Evaluation: Changes in the legal services market 2006/07 - 2014/15 - Annexes

An analysis of outcomes associated with the delivery of the regulatory objectives

July 2016

Contents

Annex 1: List of non LSB reports used in the Evaluation 3
Annex 2: Approach to analysis of regulators' data 12
Annex 3: Market segment summaries 16

Annex 1: List of non LSB reports used in the Evaluation

The list below shows the reports reviewed by the LSB for the Evaluation report, in addition to the findings of the LSB research reports.[1] These were mainly published between the end of 2012 and April 2016, since the 2012 Evaluation baseline report was completed. They are referenced throughout the main report. They are ordered by the type commissioning organisation (regulator, academic, etc) and by year (descending). These were all freely available online and the Evaluation only makes use of published research.

Figure A.1 List of reports

No	Title	Commissioning organisation	Year Published
1	Access to justice: can you invest in it?	Academic paper	2015
2	Paths to Justice, A past, present and future roadmap, Pleasence et al. 2013, UCL,	Academic paper	2014
3	Face to Face Legal Services and Their Alternatives: Global Lessons from the Digital Revolution Roger Smith and Alan Paterson	Academic paper	2013
4	Regulating Law Firm Ethics Management - An empirical Assessment of Innovation and Regulation of the Legal Profession in New South Wales (Parker, Gordon, Mark)	Academic paper	2010
5	Annual Regulatory Return Analysis - CLC 2015	Approved Regulator	2016
6	CLC: ABS leading the way on information technology, CLC, 2016,	Approved Regulator	2016
7	Quality of legal services for asylum seekers Research commissioned by the Solicitors Regulation Authority and Legal Ombudsman	Approved Regulator	2016
8	Bar Standards Board Diversity Report 2015	Approved Regulator	2015
9	2015 First Tier Complaints Handling survey, CILEX Regulation 2015	Approved Regulator	2015
10	BSB - Enforcement Statistical Report 2014/15	Approved Regulator	2015
11	Enforcement Statistical Report 2014/15, BSB	Approved Regulator	2015

[1] All LSB research reports can be found on our research web pages - https://research.legalservicesboard.org.uk/

12	Independence, Representation and Risk: An Empirical Exploration of the Management of Client Relationships by Large Law Firms	Approved Regulator	2015
13	Report on High Impact Supervision Returns October 2015, BSB	Approved Regulator	2015
14	SRA Risk Outlook 2015/16	Approved Regulator	2015
15	SRA-TLS. Practising certificate fees in 2015-16. Summary of results.	Approved Regulator	2015
16	The Notarial Profession of England & Wales - Diversity and Equality Data - 2014/15	Approved Regulator	2015
17	Barristers working lives 2013, Employment Research Ltd and Institute for Employment Studies, BSB	Approved Regulator	2014
18	Compensation Fund Review, Economic Insight, SRA	Approved Regulator	2014
19	Costs Lawyers: Diversity Evaluation 2014	Approved Regulator	2014
20	IPREG annual report 2014	Approved Regulator	2014
21	PCFs in 2014-15 Summary of results 08 07 2014 TLS SRA Corporate solutions	Approved Regulator	2014
22	Practising certificate fees in 2014-15. Summary of results.	Approved Regulator	2014
23	Qualitative research into ABS, ICF for SRA May 2014.	Approved Regulator	2014
24	Report of the Professional Conduct Panel, Disciplinary Tribunal, and Appeal Panel 2014, Annual Report 2014, CILEx Regulation	Approved Regulator	2014
25	Research on the role of in-house solicitors, Oxera, SRA	Approved Regulator	2014
26	Review of SRA Regulatory Management	Approved Regulator	2014
27	SRA Compensation Arrangements Review A snapshot of the current arrangements	Approved Regulator	2014
28	SRA Research on ABSs. Findings from surveys with ABSs and applicants that withdrew from the licensing process	Approved Regulator	2014

29	CLC Data Analysis 2013, Council for Licensed Conveyancers	Approved Regulator	2013
30	Bar Barometer - BSB and BC	Approved Regulator	2013
31	CLC 2013 Diversity Profile Report	Approved Regulator	2013
32	SRA - Measuring the impact of Outcomes Focused Regulation (OFR) on firms. Feb 2013	Approved Regulator	2013
33	SRA Conveyancing Thematic Study, SRA March 2013	Approved Regulator	2013
34	SRA. Measuring the impact of Outcomes focused regulation (OFR ie low-medium impact firms) on firms	Approved Regulator	2013
35	Barristers working lives 2011, Employment Research Ltd and Institute for Employment Studies, BSB	Approved Regulator	2012
36	IPREG annual report 2012	Approved Regulator	2012
37	Research on Consumers' Attitudes towards the Purchase of Legal Services: A research report for: Solicitors Regulation Authority 2010; and Consumer attitudes towards the purchase of legal services An overview of SRA research findings 2011	Approved Regulator	2011
38	Attitudes to regulation and compliance in legal services 2011, SRA	Approved Regulator	2011
39	IPREG annual report 2011	Approved Regulator	2011
40	Legal Ombudsman Stakeholder Survey - Full Report 2014	Legal Ombudsman	2015
41	Legal Service User Profiles - You Gov	Legal Ombudsman	2015
42	LEO Annual Report 13/14	Legal Ombudsman	2014
43	Models of ADR, Queen Margaret University	Legal Ombudsman	2014
44	Business Case for Good Complaints Handling	Legal Ombudsman	2013
45	Legal Ombudsman Stakeholder Survey - Full Report 2013	Legal Ombudsman	2013
46	LEO Annual Report 12/13	Legal Ombudsman	2013
47	Redress for "Legal Services". For LeO by Northumbria University School of Law	Legal Ombudsman	2013

48	Customer Satisfaction Surveys 2011-2012 for LEO	Legal Ombudsman	2012
49	LEO Annual Report 11/12	Legal Ombudsman	2012
50	YouGov for LeO, Part A: Consumer experience of complaint handling in the legal services market - first tier complaints	Legal Ombudsman	2012
51	LEO Annual Report 10/11	Legal Ombudsman	2011
52	Mapping potential consumer confusion in a changing legal market - report for the Legal Ombudsman	Legal Ombudsman	2011
53	OLC Annual Report 09/10	Legal Ombudsman	2010
54	Opening up data in legal services, LSCP 2016	LSCP	2016
55	Briefing note: how consumers choose legal services	LSCP	2015
56	Legal Services Consumer Panel Tracker Survey 2015, LSCP	LSCP	2015
57	Consumer Impact Report 2014	LSCP	2014
58	Quality in Legal Services, Vanillia Research	LSCP	2010
59	Insight into awareness and impact of the Bribery Act 2010 Among small and medium sized enterprises (SMEs), MoJ, BIS, 2015	Ministry of Justice	2015
60	Civil Court User Survey Findings from a postal survey of individual claimants and profiling of business claimants, TNS BMRB, Ministry of Justice, 2015	Ministry of Justice	2015
61	Civil Justice Statistics Quarterly, England and Wales, Ministry of Justice, December 2015	Ministry of Justice	2015
62	Criminal justice system statistics quarterly: September 2015	Ministry of Justice	2015
63	Enhanced Court Fees Impact Assessment, MoJ222, January 2015	Ministry of Justice	2015
64	Experimental Statistics: Legal Representation in the Crown Court, England and Wales, January to December 2014	Ministry of Justice	2015
65	Family Court Statistics Quarterly, April to June 2015, Ministry of Justice	Ministry of Justice	2015
66	Legal Aid Statistics in England and Wales	Ministry of Justice	2015
67	MoJ AS: MIAMs and mediation in private family law disputes	Ministry of Justice	2015

68	MoJ: Factors influencing international litigants' decision to bring commercial claims to the London based courts.	Ministry of Justice	2015
69	Monitoring the early impacts of the Legal Aid, Sentencing and Punishment of Offenders Act (2012) on onward immigration appeals	Ministry of Justice	2015
70	Personal Injury Discount Rate Research (Ipsos MORI for MoJ)	Ministry of Justice	2015
71	Public Confidence in the Criminal Justice System	Ministry of Justice	2015
72	Survey of Not for Profit Legal Advice Providers in England and Wales, Ipsos MORI	Ministry of Justice	2015
73	The Varying Paths to Justice: Mapping problem resolution routes for users and non users of the civil, administrative and family justice systems, Ipsos Mori Social Research Institute, Ministry of Justice, 2015	Ministry of Justice	2015
74	Civil Legal Advice mandatory gateway Overarching research summary	Ministry of Justice	2014
75	Litigants in person in private family law cases, Trinder et al, MoJ 2014	Ministry of Justice	2014
76	MoJ, AS: Public experiences of and attitudes towards the family justice system	Ministry of Justice	2014
77	English and Welsh Civil and Social Justice Panel Survey: Wave 2, Balmer 2013,	Ministry of Justice	2013
78	MoJ, AS: Public attitudes to civil and family court fees	Ministry of Justice	2013
79	The strengths and skills of the Judiciary in the Magistrates' Courts	Ministry of Justice	2011
80	Lord Carters Review of Legal Aid Procurement 2006,	Ministry of Justice	2006
81	Analaysis of external and corporate investment in UK law firms: sustainable momentum established, Arden Partners 2016	Other	2016
82	Civil Courts Structure Review: Interim Report by Lord Justice Briggs	Other	2016
83	Ipsos MORI Veracity Index 2015: Trust in Professions	Other	2016
84	The educational backgrounds of the UK professional elite, 2016, The Sutton Trust	Other	2016
85	PWC 2015 Annual law firms' survey, PWC,	Other	2015

