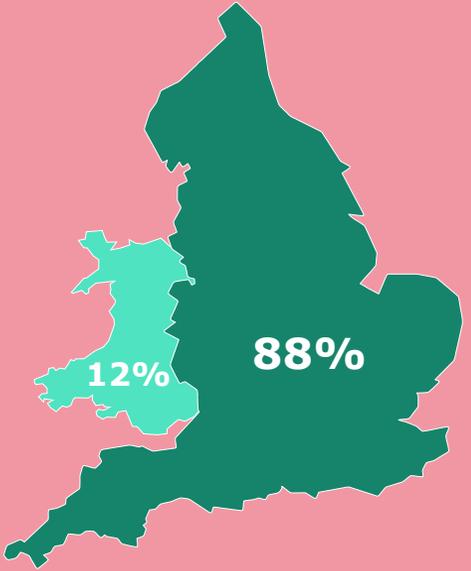
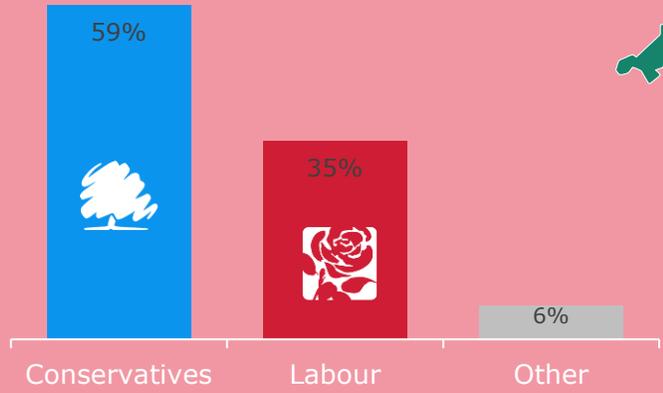
Asked to LPs - QA: In which region are you currently based? Q1: which of the following best describes your job role? Q8: Thinking specifically about regulation in relation to legal services activity, which of the following applies to where you work? Base n=521  
 Asked to OL's: YouGov omnibus screening questions, Base n=250

# MPs / Senedd

## Gender

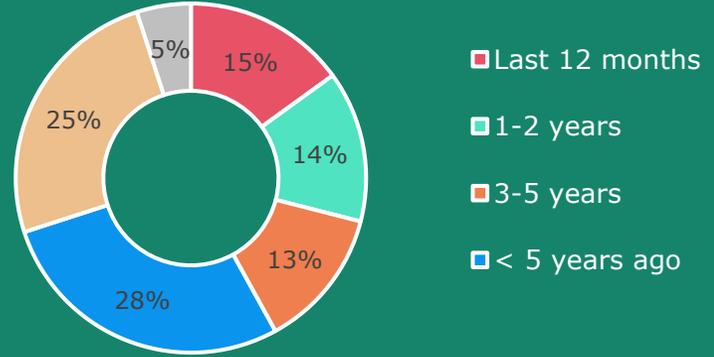


## Political party

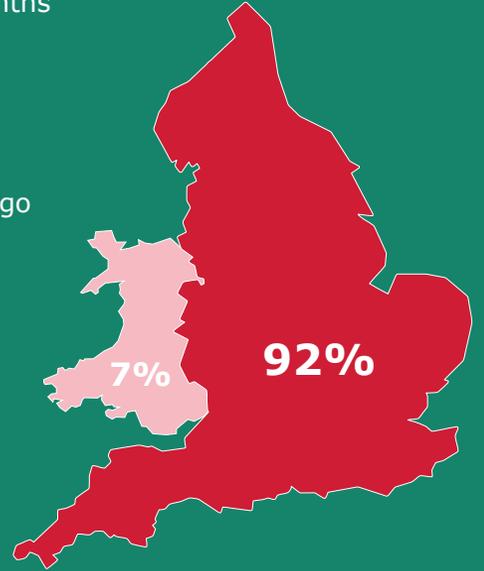
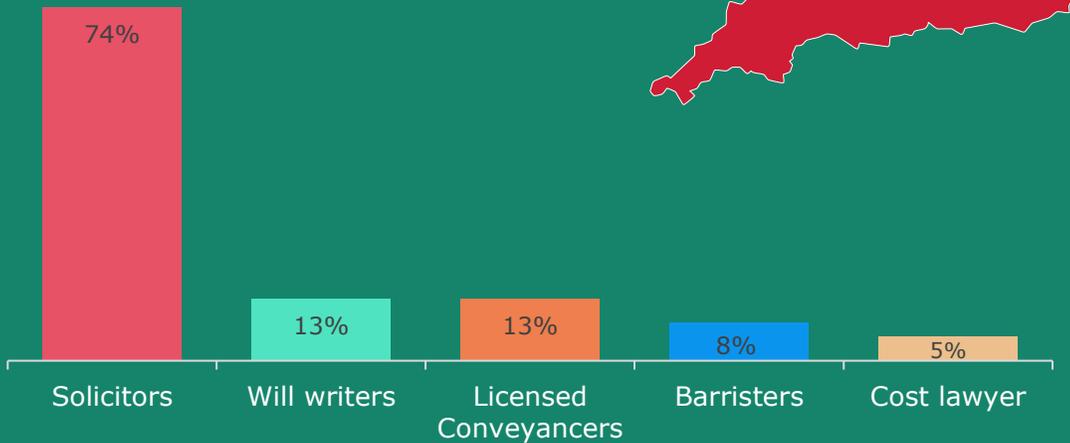


# Consumers

## Use of Legal Services



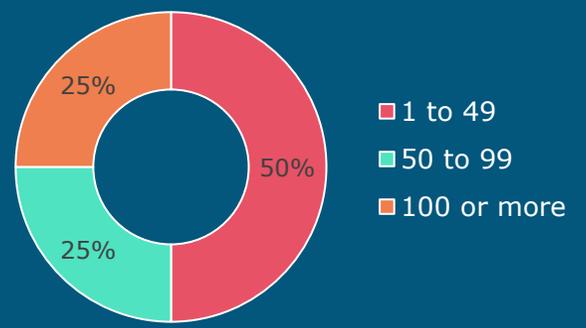
## Legal professional engaged with (Top 5)



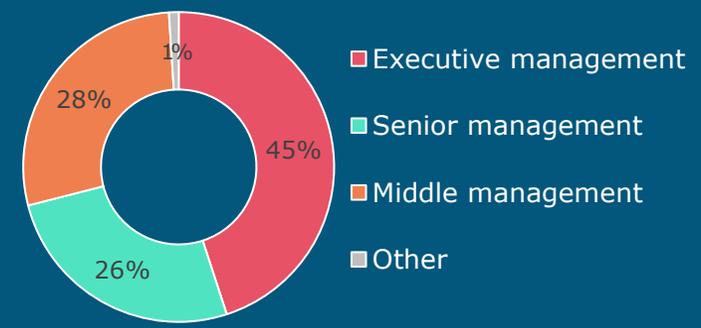
Asked to MPs/ Senedd - YouGov Omnibus screening question for region, gender and political party. Base n=99. Asked to Consumers - Q1: In which region do you currently live? Base n=2,129, Q6: Have you ever used legal services? Base n=2,129, Q8=When you used legal services, what type of legal professionals did you engage with? Base n=1,489

## SMEs

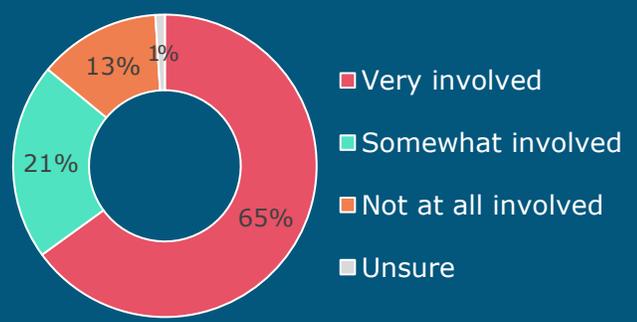
### Size of business



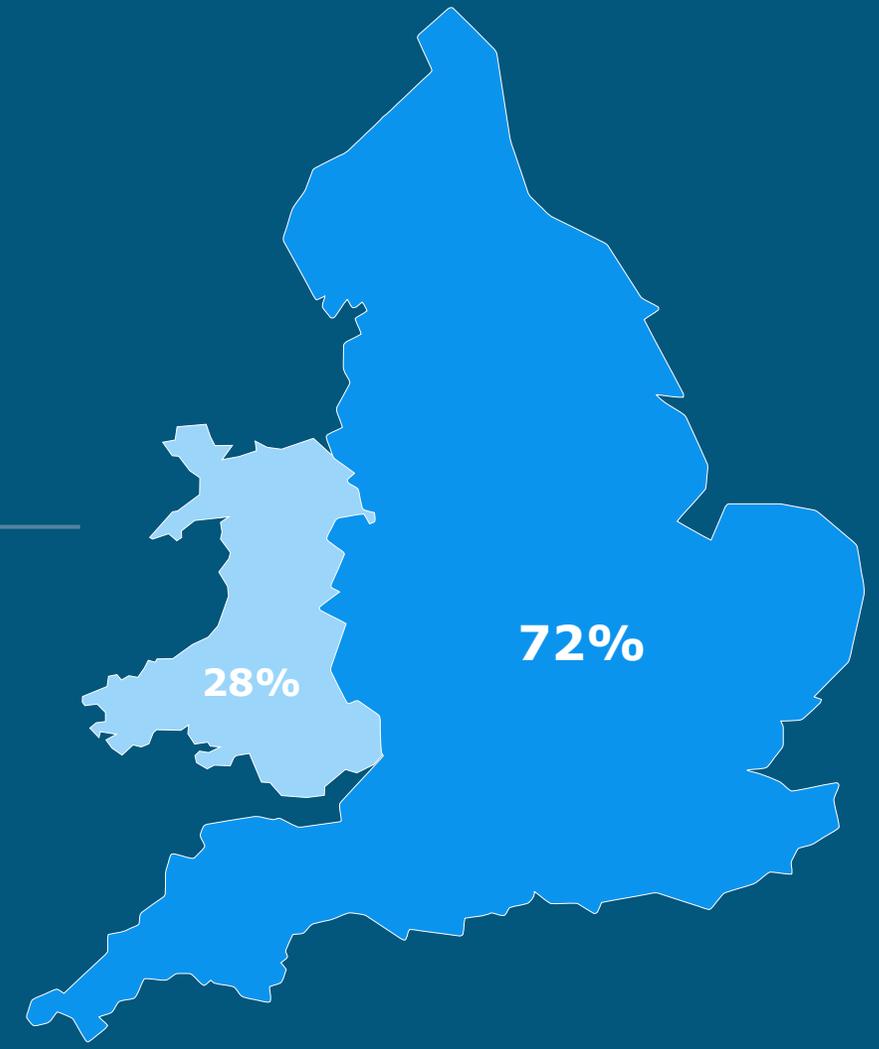
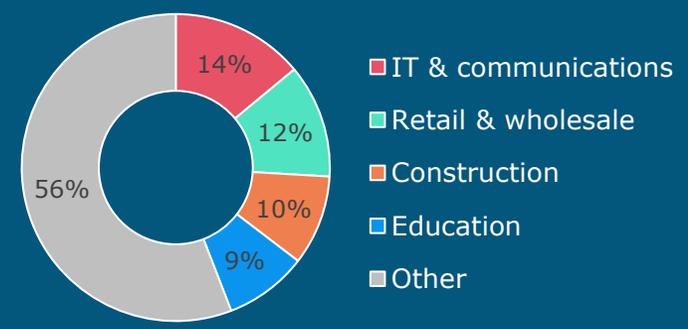
### Seniority level



### Involvement in choosing legal services



### Business sector (Top 5)



Asked to SMEs - Q1: In which region is your business based?, Q2: How many people does your business employ?, Q3: Which of the following sectors does your business operate in?, Q4: Which of the following best describes your currently level of seniority in the business? Base n=400

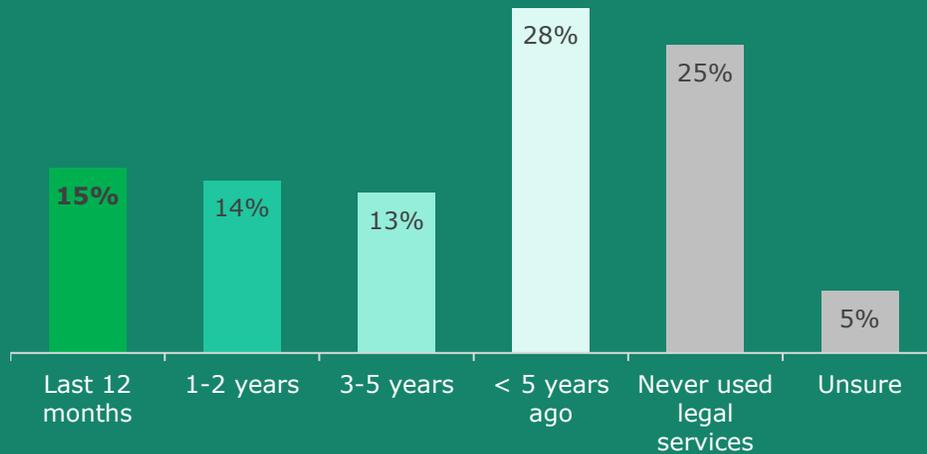


# Experience of using legal services

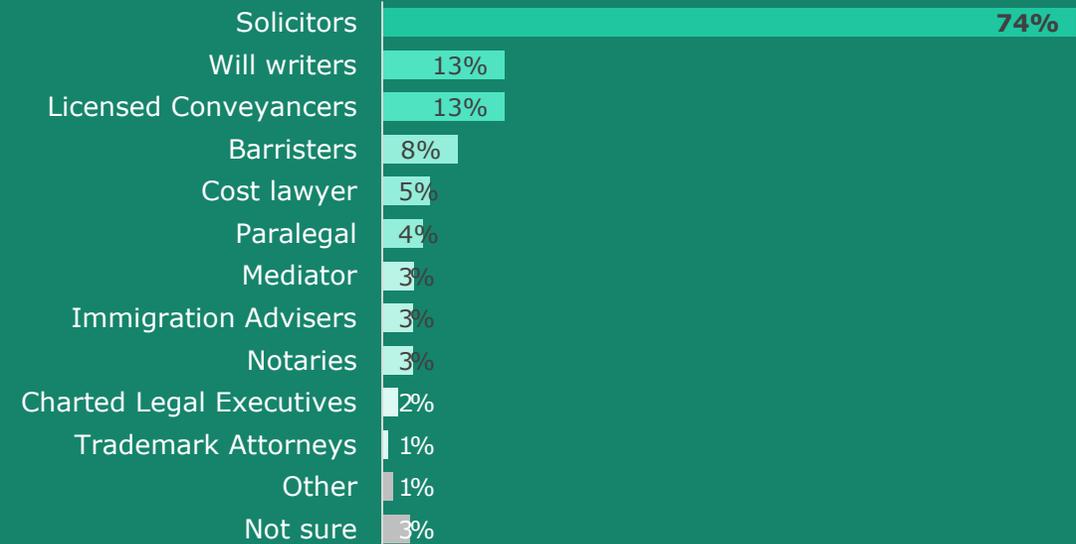


# Consumers' use of legal services - overview

## Use of Legal Services



## Legal professional engaged with (ever)

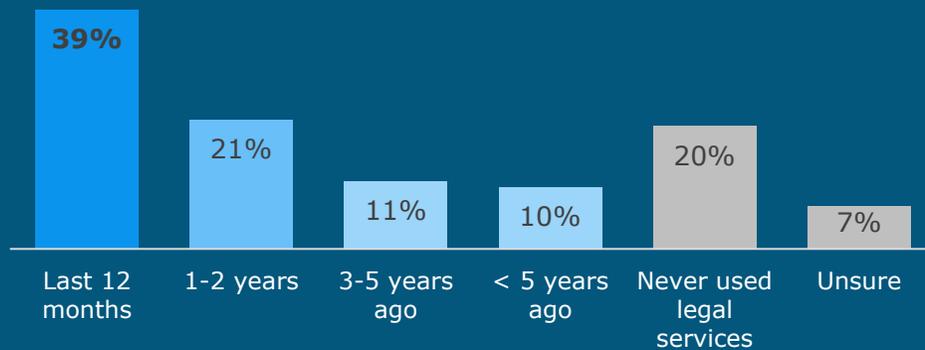


## Legal services used in the last 12 months



# SMEs' use of legal services - overview

## Use of Legal Services

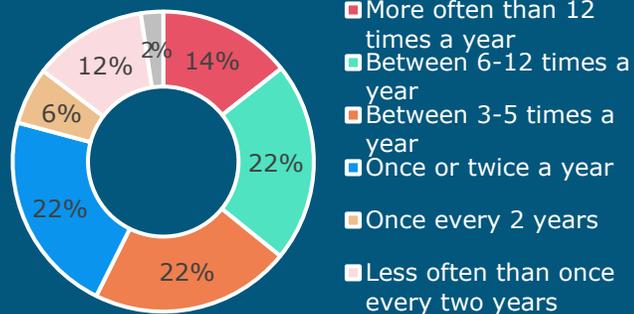


## How they get legal advice when needed



## Frequency of using legal services\*

*Of those who have used legal services ever*



## Legal services used in the last 12 months



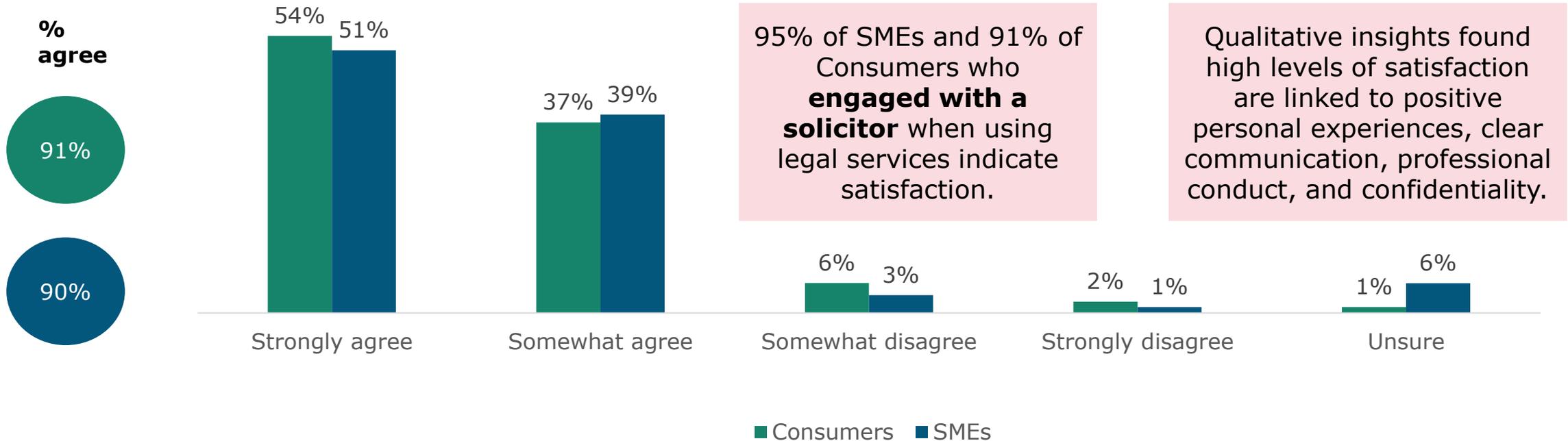
## Legal professional engaged with (ever)



# Users of legal services indicate high levels of satisfaction with the service they received

**I was satisfied with the service I received**

% of those who have ever used legal services

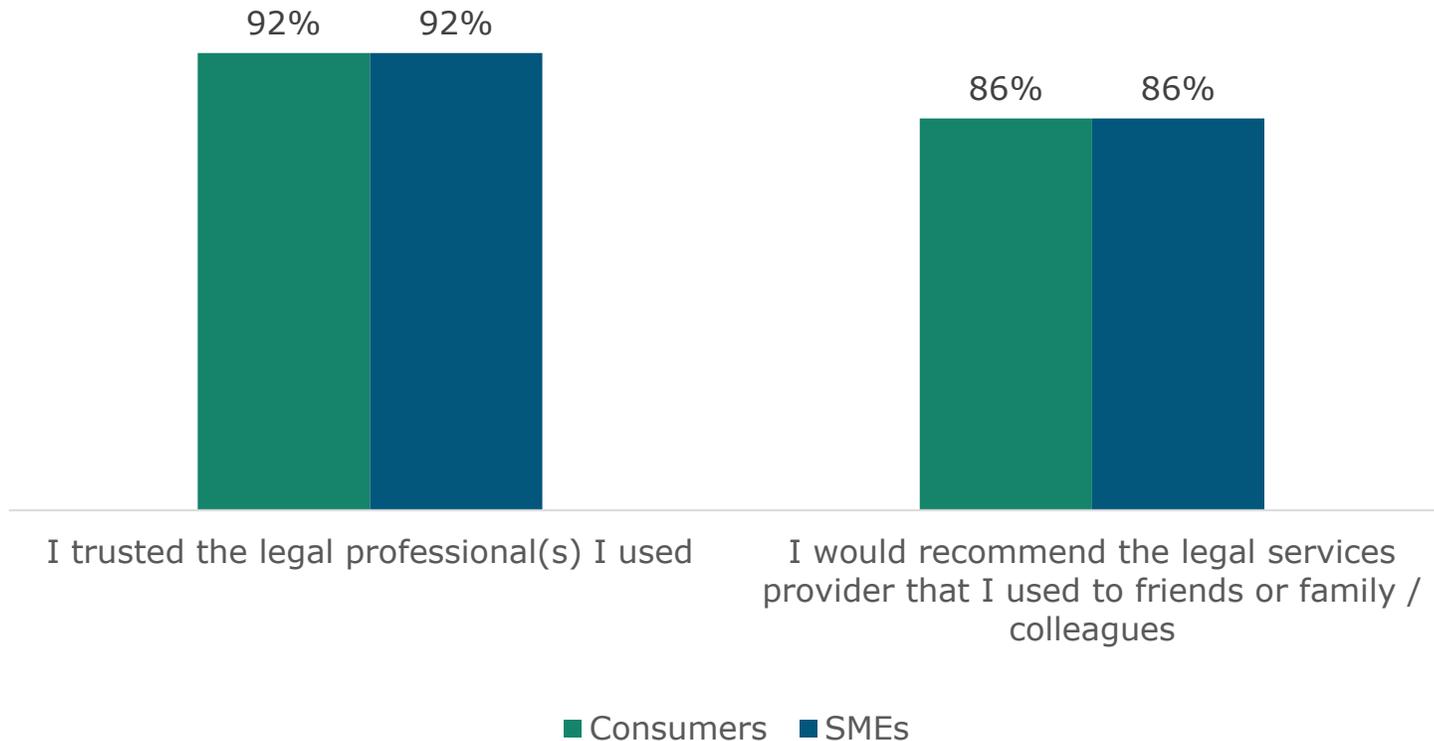


Consumers who **used legal services more recently** are slightly less likely to agree they are satisfied (87% in the last 12 months, compared to 94% 5 years ago). Those who used **conveyancing and probate services** have a below average level of agreement (84% and 78%).

# High proportions of legal service users report trust in the legal professionals they engaged with

## Experience of using legal services

% of respondents who 'somewhat' or 'strongly' agree



97% of SMEs who **engaged with a solicitor** when using legal services indicated they trusted the legal professional they used, as well as 93% of Consumers.

Qualitative insights found that Consumers who had a positive experience when using services felt that Legal Professionals were acting in their best interests, which instilled trust.



# **Awareness and perceptions of regulators**

# Regulation is inherently linked to stakeholder confidence and trust

**Opinion Leaders and Legal Professionals** acknowledge the importance of having a legal regulator.

- They agree that regulation plays a **crucial role in shaping both the profession and consumers' confidence and trust** in the legal sector.
- OLs and LPs **speculate that the consumer assumes the legal sector is regulated**, which should naturally enhance confidence and trust, as seen in other industries such as with the FCA in finance.
- However, the qualitative interviews showed there's a common understanding that the **public are unlikely to know the name of any legal regulator.**

**Consumers** demonstrate an awareness of various regulators (such as FCA and GMC) but struggle to name a legal regulator. Yet, there's a consensus that their role should involve upholding standards, safeguarding the public, and increasing awareness of legal regulation.

**SMEs** are more likely to be aware of the SRA and legal regulation more broadly, but this is far from universal.



*"A regulator is there to make sure the profession operates in an ethical manner and upholds the status of the profession in the eyes of the public."*

- Legal Professional

# Differing stakeholder views on why regulation matters

**Despite agreeing on the importance of legal regulation, Opinion Leaders prioritise consumer protection, whereas Legal Professionals emphasise professional standards:**

## Opinion Leaders

Opinion Leaders perceive regulators as the “**guardians of public trust**”, responsible for **maintaining high-quality services**, offering **recourse to consumers** in case of issues, and **driving forward progress** within the industry.

*“Regulation is largely about inspiring trust and confidence from a public perspective and an individual consumer perspective as well as for the good of the the sector.”*

- Opinion Leader

## Legal Professionals

Legal Professionals primarily view regulators as **responsible for maintaining accountability** within the profession by **setting high standards, providing guidance, and ensuring compliance with principles set**. While consumer protection remains central to this, Legal Professionals stress the regulator’s impact on the profession over consumer concerns.

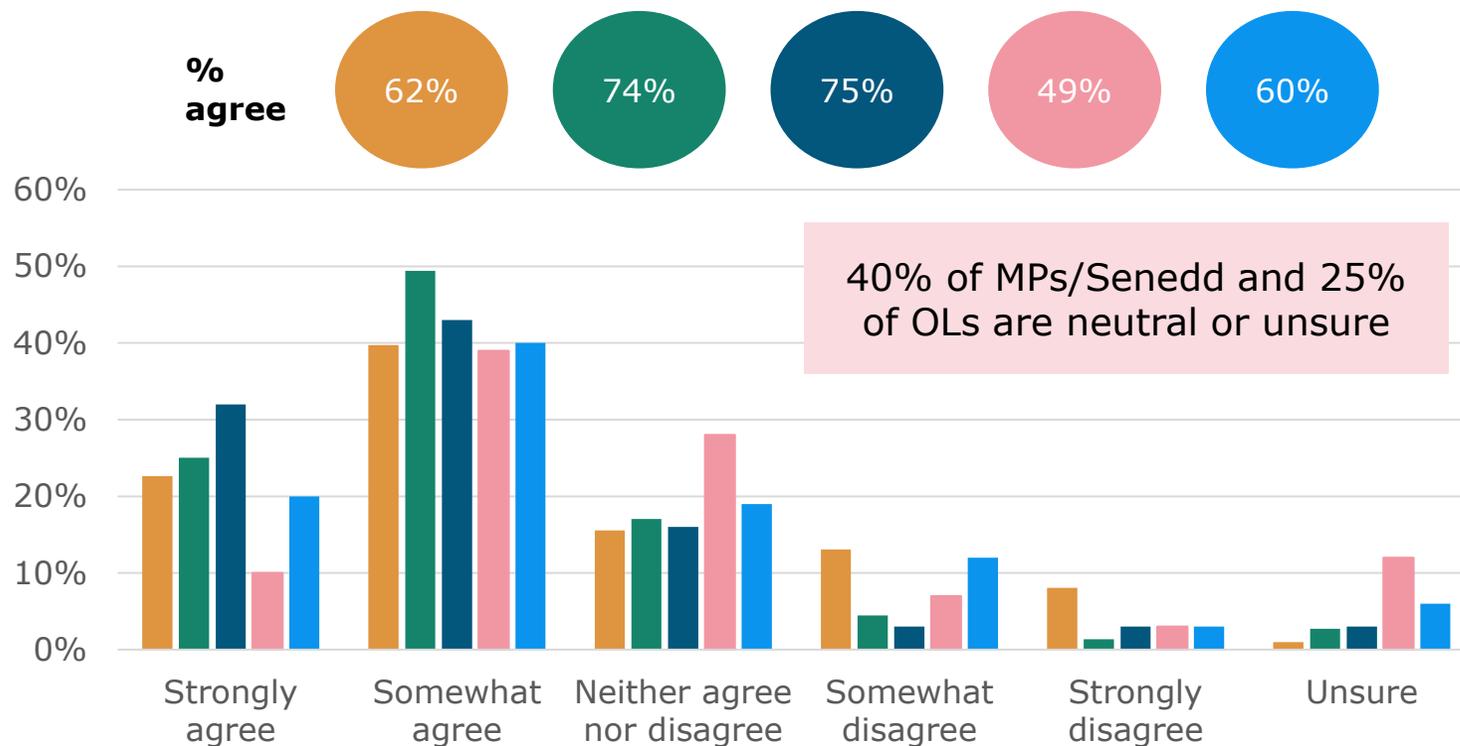
*“We need to have rules for how solicitors can establish firms, what they do, how they behave, and what happens if they don’t.”*

- Legal Professional

# Most audiences believe legal services are well regulated, particularly Consumers and SMEs

## I believe legal services are well regulated

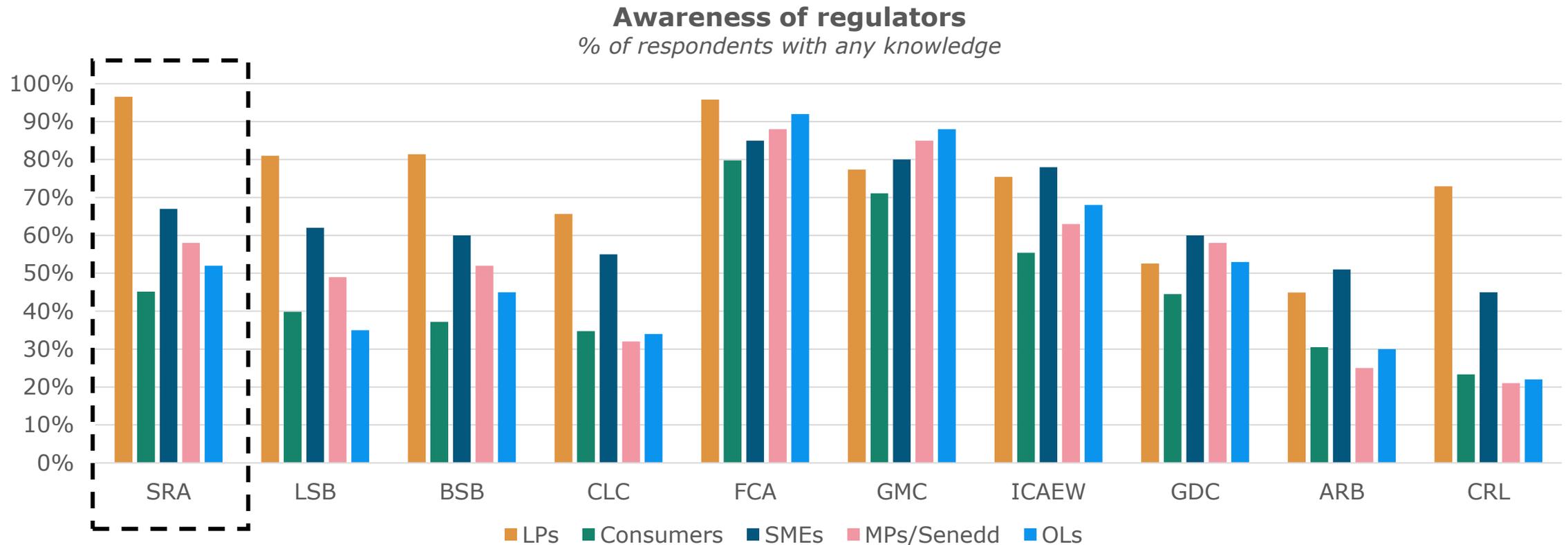
■ LPs ■ Consumers ■ SMEs ■ MPs / Senedd ■ OLs



There are no significant differences in agreement that legal services are well regulated amongst Consumers and SMEs who have and have not used legal services.

In Parliament, Labour MPs are significantly less likely to believe that legal services are well regulated (34% to 57% of Conservatives) – however, this may relate to an **opposition effect** and indicative data from the Senedd shows that the opposition Conservatives are similarly more sceptical.

# Audience awareness of the SRA is largely in line with levels of awareness of other regulators

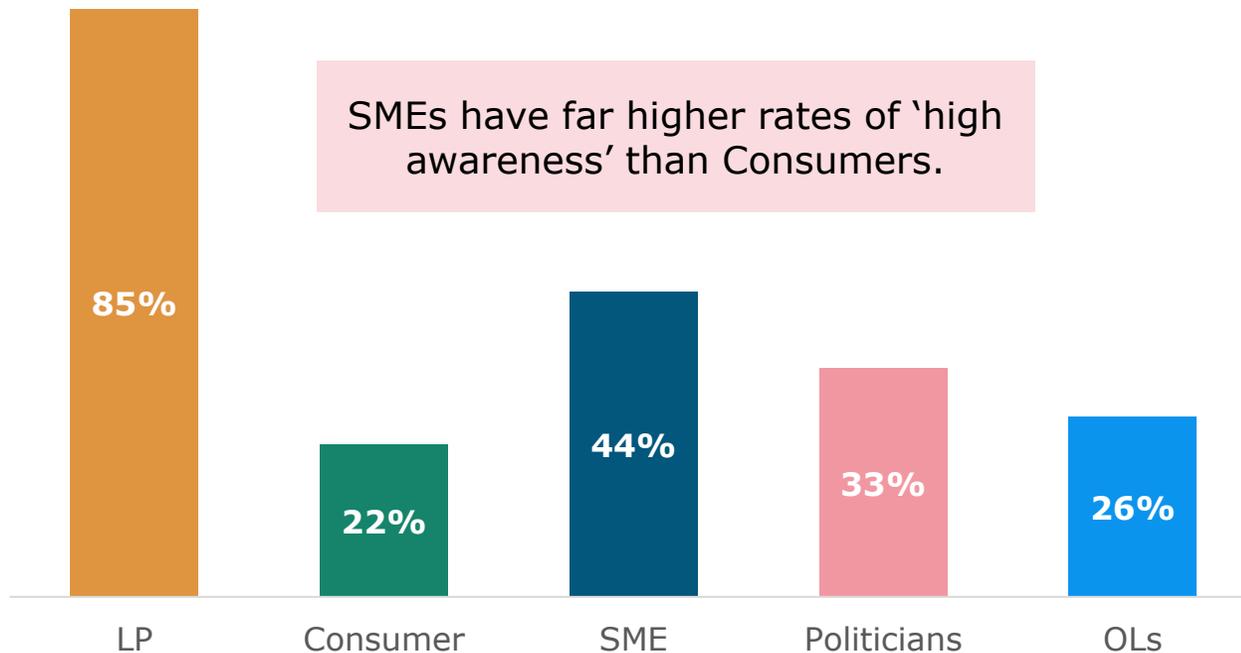


Perhaps unsurprisingly, awareness is highest for the Financial Conduct Authority (FCA) and General Medical Council (GMC), including higher proportions indicating 'a great deal' of knowledge. Consumer and SME **awareness of regulators** is highest for the SRA.

# Consumers and SMEs who have used legal services are more likely be aware of the SRA

## High awareness of the SRA

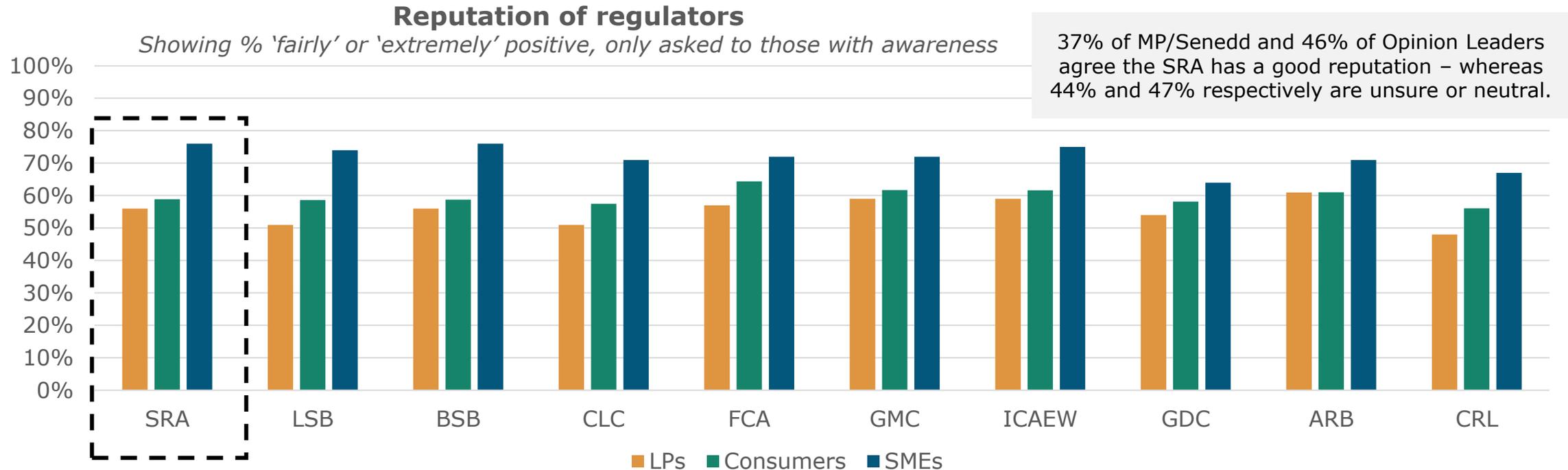
% of respondents selecting 'a great deal' or 'a fair deal'



53% of SMEs and 21% of Consumers who have ever **used legal services** indicate high awareness of the SRA, compared to 19% (SMEs) and 14% (Consumers) who have not.

As might be expected, awareness is highest within the **regulated community** – 92% of Legal Professionals regulated *only* by the SRA have high awareness, and 87% of those regulated by the SRA *and* another legal services regulator.

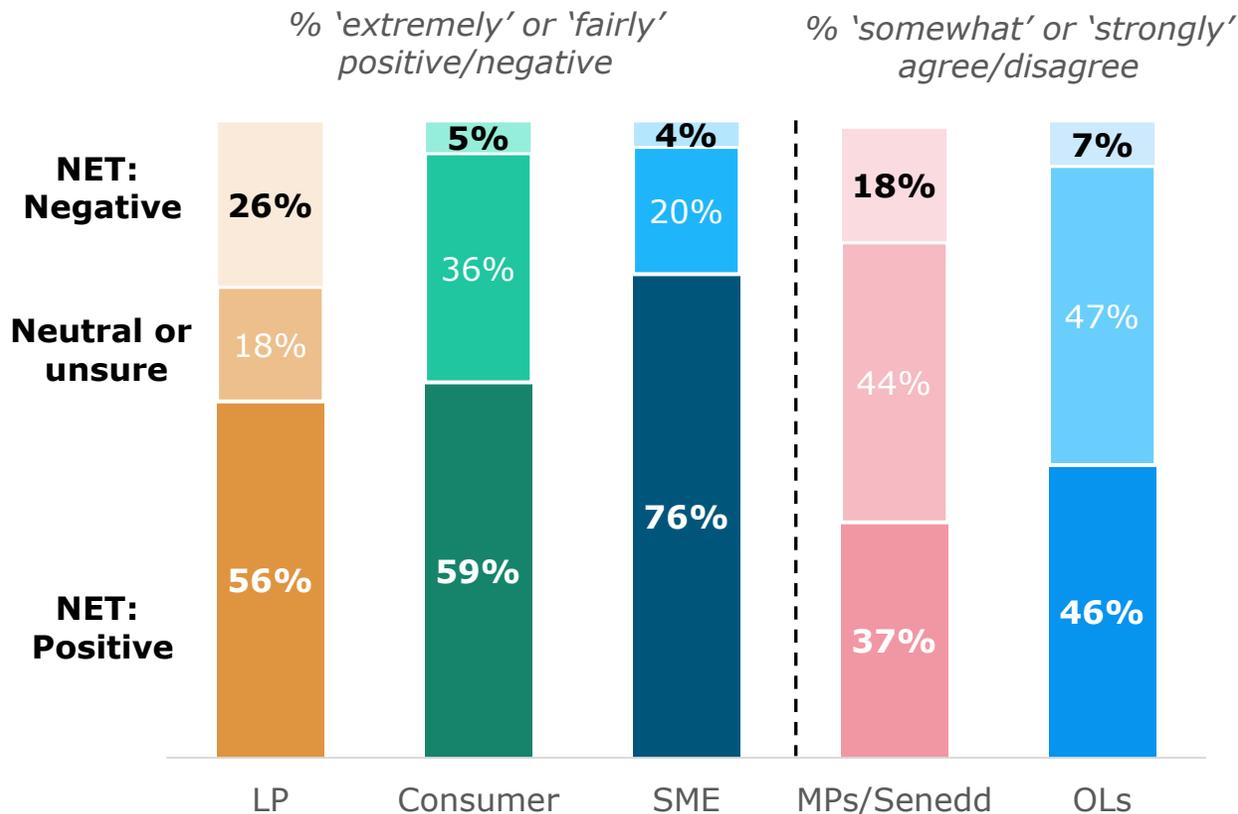
# Reputation levels of regulators are largely similar



Despite higher levels of awareness for the Financial Conduct Authority (FCA) and General Medical Council (GMC), these regulators only hold slightly higher reputation ratings than regulators for which there are lower knowledge levels. This suggests that **reputation does not significantly increase with awareness**, but the nature of regulators' work warrants a positive reputation. Qualitative insights found that while there was very little awareness of legal sector regulators amongst the public, they assumed that all legal services are regulated, and they were **reassured by this safeguard**.

