

Business

Telephone Survey Report

February 2018

Prepared for

Utah State Bar



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Business Telephone Survey Report

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Introduction

Lighthouse Research & Development, Inc. was contracted by the Utah State Bar to conduct a statewide telephone survey with business owners and decision makers regarding their perceptions and usage of legal services for their companies.

Project Objectives

Specific objectives for each section of the report are outlined below.

- Determine where respondents would go for various services for their company needs
- Identify the situations in which respondents would use a lawyer for their company needs
- Determine if respondents' companies have used a lawyer prior to the survey, and gather information and perceptions regarding their experiences
- Identify the reasons respondents had for using a lawyer for their business needs
- Determine where respondents would go to find a lawyer for their business needs
- Gather respondents' perceptions of lawyers
- Determine respondents' likelihood to use a lawyer in various business situations
- Identify barriers preventing companies from using a lawyer
- Discover respondents' lawyer fee preferences
- Discover how interested respondents would be in having a lawyer on retainer to handle their business needs
- Gather demographic profile information, including gender, industry, company size, annual company revenue, and counties in which respondents' companies are located

Project Overview

The research project consisted of a telephone survey designed to gather information from business owners and decision makers throughout Utah. The scope of work for the research project included the following:

- Project consultation with Utah State Bar personnel
- Programming of the telephone survey instrument
- Completion of at least 200 interviews; a total of 217 interviews were conducted
- Analysis of the data, including: percentages of results, cross-tabulations, and coding of open-ended responses
- A written report describing the results of the survey including research methodology, an executive summary, and a detailed description of the results

Research Methodology

The research methods used to complete the project are outlined in detail below.

Sampling Procedures

A random sample of general public respondents was obtained by Lighthouse Research and used for data collection. Prior to data collection, the sample was randomized using the WinCati program.

Pretest of the Questionnaire

A pretest was conducted between January 10 and January 12, 2018, to determine the need for any modifications to the survey questions or procedures. Following the pretest, adjustments to the survey were made in consultation with Utah State Bar personnel.

Data Collection

Lighthouse Research completed a total of 217 telephone interviews, for a confidence level of 95% with a $\pm 6.64\%$ margin of error.

All data collection was conducted by an experienced team of telephone interviewers at the Lighthouse Research interviewing facility located in Riverton, Utah. All field staff members were thoroughly briefed and trained on the survey before proceeding with data collection. Calling hours for the survey were between 9:00 a.m. and 9:00 p.m. on weekdays and between 9:00 a.m. and 4:00 p.m. on Saturdays.

The survey was programmed in a Computer-Assisted Telephone Interviewing (CATI) format. Using the CATI system, survey responses were directly entered into the database by the interviewer as the interview was in progress. Interviews were automatically given a numeric code upon entry into the system to assist in the data analysis. All data collection for this survey was completed between January 10, 2018, and February 5, 2018.

Data Analysis

The data analysis provides the following statistics upon which the written interpretative report is based:

- The frequency and valid percent of responses to each of the survey questions
- Responses to open-ended questions, coded for all occurrences of five or more mentions
- Cross-tabular analysis to compare the significant differences in responding among various demographic groups

Organization of the Report

The remainder of the report is organized under the following areas:

- Executive Summary
- Detailed Results
- Segment Analysis
- Appendices

The Executive Summary section of this report includes the key research findings from the telephone survey.

The Detailed Results section includes charts and a written description of the results for that topic. The Detailed Results section also includes average means and medians that exclude those respondents who selected “don’t know” and “wouldn’t say.”

The Segment Analysis sections contain the results of the cross-tabular analysis and indicates significant differences in responding among respondents.

The Appendices section of the report provides a copy of the survey questionnaire with frequencies of responses, and complete lists of all verbatim responses collected during the survey. The responses given by respondents that were placed in the “other” category when the response did not fit any of the options for that question are also reported in the Appendices.

The following report represents the deliverable for this contract and is presented respectfully to the project sponsors.

Executive Summary

The following represent a summary of the most pertinent findings of the telephone research.

Detailed Results Key Findings

Where Respondents would go for their Business-related Needs

As the table below illustrates, respondents most frequently said they would contact a lawyer if they needed assistance with “writing or negotiating a contract.” Respondents indicated they were *least* likely to contact a lawyer for assistance with “tax rules and regulations.”

- It is also interesting to note the percentage of respondents who said they would “not seek advice / deal with it themselves.” Respondents were the most likely to say they would not seek advice for (1) starting a new business or for (2) employee procedures or problems.

Where or who would you go to if your company needed assistance with...

	Lawyer	Not Seek Advice
Writing or Negotiating a Contract	59%	16%
The Purchase or Sale of the Business	33%	7%
Starting a New Business	27%	22%
Employee Procedures or Problems	25%	26%
Tax Rules and Requirements	11%	4%

Reasons for Using a Lawyer and Resources for Finding One

Among all respondents, 24% said they might use a lawyer for their company if they were being sued, while another 18% said they would use a lawyer if they needed assistance writing or negotiating a contract.

When asked where they would go to find a lawyer if they needed assistance today, 35% of respondents said they “already have a lawyer,” 30% said they would rely on “referrals” from others, and another 27% said they “personally know a lawyer.”

Past Experience with a Lawyer: Overall, 71% of respondents said their company has previously used a lawyer.

- 52% found their lawyer through “recommendations or referrals,” while another 29% said the lawyer they used was someone they personally knew.

Using a Lawyer as Opposed to Other Means

- As opposed to handling situations by themselves or through some other means, respondents most frequently said they used a lawyer “to ensure the matter was taken care of properly or legally” (15%).
 - *“If somebody is challenging you, you want to make sure you’re doing everything properly and not have to worry about other problems later.”*
 - *“To cut through all the red tape and find out how to do it the best way.”*

- Respondents also said they went with a lawyer because “the situation was beyond what the company could handle itself” (14%).
 - *“I tried to handle it on my own and it was getting ridiculous and I had to get someone with a higher power.”*
 - *“We tried to do it ourselves but could not get any money out of them so we got an attorney.”*

- Some respondents said they went with a lawyer because of the “legal knowledge or expertise a lawyer provides” (12%).
 - *“We needed their level of expertise to make sure our contract was sound, and that there were no questions about what was going on.”*

Among respondents who have previously used a lawyer, 13% said they did so because of “lending or other debt related issues,” while another 11% said they used a lawyer to assist them with the “purchase or sale of a business.”

- It is interesting to note, however, the differences between the situations for which companies might use a lawyer and the situations for which companies have actually used a lawyer. See the table below for more details.

**Using a Lawyer
Potential Situations vs. Actual Situations**

Top Mentions	Companies MIGHT Use a Lawyer for...	Companies HAVE Used a Lawyer for...
Being Sued / Legal Action Taken Against Them	24%	5%
Write or Negotiate a Contract	18%	8%
Employee Procedures or Problems	12%	5%
Lending or Other Debt Related Issues	11%	13%
Purchase or Sale of the Business	9%	11%
Copyright, Trademark, or Patent Issues	6%	9%
Real Estate Needs, Including Leases	4%	8%

Perceptions of Lawyers

On average, respondents gave a mid-range rating of 4.78 on the seven-point scale to describe their impression of lawyers. (Scale: 1 = Very Negative; 4 = Neutral; 7 = Very Positive)

- **Top 2 Box (positive):** 35% of respondents gave a rating of 6 or 7
- **Bottom 2 Box (negative):** Only 7% of respondents gave a rating of 1 or 2

The table below shows the likelihood of companies to use a lawyer for various situations. On average, respondents said they would be most likely to use a lawyer for “copyright, trademark, or patent issues” or the “purchase or sale of the business.”

Likelihood to Use a Lawyer for Various Situations

		Average Rating	Rating of 6-7
Tier 1	Copyright, Trademark, or Patent Issues	5.18	61
	Purchase or Sale of the Business	5.10	55
	Write or Negotiate a Contract	4.73	47
<hr/>			
Tier 2	Starting a New Business	3.86	29
	Regulation or Compliance Issues	3.82	24
	Real Estate Needs, Including Leases	3.59	23
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Tier 3	Licensing Needs	3.35	19
	Privacy and Data Protection	3.32	18
	Employee Procedures or Problems	3.26	15
<hr/>			
Tier 4	Lending or Other Debt Related Issues	3.09	15
	Tax Rules and Requirements	2.94	14

Barriers Preventing Companies from Using a Lawyer

As expected, respondents identified “cost” as the biggest barrier preventing businesses from using the services provided by a lawyer.

- Aside from cost, respondents mentioned “lack of trust” and “not knowing how a lawyer can help” as the next biggest barriers.

	%
Cost	82%
Lack of Trust	18%
Not Knowing How a Lawyer Can Help	17%
Not Necessary / No Need	11%
Not Knowing Where to Start	9%
Bad Reputation of Lawyers	6%
General Lack of Knowledge about Lawyers / Their Jargon	4%
Finding a Good Lawyer / The Right Lawyer	4%
Time Commitment	4%
Doubting their Understanding of My Situation	3%
Other (Specify)	12%
Don't Know (1 st Mention)	5%

Fee Preference

Regarding lawyer fee arrangements, 32% of respondents would prefer “a firm quote for an entire case or project,” while 23% would prefer “a set amount for a specific task or service.”

- Another 18% said they would prefer an “hourly rate.”

Respondents, on average, gave a low rating of 2.11 on the one-to-seven rating scale to describe their interest in having a lawyer on retainer for their business. (Scale: 1 = Not at all Interested; 7 = Very Interested)

- **Top 2 Box (interested):** Only 9% of respondents gave a rating of 6 or 7
- **Bottom 2 Box (not interested):** 75% of respondents gave a rating of 1 or 2

Statistical Analysis Summary

The following charts, tables, and descriptions summarize the key findings from the statistical analysis or survey results. For more detailed information please see the segment analysis portion of the report.

Impressions of Lawyers

The following market segments had a more positive impression of lawyers:

- Women had a more positive impression than did men
- Respondents from large companies had a more positive impression than did respondents from medium and small companies
- Respondents at companies that have previously used a lawyer had a more positive impression than did respondents at companies that have NOT used a lawyer

Likelihood of Using a Lawyer for Various Situations

In general, larger companies gave a higher likelihood than smaller companies to using a lawyer in many of the situations.

Likelihood of Using a Lawyer for Various Situations

Statistically Higher Averages Are Highlighted in Green

Statistically Lower Averages Are Highlighted in Red

	Small (1-5)	Medium (6-10)	Large (11+)
Purchase or Sale of the Business	4.48	5.15	5.94
Copyright, Trademark, or Patent Issues	4.97	5.23	5.45
Write or Negotiate Contract	4.26	4.82	5.30
Regulation or Compliance Issues	3.44	3.79	4.37
Starting a New Business	3.26	4.18	4.35
Real Estate Needs, Including Leases	3.36	3.63	3.87
Licensing Needs	2.83	3.61	3.79
Privacy and Data Protection	2.90	3.43	3.78
Employee Procedures or Problems	2.77	3.44	3.71
Lending or Other Debt Related Issues	2.70	3.26	3.44
Tax Rules and Requirements	2.93	3.00	2.89

When it came to industries, respondents in the customer services industries and in the government, education, healthcare, and insurance industries gave a higher likelihood than other industries to using a lawyer for a few of the situations.

Likelihood of Using a Lawyer for Various Situations

Statistically Higher Averages Are Highlighted in Green

Statistically Lower Averages Are Highlighted in Red

	Business/ Financial/ Technology	Blue Collar	Customer Services	Government/ Education/ Healthcare/ Insurance
Write or Negotiate Contract	4.04	4.28	5.07	5.58
Real Estate Needs, Including Leases	2.85	3.27	3.81	4.40
Licensing Needs	2.67	3.03	3.94	3.47

In almost all situations, respondents at companies that have previously used a lawyer gave a higher likelihood to using a lawyer.

Likelihood of Using a Lawyer for Various Situations

Statistically Higher Averages Are Highlighted in Green

	Have Used a Lawyer	Have Not Used a Lawyer
Copyright, Trademark, or Patent Issues	5.43	4.57
Employee Procedures or Problems	3.46	2.79
Lending or Other Debt Related Issues	3.24	2.72
Licensing Needs	3.65	2.55
Privacy and Data Protection	3.43	3.02
Purchase or Sale of the Business	5.37	4.52
Real Estate Needs, Including Leases	3.86	2.97
Regulation or Compliance Issues	3.97	3.38
Starting a New Business	4.24	2.97
Tax Rules and Requirements	3.05	2.73
Write or Negotiate Contract	4.98	4.08

Analysis by Companies That Have Used a Lawyer

The following table shows the percentage of respondents who said they would go to a lawyer if their company needed assistance in various situations. In all cases, if the company had previously used a lawyer, they were more likely to say they would use one again.

% Who Would Go to a Lawyer for Assistance in Various Situations

Statistically Higher Percentages Are Highlighted in Green

% Who Would go to a Lawyer	Have Used a Lawyer	Have NOT Used a Lawyer
Employee Procedures or Problems	31%	8%
The Purchase or Sale of the Business	40%	18%
Starting a New Business	34%	10%
Tax Rules and Requirements	14%	2%
Writing or Negotiating a Contract	69%	37%

It is interesting to note the differences between respondents at companies that have previously used a lawyer and respondents at companies that have not, when it came to where they would go if their company needed the assistance of a lawyer today.

Where Respondents Would Go if Their Company Needed a Lawyer Today

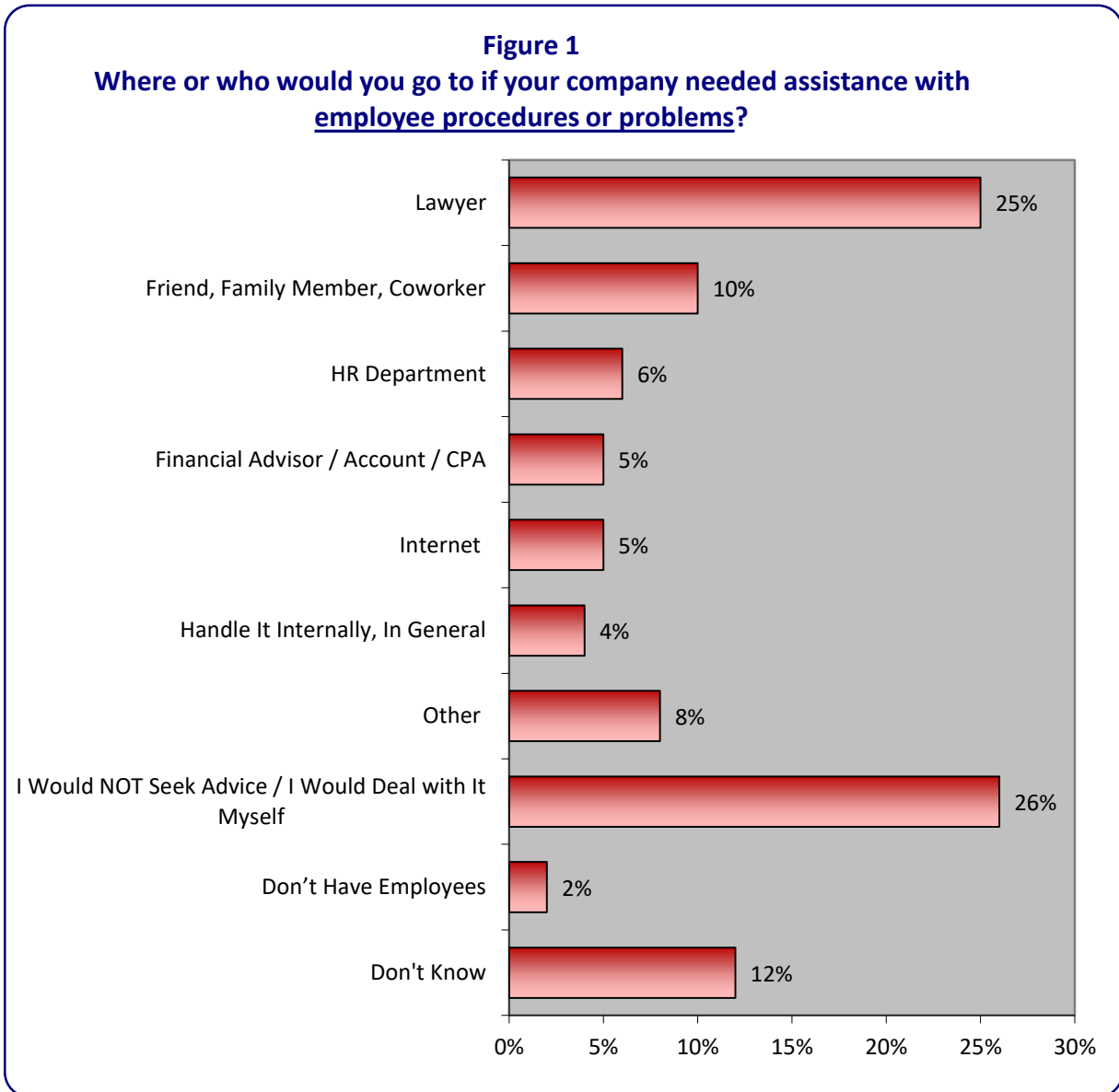
Statistically Higher Percentages Are Highlighted in Green

	Have Used a Lawyer	Have NOT Used a Lawyer
Already Have a Lawyer	44%	12%
Personally Know a Lawyer	29%	23%
Internet Search / Google	10%	23%
Referral / Word of Mouth	22%	51%

