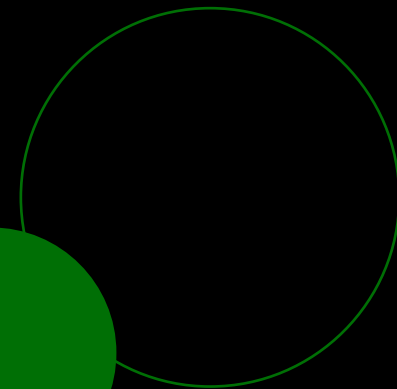
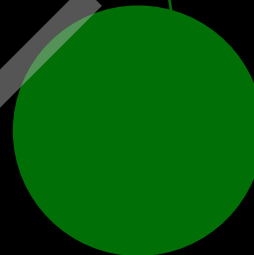
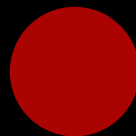
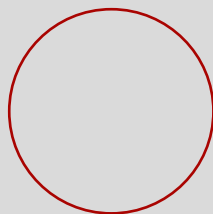


LEGALEASE RESEARCH SERVICES



SCOTLAND
UK MANAGING PARTNERS' CLIENT SATISFACTION REPORT 2021

The Managing Partner's Client Satisfaction Report 2021

Welcome to the Managing Partner's Client Satisfaction Report for the UK, 2021.

In this comprehensive examination of client perception of law firm service across the UK, we have worked with Legalease Research Services to assess the strengths and weaknesses of law firms across a range of criteria, setting out clients' appraisal of the quality of the teams they work with, the value they believe they get from law firms, and their confidence in the industry knowledge their legal advisers bring to the work they do for UK companies.

With over 150,000 clients contacted in the UK every year providing scored data assessments of law firm service, we are uniquely able to define objective, benchmark scores by jurisdiction and practice area, making this report the most reliable evaluation of client satisfaction available on the market.

This report is exclusively available to legal500.com profiling firms, and represents the largest survey of its kind ever conducted.

All Managing Partner Client Satisfaction Reports are prepared to statistically valid standards, facilitated by the unparalleled access to the vast datasets generated in the course of our annual research. Those datasets allow us to build scientific indicators of relative law firm performance, measured against the entire market and within specific peer groups and practice areas.

This report focuses on law firm performance in Scotland. The tables on the following pages set out relative client satisfaction levels against the wider market, and report how clients in your part of the UK believe the services they provide stand up compared to national benchmark figures.

We're proud to be bringing objective assessments of client satisfaction to the UK legal market for the first time, part of legal500.com ongoing ambition to help law firms provide the very best service to their clients and fine tune the outstanding UK legal profession's engagement with the market.

All findings in this report are guaranteed accurate and correct (within the statistical parameters specified). This is objective data.◆