# A majority view the SRA positively, although high proportions indicate neutral feelings

## Reputation of the SRA



MPs and Senedd Members and Opinion Leaders indicate lower levels of agreement that the SRA has a positive reputation. This may reflect **lower levels of knowledge** of the SRA overall and unwillingness to endorse an organisation they do not have firsthand experience with.

**Conservative MPs** are more likely to disagree (22%) than **Labour MPs** (15%); however, they are also more likely to agree (37% Con vs. 32% Labour). The **post-general election** period will present new challenges – a new parliament, new government, as well as a new political landscape. The SRA may wish to capitalise on this, with focused engagement activities to raise the profile of the SRA with parliamentarians (new and returning).

While more likely to express negative sentiment about the SRA than other audiences, the majority of Legal Professionals remain positive about the SRA (56%). The SRA's **reputation is similar to other legal regulators** such as the BSB (56%) and LSB (51%) for this LP audience.



# Confidence and trust in legal services

---

# How confidence and trust is understood

The key audiences are broadly aligned in their understanding of confidence and trust, which are felt to be **closely interconnected concepts** crucial to the sector.

**Confidence is more associated with the perceived quality of services**, while **trust is more associated with the actions and motivations** of professionals and organisations.

There are some broad shared themes on the source of confidence and trust, but different emphasis from each group:

**Legal Professionals foreground their own actions** – through the profession upholding standards and communicating this with clients. Regulators are expected to intervene only when this is lost, or when setting the initial bar to entering the profession.

**Opinion Leaders are more likely to spontaneously emphasise the role of regulation** – particularly when emphasising accountability for misconduct and qualification.

**Consumers focus primarily on the responsibility of providers** – but knowing about redress or other support is reassuring. In practice, knowledge of the SRA and legal regulation is very limited, even among users of legal services.

# Confidence and trust in legal services are seen as interconnected but distinct concepts

- Audiences see **confidence and trust in legal services as interconnected and vital for the reputation and functioning of the sector.**
- In some cases, confidence and trust can be seen as hard to pull apart. But, when asked to do so, most express the following associations...

## Confidence

**Confidence in legal services is associated more with technical proficiency and the quality of the service.**

## Trust

**Trust in legal services is associated more with the integrity of legal professionals that they deal with.**

*"Because you can be a trustworthy individual, but whether or not the person that's coming to you for that advice has confidence in your ability... having confidence in their ability to achieve that outcome is something totally different."*

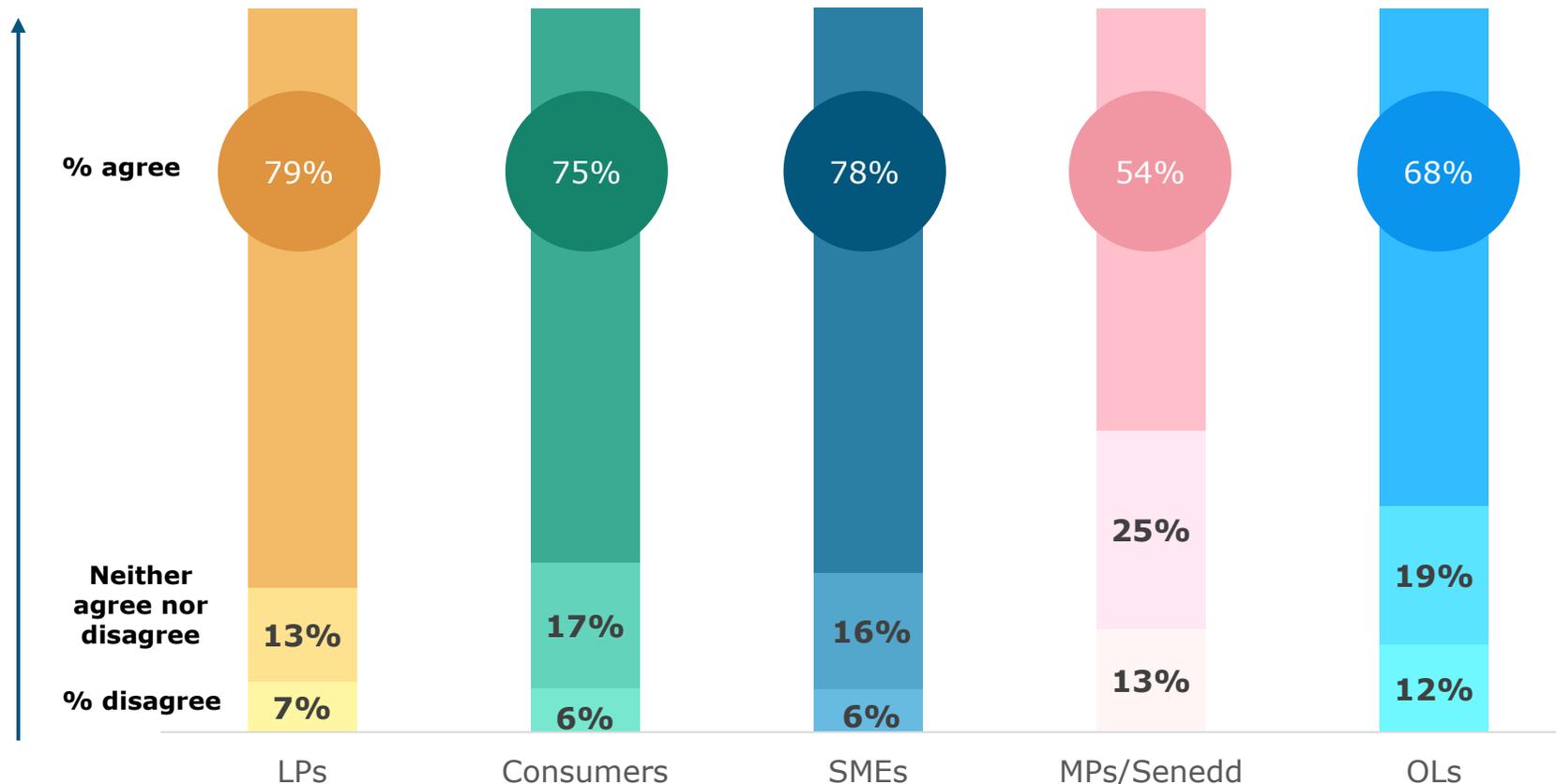
- Opinion Leader

*"If you don't trust a lawyer, you won't be confident in them. And similarly, if you're not confident in someone it doesn't mean you don't trust them, but you feel like you can't depend on them. The consequence of each is you really can't depend on that person and their advice."*

- Solicitor

# Key stakeholders indicate high levels of confidence in legal services

I have confidence in legal services  
% selecting each option



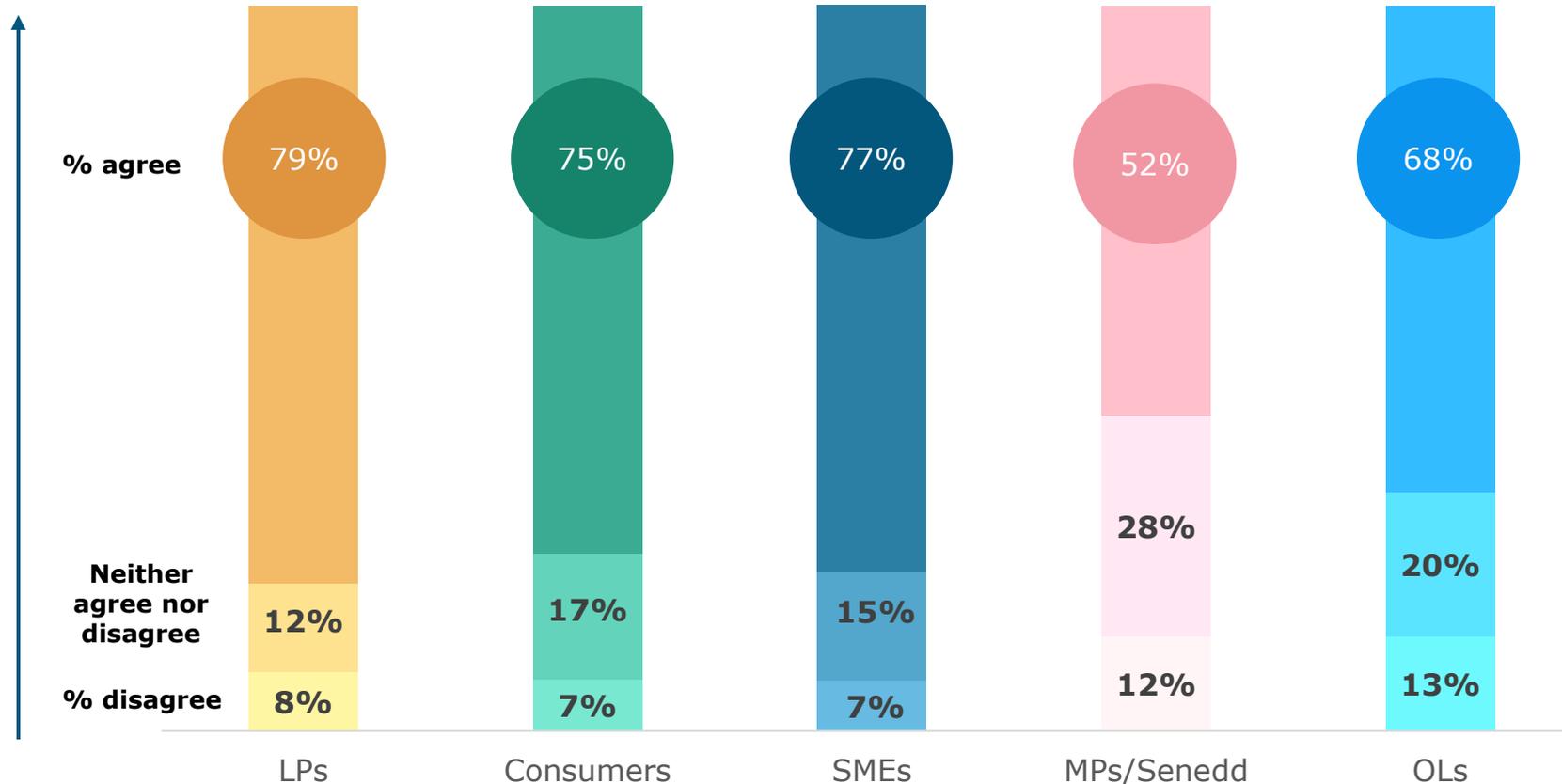
There are **no significant differences in confidence levels** amongst Consumers and SMEs who have used legal services and those who have not.

MPs and Senedd Members (13%) and Opinion Leaders (12%) are the audiences most likely to disagree that they have confidence in legal services.

These stakeholders are also most likely to **indicate neutral feelings**, with a further 8% of MPs/Senedd Members reporting uncertainty.

# Trust in legal services is at a very similar level to confidence

## I have trust in legal services *% selecting each option*



While there are **no difference in trust levels** between Legal Professionals who are regulated and those who are not, LPs who hold positive perceptions of the SRA are more likely to have trust (89%) compared to those who consider the SRA to have a negative reputation (66%).

MP and Senedd Members and Opinion Leaders who hold **higher awareness of the SRA** are more likely to indicate higher levels of trust in legal services.

MP/Senedd Members are also most likely to **indicate neutral feelings**, with a further 8% of MPs/Senedd Members reporting uncertainty.

# We identified nine drivers of confidence and trust

Factors impacting confidence and trust in legal services were identified during the exploratory qualitative phase. We have tested these quantitatively with each audience to ascertain the extent to which they drive confidence and trust to serve as a benchmark, as well as to support understanding of where the SRA should be strategically focusing.

Awareness that certain legal service providers are regulated

Value for money for consumers

Transparent cost structures for consumers

Clarity and timeliness of communication from legal professionals to their clients

How easy it is for consumers to access clear information about legal services

High standards in legal professional services

Legal professionals who have undertaken high quality training and qualifications

Positive coverage of the legal sector in the media

Regulatory action in the face of malpractice from legal professionals

# Stakeholders are largely aligned on the factors which have most impact on confidence and trust

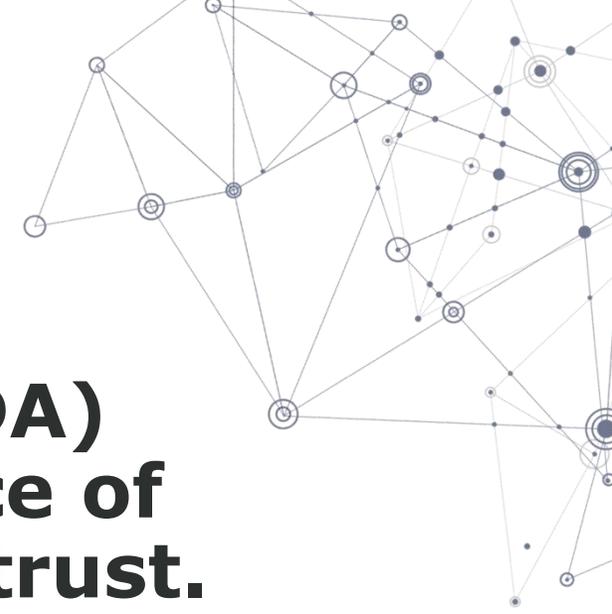
Audiences were asked to rate the impact they believe each factor has on confidence and trust in legal services.

An average 'all audience' ranking has been calculated, using a sum of ranks.

## The three areas which consistently appear in all audiences' top five:

- High standards in legal professional services
- Transparent cost structures for consumers
- Legal professionals who have undertaken high quality training and qualifications

	Average ranking	LPs	Consumers	SMEs	MPs/Senedd	OLs
High standards	1st	1	1	1	1	5
Transparent cost structures	2nd	3	3	2	2	1
LPs' training and qualifications	3rd	4	2	3	3	2
Clarity and timeliness of client comms	4th	2	4	4	7	4
Action against malpractice	5th	8	7	5	4	3
Value for money for clients	6th	5	5	8	5	8
Easy access to information for consumers	7th	6	8	7	6	7
Awareness that certain LPs are regulated	8th	9	6	6	8	6
Positive media coverage	9th	7	9	9	9	9



# **We ran a Key Drivers Analysis (KDA) to determine the relative importance of drivers determining confidence and trust.**

KDA is a regression technique which provides robust and strategic insights. The analysis helps to get to the bottom of knotty relationships, which respondents may otherwise struggle to consider with standard questioning.

We explored the relative impact which eleven independent variables have on Consumer trust in legal services.

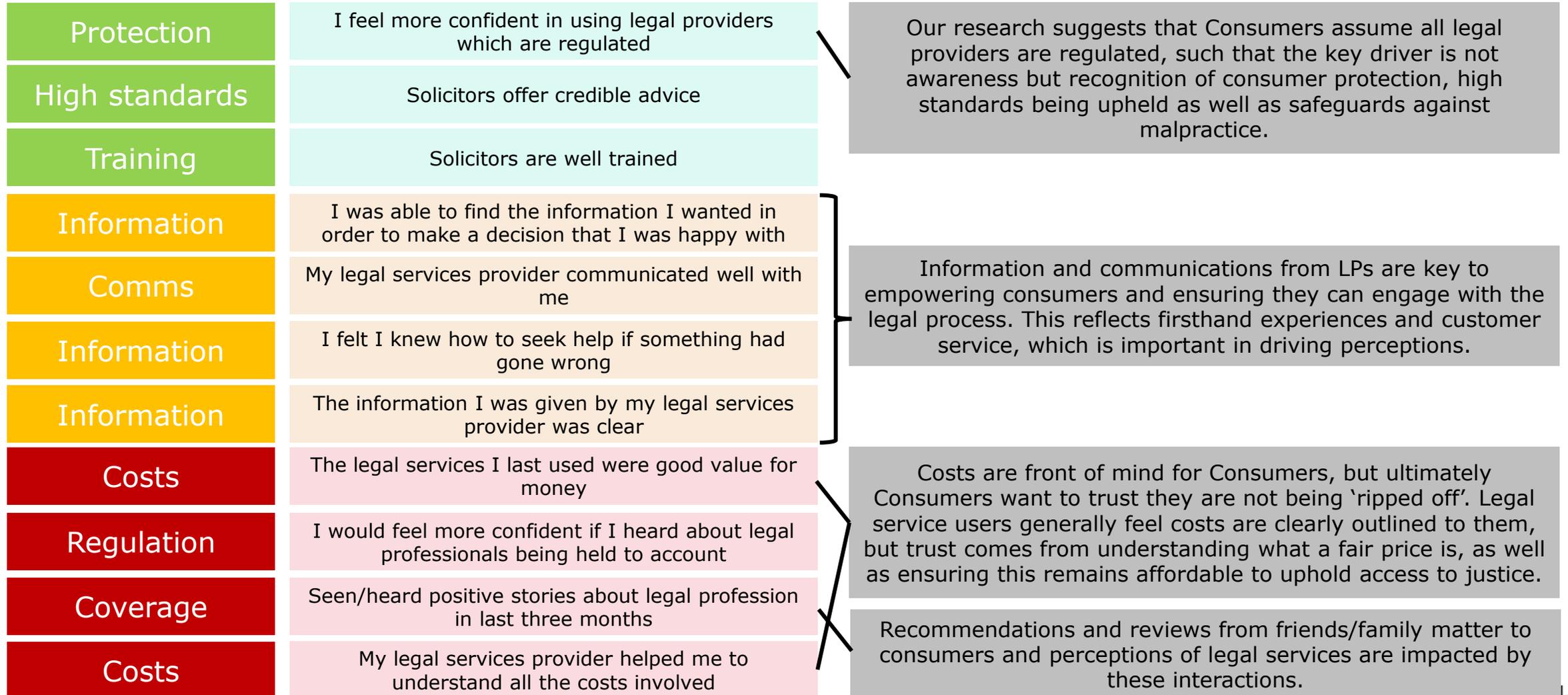
# Key Drivers Analysis confirms the importance of high standards, training, info, comms, costs & regulation

Protection	I feel more confident in using legal providers which are regulated	7.8%
High standards	Solicitors offer credible advice	3.2%
Training	Solicitors are well trained	2.9%
Information	I was able to find the information I wanted in order to make a decision that I was happy with	2.4%
Comms	My legal services provider communicated well with me	2.2%
Information	I felt I knew how to seek help if something had gone wrong	2.2%
Information	The information I was given by my legal services provider was clear	2.1%
Costs	The legal services I last used were good value for money	2%
Regulation	I would feel more confident in legal services generally if I heard about legal professionals being held to account if they commit malpractice	1.9%
Coverage	Seen/heard positive stories about legal profession in last three months	1.4%
Costs	My legal services provider helped me to understand all the costs involved	1.1%

Using a Key Driver Analysis, we have identified the relative importance of factors in relation to Consumers' trust in legal services.

Results are presented as % share of importance. Shares are weighted relatively, such that perceptions that solicitors are well trained is twice as important as hearing positive stories. Nonetheless, all factors were statistically significant indicating all factors are important.

# Drivers of trust are nuanced and interlinked





# SRA's role in confidence and trust

---

# Perceptions of the SRA's role in confidence & trust

There are variations in perceptions of the SRA's performance and how it impacts confidence and trust by audience...

**Legal Professionals** feel that the SRA's regulation is important for driving confidence and trust, but some express **concerns about proportionality**, such as suggesting that the SRA is too punitive towards minor infractions. Others feel that the SRA's enforcement is too 'reactive'.

**Opinion Leaders** have a mixed perspective on the SRA's current performance. Some feel that the **SRA is performing well and providing leadership**. Others raise **concerns about proportionality**. Conversely to Legal Professionals, some feel the SRA is not proactive enough/ not taking sufficient action, particularly focusing on SRA's responses to potentially major regulatory issues (e.g. Axiom Ince, Post Office).

**Consumers** have very limited knowledge of the SRA's existence, though they assume that legal services are regulated.

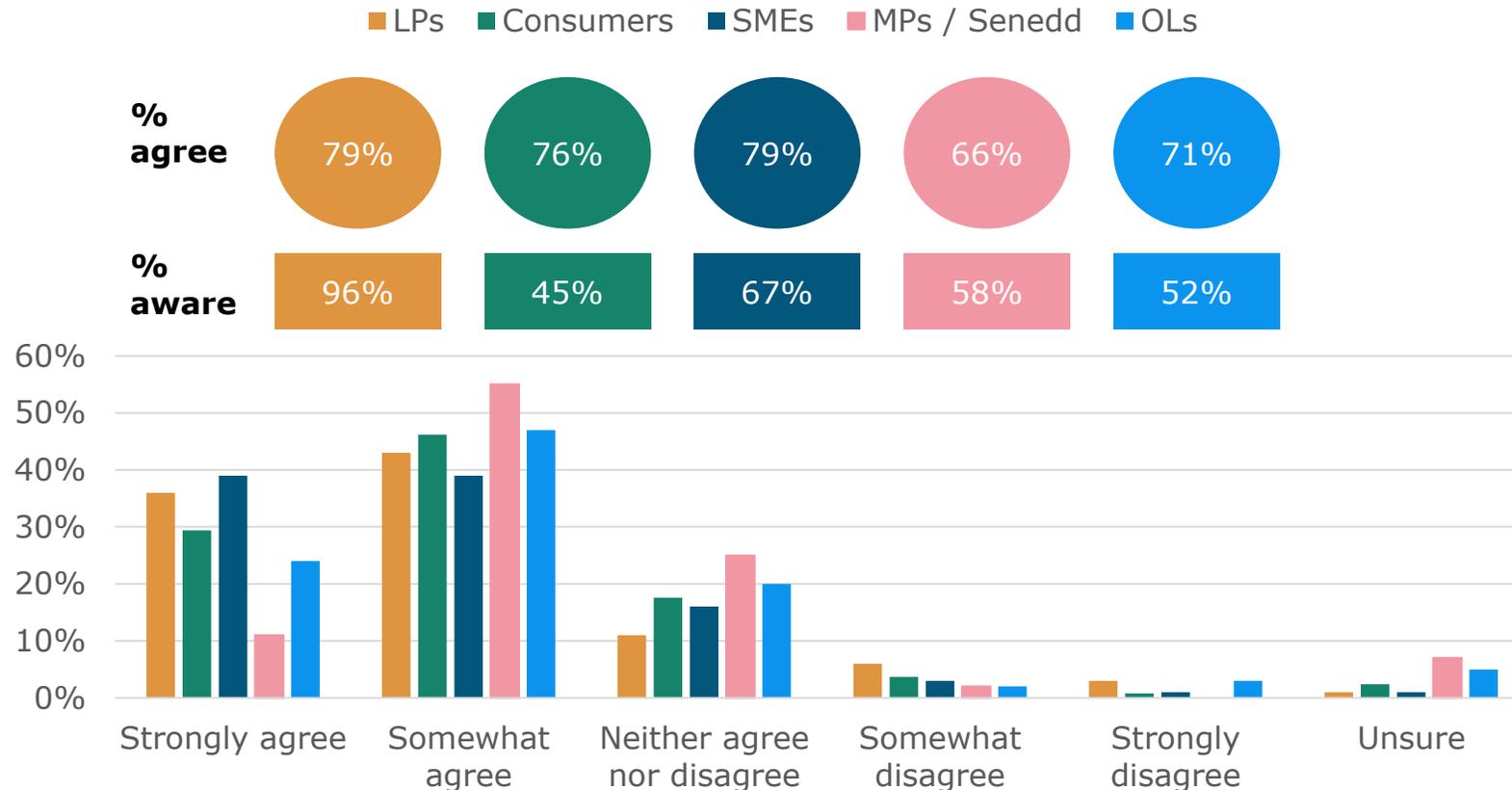
For Consumers, simply **knowing that regulation exists can be reassuring**.



# All audiences believe it is the SRA's role to drive confidence and trust in legal services

## It is the SRA's role to build confidence and trust in legal services

(asked to non-LP audiences who have some awareness of the SRA)



There are **no significant differences** in agreement levels between Consumers and SMEs who **hold high and low levels of awareness** of the SRA, indicating a consensus on expectations of the SRA's role.

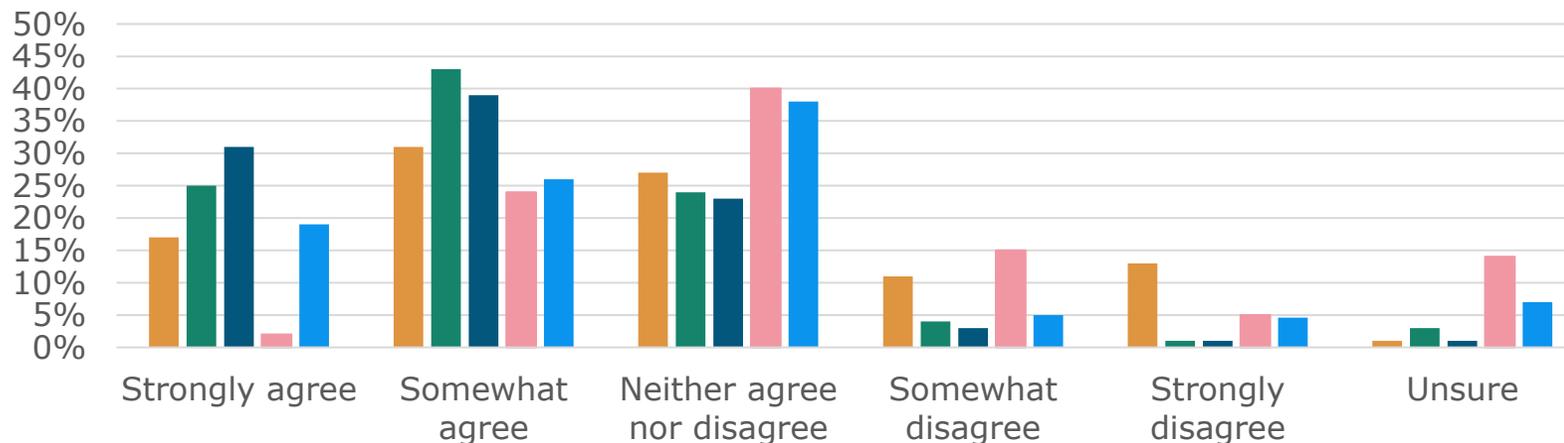
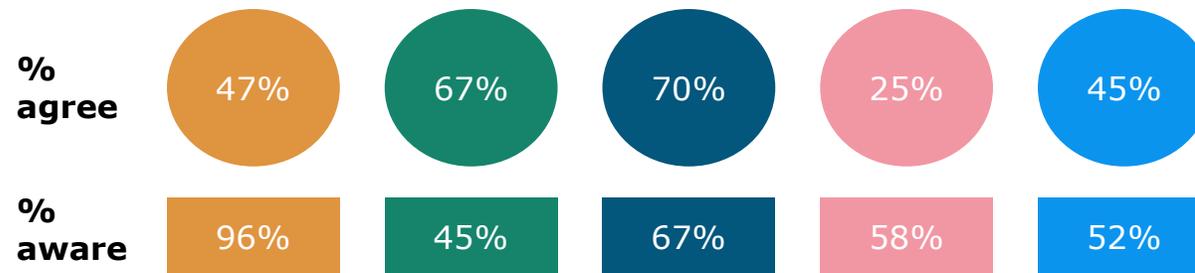
A third of Legal Professionals who disagree that the SRA's activity has increased their confidence and trust in legal services also disagree that it is the SRA's role to do so (29%).

# Consumers and SMEs are most likely to agree that the SRA's activity has increased their confidence and trust

## The SRA's activity has increased my confidence and trust in legal services

(only asked non-LP audiences who have some awareness of the SRA)

■ LPs ■ Consumers ■ SMEs ■ MPs / Senedd ■ OLs



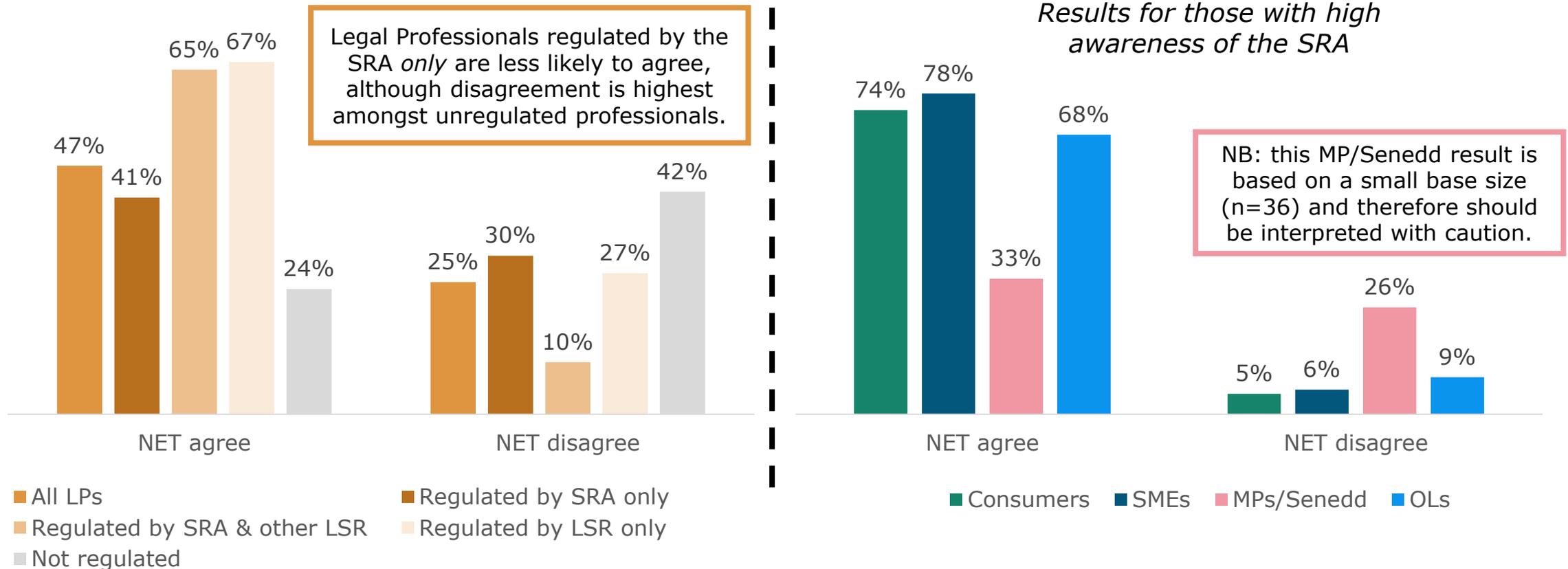
While only 45% of Consumers are aware of the SRA, they hold **positive perceptions** – two thirds agree that the SRA's activity has increased their confidence and trust. This agreement may reflect a positive perception of legal services more broadly and recognition that legal regulators have played a key role in this.

Legal Professionals are the audience most likely to disagree (25%), increasing to 33% for solicitors specifically. Nonetheless, 47% of legal professionals still agree the SRA's activity increased their confidence and trust.

MP/Senedd Members and Opinion Leaders indicate largely **neutral sentiment or uncertainty** (54% and 45%).

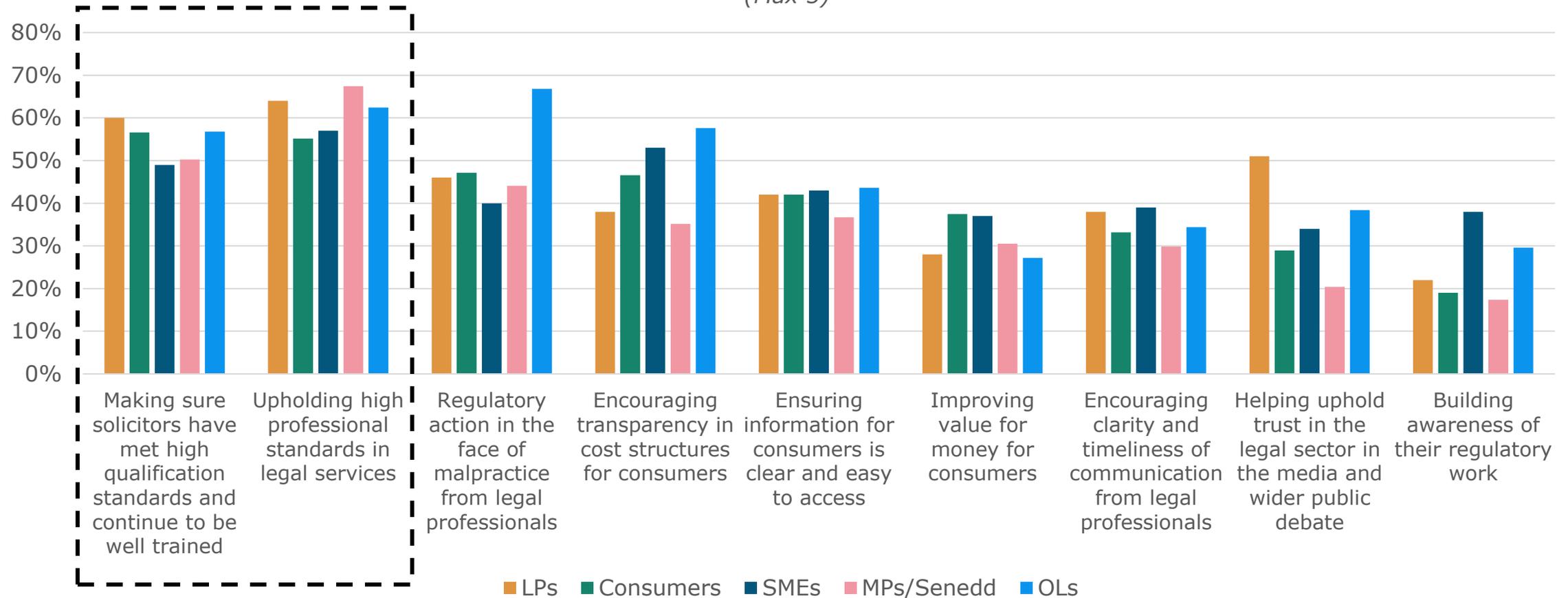
# Agreement increases for non-Legal Professional audiences with high awareness of the SRA

The SRA's activity has increased my confidence and trust in legal services



# The SRA upholding high professional standards and qualifications and training are particularly important

Factors most important for the SRA to play a role in  
(Max 5)



# Stakeholders hold similar perceptions of which factors the SRA should play a role in

Audiences were asked to rank which factors the SRA should play a role in to support confidence and trust. An average 'all audience' ranking has been calculated, using a sum of ranks.

## The four areas which consistently appear in all audiences' top five:

- Upholding high professional standards in legal services
- Making sure solicitors have met high qualification standards and continue to be well trained
- Encouraging transparency in cost structures for consumers
- Regulatory action in the face of malpractice from legal professionals.

	Confidence and trust driver ranking	Average SRA ranking	LPs	Consumers	SMEs	MPs/Senedd	OLs
High standards	1	1	1	1	1	1	2
LPs' training and qualifications	3	2	2	2	3	2	4
Action against malpractice	5	3	4	4	5	3	1
Transparent cost structures	2	4	5	3	2	5	3
Easy access to information for consumers	7	5	9	5	4	4	5
Clarity and timeliness of client comms	4	6	6	7	6	7	7
Positive media coverage	9	7	3	8	9	8	6
Value for money for clients	6	8	7	6	8	6	9
Awareness that certain LPs are regulated	8	9	8	9	7	9	8

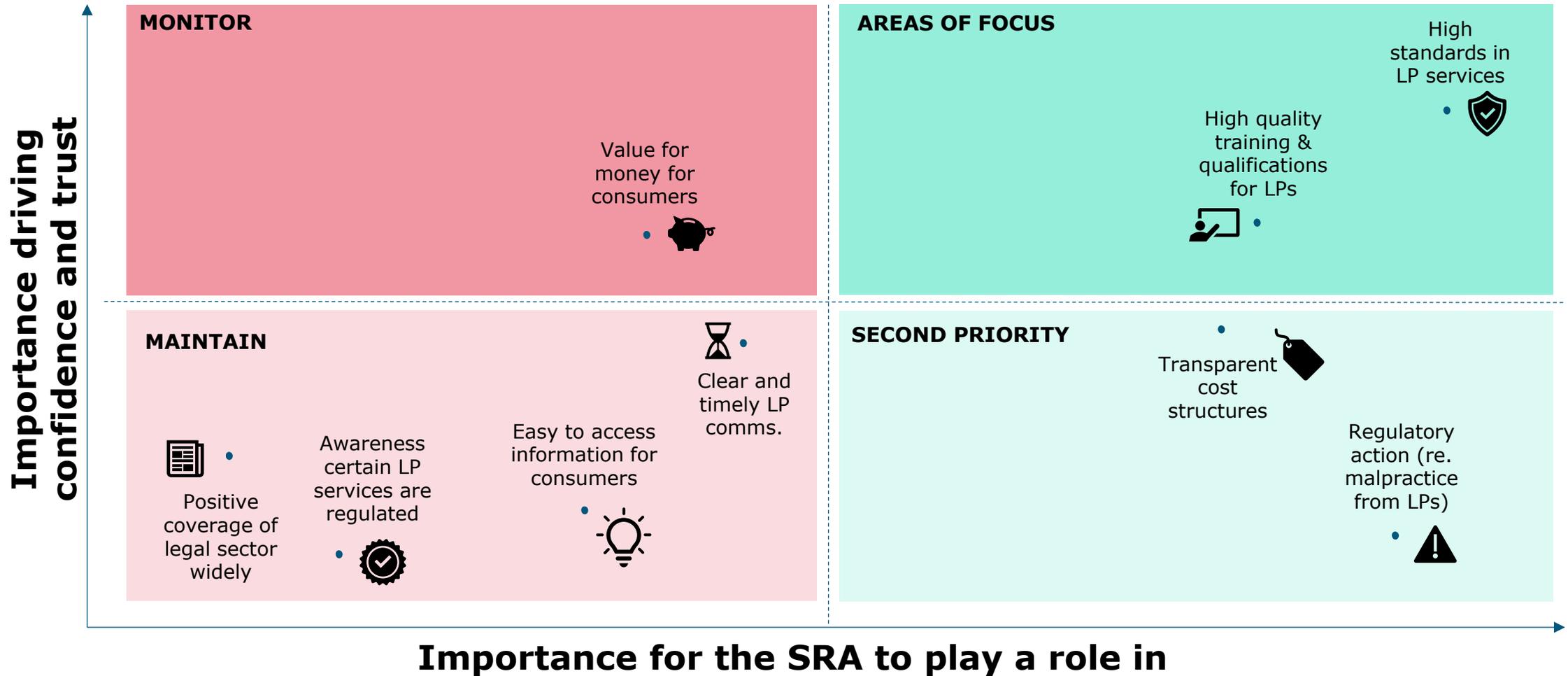
# The nine drivers are arranged in a matrix based on their importance to audience groups, and the strength of their association with SRA

After testing the impact of factors in relation to driving confidence and trust in legal services, we then explored this alongside which factors audiences believe are most important for the SRA to play a role in, to support confidence and trust. Results have been plotted on the below matrix.