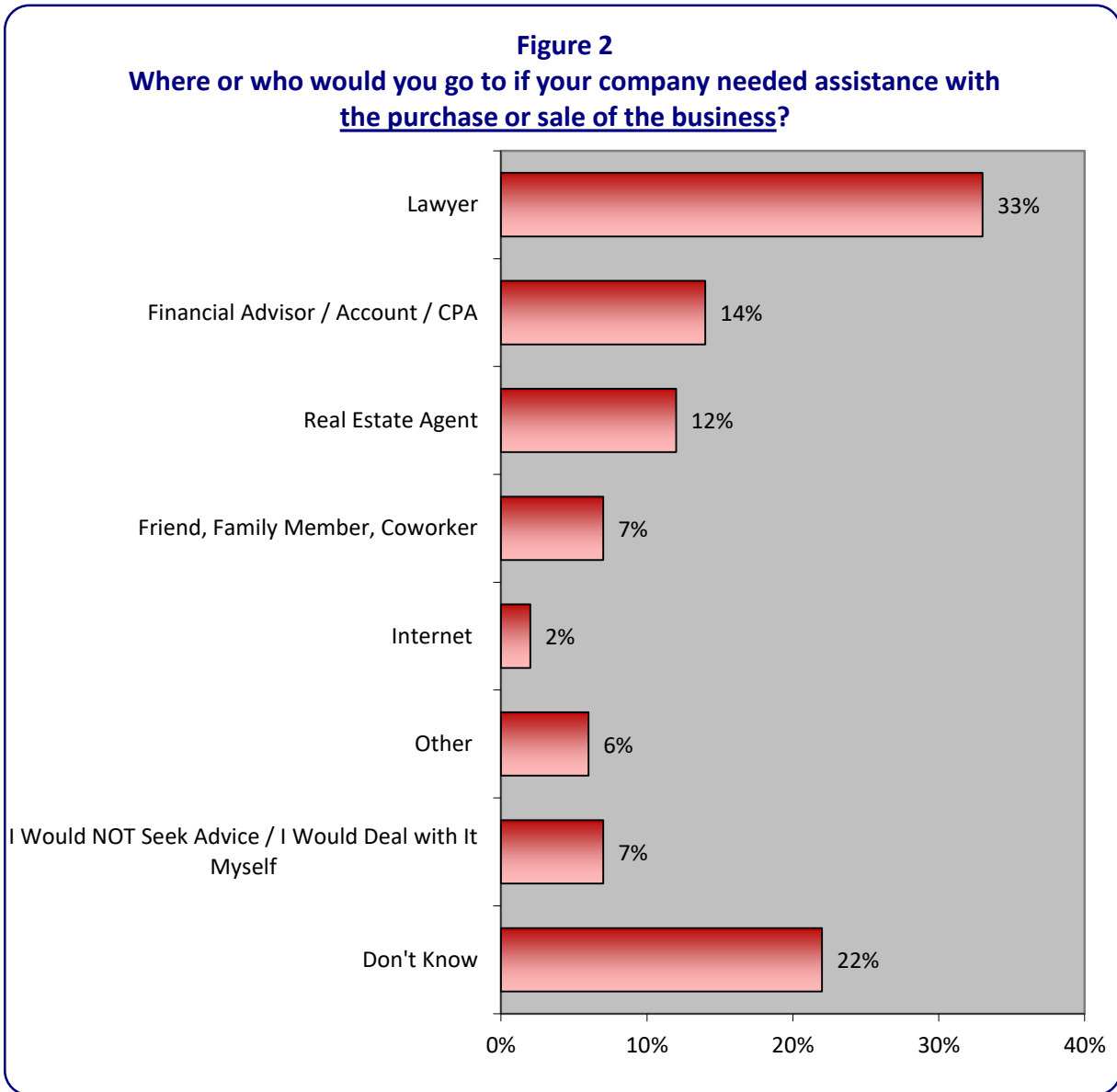
Detailed Results

Where Respondents would go for their Business-related Needs

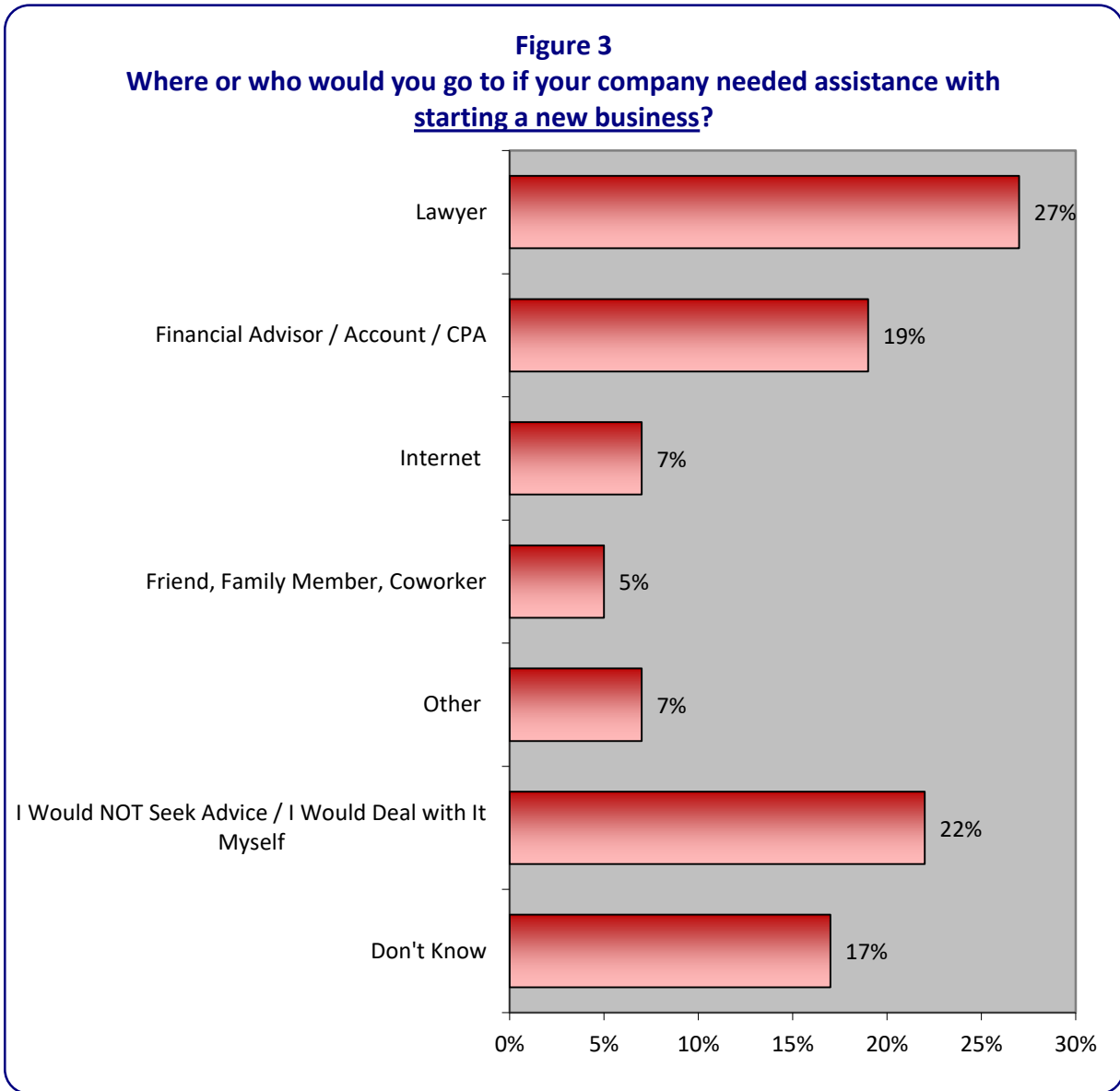
When asked where they would go if their companies needed assistance with “employee procedures or problems,” one-quarter of respondents *each* said they would contact a lawyer (25%) or deal with the situation themselves (26%). Please see Figure 1 for further details.



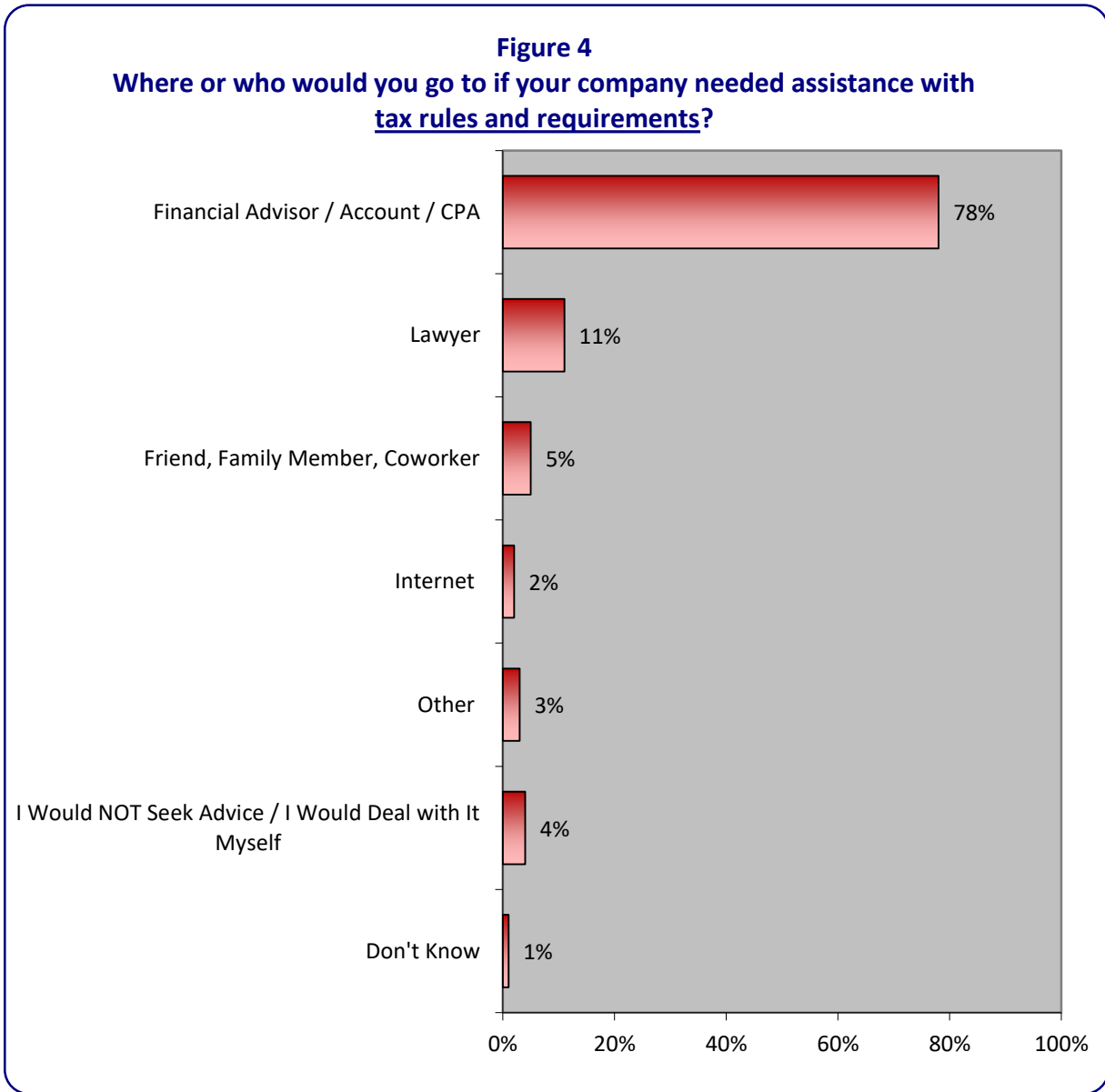
As Figure 2 illustrates, one-third of respondents (33%) said they would contact a lawyer if their company needed assistance with “the purchase or sale of the business.”



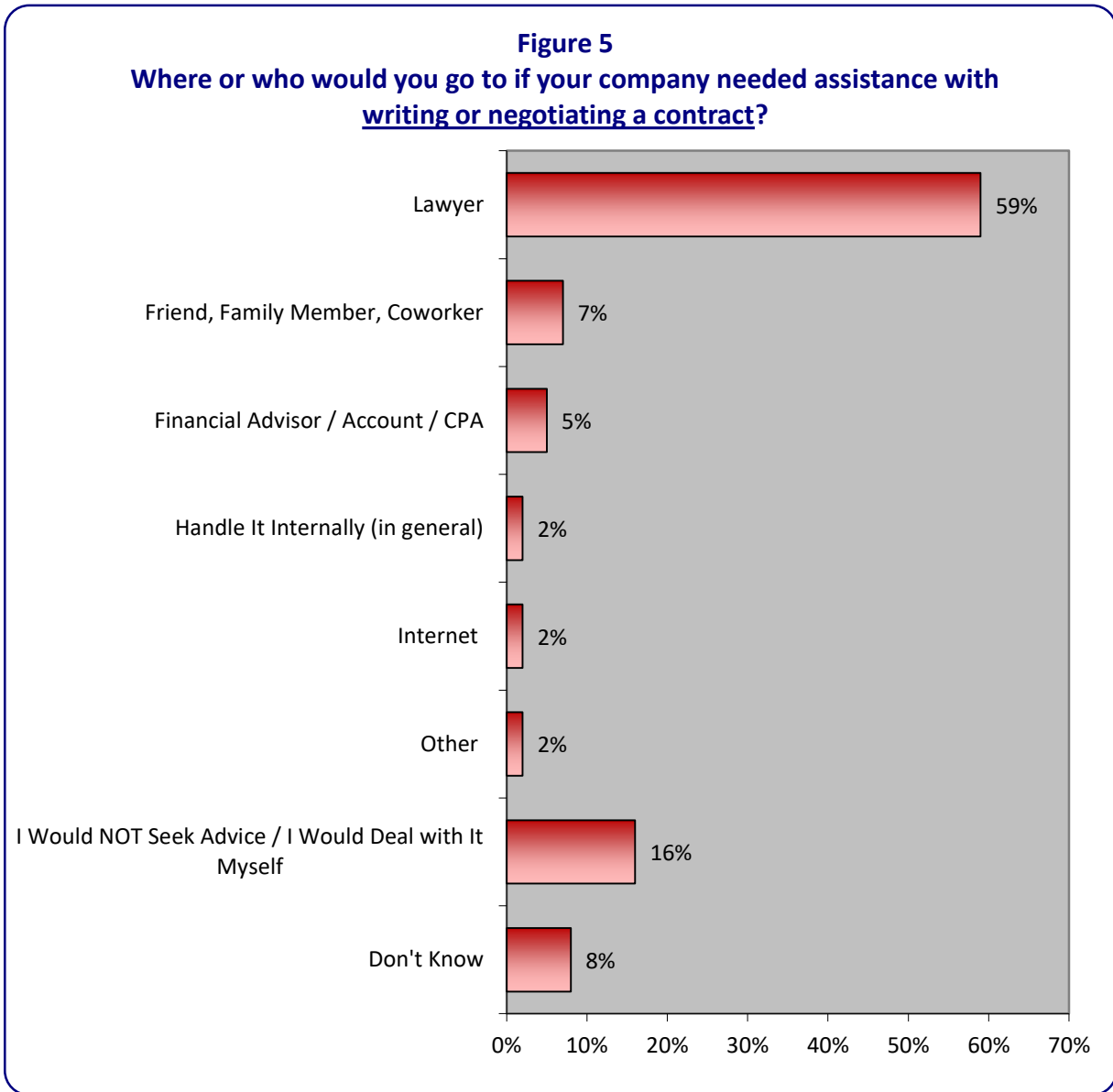
When asked where they would go if their companies needed assistance with “starting a new business,” 27% of respondents said they would contact a lawyer, though 22% said they would handle it on their own, and 19% said they would seek advice from a financial advisor. Please refer to Figure 3.



As Figure 4 illustrates, more than three-quarters of respondents said they would contact a financial advisor if their company needed assistance with “tax rules and requirements,” while 11% said they would contact a lawyer.

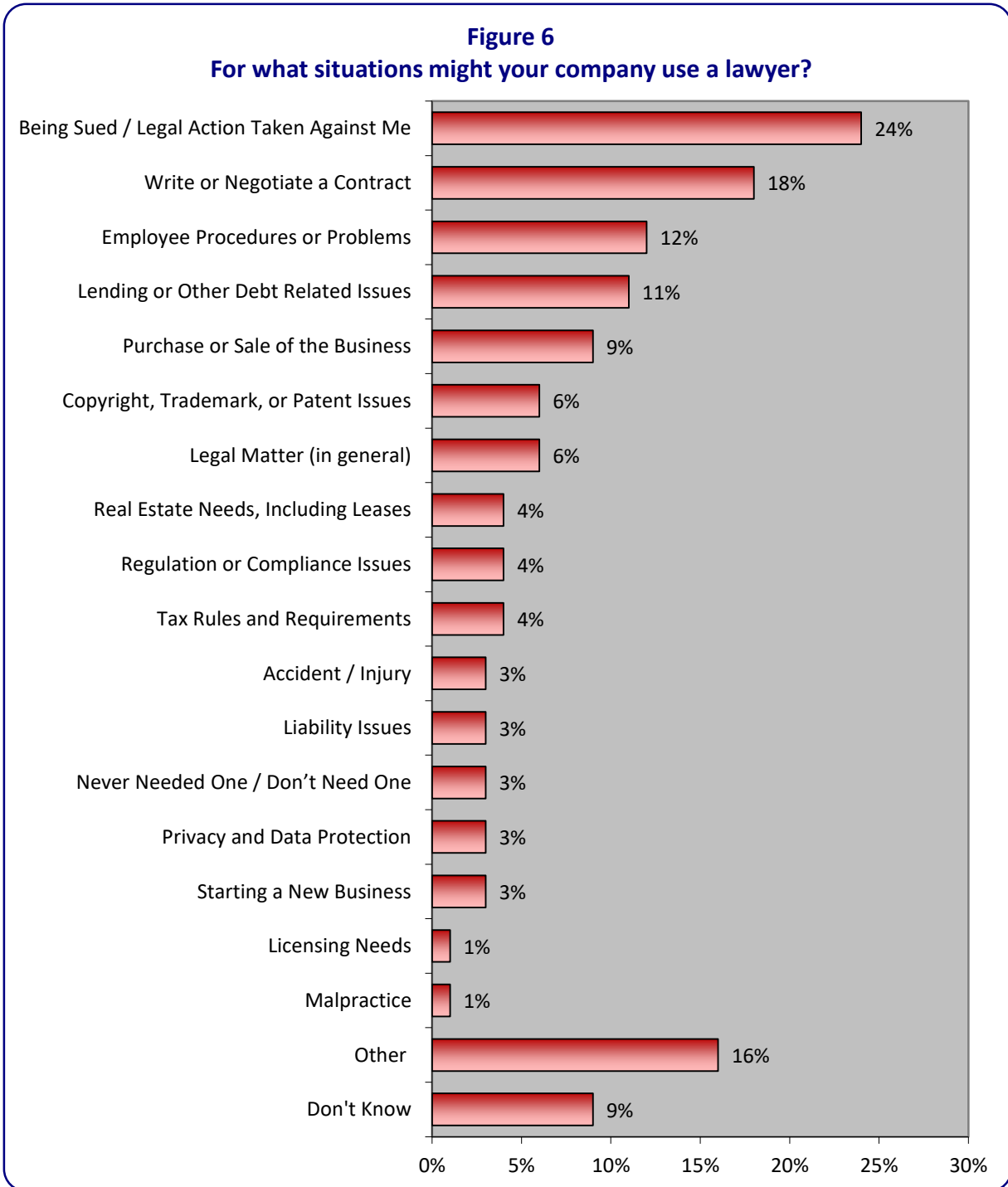


As Figure 5 illustrates, 59% of respondents said they would contact a lawyer for assistance with “writing or negotiating a contract.”