Georgina Stanley
Editor, The Legal 500 United Kingdom



The Managing Partner's Client Satisfaction Report 2021

Criteria and assessment

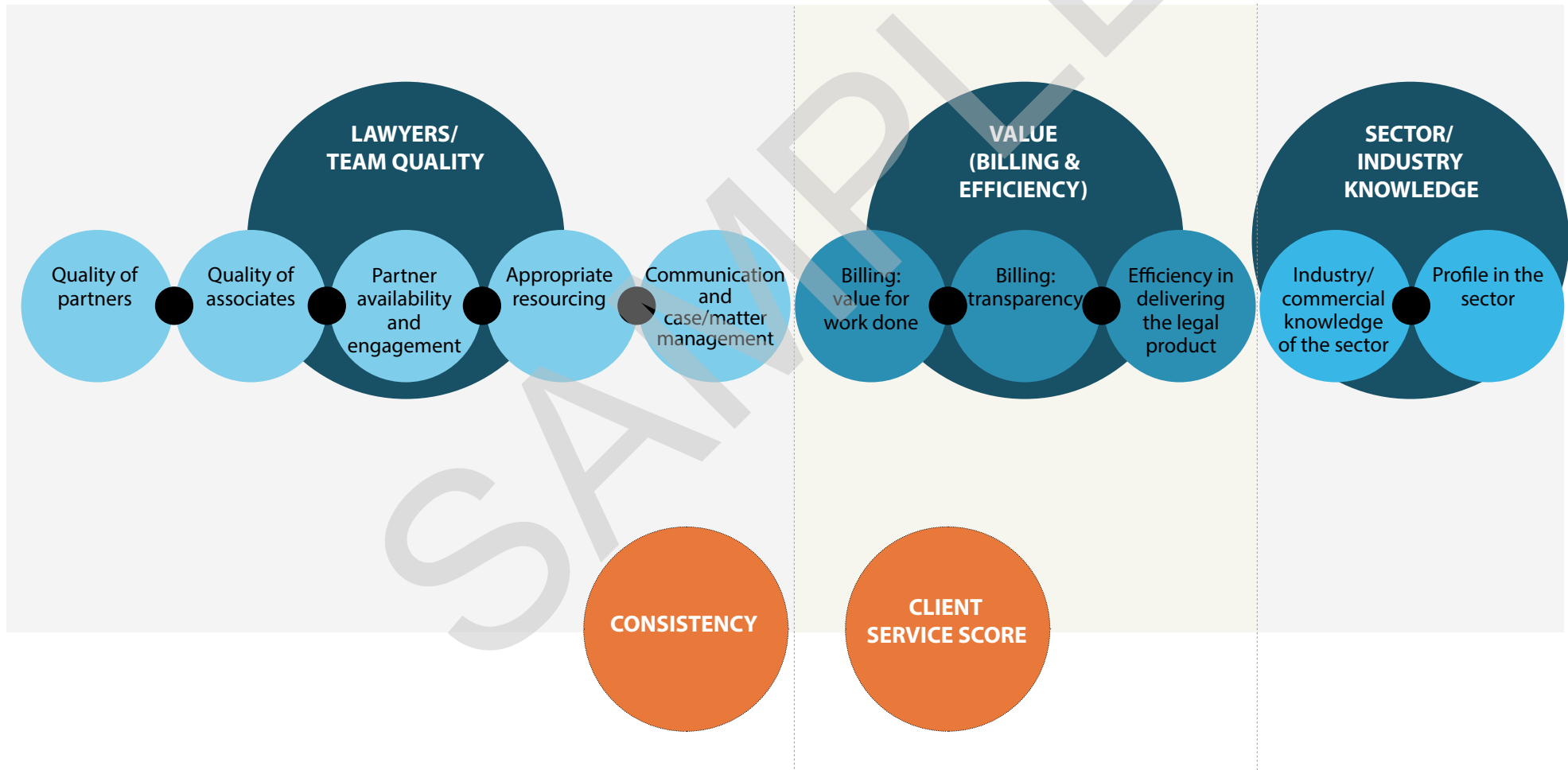
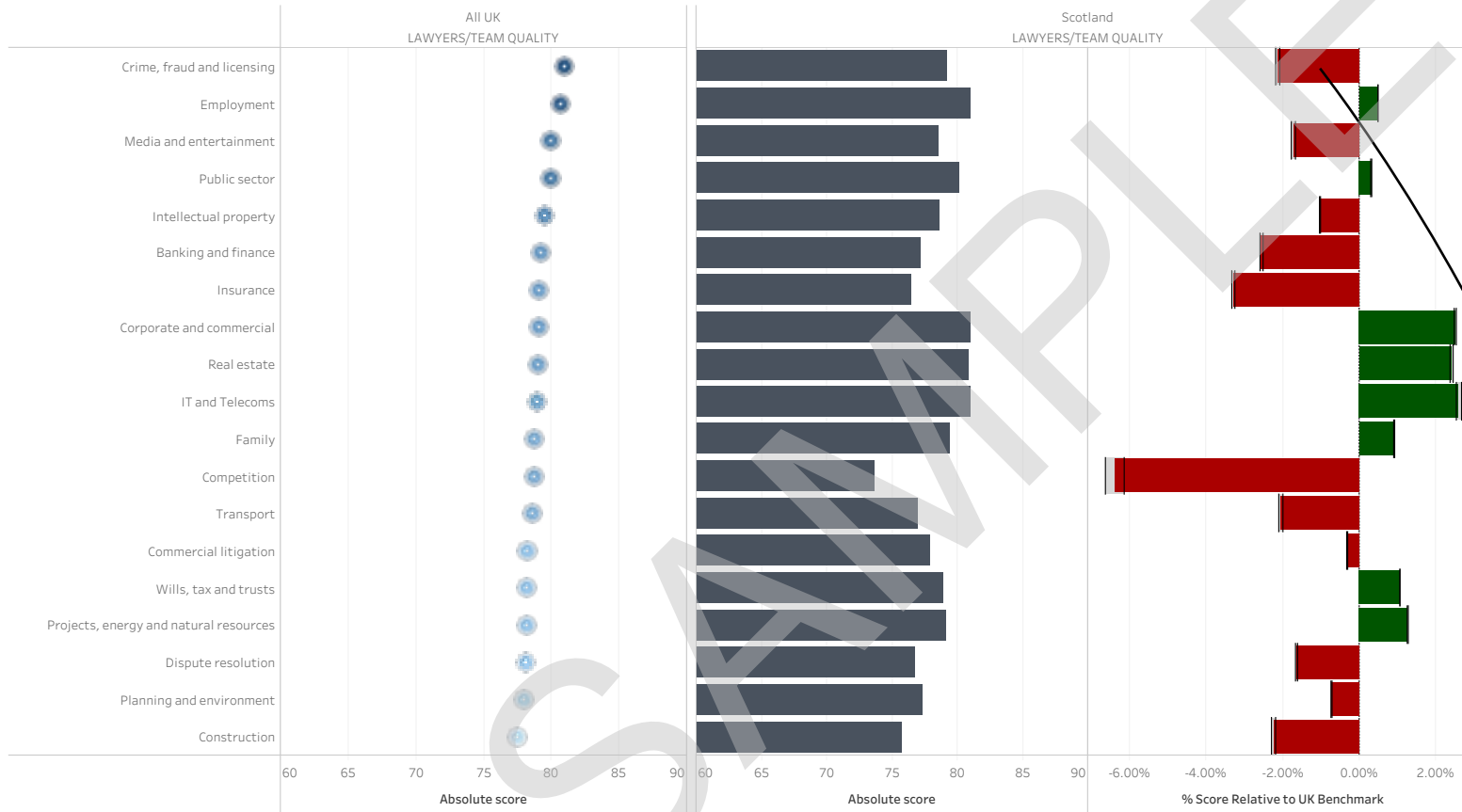