# Confidence and trust matrix

Using an average 'all audience' ranking developed through a sum of ranks, we have plotted the nine drivers to illustrate which factors the SRA should consider a strategic priority in order to increase confidence and trust in legal services.



# The SRA's regulatory action has increased Legal Professionals' confidence and trust

**Impact of the SRA's work on LP's confidence and trust**  
*(Asked to Legal Professionals who are aware of the SRA)*



Overall, awareness is lowest amongst junior professionals, who have been in the profession for less than five years, as well as those who feel more negatively about the SRA's reputation.

# Consumers and SMEs unsure how the SRA could do more to drive confidence and trust, but have some ideas

## Consumers

- Raising profile of the SRA (5%)
- Internal transparency / standards (5%)
- Improving consumer information (4%)
- Affordability and cost transparency (3%)
- Enforcement and proactivity (3%)
- Improving training and qualification process (1%)
- **Don't know (74%)**

## SMEs

- Internal transparency / standards (18%)
- Raising profile of the SRA (11%)
- Improving consumer information (7%)
- Enforcement and proactivity (4%)
- Affordability and cost transparency (3%)
- Tech and innovation (2%)
- Improving training and qualification process (1%)
- **Don't know (57%)**

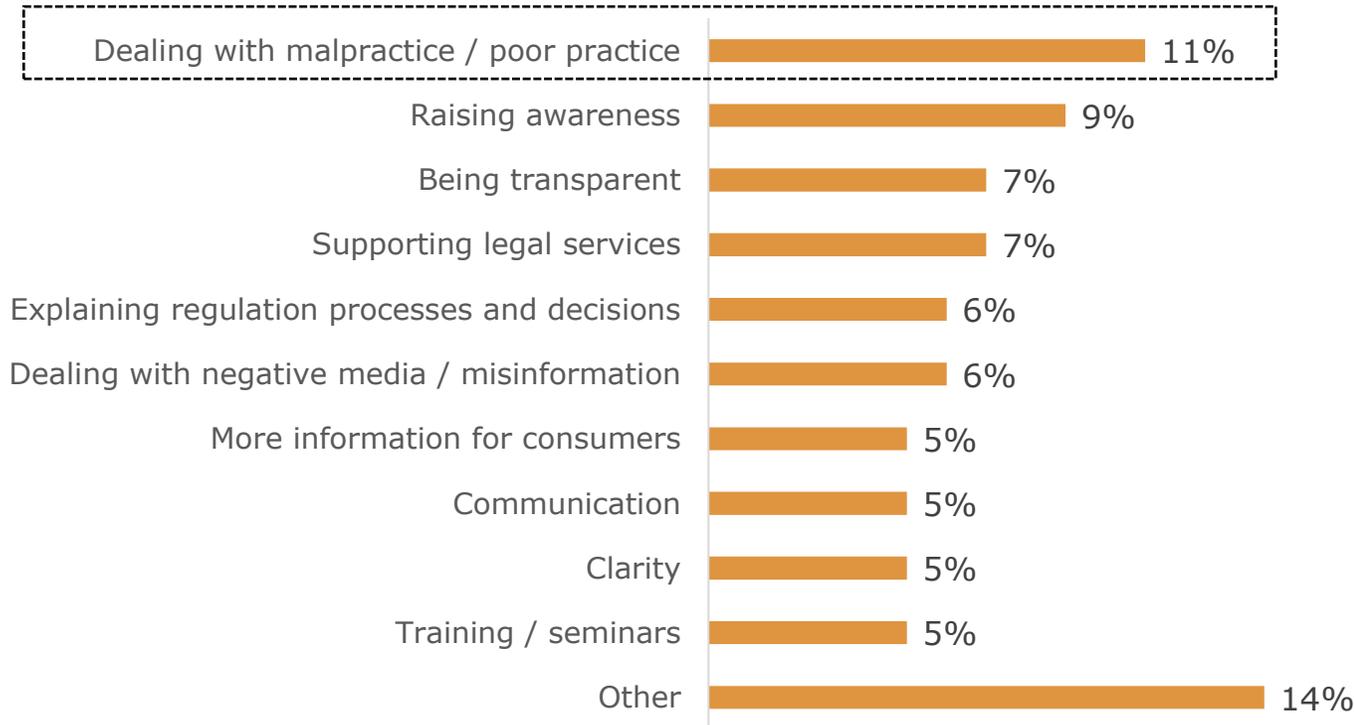
The majority of Consumers (74%) and SMEs (57%) are not sure what the SRA might be able to do to further drive confidence and trust in legal services, perhaps reflecting **limited awareness** of the SRA's role or current activity among these audiences.

Exploratory findings indicate that **knowledge of the existence of a regulator drives confidence and trust** for these audiences, **even if they are not confident to speculate** on how the SRA can **further drive confidence and trust**.

Internal transparency and standards reflects a desire to better understand and demystify the steps and processes involved in the legal work, to help users better engage.

# Dealing with malpractice matters to Legal Professionals, but opinions are complex

**Expectations for the SRA to further drive confidence and trust in legal services**  
*Showing open text coded responses >4% from LPs*



Qualitatively, LPs are divided when it comes to **dealing with malpractice**. It is seen as a core area of the SRA's remit, although some are critical of what they see as zealous enforcement (particularly for 'smaller' infractions).

Some contrast this with perceptions that the SRA is slow or weak when it comes to identifying and dealing with major regulatory issues, such as the Axiom Ince, SBB and Post Office scandals.

As such, there tends to be a demand for more proactive monitoring (as opposed to a blanket increase in enforcement) to drive confidence and trust from this audience.

*"The SRA do seem to be pretty slow with a lot of things as well. I think these things we've been talking about, Axiom Ince and SSB don't give you a great deal of confidence that they really know what they're doing."*  
 - Legal professional



# Deep dives into the factors driving confidence and trust

# Exploring factors which drive confidence and trust in legal services and the SRA's role in enhancing them

The following sections will unpack factors which drive confidence and trust in legal services in more detail, including qualitative insights which provide context to results.

Each section includes a confidence and trust matrix which plots each audience's ranking of specific drivers, to illustrate what the SRA should consider a strategic priority to increase confidence and trust in legal services for these drivers.



Legal Professionals



MPs and Senedd



Consumers



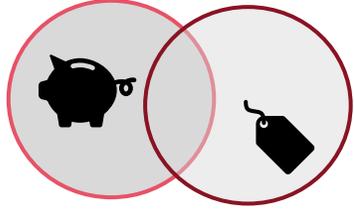
Opinion Leaders



SMEs

Factors impacting on confidence and trust	Factors important for the SRA to play a role in to support confidence and trust
High standards in legal professional services	Upholding high professional standards in legal services
Legal professionals who have undertaken high quality training and qualifications	Making sure solicitors have met high qualification standards and continue to be well trained
Regulatory action in the face of malpractice from legal professionals	Regulatory action in the face of malpractice from legal professionals
Transparent cost structures for consumers	Encouraging transparency in cost structures for consumers
Value for money for consumers	Improving value for money for consumers
Clarity and timeliness of communication from legal professionals to their clients	Encouraging clarity and timeliness of communication from legal professionals
How easy it is for consumers to access clear information about legal services	Ensuring information for consumers is clear and easy to access
Awareness that certain legal service providers are regulated	Building awareness of their regulatory work
Positive coverage of the legal sector in the media and wider public debate	Helping uphold trust in the legal sector in the media and wider public debate

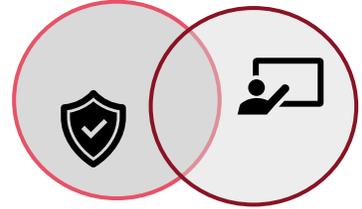
# Factors are interlinked and will likely drive confidence and trust *together* rather than in isolation



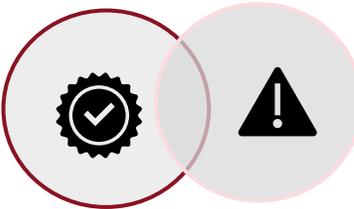
## Value for money & Transparent cost structures

Although legal services are widely perceived as expensive (and for many, *too expensive*), there is an expectation that legal services will not be cheap. The combination of **value for money** (i.e. affordable and appropriate prices for services received) and communicating these **cost structures transparently** (i.e. clear and fixed prices, in line with fair industry rates) will together drive confidence and trust.

## High standards in LP services & High quality training and qualifications for LPs



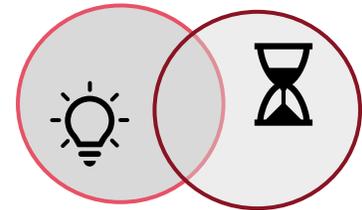
As a widely-respected profession, solicitors are believed to be well trained and knowledgeable by all stakeholders. Communicating how **high standards within legal services** are achieved *and* maintained will drive clients' confidence and trust in the legal services advice they receive. There is an understanding that high standards are a product of extensive **training and qualifications for LPs**. Clients broadly want to know that the expensive advice and services they purchase is truly specialist and informed by extensive training.



## Regulatory action against malpractice & Awareness certain LPs are regulated

Consumers **assume all legal providers are regulated** therefore awareness of this in the first instance is less impactful. They recognise the importance of a regulator's role, and confidence and trust is increased by knowledge that misconduct is dealt with appropriately. Encouragingly, findings suggest **increased awareness of the SRA** increases confidence that regulatory action against malpractice is happening.

## Easy to access information & Clear and timely communications for LPs to clients



Demystifying legal language is an important way to empower clients throughout legal processes. Providing **easy to access information** (most importantly around pricing structures and what to expect from their legal provider) will increase clients' confidence and trust to make informed decisions. In turn, legal providers see it as their responsibility to **communicate with their clients in a clear and timely manner**. Having easy to access information on what standards of communication to expect would further confidence and trust.

Positive coverage is linked to all factors, as perceptions are formed through stories shared by friends/family or in the media.



# High standards in LP services



# High standards in legal professional services

High standards in legal professional services is seen as the **most important driver** of confidence and trust by most groups. It's seen as the **outcome of high entry standards** to the profession, a high standard of training and professional pride.

Our exploratory work identified that there's a need for these high standards because solicitors' clients generally **don't know enough about legal services** to judge the level of service they're receiving, and so a set of standards which solicitors are held to is very important.

For this reason, high standards are seen as key for the SRA to focus on in order to drive confidence and trust. In particular, ensuring a **high standard of training**, and **taking action when there is malpractice** are key to these standards.

In this way, this driver is **inherently linked** with others which are also seen to be important for confidence and trust in legal services.



1st

Driver of  
confidence  
and trust

1st

SRA  
role

*"Really the focus of the SRA should be setting standards and making sure they're complied with."*

- Legal Professional

# High standards in legal professional services



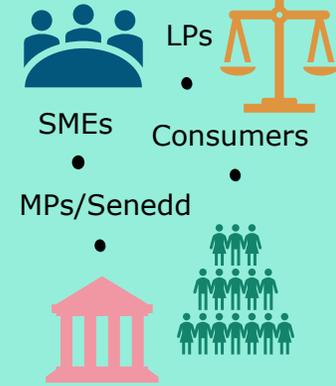
High standards is the driver with the most consensus between stakeholder groups, considered crucial to driving confidence and trust and seen as the outcome of high entry standards. OLS see protecting consumers, by taking action when there is malpractice, as slightly higher on the SRA's list of priorities than high standards, perhaps reflecting their understanding of a regulator and the more tangible driver of action against malpractice.

Importance driving confidence and trust

**MONITOR**

**AREAS OF FOCUS**

OLs



**MAINTAIN**

**SECOND PRIORITY**

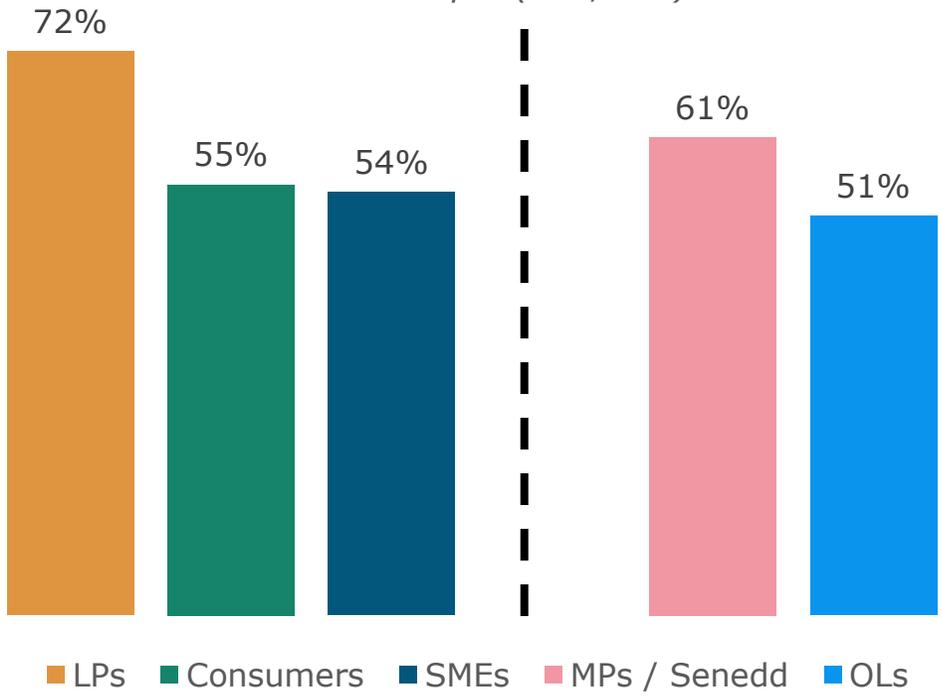
Importance for the SRA to play a role in



# All groups rank high standards as the top contributor to confidence and trust – apart from OLs

## Impact of 'High standards in legal professional services' on confidence and trust

% showing 'significant impact' (LPs, Consumers, SMEs), or selected top 5 (MPs, OLs)



Legal Professionals in particular feel that high standards are the **most important driver** of confidence and trust. Qualitatively, they see the standards of their services as being the most **visible touchpoint for consumers**, and so they feel it's a strong determinant of their levels of confidence.

All groups rank high standards as having the most impact on confidence and trust, aside from Opinion Leaders who rank it fifth out of the nine factors tested. Given that training and qualifications are the driver they rank second, their focus may be more on the the **tangible process of working up to a high standard**, rather than how that is expressed over time.



# High standards are seen as the outcome of high entry standards, excellent training and professional pride

- High standards and high-quality training and qualifications are inherently linked – among all audiences but particularly with Legal Professionals.
- Consumers observe **high entry standards** and associate legal services with intelligence and expertise.
- This is important as all stakeholders acknowledge the **knowledge gap between solicitors and clients**, and the difficulty of really knowing the quality of service being provided.

- Legal Professionals, SMEs and Opinion Leaders generally agree that legal professionals are **driven by a commitment to do the right thing, taking pride in their work** and striving for **high standards**, regardless of regulation.
- However, this view is less strongly held by Consumers. Rather, Consumers often **associate high standards with cost**, perceiving the high price of legal services as a marker of quality.

*"It's the **qualification**, and the recognition of the quality behind the qualification."*  
- Solicitor

*"I think of lawyers as being **intelligent** – it seems like a difficult job."*  
- Consumer

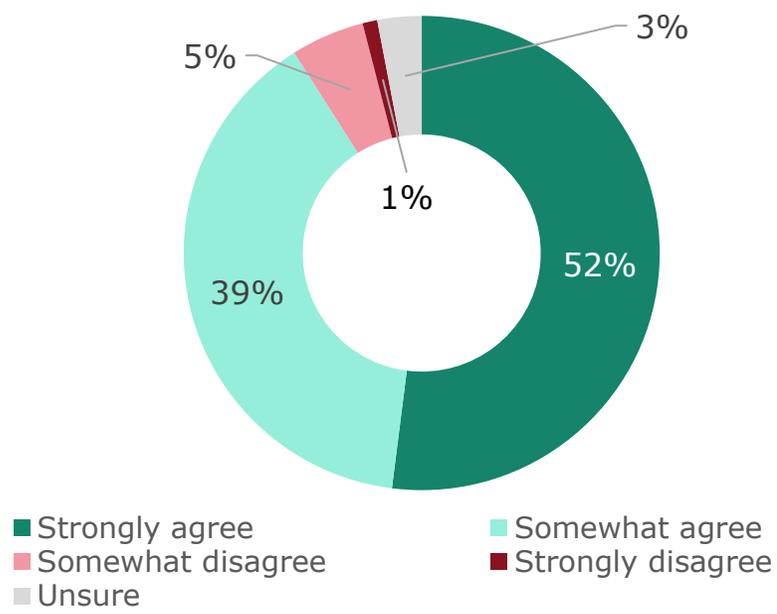
*"By and large, you have a lot of providers that put **a lot of effort in to do right** by their client."*  
- Solicitor

*"I have confidence. It's a heavily regulated industry and attracts **diligent and honest people** who want to do a good job."*  
- Opinion leader



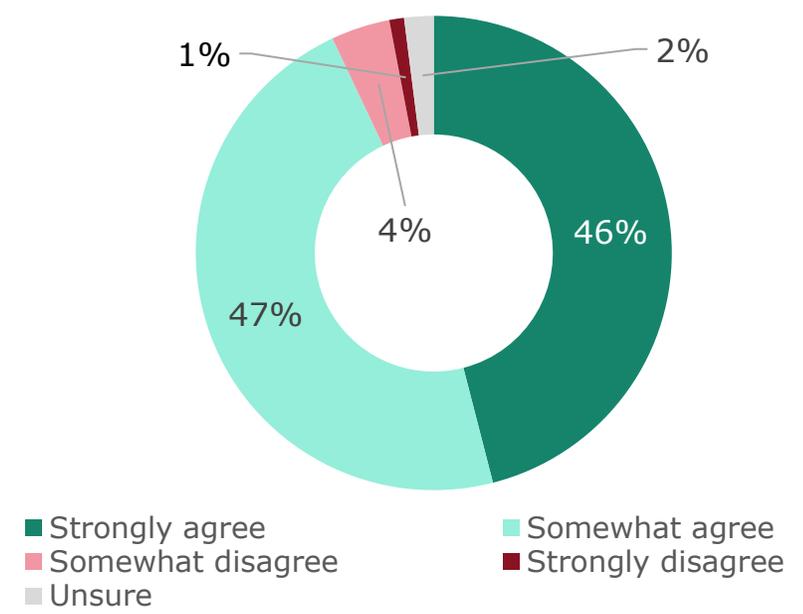
# There is strong agreement amongst Consumers that solicitors are well-respected and offer credible advice

Agreement with 'solicitors are a well-respected profession'  
% showing each option



Agreement with the perception that solicitors are a well-respected profession is widely held across key subgroups, including amongst those who have never used legal services (92% NET agree).

Agreement with 'I believe solicitors offer credible advice'  
% showing each option



Similarly, belief that solicitors offer credible advice is held across the board. There are no significant differences based on experience of legal services.



# The knowledge imbalance between Consumers and LPs further drives the importance of high standards

- Legal Professionals are mindful that most of their **clients have relatively little understanding** of the service they're providing.
- This means that they **don't have an accurate way to know whether they're receiving a good service.**
- And so high standards are important because this **knowledge imbalance necessitates trust** between the client and the legal professional.

*"An important part of my job is making the complex more simple, so that my clients can make informed decisions. They don't have the training or the knowledge I've got."*  
- Solicitor

*"Unless they are of wealthy brackets, I don't think people really understand how legal services work or how available they are to the average person."*  
- Solicitor

*"You have to trust what they're saying. You're not really sure if it's correct or not – I'm not the expert, they are."*  
- Consumer

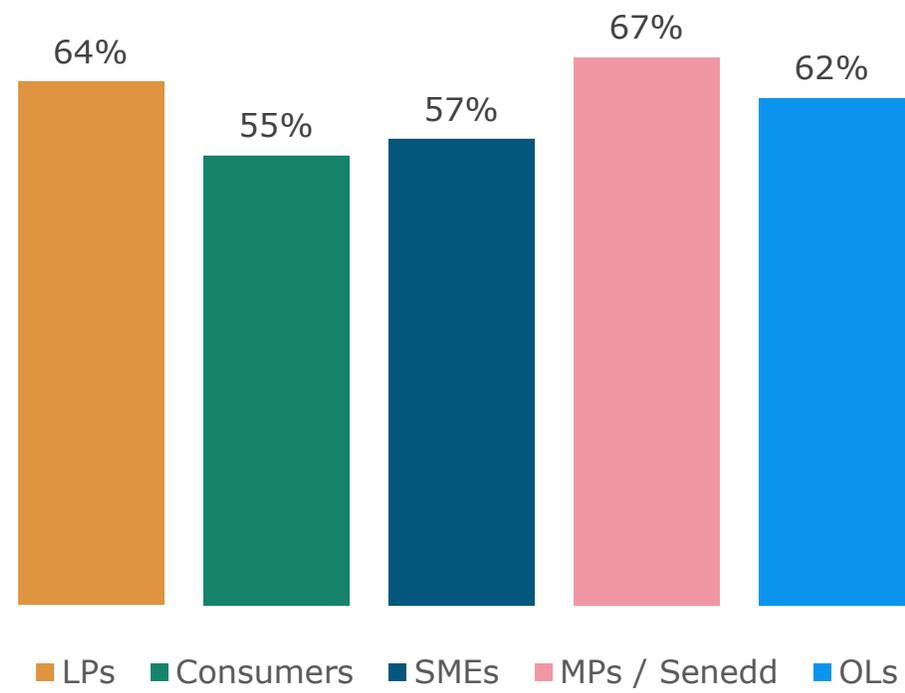
*"...you have to have trust because you don't have the information you need, and they have it."*  
- Consumer

- Consumers are just as **mindful of this knowledge imbalance**, and the trust it necessitates. While SMEs are more confident in accessing legal services, they also recognise this knowledge imbalance.
- They tend to feel that legal professionals must have gone through **difficult training and have a lot of expertise**, and so they infer high standards and respect the profession.
- When they don't feel the service they've received is of a high standard it **damages trust**, illustrating the importance of this driver.



# All groups are equally positive that the SRA should play a role in this area to drive confidence and trust

Factors for SRA to play a role in to support confidence and trust: Upholding high professional standards in legal services  
% showing selected top 5



Fundamentally, this is seen as a **key part of the SRA’s purpose** and stakeholders feel the role of a regulator in any sector is to uphold high standards.

Instances of the SRA intervening when firms break regulations are seen as **evidence** of them continuing to do this, but it’s also linked to training – although only 13% of Consumers express interest in interacting with a regulator outside the context of using legal services.

*“A regulator in legal services should be making sure there’s a consistent high standard across the industry.”*  
- Consumer

*“The role of a regulator in the context of legal services - setting standards, monitoring compliance, ensuring that the standards are fit for purpose.”*  
- Solicitor



# High quality training & qualifications for LPs



# Legal professionals who have undertaken high quality training and qualifications

Qualitatively, high **quality training and qualifications** are seen as **closely interconnected with high standards** for all audiences. As an 'input' for high standards, high quality training and qualifications can help drive confidence and trust.



Legal Professionals are clearly aware of the SRA's role in this area and see it as very much within the SRA's remit. In interviews, some are critical of the SRA's record in this area, raising concerns about the SQE and a need to protect more time for CPD.



Consumers are **broadly aware** that there is some form of qualification process for legal professionals and assume that this is sufficiently **rigorous** to contribute to confidence and trust (by contributing to high standards of competence).



Opinion Leaders and MPs and Senedd Members rank training and qualifications highly as a determinant of confidence and trust. In qualitative interviews, Opinion Leaders were highly focused on training and qualifications, identifying it as one of the core areas where SRA activity can contribute to confidence and trust.

3rd

**Driver of confidence and trust**

2nd

**SRA role**

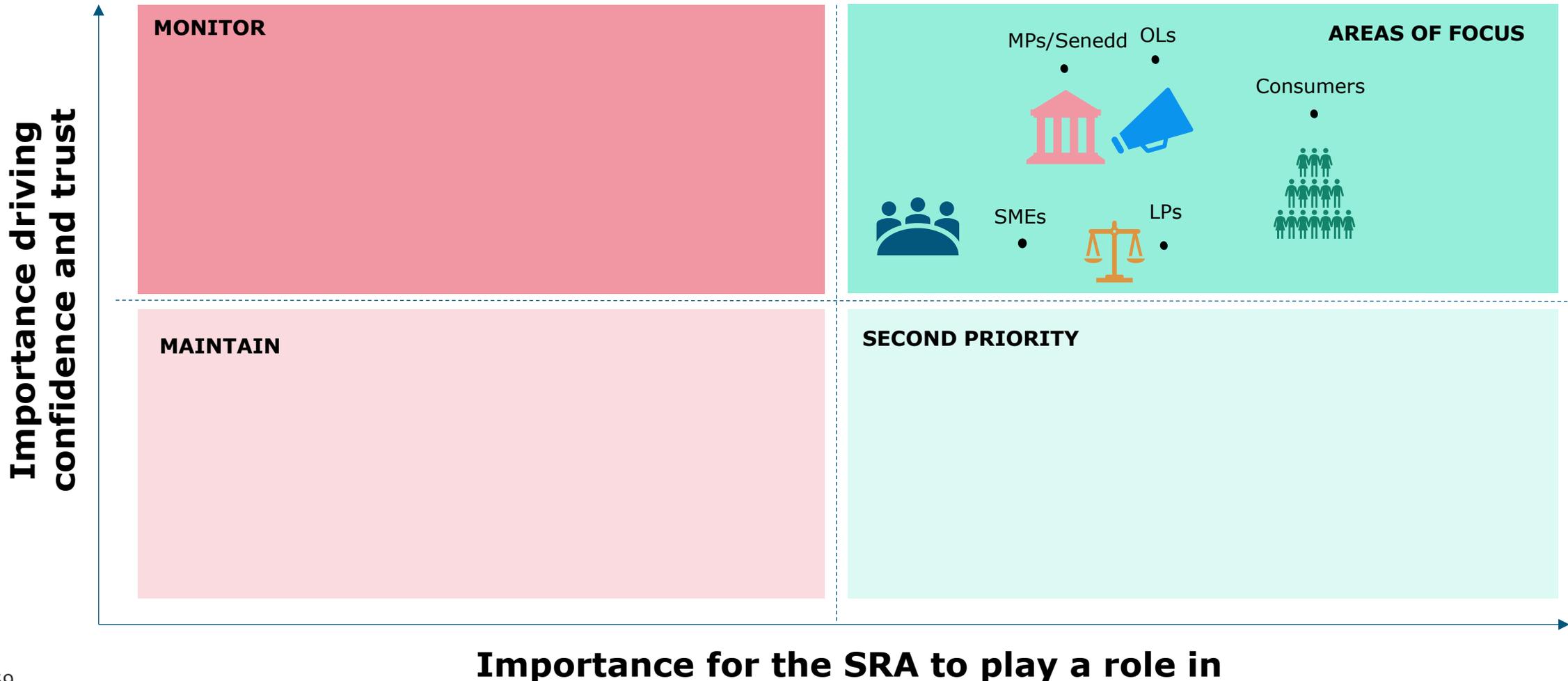
***"There's a lot of focus on the training side of it, making sure that individuals coming through the ranks are correctly trained. [The SRA] need to be able to regulate firms and make sure the services that are being delivered are to the right standards."***

**- Opinion Leader**

# High quality training and qualifications for legal professionals



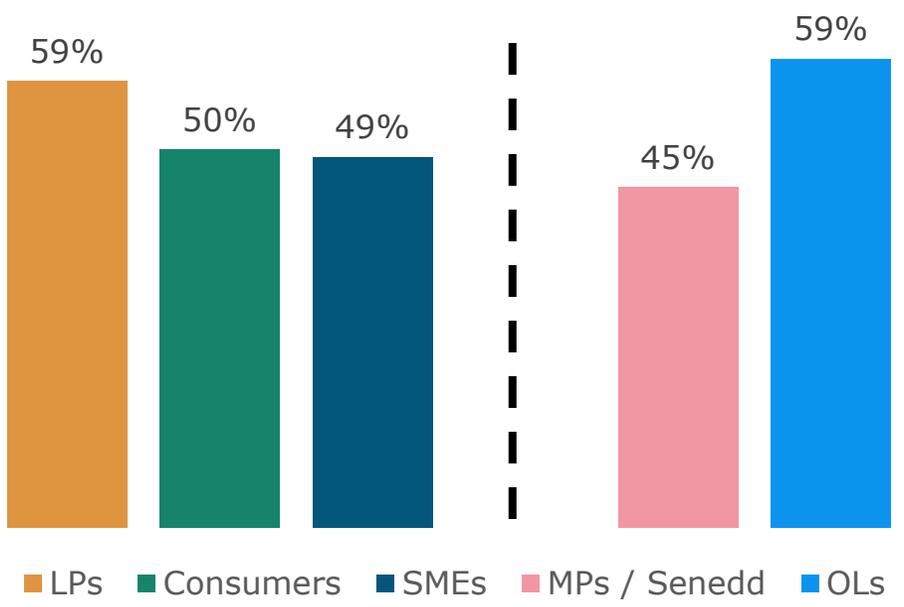
High quality training and qualifications for legal professionals is seen as a core area of focus for all groups. It is seen as a core area of the SRA's remit, and a tangible area for the SRA to improve standards, and in turn confidence and trust. However, LPs have divided opinions about what this means in practice (e.g. increased CPD, changes to the SQE).



# Training and qualifications is seen as a key area for confidence and trust

## Impact on confidence and trust: High quality training and qualifications for LPs

% showing 'significant impact' (LPs, Consumers, SMEs), or selected top 5 (MPs, OLS)



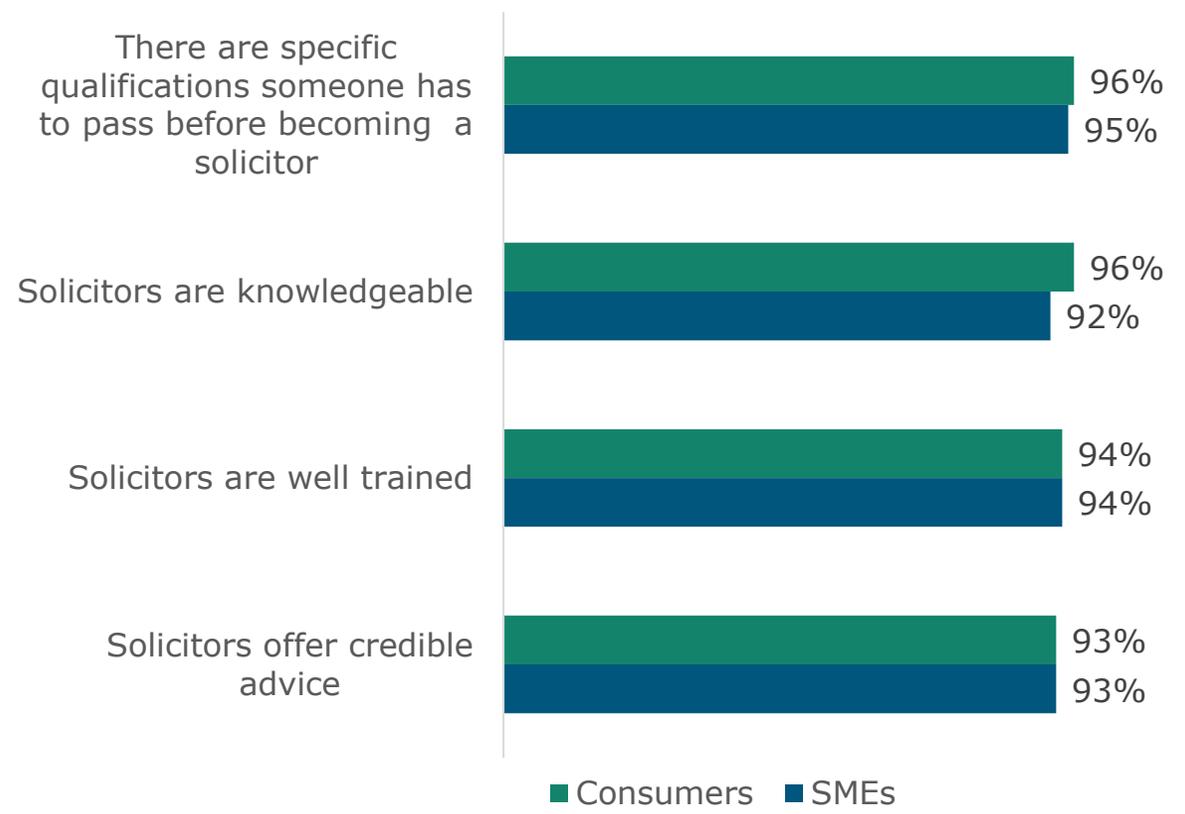
In the qualitative research, Legal Professionals and Opinion Leaders **identified training and qualifications as a tangible area that could improve confidence and trust** (for most, as a concrete way of raising standards).

**Legal Professionals** are the (joint) most likely to agree that quality training and qualifications is a key driver of confidence and trust in legal services (59%). However, LPs are the only group for which quality training and qualifications does not rank among their top three priorities.

Training and qualifications is particularly seen as important among **more experienced** Legal Professionals: 50% of those with under 10 years in the profession say it has a significant impact on confidence and trust, rising to 63% for those with 10+ years.

# Positively, nearly all Consumers and SMEs view solicitors as knowledgeable and well trained

Agreement with statements about solicitors  
Showing % somewhat/strongly agree



Nearly all Consumers and SMEs recognise that there are qualifications that must be passed.

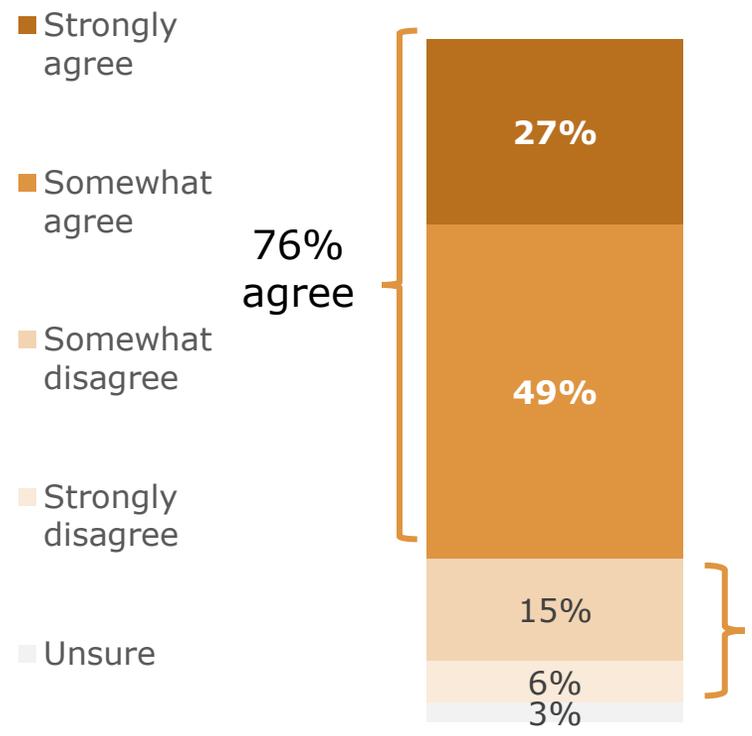
Qualitatively, Consumers have **very limited awareness of details but** assume there is some form of qualification process which is sufficiently rigorous. Like other professions, the **existence of this process helps to generate confidence and trust.**

Over half of Consumers (55%) and SMEs (54%) strongly agree **that solicitors are knowledgeable**, while 58% of Consumers and 49% of SMEs strongly agree that solicitors are well trained. There are low levels of disagreement overall.

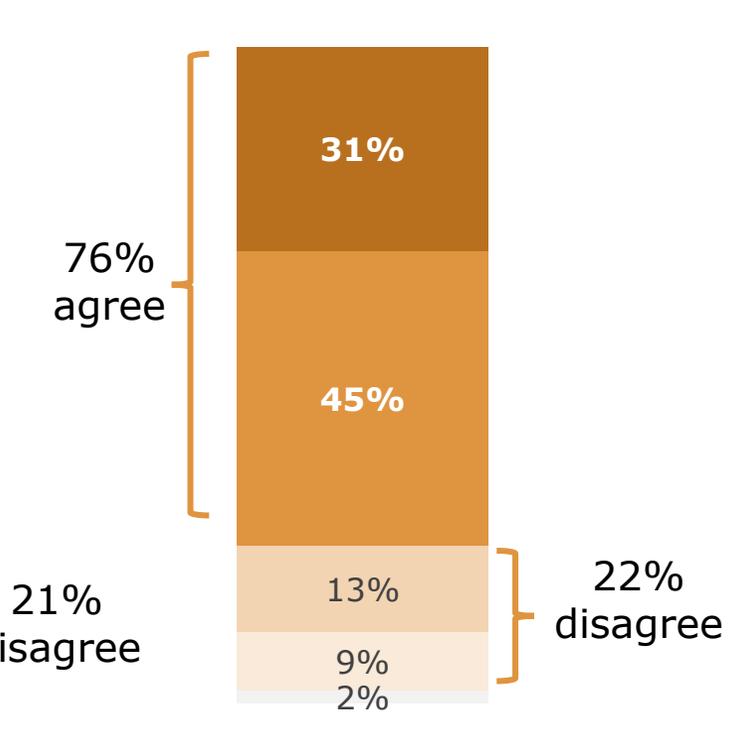
For **SMEs**, those who are heavily involved in choosing legal services are more likely to strongly agree than those who are not at all involved: 59% to 47% strongly agree that solicitors are knowledgeable, and 52% to 39% that they are well trained.

# Whilst most LPs agree qualifications prepare them for good standards of competence, one in five disagree

Agreement with 'Prepares solicitors entering the profession to good standards of competence'



Agreement with 'Ensures everyone can trust that qualifying solicitors have met the same high standard'



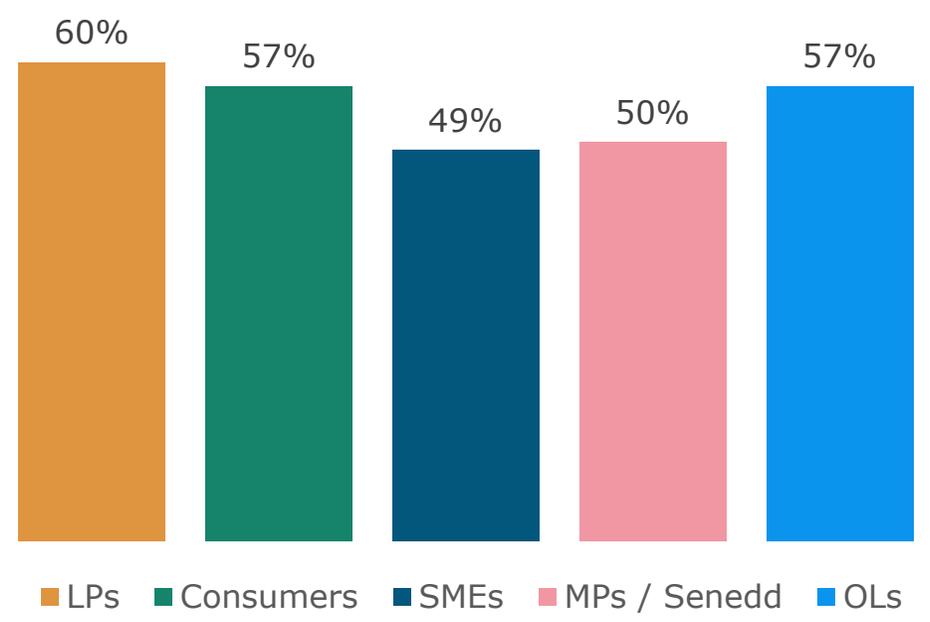
**Solicitors newer to the profession**, for whom the qualification process is a more recent experience, are more likely to agree that qualifications prepare them for good standards of competence.