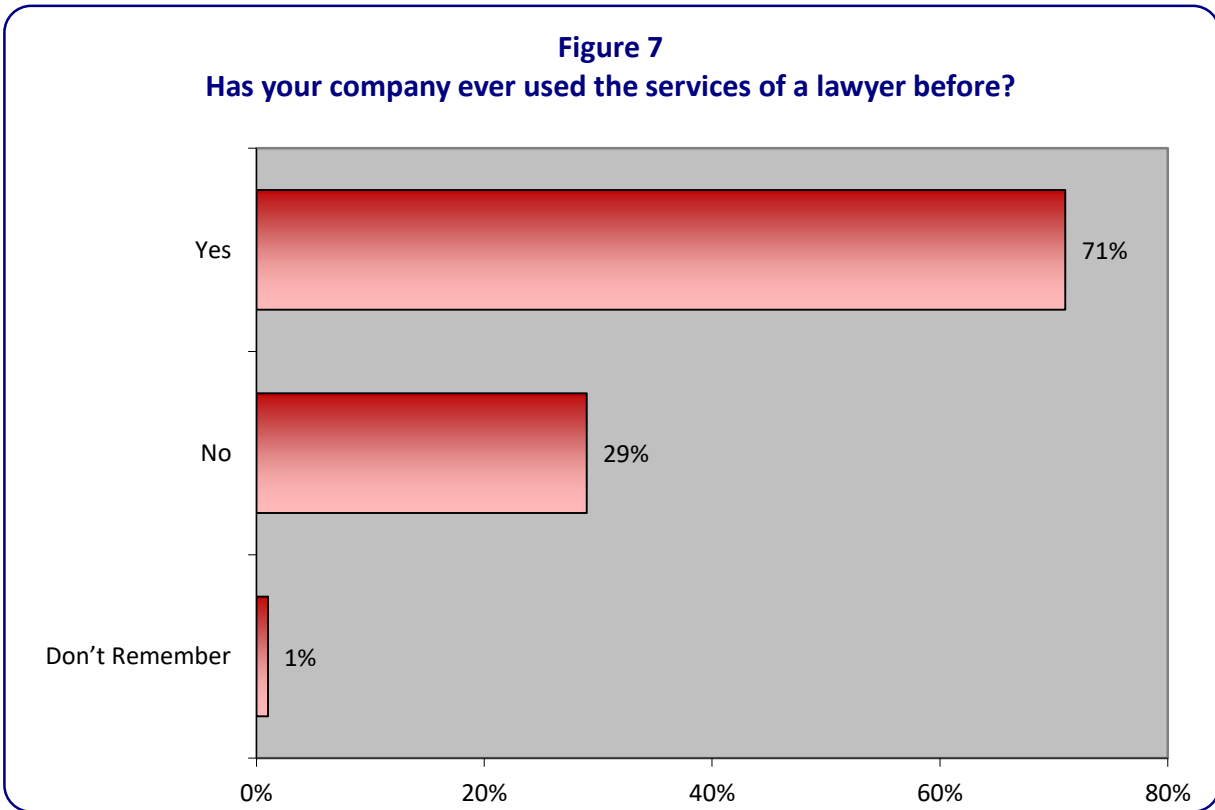


Reasons for Using a Lawyer and Resources for Finding One

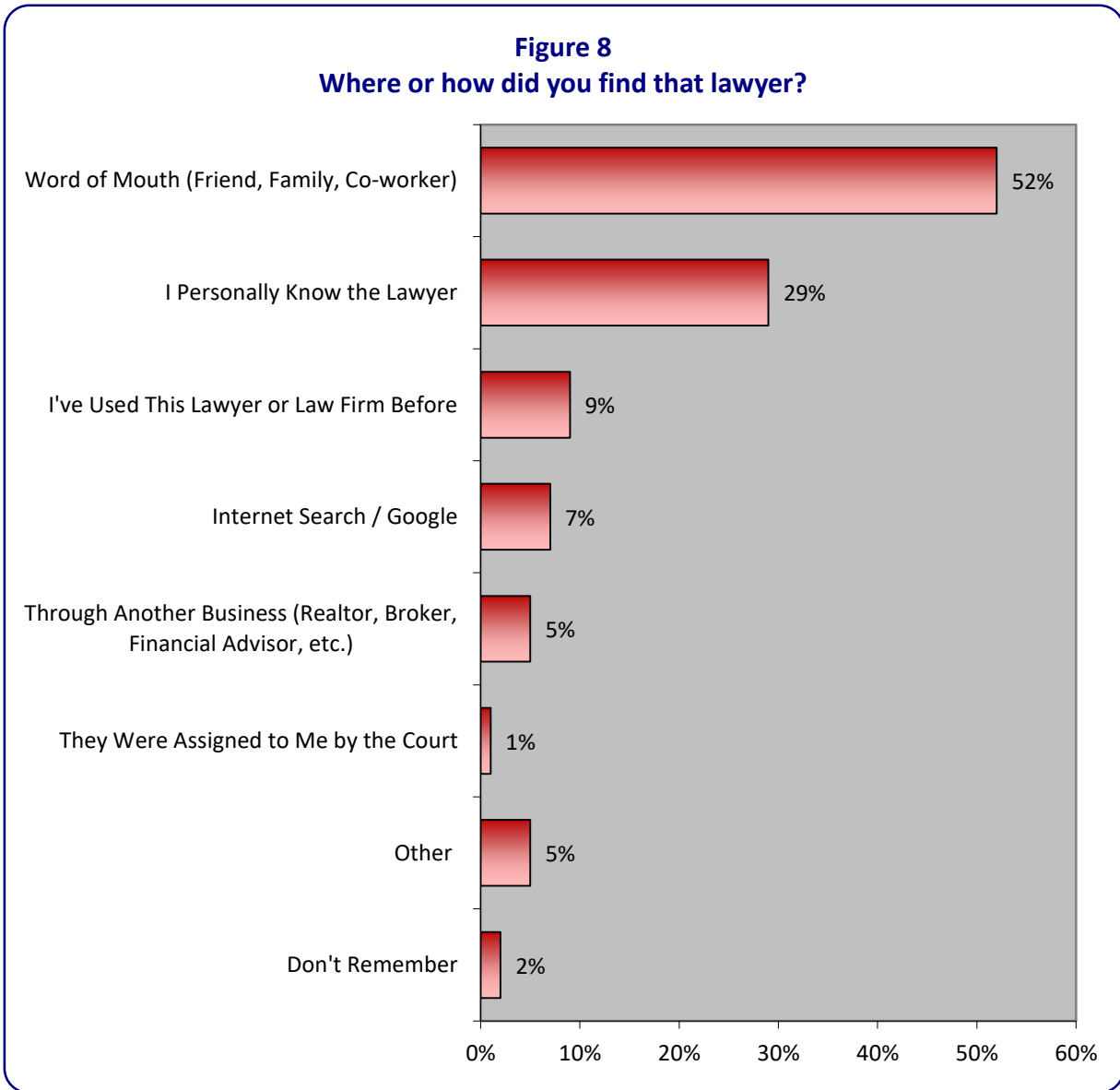
When asked to identify the situations where their companies might utilize the services of a lawyer, respondents most frequently said they would use a lawyer if they were being sued or if legal action taken against them (24%) or if they needed assistance with writing or negotiating a contract (18%). Please see Figure 6.



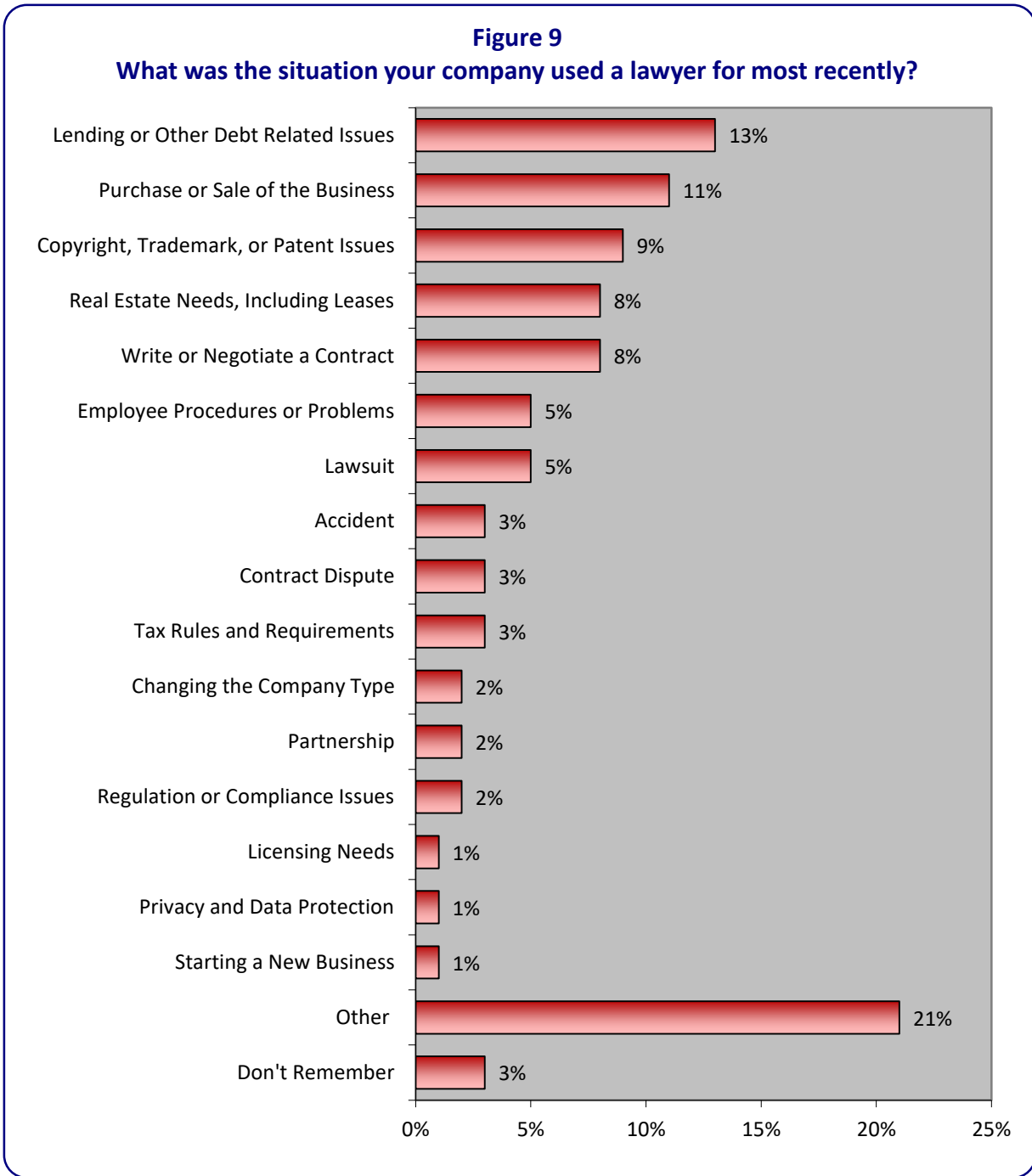
As Figure 7 illustrates, 71% of respondents said that their companies have used a lawyer prior to taking the survey.



When asked how they found their lawyer, 52% of respondents said they found a lawyer through word of mouth recommendations, while 29% said they personally know their lawyers. Please see Figure 8.

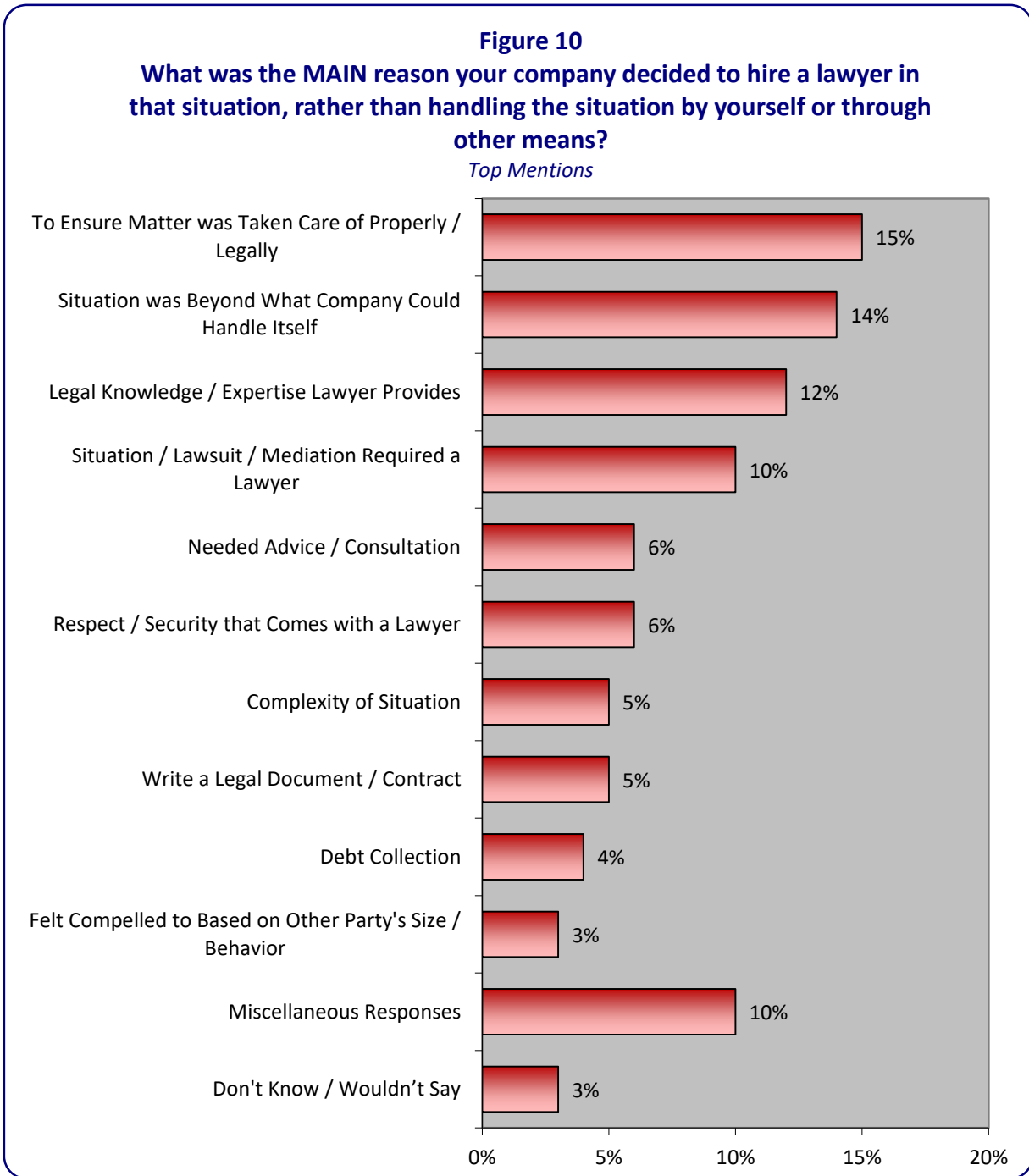


As Figure 9 illustrates, 13% of respondents said their companies most frequently used a lawyer for lending or other debt-related issues (13%) or for the purchase or sale of the business (11%).



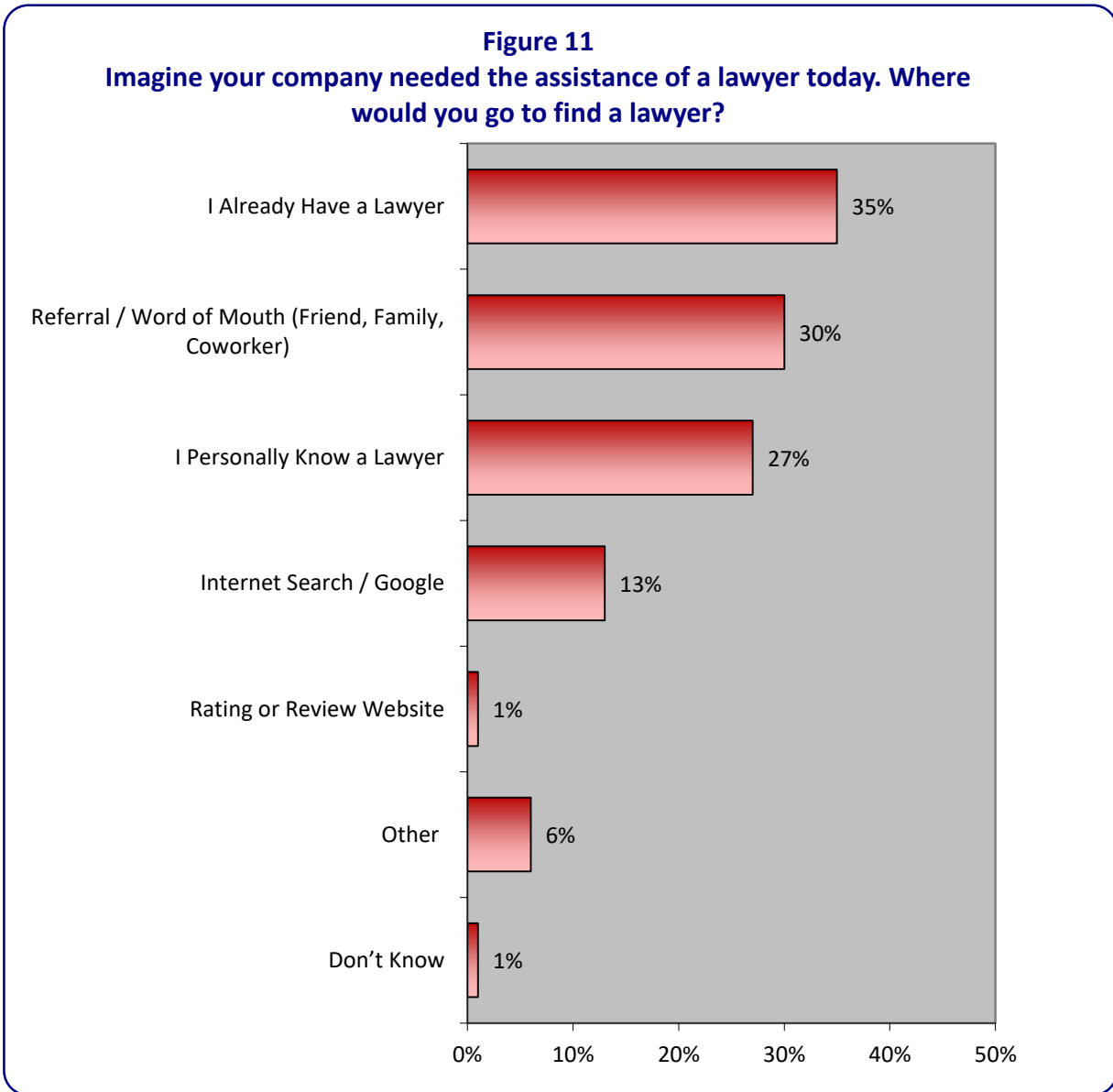
Note: Percentages in the above chart are based on those respondents whose companies have used the services of a lawyer.

When asked to identify the main reasons their companies utilized the services of a lawyer, rather than handle the issues themselves, 15% of respondents said they chose to use a lawyer “to ensure the matter was taken care of properly or legally,” while 14% said “the situation was beyond what the company could handle itself.” Twelve percent of respondents said they chose to use a lawyer for the expertise and legal knowledge the lawyer provided, while 10% said they used a lawyer as it was a situation that required one. Please see Figure 10 for further details.