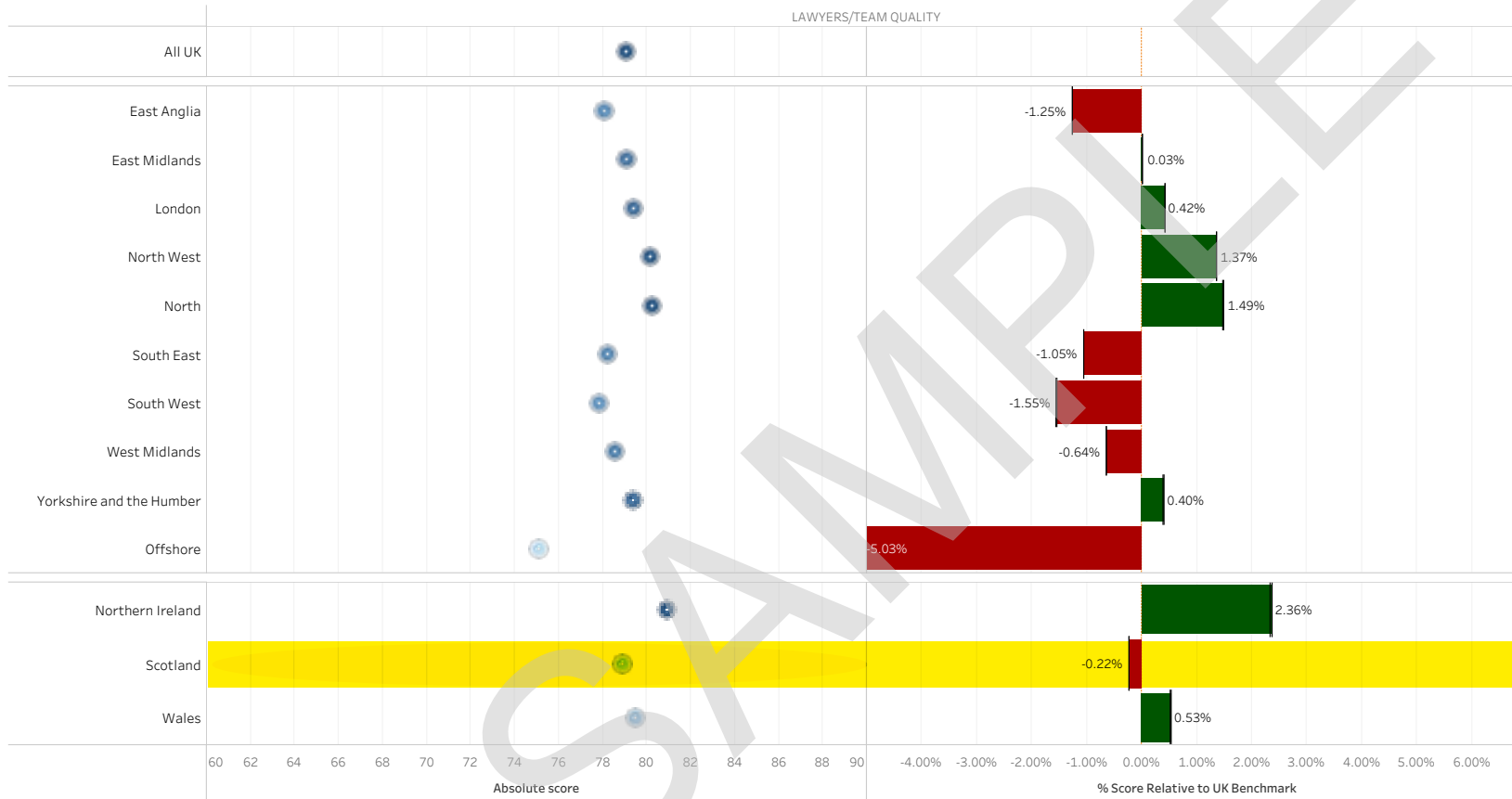
Fig 3.1 Scotland Client service by practice area compared to UK Benchmark | LAWYERS/TEAM QUALITY OVERALL