88% who have worked for **fewer than five years agree** that qualifications prepare solicitors to good standards of competence, falling to 82% for those with five to ten years working in legal services and 70% for those with **10+ years** in the profession.

Qualitatively, we found that some longer-established and senior lawyers **raise questions about the standards of new trainees**, with some explicitly raising doubts about the rigour of the SQE.

# Ensuring high quality training and education is seen as a core area of the SRA's remit

Factors for SRA to play a role in to support confidence and trust:  
High quality training and qualifications for LPs  
*% showing selected top 5*



Over half of all groups except for SMEs place high quality training and qualification within their **top five priority factors** for the SRA to play a role in (49% for SMEs).

**Legal Professionals are the group most likely to prioritise training and qualifications.** This is in keeping with their sentiment in the qualitative research, emphasising that it is a **core area of the SRA's remit**. Some LPs suggested that helping to protect time for CPD (which can be difficult to find time for) may be an area where training can be improved, driving higher standards.

However, it is worth noting that there was **some criticism from LPs and Opinion Leaders regarding the SQE** (identified qualitatively). A minority express concerns that the SQE might negatively impact the standards of new qualifiers, potentially undermining confidence and trust in legal services. Those who hold strong opinions on the matter are the most critical, while those who are more supportive of the SQE tend to be less engaged with the topic.



# Regulatory action against malpractice

Monitor	Focus
Maintain	<b>Second priority</b>

# Regulatory action in the face of malpractice from legal professionals

Regulatory action is among the top three areas for the SRA to focus on to drive confidence and trust. Opinion Leaders consider this the most important area, as consumer protection is core to a regulators' role.

**Legal Professionals** are less likely to consider this a key driver of confidence and trust overall, which may reflect concerns around the enforcement and investigation process, due to **feeling 'under scrutiny'** by the SRA.

High proportions of Consumers and SMEs suggest they feel **confident** in knowing what to do if something went wrong when using legal services. Those with **high awareness of the SRA** are far more likely to feel confident, suggesting awareness (of the SRA or regulatory action) positively impacts confidence levels overall.

Those who experienced misconduct issues were more likely to have **sought informal and non-professional** help, with only 15% of Consumers reporting the situation to a legal regulator. This suggests that confidence in knowing what to do is misplaced and **more knowledge of appropriate actions** to take is needed. SMEs appear more equipped than Consumers overall.

5th

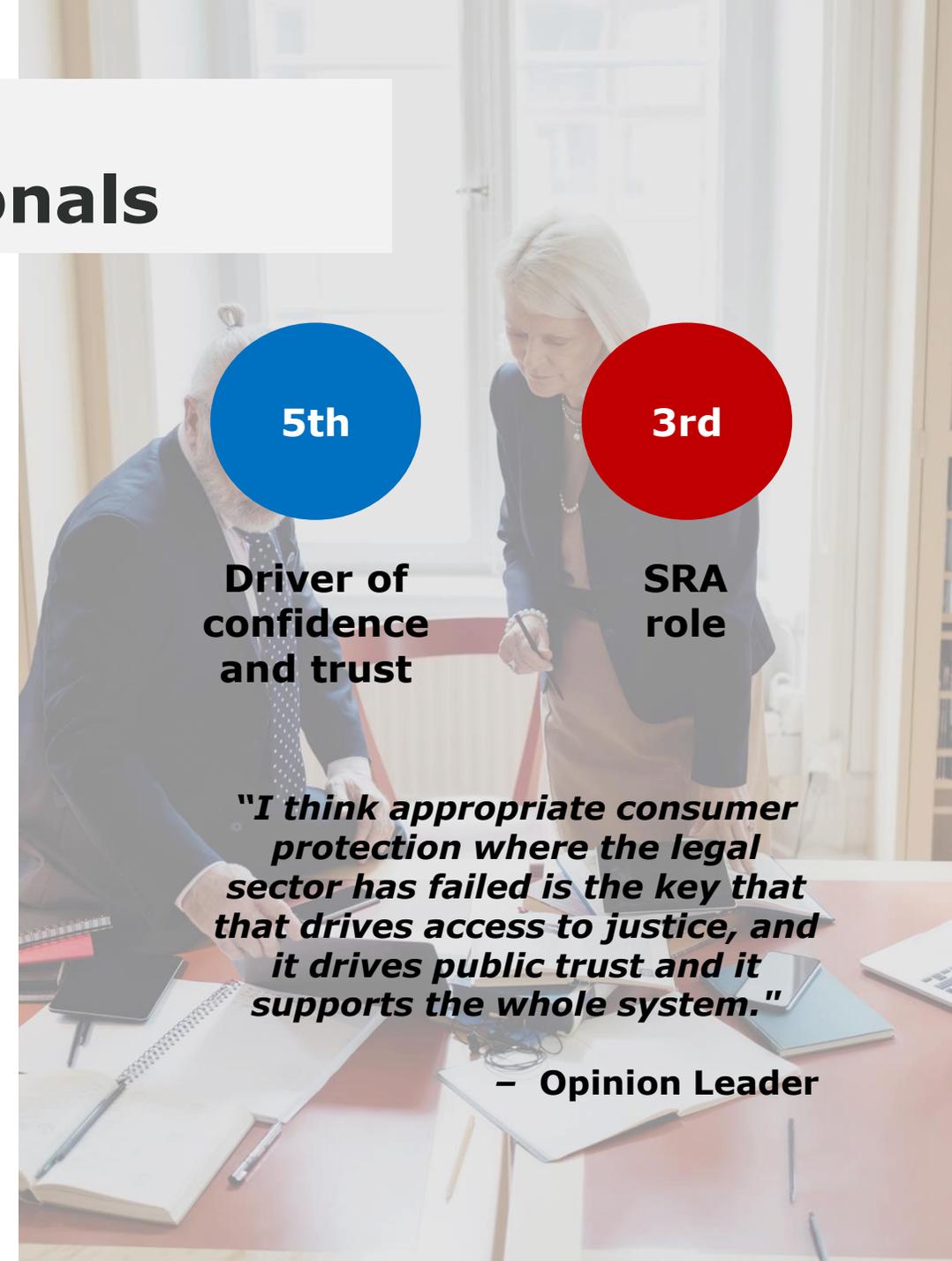
Driver of confidence and trust

3rd

SRA role

*"I think appropriate consumer protection where the legal sector has failed is the key that drives access to justice, and it drives public trust and it supports the whole system."*

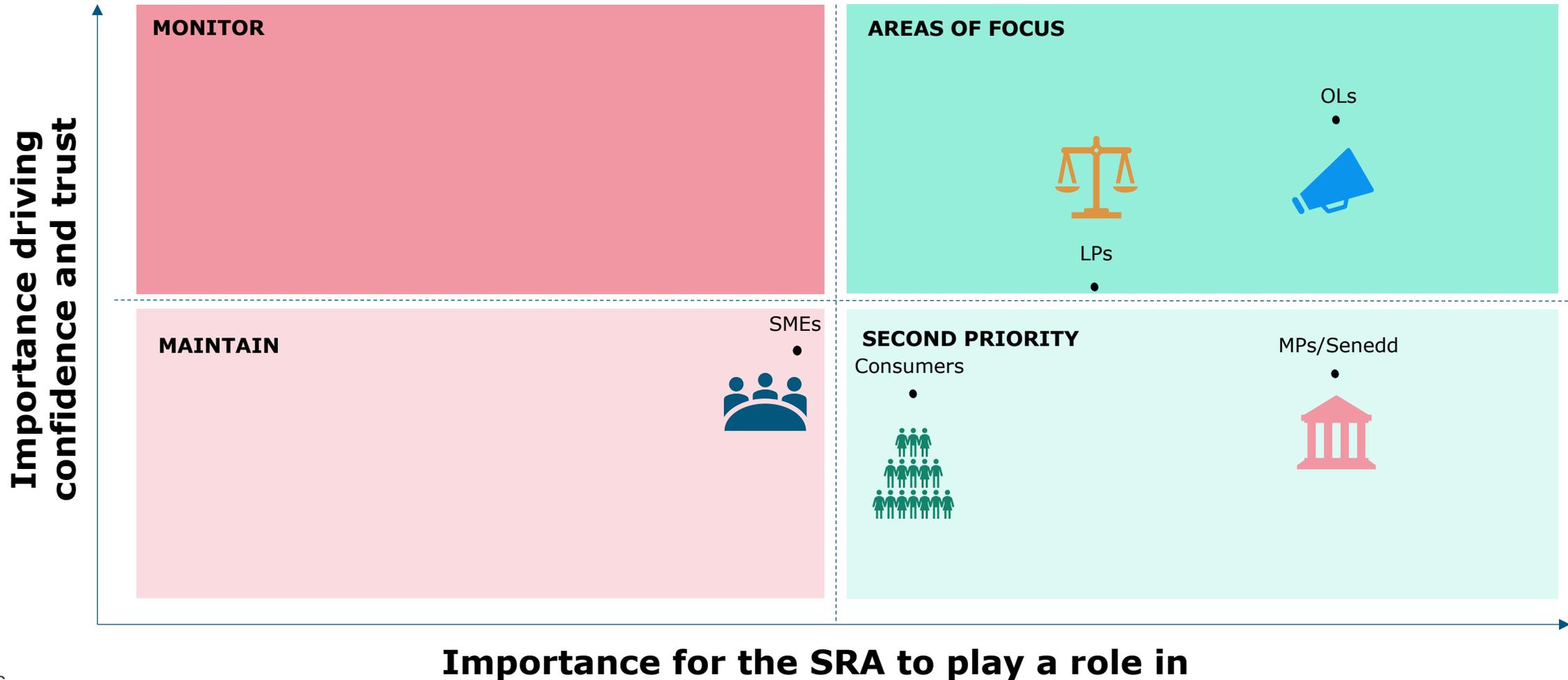
– Opinion Leader



# Regulatory action against malpractice from legal professionals

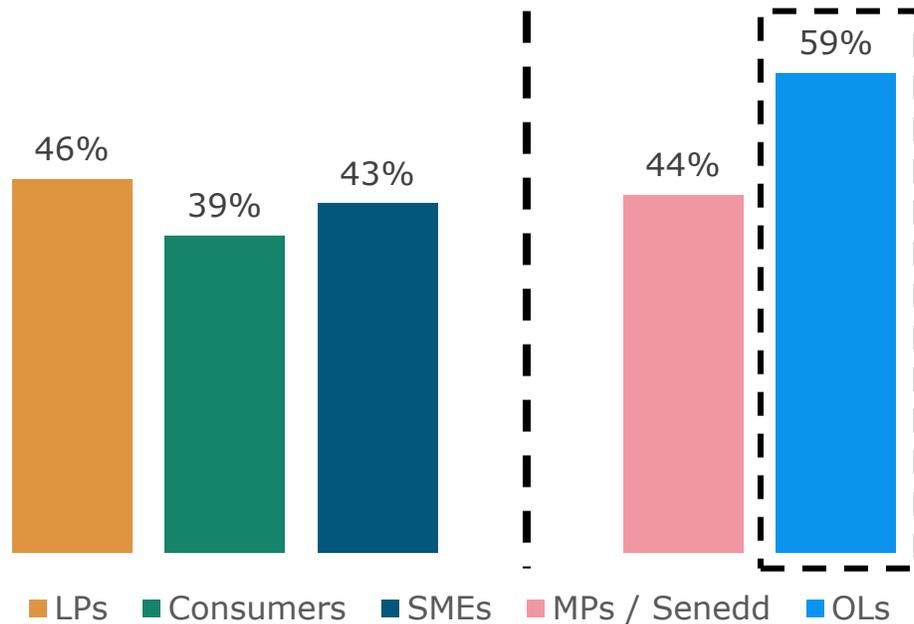


Opinion Leaders recognise that regulatory action is a key area where the SRA can have an impact. SMEs appear more equipped to tackle problems, being more likely to take the 'right' actions and feeling they received the right information and support compared to Consumers. Legal Professionals recognise the SRA can have an impact in this area but feel more negatively about the SRA's enforcement and investigation activity more broadly.



# Opinion Leaders believe regulatory action against malpractice is a key driver of confidence and trust

**Impact on confidence and trust:  
Regulatory action (re. malpractice for LPs)**  
*% showing 'significant impact' (LPs, Consumers, SMEs),  
or selected top 5 (MPs, OLS)*



Over half of **Opinion Leaders** believe regulatory action against malpractice is a key driver of confidence and trust, ranking third overall for this audience. This factor is also ranked fourth by **MPs and Senedd members**, with equal importance given across Conservative and Labour members.

**Legal Professionals** are less likely to consider this a key driver of confidence and trust overall, ranking this eighth out of nine factors. This will likely reflect that they see other factors as more important in driving confidence and trust for their clients; it may also reflect the concern raised by some that they do not trust the SRA's enforcement and investigation processes.

# Actions Consumers and SMEs *believe* they would take do not align with those taken in misconduct cases

**What *would* you do?**

**What *did* you do?**

	Consumers overall	SMEs overall	Consumers who experienced misconduct	SMEs who experienced misconduct
Get advice from friends or family	19%	15%	30%	33%
Get advice from other peers in my industry	-	21%	-	29%
Contact another legal professional	24%	32%	25%	29%
Report the situation to a regulator of the legal profession	42%	37%	15%	29%
Seek independent legal advice about taking action	-	31%	-	27%
Seek advice from Citizens Advice	40%	25%	14%	24%
Try to make an insurance claim for negligence	-	25%	-	23%
Go to the Legal Ombudsman	47%	43%	16%	23%
Post on social media	6%	8%	16%	21%
Complain to the firm/company you were using	42%	37%	24%	15%
I'm not sure / Nothing	7%	4%	12%	3%
Other	0%	1%	6%	1%

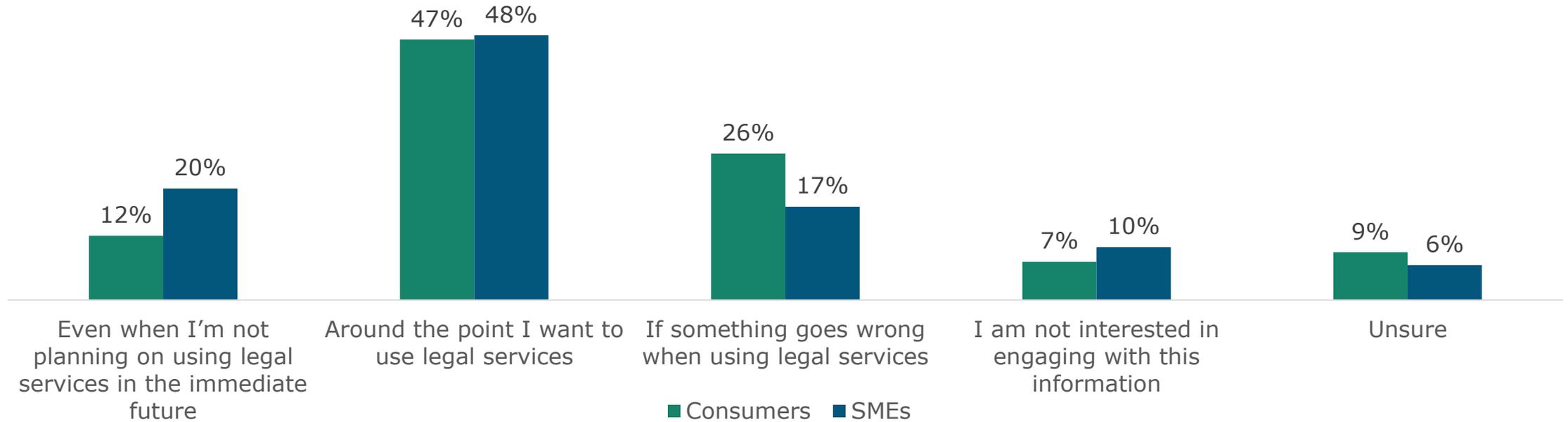
**11% of Consumers and 26% of SMEs report experiencing misconduct.**

A **disconnect** between what Consumers and SMEs believe they would do if something went wrong, compared to actions taken by those who did experience something going wrong suggests overconfidence in knowing how to get the help needed – or other barriers, such as perceived complexity of processes which may prevent this course of action.

Those who experienced issues were more likely to have sought **informal and non-professional help**. This suggests that Consumers and SMEs need more awareness, information and support to get the right help when needed.

# Consumers and SMEs would most like to engage with information about regulation when using legal services

I would want and engage with information about how legal services are regulated...



There is little difference between **Consumers** who had previously used legal services or had experience of misconduct around how they would want to engage with this information. Those with low knowledge of the SRA were most interested in engaging with information on regulation around the point of use (45%). **SMEs** who would engage even when not using legal services are more likely to be those who have previous experience of malpractice (36%) and are regular users of legal services (28%).



# Most Legal Professionals think SRA enforcement drives confidence, but they have concerns about proportionality

**Legal Professionals** feel that the SRA's regulation is important for driving confidence and trust, but some express **concerns about proportionality**, such as suggesting that the SRA is too punitive towards minor infractions. Others feel that the SRA's enforcement is too 'reactive'.

Exploratory findings identified that Legal Professionals (as well as Opinion Leaders) feel that the SRA must **respond proportionately to issues** within the legal profession – **taking action where there has been dishonesty and offering guidance where there has been a misunderstanding or confusion.**

This involves taking a stance on significant corporate issues – stakeholders refer to the Post Office Horizon scandal and Axiom Ince. **Some felt in these cases that the SRA wasn't making its stance evident enough in the face of what they saw as clear malpractice.**

Conversely, many feel that the SRA has **gone too far** in punishing solicitors for behaviours outside of their practice for which the criminal justice system has already punished them e.g. drink driving.

Despite feeling under scrutiny, 46% still consider this a key area for the SRA to drive **confidence and trust** in legal services and 71% suggest the SRA's activity has driven their own confidence and trust – reflecting nuances in perceptions.

*"I sometimes think they should have a bigger response to the big stuff, but instead they come down hard on solicitors for things like not paying train fares."*

- Solicitor



# Transparent cost structures



# Transparent cost structures for consumers



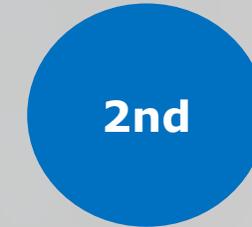
Cost transparency is considered a **key driver** of confidence and trust and an area which the SRA can have an important impact. **Consumers and SMEs** feel transparent cost structures across the board would allow them to **judge** whether the price of the legal services they choose is **fair, proportionate and in turn, good value for money.**



**Opinion Leaders** ranked transparent cost structures as **most impactful** on confidence and trust. They feel the SRA could prioritise this as part of better protecting consumers and widening access to justice.

The SRA may wish to play a role in **setting the expectation** for all consumers on what is a fair price to pay for legal services. This would help them judge whether their chosen service is **good value for money.** Signposting actions consumers can take if they feel they're being ripped off will also boost empowerment.

Given that most **recent users of legal services felt their costs were clearly presented,** the SRA could consider cementing this view more widely to those who are not regular users.



**Driver of confidence and trust**



**SRA role**

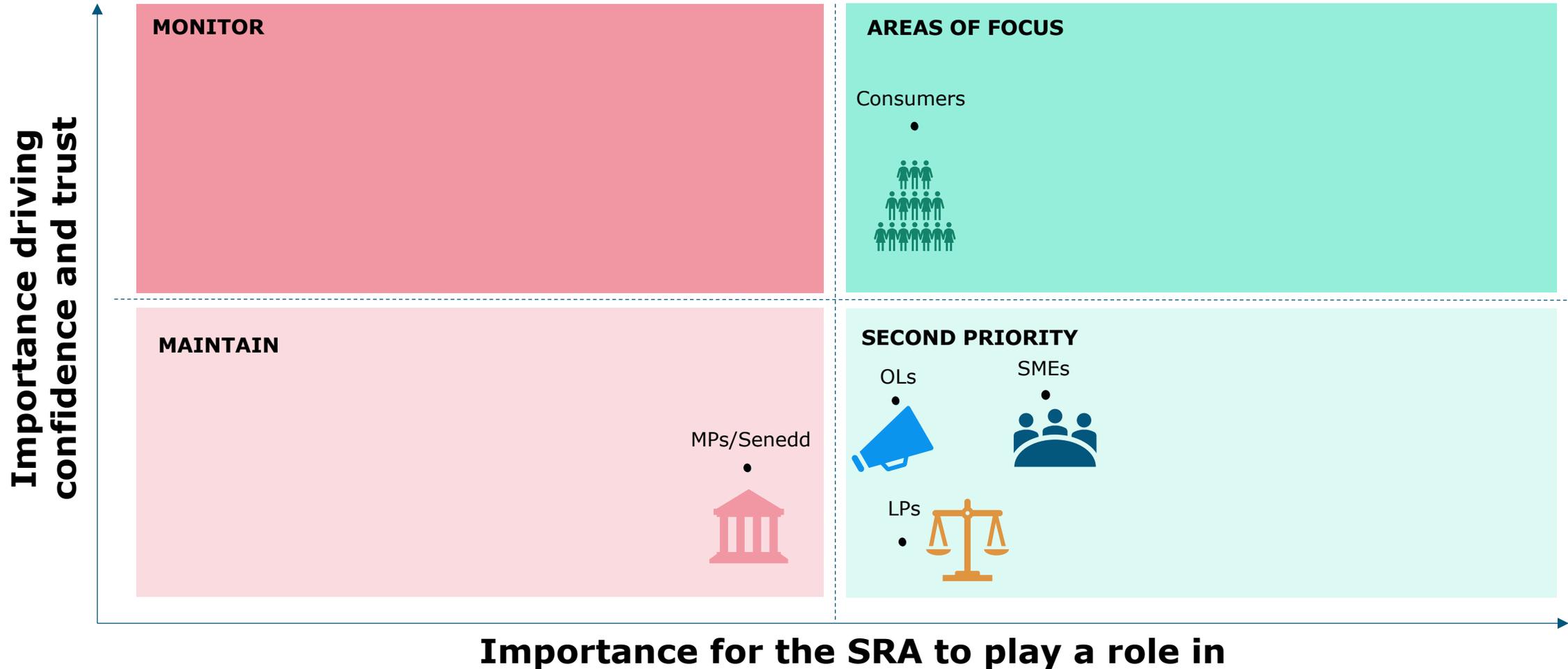
***"We should know we're not getting ripped off, and we get the best we can for these expensive services."***

**– Consumers**

# Transparent cost structures



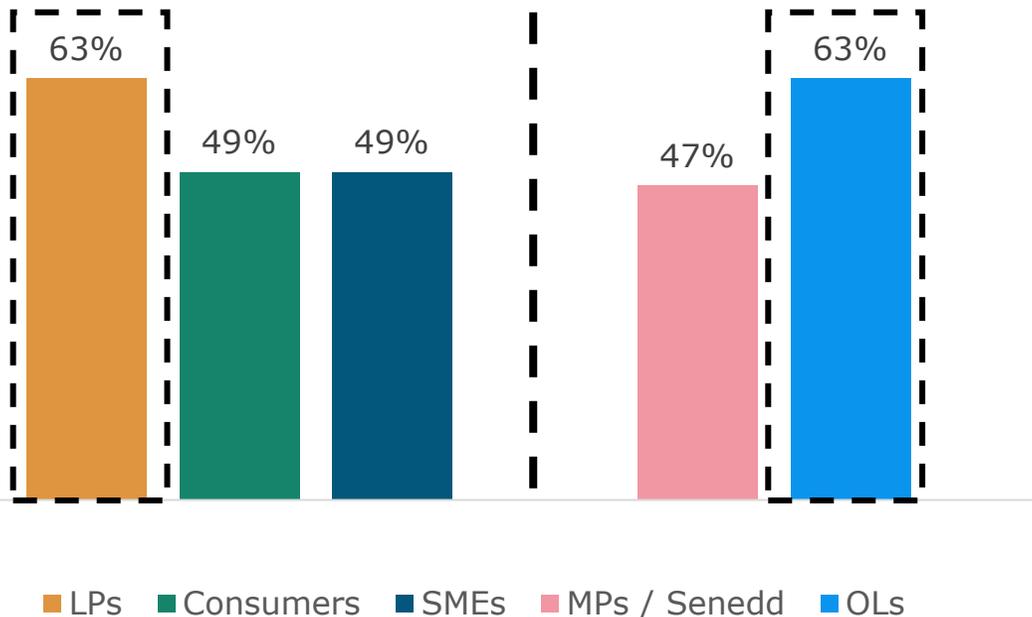
Consumers would most welcome guidance on what is an appropriate and fair cost for legal services – this is true to a lesser extent for SMEs. OLS and MPs/Senedd are likely to link cost transparency to better access to justice. LPs feel that cost transparency is even more important for those who don't usually engage with legal services.



# Cost transparency is a key driver of confidence and trust, particularly for LPs and Opinion Leaders

## Impact on confidence and trust: Transparent cost structures

% showing 'significant impact' (LPs, Consumers, SMEs),  
or selected top 5 (MPs, OLS)



There is an understanding from Legal Professionals that transparent cost structures will be key in driving confidence and trust in legal services.

When asked what would drive confidence and trust for **non-users of legal services** specifically, 31% of Legal Professionals believe affordability, transparency and clarity of costs will be most impactful – reflecting perceptions that this is considered a barrier to accessing justice.

**Opinion Leaders** ranked transparent cost structures as **most impactful** on confidence and trust, with this theme being linked to access to justice in the exploratory phase.

89% of Consumers and 87% of SMEs who have used legal services agree that their provider helped them to understand all the costs involved.



# Cost transparency is closely tied to communication, justified spend and support of those in need

## Legal costs should be:

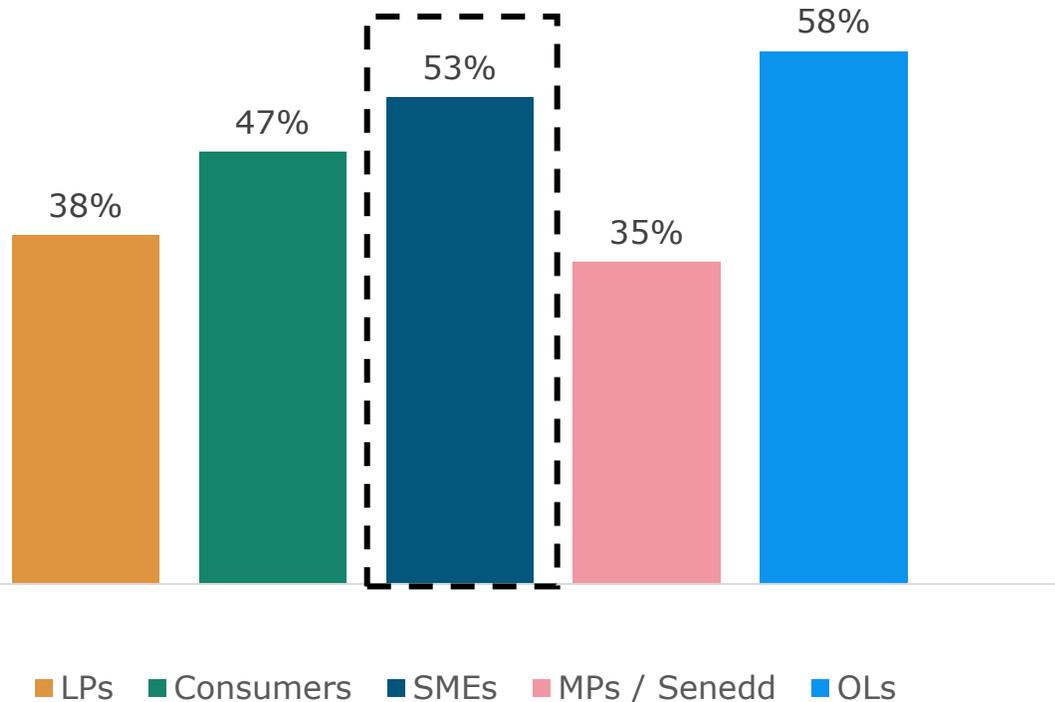
<b>1</b> <b>Clearly communicated at all stages</b>	<b>2</b> <b>Proportionate to the service they are paying for</b>	<b>3</b> <b>Supplemented if necessary</b>
Consumers expect costs to be clearly communicated by their legal services providers at all stages – they don't want any surprises.	Consumers expect legal service providers to justify the expense and want to know they are not being over-charged. Overall, they feel the system is currently opaque, and unclear on pay structures.	Consumers and Opinion Leaders feel the high cost of legal services prohibits those without the means to access justice in the first place. They therefore expect help and legal aid to be clearly signposted.

# Unprompted, stakeholders believe that price transparency would improve access to justice

Consumers	SMEs	Opinion Leaders
<p>Consumers have heard stories of how <b>lack of transparency</b> has impacted other consumers:</p> <p><i>"I heard that you have to be very careful when choosing a solicitor because they tend to over-charge and they will eke things out so as to make the most they can."</i></p>	<p>SMEs too have heard stories of <b>unfair prices</b>, and legal services providers who will over-charge:</p> <p><i>"When speaking to other business users [it's] clear everyone has the same opinion [using] legal professionals: they are very expensive and the phrase 'they know how to charge' is the main response given by all."</i></p>	<p>Opinion Leaders previously told us that <b>accessing legal services</b> rests on transparency:</p> <p><i>"I think people have to know that firstly that they're not being ripped off, they have to understand that what they're paying for is the service that they're getting."</i></p>
<p>They are clear that transparency would empower consumers as they would feel more confident engaging providers.</p>	<p>They believe that cost transparency would support their decision-making and allow them to get company sign off (checks and balances).</p>	<p>They believe the regulator should be involved in protecting consumers from being over-charged so as not to deter access to justice.</p>

# SMEs who are regular users of legal services are also likely to consider this an important area for the SRA

Factors for the SRA to play a role in to support confidence and trust:  
Transparent cost structure  
*% showing selected top 5*



SMEs feel leading on transparent cost structures should be the SRA's **second priority**, with Consumers ranking this third overall.

Perceptions of the importance of this factor for the SRA are consistent amongst SMEs, regardless of their views on whether they think legal services are good value for money, if they have experienced legal misconduct or levels of knowledge of the SRA. However, it is a higher priority for **regular users of legal services** (58%) compared to those who are not (43%).

Regular SME users spend a comparatively higher amount on legal services and require costs to be factored into annual budgets.



# Value for money for consumers



# Value for money for consumers

Value for money is less likely to be seen as an important priority for the SRA, as this is **trumped by transparent cost structures**. Transparency enables consumers to assess value for money and feel confident in their decisions.

**Consumers often feel that legal services are currently too expensive**, although those who've used legal services in the last year are more likely to feel legal services are priced right for the services they received. To a lesser extent, **SMEs agree that legal services should be more affordable but are less likely to feel that services are prohibitively expensive**. While cost may be front of mind for users of legal services, they recognise that **the price reflects the standards and expertise** of the profession.

Although **Legal Professionals** are clear that value for money has become an increasing priority for consumers, they feel dictating the price of legal services would be an over-reach of the SRA's role.

Instead, the SRA would have **more impact** in pushing for transparency and advocating for access to justice.

6th

**Driver of confidence and trust**

8th

**SRA role**

***"Every client wants to know how much everything is going to cost."***

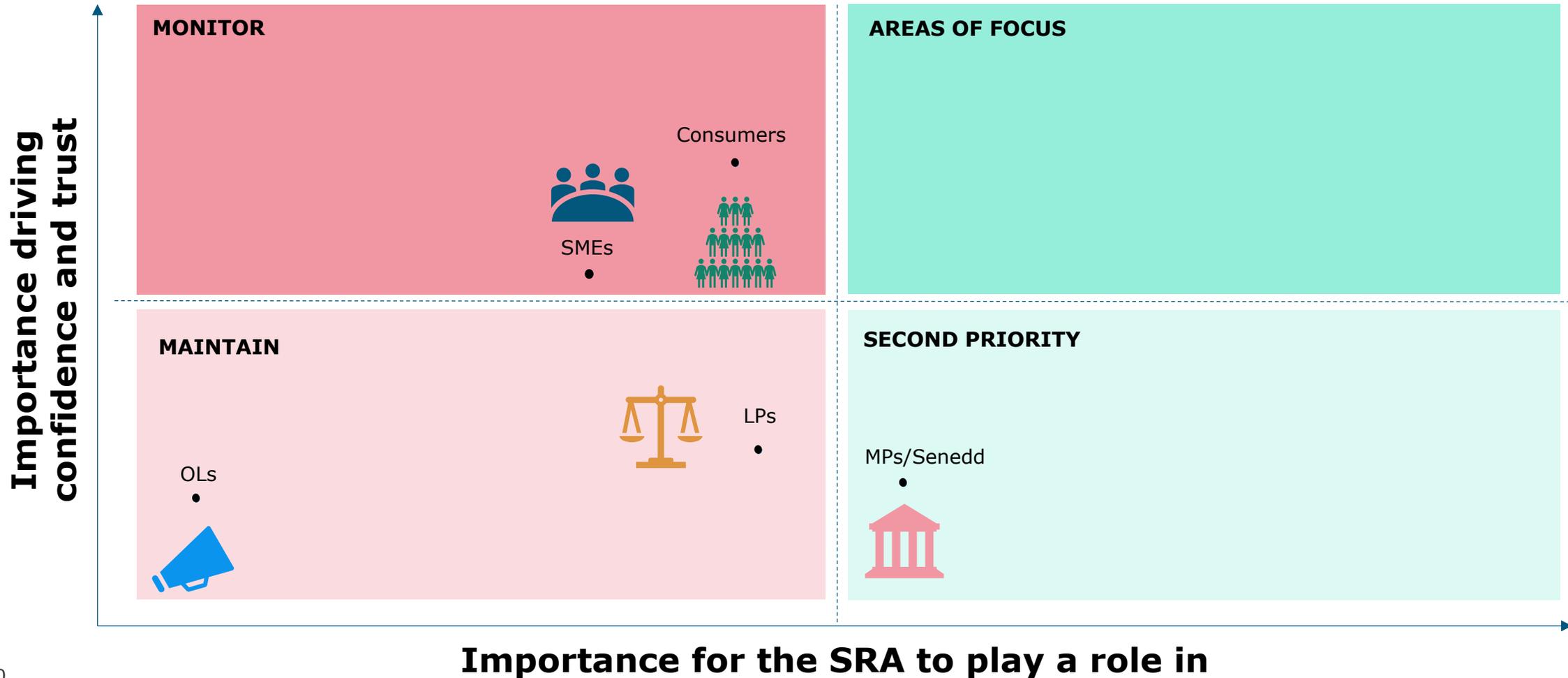
***- Solicitor***



# Value for money for consumers



Against a backdrop belief that legal services are too expensive for what you pay for, Consumers and SMEs expect the SRA to play a role in driving better value for money. LPs understand that value for money is top of mind for consumers but don't feel this is within the remit of the SRA. Opinion Leaders are less likely to see this as a key SRA priority.

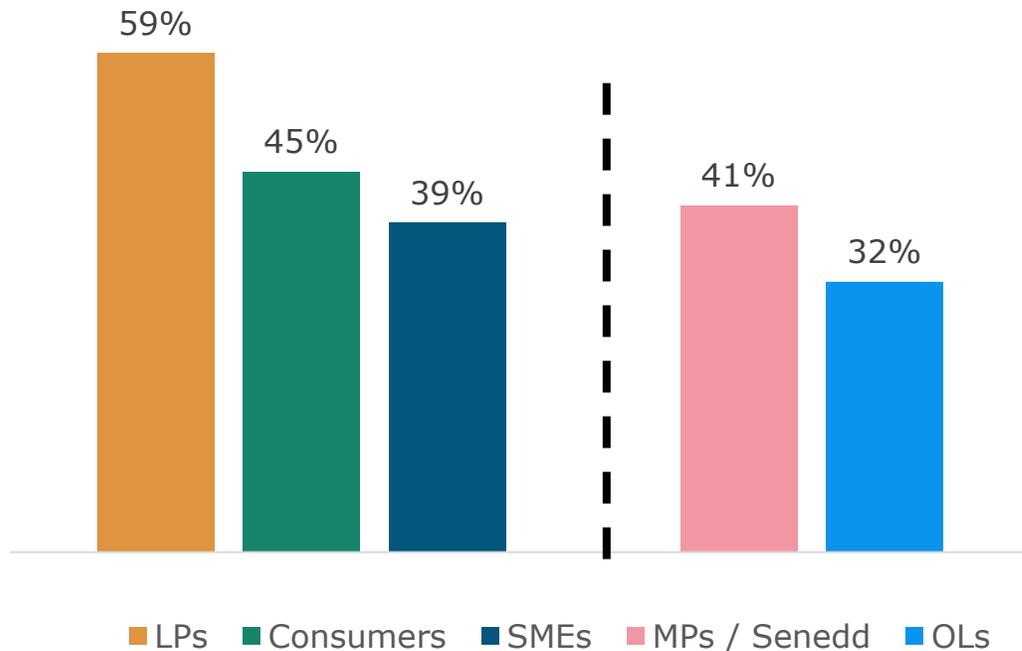




# LPs and Consumers are the stakeholders most likely to consider value for money drives confidence & trust

## Impact on confidence and trust: Value for money for consumers

% showing 'significant impact' (LPs, Consumers, SMEs),  
or selected top 5 (MPs, OLs)



Value for money is strongest as a driver of confidence and trust for Legal Professionals, who in the qualitative stage reported a **consumer concern** with the cost of legal services, which was linked to affordability and barriers to accessing services. SMEs and OLs are the least likely to prioritise value for money as a driver of confidence and trust.

Consumers (49%) and SMEs (42%) **who think legal services are too expensive** are more likely to think value for money is a significant key driver for confidence and trust.

Although not as high a priority, **Labour MPs and Senedd Members** are more likely to prioritise value for money (52%) in driving confidence and trust, compared to other political parties.



# Most think legal services are too expensive, but conversely users report good value for money

80% of Consumers and 81% of SMEs who have used legal services agreed these were good value for money. Nonetheless, perceptions of cost indicate a majority perceive services to be too expensive.