86	2015 Financial Benchmarking Report - Law Firms (NatWest)	Other	2015
87	A better deal: boosting competition to bring down bills for families and firms, HM Treasury, November 2015,	Other	2015
88	A Perspective on the Legal Market, NatWest November 2015, James Tsolakis	Other	2015
89	ABI UK Insurance Key Facts	Other	2015
90	Advice trends 2011-2015, A four year snapshot of client statistics of the Citizens Advice service in England and Wales, Citizens Advice, 2015	Other	2015
91	Benchmarking survey 2015 - Crowe Clark Whitehill	Other	2015
92	Complaints against solicitors and other lawyers, House of Commons library	Other	2015
93	Crime Survey for England and Wales	Other	2015
94	Digital Delivery of Legal Services to people on low incomes	Other	2015
95	Doing business, World Bank 2015	Other	2015
96	Employment tribunal fees. House of Commons Library Briefing Paper No. 7081	Other	2015
97	House of Commons Briefing Paper Number 7081, 15 September 2015 Employment Tribunals Fees	Other	2015
98	How people understand and use the law, Pleasence, Balmer, and Denvir, TLEF 2015	Other	2015
99	Impact of changes to civil legal aid under Part 1 of the Legal Aid, Sentencing and Punishment of Offenders Act 2012 House of Commons Select Committee	Other	2015
100	Judicial Review: Government reforms in the 2010-15 Parliament, House of Commons Library	Other	2015
101	Key Facts and Trends in the Accountants Profession, Financial Reporting Council June 2015	Other	2015
102	Occupational Licensing: A framework for policymakers. The White House, Washington.	Other	2015
103	Public Opinion in the European Union , Standard Eurobarometer 83 - Spring 2015	Other	2015

104	Statistical First Release, Schools, pupils and their characteristics: January 2015, Department for Education,	Other	2015
105	Structured Mayhem. Personal experiences of the Crown Court	Other	2015
106	TheCityUK - UK Legal Services 2015	Other	2015
107	UK Legal Market Trends, May 2015	Other	2015
108	UK Legal Services 2015 - City UK	other	2015
109	Unjust Kingdom	Other	2015
110	World Justice Project Rule of Law Index 2015	Other	2015
111	2014 UK Judicial Attitude Survey	Other	2014
112	2014 Financial Benchmarking Report - Law Firms (NatWest)	Other	2014
113	A perspective on the legal market - RBS	Other	2014
114	Benchmarking survey 2014 - Crowe Clark Whitehill	Other	2014
115	CAB Advice Trends 2014/15 Q2	Other	2014
116	EC The Economic Impact of Professional services Liberalisation	Other	2014
117	Independent criminal advocacy in England and Wales, Review by Sir Bill Jeffrey, 2014	Other	2014
118	Innovation in Law report 2014	Other	2014
119	Innovation in the City - Legal Futures and Thomson Reuters	Other	2014
120	Key Challenges facing the UK Legal Market, Hodgart Associates, 2014	Other	2014
121	NAO - Implementing legal aid reforms	Other	2014
122	Public Perceptions of Standards in Public Life in the UK and Europe, 2014	Other	2014
123	Unbundling a market - The appetite for new legal services models - Global survey results - May 2014 Allen & Overy	Other	2014
124	Waiting for Justice: how victims of crime are waiting longer than ever for criminal trials, Victim Support	Other	2014

125	Economic Research into Regulatory Restrictions in the Legal Profession 2013, OfT	Other	2013
126	2013 Financial Benchmarking Report - Law Firms (NatWest)	Other	2013
127	Barriers to Application to Judicial Appointment - JAC	Other	2013
128	Benchmarking survey 2013 - Crowe Clark Whitehill	Other	2013
129	Dramatic drop in legal aid eligibility, ASA	Other	2013
130	Guidelines for market investigations: Their role, procedures, assessment and remedies, Competition Commission, CC3 (Revised) April 2013 - approved by the CMA Board in January 2014 in CMA3 (revised September 2015	Other	2013
131	Mr Justice Foskett, Chair of the Costs Committee of the Civil Justice Council, Keynote Address, The Motor Accidents Solicitors Society, 25 October 2013	Other	2013
132	OECD. What makes civil justice effective?	Other	2013
133	OFT Economic research into the regulatory restrictions in the legal profession (Ch 7-9)	Other	2013
134	The Economics of Civil Justice	Other	2013
135	The Economics of Civil Justice: New Cross-country Data and Empirics, OECD	Other	2013
136	Fair Access to Professional Careers A progress report by the Independent Reviewer on Social Mobility and Child Poverty, May 2012,	Other	2012
137	Benchmarking survey 2012 - Crowe Clark Whitehill	Other	2012
138	Report of the 2006-9 English and Welsh Civil and Social Justice Survey, Pleasence at al, Legal Services Commission, 2010	Other	2010
139	Social Mobility and the Professions, Centre for Market and Public Organisation, University of Bristol	Other	2009
140	NESTA 2009 Innovation. Part 6: Legal services.	Other	2009
141	The Consumer Markets Scoreboard 2nd edition	Other	2009
142	Unleashing Aspiration: The Final Report of the Panel on Fair Access to the Professions, 2009,	Other	2009
143	NESTA 2007 Hidden innovation. Appendix D: Civil legal aid services in E&W. Centralised efforts at innovation to	Other	2007

	reduce costs and improve access in a conservative sector with alternative suppliers emerging		
144	Annual firm survey 2014-15: Snapshot January 2016	Representative Body	2016
145	Categories of work undertaken by solicitors, Law Society 2015,	Representative Body	2015
146	Enhanced court fees - the Law Society response 2 March 2015	Representative Body	2015
147	PII renewal for the 2014-15 indemnity year - Law Society	Representative Body	2015
148	TLS: Report into the global competitiveness of the solicitor qualification	Representative Body	2015
149	Bar Council: LASPO one year on	Representative Body	2014
150	Forecasts of legal services sector real turnover and net exports.	Representative Body	2014
151	Law Firms survey 2014	Representative Body	2014
152	PII renewal for the 2013-14 indemnity year - Law Society	Representative Body	2014
153	PII renewal for the 2012-13 indemnity year - Law Society	Representative Body	2013
154	The Legal Services Industry Part 1 - An overview, The Law Society 2013	Representative Body	2013
155	Obstacles and barriers to the career development of women, Law Society 2010	Representative Body	2010

Annex 2: Approach to analysis of regulators' data

This section lists the assumption we have made in analysing regulators' data. This data is not survey based, and covers the entire population of those who are regulated to provide legal services by a specific regulator. Assumptions made for interpreting survey results are included in the narrative in the main report, as necessary.

SRA entity data

This analysis is possible because of the comprehensive management data collected by the SRA. This includes data on turnover[2] and structure of each regulated entity. This data has been provided to the LSB anonymously so that no individual firm can be identified. This covers all SRA regulated entities in existence at any point between the 2010/11 to 2014/15 period.

The data reported to the SRA is based on the latest full year's information that is available to the firm. This has the inevitable effect of introducing a time lag. While all the entities reported turnover from the 2014/15 accounting year, entities report performance in the past year as opposed to current activity. This should be noted when interpreting the results of this analysis.

For this analysis, our definition of a firm is one with a head office recorded as a law practice that has positive turnover in any of the five years. Others may use different definitions.

For this analysis, we exclude all organisations in SRA records that are not recorded as a 'Law practice'. That means we exclude organisations that offered legal services in house, or where solicitors are employed at regulatory bodies, court services and others. Of the 21,948 records in the data set, 26% were organisations classified as 'Commerce and Industry', with a further 8% of records relating to solicitors working in an organisation other than 'Law Practices'. In interpreting our analysis, this means some firms classified as new entrants may be organisations using an ABS license to use in house lawyers to offer legal services externally.

The data set from the SRA contained anonymous records of individual law practices' renewal data for the 2010/11-2014/15 period. This gave information for 14,671 SRA regulated law practices who were in operation at some point over the 2010/11-2014/15 period. To make the calculations necessary for our analysis, we have applied certain conditions and made a number of assumptions as follows:

Conditions

a. The firm must be a law practice at any point in the period of analysis.
b. They must report turnover at any point in the period of analysis.
c. They must provide a breakdown of the categories of work undertaken at any point in the period of analysis.

Assumptions

a. Where a firm did not report turnover for one year of operation, we have assumed a turnover value of the value of the midpoint between the two adjacent years. If they are missing more than two years data during the period operation they are excluded.
b. Where the percentage breakdown of turnover was not provided in one year of operation, we have assumed a percentage breakdown value of

[2] For a definition see- http://www.sra.org.uk/sra/legal-services-act/lsa-glossary.page

the midpoint between the two adjacent years. If they are missing more than two years data during the period operation they are excluded.

c. Where the percentage breakdown of turnover provided was less or more than 100%, we have reweighted the breakdown to 100%.
d. Where a firm states that it is an LDP or an ABS in one year, we have assumed that it is a LDP or ABS in subsequent years when this data has not been provided.

As a consequence of missing data and our limited assumptions, each year between 10-12% of records are missing. These conditions and assumptions and their impacts on the number of firms included in this analysis are shown in the table below. As a consequence of these conditions and assumptions there were 12,811 usable records over the five year period. This was out of a total of 14,667 records that were recorded as Law Practices at any point over the 2010/11-2014/15 period.