This series of charts breaks down performance by business practice area within Scotland. The grey bar charts in the middle show the absolute scores, while the red and green bars to the right indicate more specifically how each of those scores relates to UK Benchmarks for each business practice area (illustrated by blue pin markers to the left). The first chart shows firms' performance for overall Lawyers/ Team Quality, with the strongest teams perceived to be found in the corporate and commercial, IT and telecoms and real estate practice areas, and the least well-received teams found within competition law departments.

Note that while Scotland's absolute score for Crime, fraud and licensing in this criteria is fairly high, this score is below the UK benchmark for this practice area, which nationwide is the best performing sector for team quality.

Fig 4.1 Scotland client criteria scores compared to rest of UK | Lawyers/Team Quality overall



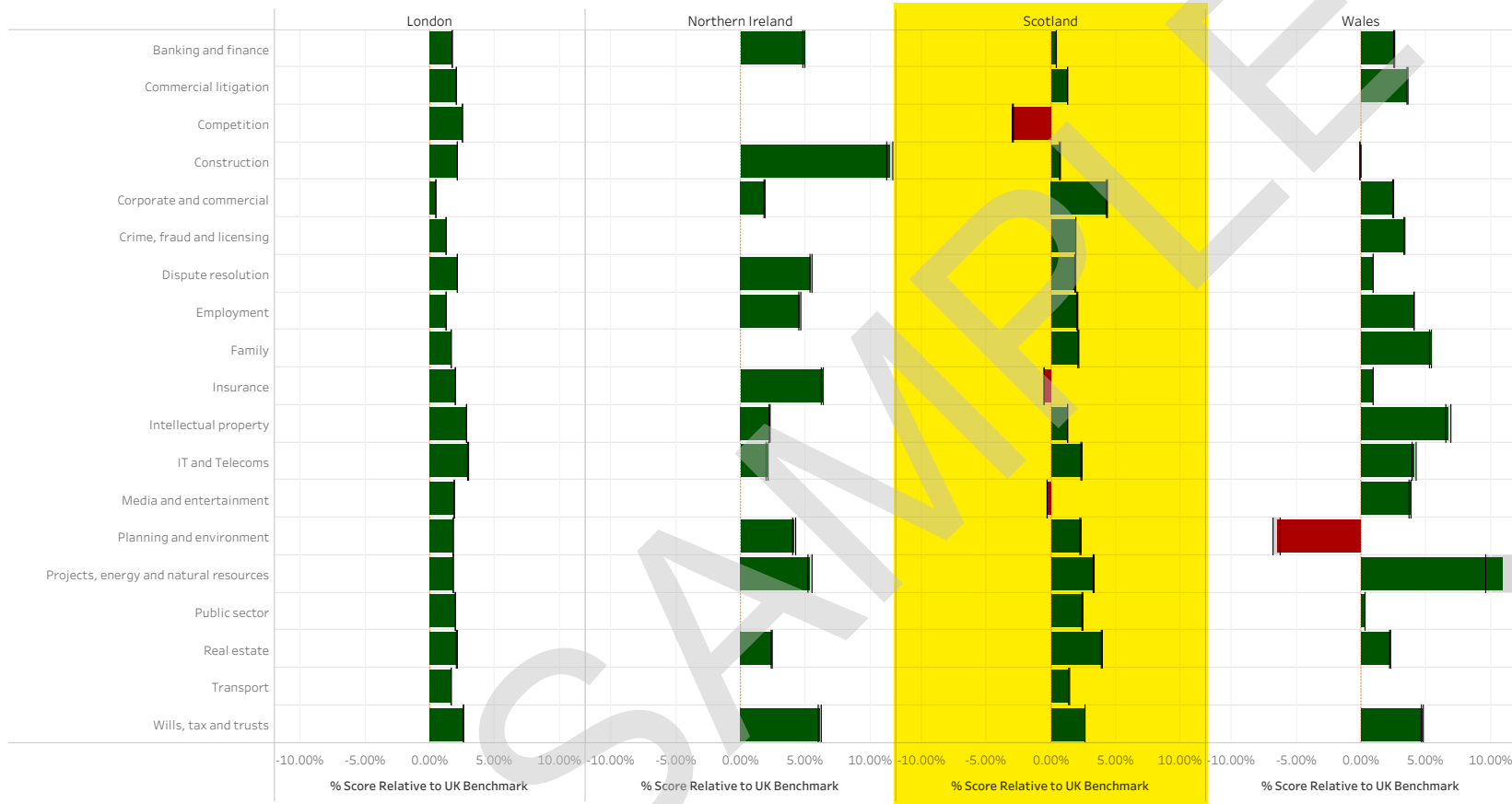
Part 4 of our report measures Scottish firms' performance across each client criteria against other parts of the UK, including London.

The pin markers to the left represent the absolute scores with the UK Benchmark at the top of the graph. The bars to the right indicate percentage scores relative to that Benchmark.

Scotland's scores are highlighted in yellow on each chart. Here they closely track the UK Benchmark data.

The breakdown underlines the relatively strong performance of the North West (and Northern Ireland) compared to the rest of the UK, with the south west of England, offshore firms and East Anglia performing least well against national benchmarks.