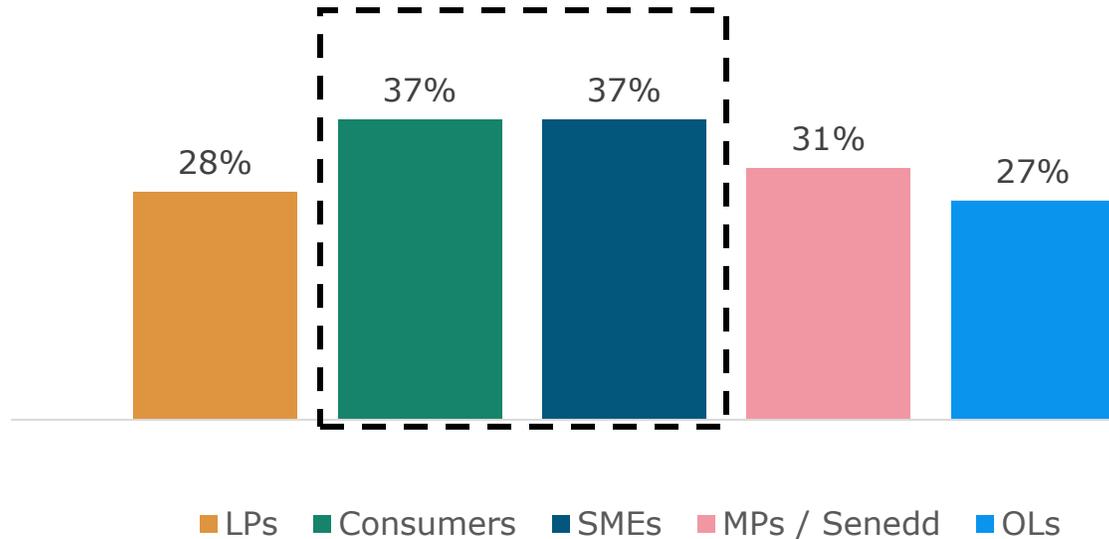
## Perceptions of legal service costs for both users and non-users





# Consumers and SMEs are more likely to expect the SRA to ensure value for money compared to other stakeholders

Factors for SRA to play a role in to support confidence and trust:  
**Value for money**  
*% showing selected top 5*



Consumers who have never used legal services (41%) and SMEs with **no recent experience** (56% 5 years +) are more likely to consider this area a priority for the SRA. This may reflect a general perception of price that needs managing rather than a firsthand experience.

**Furthermore, those who feel legal services are too expensive** (Consumers 43% and SMEs 38%) are more likely to expect the SRA to lead on improving value for money for consumers.

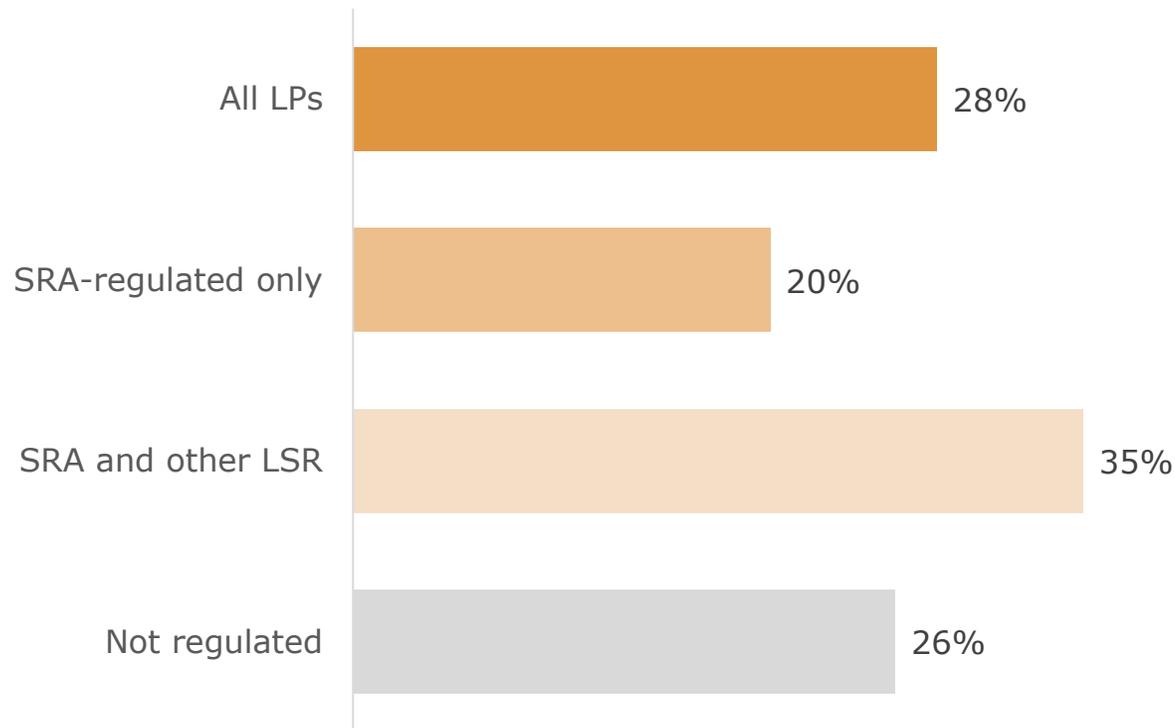
In the exploratory phase, Consumers indicated that they **understood the (high) price of legal services is directly linked to the extensive training** and standards required. Nonetheless, they expected a legal regulator would help to ensure legal service providers are **giving consumers the best possible value for money** and ensuring prices are fair and appropriate.



# In addition, less than a third of LPs believe driving value for money should be a priority for the SRA

## Factors for SRA to play a role in to support confidence and trust: Value for money

% showing selected top 5, based on type of regulation



Overall, Legal Professionals do not feel that driving value for money should be within the remit of SRA priorities (28% selected this as a top 5 priority). Value for money is **significantly lower for those regulated by the SRA** (only 20%).

Although Legal Professionals are clear that value for money has become an increasing priority for consumers, they felt the SRA should be prioritising transparency in cost structures:

*"The SRA should be focusing on providing consumers an explanation on costs, and why they are high."*

- Solicitor



# Clear and timely communications from legal professionals to clients



# Clarity and timeliness of communication from legal professionals to their clients

Clarity and timeliness of communications is a **driver** of confidence and trust, with high recognition of the importance of this factor amongst Legal Professionals who are likely to hear this **feedback firsthand from clients**.

Users of legal services indicate **high levels of satisfaction** with communications, but a perception of slow or insufficient communication is present when unpacking negative stories heard in the last three months, particularly those shared by legal users.

**However, it is less likely to be considered an important area for the SRA to support. Legal Professionals** are likely to see this factor as **their responsibility**, but helping consumers manage their expectations on response times may be valuable.

This factor is also directly linked to **perceptions of high standards**, as it is an indicator of quality for those engaging with legal professionals. Consumers may benefit from guidance around what to do if they feel the communication they receive falls below standards.

4th

**Driver of confidence and trust**

6th

**SRA role**

*"I don't think clients really know enough to say they're getting a good service. It can come down to whether or not you reply to their emails, not the actual work."*

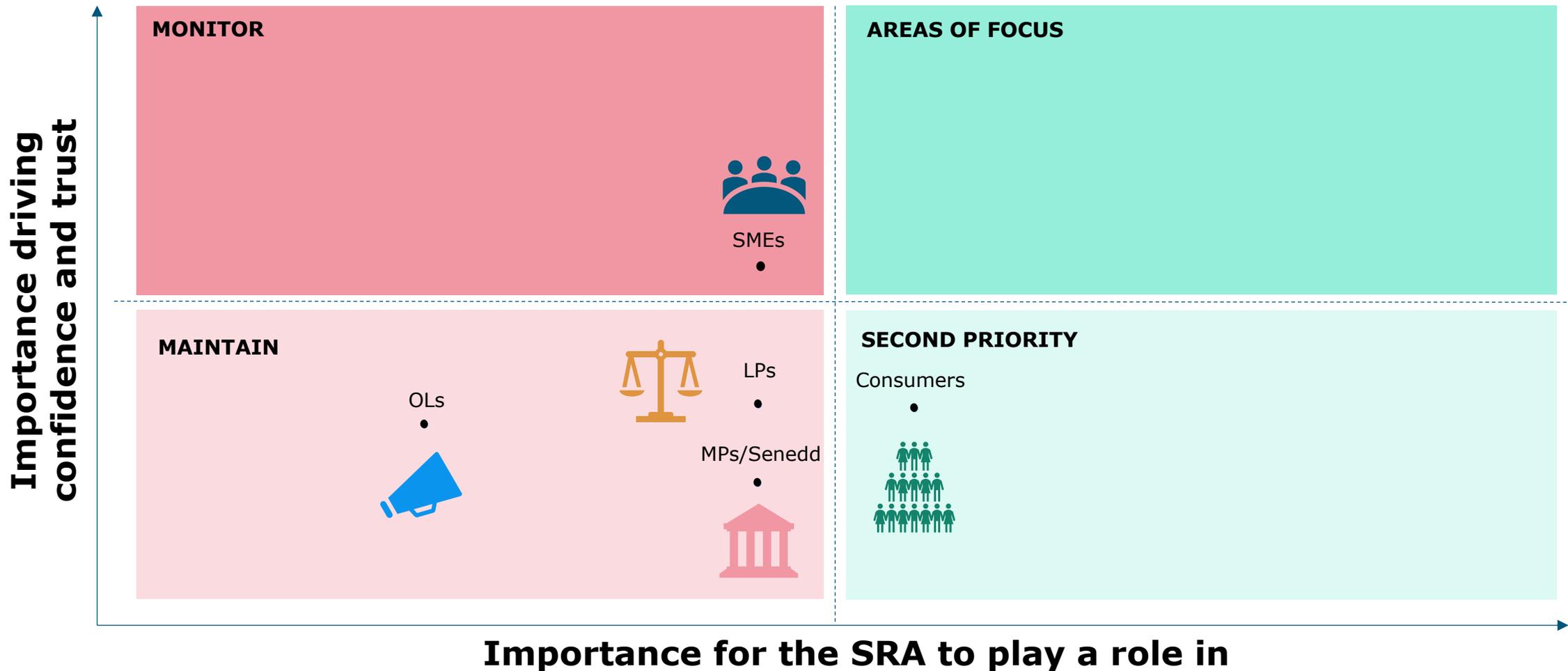
– Solicitor



# Clear and timely legal professional communications

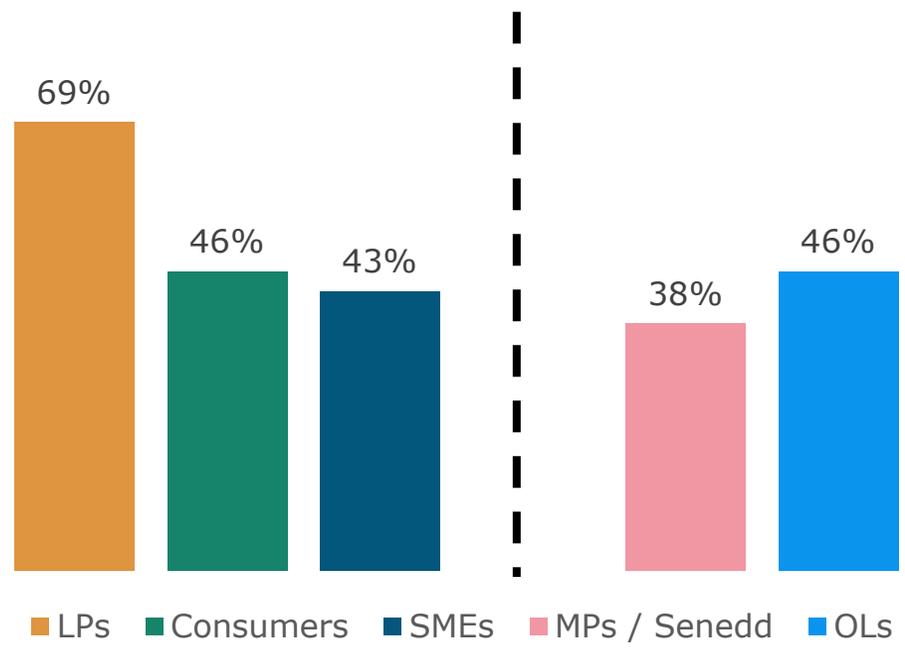


Clear and timely communications from legal professionals to clients is recognised as a factor driving confidence and trust, but it is generally seen as a less important area for the SRA to play a role in. However, Legal Professionals believe this falls within their responsibility rather than the SRA's.



# Legal Professionals consider clear and timely communications to be second strongest driver

**Impact on confidence and trust:  
Clear and timely LP communications**  
*% showing 'significant impact' (LPs, Consumers, SMEs),  
or selected top 5 (MPs, OLs)*



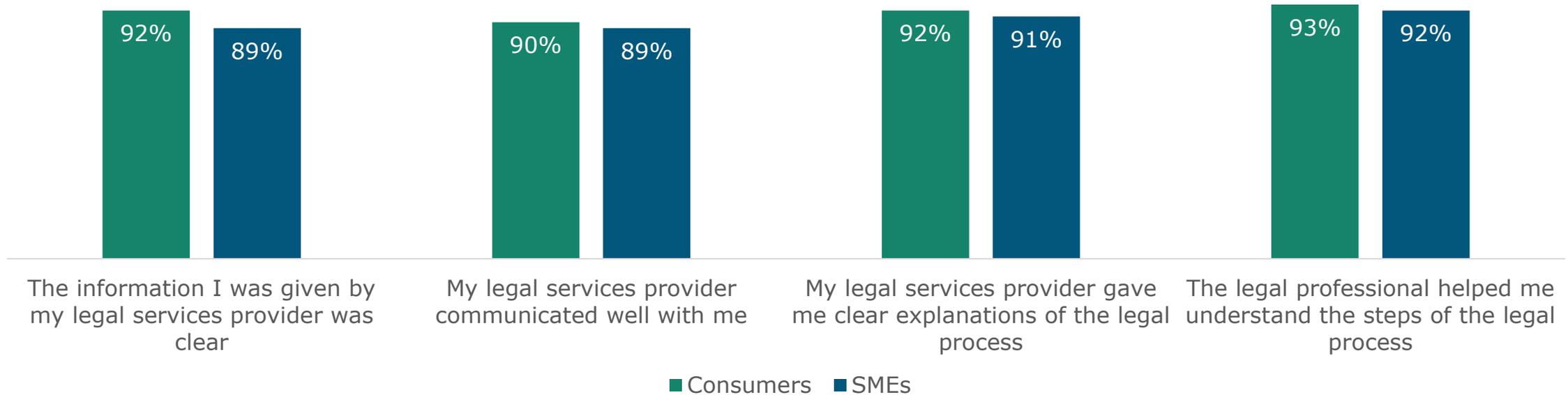
**Legal Professionals** are the audience most likely to believe that clear and timely communication from legal professionals to their clients impacts upon confidence and trust. Key **types of communication** cited during the exploratory phase included updates on their case, transparency about fees and processes, demystifying legal language and providing the information required for consumers to make empowered decisions.

Legal Professionals also felt that consumers sometimes use the speed with which they respond to communications as a **proxy for how effective or efficient they are**, which they feel isn't an accurate representation of the quality of their work.

**Consumer and SME** feedback supports this assumption; **responsiveness and availability** is indeed a driver of their confidence and trust in legal services they receive personally. For SMEs, clear and timely communication also helps to provide reassurance that a legal professional not only understands the relevant law, but how to apply it to their circumstances.

# Users of legal services indicate high levels of satisfaction with the communications they received

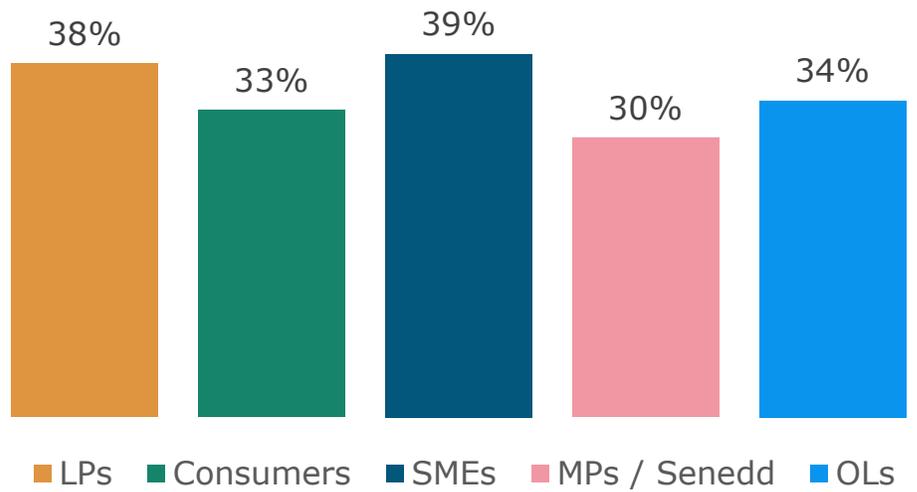
Experience of communication when using legal services  
*% 'somewhat' or 'strongly' agree, those who have used legal services*



Despite high levels of satisfaction with communications indicated by legal service users, **perceptions of slow communications** are present. Meanwhile, the importance Legal Professionals place on clear and timely communications as a driver for confidence and trust likely reflects their firsthand experience of this with their clients. This theme was also identified when exploring **negative stories** heard in the last three months, linked to slow processes and a lack of communication from legal service providers.

# However, this factor is less likely to be considered within the SRA's remit

Factors for SRA to play a role in to support confidence and trust:  
Clear and timely LP communications  
*% showing selected top 5*



**SMEs** are the audience most likely to believe the SRA could play an important role in clear and timely communication from legal professionals to their clients, although they ranked this sixth overall.

The exploratory phase found that **Legal Professionals** see their own activity, rather than that of the SRA, at the core of building confidence and trust. As clear and timely communications rests within their remit, it is perhaps unsurprising that they are less likely to consider this an important area for the SRA to play a role in overall.



# Easy to access information for consumers



# How easy it is for consumers to access clear information about legal services

The exploratory phase identified that easy access to information allows consumers to make **empowered decisions**. **Demystifying legal language** was considered an important way to engage consumers and ensure they had trust in the process.

**Consumers and SMEs** who have used legal services suggest they were able to access information with ease to inform decision-making (92% respectively).

**Legal Professionals** are unlikely to believe the SRA should play a role in this area to drive confidence and trust – perhaps as they consider this **their responsibility**. Nonetheless, the legal sector is complex and difficult for consumers to understand therefore **guidance in layman's terms** provided by regulators will support legal users in making informed decisions.

Stakeholders are most likely to consider **information on costs and the steps involved in the legal process** when discussing access to information. This was linked to cost transparency, as well as clear communication from legal professionals.

7th

**Driver of confidence and trust**

5th

**SRA role**

***"Is it an accessible market? [...] Do consumers have good choice and know how to exercise it? [...] What matters to the great majority of consumers is whether they understand how to access good quality, trusted advice."***

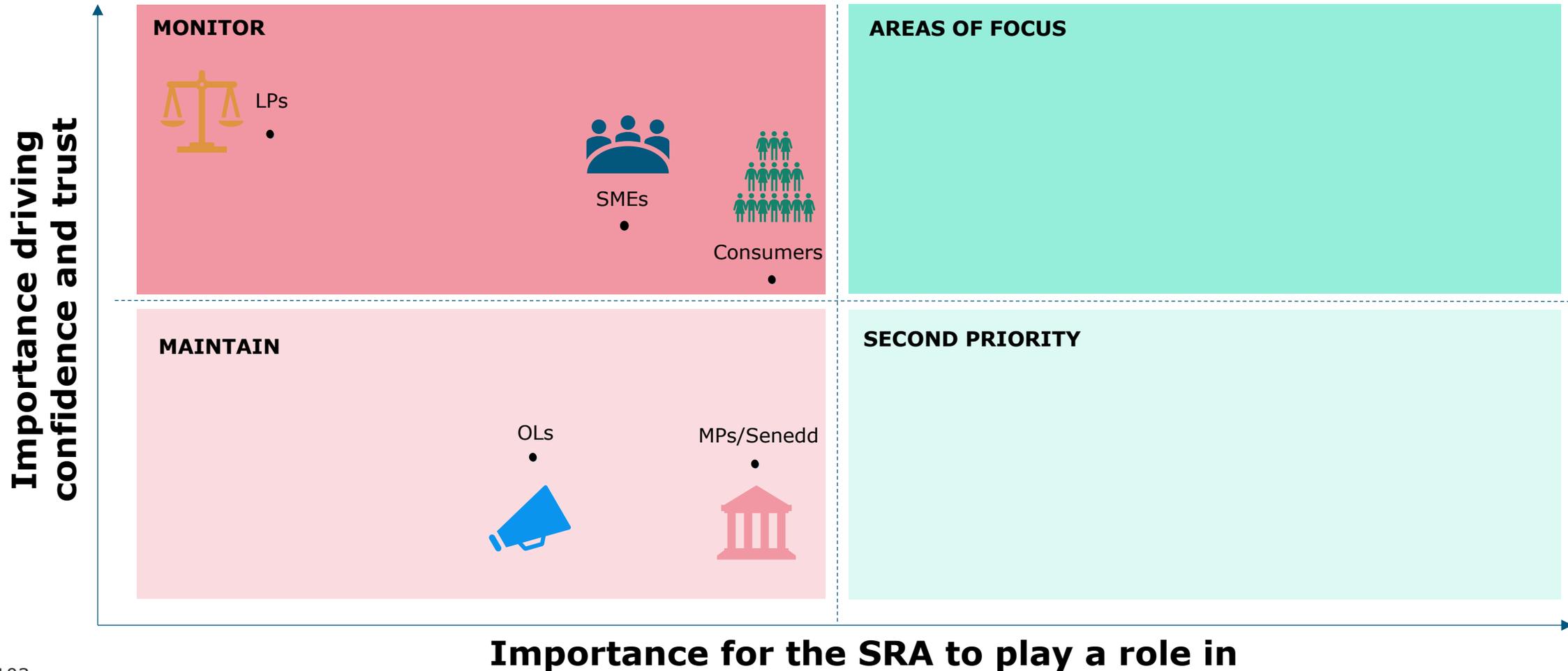
**- Opinion Leader**



# Easy to access information for consumers



Access to information is less likely to be considered an important driver of confidence and trust, with a stronger focus on timely and clear communication. While it is important that users of legal services can access information to inform their decisions, Legal Professionals believe this falls within their remit, rather than a role for the SRA.



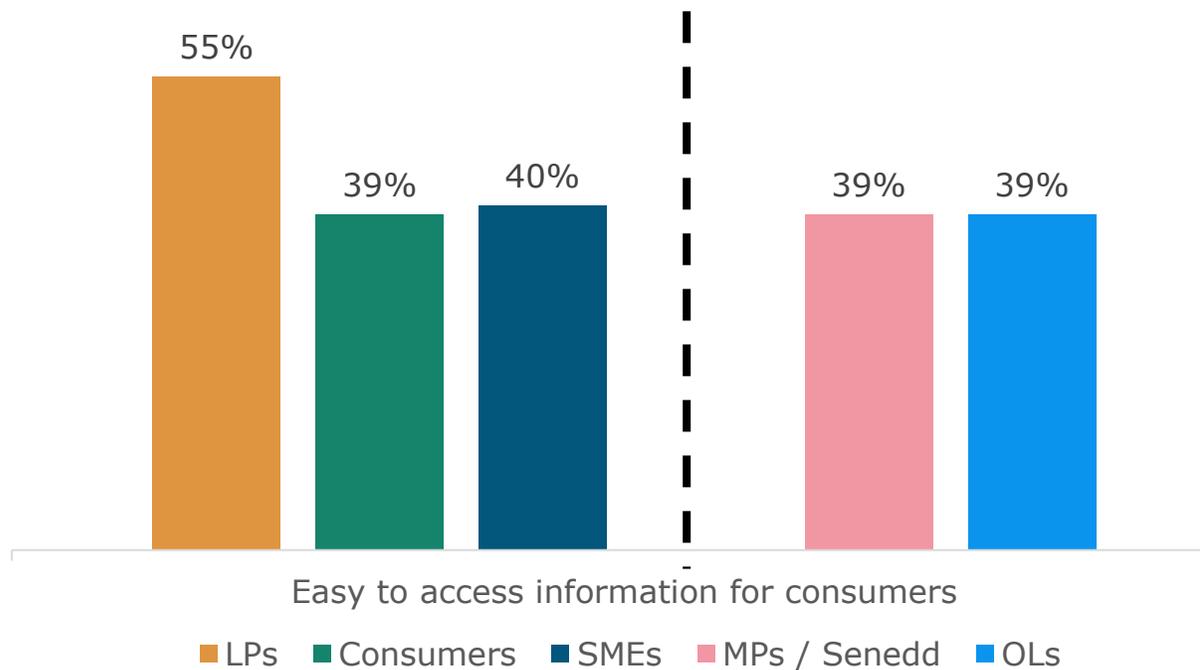


# Easy-to-access information is considered important in empowering users of legal services

## Impact on confidence and trust:

### Easy to access information for consumers

% showing 'significant impact' (LPs, Consumers, SMEs), or selected top 5 (MPs, OLS)



The exploratory phase identified that accessing information on the legal process and costs would allow consumers to make **empowered decisions**. Demystifying legal language was considered an important way to engage consumers and ensure they had trust in the process.

However, ease of accessing information was less likely to be considered a key driver of confidence and trust across stakeholders. **Timeliness and clarity of information** from professionals to their clients is more likely to be prioritised, although these themes are closely linked.

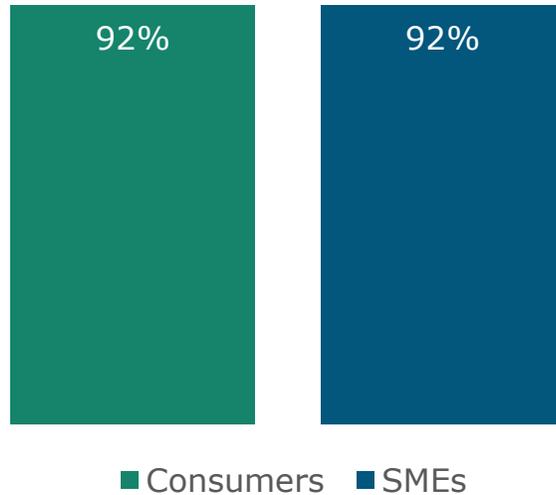
Consumers rated this factor eighth overall, with other stakeholders rating this factor sixth or seventh.



# Users of legal services find it easy to find the right information to inform their decision-making

I was able to find the information I wanted in order to make a decision that I was happy with

% 'somewhat' or 'strongly' agree



*"Confidence in what they tell you and the language used, if they tell you step by step and sometimes in terms I would understand rather than jargon."*

- Consumer

*"They provide the right information [and] are very informative, they will tell you everything and explain everything step by step."*

- Consumer

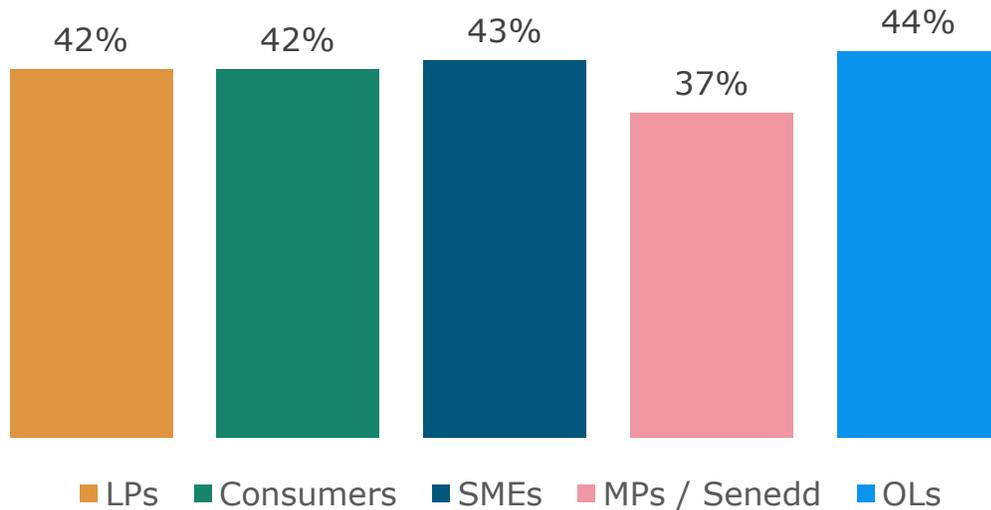
Nine in ten users of legal services are satisfied with their ability to access information to inform their decision-making.

Ease of accessing information was linked to transparency, honesty and simple and jargon-free language in open responses.



# Easy-to-access information is an indicator of high standards and is linked to transparency

**Factors for SRA to play a role in to support confidence and trust:**  
**Easy to access information for consumers**  
*% showing selected top 5*



**Legal Professionals** are unlikely to consider this an area for the SRA to be involved in to drive confidence and trust, rating it ninth overall. It is likely they consider this a **core responsibility for themselves**, to ensure they are providing their clients with the information they need.

Other stakeholders rank this factor fourth or fifth for the SRA, reflecting an expectation that the SRA could play a role, for example in demystifying the legal process or providing consumer-facing information in layman’s terms.

Open responses related to accessing information largely focus on **costs** as well as **steps in the legal process**. This area is generally seen as an indicator of high standards for those engaging with legal professionals.

*“Implementing measures to increase transparency around legal fees, processes, and outcomes, ensuring clients have a clear understanding of what to expect.”*

*- Consumer*



# Awareness certain LP services are regulated



# Awareness that certain LPs are regulated and awareness of the SRA's regulatory role

Building awareness that certain legal service providers are regulated is not considered a key driver of confidence and trust. In fact, there are already high levels of confidence and trust in legal services, despite **low levels of awareness** of the SRA and other legal regulators.

There is an **underlying assumption** amongst Consumers and SMEs that legal service providers are regulated, which naturally increases confidence and trust in the profession.

Regulation is therefore a **hygiene factor** and increasing awareness that only *some* providers are regulated may result in disappointment and perhaps even damage confidence and trust.

It is important this hygiene factor is **maintained**, although it is not a priority to further drive awareness of the SRA's regulatory role. Nonetheless, **knowledge building** of activity linked to key drivers of confidence and trust – including high standards, training and regulation against malpractice – will likely be strategically important.

8th

**Driver of confidence and trust**

9th

**SRA role**

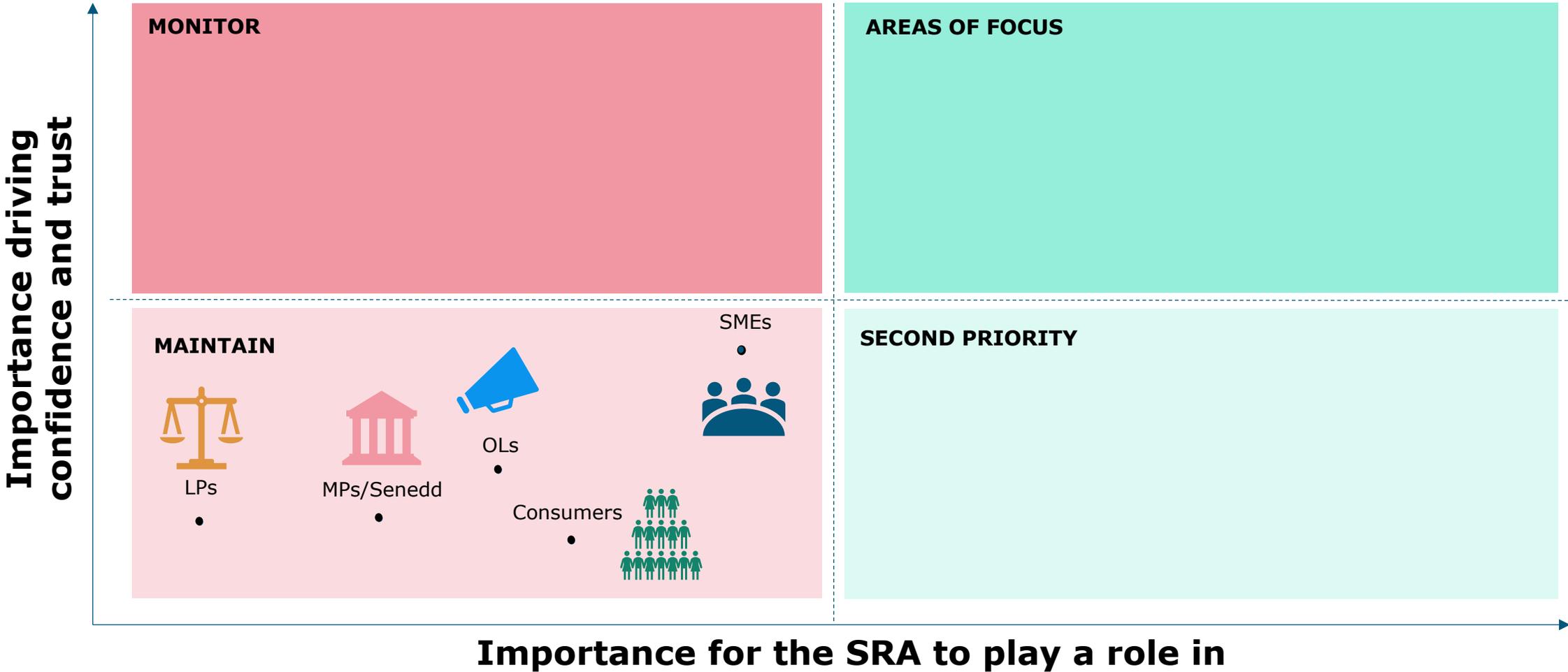
***"I thought [legal services] had to be regulated by law? Feels like they should be."***

**– Consumer**

# Awareness certain legal service providers are regulated



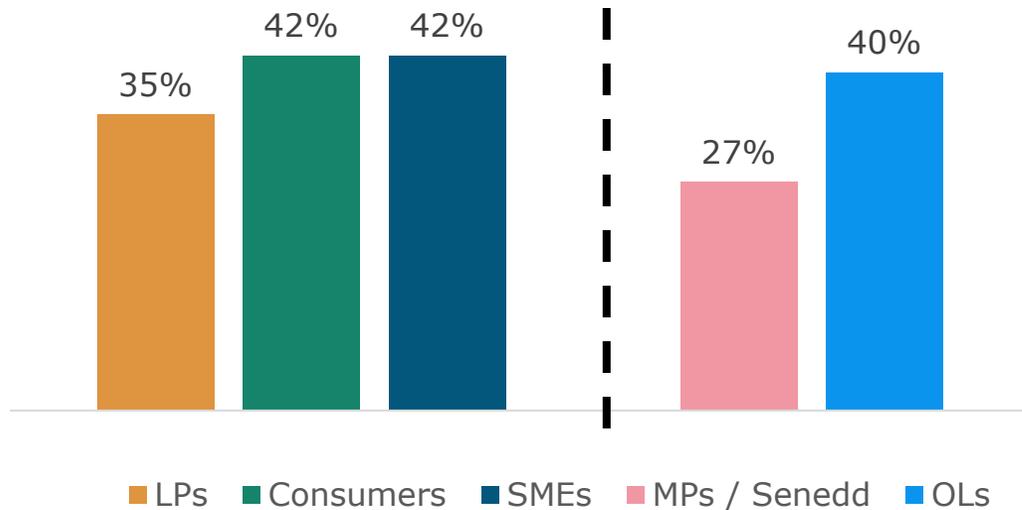
An underlying assumption (not knowledge) that legal services are regulated, combined with low overall awareness and understanding of what regulation in the legal sector and the SRA's role is in practice, means increasing awareness of regulation is not seen as a strong driver of confidence and trust or an area where the SRA should particularly focus on.



# Regulation is a hygiene factor that is assumed as opposed to being viewed as a key driver

## Impact on confidence and trust: Awareness certain Legal Providers are regulated

% showing 'significant impact' (LPs, Consumers, SMEs), or selected top 5 (MPs, OLS)



The general assumption that legal service providers are regulated by default means that awareness of regulation is one of the least strong drivers for confidence and trust across audiences.

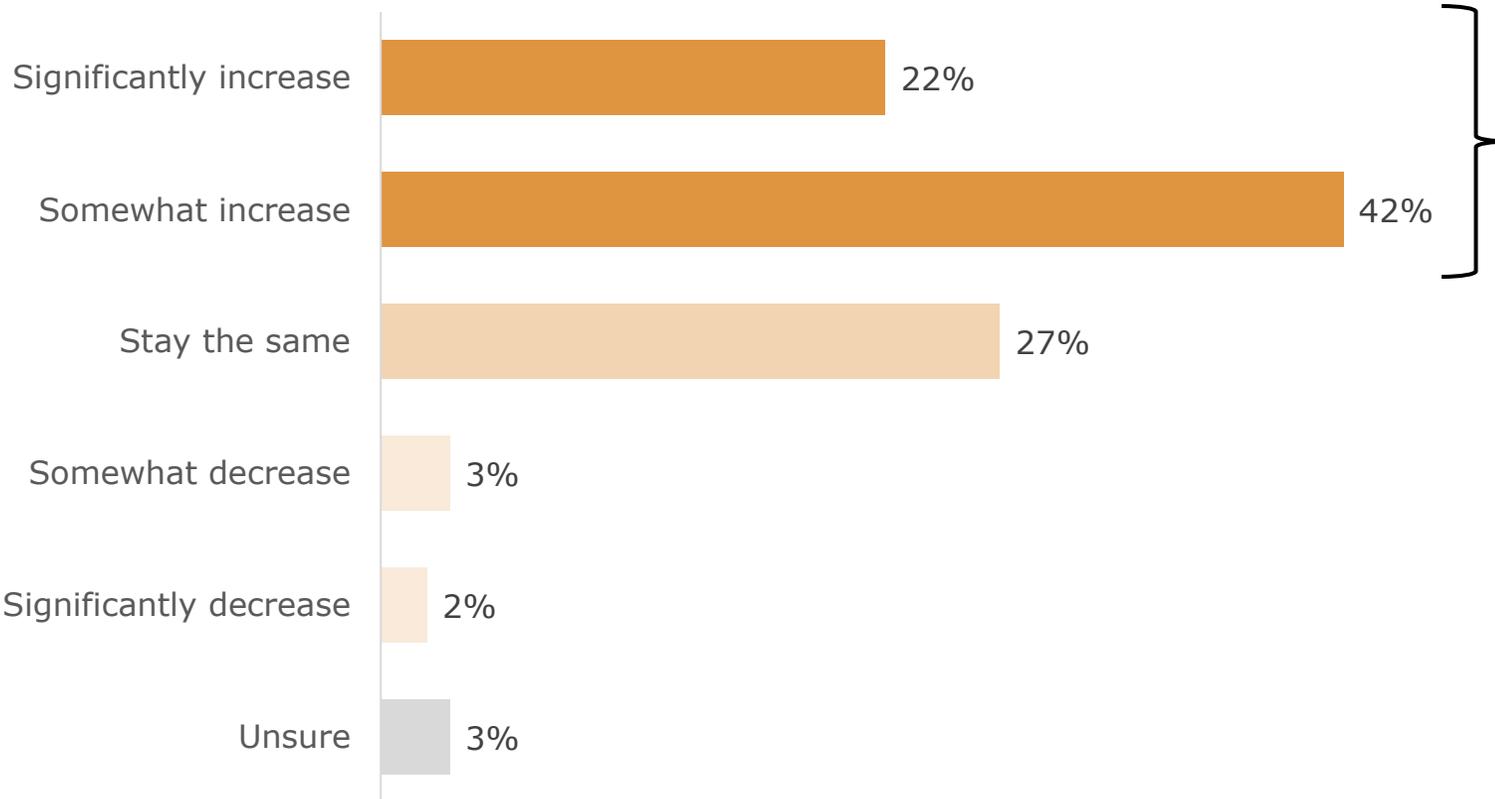
**Consumers and SMEs** had previously told us they expect legal services to be regulated:

*"I would think that being legal, of course they're regulated services."*  
- SME (user of LS)

*"I thought [legal services] had to be regulated by law? Feels like they should be."*  
- Consumer (non-user of LS)

# While 64% of LPs feel greater awareness of the SRA would increase consumer confidence and trust, our findings suggest otherwise...

### Would confidence and trust increase if consumers had greater awareness of the SRA?



Overall, Legal Professionals believe increased awareness of the SRA would lead to greater confidence and trust in legal services (NET increase 64%) for consumers.

Agreement is however **significantly lower for those regulated by the SRA** only (57%).