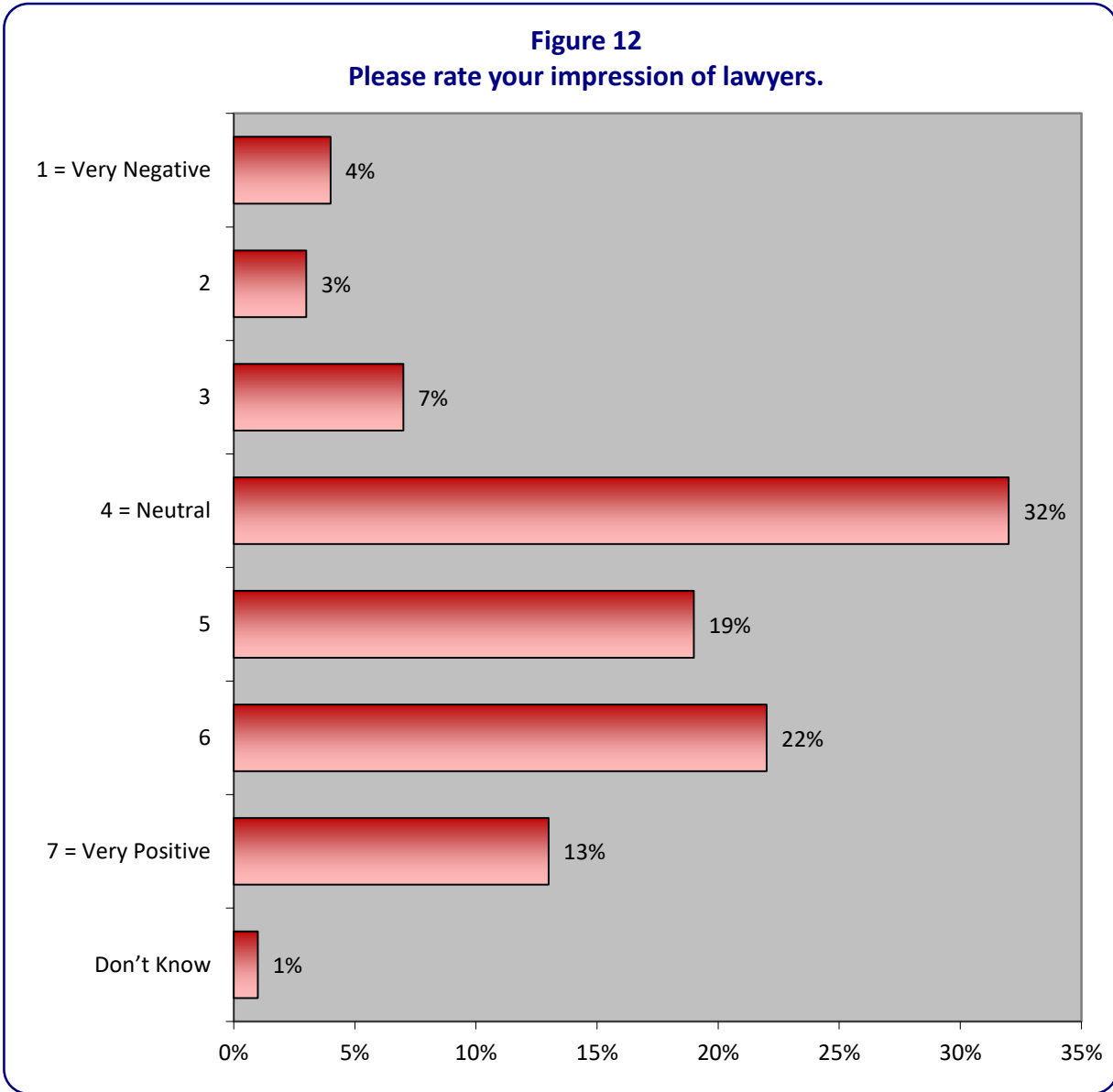
Note: Percentages in the above chart are based on those respondents whose companies have used the services of a lawyer.

When asked where they would go if they needed the assistance of a lawyer today, 35% said they already have a lawyer, while 30% said they would rely on a word of mouth recommendations, and 27% said they would go to a lawyer they personally know. Please see Figure 11 for details.

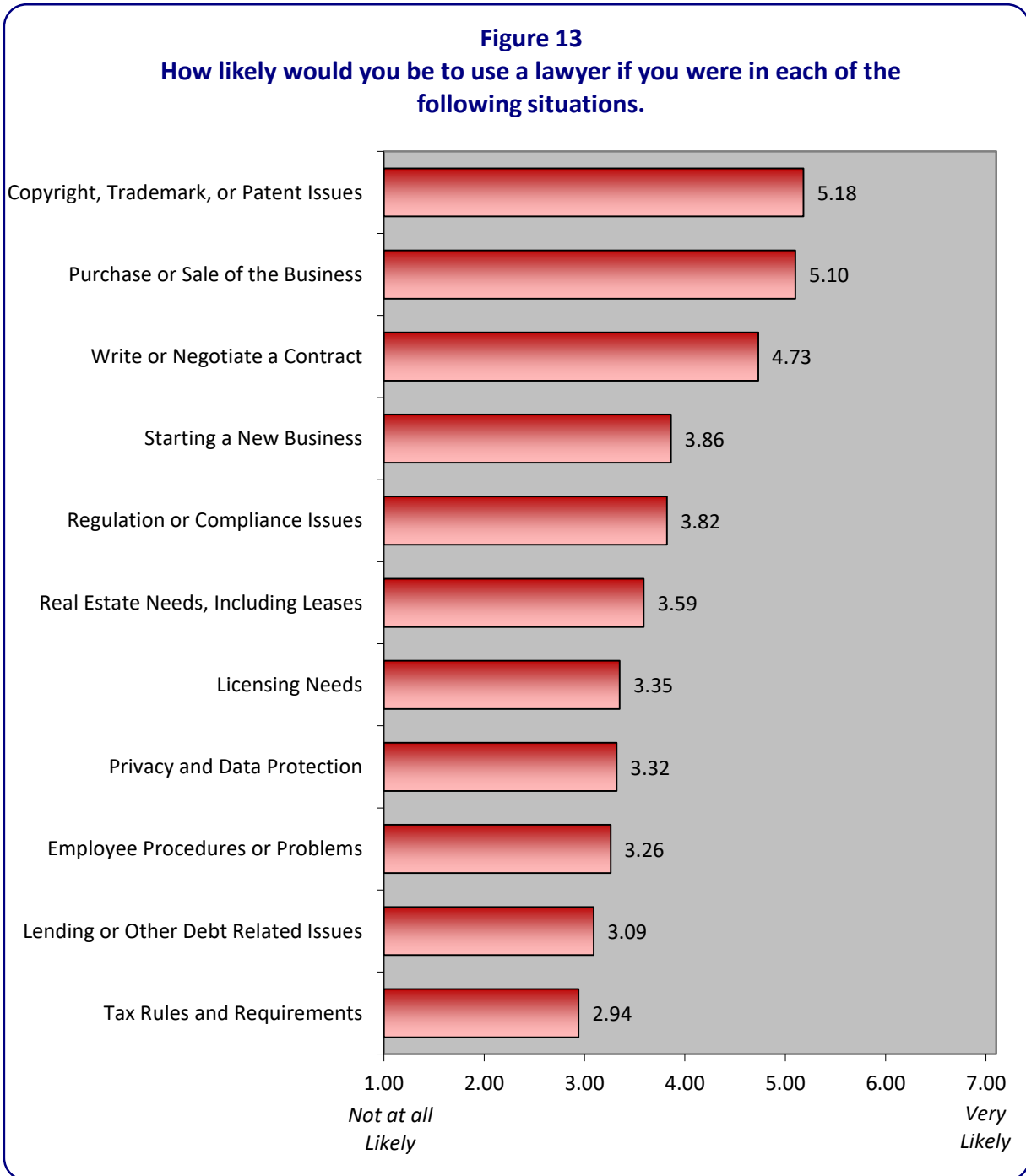


Perceptions of Lawyers

When asked to rate their impression of lawyers, one-third of respondents said they have a “neutral” opinion of lawyers. On average, respondents gave a mid-range rating of 4.78 on the seven-point scale to describe their impression of lawyers. Please see Figure 12 for details.

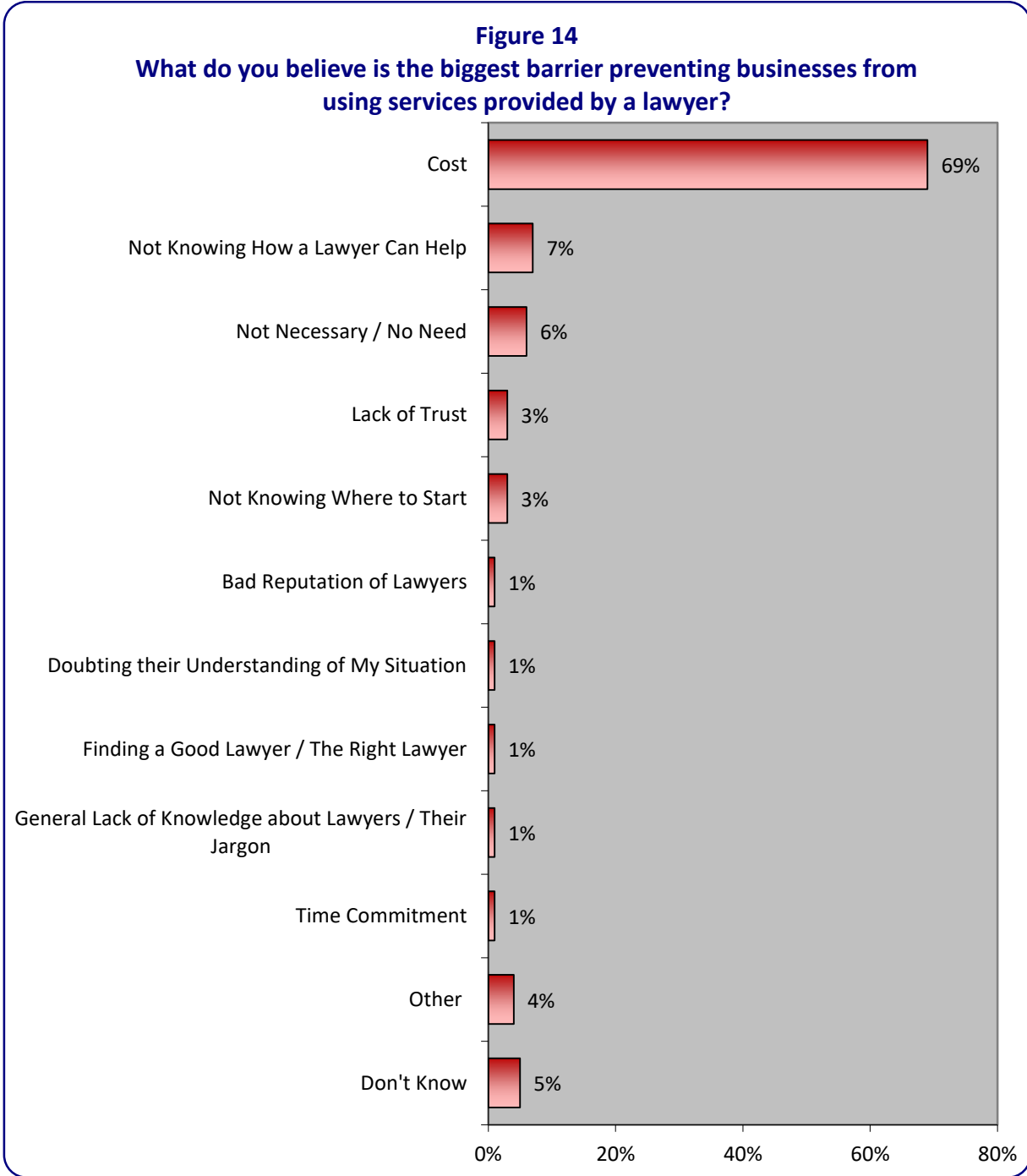


When asked how likely they would be to use a lawyer in various situations, respondents, on average, said they would be most likely to use a lawyer for “copyright, trademark, or patent issues” (5.18 average mean) or the “purchase or sale of the business” (5.10). Respondents, on average, indicated they would be least likely to contact a lawyer for assistance with “tax rules and requirements” (2.94). Please refer to Figure 13.

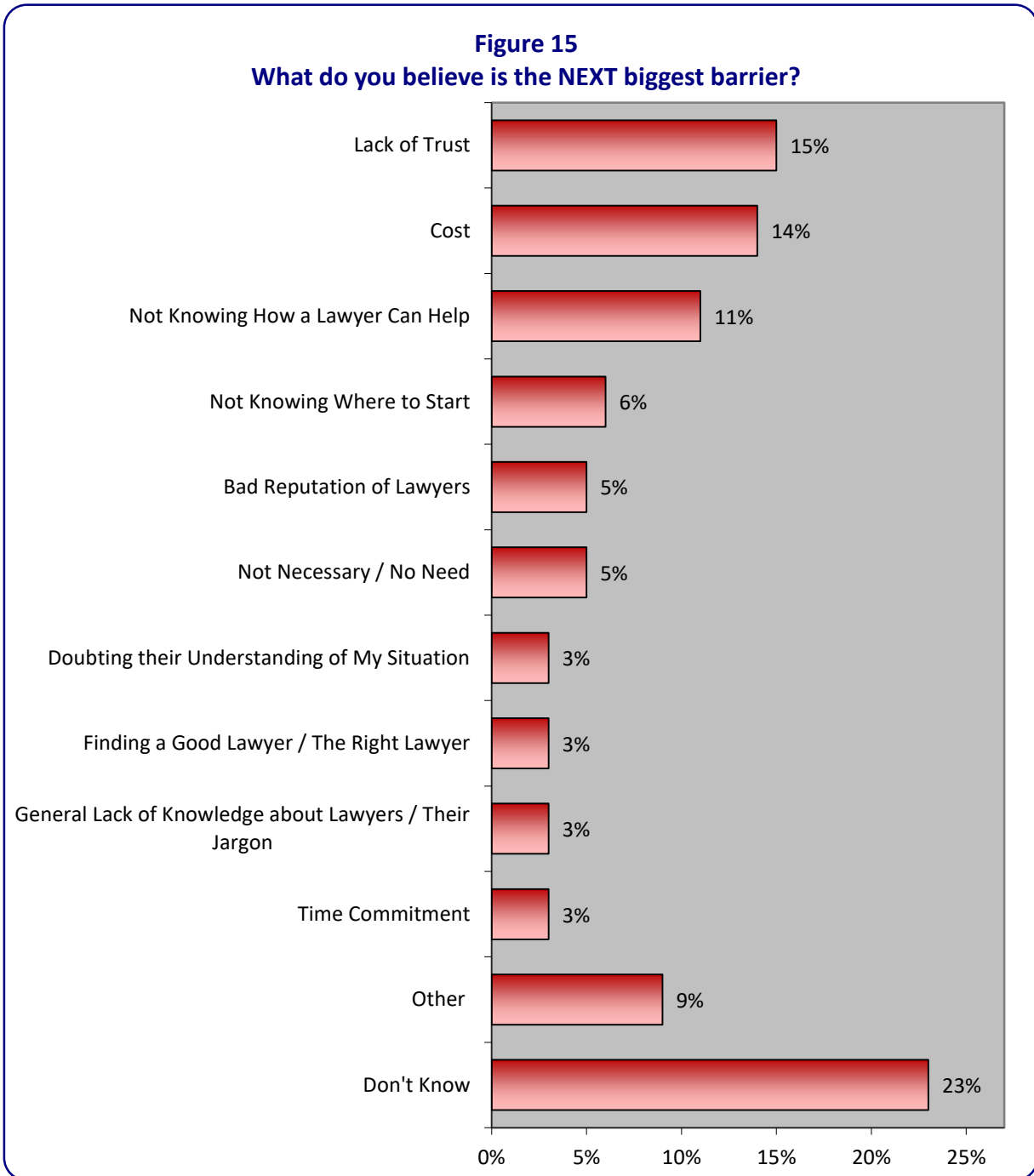


Barriers Preventing Companies from Using a Lawyer

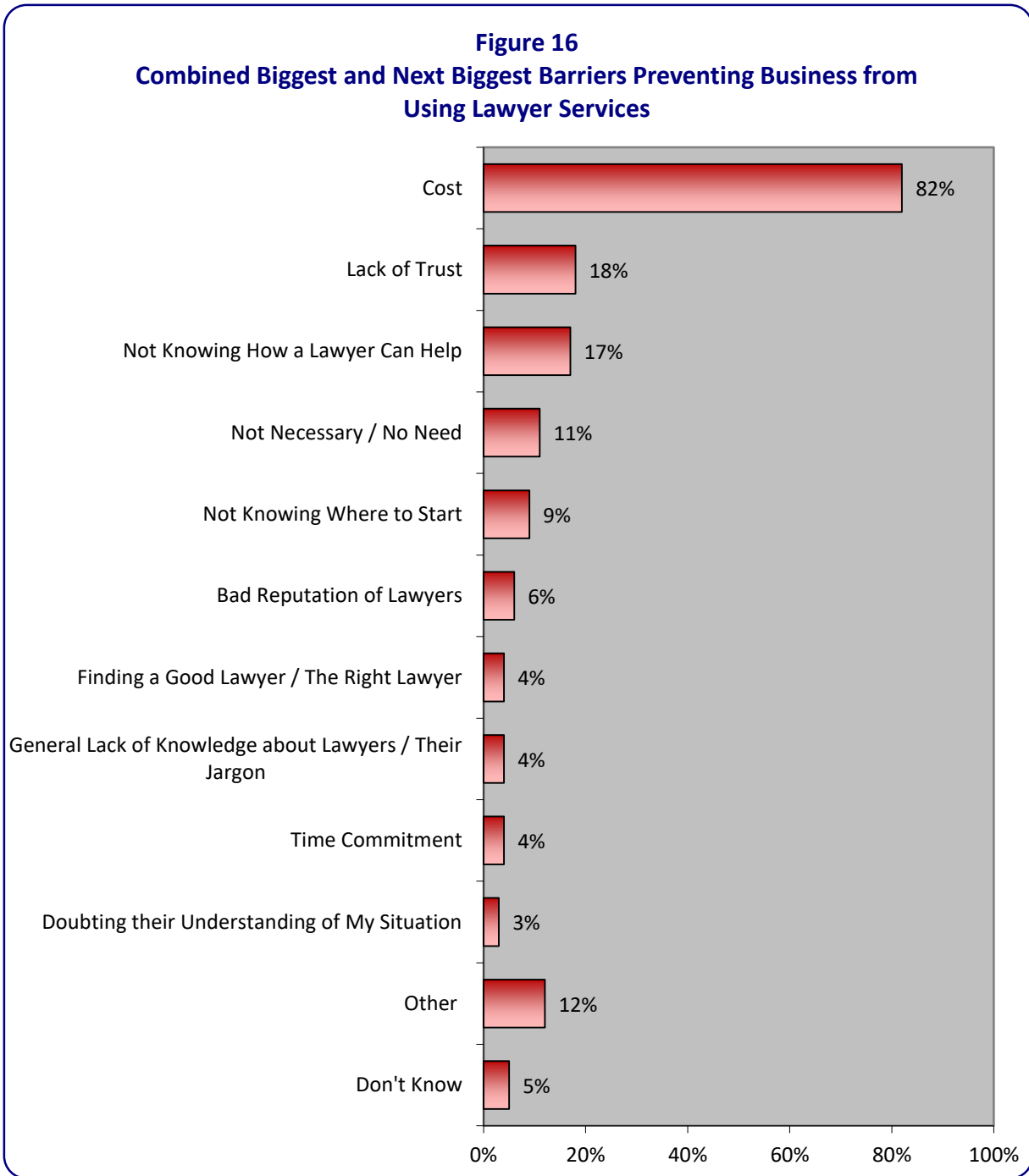
As Figure 14 illustrates, two-thirds of respondents (69%) identified “cost” as the biggest barrier preventing businesses from using the services provided by a lawyer.



When asked to identify the second biggest barrier to businesses using a lawyer, 15% of respondents mentioned a “lack of trust” in lawyers, while 11% said that businesses are unaware of how a lawyer can help. Please see Figure 15.