Figure A.2. LSB analysis of SRA data assumptions made

	2010/11	2011/12	2012/13	2013/14	2014/15
Conditions:					
1. They are a Law Practice	11,037	11,293	10,938	10,557	10,367
2. & report turnover	9,853	9,480	9,357	9,325	9,233
3. & a %age category breakdown	9,460	9,013	9,178	9,068	9,015
Changes to cash Turnover					
Old	**£18.85bn**	**£19.43bn**	**£19.57bn**	**£20.47b**	**£21.42b**
New	**£18.56bn**	**£19.03bn**	**£19.35bn**	**£20.31b**	**£21.28b**
Difference	**-£0.3bn**	**-£0.4bn**	**-£0.2bn**	**-£0.2bn**	**-£0.1bn**
4. & records are continuous for all 'live' years	9,002	8,857	8,837	8,672	8,613
%age of records with full data	**82%**	**78%**	**81%**	**82%**	**83%**
Assumptions					
Assume where no category breakdown this was the same as previous or future years or a midpoint between the two years					
New	9,817	9,453	9,347	9,236	9,017
%age of records with full and derived data	**89%**	**84%**	**85%**	**87%**	**87%**
Further assume that where turnover is missing, the assumed turnover figure is the midpoint between previous and future years, or if it is missing in first year the assumed turnover figure is the same as the second year, or if it is missing in fourth year the assumed turnover figure is the same as the fifth year.					
New	9,958	10,163	9,777	9,433	9,075
%age of records with full and derived data	**90%**	**90%**	**89%**	**89%**	**88%**
Change to Cash Turnover					
Old	**£18.85bn**	**£19.43bn**	**£19.57bn**	**£20.47b**	**£21.42b**

New	**£18.91bn**	**£19.99bn**	**£20.03bn**	**£20.67b**	**£21.42b**
Difference to turnover pre assumptions	**£0.06bn**	**£0.55bn**	**£0.46bn**	**£0.20bn**	**£0.00bn**

In reviewing the outputs of this analysis, we must also consider the impact of these assumptions on our conclusions. At the market level this approach while ensuring the greatest number of firms are included, means that we might overstate the level of turnover by a small margin – between 0-3%. When we look at changes in individual firms' behaviour these assumptions – taking a midpoint to fill a data gap - are likely to mean that we understate the level of change impacting on some firms over the past five years. The only way to improve upon this in future is to improve data recording generally.

When considering entry and exit we look at a number of aspects. Each year some firms leave the market, and move to other markets, some firms fail and shut down completely, while a group of firms remain in the market. How these incumbents behave will affect market concentration and therefore to some degree competitiveness. At the same time, a group of new firms enter the market. These can be firms moving from other markets or completely new firms. Finally, there is another group of firms in the market who left in the previous year but have returned to offer services again. The sum of these movements adds up to the churn in each segment.

Entry and exit figures will be over-stated in our analysis. Because of the way data on changes in firm structure is recorded, this figure will capture a firm changing partnership status, from sole practitioner to full partnership for example. In this analysis, numbers of new entrants should be considered to be a maximum, with the number of genuine new entrants being lower, though this remains unknown. This is also true for firms who closed by the start of the year. In 2013 the SRA estimated that the true values would be significantly less. They estimated that from January 2013 to July 2013, of the approximate 400 'firm closures', around 80 ceased practicing. This was approximately 20% of the total figure in the LSB analysis. At that time the SRA were confident that this could be applied to 2012/13 but not to previous years. In May 2015 the SRA published data for the breakdown of firm closures by reason for 2014/15[3] which indicates that around half of closures (exits) were as a result of a firm ceasing to practice, and the other half were due to mergers or change of status

Figure A.3. SRA Data for breakdown of firm closures by reason May 2014 to April 2015

Date(s)	Ceased Practising	Merged/Amalgamated	Change of status	Split	Other	Total
May 2014 to April 2015	404 (50%)	173 (21%)	205 (25%)	- (0%)	34 (4%)	816

In making comparisons with other industries using UK wide figures, ONS advise that a change in legal status alone would not be enough to trigger a record of a firm closing on the

3 See http://www.sra.org.uk/sra/how-we-work/reports/data/firm_closure_breakdown.page

national business register[4] affecting 25% of the incidence reported in 2014/15. However a merger would result in two deaths and the birth of the new (merged) entity in a new enterprise. Therefore it is reasonable to conclude that the SRA figures will potentially overstate the level of entry and exit compared with national data on other business sectors.

Chartered Institute of Legal Executive Data

CILEx shares data on individual fellows on a frequent basis. We mapped the CILEx categories to different market segments. This is shown in Figure A.3 below.

Figure A.4. CILEx category

Oxera category	CILEx Category	2012		2013		2014		2015	
Other	Civil litigation - Debt recovery	510	7%	517	7%	535	8%	551	8%
Other	Civil litigation - General litigation	1072	14%	1062	15%	1080	16%	1124	17%
Other	Public law work - Government	69	1%	79	1%	73	1%	79	1%
Other	Public law work - Local authority	523	7%	537	8%	539	8%	539	8%
Other		2174	29%	2195	32%	2227	33%	2293	35%
Other business affairs	Corporate - Commercial	319	4%	343	5%	370	6%	404	6%
Other business affairs	Corporate - Company	162	2%	176	3%	197	3%	199	3%
Other business affairs		481	6%	519	8%	567	8%	603	9%
Crime-prosecution	CPS - Associate Prosecutor	24	0%	28	0%	18	0%	15	0%
Crime-prosecution	Criminal litigation - Prosecution	135	2%	146	2%	144	2%	137	2%
Crime-prosecution		159	2%	174	3%	162	2%	152	2%
Non legal work	Legal practice - Costs or accounts	147	2%	148	2%	145	2%	161	2%
Non legal work	Legal practice - Practice management	142	2%	155	2%	163	2%	177	3%
Non legal work	Non legal - Non legal work	137	2%	145	2%	142	2%	161	2%
Non legal work		426	6%	448	6%	450	7%	499	8%
Employment	Civil litigation - Employment	237	3%	246	4%	258	4%	267	4%
Property, construction and planning	Civil litigation - Housing	233	3%	234	3%	235	4%	253	4%
Injury	Civil litigation - Personal injury	1315	17%	1335	19%	1346	20%	1408	21%
Conveyancing	Conveyancing - Conveyancing	2105	28%	2064	30%	2061	31%	2068	31%
Crime-defence	Criminal litigation - Defence	347	5%	317	5%	290	4%	277	4%
Family	Family law - Family	919	12%	885	13%	860	13%	818	12%
Corporate structuring and finance	Private client - Finance	84	1%	98	1%	97	1%	100	2%
Wills, trusts and probate	Private client - Probate & wills	914	12%	910	13%	913	14%	921	14%
Immigration and nationality	Public law work - Immigration	48	1%	46	1%	48	1%	54	1%
Welfare and benefits	Public law work - Welfare benefits	33	0%	36	1%	38	1%	47	1%
	Total Fellows	7552	100%	6900	100%	6711	100%	6645	100%

4See http://www.ons.gov.uk/ons/dcp171778_387261.pdf. On change of status ONS advise that the process is driven by HMRC Customs and VAT registration. In the past it was a requirement for the new legal entity to re-register for VAT, but increasingly, this is not the case and the VAT registration is being recycled. HMRC notify ONS of any change in status to existing VATs, and the inevitable new name is applied to units within the existing enterprise. Where a business changes status and re-registers its VAT, three things would be considered; the location, the activity and the name. If any two of the three criteria change, then there is no continuity and the site/sites would be killed in the old, and new sites raised in the new enterprise- a birth and a death. Otherwise, it is essentially the same business and continuity is maintained.

Annex 3: Market segment summaries

This section provides a summary of key information on each market segment, and trends over time. This uses the Oxera market segmentation framework and matches different data sets and survey results to provide insight on changes within the different market segments. This provides indicative evidence of trends in each segment, based on the best evidence we can find.

These segments are:

- Civil liberties
- Consumer problems
- Conveyancing - commercial
- Conveyancing - residential
- Corporate structuring, finance, and taxation, and Other business affairs
- Crime—prosecution & Crime—defence
- Employment
- Family
- Immigration and nationality
- Injury
- Intellectual property rights
- Other
- Property, construction and planning
- Welfare and benefits
- Wills, trusts and probate

The following tables summarise each segment in turn for the 2010/11 to 2014/15 period.

Civil Liberties[5]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 16%; Handled alone – 31%; Seek advice – 49% 2012: Take no action – 32%; Handled alone – 42%; Seek advice – 22% 2015: Take no action – 34%; Handled alone – 41%; Seek advice – 25%				
Small businesses	N/A				
Large businesses	N/A				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Trade Union – 19%; Citizens Advice – 14%; Council advice services – 10%; Barristers – 7%; Other – 14%; Solicitors – 29%. 2012-2015: Citizens Advice – 15%; Unreserved provider – 40%, Reserved provider – 5%, Solicitor – 39%.				
Small businesses	N/A				
Large businesses	N/A				
Demand proxy indicators:	None identified				
Individual consumers who shopped around:	Unknown				

[5] In the Oxera Segmentation Framework Civil liberties covers contentious work in relation to Human rights, Actions against the police, Discrimination (excluding employment), and Other rights including specialist areas such as rights to life. This was matched to the Discrimination, Civil Liberties, and Human Rights SRA category. Individual consumer legal needs were matched to the Discrimination and unfair treatment by police categories used in the 2006-2009 CSJS. Individual consumer legal needs in actions against the police and discrimination problem types used in the 2012 survey were matched to this category. The problem types of Discrimination (the unjust or prejudicial treatment of different categories of people, especially on the grounds of race, age, or sex) and the Been treated badly by the police (police misconduct) from the 2016 online survey of individuals responses to legal problems, were matched to this market segment. This was matched to the Civil practice area reported in the 2011 and 2013 Barristers surveys. This was matched to the Discrimination/ Civil liberties/Human rights in the 2015 Innovation survey.