# Positive coverage of legal sector in the media and wider public debate



# Positive coverage of the legal sector in the media and wider public debate

While considered a low driver overall, this factor is more important to Legal Professionals who are more **sensitive to stories** and wider public debate, and who recognise benefits of coverage to **boost awareness** as well as **education and access**.

Legal Professionals feel there is currently a **negative narrative** of the profession in the media, heightened by coverage of professionals being **sanctioned by regulators**, which is thought to erode confidence and trust. LPs want the SRA to help champion the profession and counter misinformation.

Only a **minority** of Consumers and SMEs report hearing negative stories, generally related to cost and customer service. Key stories are gained via word of mouth by **friends or family** who have used legal services – a narrative which the SRA cannot control.

Consumers rely on word of mouth and firsthand reviews to inform their perceptions; media stories appear to have had less cut through. While the SRA **may not need to actively enhance media coverage** through campaigns, a focus on themes linked to high standards and transparent costs which were present in stories shared by word of mouth cements the importance of these drivers.

9th

**Driver of confidence and trust**

7th

**SRA role**

***"Highlight and bring attention to the positive work that the legal sector does as opposed to just being present in the media when something bad happens to a specific firm or solicitor."***

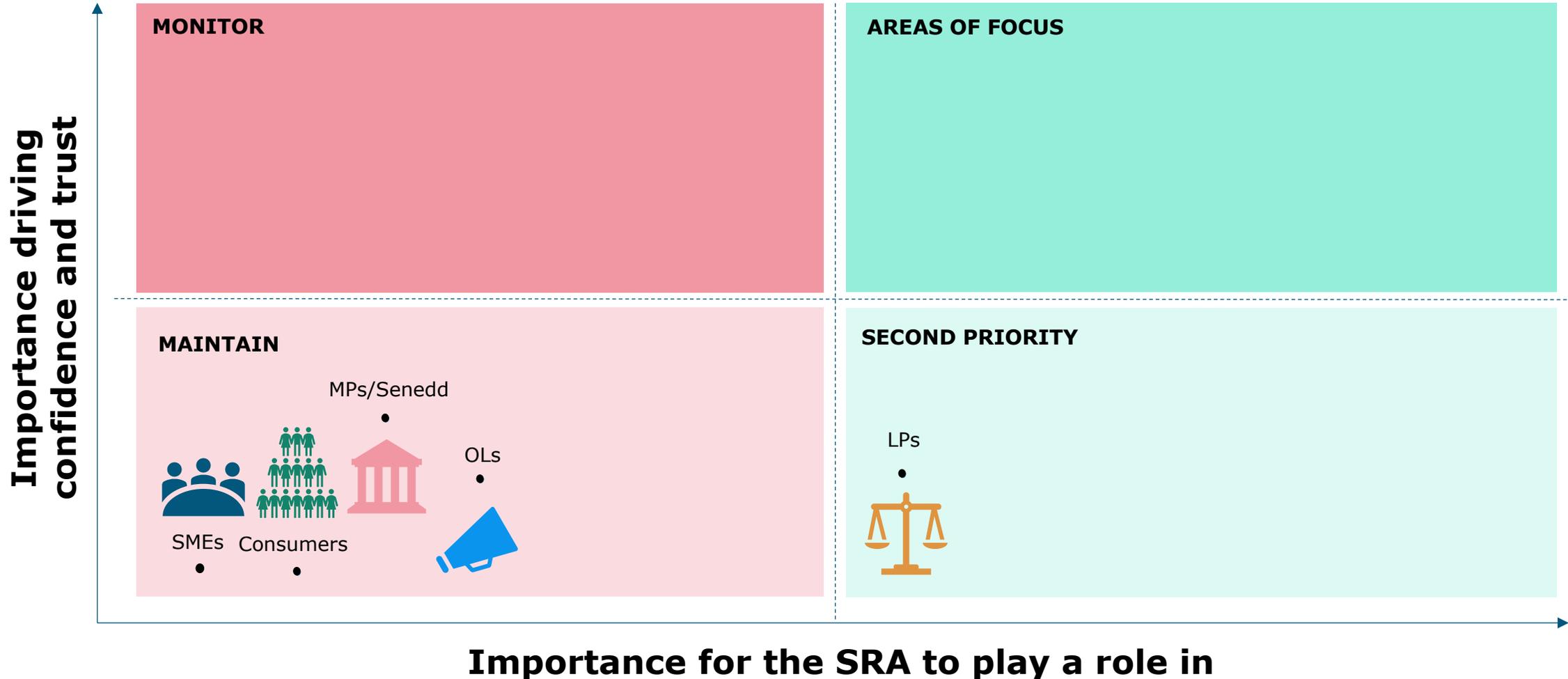
**– Solicitor**



# Positive coverage of the legal sector widely



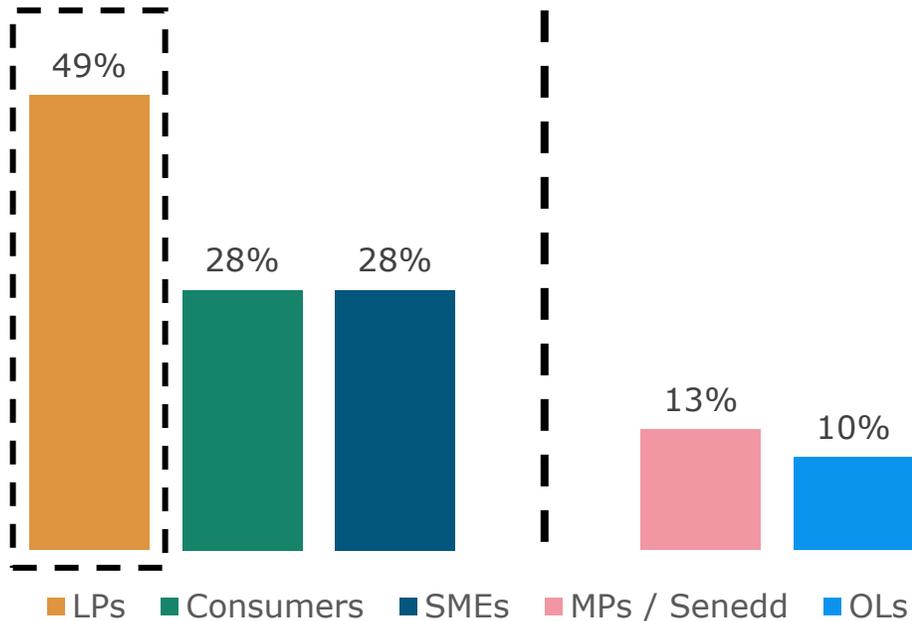
While most stakeholders do not consider positive coverage an important area for the SRA to support, it is most important for Legal Professionals who are sensitive to negative sentiment and believe the SRA has the reach and capabilities to inform public debate. Benefits to this include better awareness and understanding of the profession. Negative stories heard by Consumers and SMEs (mainly through word of mouth rather than the media) are linked to expensive services as well as cost transparency.



# Legal Professionals are most sensitive to wider public debate and sentiment about the legal profession

## Impact on confidence and trust: Positive coverage of legal sector

% showing 'significant impact' (LPs, Consumers, SMEs),  
or selected top 5 (MPs, OLS)



**Legal Professionals** are the audience most likely to believe that positive coverage in the media and public debate impacts upon confidence and trust in legal services.

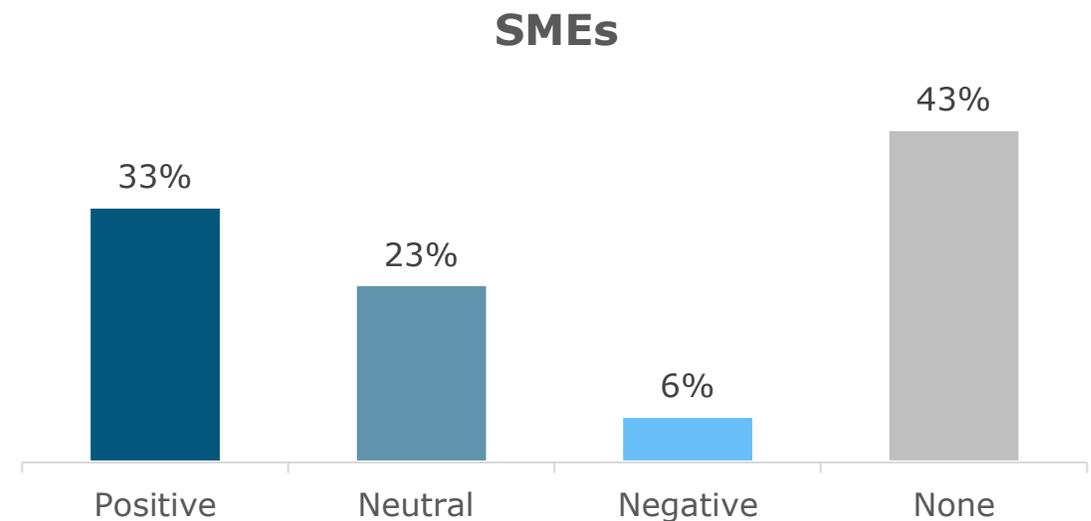
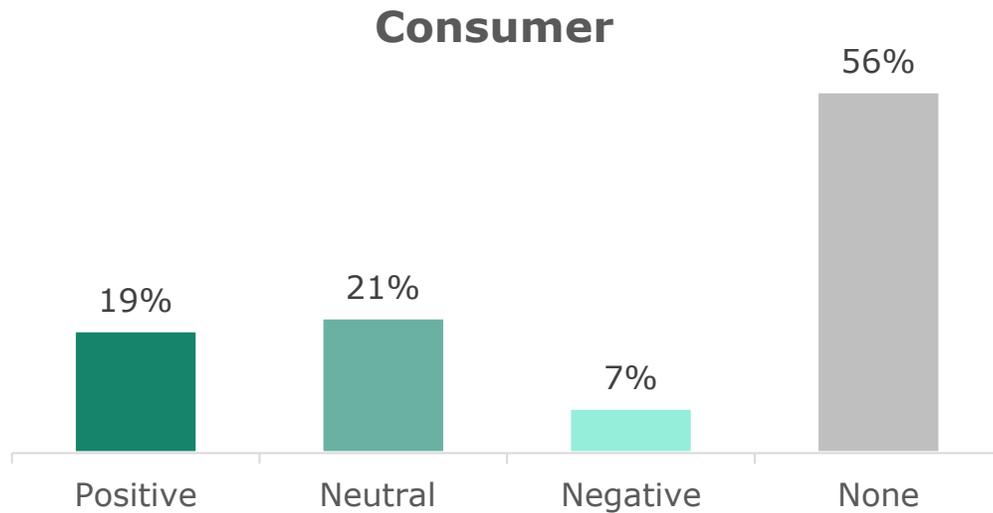
They are particularly **sensitive to stories**, and unsurprisingly hyper aware of any which gain traction in the media. They felt this was heightened by what they considered to be **high coverage of professionals being sanctioned by regulators**, which was thought to erode confidence and trust through perceptions of poor practices and low-quality standards across the profession.

49% of Legal Professionals consider positive coverage highly impactful, significantly more than Consumers and SMEs.

**86% of Legal Professionals who believe that confidence and trust would increase if consumers had greater awareness of the SRA consider positive coverage highly impactful.** This may suggest there is a perception that increased presence of the SRA will boost positive perceptions, or perhaps that the SRA has the power to impact misinformation.

# Most of the stories heard about the legal profession in the last 3 months are positive or neutral

### Recall of news or stories about the legal profession in the last 3 months



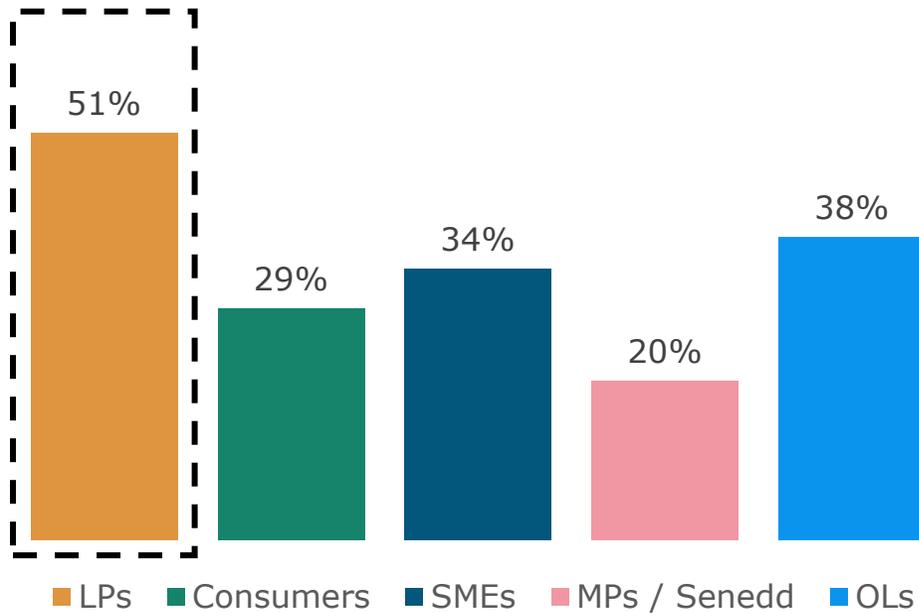
Consumers who have **used legal services** in the last 12 months are more likely to have heard positive stories about the legal sector (27%) than those who have never used legal services (17%). Those who consider legal services **expensive** are less likely to have heard positive stories (12%) than those who consider services inexpensive (43%).

SMEs who have **used legal services** are more likely to recall positive stories (40%) than those who have never used legal services (16%).

53% of those with **high awareness of the SRA** have heard positive stories, compared to 17% with low awareness.

# Legal Professionals appear to link positive coverage to increased awareness, access and education

Factors for SRA to play a role in to support confidence and trust:  
Positive coverage of legal sector  
*% showing selected top 5*



**Legal Professionals** are the audience most likely to consider positive coverage of the legal sector more widely to fall within the SRA’s remit.

In open questioning, when exploring any other factors the SRA could do to support confidence and trust, 9% of LPs suggested **raising awareness**. This largely focused on the legal sector but in some instances included the SRA too. Increased marketing campaigns and media coverage were mentioned in comments. A further 6% suggested **dealing with negative media or misinformation**.

Awareness was linked to helping **demystify** the legal process for consumers, encouraging uptake of services through an **understanding of the benefits**, making legal services feel more **accessible** and boosting the **positive reputation** of the profession through media stories.



# The future

# Future focus

**Maintaining high ethical standards** is seen as the priority area of future focus for Legal Professionals, Opinion Leaders and MP and Senedd Members. This prioritisation aligns with the key driver of confidence and trust.

Legal Professionals recognise the need to embrace and stay up to date with **technological advancements and AI** specifically, through CPD. Interestingly, stakeholders are more likely to be concerned about the risks technology and AI pose for consumers, than using it to improve consumer experience. Guidance in this area will likely be desired.

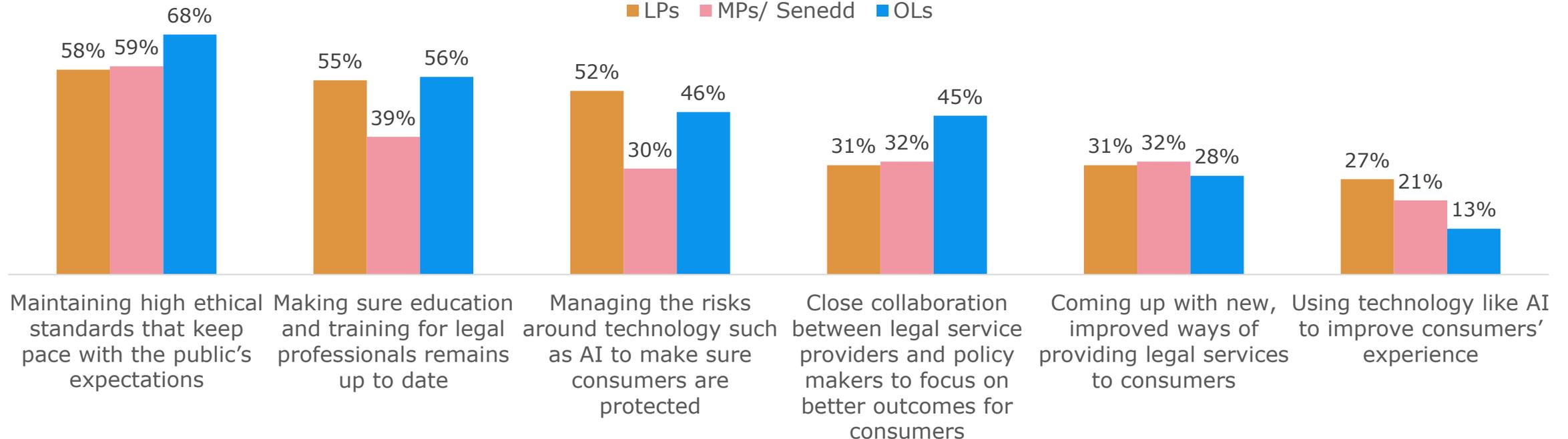
Consumers and SMEs recognise the positive potential of legal providers' use of technology. They generally feel **more confident** in services which make use of technological advancements reflecting the need for providers to keep pace with changes to maintain confidence and trust.

# Maintaining high ethical standards is seen as the priority area for future focus

## Prompted areas of focus to prepare for the future and maintain confidence and trust in legal services

% showing selected top 3

■ LPs ■ MPs/ Senedd ■ OLs



Stakeholders are more likely to be concerned about the risks technology and AI pose for consumers, than using it to improve consumer experience.

# AI and technological changes were top of mind for future changes and challenges for Legal Professionals

29%

## Technological advancements

While some share concerns around potential misuse of AI, others suggest a need to embrace technology and AI and train legal professionals on how to use it to enhance services.

*"Embrace and integrate advanced legal technologies such as AI, blockchain, and machine learning to improve efficiency, accuracy, and accessibility of legal services."*

21%

## DEI and access to justice

Responses included a focus on Diversity, Equality and Inclusion of legal professionals to attract diverse talent (10%), or more affordable services or fee / process structures to ensure access to justice (11%).

*"Continuing to open up the profession to people from all walks of life but maintaining high educational and vocational training."*

15%

## Training and qualifications

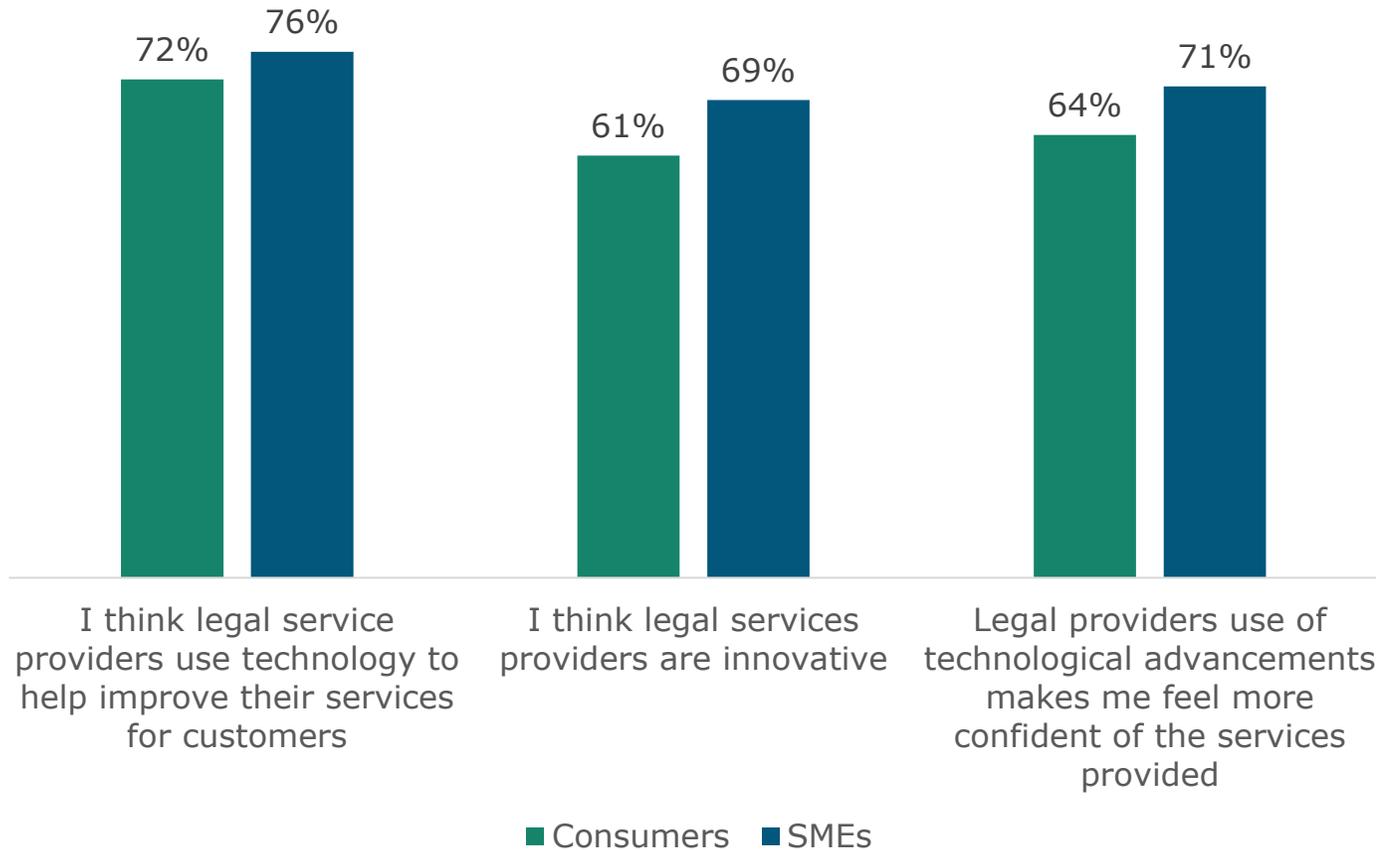
There was recognition that legal professionals need to keep up to date with legislation changes, as well as soft and technical skill development.

*"Make public aware of how accessible lawyers can be if clients/members of the public just need a little free advice."*

# Users of legal services are likely to recognise the positive potential of legal providers' use of technology

## Perceptions of technology

Showing % 'somewhat' and 'strongly' agree



Perceptions of the legal profession and technology are generally positive, more so amongst SMEs than Consumers.

Those who have used legal services in the **last 12 months** are more likely to agree with statements, compared to those who have never used legal services.

Across the three statements, highest levels of **disagreement** relates to legal services being innovative. Positively, only 21% of Consumers and 19% of SMEs feel legal services providers are not innovative.



# Conclusions

# Implications for the SRA: four priority areas

**Following analysis of the data collected in this research, we identified four factors as the most impactful, and that hold the most potential for the SRA to focus on for the future to drive confidence and trust:**

## High standards in legal professional services

Strongly linked to other factors – often seen as an outcome of training and regulatory action, while easy access to information and clear communication indicate high standards to users of legal services. Perceptions and satisfaction linked to this area are often shared by consumers through word of mouth.

## Legal professionals who have undertaken high quality training and qualifications

This area is considered important to drive high standards, and firmly within the SRA's remit. This area will be key to ensuring long-term maintenance of confidence and trust, as there is an expectation from all audience groups that the sector must stay abreast of future changes, such as technological advances.

## Regulatory action in the face of malpractice from legal professionals

Key to protecting consumers and core to protecting high standards in the profession in the view of audiences. Consumers and SMEs say that they are reassured by having this safeguard in place, although more awareness of this work may be needed.

## Transparent cost structures for consumers

Linked to access to justice and empowerment of consumers. Transparency is needed to judge whether the price of the legal services chosen is fair, proportionate and in turn, good value for money. Transparency ensures consumers feel they can effectively access legal services and instils confidence and trust.

# Implications for the SRA: areas of impact

**All stakeholder audiences believe it is the SRA's role to drive confidence and trust in legal services and this research has found clear areas in which the SRA can have most impact.**

High standards in legal professional services

Communicating how high standards within legal services are **achieved and maintained** will help to drive client and public confidence and trust in legal services overall. Focusing on areas interlinked with high standards will boost perceptions further.

Legal professionals who have undertaken high quality training and qualifications

There is an understanding that high standards are a product of extensive training and rigorous qualifications, and the quality of this must be upheld. Training to ensure legal professionals can **stay apace of future changes and innovations** is key.

Regulatory action in the face of malpractice from legal professionals

High proportions of users don't know what to do if they experience misconduct and what avenues there are to redress. More **awareness of what does in fact constitute malpractice** and how the SRA could support them, as well as their role in addressing malpractice more broadly could drive confidence and trust further.

Transparent cost structures for consumers

Stakeholders care about **access to justice** and see a lack of cost transparency as a barrier to this. Therefore, focused activity in this area will help to engage audiences. Providing insight into legal processes to help providers justify costs and manage expectations will support professionals and ensure consumers feel they are getting **value for money**.

# Implications for the SRA: stakeholder considerations

**While stakeholder groups are largely aligned on the factors which drive confidence and trust in legal services and the priorities for the SRA, there are some considerations for each audience:**

Legal Professionals	Consumers	SMEs	MPs and Senedd Members	Opinion Leaders
<p>This audience are sensitive to negative narratives and misinformation and want to feel that their profession is being championed. Their dissatisfaction with regulatory actions can create barriers to engagement, but many say that they would be open to further support (e.g. ethical guidance, CPD) from the SRA to help uphold high standards.</p>	<p>Cost is front of mind for this audience. There is a strong sense that services are very expensive, but acknowledgements that the expertise and standards come at a premium. The existence of legal regulators instils confidence and trust in these audiences, although over half aren't aware of the SRA (or any other legal regulators), so this is based on their assumptions, not knowledge.</p>	<p>Compared to Consumers, SMEs are more likely to feel that they have the knowledge and tools to confidently access legal services. They are less likely to feel that legal services are prohibitively expensive. Transparency of cost structures, as opposed to value for money, is more important for this group, who may have had experiences of legal services not feeling commensurate with the fee charged.</p>	<p>There are high levels of uncertainty or neutral sentiment among this group. This may reflect low knowledge, or impartiality. The new Parliament and Senedd, with lots of new MPs and MSS, could present an opportunity for the SRA to engage parliamentarians further to narrow the awareness gap between SRA and other (non-legal) regulators. Taking action in the face of misconduct to protect consumers is a key priority.</p>	<p>Consumer protection is a key priority for this audience, and this is the lens through which factors are considered. Linked to consumer protection, they recognise the importance of cost transparency to empower consumers and support access to justice.</p>



**Nine in ten**

feel more confident using a provider that is regulated, when prompted to think about the difference between regulated and unregulated legal services providers. This echoes the assumption that all providers are regulated (as found by this research) and indicates this is a hygiene factor: the mere existence of a regulator drives confidence and trust as a safeguard is in place to protect consumers.



# Appendix

---

1. Additional insights
2. Sample details



# 1. Additional insights

# Quantitatively, stakeholders find all nine drivers to be impactful on confidence and trust

**Factors that have any impact on confidence and trust in legal services**  
 % showing NET 'has any impact' (LPs, Consumers, SMEs) or selected in top five (MPs and OLS)

	LPs	Consumers	SMEs	MPs/Senedd	OLS
High standards	97%	97%	97%	61%	51%
Transparent cost structures	96%	96%	95%	47%	63%
LPs' training and qualifications	97%	97%	96%	45%	59%
Clarity and timeliness of client comms	98%	96%	95%	38%	46%
Action against malpractice	93%	93%	95%	44%	59%
Value for money for clients	97%	96%	96%	41%	32%
Easy access to information for consumers	95%	96%	95%	39%	39%
Awareness that certain LPs are regulated	92%	97%	96%	27%	40%
Positive media coverage	94%	95%	93%	13%	10%

Based on our experience, these stakeholders are more likely to be impartial, particularly if they have lower knowledge of the subject area. Lower proportions also reflect question format differences, e.g. top five selection rather than rate all.

# Unprompted questioning in the survey did not identify any new drivers of confidence and trust

Factors which drive confidence and trust (open responses, top 5 & mentions of regulation specifically)

For those who don't use legal services

**Legal Professionals**

- Honesty (21%)
- Transparency (20%)
- Integrity (14%)
- Regulation (10%)
- Customer service / working in the customer interest (9%)

**Consumers**

- Honesty (15%)
- Recommendations or reviews (15%)
- Positive experience / outcomes (11%)
- Communication / information (10%)
- Reputation (10%)
- Accountability / regulation (NET 9%)

**SMEs**

- Quality of service (NET 17%)
- Integrity and honesty (15%)
- Expertise and training (14%)
- Clear communication (14%)
- Reputation (13%)
- Accountability / regulation (NET 6%)

**Legal Professionals**

- Affordability (26%)
- Honesty (9%)
- Accessibility (8%)
- Reputation (8%)
- Clarity (8%)
- Communication / provision of information (8%)
- Regulation (4%)

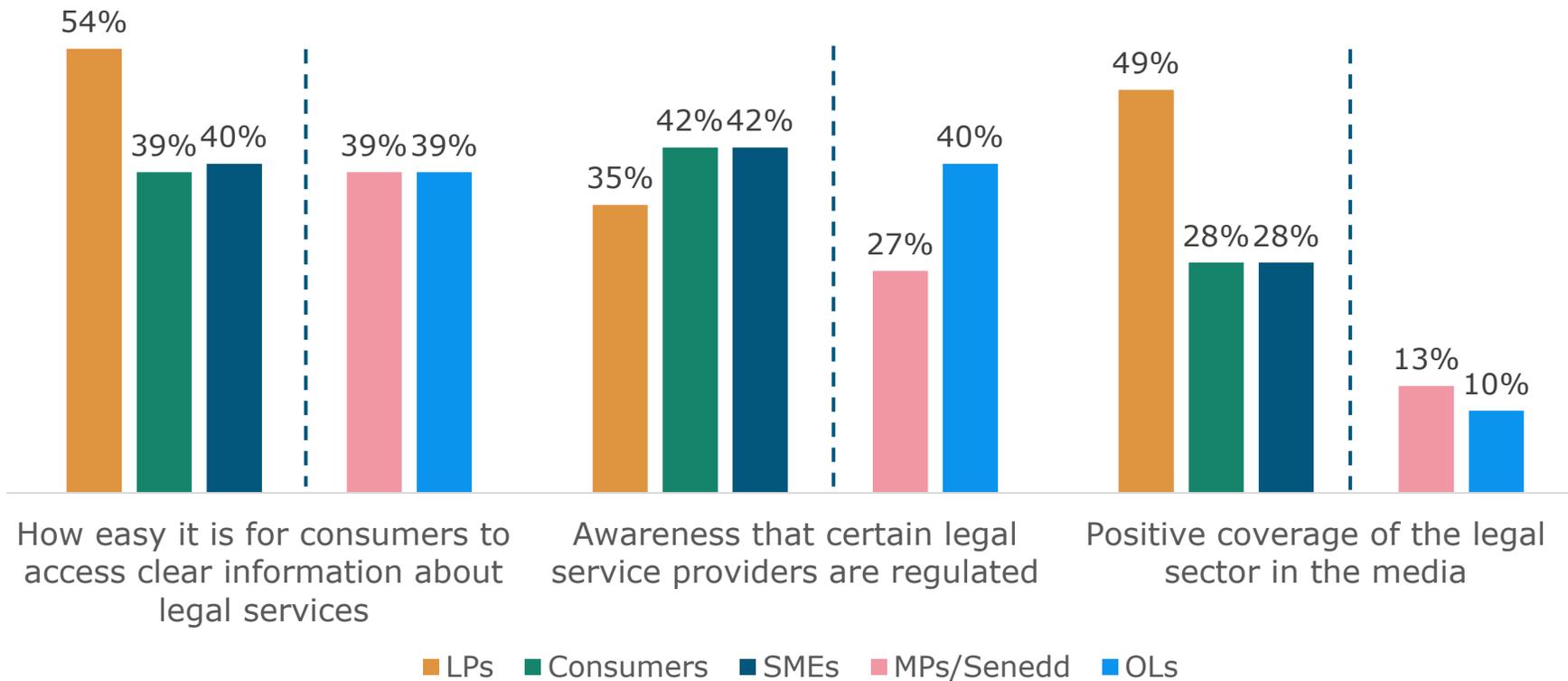
55% of Legal Professionals believe drivers of confidence and trust are **the same for users and non-users of legal services**. Key differences when focusing on non-users includes affordability and accessibility – suggesting these are considered barriers to use.

Responses from SMEs and Consumers suggest that perceived drivers are largely aligned between users and non-users. Those who have used legal services are marginally more likely to suggest **recommendations as well as good customer service** impact upon confidence and trust.

# Three drivers do not fall within the top five drivers of confidence and trust for any audience

## Factors with biggest impact on confidence and trust in legal services

% showing 'significant impact' (LPs, Consumers, SMEs) or selected in top 5 (MPs, OLS)



7<sup>th</sup> – 9<sup>th</sup>

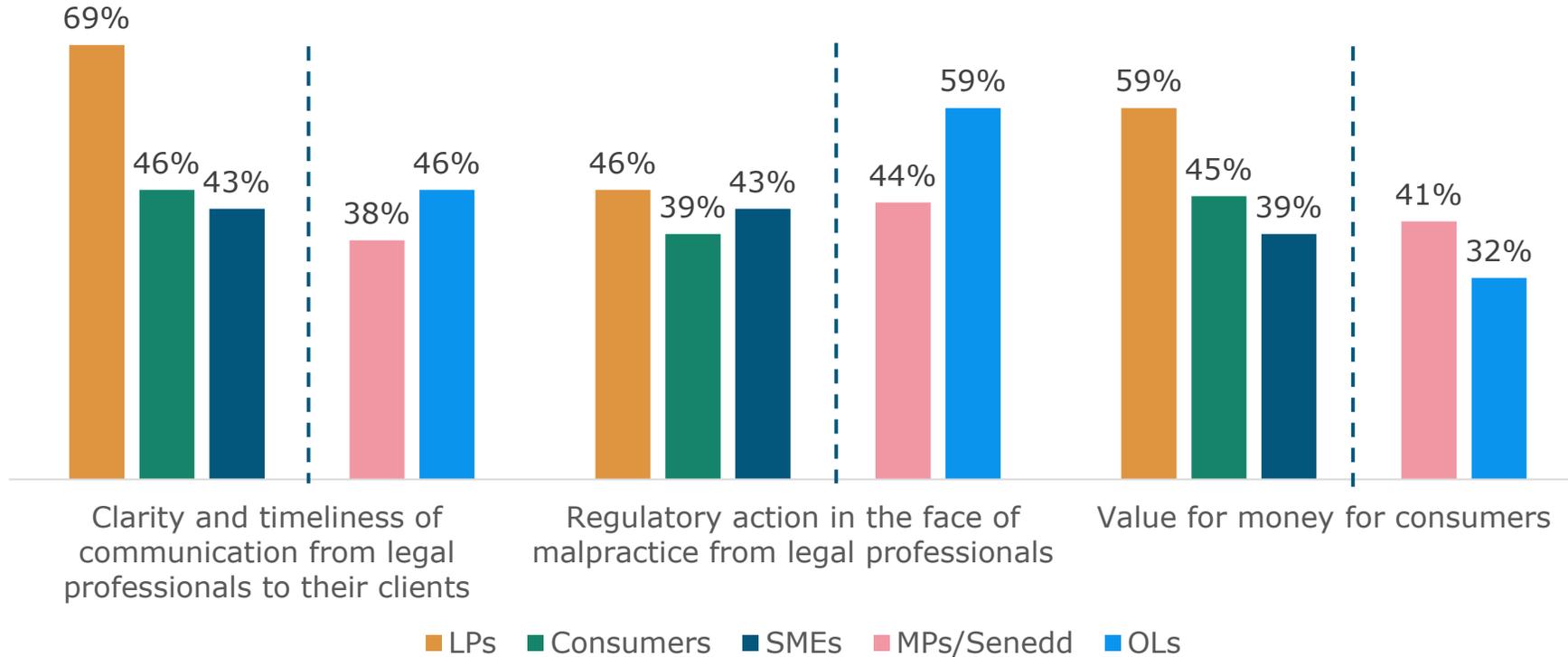
Positive media coverage is considered the **least impactful of drivers tested** for all audiences, aside from Legal Professionals who ranked this seventh.

There are no differences in levels of perceived impact of media coverage between those who have used and not used legal services.

# Value for money is one of the drivers comparatively less likely to be seen as impacting on confidence

## Factors with biggest impact on confidence and trust in legal services

% showing 'significant impact' (LPs, Consumers, SMEs) or selected in top 5 (MPs, OLS)



4<sup>th</sup> – 6<sup>th</sup>

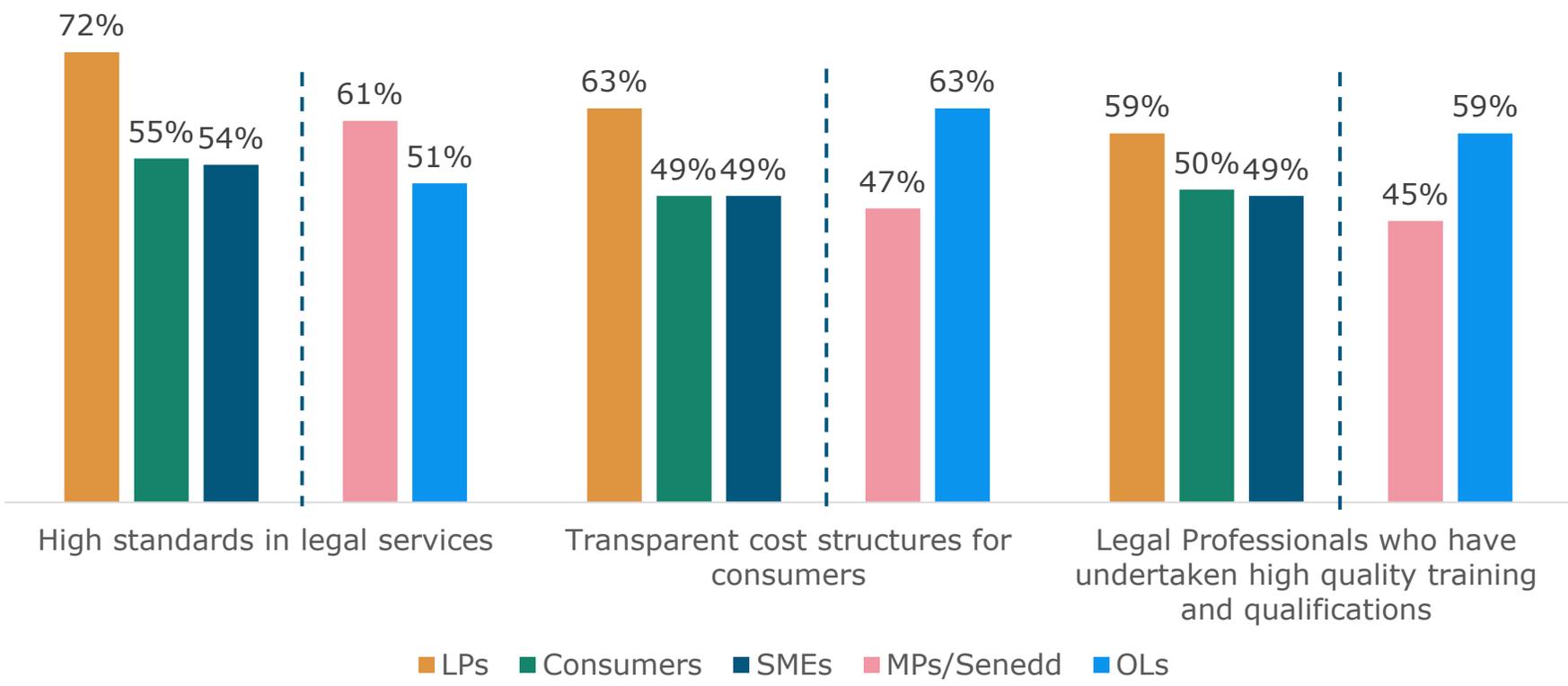
While clarity and timeliness of communication received an average ranking of four, this is **considered the second biggest driver for Legal Professionals** and seventh for MPs and Senedd members.