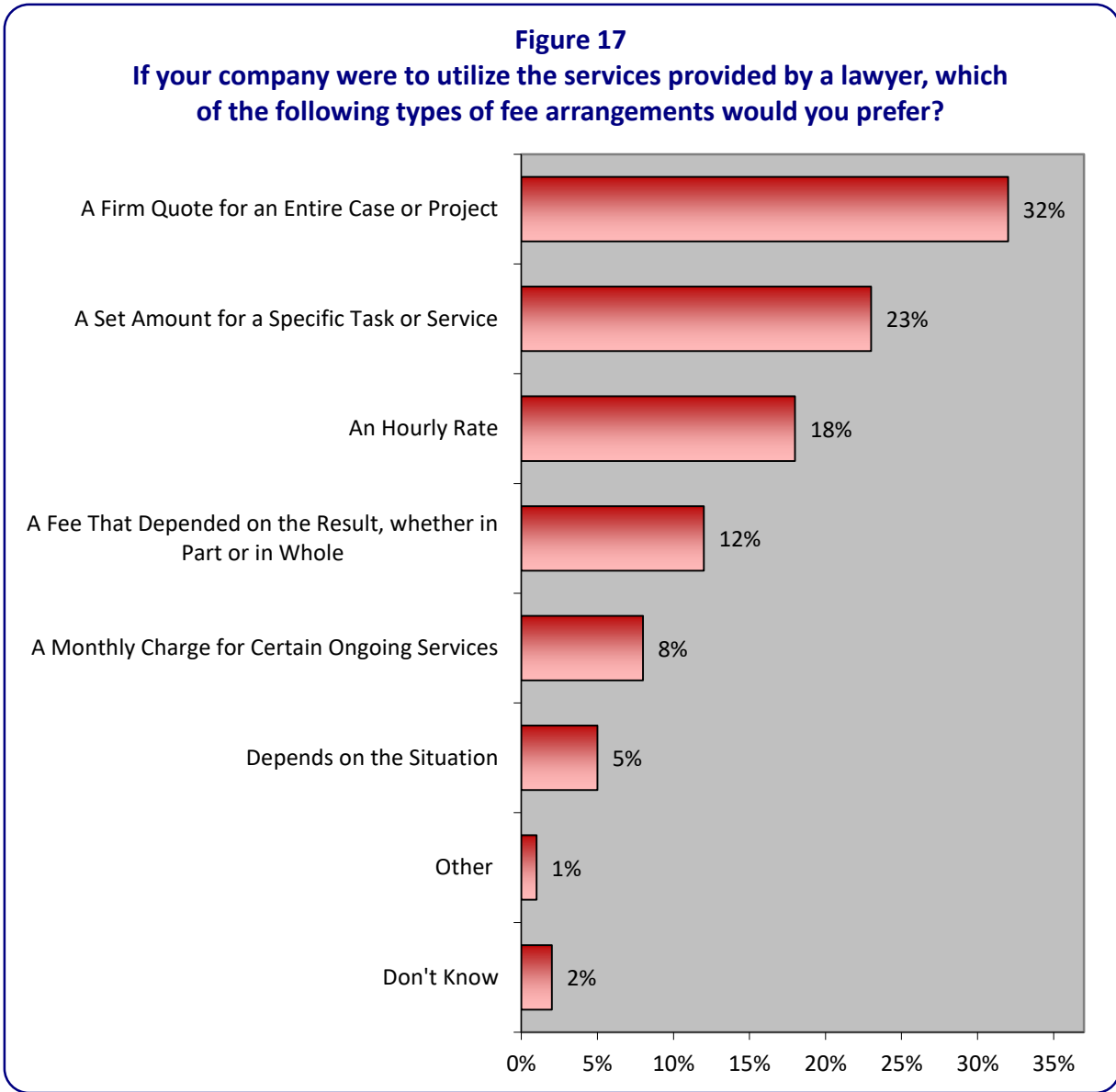


Overall, 82% of respondents identified “cost” as a barrier preventing businesses from utilizing the services of a lawyer. Please refer to Figure 16.

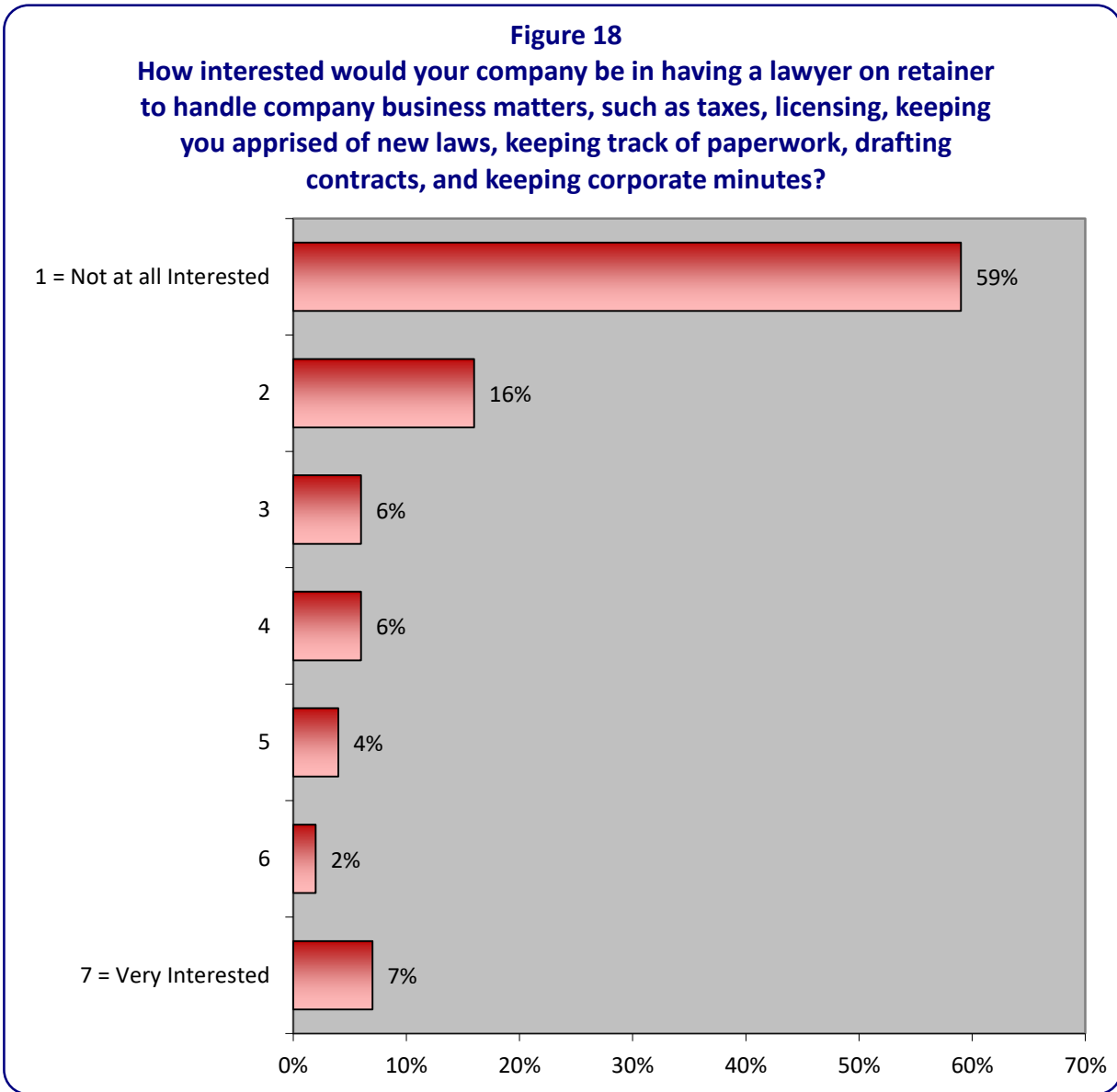


Fee Preference

When asked which fee arrangement they would prefer for their business, one-third of respondents (32%) said they would prefer “a firm quote for an entire case or project,” while 23% said they would prefer “a set amount for “a specific task or service.” Nearly one-fifth of respondents (18%) said they would prefer an hourly rate. See Figure 17.



As Figure 18 illustrates, 59% of respondents said their company would be “not at all interested” in having a lawyer on retainer to handle their business needs. Respondents, on average, gave a rating of 2.11 on the one-to-seven rating scale to describe their interest in having a lawyer on retainer for their business.



Respondent Demographics

As Figure 19 illustrates, 66% of respondents were men, while 34% of respondents were women.

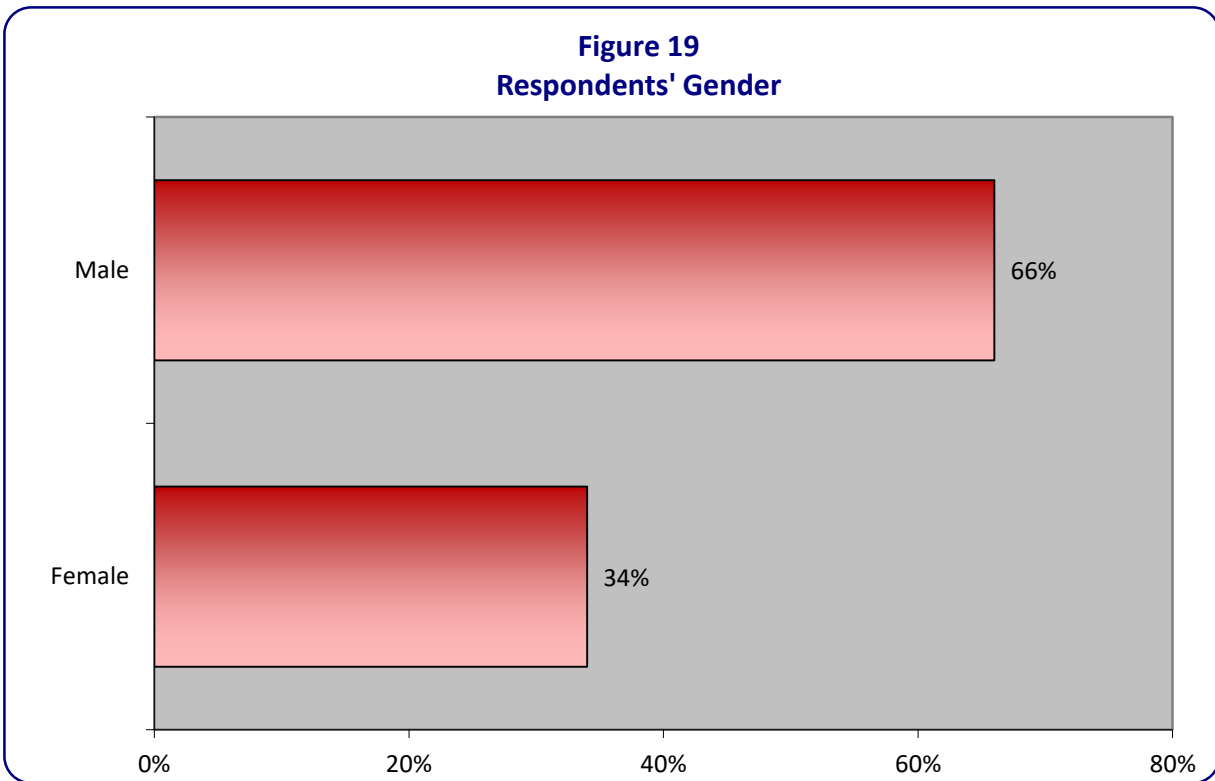
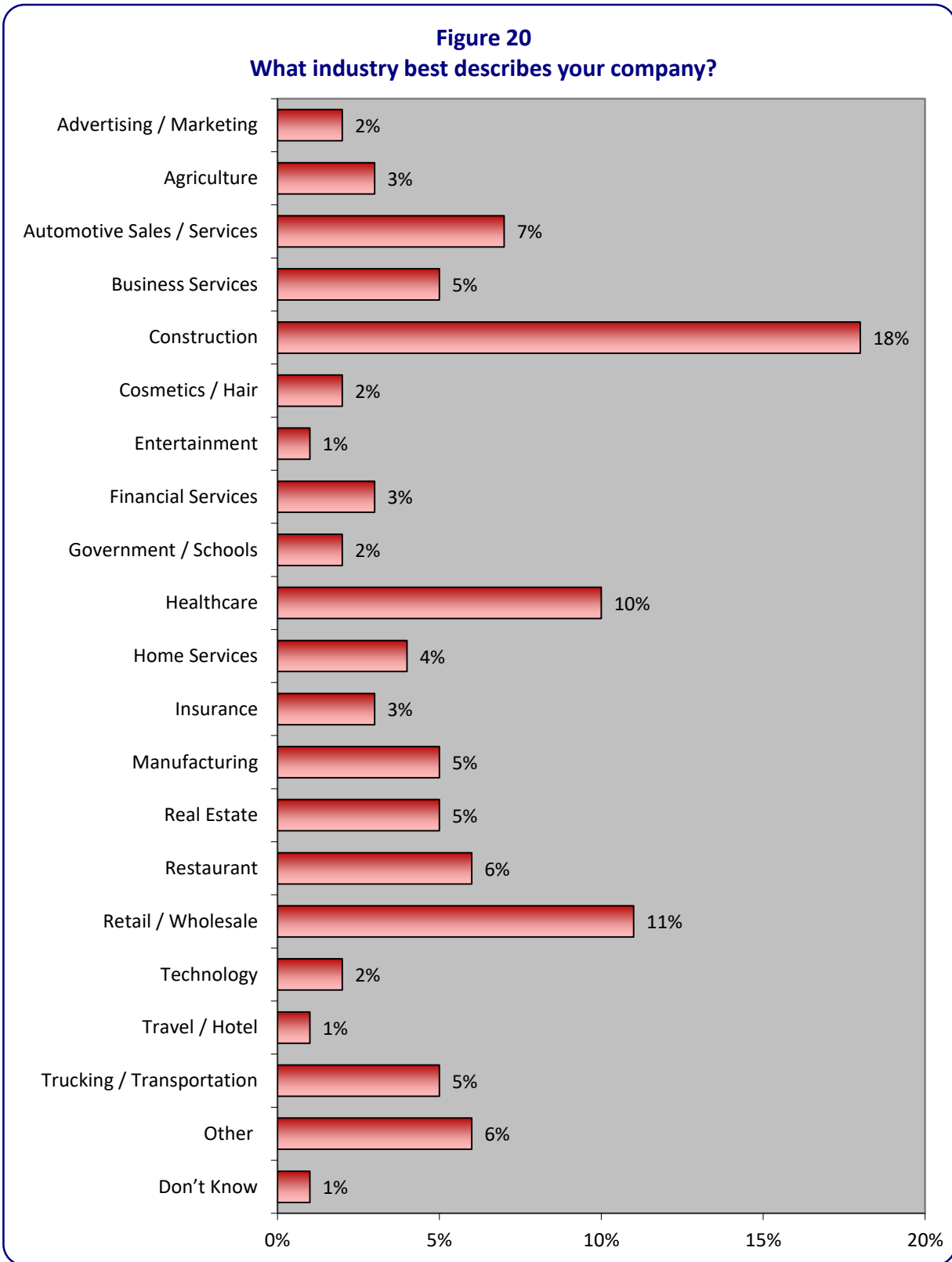
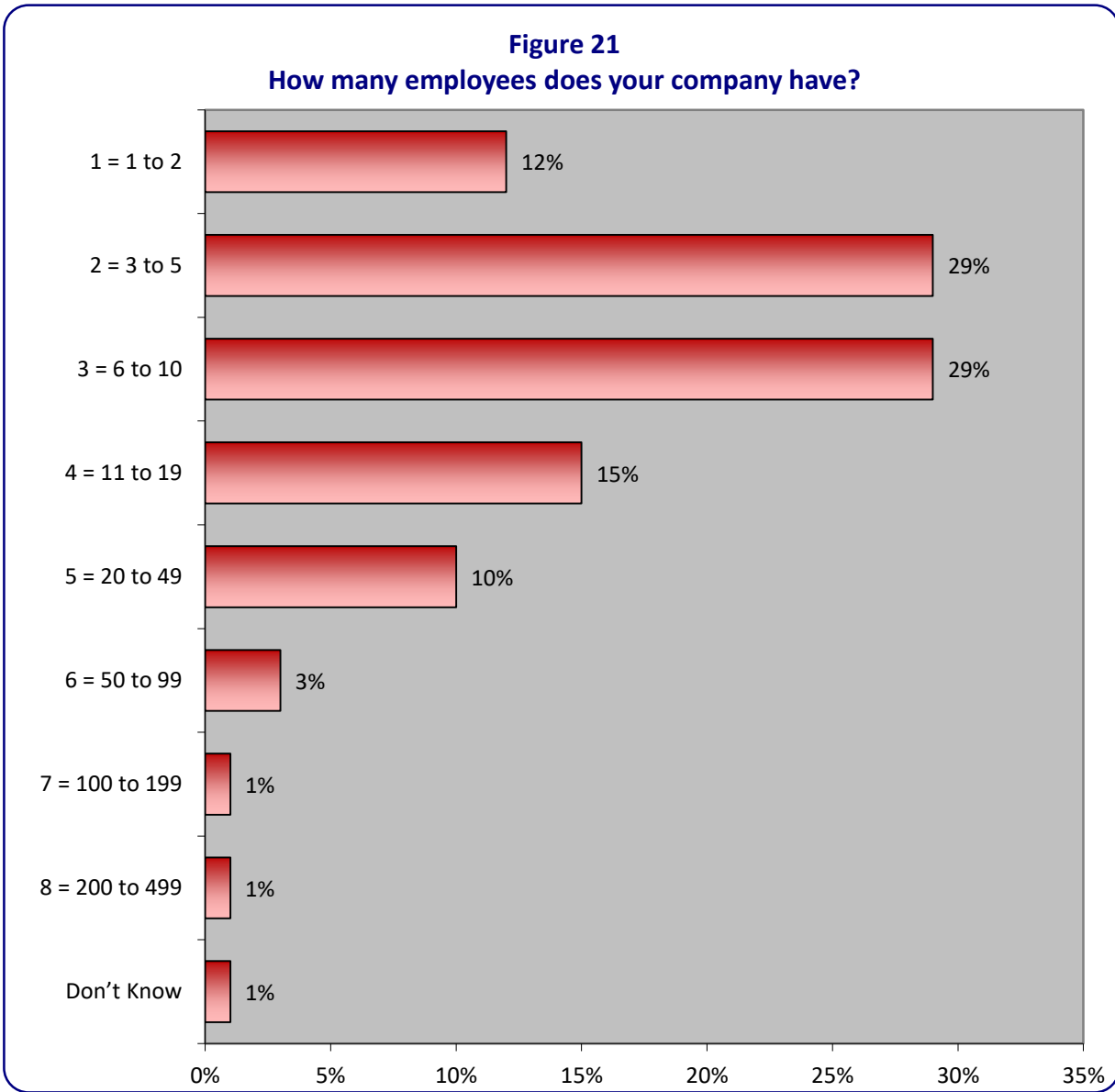


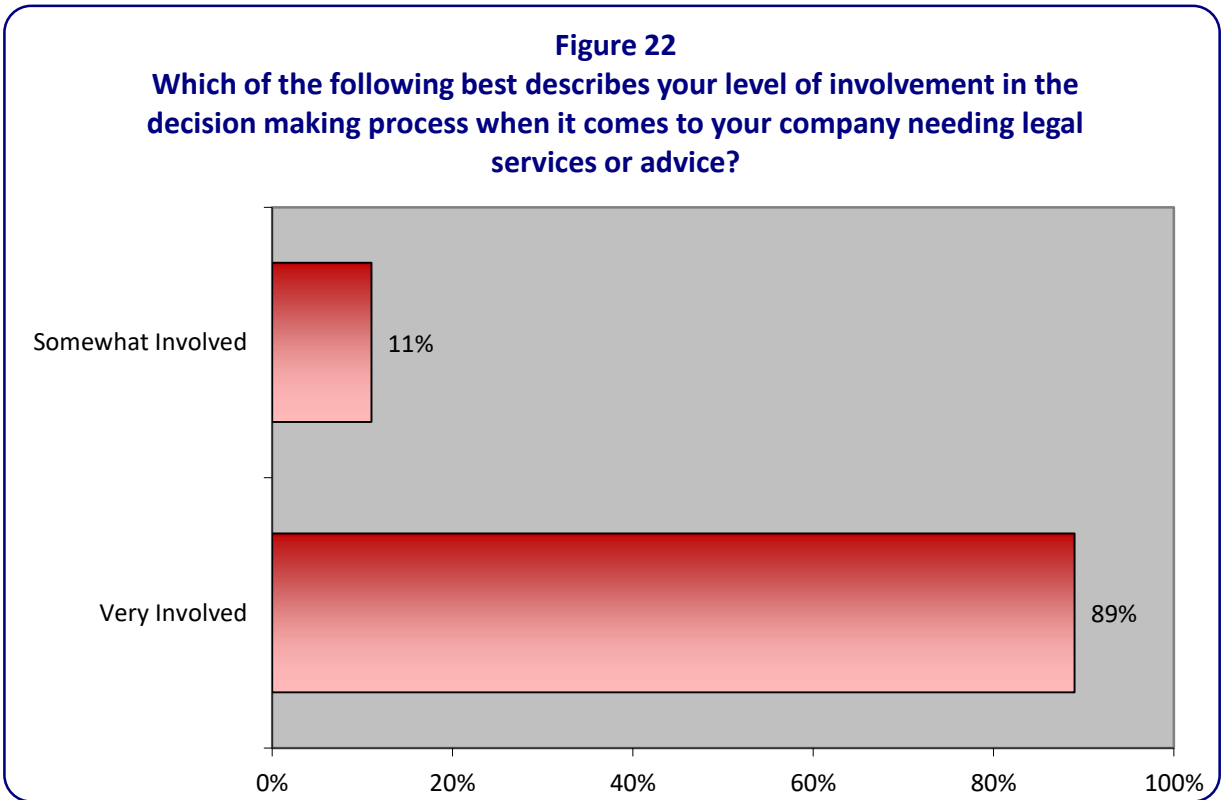
Figure 20 illustrates the percentage of businesses within each industry.