Complaints accepted by LeO	0	0	0	0	0
Supply:					
Legal Executives	None				
Estimated self-employed barristers in this market segment		6%	-	7%	-
Total solicitors turnover - %age of total:	£42m (0.2%)	£22m (0.1%)	£22m (0.1%)	£20m (0.1%)	£21m (0.1%)
Total solicitors firms- %age of total:	177 (1.8%)	145 (1.4%)	143 (1.5%)	128 (1.4%)	115 (1.3%)
Market share of largest 10 SRA firms	82%	73%	69%	70%	77%
Number of the top 10 firms still in the top 10 from previous year:	10	5 (5)	6 (4)	6 (4)	5 (5)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		33% (39%)	36% (23%)	37% (31%)	27% (54%)
New entrants – new to segment		27% (37%)	32% (22%)	31% (26%)	25% (40%)
New entrants – new to market		6% (2%)	4% (1%)	6% (5%)	2% (14%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Unknown - only 7 respondents to the 2015 Innovation study reported Civil Liberties as their main area of work.				

Consumer Problems[6]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 7%; Handled alone – 53%; Seek advice – 39% 2012: Take no action – 24%; Handled alone – 59%; Seek advice – 15% 2015: Take no action – 8%; Handled alone – 73%; Seek advice – 18%				
Small businesses	2013: Take no action – 6%; Handled alone – 74%; Seek advice – 19% 2015: Take no action – 8%; Handled alone – 79%; Seek advice – 13%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Trading Standards – 26%; Citizens Advice – 21%; Council advice services – 8%; Other advice agencies - 4%; Trade Union – 2%; Other – 16%. 2012-2015: Citizens Advice – 31%; Unreserved provider – 60%, Reserved provider – 2%, Solicitor – 7%.				
Small businesses	2013: Accountant – 19%; Debt collection/ recovery service – 17%; Barrister – 8%; Other legal advice service – 8%. Solicitors were used by 54% of advice seekers in this segment.				
Large businesses	Unknown				

[6] In the Oxera Segmentation Framework Consumer Problems covers contentious work in relation to Sale of goods and services, Hire purchase agreements, Time shares, and Motor vehicles. This was matched to the Consumer SRA category. Individual consumer legal needs were matched to the Consumer– faulty services and Consumer—faulty goods categories used in the 2006-2009 CSJS. Individual consumer legal needs in the 'Had a consumer problem (eg faulty goods from a store, hire purchase etc)' problem type used in the 2012 survey and the Had a consumer problem (e.g. faulty goods from a store, hire purchase agreements etc.) from the 2016 online survey of individuals responses to legal problems, were matched to this market segment. LSCP tracker survey categories of Problems with consumer services or goods and Debt or hire purchase problems were matched to this segment. This was matched to the GOODS OR SERVICES PROVIDED TO YOUR CUSTOMERS Not as described, Late delivery, Unacceptably late or non-/partial-payment, Distance selling consumer rights, Other contract problems or disputes, GOODS OR SERVICES PURCHASED BY YOUR BUSINESS Not as described, Late delivery, Unacceptably late or non-/partial-payment, Other contract problems or disputes, Supplier insolvent Small Business legal needs categories. This was matched to the Consumer problems category in the 2015 Innovation survey.

Demand proxy indicators:	None identified				
Individual consumers who shopped around:	12%	18%	24%	29%	20%
Complaints accepted by LeO	-	-	-	<1%	<1%
Supply:					
Legal Executives	Unknown				
Estimated self-employed barristers in this market segment		Unknown			
Total solicitors turnover **-** %age of total:		£17m (0.1%)	£19m (0.1%)	£15m (0.1%)	£24m (0.1%)
Total solicitors firms - %age of total:		348 (3.4%)	310 (3.2%)	302 (3.2%)	263 (2.9%)
Market share: (%age, £)					
Market share of largest 10 SRA firms		61%	55%	60%	81%
Number of the top 10 firms still in the top 10 from previous year:		10	3 (7)	4 (6)	6 (4)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants			32% (65%)	38% (56%)	30% (66%)
New entrants – new to segment			28% (53%)	35% (53%)	26% (65%)
New entrants – new to market			4% (12%)	3% (3%)	4% (1%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Unknown - only 5 respondents to the 2015 Innovation study reported Consumer Problems as their main area of work.				

Conveyancing Residential[7]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2012: Take no action – 17%; Handled alone – 24%; Seek advice – 52% 2015: Take no action – 16%; Handled alone – 39%; Seek advice – 45%				
Small businesses	N/A				
Large businesses	N/A				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Licensed Conveyancers – 12%; Financial Adviser -6%; Bank or Building Society – 4%; Other – 18%; Solicitor – 60% 2012-2015: Citizens Advice – 7%; Unreserved provider – 26%, Reserved provider – 12%, Solicitor – 55%.				
Small businesses	N/A				
Large businesses	N/A				
Demand proxy indicators: HMRC residential property transactions	792K	833K (5% ↑ 2010/11)	838K (1% ↑ 2011/12)	1,024K (22% ↑ 2012/13)	1,086K (6% ↑ 2013/14)
BoE residential remortgage approvals	362K	375K (4% ↑ 2010/11)	332K (12% ↓ 2011/12)	411K (24% ↑ 2012/13)	381K (7% ↓ 2013/14)

[7] In the Oxera Segmentation Framework this covers conveyancing for residential properties. This was matched to the conveyancing -residential SRA category. Individual consumer legal needs in the 'Bought/sold a house' and 'Re Mortgaged current property/Transfer of equity' problem types used in the 2012 survey and the 2016 survey were matched to this category. LSCP tracker survey category of Conveyancing (e.g. legal working involving buying, selling or transferring property) was matched to this segment. The conveyancing- conveyancing category of work for Chartered Legal Executives was matched to this category. This was matched to the Property/Conveyancing – residential category in the 2015 Innovation survey.

Individual consumers who shopped around:	29%	33%	27%	28%	33%
Complaints accepted by LeO	20%	15%	15%	20%	23%
Supply:					
Notaries	-	-	-	3% (24) 64% private clients	
Number of licensed conveyancers	1,115	1,071	1,177	1,222	1,262
Total licensed conveyancer entities	215 (July 2011)	212 (July 2012)	216 (July 2013)	217 (September 2014)	214 (September 2015) Typical workload 88% residential conveyancing.
Chartered Legal Executives		28% (2,105)	30% (2,064)	31% (2,061)	31% (2,068)
Chartered Legal Executive conveyancing practitioner - from November 2014					0.3% (7)
Estimated self-employed barristers in this market segment		Unknown			
Total solicitors turnover - %age of total:	£1.07bn (5.3 %)	£1.11bn (5.3%)	£1.10bn (5.3%)	£1.14bn (5.4%)	£1.32bn (6.2%)
Total solicitors firms- %age of total:	58% (5,743)	54% (5,509)	54% (5,254)	53% (5,025)	54% (4,864)
Market share of largest 10 SRA firms	5%	6%	5%	6%	6%

Number of the top 10 firms still in the top 10 from previous year:	10	4 (6)	5 (5)	6 (4)	7 (3)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		9% (8%)	7% (6%)	7% (6%)	6% (4%)
New entrants – new to segment		3% (1%)	3% (2%)	3% (1%)	3% (1%)
New entrants – new to market		6% (7%)	4% (4%)	4% (5%)	3% (3%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services	24%			
	Significant changes to the way services are delivered	32%			
	Currently do or are planning to offer services online	17%			
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc	49%			
	Used social media 2014/15	38%			

Conveyancing - Commercial[8]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	N/A				
Small businesses	2012: Take no action – 8%; Handled alone – 46%; Seek advice – 46% 2014: Take no action – 13%; Handled alone – 13%; Seek advice – 75%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	N/A				
Small businesses	Accountant – 17%; Barrister – 17%; Specialist support services – 17%; Solicitors were used by 100% of advice seekers in this segment				
Large businesses	Unknown				
Demand proxy indicators: HMRC non-residential property transactions	88K	88K (0% 2010/11)	88K (0% 2011/12)	95K (8% ↑ 2012/13)	102K (7% ↑ 2013/14)
Individual consumers who shopped around:	N/A				
Complaints accepted by LeO	-	2%	2%	2%	2%
Supply					

[8] In the Oxera Segmentation Framework this covers conveyancing for commercial properties. This was matched to the conveyancing - commercial SRA category, and the Owned- Conveyancing Small Business legal needs category. This was matched to the Property/Conveyancing – commercial category in the 2015 Innovation survey.