**Regulatory action** is key for Opinion Leaders, coming in at third overall. However, this was ranked eighth for Legal Professionals.

# High standards, cost transparency and training & qualifications seen to most drive confidence and trust

## Factors with biggest impact on confidence and trust in legal services

% showing 'significant impact' (LPs, Consumers, SMEs) or selected in top 5 (MPs, OLS)



1<sup>st</sup> – 3<sup>rd</sup>

High standards in legal services and high-quality training and qualifications are the top two factors driving confidence and trust for Consumers and SMEs who **have not used legal services**.

High standards in legal services is ranked fifth overall for **Opinion Leaders**, with cost transparency considered the biggest driver of confidence and trust.

# A third of SMEs who experienced misconduct reported the situation to a regulator

In rare cases, legal professionals might act inappropriately – for instance by telling lies, stealing from you, shutting down without telling you, breaking rules, or otherwise failing to meet required standards.

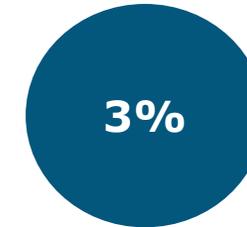
**11% of Consumers and 26% of SMEs report experiencing misconduct.**

10% of Consumers and 17% of SMEs who engaged with solicitors reported\* experiencing something going wrong.

**Didn't do anything when they experienced misconduct**

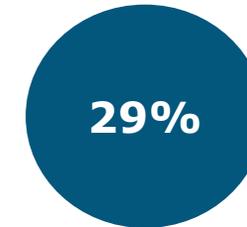


Consumers



SMEs

**Reported the situation to a legal profession regulator**



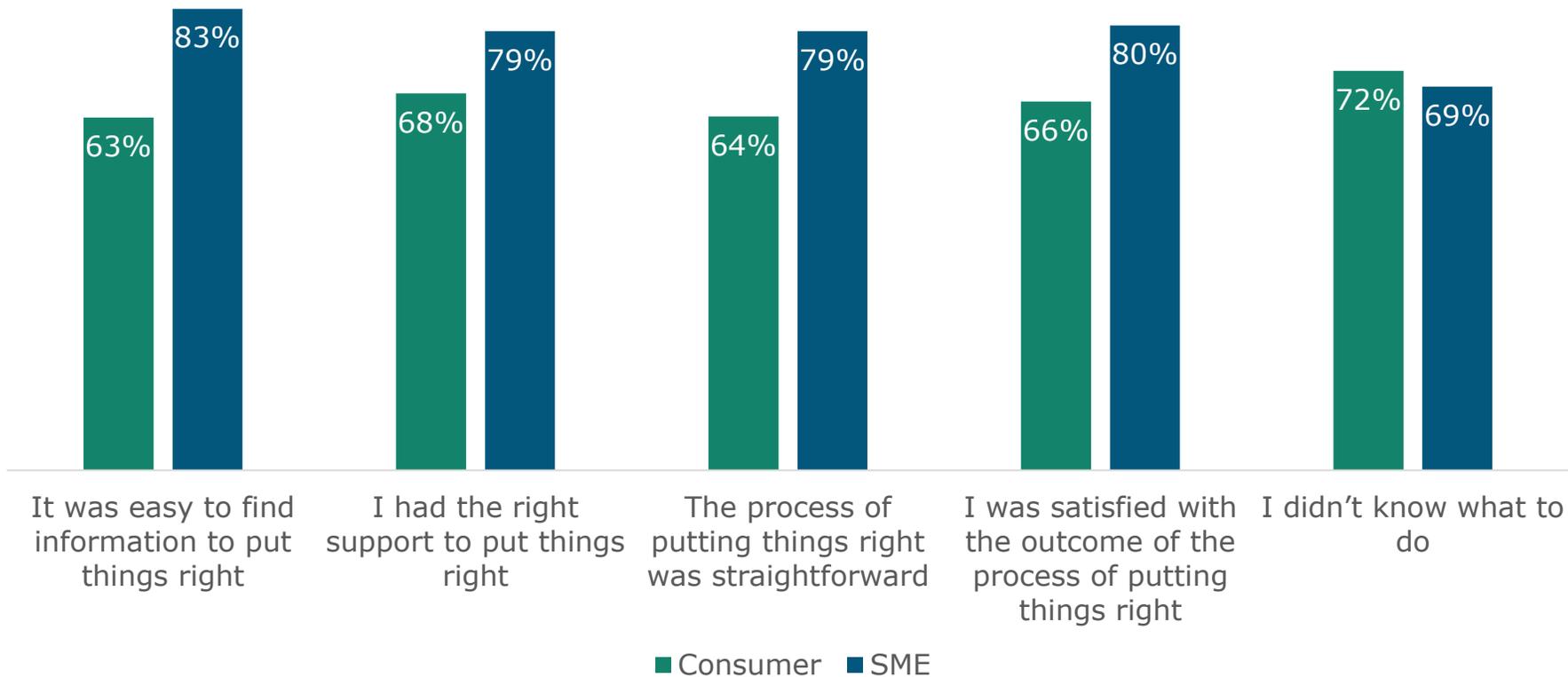
**SMEs were more likely to make a report to a regulator; most, however, don't.**

Consumers who reported experiencing misconduct were most likely to get **advice from friends or family** (30%), contact another legal professional (25%) or make a complaint to the firm they were using (24%). SMEs were likely to **escalate the situation internally** (20%), get advice from friends/family (33%) or peers (29%), contact another legal professional (29%) or seek independent legal advice about taking action (27%).

# Most unsure what to do in face of misconduct, but ultimately found the right information or support

## Experience when things went wrong

Asked to those who experienced misconduct. Showing % 'somewhat' and 'strongly' agree



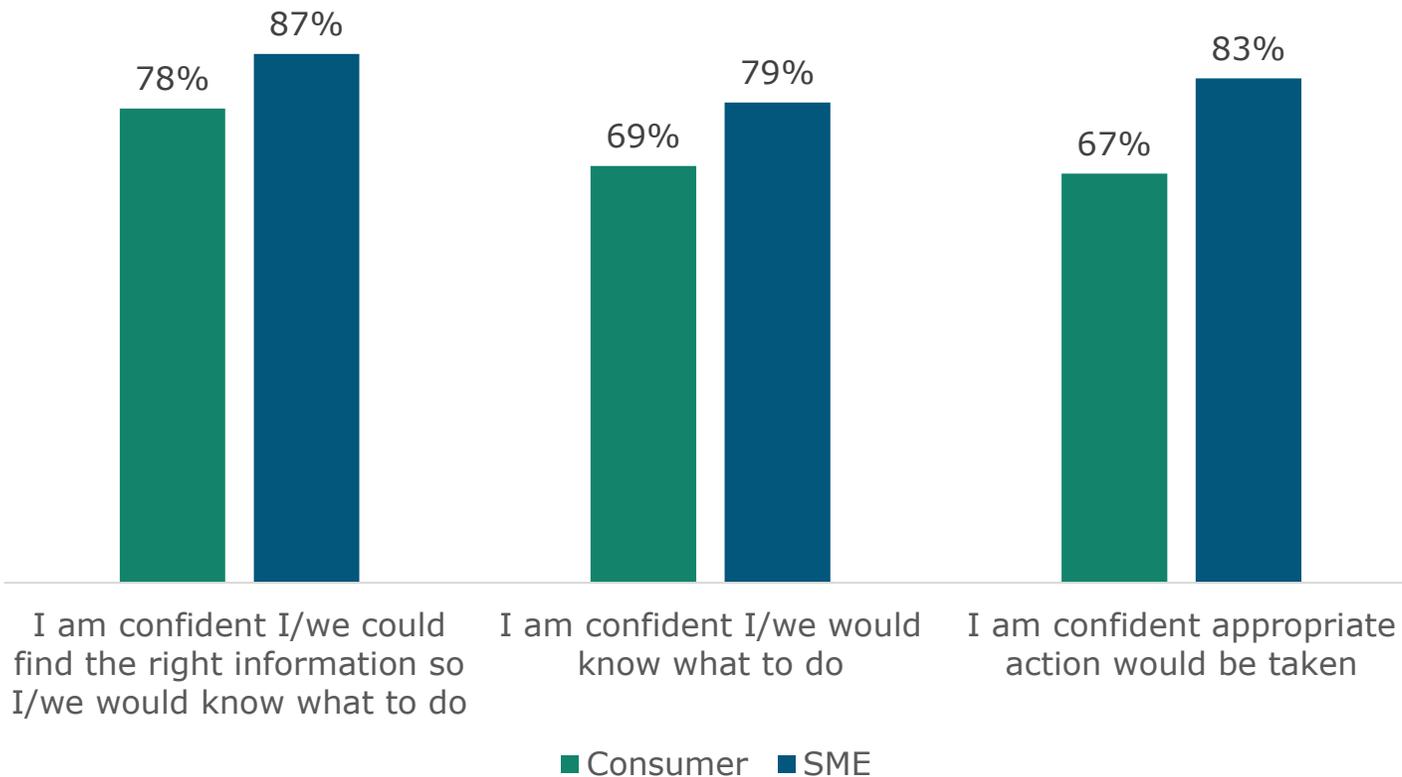
**Consumers** appear **less equipped to act** when something goes wrong compared to SMEs.

SMEs have more access to workplace support including access to legal experts or processes in place to deal with such issues. **SMEs are more Confident in acting than consumers**, and in qualitative interviews, few described confidently the process of doing so.

# High proportions feel they'd know what to do if something went wrong, but not many act on this

## Confidence knowing what to do if something went wrong

Showing % 'somewhat' or 'strongly' agree



Confidence levels do not align with reality, with 72% of Consumers and 69% of SMEs reporting they did not know what to do when faced with something going wrong.

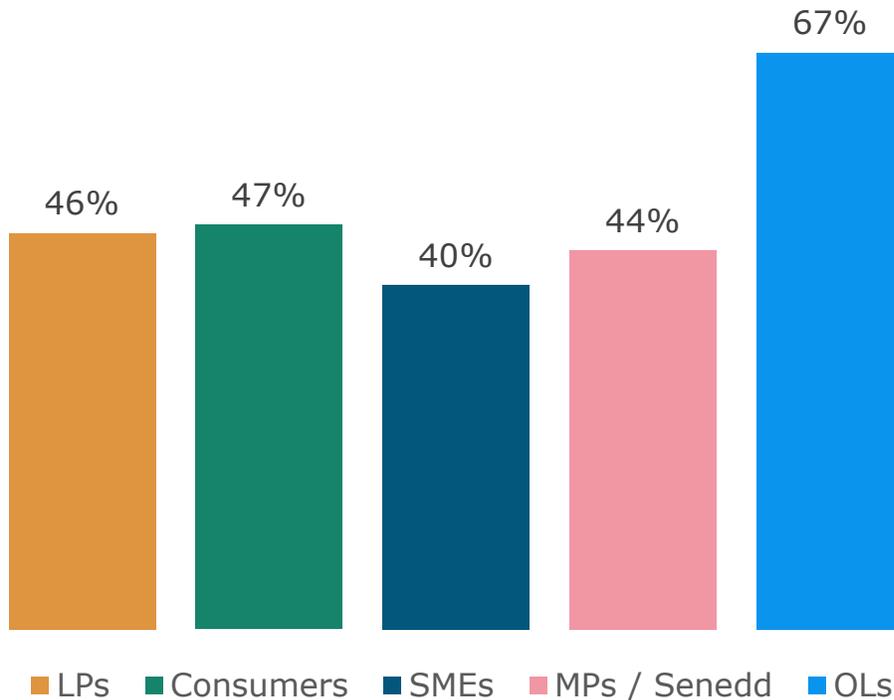
Consumers who have **used legal services** before are more confident (79%) they could find the right information than those who have not (70%).  
  
Those with **high knowledge of the SRA** are more confident they would know what to do (Consumers 87% and SMEs 92%). This indicates that **awareness of the SRA's role and regulatory action** increases confidence and trust.

# Opinion Leaders believe this is a key area for the SRA to play a role in to drive confidence and trust

Factors for the SRA to play a role in to support confidence and trust:

Regulatory action (re. malpractice from LPs)

% showing selected top 5



During the exploratory phase, **Opinion Leaders** perceived regulators as the “guardians of public trust”, responsible for maintaining high-quality service and offering recourse to consumers in case of issues. Consumer protection was seen as a key role of the SRA; therefore, it is unsurprising that Opinion Leaders rank this as the most important factor for the SRA to support to drive confidence and trust in legal services.

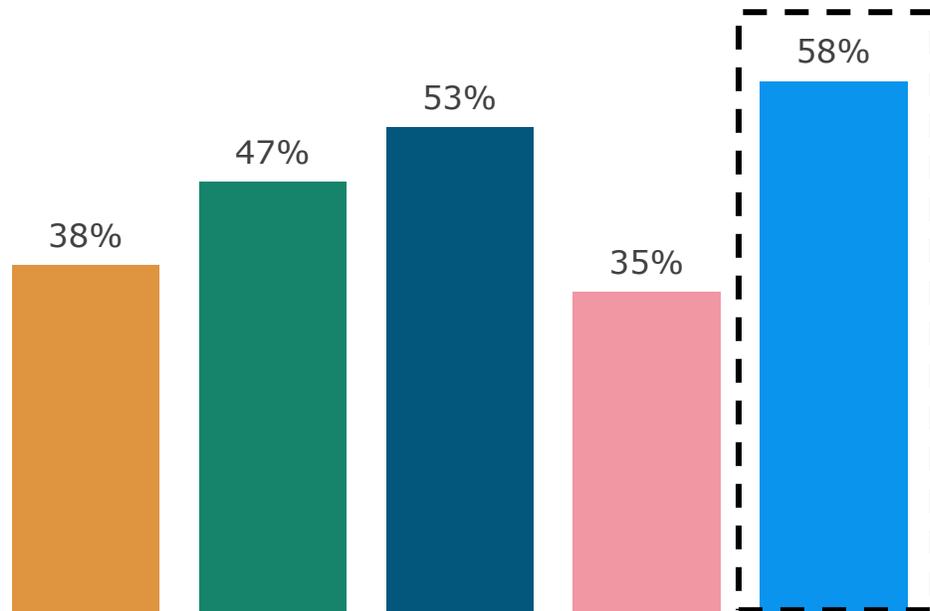
**SMEs** are less likely to consider this an important area for the SRA to play a role in (ranked fifth), perhaps as they feel more confident or equipped to deal with problems when they arise overall.

Just under half of **Legal Professionals** consider this an important area for the SRA, perhaps due to dissatisfaction with the SRA’s regulatory action more generally.

# Opinion Leaders particularly expect the SRA to lead on cost transparency, as it is linked to access to justice

Factors for the SRA to play a role in to support confidence and trust:

**Transparent cost structure**  
 % showing selected top 5



■ LPs ■ Consumers ■ SMEs ■ MPs / Senedd ■ OLs

Opinion Leaders particularly expect the SRA to lead on transparent cost structures – this is their **third priority area** for the SRA to focus on when driving confidence and trust.

In the qualitative phase, Opinion Leaders **linked cost transparency with access to justice**. We heard access to justice often incorporates both **financial access** (relating to legal aid) and consumers having the confidence and **knowledge to navigate** the legal services market:

*"[For confidence and trust] people who use legal services or would like to use legal services, or have a need for legal services, they feel they can access those legal services without having too much difficulty. Knowing that they will be treated with respect and treated well and fairly when they do get them. It's very much an accessibility angle."*  
 - Opinion Leader

These two are linked, with transparency driving a sense of value for money

## Value for money



When Consumers refer to value for money, they expect:

- ✓ **Affordable** legal services
- ✓ **Proportionate and appropriate** to the legal services they have received
- ✓ **High quality standards and services**, which reflect the cost

*"I want a a fair costing structure that normal people can afford...  
There has been some heavy increases in cost."*

- Consumer

## Transparent cost structures



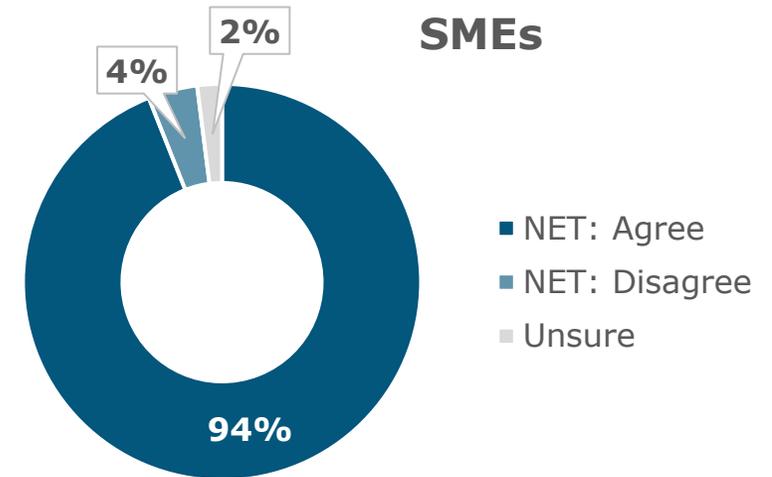
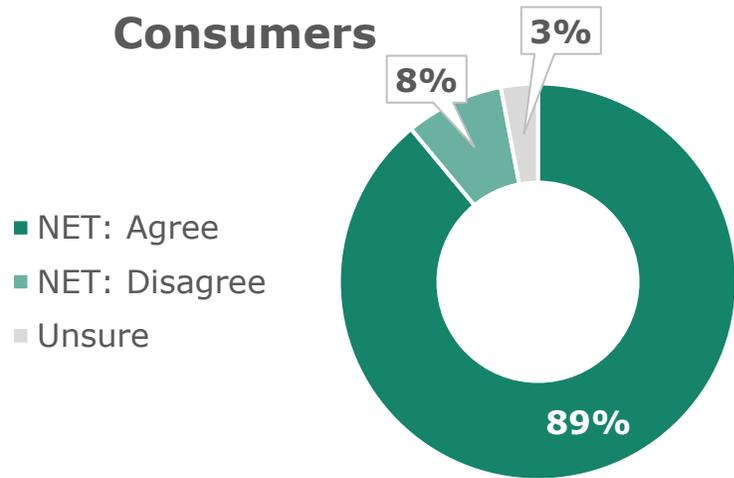
When discussing cost transparency, Consumers expect:

- ✓ **Clear pricing structures**, actively communicated by their legal services providers, which support their decision-making and allow them to hold their legal services providers accountable
- ✓ **Fixed prices**, without any hidden fees
- ✓ Prices which are **in line with industry rates**, which are fair and justifiable

*"They offer a good service but there have been services where they've charged me for the work, but they haven't updated me. I do believe they charge a lot of money. There needs to be some sort of cap on how much they can charge."*

- Consumer

# When prompted, Consumers and SME views reflect the importance of this safeguard and consumer protection



Among Consumers who **agree** they feel more confident using regulated legal services:

- ✓ 90% who've never used legal services
- ✓ 91% had previously engaged with solicitors
- ✓ Most important for those accessing conveyancing (94%) and probate (94%) services

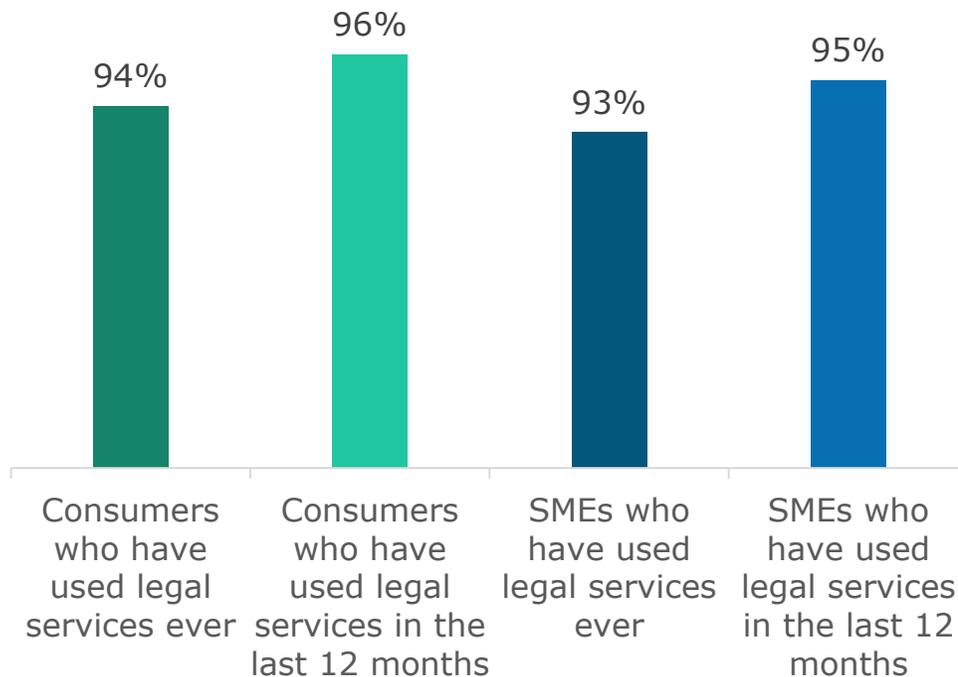
Among SMEs who **agree** they feel more confident using regulated legal services:

- ✓ Those who use legal services regularly (93%)
- ✓ 95% of Executive management
- ✓ 95% had previously previously engaged with solicitors

# Consumers and SMEs suggest it is important to choose a legal services provider who is regulated

## Importance that chosen legal provider was regulated during decision-making

Showing 'quite' and 'very' important



**Consumers** who used legal services in the last 12 months are likely to **indicate low awareness of the SRA** (68%), compared to of SMEs (21% with low awareness).

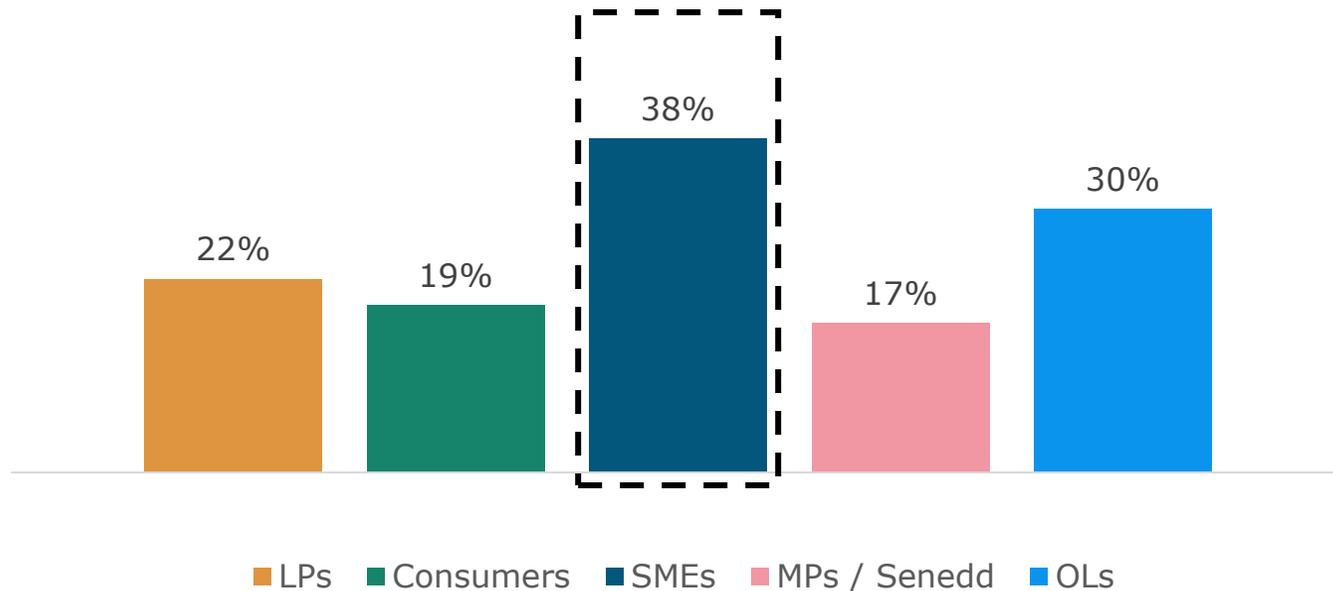
This may suggest that **Consumers are unlikely to seek out regulatory information** when choosing a legal provider. This finding reinforces the qualitative insight, that Consumers assume legal providers are all regulated.

Furthermore, there are **no significant differences** in agreement levels that legal services are well regulated between Consumers who hold low and high levels of awareness of the SRA – whereas SMEs with high awareness hold significantly higher levels of agreement (84% vs. 68% with low awareness).

This suggests that **increased awareness may not significantly impact Consumers' belief that legal services are well regulated**, nor their confidence and trust – but it may reinforce SMEs.

# Audiences are unlikely to consider awareness building an important area for the SRA to prioritise

Factors for the SRA to play a role in to support confidence and trust:  
**Building awareness of SRA's regulatory work**  
*% selected top 5*



**SMEs** feel more strongly that the SRA increasing awareness of its regulatory work will increase confidence and trust in legal services, compared to other audiences. Nonetheless, this is still ranked seventh overall for this stakeholder group.

Knowing how the SRA can support is truly valuable to SMEs. They report using SRA guidance to find regulated legal professionals or report malpractice. The qualitative findings point to visibility of the SRA increasing confidence and trust for SMEs.

# Most stories heard were passed on by word of mouth rather than picked up in the media

## Positive stories

**Word of mouth** was the key medium for positive stories in the last three months. Most recall hearing good feedback on a legal experience from a friend or family member. Key themes from stories include good customer service, professionalism, expert knowledge, support and high standards. Several SMEs also reported hearing positive outcomes related to fraud and scams.

**Media stories** which have been viewed positively by Consumers and SMEs include the legal work undertaken for the Post Office Horizon scandal, the Infected Blood Inquiry and legal aid for those in need.

## Negative stories

Similarly, most negative stories were heard via **word of mouth** from those who had poor experiences when using legal services. Key themes link to high expense, being 'fleeced for more money', and slow processes and communication (especially for conveyancing). There were also perceptions of professionals defending people who are 'in the wrong' and an old boys' club system which lacked diversity.

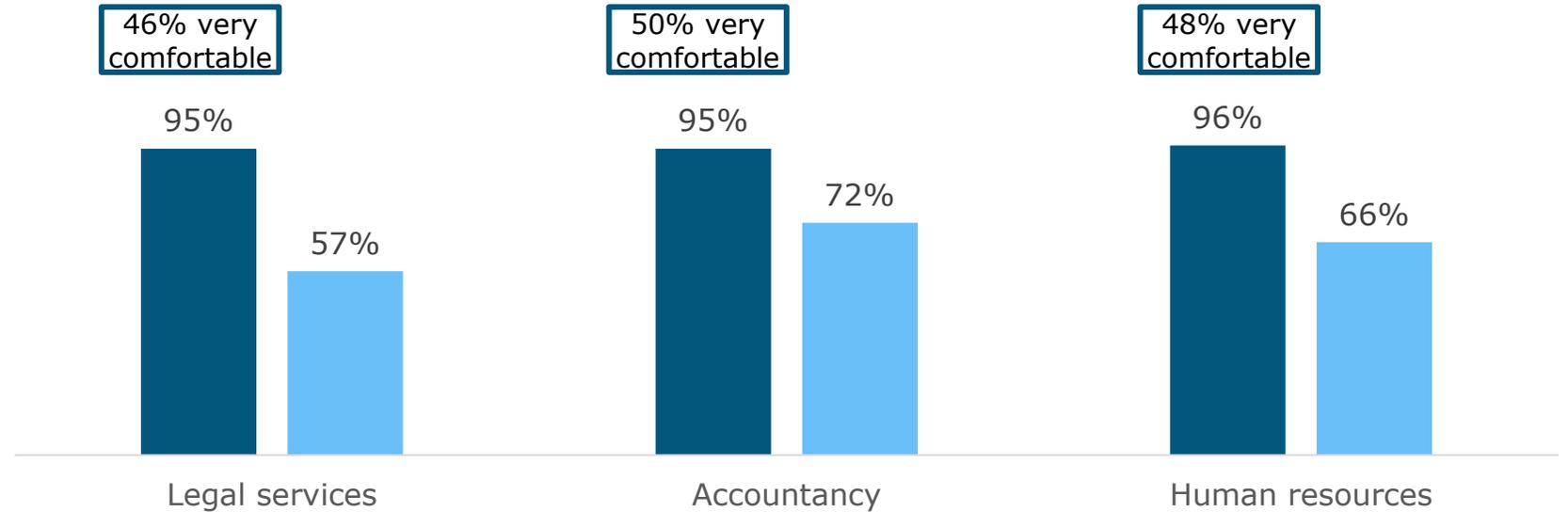
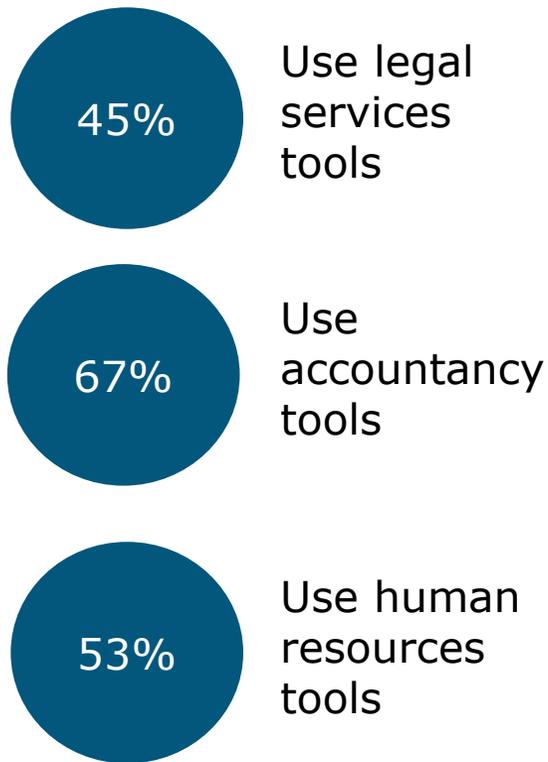
While most of the positive **media stories** related to the Post Office Horizon scandal, there were also some negative perceptions about the delayed justice sub postmasters had received. Other negative stories included strikes related to pay as well as support for asylum seekers and perceptions of lenient immigration laws.

# Four in ten SMEs report using legal service tools, although are more likely to use accountancy tools

## Levels of comfort using specialist tools

Showing % comfortable

■ Those who have used tools   ■ Those who have not used tools



Of those who do **not** use specialist tools, confidence appears lowest for using legal service tools – with just over half of this sample (57%) suggesting they'd feel comfortable using this type of tool.



## 2. Sample details



# Legal Professionals - profile

Region	Total	Panel	SRA sample
North Wales	1%	1%	1%
South-West Wales	1%	1%	1%
South-East Wales (including Cardiff)	3%	5%	1%
Mid and West Wales	0%	0%	0%
Valleys	1%	0%	1%
London	31%	22%	37%
South-East England (excluding London)	13%	15%	12%
South-West England	6%	5%	7%
East Midlands	6%	6%	6%
West Midlands	7%	8%	6%
North-East England	4%	6%	2%
North-West England	13%	15%	12%
East of England	4%	5%	4%
Yorkshire and the Humber	9%	8%	9%
Channel Islands	1%	0%	2%

NET: England  
**94%**

NET: Wales  
**6%**

NET: White  
**74%**

NET: Ethnic  
minority  
**26%**

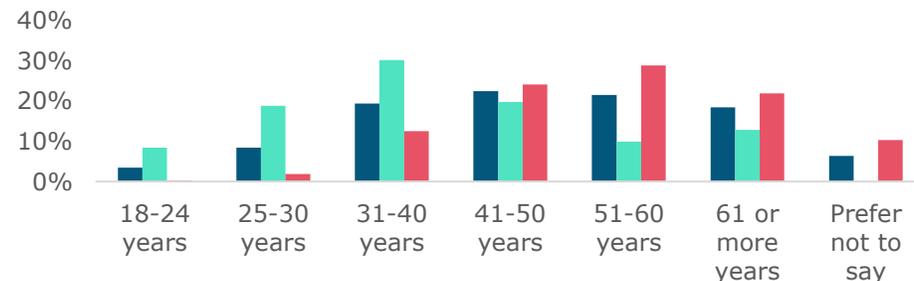
## Ethnicity

	Total	Panel	SRA sample
Asian or Asian British – Bangladeshi	1%	2%	0%
Asian or Asian British – Chinese	1%	1%	1%
Asian or Asian British – Indian	3%	4%	3%
Asian or Asian British – Pakistani	2%	2%	3%
Any other Asian background	1%	1%	1%
Black or Black British – African	3%	5%	1%
Black or Black British – Caribbean	1%	1%	1%
Mixed ethnic background – White and Asian	1%	1%	1%
Mixed ethnic background – White and Black Caribbean	1%	1%	0%
Mixed ethnic background – White and Black African	1%	0%	1%
Any other mixed ethnicity	2%	2%	2%
White – British	65%	73%	60%
White – Irish	2%	1%	3%
Any other White background	7%	2%	10%
Arab	1%	1%	0%
Prefer not to say	8%	0%	13%
Prefer to self-describe	1%	0%	2%

## Gender

	Total	Panel	SRA sample
Male	46%	52%	42%
Female	47%	47%	46%
Prefer not to say	7%	0%	11%

## Age

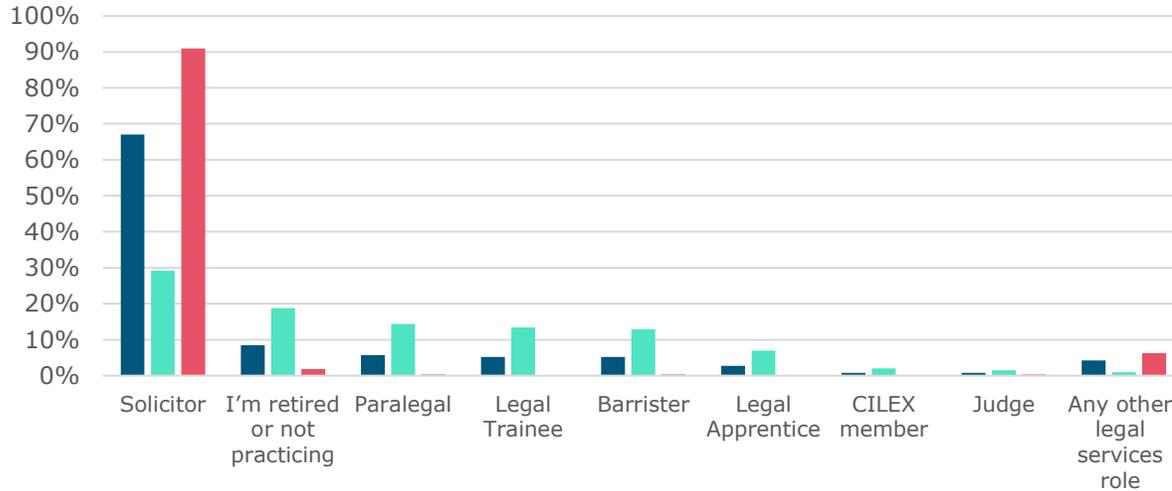




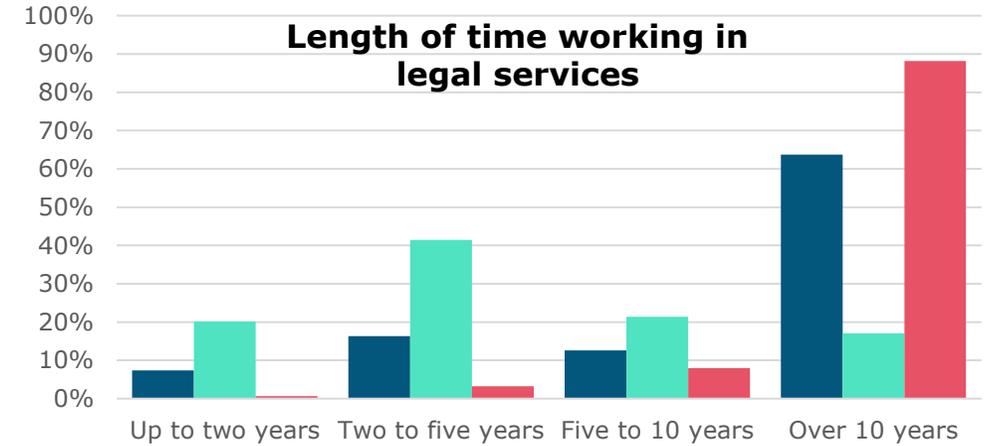
# Legal Professionals - profile

■ Total sample 
 ■ Panel sample 
 ■ SRA sample

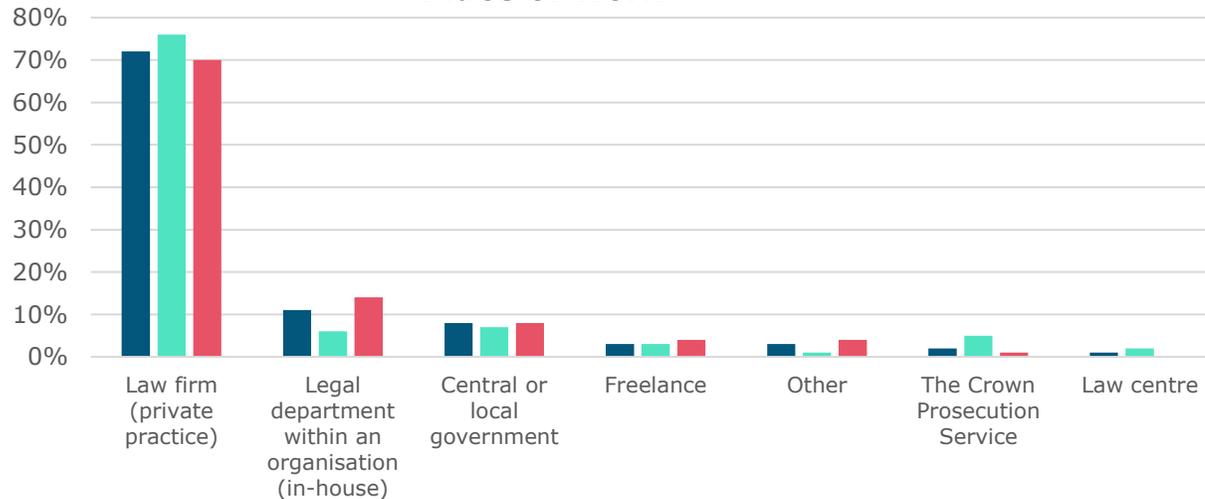
**Job Type**



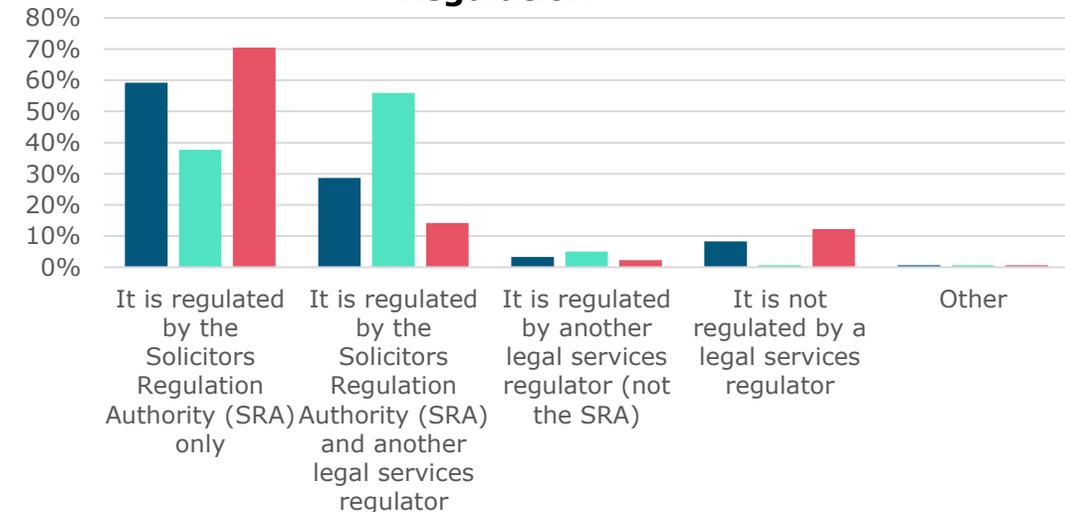
**Length of time working in legal services**