As Figure 21 illustrates, 29% of respondents *each* reported having three to five or six to ten employees in their companies. On average, respondents reported having six to ten employees (3.01 average mean, 3.00 median).



As Figure 22 illustrates, 89% of respondents reported being “very involved” in the decision making process at their companies, while 11% reported being “somewhat involved.”



As Figure 23 illustrates, 50% of respondents reported having a company revenue of less than \$1 million, while 38% reported having a company revenue of \$1 to \$5 million. The average respondent reported having a company revenue of less than \$1 million (1.63 average mean, 1.00 median).

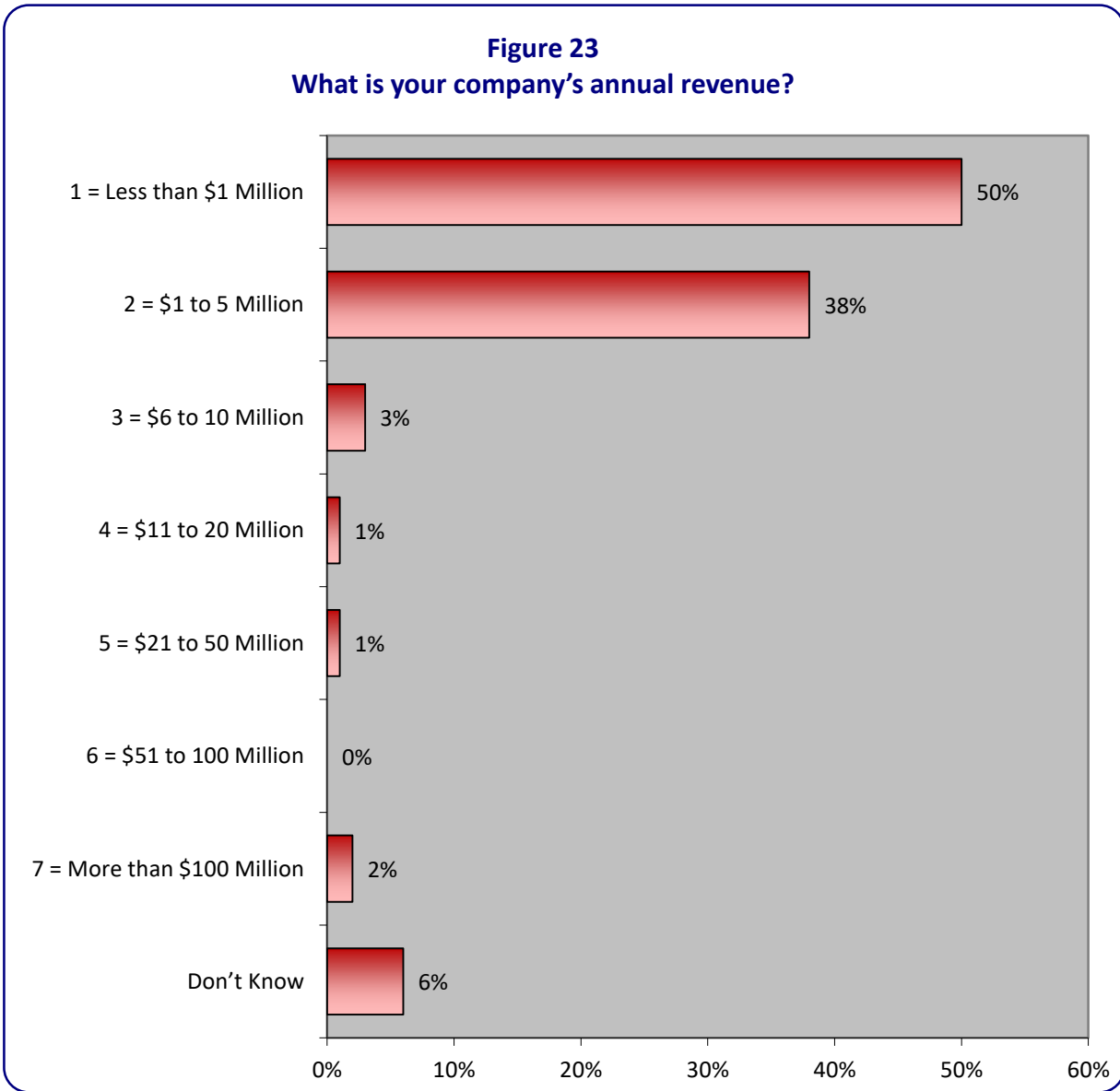
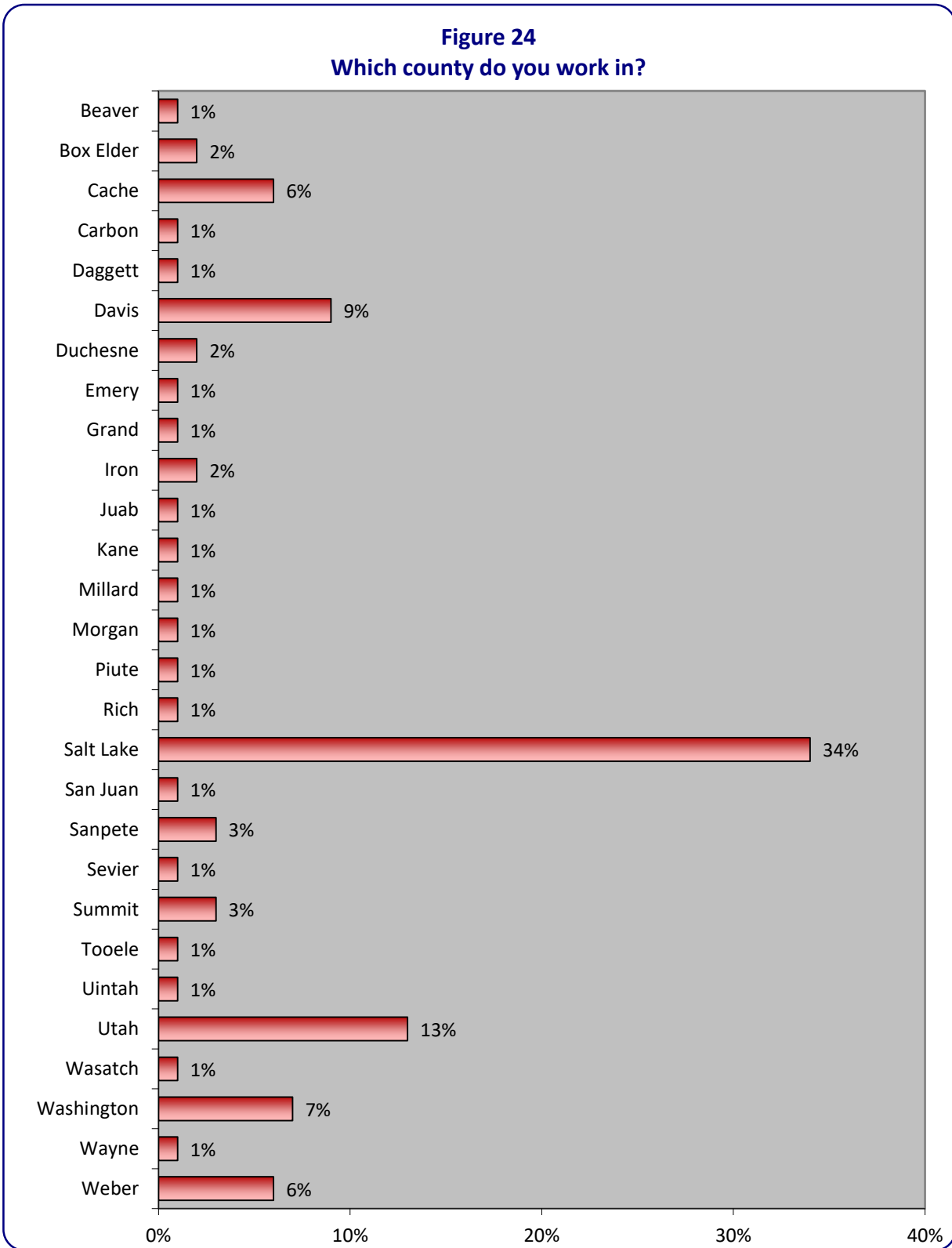


Figure 24 illustrates the percentage of businesses within each county in Utah.



Segment Analysis

In this section of the report, similarities and differences among segments within the survey population are examined. The following descriptions and charts present the statistically significant differences among respondents by segment. These include the following:

- Gender
- Number of Employees
- Area
- Industry
- Company's Annual Revenue
- Job Title
- Whether or Not Their Company Has Ever Used a Lawyer

Statistical significance is defined as a difference in value that is too large to be attributed to chance alone, thus describing the relationship that exists between the demographic variable of interest and the survey responses.

Segment Analysis by Gender

This portion of the analysis examines significant differences between male and female respondents.

Starting a Business

- Men (26%) were more likely than women (14%) to say they would not seek advice if their company needed assistance starting a new business.
- In contrast, women (25%) were more likely than men (13%) to say they don't know where they would go for assistance.

Impression of Lawyers: In general, women (5.15 average mean) had a more positive impression of lawyers than did men (4.59).

Segment Analysis by Number of Employees

In this section of the report, companies were split into three categories based on how many employees they had: small (5 or fewer employees), medium (6-10 employees), and large (more than 10 employees).

Involvement in Legal Decisions: Respondents from small companies (97%) were more likely than respondents from medium (84%) and large companies (83%) to be very involved in the decision-making process when it comes to legal services or advice.

Employee Procedures or Problems

- Respondents from large companies (12%) were more likely than respondents from small companies (1%) to say they would go to their “HR Department” if they needed assistance with employee procedures or problems.
- Likewise, respondents from medium companies (31%) and large companies (31%) were more likely than respondents from small companies (16%) to say they would go to a “lawyer” if they needed assistance with employee procedures or problems.
 - Also, respondents from large companies (19%) were more likely than respondents from small companies (5%) to say that “employee procedures or problems” is a situation for which their company might use a lawyer.

Have Used a Lawyer: Respondents from medium (77%) and large companies (80%) were more likely than respondents from small companies (58%) to say their company has previously used the services of a lawyer.

Where Respondents Would Go to Find a Lawyer: When asked where they would go if their company needed the assistance of a lawyer today, respondents from large companies (46%) were more likely than respondents from small companies (23%) to say their company “already has a lawyer.”

Impression of Lawyers: In general, respondents from large companies (5.33 average mean) had a more positive impression of lawyers than did respondents from medium (4.73) and small companies (4.44).

Interest in Having a Lawyer on Retainer: On average, respondents from large companies (2.66 average mean) were more interested in having a lawyer on retainer to handle their company’s business matters than were respondents from small companies (1.70).

Segment Analysis Table 1 shows the differences between respondents in small, medium, and large companies when it came to their likelihood of using a lawyer for various situations. In general, larger companies gave a higher likelihood than smaller companies to using a lawyer in many of the situations.

SEGMENT ANALYSIS TABLE 1
Likelihood of Using a Lawyer for Various Situations

Statistically Higher Averages Are Highlighted in Green

Statistically Lower Averages Are Highlighted in Red

	Small	Medium	Large
Copyright, Trademark, or Patent Issues	4.97	5.23	5.45
Employee Procedures or Problems	2.77	3.44	3.71
Lending or Other Debt Related Issues	2.70	3.26	3.44
Licensing Needs	2.83	3.61	3.79
Privacy and Data Protection	2.90	3.43	3.78
Purchase or Sale of the Business	4.48	5.15	5.94
Real Estate Needs, Including Leases	3.36	3.63	3.87
Regulation or Compliance Issues	3.44	3.79	4.37
Starting a New Business	3.26	4.18	4.35
Tax Rules and Requirements	2.93	3.00	2.89
Write or Negotiate Contract	4.26	4.82	5.30

Area Differences

In this section of the report, companies were split into three categories based on the area in which they work:

- Salt Lake County
- Davis, Utah, Weber Counties
- Non-Wasatch Front Counties

Writing or Negotiating a Contract: Companies along the Wasatch Front (22%) were more likely than companies in non-Wasatch Front counties (7%) to say they would NOT seek advice if their company needed assistance writing or negotiating a contract.

Segment Analysis by Industry

In this section of the report, companies were split into four categories based on the general industry they are in:

- Business/Finance/Technology Industries
- Blue Collar Industries (Agriculture, Construction, Manufacturing, Oil/Gas/Mining, and Trucking/Transportation)
- Customer Services (Arts/Entertainment/Recreation, Restaurant, Retail, Travel/Hotel)
- Government/Education/Healthcare/Insurance

Starting a New Business

- Respondents in blue collar industries (34%) were more likely than respondents in business/financial/technology industries (7%) and customer services (13%) to say they would go to a “financial advisor” for assistance if their company needed help starting a new business.

Segment Analysis Table 2 shows the differences between respondents in different industries when it came to their likelihood of using a lawyer for various situations. In general, larger companies seemed to give a higher likelihood than smaller companies to using a lawyer in many of the situations.

SEGMENT ANALYSIS TABLE 2
Likelihood of Using a Lawyer for Various Situations

Statistically Higher Averages Are Highlighted in Green
Statistically Lower Averages Are Highlighted in Red

	Business/ Financial/ Technology	Blue Collar	Customer Services	Government/ Education/ Healthcare/ Insurance
Copyright, Trademark, or Patent Issues	5.37	4.95	5.09	5.78
Employee Procedures or Problems	3.23	3.18	3.12	3.37
Lending or Other Debt Related Issues	2.81	2.94	3.20	3.38
Licensing Needs	2.67	3.03	3.94	3.47
Privacy and Data Protection	3.11	3.20	3.45	3.51
Purchase or Sale of the Business	5.30	4.94	5.28	5.29
Real Estate Needs, Including Leases	2.85	3.27	3.81	4.40
Regulation or Compliance Issues	3.67	3.66	3.97	4.10
Starting a New Business	3.52	3.61	4.33	4.32
Tax Rules and Requirements	2.44	2.65	3.33	2.93
Write or Negotiate Contract	4.04	4.28	5.07	5.58

Segment Analysis by Company’s Yearly Revenue

In this section of the report, companies were split into two categories based on their annual revenue: less than \$1 million or more than \$1 million.

Purchase or Sale of the Business: Respondents from companies with less than \$1 million in revenue (12%) were more likely than respondents from companies with more than \$1 million in revenue (2%) to say they would go to “family, friends, or coworkers” for assistance if their company needed help with the purchase or sale of the business.

Lending or Other Debt Related Issues: Respondents from companies with more than \$1 million in revenue (16%) were more likely than respondents from companies with less than \$1 million in revenue (5%) to say “lending or other debt related issues” is a situation where their company might use a lawyer.

Have Used a Lawyer: 84% of companies with more than \$1 million in revenue have used the services of a lawyer, compared to only 62% of companies with less than \$1 million in revenue.

Where Respondents Would Go to Find a Lawyer: When asked where they would go if their company needed the assistance of a lawyer today, respondents from companies with more than \$1 million in revenue (48%) were more likely than respondents from companies with less than \$1 million in revenue (24%) to say their company already has a lawyer.

Segment Analysis Table 3 shows the differences between companies with lower or higher revenues when it came to their likelihood of using a lawyer for various situations.

SEGMENT ANALYSIS TABLE 3
Likelihood of Using a Lawyer for Various Situations
Statistically Higher Averages Are Highlighted in Green

	Less than \$1 Million	More than \$1 Million
Copyright, Trademark, or Patent Issues	5.19	5.39
Employee Procedures or Problems	3.09	3.66
Lending or Other Debt Related Issues	2.90	3.27
Licensing Needs	2.99	3.82
Privacy and Data Protection	3.24	3.60
Purchase or Sale of the Business	4.76	5.51
Real Estate Needs, Including Leases	3.46	3.83
Regulation or Compliance Issues	3.58	4.19
Starting a New Business	3.65	4.24
Tax Rules and Requirements	2.89	3.12
Write or Negotiate Contract	4.33	5.12

Segment Analysis by Job Title

In this section of the report, respondents were segmented in to two groups based on whether they are considered a Top Executive (owner/president/partner/CEO) or Lower-Level Employee (manager/vice president/etc.).

Involvement in Legal Decisions: Top Executives (96%) were more likely than Lower-Level Employees (73%) to be very involved in the decision-making process when it comes to legal services or advice.

- In contrast, 27% of Lower-Level Employees said they are only somewhat involved in decisions about legal services, compared to only 4% of Top Executives.