Notaries	-	-	-	3% (24) 36% commercial clients	
Number of licensed conveyancers	1,115	1,071	1,177	1,222	1,262
Total licensed conveyancer entities	215 (July 2011)	212 (July 2012)	216 (July 2013)	217 (September 2014)	214 (September 2015) Typical workload 5% commercial conveyancing.
Chartered Legal Executives		28% (2,105)	30% (2,064)	31% (2,061)	31% (2,068)
Chartered Legal Executive conveyancing practitioner - from November 2014					0.3% (7)
Estimated self-employed barristers in this market segment	Unknown				
Total solicitors turnover - %age of total:	£1.52bn (7.5%)	£1.55bn (7.4%)	£1.52bn (7.4%)	£1.55bn (7.4%)	£1.64bn (7.6%)
Total solicitors firms- %age of total:	51% (5,112)	49% (5,003)	49% (4,793)	49% (4,590)	49% (4,444)
Market share of largest 10 SRA firms	21%	21%	22%	22%	22%
Number of the top 10 firms still in the top 10 from previous year:	10	9 (1)	7 (3)	9 (1)	9 (1)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		12% (7%)	10% (5%)	9% (2%)	8% (2%)
New entrants – new to segment		5% (3%)	6% (2%)	5% (1%)	5% (1%)

New entrants – new to market		7% (4%)	4% (3%)	4% (1%)	3% (1%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services			30%	
	Significant changes to the way services are delivered			35%	
	Currently do or are planning to offer services online			21%	
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc			65%	
	Used social media			56%	

Corporate structuring & finance[9]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	N/A				
Small businesses	2012: Take no action – 9%; Handled alone – 59%; Seek advice – 31% 2014: Take no action – 9%; Handled alone – 59%; Seek advice – 32%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	N/A				
Small businesses	**Small businesses –** Accountant – 45%; Barrister – 10%; Trade Body 10%; HR/Employment service – 6%; Debt collection/recovery service – 6%; Business Link – 6% Solicitors were used by 32% of advice seekers in this segment				
Large businesses	Unknown				

[9]In the Oxera Segmentation Framework this covers contentious and Non-contentious work in Indirect taxation, Property taxation, International taxation, Mergers and acquisitions, Joint ventures, Public takeovers, Privatisations, Issuance of securities, Corporate insolvency, Infringement of contracts, Competition and regulatory issues, Environmental, Procurement, Licensing, and Business registration. This was matched to the Commercial Corporate Listed Companies, Commercial Corporate Non Listed Companies, and Bankruptcy Insolvency SRA categories. This was matched to the Joint ventures, Sale of business (in part/whole), Take-over of another business, Merger, Partnership/shareholder disputes, Break-up of partnership, Change of legal status, International taxation, Failure to register/report changes when required (eg VAT registration, registration as a sole trader), Failure to maintain appropriate records (for tax purposes), Errors in your business tax return, Liability for tax/amount of tax owed, Goods or services purchased by your business: Not as described, Late delivery, Unacceptably late or non-/partial-payment, Other contract problems or disputes, Supplier insolvent, Fraudulent or wrongful trading (concerning insolvency), Unfair operation of a public tender, legal regulatory issues relating to international trading, Mandatory licenses/permits/accreditation, Product safety, Other health and safety, Data protection, Import/export regulation, Mandatory insurance, Filing/content of annual company accounts, Need for/outcome of audit, Other government regulation, Advertising standards, Technicalities of business start up, Incorrect information held by a credit reporting agency leading to the refusal of credit, and Mismanagement of business money/investments by financial service Small Business legal needs categories. This was matched to the Admiralty or shipping, Commercial, Chancery, Revenue practice areas reported in the 2011 and 2013 Barrister surveys. This was matched to the Commercial/Corporate work for listed companies and the Commercial/Corporate work for non-listed companies' categories in the 2015 Innovation survey.

Demand proxy indicators: UK Business Births (ONS)	215K	241K (12% ↑ 2010/11)	248K (3% ↑ 2011/12)	320K (29% ↑ 2012/13)	
UK Business Deaths (ONS)	228K	210K (8% ↓ 2010/11)	231K (10% ↑ 2011/12)	218K (6% ↓ 2012/13)	
Cross border & UK National Mergers, Acquisitions, and Disposals volume	867	1,045 (21% ↑ 2010/11)	616 (41% ↓ 2011/12)	463 (25% ↓ 2012/13)	430 (8% ↓ 2013/14)
New Companies incorporated (Companies House)	376K	427K (14% ↑ 2010/11)	452K (6% ↑ 2011/12)	499K (11% ↑ 2012/13)	
Insolvency petitions - County Court (MoJ)	65k	49k (25% ↓ 2010/11)	38k (23% ↓ 2011/12)	31k (20% ↓ 2012/13)	25k (17% ↓ 2013/14)
Chancery Division - proceedings started (MoJ)	33k	35k (6% ↑ 2010/11)	29k (18% ↓ 2011/12)	29k (1% ↓ 2012/13)	
Commercial Court - Claims issued (MoJ)	1.1k	1.3k (26% ↑ 2010/11)	1.1k (14% ↓ 2011/12)	1.2k (5% ↑ 2012/13)	
Complaints accepted by LeO	-	-	-	1%	1%
Supply					
Chartered Legal Executives		1%	2%	2%	2%
Estimated self-employed barristers in this market segment:		16%	-	18%	-

Total solicitors firms- %age of total:	32% (3,195)	32% (3,218)	32% (3,110)	32% (3,009)	32% (2,882)
Market share of largest 10 SRA firms	38%	37%	38%	38%	36%
Number of the top 10 firms still in the top 10 from previous year:	10	9 (1)	8 (2)	9 (1)	9 (1)
All new entrants		19% (3%)	15% (3%)	16% (2%)	13% (2%)
New entrants – new to segment		10% (1%)	11% (1%)	11% (1%)	9% (1%)
New entrants – new to market		9% (2%)	4% (2%)	5% (1%)	4% (1%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services			29%	
	Significant changes to the way services are delivered			24%	
	Currently do or are planning to offer services online			19%	
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc			63%	
	Used social media			55%	

Other business affairs[10]	2010/11	2011/12	2012/13	2013/14	2014/15
Total solicitors turnover - %age of total:	£0.40bn (2.0%)	£0.38bn (1.8%)	£0.35bn (1.7%)	£0.36bn (1.7%)	£0.35bn (1.6%)
Total solicitors firms- %age of total:	5% (534)	6% (590)	6% (578)	6% (555)	6% (536)
Market share of largest 10 SRA firms	48%	44%	39%	41%	43%

[10] This was matched to the Bankruptcy/Insolvency category in the 2015 Innovation survey.

Number of the top 10 firms still in the top 10 from previous year:	10	7 (3)	6 (4)	8 (2)	8 (2)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		32% (9%)	27% (13%)	25% (6%)	22% (5%)
New entrants – new to segment		25% (7%)	23% (11%)	20% (5%)	18% (4%)
New entrants – new to market		7% (2%)	4% (2%)	5% (1%)	4% (1%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Unknown - only 10 respondents to the 2015 Innovation study reported Other Business Affairs as their main area of work.				

Crime – prosecution and defence[11]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2012: Take no action – 9%; Handled alone – 29%; Seek advice – 57% 2015: Take no action – 14%; Handled alone – 41%; Seek advice – 46%				
Small businesses	Unknown				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Barristers – 3%; Law Centre – 3%; Solicitors – 77%. 2012-2015: Citizens Advice – 3%; Unreserved provider – 21%, Reserved provider – 12%, Solicitor – 64%.				
Small businesses	Unknown				
Large businesses	Unknown				
Demand proxy indicators: Legal Aid - Crime lower (volume) (LAA)	847K	792K (6% ↓ 2010/11)	733K (7% ↓ 2011/12)	735K (0% 2012/13)	713K (3% ↓ 2013/14)
Magistrates' courts: Total criminal trials (MoJ)	167K	157K (6% ↓ 2010/11)	155K (1% ↓ 2011/12)	159K (3% ↑ 2012/13)	163K (2% ↑ 2013/14)

[11] In the Oxera Segmentation Framework this covers contentious work in relation to all criminal offences. This was matched to the Criminal SRA category. Individual consumer legal needs in the Been arrested problem type used in the 2012 survey was matched to this category. LSCP tracker survey category of Any offences or criminal charges was matched to this category, but small sample sizes prohibit its use. This was matched to the Criminal, practice area reported in the 2011 and 2013 Barrister surveys. The Criminal litigation – Defence, CPS - Associate Prosecutor, Criminal litigation - Prosecution categories of work for Chartered Legal Executives was matched to this category This was matched to the Crime and Criminal categories in the 2015 Innovation survey.

Crown Court Trials (MoJ)	152K	148K (3% ↓ 2010/11)	133K (7% ↓ 2011/12)	139K (5% ↑ 2012/13)	137K (2% ↓ 2013/14)
Individual consumers who shopped around:	10%	21%	26%	8%	26%
Complaints accepted by LeO	6%	7%	9%	6%	7%
Supply:					
Chartered Legal Executives		7% (506)	7% (491)	6% (452)	6% (429)
Chartered Legal Executive Criminal advocacy		12% (876)	11% (766)	14% (919)	14% (897)
Estimated self-employed barristers in this market segment		31%	-	28%	-
Total solicitors turnover - %age of total:	£0.86bn (4.3%)	£0.96bn (4.6%)	£0.85bn (4.1%)	£0.80bn (3.8%)	£0.75bn (3.5%)
Total solicitors firms- %age of total:	26% (2,545)	25% (2,487)	24% (2,330)	24% (2,274)	24% (2,185)
Market share of largest 10 SRA firms	7%	14%	8%	10%	11%
Number of the top 10 firms still in the top 10 from previous year:	10	6 (4)	7 (3)	8 (2)	8 (2)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		13% (10%)	10% (4%)	13% (9%)	8% (4%)
New entrants – new to segment		6% (2%)	6% (1%)	7% (2%)	5% (1%)
New entrants – new to market		7% (8%)	4% (3%)	6% (7%)	3% (3%)
	Introduced new or significantly improved services			26%	

Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Significant changes to the way services are delivered	29%
	Currently do or are planning to offer services online	20%
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc	51%
	Used social media	44%

Employment[12]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 9%; Handled alone – 36%; Seek advice – 53% 2012: Take no action – 14%; Handled alone – 33%; Seek advice – 51% 2015: Take no action – 17%; Handled alone – 47%; Seek advice – 36%				
Small businesses	2012: Take no action – 7%; Handled alone – 56%; Seek advice – 37% 2014: Take no action – 8%; Handled alone – 61%; Seek advice – 30%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Trade Union/Professional Body – 22%; Citizens Advice – 15%; Employment Adviser – 4%; Solicitors – 33%. 2012-2015: Citizens Advice – 13%; Unreserved provider – 62%, Reserved provider – 1%, Solicitor – 24%.				
Small businesses	HR/Employment service – 36%; Other legal advice service– 17%; Accountant – 13%; Trade body/professional association – 8%; Barrister – 3% Solicitors were used by 45% of individual advice seekers in this segment				

[12] In the Oxera Segmentation Framework this covers Pensions, Unfair dismissal, Redundancy, and Establishing and maintaining contracts. This was matched to the Employment SRA category. Individual consumer legal needs were matched to the Employment category used in the 2006-2009 CSJS. 2012 Individual consumer legal needs in the Problem with employer (eg problems over pay, redundancy, etc) problem type used in the 2012 survey were matched to this category. LSCP tracker survey category of Employment disputes was matched to this segment. Staff misconduct (including unauthorised absence and disciplinary procedures), Dismissal (or threat of dismissal) of staff, Making staff redundant, Content or exercise of parental rights (including maternity) leave/pay or flexible working requests, Payment of wages/pension, Working conditions, Other employment contract issues (including changes to contract terms), Adjustments to jobs/workplace for disabled workers, Complaints/grievances made by employees/job applicants (including allegations of discrimination and harassment), and Employment of non-EU nationals Small Business legal needs categories were matched to this segment. This was matched to the Employment practice area reported in the 2011 and 2013 Barrister surveys. The Civil litigation - Employment category of work for Chartered Legal Executives was matched to this category. This was matched to the Employment category in the 2015 Innovation survey.

Large businesses	Unknown				
Demand proxy indicators: Employment Tribunals (Total claims)	218K	159K (27% ↓ 2010/11)	219K (38% ↑ 2011/12)	106K (52% ↓ 2012/13)	61K (42% ↓ 2013/14)
Individual consumers who shopped around:	6%	24%	16%	12%	31%
Complaints accepted by LeO	7%	8%	6%	5%	4%
Supply:					
Chartered Legal Executives		3% (237)	4% (246)	4% (258)	4% (267)
Estimated self-employed barristers in this market segment		5%	-	4%	-
Total solicitors turnover - %age of total:	£0.95bn (4.7%)	£0.94bn (4.5%)	£0.90bn (4.4%)	£0.91bn (4.3%)	£0.90bn (4.2%)
Total solicitors firms- %age of total:	40% (3,961)	39% (3,967)	41% (3,997)	41% (3,870)	40% (3,658)
Market share of largest 10 SRA firms	24%	22%	22%	22%	23%
Number of the top 10 firms still in the top 10 from previous year:	10	7 (3)	7 (3)	8 (2)	7 (3)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		17% (10%)	15% (6%)	14% (3%)	10% (2%)
All new entrants		9% (4%)	11% (2%)	9% (1%)	7% (1%)
New entrants – new to segment		8% (6%)	4% (4%)	5% (2%)	3% (1%)
	Introduced new or significantly improved services			31%	

Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Significant changes to the way services are delivered	25%
	Currently do or are planning to offer services online	17%
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc	48%
	Used social media	63%

Family[13]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 10%; Handled alone – 29%; Seek advice – 59% 2012: Take no action – 7%; Handled alone – 30%; Seek advice – 59% 2015: Take no action – 15%; Handled alone – 49%; Seek advice – 36%				
Small businesses	N/A				
Large businesses	N/A				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Citizens Advice – 6%; Council Advice Service – 3%; Barristers – 3%; Solicitors – 63%. 2012-2015: Citizens Advice – 11%; Unreserved provider – 32%, Reserved provider – 3%, Solicitor – 54%.				
Small businesses	N/A				
Large businesses	N/A				

[13] In the Oxera Segmentation Framework this covers contentious and non-contentious work in children and matrimonial work. This was matched to the Children and Family Matrimonial SRA categories. Individual consumer legal needs in the 2006-2009 CSJS survey of Children, Domestic violence, Post-relationship , and Divorce categories were matched to this category. Individual consumer legal needs in the Children (eg care proceedings, adoption, etc), Divorce/dissolution of civil partnerships, Domestic violence, and Problems following a relationship breakdown (including contact) problem types used in the 2012 survey were matched to this category. LSCP tracker survey category of Family matters was matched to this category. This was matched to the Family practice area reported in the 2011 Barristers survey. The Family law - Family category of work for Chartered Legal Executives was matched to this category. This was matched to the Children and Family and matrimonial categories in the 2015 Innovation survey.

Demand proxy indicators: Divorce cases started in England and Wales (MoJ)	134K	129K (3% ↓ 2010/11)	124K (4% ↓ 2011/12)	118K (6% ↓ 2012/13)	113K (4% ↓ 2013/14)
Family Proceedings (including divorce, children issues, domestic violence, & care proceedings) (MoJ)	311K	293K (6% ↓ 2010/11)	294K (0% 2011/12)	289K (2% ↓ 2012/13)	259K (10% ↓ 2013/14)
Individual consumers who shopped around:	22%	24%	26%	41%	33%
Complaints accepted by LeO	19%	18%	18%	17%	14%
Supply:					
Chartered Legal Executives		12% (919)	13% (885)	13% (860)	12% (818)
Chartered Legal Executive – Family Advocacy		3% (227)	3% (221)	4% (275)	4% (259)
Estimated self-employed barristers in this market segment		17%	-	18%	-
Total solicitors turnover - %age of total:	£1.03bn (5.1%)	£1.05bn (5.0%)	£1.03n (5.0%)	£1.02bn (4.8%)	£1.02bn (4.8%)
Total solicitors firms- %age of total:	49% (4,870)	48% (4,851)	49% (4,810)	49% (4,658)	50% (4,529)
Market share of largest 10 SRA firms	6%	6%	6%	6%	7%

Number of the top 10 firms still in the top 10 from previous year:	10	7 (3)	8 (2)	6 (4)	8 (2)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		12% (9%)	11% (6%)	10% (6%)	7% (4%)
New entrants – new to segment		4% (1%)	6% (2%)	4% (1%)	4% (1%)
New entrants – brand new firms		8% (8%)	5% (4%)	6% (5%)	3% (3%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services			31%	
	Significant changes to the way services are delivered			28%	
	Currently do or are planning to offer services online			21%	
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc			60%	
	Used social media			56%	

Immigration and nationality:[14]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 15%; Handled alone – 41%; Seek advice – 40% 2012: Take no action – 7%; Handled alone – 31%; Seek advice – 57% 2015: Take no action – 20%; Handled alone – 43%; Seek advice – 36%				
Small businesses	Unknown				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Citizens Advice – 12%; Law Centre/Advice agency – 12%; Immigration Advisor – 10%; Barristers – 2%; Solicitors – 46%. 2012-2015: Citizens Advice – 12%; Unreserved provider – 48%, Reserved provider – 4%, Solicitor – 32%.				
Small businesses	Unknown				
Large businesses	Unknown				
Demand proxy indicators: Long Term International Immigration (ONS)	591K	566K (4% ↓ 2010/11)	498K (12% ↓ 2011/12)	526K (6% ↑ 2012/13)	641K (22% ↑ 2013/14)

[14] In the Oxera Segmentation Framework this covers contentious and non-contentious work in Immigration and asylum, and National insurance details, visa applications. This was matched to the Immigration SRA category. Individual consumer legal needs in the 'Immigration problem' problem types used in the CSJS and the 2012 survey were matched to this category LSCP tracker survey category of Immigration matters was matched to this category. This was matched to the Immigration practice area reported in the 2011 and 2013 Barrister surveys. The Public law work - Immigration category of work for Chartered Legal Executives was matched to this category. This was matched to the Immigration category in the 2015 Innovation survey.