**Place of work**



**Regulation**

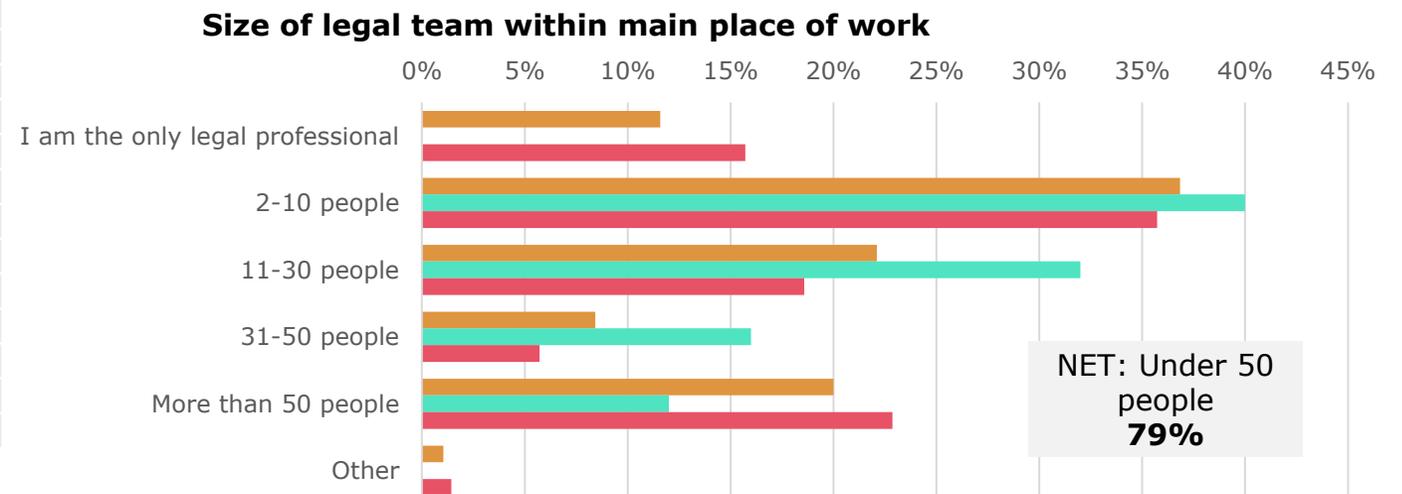
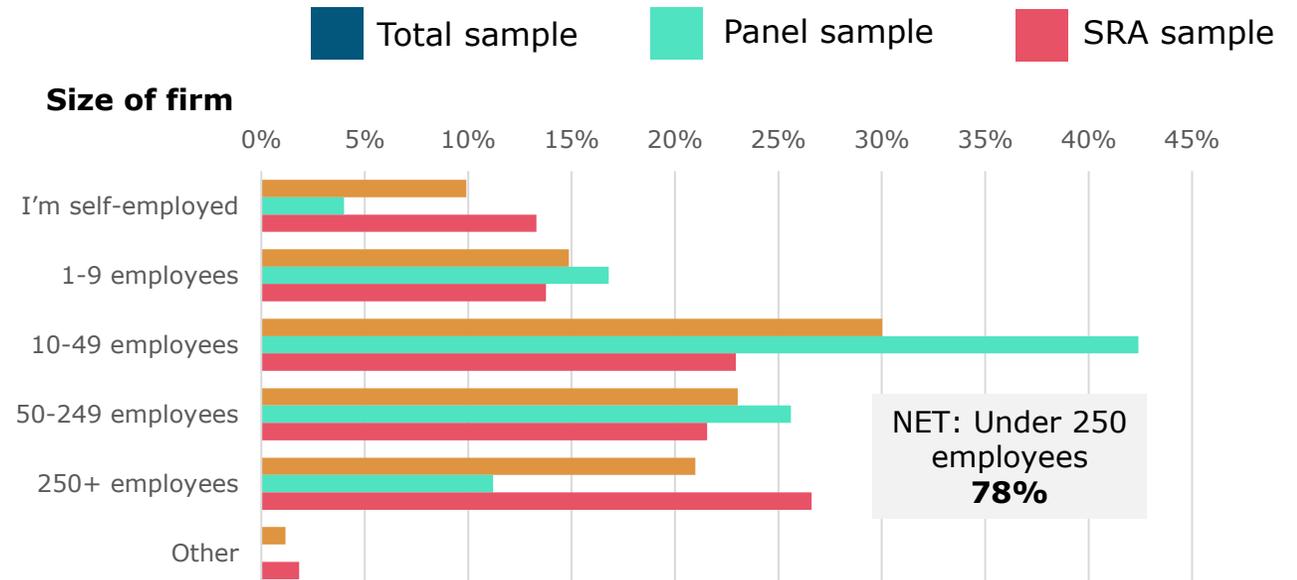


Asked to LPs - Q1: Which of the following best describes your job role? If you're currently on leave or seeking work, please select your last role, Q2: How long have you been working within legal services? Q4: Which of the following best describes where your work? Base n=521



# Legal Professionals - profile

Area of practice	Total	Panel	SRA sample
Banking and finance law	12%	17%	10%
Clinical negligence law	5%	8%	3%
Commercial law	23%	20%	25%
Competition law	4%	5%	3%
Construction law	6%	7%	5%
Corporate law	16%	17%	15%
Criminal law	14%	25%	7%
Employment law	13%	15%	12%
Environmental law	5%	9%	3%
Family law	18%	27%	12%
Human rights law	8%	15%	4%
Gaming law	2%	4%	1%
Immigration law	8%	12%	6%
Intellectual property law	8%	9%	8%
International law	5%	6%	4%
Int. environmental law	2%	3%	1%
Maritime law	3%	4%	2%
Media law	5%	6%	4%
Property law	21%	16%	24%
Public law	11%	12%	11%
Social welfare	6%	11%	2%
Sports law	3%	5%	2%
Tax law	6%	9%	3%
Tort law	6%	4%	7%
Wills and probate	12%	9%	13%
Other	16%	7%	22%





# Opinion Leaders - profile

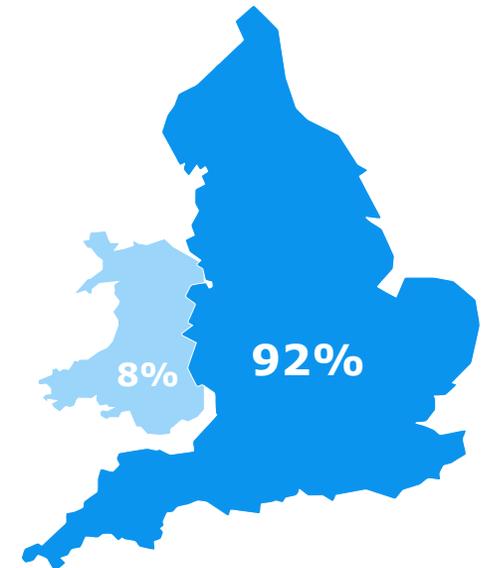
## Business Sector

Not applicable - not currently employed	50%
Other	12%
Financial services	6%
Education	6%
IT & Telecoms	5%
Manufacturing	4%
Media/ marketing/ advertising/PR & sales	4%
Medical & health services	4%
Retail	2%
Legal	2%
Real estate	2%
Construction	1%
Hospitality and leisure	1%
Accountancy	1%

## Seniority Level

Not applicable - don't work	34%
Owner/ proprietor	18%
Not applicable - don't have any management responsibility	10%
Middle manager	9%
Junior manager/ team leader/ supervisor	7%
Chief executive	6%
Other senior manager or director below board level	6%
Partner	3%
Managing director	3%
Other board level manager/ director	2%
Non-executive director	1%
Other	1%

## Region





# SMEs - profile

## Region

North Wales	5%
South-West Wales	6%
South-East Wales (including Cardiff)	10%
Mid and West Wales	4%
Valleys	3%
London	13%
South-East England (excluding London)	11%
South-West England	6%
East Midlands	8%
West Midlands	7%
North-East England	4%
North-West England	12%
East of England	6%
Yorkshire and the Humber	7%

NET: England  
**72%**

NET: Wales  
**28%**

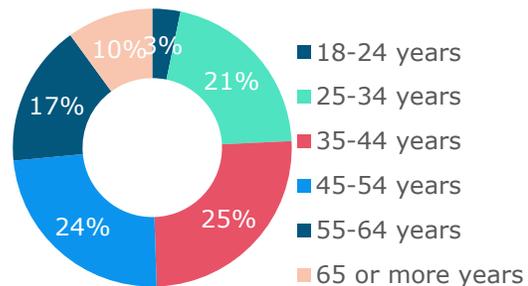
NET: White  
**80%**

NET: Ethnic  
minority  
**20%**

## Ethnicity

Asian or Asian British - Bangladeshi	1%
Asian or Asian British - Chinese	2%
Asian or Asian British - Indian	3%
Asian or Asian British - Pakistani	1%
Any other Asian background	1%
Black or Black British - African	7%
Black or Black British - Caribbean	2%
Mixed ethnic background - White and Asian	1%
Mixed ethnic background - White and Black Caribbean	1%
Mixed ethnic background - White and Black African	1%
White - British	77%
White - Irish	1%
Any other White background	3%

## Age



## Gender

Male	56%
Female	44%

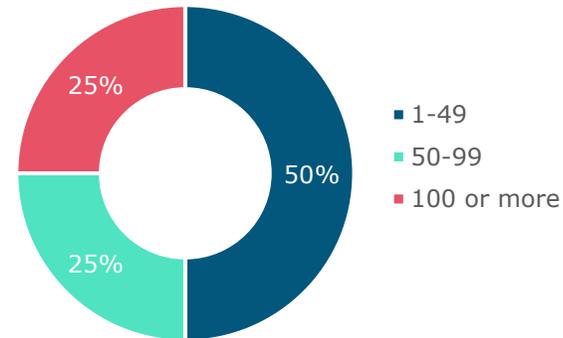


# SMEs - profile

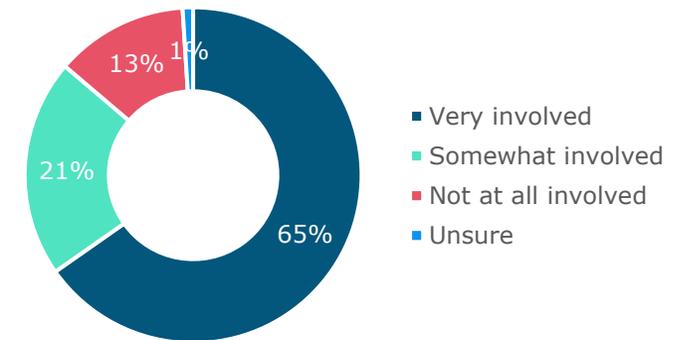
## Business sector

Accommodation & food	5%
Agriculture, forestry & fishing	1%
Arts & culture	6%
Business administration & support	7%
Construction	10%
Consultancy	4%
Education	9%
Finance & insurance	7%
Government & public sector	3%
Health and social care	7%
Hospitality & entertainment	3%
IT & communications	14%
Manufacturing & distribution	7%
Other services	4%
Professional & technical	7%
Real estate	3%
Retail & wholesale	12%
Security & defence	1%
Transport & storage	3%
Utilities and energy	1%
Other industry not listed	7%

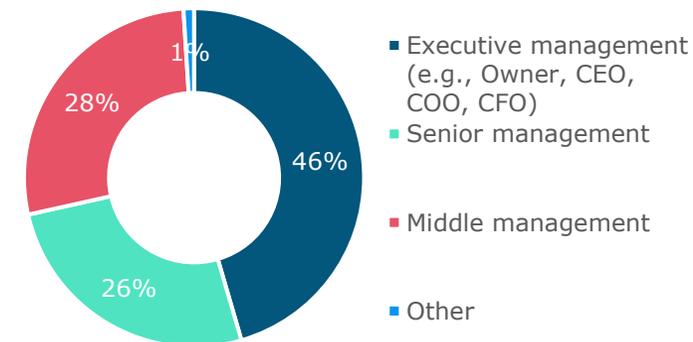
## Size of business



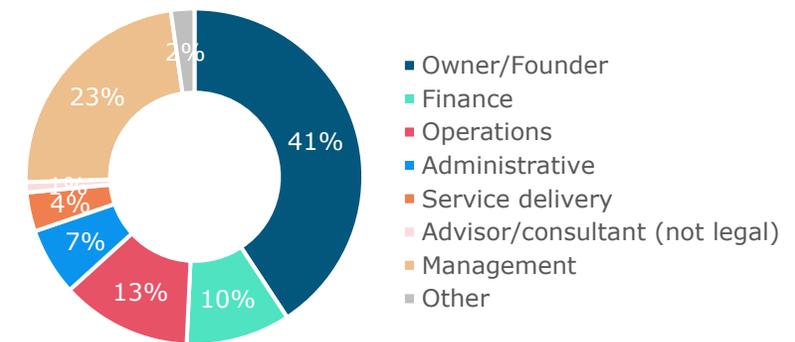
## Involvement in choosing legal services



## Seniority level



## Role in businesses





# MPs / Senedd - profile

## MPs / Senedd breakdown

MPs	88
Senedd	11

	MPs	Senedd
Male	57%	9%
Female	31%	3%

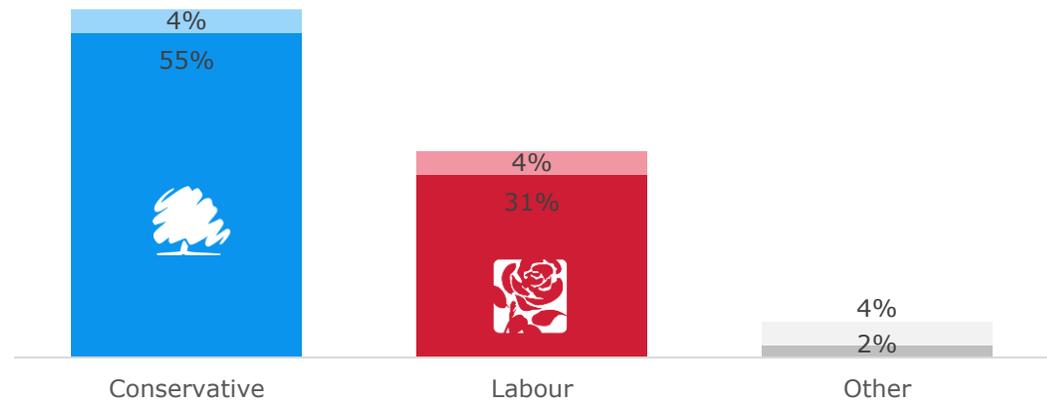
## Region (MPs)

South-East, South-West, East	4
London	1
North-East, North-West, Yorkshire and the Humber	1
East Midlands, West Midlands	5

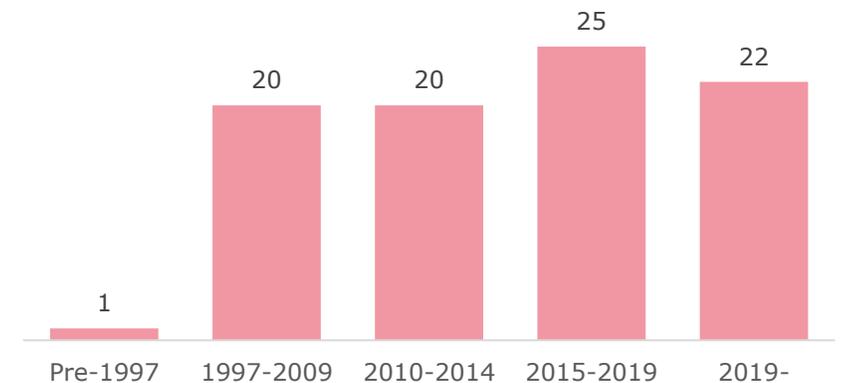
## Region (Senedd)

North Wales	4
Mid Wales and West Wales	1
South Wales (West)	1
South Wales (East)	5

## Political party



## Year





# Consumers

## Region

North Wales	2%
South-West Wales	1%
South-East Wales (including Cardiff)	2%
Mid and West Wales	1%
Valleys	1%
Scotland	0%
Northern Ireland	0%
London	13%
South-East England (excluding London)	15%
South-West England	10%
East Midlands	8%
West Midlands	10%
North-East England	4%
North-West England	12%
East of England	11%
Yorkshire and the Humber	9%

## Gender

Male	51%
Female	49%

NET: England  
**93%**

NET: Wales  
**7%**

NET: White  
**83%**

NET: Ethnic  
minority  
**17%**

## Ethnicity

Asian or Asian British – Bangladeshi	1%
Asian or Asian British – Chinese	1%
Asian or Asian British – Indian	2%
Asian or Asian British – Pakistani	2%
Any other Asian background	1%
Black or Black British – African	3%
Black or Black British – Caribbean	1%
Mixed ethnic background – White and Asian	1%
Mixed ethnic background – White and Black Caribbean	1%
Mixed ethnic background – White and Black African	1%
Any other mixed ethnicity background	1%
White – British	78%
White – Irish	1%
Any other White background	4%
Arab	1%
Any other ethnic group	1%

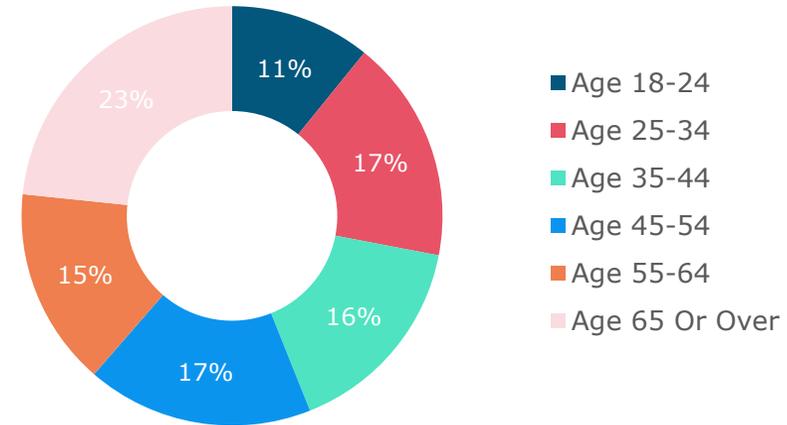


# Consumers

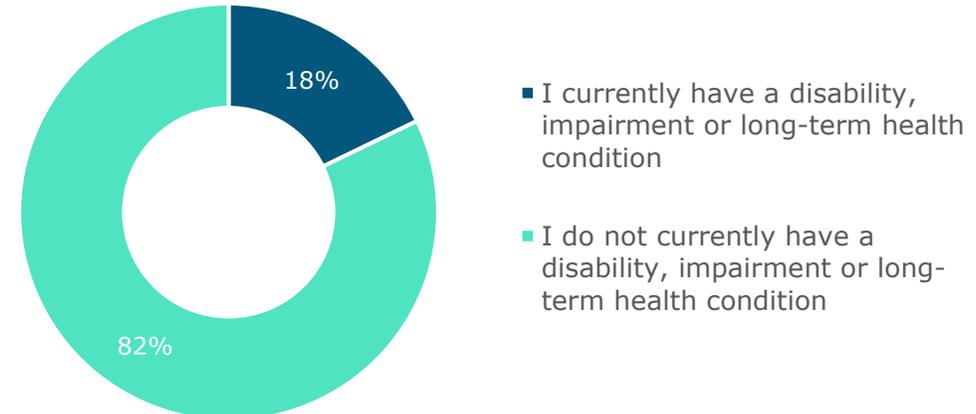
## Region

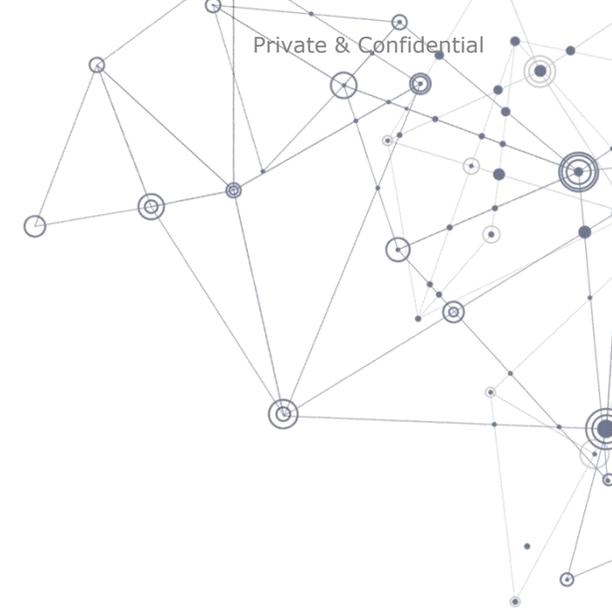
Higher managerial, administrative and professional	6%
Intermediate managerial, administrative and professional	20%
Supervisory, clerical and junior managerial, administrative and professional	29%
Skilled manual worker	21%
Semi-skilled manual worker	9%
Unskilled manual worker	2%
Casual worker	2%
State pensioner	8%
Unemployed with state pension	2%

## Age



## Disability



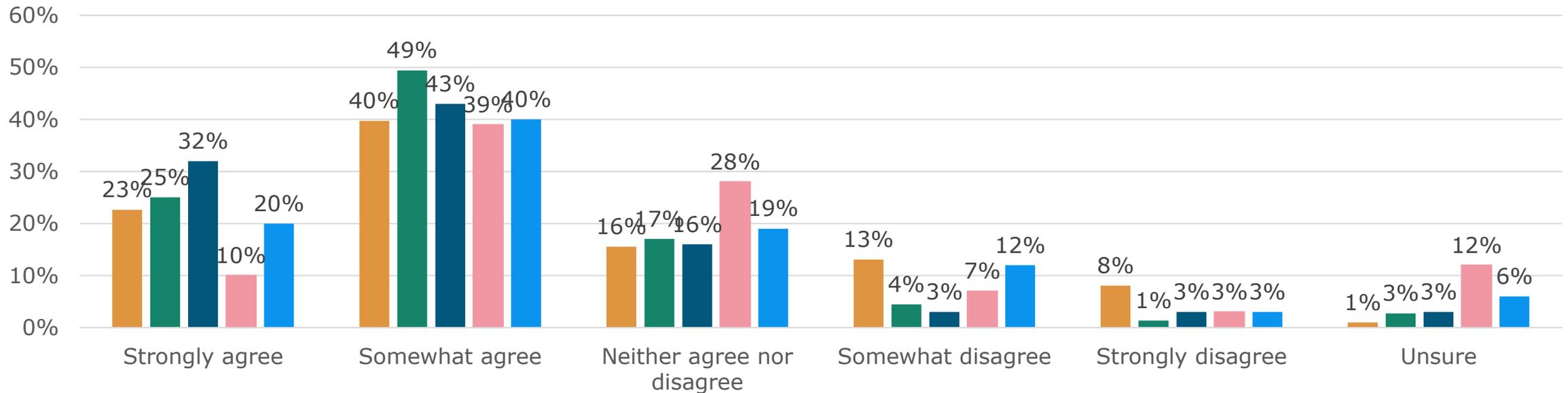


## 3. Charts with additional labels

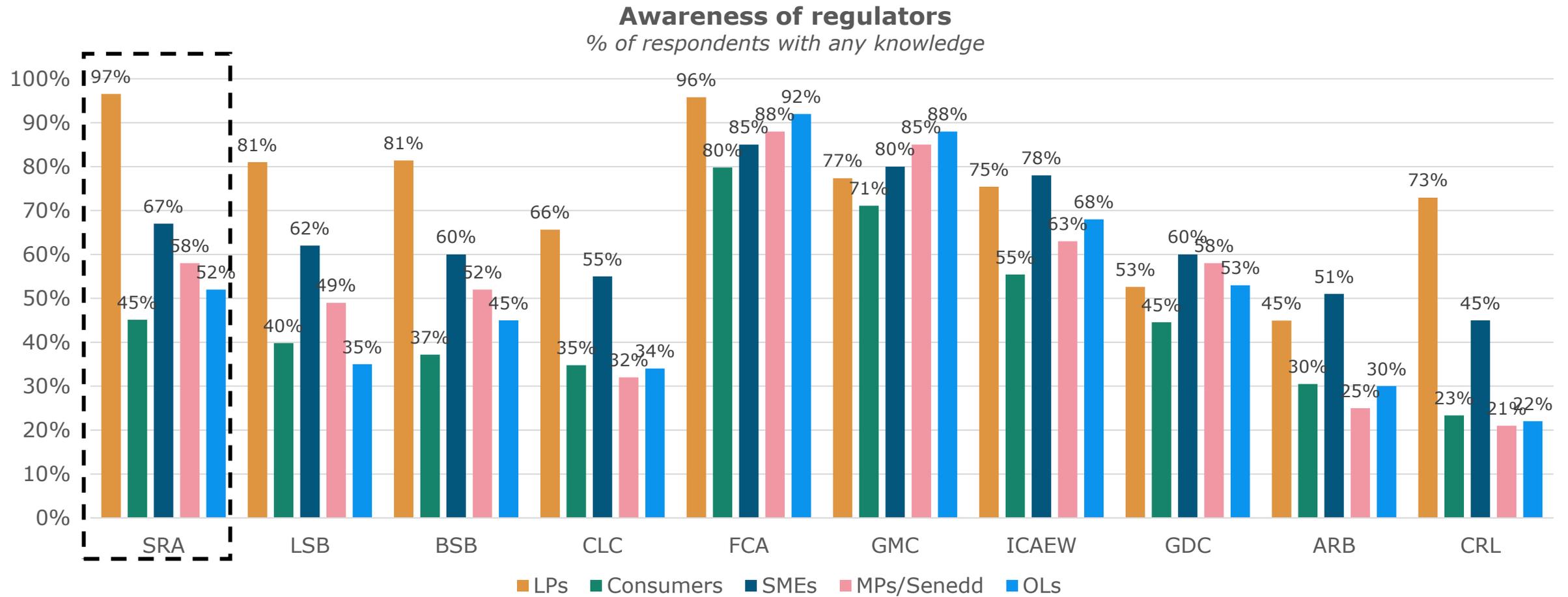
# Most audiences believe legal services are well regulated, particularly Consumers and SMEs

## I believe legal services are well regulated

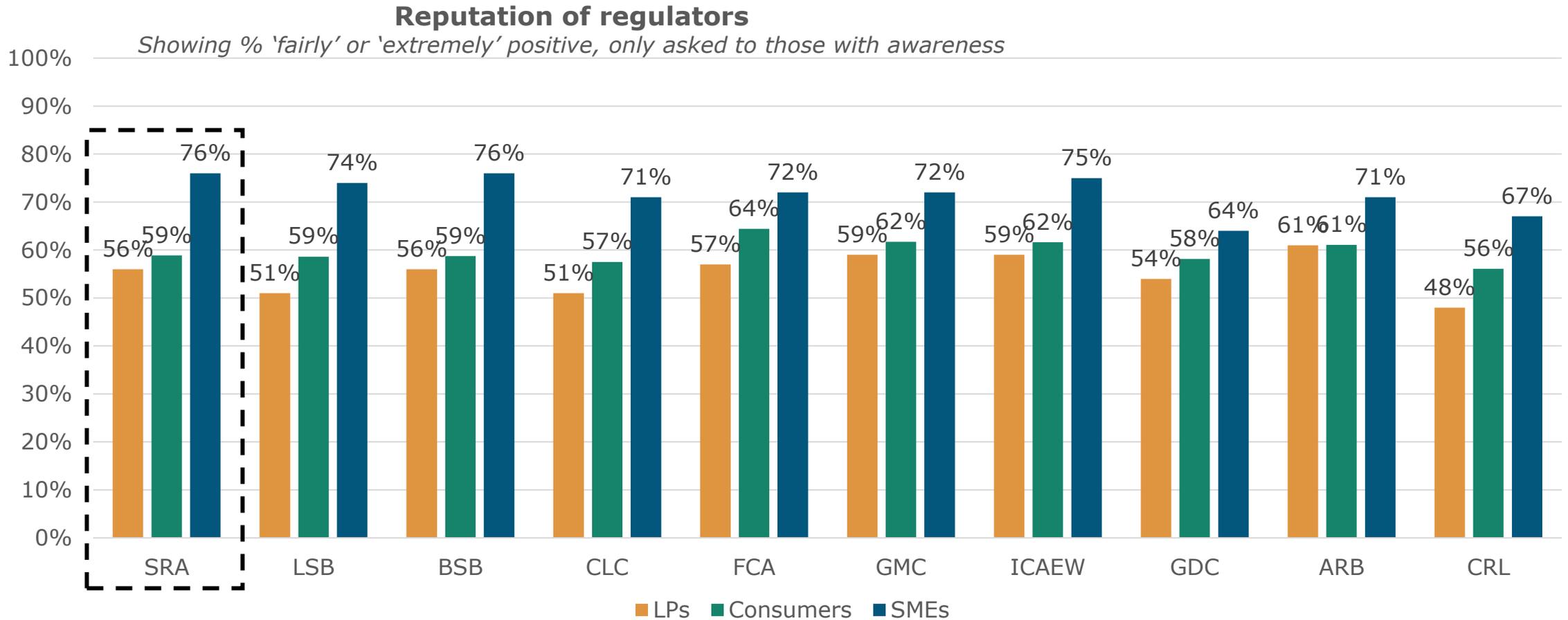
■ LPs ■ Consumers ■ SMEs ■ MPs / Senedd ■ OLs



# Audience awareness of the SRA is largely in line with levels of awareness of other regulators



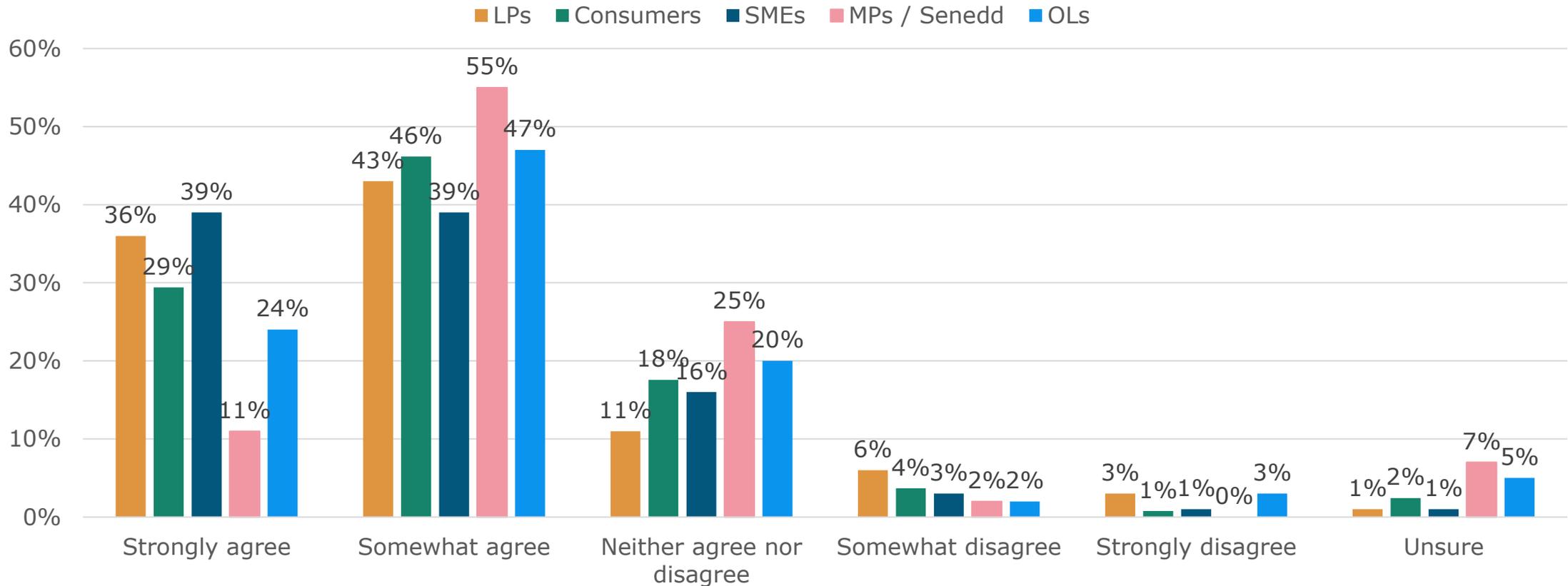
# Reputation levels of regulators are largely similar



# All audiences believe it is the SRA's role to drive confidence and trust in legal services

## It is the SRA's role to build confidence and trust in legal services

(asked to non-LP audiences who have some awareness of the SRA)

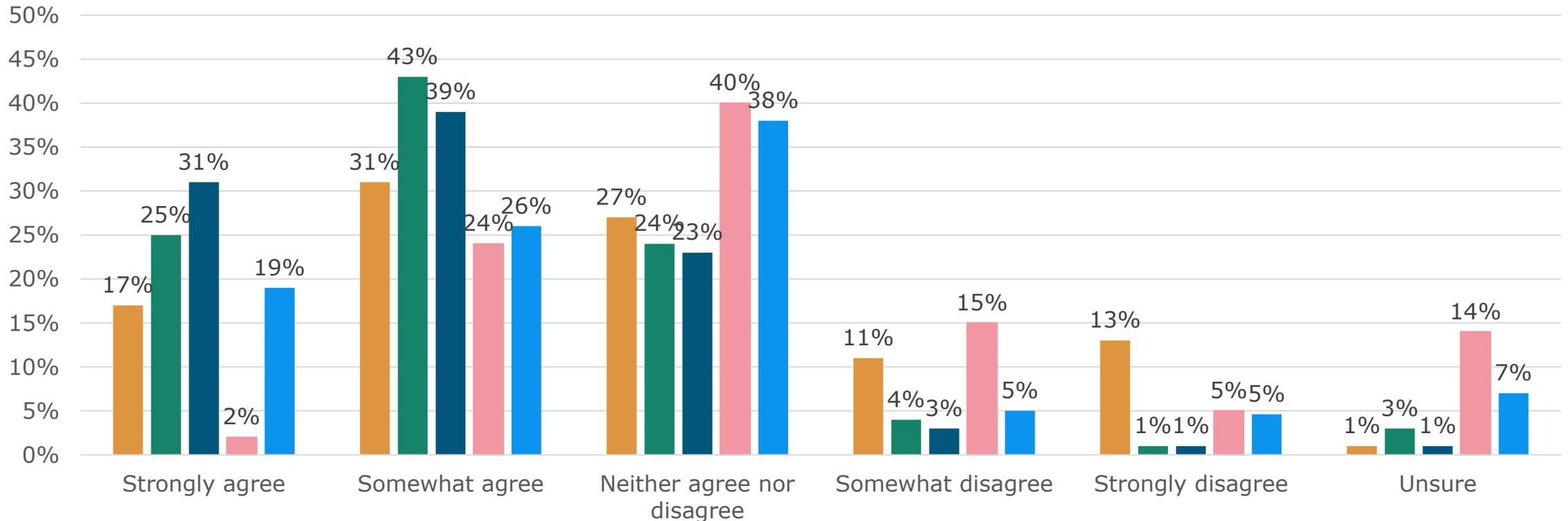


# Consumers and SMEs are most likely to agree that the SRA's activity has increased their confidence and trust

## The SRA's activity has increased my confidence and trust in legal services

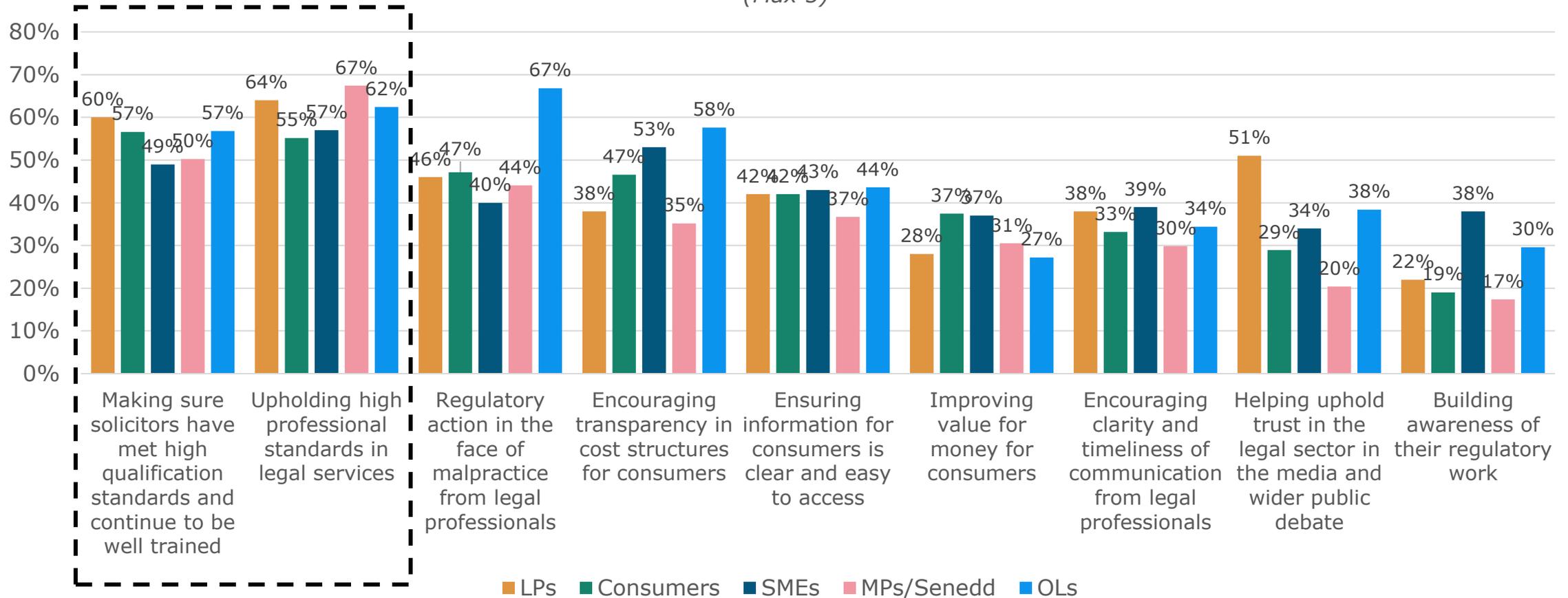
(only asked non-LP audiences who have some awareness of the SRA)

■ LPs ■ Consumers ■ SMEs ■ MPs / Senedd ■ OLs



# The SRA upholding high professional standards and qualifications and training are particularly important

Factors most important for the SRA to play a role in  
(Max 5)





# Thank you

cmcnaughton-nicholls@thinksinsight.com  
elauchlan@thinksinsight.com  
isabelleevans@thinksinsight.com  
apintilie@thinksinsight.com  
mkeating@thinksinsight.com  
rduthie@thinksinsight.com

Thinks Insight & Strategy  
West Wing  
Somerset House  
London  
WC2R 1LA  
United Kingdom

T: +44 (0)20 7845 5880  
[www.thinksinsight.com](http://www.thinksinsight.com)