Purchase or Sale of the Business

- Lower-Level Employees (23%) were more likely than Top Executives (10%) to say they would go to a “financial advisor” if their company needed assistance with the purchase or sale of the business.
- In contrast, Top Executives (15%) were more likely than Lower-Level Employees (6%) to say they would go to a “real estate agent.”

Starting a New Business: Lower-Level Employees (10%) were more likely than Top Executives (3%) to say they would go to “friends, family members, or coworkers” if their company needed assistance starting a new business.

Writing or Negotiating a Contract: Lower-Level Employees (10%) were more likely than Top Executives (3%) to say they would go to a “financial advisor” if their company needed assistance writing or negotiating a contract.

Where Respondents Would Go to Find a Lawyer: When asked where they would go if their company needed the assistance of a lawyer today, Lower-Level Employees (51%) were more likely than Top Executives (27%) to say their company “already has a lawyer.”

Copyright, Trademark, or Patent Issues: In general, Top Executives (5.35 average mean) gave a higher average rating to the likelihood of their company using a lawyer for “copyright, trademark, or patent issues” than did Lower-Level Employees (4.84).

Tax Rules and Requirements: In general, Lower-Level Employees (3.43 average mean) gave a higher average rating to the likelihood of their company using a lawyer for “tax rules and requirements” than did Top Executives (2.70).

Interest in Having a Lawyer on Retainer: In general, Lower-Level Employees (2.53 average mean) were more interested in having a lawyer on retainer to handle their company’s business matters than were Top Executives (1.87).

Segment Analysis by Whether or Not Their Company Has Ever Used a Lawyer

In this portion of the analysis respondents were segmented into two groups based on whether or not their company has ever used the services provided by a lawyer.

Segment Analysis Table 4 shows the differences between respondents at companies that have previously used a lawyer and respondents at companies that have not, when it came to where they would go if they needed assistance in various situations. For each scenario, respondents at companies that have previously used a lawyer were more likely to say they would use a lawyer.

SEGMENT ANALYSIS TABLE 4
Where Respondents Would Go for Assistance in Various Situations
Statistically Higher Percentages Are Highlighted in Green

		Have Used a Lawyer	Have NOT Used a Lawyer
Employee Procedures or Problems	Friend, Family, Co-worker	9%	13%
	Lawyer	31%	8%
	Would NOT Seek Advice	26%	27%
	Don't Know	7%	24%
The Purchase or Sale of the Business	Friend, Family, Co-worker	6%	11%
	Financial Advisor	13%	15%
	Lawyer	40%	18%
	Real Estate Agent	12%	11%
	Don't Know	20%	26%
Starting a New Business	Financial Advisor	22%	13%
	Lawyer	34%	10%
	Internet	5%	11%
	Would NOT Seek Advice	20%	26%
	Don't Know	12%	27%
Tax Rules and Requirements	Friend, Family, Co-worker	3%	10%
	Financial Advisor	78%	77%
	Lawyer	14%	2%
Writing or Negotiating a Contract	Friend, Family, Co-worker	4%	13%
	Lawyer	69%	37%
	Would NOT Seek Advice	14%	21%
	Don't Know	5%	16%

Situations for Using a Lawyer: Respondents at companies that have used a lawyer (23%) were more likely than those who have not used a lawyer (8%) to say their company might use a lawyer to help “write or negotiate a contract.”

- Overall, 23% of respondents at companies that have NOT used a lawyer said they don’t know of any situations which their company might use a lawyer. This is compared to only 3% of respondents at companies that have previously used a lawyer.

Segment Analysis Table 5 shows the differences between respondents at companies that have previously used a lawyer and respondents at companies that have not, when it came to where they would go if their company needed the assistance of a lawyer today.

SEGMENT ANALYSIS TABLE 5
Where Respondents Would Go if Their Company Needed a Lawyer Today
Statistically Higher Percentages Are Highlighted in Green

	Have Used a Lawyer	Have NOT Used a Lawyer
Already Have a Lawyer	44%	12%
Personally Know a Lawyer	29%	23%
Internet Search / Google	10%	23%
Referral / Word of Mouth	22%	51%

On average, respondents at companies that have used a lawyer (4.90 average mean) had a more positive impression of lawyers than did respondents at companies that have NOT used a lawyer (4.44).

Segment Analysis Table 6 shows the differences between respondents at companies that have previously used a lawyer and respondents at companies that have not, when it came to their likelihood of using a lawyer for various situations.

SEGMENT ANALYSIS TABLE 6
Likelihood of Using a Lawyer for Various Situations
Statistically Higher Averages Are Highlighted in Green

	Have Used a Lawyer	Have NOT Used a Lawyer
Copyright, Trademark, or Patent Issues	5.43	4.57
Employee Procedures or Problems	3.46	2.79
Lending or Other Debt Related Issues	3.24	2.72
Licensing Needs	3.65	2.55
Privacy and Data Protection	3.43	3.02
Purchase or Sale of the Business	5.37	4.52
Real Estate Needs, Including Leases	3.86	2.97
Regulation or Compliance Issues	3.97	3.38
Starting a New Business	4.24	2.97
Tax Rules and Requirements	3.05	2.73
Write or Negotiate Contract	4.98	4.08

On average, respondents at companies that have used a lawyer (2.34 average mean) gave a higher rating to how interested their company would be in having a lawyer on retainer to handle company business matters, than did respondents at companies that have NOT used a lawyer (1.55).

- *It should be noted, however, that even among respondents at companies who have previously used a lawyer, there was not much of an interest in having a lawyer on retainer. Only 10% of these respondents gave a rating of 6 or 7 to their interest in having a lawyer on retainer.*

APPENDIX A: SURVEY RESULTS

Hello, my name is _____, calling on behalf of The Utah State Bar. We're conducting a survey with Utah business decision makers about their perceptions and usage of legal services. May I ask you some questions?

1. Do you or does anyone in your household work in any of the following industries? Please say yes or no to each.

	Count	%
Education	24	12%
Healthcare	38	19%
Legal Services [Thank & Terminate]	0	0%
Marketing Research	3	2%
None of the Above	140	70%

2. What is your current job title or position in your company? **[Open Ended]**

(For an alphabetized list of verbatim responses, see Appendix B.)

3. Which of the following best describes your level of involvement in the decision making process when it comes to your company needing legal services or advice? Would you say you are...

	Count	%
Not at all Involved [Thank & Terminate]	0	0%
Not Very Involved [Thank & Terminate]	0	0%
Somewhat Involved	25	11%
Very Involved	192	89%

4. Does your company have its own in-house legal department?

	Count	%
Yes [Thank & Terminate]	0	0%
No	217	100%

5. Do you currently work in the state of Utah?

	Count	%
Yes	217	100%
No [Thank & Terminate]	0	0%

6. What county do you WORK in?

	Count	%
Beaver	1	1%
Box Elder	4	2%
Cache	13	6%
Carbon	3	1%
Daggett	2	1%
Davis	20	9%
Duchesne	5	2%
Emery	1	1%
Garfield	0	0%
Grand	1	1%
Iron	4	2%
Juab	1	1%
Kane	2	1%
Millard	1	1%
Morgan	1	1%

	Count	%
Piute	1	1%
Rich	1	1%
Salt Lake	73	34%
San Juan	3	1%
Sanpete	7	3%
Sevier	2	1%
Summit	6	3%
Tooele	3	1%
Uintah	3	1%
Utah	28	13%
Wasatch	3	1%
Washington	15	7%
Wayne	1	1%
Weber	12	6%

7. Record gender by observation.

	Count	%
Male	144	66%
Female	73	34%

8. First, I would like to ask you where or who would you go to if your company needed assistance with each of the following? Where or who would you go to if you needed assistance with...

Employee Procedures or Problems

	Count	%
Lawyer	54	25%
Friend, Family Member, Coworker	22	10%
HR Department	13	6%
Financial Advisor / Account / CPA	10	5%
Internet (specify)	10	5%
Handle It Internally, In General	8	4%
Other (Specify)	17	8%
I Would NOT Seek Advice / I Would Deal with It Myself	57	26%
Don't Have Employees	5	2%
Don't Know	26	12%

(For a list of verbatim 'other' responses, see Appendix D.)

The Purchase or Sale of the Business

	Count	%
Lawyer	72	33%
Financial Advisor / Account / CPA	30	14%
Real Estate Agent	27	12%
Friend, Family Member, Coworker	16	7%
Internet (specify)	5	2%
Other (Specify)	12	6%
I Would NOT Seek Advice / I Would Deal with It Myself	15	7%
Don't Know	47	22%

(For a list of verbatim 'other' responses, see Appendix D.)

Starting a New Business

	Count	%
Lawyer	58	27%
Financial Advisor / Account / CPA	42	19%
Internet (specify)	14	7%
Friend, Family Member, Coworker	11	5%
Other (Specify)	16	7%
I Would NOT Seek Advice / I Would Deal with It Myself	47	22%
Don't Know	37	17%

(For a list of verbatim 'other' responses, see Appendix D.)

Tax Rules and Requirements

	Count	%
Financial Advisor / Account / CPA	169	78%
Lawyer	23	11%
Friend, Family Member, Coworker	11	5%
Internet (specify)	4	2%
Other (Specify)	7	3%
I Would NOT Seek Advice / I Would Deal with It Myself	9	4%
Don't Know	3	1%

(For a list of verbatim 'other' responses, see Appendix D.)

Writing or Negotiating a Contract

	Count	%
Lawyer	129	59%
Friend, Family Member, Coworker	15	7%
Financial Advisor / Account / CPA	11	5%
Handle It Internally (in general)	5	2%
Internet (specify)	4	2%
Other (Specify)	5	2%
I Would NOT Seek Advice / I Would Deal with It Myself	35	16%
Don't Know	17	8%

(For a list of verbatim 'other' responses, see Appendix D.)

9. For what situations might your company use a lawyer?

	Count	%
Being Sued / Legal Action Taken Against Me	53	24%
Write or Negotiate a Contract	40	18%
Employee Procedures or Problems	25	12%
Lending or Other Debt Related Issues	23	11%
Purchase or Sale of the Business	20	9%
Legal Matter (in general)	13	6%
Copyright, Trademark, or Patent Issues	12	6%
Real Estate Needs, Including Leases	9	4%
Regulation or Compliance Issues	9	4%
Tax Rules and Requirements	8	4%
Privacy and Data Protection	7	3%
Starting a New Business	7	3%
Liability Issues	6	3%
Accident / Injury	6	3%
Never Needed One / Don't Need One	6	3%
Malpractice	3	1%
Licensing Needs	2	1%
Other (Specify)	34	16%
Don't Know	19	9%

(For a list of verbatim 'other' responses, see Appendix D.)

10. Has your company ever used the services of a lawyer before?

	Count	%
Yes	153	71%
No	62	29%
Don't Remember	2	1%

11. If "yes" in Q10, ASK: Where or how did you find that lawyer?

	Count	%
Word of Mouth (Friend, Family, Co-worker)	79	52%
I Personally Know the Lawyer	44	29%
I've Used This Lawyer or Law Firm Before	14	9%
Internet Search / Google	10	7%
Through Another Business (Realtor, Broker, Financial Advisor, etc.)	7	5%
They Were Assigned to Me by the Court	1	1%
Advertising (TV, Radio, Newspaper, Billboards, etc.)	0	0%
Other (Specify)	7	5%
Don't Remember	3	2%

(For a list of verbatim 'other' responses, see Appendix D.)

12. If “yes” in Q10, ASK: What was the situation your company used a lawyer for most recently? (Unaided)

	Count	%
Lending or Other Debt Related Issues	20	13%
Purchase or Sale of the Business	16	11%
Copyright, Trademark, or Patent Issues	13	9%
Real Estate Needs, Including Leases	12	8%
Write or Negotiate a Contract	12	8%
Employee Procedures or Problems	8	5%
Lawsuit	7	5%
Tax Rules and Requirements	4	3%
Contract Dispute	4	3%
Accident	4	3%
Regulation or Compliance Issues	3	2%
Partnership	3	2%
Changing the Company Type	3	2%
Starting a New Business	2	1%
Licensing Needs	1	1%
Privacy and Data Protection	1	1%
Other (Specify)	32	21%
Don't Remember	5	3%

(For a list of verbatim ‘other’ responses, see Appendix D.)

13. If “yes” in Q10, ASK: What was the **MAIN** reason your company decided to hire a lawyer in that situation, rather than handling the situation by yourself or through other means? **[Open Ended]**

	Count	%
To Ensure Matter was Taken Care of Properly / Legally	23	15%
Situation was Beyond What Company Could Handle Itself	22	14%
Legal Knowledge / Expertise Lawyer Provides	18	12%
Situation / Lawsuit / Mediation Required a Lawyer	16	10%
Needed Advice / Consultation	9	6%
Respect / Security that Comes with a Lawyer	9	6%
Write a Legal Document / Contract	8	5%
Complexity of Situation	7	5%
Debt Collection	6	4%
Felt Compelled To, Based on Other Party's Size / Behavior	5	3%
Liability	3	2%
Other Party Had a Lawyer	3	2%
Timeliness	3	2%
Had a Lawyer on Retainer	2	1%
Miscellaneous Responses	15	10%
Don't Know / Wouldn't Say	4	3%

(For a list of verbatim responses, see Appendix C.)

14. Imagine your company needed the assistance of a lawyer today. Where would you go to find a lawyer?

	Count	%
I Already Have a Lawyer	75	35%
Referral / Word of Mouth (Friend, Family, Coworker)	65	30%
I Personally Know a Lawyer	58	27%
Internet Search / Google	29	13%
Rating or Review Website	1	1%
Other (Specify)	13	6%
Don't Know	1	1%

(For a list of verbatim 'other' responses, see Appendix D.)

15. Using a one-to-seven rating scale where one is "very negative," seven is "very positive," and four is "neutral," please rate your impression of lawyers.

	Count	%
1 = Very Negative	8	4%
2	6	3%
3	15	7%
4 = Neutral	69	32%
5	40	19%
6	46	22%
7 = Very Positive	28	13%
<i>Average Mean</i>	4.78	
<i>Median</i>	5.00	
Don't Know	2	1%

16. I am now going to read you a list of various situations individuals may find themselves in, and I would like you to rate how likely you would be to use a lawyer if you were in each of those situations. Please use a one-to-seven scale where one is "not at all likely" and seven is "very likely."

Copyright, Trademark, or Patent Issues

	Count	%
1 = Not at all Likely	34	16%
2	8	4%
3	7	3%
4	14	7%
5	19	9%
6	38	18%
7 = Very Likely	94	43%
<i>Average Mean</i>	5.18	
<i>Median</i>	6.00	
Don't Know	3	1%

Employee Procedures or Problems

	Count	%
1 = Not at all Likely	63	29%
2	31	14%
3	21	10%
4	43	20%
5	25	12%
6	9	4%
7 = Very Likely	23	11%
<i>Average Mean</i>	3.26	
<i>Median</i>	3.00	
Don't Know	2	1%

Lending or Other Debt Related Issues

	Count	%
1 = Not at all Likely	75	35%
2	25	12%
3	29	13%
4	34	16%
5	20	9%
6	11	5%
7 = Very Likely	22	10%
<i>Average Mean</i>	3.09	
<i>Median</i>	3.00	
Don't Know	1	1%

Licensing Needs

	Count	%
1 = Not at all Likely	73	34%
2	22	10%
3	17	8%
4	33	15%
5	25	12%
6	9	4%
7 = Very Likely	33	15%
<i>Average Mean</i>	3.35	
<i>Median</i>	3.00	
Don't Know	4	2%

Privacy and Data Protection

	Count	%
1 = Not at all Likely	67	31%
2	22	10%
3	26	12%
4	37	17%
5	27	12%
6	14	7%
7 = Very Likely	23	11%
<i>Average Mean</i>	3.32	
<i>Median</i>	3.00	
Don't Know	1	1%

Purchase or Sale of the Business

	Count	%
1 = Not at all Likely	26	12%
2	10	5%
3	13	6%
4	29	13%
5	21	10%
6	25	12%
7 = Very Likely	93	43%
<i>Average Mean</i>	5.10	
<i>Median</i>	6.00	
Don't Know	0	0%

Real Estate Needs, Including Leases

	Count	%
1 = Not at all Likely	61	28%
2	20	9%
3	27	13%
4	26	12%
5	31	14%
6	20	9%
7 = Very Likely	30	14%
<i>Average Mean</i>	3.59	
<i>Median</i>	3.00	
Don't Know	1	1%

Regulation or Compliance Issues

	Count	%
1 = Not at all Likely	49	23%
2	14	7%
3	29	13%
4	40	18%
5	31	14%
6	24	11%
7 = Very Likely	29	13%
<i>Average Mean</i>	3.82	
<i>Median</i>	4.00	
Don't Know	1	1%

Starting a New Business

	Count	%
1 = Not at all Likely	55	25%
2	25	12%
3	12	6%
4	38	18%
5	24	11%
6	17	8%
7 = Very Likely	46	21%
<i>Average Mean</i>	3.86	
<i>Median</i>	4.00	
Don't Know	0	0%

Tax Rules and Requirements

	Count	%
1 = Not at all Likely	89	41%
2	16	7%
3	26	12%
4	32	15%
5	24	11%
6	14	7%
7 = Very Likely	15	7%
<i>Average Mean</i>	2.94	
<i>Median</i>	3.00	
Don't Know	1	1%

Write or Negotiate a Contract

	Count	%
1 = Not at all Likely	31	14%
2	16	7%
3	20	9%
4	20	9%
5	27	12%
6	31	14%
7 = Very Likely	71	33%
<i>Average Mean</i>	4.73	
<i>Median</i>	5.00	
Don't Know	1	1%

17. What do you believe is the biggest barrier preventing businesses from using services provided by a lawyer?

	Count	%
Cost	149	69%
Not Knowing How a Lawyer Can Help	14	7%
Not Necessary / No Need	12	6%
Not Knowing Where to Start	7	3%
Lack of Trust	7	3%
Bad Reputation of Lawyers	2	1%
General Lack of Knowledge about Lawyers / Their Jargon	2	1%
Finding a Good Lawyer / The Right Lawyer	1	1%
Time Commitment	1	1%
Doubting their Understanding of My Situation	1	1%
Other (Specify)	9	4%
Don't Know	10	5%

(For a list of verbatim 'other' responses, see Appendix D.)

18. What do you believe is the NEXT biggest barrier?

	Count	%
Lack of Trust	31	15%
Cost	28	14%
Not Knowing How a Lawyer Can Help	22	11%
Not Knowing Where to Start	12	6%
Not Necessary / No Need	11	5%
Bad Reputation of Lawyers	10	5%
Finding a Good Lawyer / The Right Lawyer	7	3%
Time Commitment	7	3%
General Lack of Knowledge about Lawyers / Their Jargon	7	3%
Doubting their Understanding of My Situation	5	3%
Other (Specify)	18	9%
Don't Know	46	23%

(For a list of verbatim 'other' responses, see Appendix D.)

Combined Biggest and Next Biggest Barriers Preventing Business from Using Lawyer Services

	Count	%
Cost	177	82%
Lack of Trust	38	18%
Not Knowing How a Lawyer Can Help	36	17%
Not Necessary / No Need	23	11%
Not Knowing Where to Start	19	9%
Bad Reputation of Lawyers	12	6%
General Lack of Knowledge about Lawyers / Their Jargon	9	4%
Finding a Good Lawyer / The Right Lawyer	8	4%
Time Commitment	8	4%
Doubting their Understanding of My Situation	6	3%
Other (Specify)	26	12%
Don't Know (1 st Mention)	10	5%

19. If your company were to utilize the services provided by a lawyer, which of the following types of fee arrangements would you prefer? Would you prefer...