Individual consumers who shopped around:	18%	33%	27%	27%	33%
Complaints accepted by LeO	4%	4%	4%	4%	5%
Supply					
Chartered Legal Executives		1%	1%	1%	1%
Estimated self-employed barristers in this market segment		2%	-	2%	-
Total solicitors turnover - %age of total:	£0.16bn (0.8%)	£0.18bn (0.9%)	£0.17bn (0.8%)	£0.18bn (0.9 %)	£0.19bn (0.9%)
Total solicitors firms- %age of total:	15% (1,497)	15% (1,562)	16% (1,568)	17% (1,579)	17% (1,579)
Market share of largest 10 SRA firms	22%	25%	26%	29%	30%
Number of the top 10 firms still in the top 10 from previous year:	10	6 (4)	7 (3)	9 (1)	10 (0)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		19% (11%)	14% (5%)	14% (7%)	10% (5%)
New entrants – new to segment		6% (2%)	7% (2%)	6% (2%)	5% (2%)
New entrants – new to market		13% (9%)	7% (3%)	8% (5%)	5% (3%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services			33%	
	Significant changes to the way services are delivered			13%	
	Currently do or are planning to offer services online			22%	
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc			54%	
	Used social media			51%	

Injury[15]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 15%; Handled alone – 36%; Seek advice – 47% 2012: Take no action – 17%; Handled alone – 27%; Seek advice – 51% 2015: Take no action – 27%; Handled alone – 33%; Seek advice – 40%				
Small businesses	Unknown				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Citizens Advice – 5%; Insurance company – 20%;Claims Management Company (CMC) – 4%; The Police – 3%; Other – 22%; Solicitors – 46%. 2012-2015: Citizens Advice – 9%; Unreserved provider – 50%, Reserved provider – 3%, Solicitor – 38%.				
Small businesses	Unknown				
Large businesses	Unknown				

[15] In the Oxera Segmentation Framework this covers road traffic accidents, injury at work, clinical negligence, and slips and trips. This was matched to the Personal Injury SRA category. Individual consumer legal needs were matched to the Personal Injury and medical negligence categories used in the 2006-2009 CSJS. 2012 Individual consumer legal needs in the 'Been injured at work', 'Clinical negligence (injury or health problems after treatment)', 'Involved in a road traffic accident', and 'Other personal injury that was not your fault' problem types used in the 2012 survey were matched to this category. LSCP tracker survey category of Accident or injury claims was matched to the Injury segment. This was matched to the Personal Injury, practice area reported in the 2011 and 2013 Barrister surveys. This was matched to the Personal injury category in the 2015 Innovation survey.

Demand proxy indicators: Cases registered with Compensation Recovery Unit (DWP) - Exc. Clin Neg	987K	1,041K (5% ↑ 2010/11)	1,048K (1% ↑ 2011/12)	1,016K (3% ↓ 2012/13)	998K (2% ↓ 2013/14)
Claims to NHS Litigation Authority for Negligence (NHSLA)	13K	14K (6% ↑ 2010/11)	15K (7% ↑ 2011/12)	17K (13% ↑ 2012/13)	16K (3% ↓ 2013/14)
Individual consumers who shopped around:	12%	15%	9%	28%	15%
Complaints accepted by LeO	10%	10%	9%	10%	12%
Supply:					
Chartered Legal Executives		17%	19%	20%	21%
Estimated self-employed barristers in this market segment		10%	-	9%	-
Total solicitors turnover - %age of total:	£2.17bn (10.7%)	£2.48bn (11.8%)	£2.66bn (12.8%)	£2.66bn (12.7%)	£2.56bn (11.9%)
Total solicitors firms- %age of total:	31% (3,114)	30% (3,088)	32% (3,081)	31% (2,881)	30% (2,732)
Market share of largest 10 SRA firms	21%	23%	23%	25%	27%
Number of the top 10 firms still in the top 10 from previous year:	10	5 (5)	5 (5)	9 (1)	8 (2)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		16% (20%)	14% (19%)	12% (8%)	10% (4%)
New entrants – new to segment		6% (3%)	8% (4%)	6% (3%)	4% (4%)

New entrants – new to market		10% (17%)	6% (15%)	6% (5%)	6% (1%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services			46%	
	Significant changes to the way services are delivered			39%	
	Currently do or are planning to offer services online			23%	
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc			74%	
	Used social media			71%	

Intellectual Property Rights[16]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	N/A				
Small businesses	2012: Take no action – 12%; Handled alone – 54%; Seek advice – 33% 2014: Take no action – 10%; Handled alone – 58%; Seek advice – 32%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	N/A				
Small businesses	Trade Body - 15%; Barrister – 14%; Accountant – 12%; Other legal adviser – 10%; HR/Employment service – 6%; Business Link – 5% Solicitors were used by 68% of advice seekers in this segment				
Large businesses	Unknown				

[16] In the Oxera Segmentation Framework this covers contentious and Non-contentious work in IT, Confidentiality, Copyright, Trademarks, and Patents. This was matched to the Intellectual Property SRA category. This was matched to the INFRINGEMENT OF INTELLECTUAL PROPERTY BY YOUR BUSINESS: Unlawful obtaining of trade secrets, Patents, Database rights, Design right/registered design, Copyright, Trademarks, INFRINGEMENT OF YOUR BUSINESS' INTELLECTUAL PROPERTY: Disclosure of trade secrets, Patents, Database rights, Design right/registered design, Copyright, and Trademarks Small Business legal needs categories. This was matched to the Patent or IP practice area reported in the 2011 and 2013 Barrister surveys. This was matched to the Intellectual Property and Intellectual property rights categories in the 2015 Innovation survey.

Demand proxy indicators: Total Patent Applications (Applications for UK patents - UK & international)	12K	22K (2% ↑ 2010/11)	23K (4% ↑ 2011/12)	23K (1% ↓ 2012/13)	23K (0% 2013/14)
Total Trademark Applicants (UK only)	37K	40K (10% ↑ 2010/11)	46K (15% ↑ 2011/12)	51K (10% ↑ 2012/13)	54K (6% ↑ 2013/14)
Complaints accepted by LeO	-	-	-	-	-
Supply:					
Patent Attorneys	1,798	1,687	1,745	1,980	2,034
Trademark Attorneys	772	620	639	829	794
Estimated self-employed barristers in this market segment		1%	-	1%	-
Total solicitors turnover - %age of total:	£0.39bn (1.9%)	£0.43bn (2.0%)	£0.42bn (2.0%)	£0.42bn (2.0%)	£0.41bn (1.9%)
Total solicitors firms- %age of total:	6% (554)	5% (532)	6% (566)	6% (524)	6% (520)
Market share of largest 10 SRA firms	39%	44%	40%	42%	41%
Number of the top 10 firms still in the top 10 from previous year:	10	8 (2)	8 (2)	7 (3)	8 (2)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		25% (5%)	25% (10%)	20% (2%)	20% (2%)
New entrants – new to segment		15% (4%)	21% (4%)	14% (1%)	17% (2%)

New entrants – new to market	10% (1%)	4% (6%)	6% (1%)	3% (0%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Unknown - only 30 respondents to the 2015 Innovation study reported Intellectual Property Rights as their main area of work.			

Other[17]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	N/A				
Small businesses	2012: Take no action – 18%; Handled alone – 62%; Seek advice – 21% 2014: Take no action – 11%; Handled alone – 54%; Seek advice – 36%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	Unknown				
Small businesses	Unknown				
Large businesses	Unknown				
Demand proxy indicators:	None identified				
Complaints accepted by LeO	16%	17%	16%	12%	12%
Supply:					
Notaries & Scriveners	870	845	858	812	792
Cost Lawyers	270	411	565	563	562

[17] In the Oxera Segmentation Framework this covers contentious and Non-contentious work in Libel and defamation, Compensation arising from fraud, Debt management (debtor), Debt collection, judicial review, and public inquiries. This was matched to the Arbitration and Alternative Dispute Resolution, Debt collection, Financial Advice Regulated FSA, Financial Advice Regulated SRA, Litigation Other, and Non Litigation Other SRA categories. This was matched to the Professional negligence, International or EU, Public law, and Other practice areas reported in the 2011 and 2013 Barristers surveys. This was matched to the Arbitration and alternative dispute resolution, Debt collection, Litigation – other, Non-Litigation Other, Other, and Public administrative law categories in the 2015 Innovation survey.

<table>
<tr><td colspan="2">Chartered Legal Executives</td><td>29%
(2,190)</td><td>32%
(2,208)</td><td>33%
(2,214)</td><td>35%
(2,326)</td></tr>
<tr><td colspan="2">Estimated self-employed barristers in this market segment</td><td>5%</td><td>-</td><td>4%</td><td>-</td></tr>
<tr><td>Total solicitors turnover - %age of total:</td><td>£4.76bn
(23.6%)</td><td>£4.92bn
(23.5%)</td><td>£4.96bn
(23.9%)</td><td>£5.14bn
(24.5%)</td><td>£5.20bn
(24.3%)</td></tr>
<tr><td>Total solicitors firms- %age of total:</td><td>62%
(6,208)</td><td>63%
(6,355)</td><td>63%
(6,186)</td><td>64%
(5,991)</td><td>63%
(5,755)</td></tr>
<tr><td>Market share of largest 10 SRA firms</td><td>26%</td><td>27%</td><td>24%</td><td>25%</td><td>25%</td></tr>
<tr><td>Number of the top 10 firms still in the top 10 from previous year:</td><td>10</td><td>9 (1)</td><td>9 (1)</td><td>9 (1)</td><td>8 (2)</td></tr>
<tr><td colspan="6">Entry: % of SRA firms in this segment (% of market share)</td></tr>
<tr><td colspan="2">All new entrants</td><td>10% (6%)</td><td>13% (7%)</td><td>13% (3%)</td><td>9% (2%)</td></tr>
<tr><td colspan="2">New entrants – new to segment</td><td>8% (1%)</td><td>8% (2%)</td><td>8% (1%)</td><td>6% (1%)</td></tr>
<tr><td colspan="2">New entrants – new to market</td><td>9% (5%)</td><td>5% (5%)</td><td>5% (2%)</td><td>3% (1%)</td></tr>
<tr><td rowspan="5">Innovation 2013-2015 - Proportion of survey respondents in this segment who have:</td><td colspan="3">Introduced new or significantly improved services</td><td colspan="2">45%</td></tr>
<tr><td colspan="3">Significant changes to the way services are delivered</td><td colspan="2">29%</td></tr>
<tr><td colspan="3">Currently do or are planning to offer services online</td><td colspan="2">17%</td></tr>
<tr><td colspan="3">Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc</td><td colspan="2">52%</td></tr>
<tr><td colspan="3">Used social media</td><td colspan="2">52%</td></tr>
</table>

Property, construction and planning[18]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2012: Take no action – 9%; Handled alone – 47%; Seek advice – 41% 2015: Take no action – 14%; Handled alone – 55%; Seek advice – 31%				
Small businesses	2012: Take no action – 9%; Handled alone – 64%; Seek advice – 27% 2014: Take no action –11%; Handled alone – 60%; Seek advice – 29%				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Council Advice Service – 18%; Citizens Advice – 15%; Law Centre/advice agency – 5%; Solicitors – 27%. 2012-2015: Citizens Advice – 14%; Unreserved provider – 59%, Reserved provider – 2%, Solicitor – 25%.				
Small businesses	Accountant – 19%; Barrister – 17%; Specialist support service – 16%, Trade Body – 8% Solicitors were used by 65% of advice seekers in this segment.				

[18] In the Oxera Segmentation Framework this covers contentious and non-contentious work in Landlord and tenant problems, Repossession, Squatters, Boundaries and rights of way, Planning applications, Landlord and tenant (eg, drawing up contracts), Other reasons for drawing up contracts, Property finance, Property leasing, and Planning applications. This was matched to the Planning and Landlord Tenant SRA categories. Individual consumer legal needs in Problems with a landlord, Other problems with a property I own, Homelessness (being homeless or threatened with being homeless, Had problems with a tenant/ squatters, Had my home repossessed/ faced eviction from a rented proper, and Dealt with a planning application problem types used in the 2012 survey were matched to this category. LSCP tracker survey categories of Neighbour disputes and Housing, landlord or tenant problems were matched to this category. This was matched to the Rented- Rent arrears, Rented- Eviction, Rented- Repairs/maintenance or provision of services by landlord, Rented- Terms of rental agreement, Rented- Boundaries, Rented- Recovery of rental deposit, Owned- Mortgage arrears, Owned- Repossession, Owned- Repairs, Owned- Boundaries, Owned- Planning permission, and Owned-Squatters Small Business legal needs categories. This was matched to the Planning and environment, Landlord and tenant, and Construction practice areas reported in the 2011 and 2013 Barrister surveys. This was matched to the Landlord & Tenant and Planning categories in the 2015 Innovation survey.

Large businesses	Unknown				
Demand proxy indicators:	None identified				
Individual consumers who shopped around:	14%	25%	22%	30%	22%
Complaints accepted by LeO	5%	3%	5%	4%	4%
Supply:					
Chartered Legal Executives		3%	3%	4%	4%
Estimated self-employed barristers in this market segment		6%	-	6%	-
Total solicitors turnover - %age of total:	£0.50bn (2.5%)	£0.50bn (2.4%)	£0.50bn (2.4%)	£0.49bn (2.3%)	£0.48bn (2.2%)
Total solicitors firms- %age of total:	40% (3,963)	38% (3,859)	39% (3,827)	39% (3,668)	39% (3,552)
Market share of largest 10 SRA firms	21%	23%	23%	21%	24%
Number of the top 10 firms still in the top 10 from previous year:	10	7 (3)	7 (3)	6 (4)	8 (2)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		18% (13%)	16% (9%)	16% (15%)	13% (4%)
New entrants – new to segment		11% (8%)	13% (6%)	11% (12%)	10% (3%)
New entrants – new to market		7% (5%)	3% (3%)	5% (3%)	3% (1%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Unknown - only 16 respondents to the 2015 Innovation study reported Property, construction and planning as their main area of work.				

Welfare and benefits[19]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2010: Take no action – 10%; Handled alone – 29%; Seek advice – 60% 2012: Take no action – 10%; Handled alone – 47%; Seek advice – 40% 2015: Take no action – 16%; Handled alone – 51%; Seek advice – 33%				
Small businesses	N/A				
Large businesses	N/A				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Citizens Advice – 29%; Law Centre/advice agency – 11%; Council Advice Service – 9%; Solicitors – 7%. 2012-2015: Citizens Advice – 31%; Unreserved provider – 56%, Reserved provider – 2%, Solicitor – 12%.				
Small businesses	N/A				
Large businesses	N/A				
Demand proxy indicators:	None identified				

[19] In the Oxera Segmentation Framework this covers contentious and non-contentious work in Community care, Education, Benefits (including housing benefits), and Mental health work. This was matched to the Mental Health and Social Welfare SRA categories. Individual consumer legal needs in the 2006-2009 CSJS survey of Mental health, and Welfare benefits categories were matched to this category. Individual consumer legal needs in the Mental health issues (unsatisfactory treatment in care/hospital), Had problems getting the right welfare benefits, tax benefits etc, problem types used in the 2012 survey were matched to this category. The LSCP tracker survey category of Advice and appeals about benefits or tax credits was matched to this category. This was matched to the Mental Health and Social Welfare categories in the 2015 Innovation survey.

Individual consumers who shopped around	10%	14%	27%	9%	17%
Complaints accepted by LeO	-	3%	4%	4%	3%
Supply:					
Chartered Legal Executives		0%	1%	1%	1%
Estimated self-employed barristers in this market segment		Unknown			
Total solicitors turnover - %age of total:	£0.11bn (0.6%)	£0.09bn (0.4%)	£0.07bn (0.3%)	£0.06bn (0.3%)	£0.06bn (0.3%)
Total solicitors firms- %age of total:	6% (549)	4% (406)	4% (411)	4% (376)	4% (363)
Market share of largest 10 SRA firms	45%	50%	35%	42%	42%
Number of the top 10 firms still in the top 10 from previous year:	10	4 (6)	4 (6)	8 (2)	6 (4)
Entry: % of SRA firms in this segment (% of market share)					
All new entrants		22% (17%)	28% (26%)	23% (12%)	22% (19%)
New entrants – new to segment		17% (8%)	24% (20%)	16% (7%)	16% (11%)
New entrants – brand new firms		5% (9%)	4% (6%)	7% (5%)	6% (8%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Unknown - only 12 respondents to the 2015 Innovation study reported Welfare and benefits as their main area of work.				

Wills, trusts and probate[20]	2010/11	2011/12	2012/13	2013/14	2014/15
Demand:					
Action in response to this type of legal problem:					
Individuals	2012: Take no action – 6%; Handled alone – 37%; Seek advice – 52% 2015: Take no action – 7%; Handled alone – 45%; Seek advice – 49%				
Small businesses	Unknown				
Large businesses	Unknown				
Of those that seek advice other providers are used by:					
Individuals	2009-2012: Specialist will writer – 9%; Bank Building Society – 3% Citizens advice – 9%; Solicitors – 7%; IFA – 2%; Licensed Conveyancer – 1%. 2012-2015: Citizens Advice – 9%; Unreserved provider – 27%, Reserved provider – 4%, Solicitor – 60%.				
Small businesses	N/A				
Large businesses	N/A				
Demand proxy indicators:	246,600	260,504 (6% ↑ 2010/11)	243,262 (6% ↓ 2011/12)	260,969 (7% ↑ 2012/13)	247,298 (5% ↓ 2013/14)
Individual consumers who shopped around:	17%	20%	19%	17%	20%
Complaints accepted by LeO	13%	12%	12%	13%	12%

[20] In the Oxera Segmentation Framework this covers contentious and non-contentious work in Probate and estate administration, Trusts, and Wills. This was matched to the Probate Estate Administration and Wills Trusts Tax Planning SRA categories. Individual consumer legal needs in the 'Made a will and Dealt with the estate of a deceased relative (probate/estate') problem types used in the 2012 survey were matched to this category LSCP tracker survey categories of Will writing and Probate (ie Legal process of managing the estate of a deceased person by resolving all claims and distributing the deceased person's property under a valid will) were matched to this category. This was matched to Wills, trusts and probate, Wills trusts and tax planning, and Probate and estate administration categories in the 2015 Innovation survey.

Supply:					
Accountants – individual probate practitioners					0.3% (122)
Accountants – ABS entities					100
Notaries	-	-	-	4% (32) 64% private clients	
Number of licensed conveyancers	1,115	1,071	1,177	1,222	1,262
Total licensed conveyancer entities	215 (July 2011)	212 (July 2012)	216 (July 2013)	217 (September 2014)	214 (September 2015) Typical workload 7% will trusts and probate.
Chartered Legal Executives		12%	13%	14%	14%
Chartered Legal Executive Probate practitioner - from November 2014					
Estimated self-employed barristers in this market segment		Unknown			
Total solicitors turnover - %age of total:	£1.21bn (6.0%)	£1.20bn (5.7%)	£1.24bn (6.0%)	£1.18bn (5.6%)	£1.22bn (5.7%)
Total solicitors firms- %age of total:	56% (5.441)	54% (5,454)	54% (5,293)	54% (5,077)	54% (4,902)
Market share: (%age, £)					
Market share of largest 10 SRA firms	11%	12%	14%	11%	12%
Number of the top 10 firms still in the top 10 from previous year:	10	7 (3)	8 (2)	7 (3)	7 (3)
Entry: % of SRA firms in this segment (% of market share)					

All new entrants		11% (9%)	9% (8%)	9% (4%)	7% (6%)
New entrants – new to segment		4% (2%)	5% (5%)	4% (1%)	4% (3%)
New entrants – new to market		7% (7%)	4% (3%)	5% (3%)	3% (3%)
Innovation 2013-2015 - Proportion of survey respondents in this segment who have:	Introduced new or significantly improved services			35%	
	Significant changes to the way services are delivered			36%	
	Currently do or are planning to offer services online			19%	
	Invested in improving your reputation and branding over the last year, including spending on advertising, PR, etc			54%	
	Used social media			49%	