	Count	%
A Firm Quote for an Entire Case or Project	69	32%
A Set Amount for a Specific Task or Service	49	23%
An Hourly Rate	39	18%
A Fee That Depended on the Result, whether in Part or in Whole	26	12%
A Monthly Charge for Certain Ongoing Services	17	8%
Depends on the Situation	11	5%
Other (Specify)	1	1%
Don't Know	4	2%

(For a list of verbatim 'other' responses, see Appendix D.)

20. Using a one-to-seven scale where one is "not at all interested" and seven is "very interested," how interested would your company be in having a lawyer on retainer to handle company business matters, such as taxes, licensing, keeping you apprised of new laws, keeping track of paperwork, drafting contracts, and keeping corporate minutes?

	Count	%
1 = Not at all Interested	129	59%
2	35	16%
3	13	6%
4	13	6%
5	9	4%
6	4	2%
7 = Very Interested	14	7%
<i>Average Mean</i>	2.11	
<i>Median</i>	1.00	
Don't Know	0	0%

Demographic Questions

21. What industry best describes your company?

	Count	%
Advertising / Marketing	4	2%
Agriculture	7	3%
Automotive Sales / Services	14	7%
Business Services	11	5%
Construction	38	18%
Cosmetics / Hair	4	2%
Entertainment	2	1%
Financial Services	7	3%
Government / Schools	4	2%
Healthcare	21	10%
Home Services	9	4%
Insurance	6	3%
Manufacturing	11	5%
Oil / Gas / Mining	0	0%
Real Estate	10	5%
Restaurant	13	6%
Retail / Wholesale	24	11%
Technology	5	2%
Telecommunications	0	0%
Travel / Hotel	3	1%
Trucking / Transportation	11	5%
Other (specify)	12	6%
Don't Know	1	1%

(For a list of verbatim 'other' responses, see Appendix D.)

22. How many employees does your company have?

	Count	%
1 = 1 to 2	25	12%
2 = 3 to 5	63	29%
3 = 6 to 10	62	29%
4 = 11 to 19	33	15%
5 = 20 to 49	21	10%
6 = 50 to 99	6	3%
7 = 100 to 199	2	1%
8 = 200 to 499	3	1%
9 = 500 or More	0	0%
<i>Average Mean</i>	3.01	
<i>Median</i>	3.00	
Don't Know	1	1%

23. What is your company's annual revenue?

	Count	%
1 = Less than \$1 Million	97	50%
2 = \$1-5 Million	74	38%
3 = \$6-10 Million	6	3%
4 = \$11-20 Million	1	1%
5 = \$21-50 Million	2	1%
6 = \$51-100 Million	0	0%
7 = More than \$100 Million	3	2%
<i>Average Mean</i>	1.63	
<i>Median</i>	1.00	
Don't Know	11	6%

This concludes our survey. We thank you for your time and opinions.

APPENDIX B: CURRENT JOB TITLE OR POSITION

What is your current job title or position in your company?

- Accountant
- Accounts manager
- Administrative manager
- Appraiser
- Assistant
- Manager, associate
- Bookkeeper
- Building official
- Business administrator
- CEO (4)
- CEO, owner (2)
- Certified PA
- CFO, owner
- Chemical engineer board license
- Chief everything officer
- Clinical psychologist
- Contractor
- Co-owner (3)
- Co-owner, artist
- Corp. officer
- CPA, owner
- Director
- Doctor
- Executive director
- Financial planner
- Founder (2)
- General manager
- Insurance agent
- Interior designer
- Manager (14)
- Manager, associate
- Manager, partner
- Managing member
- Managing partner
- Office manager (11)
- One of the corporate officers
- Owner (76)
- Owner of a company
- Owner of a flooring company
- Owner of an RV park and construction company
- Owner, CEO (2)

- Owner, cosmetologist
- Owner, executive director
- Owner, manager
- Owner, manager of three businesses
- Owner, office manager
- Owner, orthodontist
- Owner, president (3)
- Owner, rancher
- Owner-operator (2)
- Partner (3)
- Part-owner
- Pharmacist, manager
- President (27)
- President of a corporation
- President of a used car dealership
- President of CPA firm
- President, dentist
- President, general manager
- President, owner
- Principle
- Project manager for a construction company
- Real estate broker
- Representative
- Retired but self-employed
- Sales
- Secretary
- Secretary of treasury
- Secretary treasurer
- Superintendent of a construction company
- Title insurance, president
- Vice president (9)
- VP of operations

APPENDIX C: REASONS RESPONDENT'S COMPANY HIRED A LAWYER

What was the MAIN reason your company decided to hire a lawyer in that situation, rather than handling the situation by yourself or through other means?

To Ensure Matter was Taken Care of Properly / Legally (23) 15%

- Because of the paper work and making sure it was all done right.
- For peace of mind to make sure all the I's are dotted and T's are crossed.
- Hopefully they would get it handled.
- I just wanted to make sure that it was done properly.
- I want it done legally correct for the correct set up.
- If somebody is challenging you, you want to make sure you're doing everything properly and not have to worry about other problems later.
- Just to make sure everything was legally right.
- Legal concerns
- Make sure all the T's were crossed and I's dotted
- Make sure that it was legal
- Peace of mind
- Prudence to make sure all the I's were dotted, and make sure you are not just making something up.
- So that it was done right.
- This was someone else's properties and we wanted to make sure that we were doing it the right way.
- To cut through all the red tape and find out how to do it the best way.
- To do it right
- To make sure everything was legal.
- To make sure I wasn't overlooking anything.
- To make sure it was done correctly
- To make sure it was done right.
- To make sure we did everything correctly.
- We thought it needed to be done legally.
- We wanted it done right.

Situation was Beyond What Company Could Handle Itself (22) 14%

- I already tried handling it myself for over a year, but I couldn't get my money.
- I am not an expert in law.
- I could not handle it and personally needed a lawyer.
- I don't understand patent law.
- I have no idea how to do a probate. I think you need an attorney for it.
- I tried to handle it on my own and it was getting ridiculous and I had to get someone with a higher power.
- I was not qualified to handle it myself.
- It was beyond our level of expertise.
- It was just necessary that someone had skills that I didn't have.
- It was just too big for us to deal with ourselves.

- It was so big that I needed help to address it
- Lack of expertise
- Not knowing what to do and needing professional advice
- Out of my expertise
- We did it on our own and got nowhere.
- We didn't feel like we had enough experience.
- We don't have anybody that was familiar with that.
- We just didn't know what we were doing.
- We tried doing it ourselves and she wouldn't take it down, so we had to hire a lawyer.
- We tried it before ourselves but it didn't work out.
- We tried to do it ourselves but could not get any money out of them so we got an attorney.
- We were not getting anywhere on our own.

Legal Knowledge / Expertise Lawyer Provides (18) 12%

- Because of the expertise and writing contracts.
- Expertise
- Expertise they offer
- I just thought it would be smart to have professional advice.
- I needed legal help.
- It felt like it was something of their expertise.
- It's what their expertise is.
- Just legal jargon and convenience
- Legal knowledge
- Technical expertise
- They are the experts.
- They know more than I do.
- They're smarter than me.
- To have the technical expertise
- We are not lawyers, we don't know the law. You always need a lawyer.
- We just didn't know the proper steps to follow, so it was mostly just for counsel.
- We needed their level of expertise to make sure our contract was sound, and that there were no questions about what was going on.
- We needed to know the legal ins and outs.

Situation / Lawsuit / Mediation Required a Lawyer (16) 10%

- Another individual suing me
- Board's request
- I think the law requires that we have a county attorney.
- It involved mediation.
- It just seemed like a logical solution to get a lawyer.
- It needs to go to court.
- It seemed like the thing to do.
- It was a bad accident.
- It was a harassment claim, and lawyers like to talk to lawyers.
- It was required.
- It's legally required.

- They sued us so I countered sued one.
- We had to sue individuals.
- We needed one.
- We were being sued.
- We were dealing with an ambulance chaser.

Needed Advice / Consultation (9) 6%

- He had to counsel me. I haven't gone to court yet.
- I ended up handling it myself. I just went to get his input for this deposition, but he didn't represent me or charge me anything.
- I was already having to deal with another attorney for knowledge.
- To get a second opinion
- We had a consult on it. We ended up doing it ourselves, but consulted a lawyer.
- We needed an attorney to review it.
- We needed legal advice.
- We needed the legal advice.
- We needed the legal advice.

Respect / Security that Comes with a Lawyer (9) 6%

- Better representation
- I think they are more effective at accomplishing the task. Getting a letter from an attorney is more intimidating than a collection agency.
- I thought it was better to have a lawyer with me.
- Just the security of knowing that you had a lawyer.
- To have more seriousness for the client
- To have legal backup
- We needed a stronger position.
- We needed somebody with more power to get it done.
- We wanted the sharpest knife in the drawer.

Write a Legal Document / Contract (8) 5%

- I believe it was to write a document for the amount of share in the company.
- I didn't know the legal terms to put on the contract.
- I needed someone to use legal words to write up the contract.
- I think that it was a big enough purchase. I negotiated the contract and he wrote it up.
- Legal documents, makes it cleaner
- The contract was quite complicated.
- There were too many details with the stipulations and the agreement, so we had to have the legal verbiage for the binding.
- We just wanted to make sure everything is taken care of. I did a non-compete clause so the guy I bought the company off of wouldn't compete.

Complexity of Situation (7) 5%

- Complexity, lack of knowledge
- It was a complicated matter and needed someone that knew what they were doing, someone professional.
- It was a huge ordeal.
- It was a new scenario.
- It's complex.
- Looking at the complexity of the lawsuit
- We are familiar with the lawyer and it was a serious situation.

Debt Collection (6) 4%

- It was a collection.
- It was for collections.
- Just the amount of the debt to be collected.
- To put liens on my home
- To try to at least send out letters and see if that would collect the money.
- We had to go through collections. For small claims court we deal with anything under \$10,000, but then we get an attorney for anything over that.

Felt Compelled to Based on Other Party's Size / Behavior (5) 3%

- The other company was a much bigger company than us and we needed someone that knew law.
- The other party was very combative and I hadn't ever dealt with that before.
- The other person didn't want to work it out.
- The other person was in the wrong and they didn't want to pay for the damages, and we needed legal support.
- They were a big corporation, so we needed an attorney to go after them.

Liability (3) 2%

- For liability and to find resolution on selling or the payment
- Liabilities
- Liabilities; he knows the law and the best course to take for our situation.

Other Party Had a Lawyer (3) 2%

- The guy had a lawyer and I had to get one.
- The other parties hired an attorney.
- The other people had an attorney.

Timeliness (3) 2%

- I just thought it was the fastest and easiest way to establish our company.
- Time
- We just felt we didn't have the time or efforts to do it, so to simplify it and to find closure.

Had a Lawyer on Retainer (2) 1%

- I had him on retainer and might as well use him.
- We have a lawyer that we have retained, so we just utilized his services on it. It is something that has more bite coming from a lawyer than from a couple of guys through certified mail.

Miscellaneous Responses (15) 10%

- A friend of ours sent a certain amount to a lawyer because we haven't had any luck with the company that does collections.
- Cost effective for the time spent on a specialty idea
- For trusts for our children
- I am not sure, self-protection.
- It was a small lease.
- It was the seller of the business's lawyer.
- Just to protect my assets.
- Our accountant also has the ability to do it, so when things come up and it is out of our realm, he is available.
- Proper, and because Utah is considered a foreign country in regards to business.
- The cost
- The thing was done with the intent to do damage. Utah has issues and I am not Mormon and I prefer to go out of state. I have no faith in the San Juan County legal department or system.
- Theft
- To help negotiate
- To identify a remedy
- We had a lawyer, but it was basically handled by ourselves through two of the family members who are executors to the estate. My dad had all of his ducks in a row. He had his estate and will all figured out before and it made things easy to execute.

Don't Know / Wouldn't Say (4) 3%

- I couldn't tell you why we did that because the owner did it, but it makes no difference because we didn't get any money.
- I don't know.
- I have no idea. It was before I was involved.
- Wouldn't say

APPENDIX D: 'OTHER' RESPONSES

Where or who would you go to if your company needed assistance for employee procedures or problems?

Internet

- Google (3)
- Google or HR company
- I would just look it up, search it.
- My husband would just look online, so I'm not sure.
- Not specified
- State of Utah website
- The state website
- The state websites

Other

- Counselor
- I have a payroll service that takes care of my HR issues. I believe that they have legal counsel on staff.
- I have my own contractors.
- I would go to the labor commission.
- Insurance
- Insurance carrier
- National Federation of Independent Business
- Payroll company
- Small Business Administration
- State
- Union
- Utah Employers Council
- Utah Labor Commission
- We have a local company that takes care of that stuff.
- We have a third party company we utilize.
- Workers comp
- Workforce Services

Where or who would you go to if your company needed assistance for the purchase or sale of the business?

Internet

- Google
- Google search for an acquirement group or liquidation
- Just the Internet
- Not specified (2)
- Online

Other

- A company that does both financial and legal.
- A company that handles acquisitions
- I would go to the title company.
- I wouldn't do either.
- Investors
- It hasn't come up and it won't come up for a while.
- Owner only
- Partners
- Practice management company
- Someone that specializes in insurance agencies.
- There are companies that do the purchase and sale of the business.
- Title company

Where or who would you go to if your company needed assistance for starting a new business?

Internet

- Browse the internet
- Google (4)
- I'm not sure what I would look up.
- Not specified (3)
- Online
- Small Business Association
- Smallbusiness.gov
- State website
- Utah state website.

Other

- Bank, SLCC has classes on starting a new business
- Chamber Of Commerce
- City council
- County commissioner
- Entrepreneur programs
- I wouldn't be starting a new business, I'm too old.
- In-house
- Partners, part-owners
- Small Business Association
- Small business development center
- The city
- The economic development office
- To the city to get a business license
- To the state to get a business license
- Utah nonprofit association
- Women's meeting

Where or who would you go to if your company needed assistance for tax rules and requirements?

Internet

- Google
- Internet
- Not specified
- The state website

Other

- In-house
- Licensing with the state
- National Federation of Independent Business
- We have a contact at the IRS.
- UVU professor
- Business partners
- Bookkeeper

Where or who would you go to if your company needed assistance for writing or negotiating a contract?

Internet

- Google
- Legal Zoom
- Look up local lawyers
- Not specified

Other

- Management company
- Partners
- They are written up by other companies and I just sign.
- Title company that we have worked with
- Union

For what situations might your company use a lawyer?

- Adding a partner
- Advice (2)
- As little as possible.
- Cease and desist
- Cease and desist letters
- Changes in our corporation
- Conflict resolution
- Damage
- Death
- Depositions
- Disputes

- General business issues
- Grievances
- I would go to a lawyer for threats.
- If the state was coming after me or if the city was coming after me, which is highly corrupt. I had both the city and county come after me and I turned around and counter-sued them. That is where I got the lights turned on with all my legal training that I had in college. I have my own federal lawsuit that I'm working on. I can honestly say it is crooked from the top to the bottom, and everything in-between that is all corrupted. I feel sorry for our legal system. I've even contacted Sean Reyes and I filed a complaint with you guys and nothing came of it.
- If we're subpoenaed for records
- Insurance claims
- It depends on what the situation is.
- It depends what the situation is.
- Labor disputes
- Legal matters that have to do with the ownership.
- Only for a state plan
- Protect my company
- Set up a trust, general counsel, business problems
- Setting up a trust
- Shareholder, insurance
- Slander
- Transferring shares
- Vendor complaint
- When I go out and train somebody, someone might come back to me and tell me that I did it wrong.
- Wills and trusts
- Wills, state things
- Workers comp insurance, disability

Where or how did you find that lawyer?

- A local lawyer
- He found me at a networking event or service club.
- I just found somebody in my area.
- I kept calling lawyers until I finally got to one that could help me.
- Legal Shield program of paid attorneys
- The lawyer was the seller's lawyer.
- Yellow Pages

What was the situation your company used a lawyer for most recently?

- A fabrication dispute
- Business purposes
- Bylaws
- CC&R subdivisionals and regulations
- Cease and desist
- Claim
- Collection
- Conflict of interest
- Dispute
- Dispute with a client
- Family trust deeds and documents
- File a cease and desist
- Handling a probate
- I had to do a deposition for a client of ours and the attorney helped us with that.
- I haven't used a lawyer recently.
- Inheritance
- Legal documents
- Offering a deposition, purchase of a second home, 1031 exchange
- Prosecution
- Regulatory
- Settling the family estate when my father, the previous owner, passed away.
- Someone wrote the company a bad check.
- Sub-contractor problem
- Subpoena for records and bill collection
- To go after another company
- To set up shareholders
- Trust
- Unlawful enrichment case and anti-steering case
- Water law
- We have storage units and there were some scooters we found in there, and we wanted to know if we had to go beyond the usual routine to sell the contents.
- We haven't used one recently.
- Workforce services audit

Imagine your company needed the assistance of a lawyer today. Where would you go to find a lawyer?

- A local lawyer probably
- Across the street
- Find someone in my area that I am familiar with.
- His name is Jacob Muklewicz.
- I would be very hesitant. The reason being when I looked it up with the city, I was not able to find any constitutional counsel - my rights were violated.
- I would call LegalShield and ask for a referral.
- I would go to Diane Jones
- If a friend didn't know how to handle it, I would go to state assistance.

- If it was a suit against me, we would use malpractice insurance.
- Insurance company
- NFIB
- St. George, Utah because that's the big city we're closest to.
- Yellow Pages to see what type of attorney they are.

What do you believe is the biggest barrier preventing businesses from using services provided by a lawyer?

- Approachability
- Corruption and shake downs and sucking you out of your money. They want to see how long they can drag the thing out. I witnessed a company go down because the attorneys sucked out their money.
- Having fear
- My insurance will cover me
- Negative past experiences
- Not aggressive enough, take too long to take care of their client, not very helpful to get results these days, lazy
- Probably fear of having to get to know one.
- There is not visible advertising for lawyers. Business consulting for lawyers, that's what I do.
- Which situation is appropriate.

What do you believe is the NEXT biggest barrier?

- Accessibility
- Bad experiences
- Fear of disclosure
- Government
- Hassle of getting an appointment
- I'd rather do it myself.
- Inconvenience
- Keeping a good relationship between an employer and employee.
- Lack of advertising
- Not being able to find a lawyer and the cost of it being too much.
- Some type of return suit
- There's not a lawyer very close.
- They misrepresented the peoples' constitutional rights.
- They over-complicate things
- Unpredictable results; I have never met a lawyer that has made me any money.
- Value
- Value of the lawyer
- Why do I need an attorney when someone else could probably do it?

If your company were to utilize the services provided by a lawyer, which of the following types of fee arrangements would you prefer?

- A firm quote for an entire case or an hourly rate

What industry best describes your company?

- Candy and confectionary industry
- Electrical chemical processing
- Electrical engineering services
- Engineering
- Equipment rental
- Industrial commercial
- Meat cutting
- Music, service industry, construction
- Non-profit
- Printing
- Quilting
- Video game development