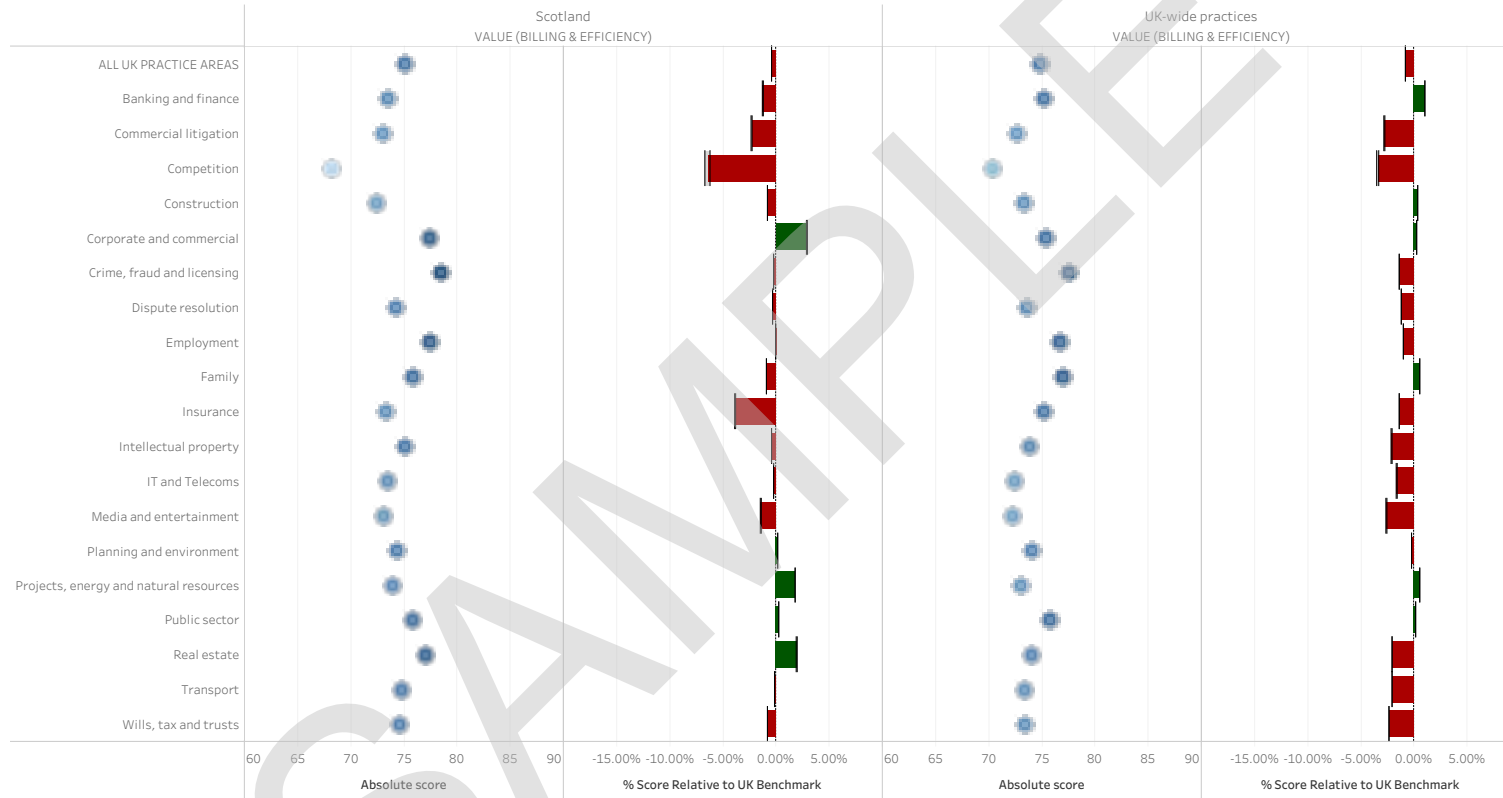
Fig 5.3 London/National Client Service Score compared to UK Benchmark | All practice areas



In London, where the greatest concentration of legal services in the UK is found, the scores tend more closely towards the UK Benchmark figures. Nevertheless some comparative trends emerge at the overall Client Satisfaction score level. The capital's weakest scoring occurs within the Corporate and commercial sector, whilst it excels in IP and tech practice areas.

Northern Ireland attracts excellent scores in the majority of practice areas, with construction noteworthy for its outstandingly positive scores. The same goes for projects work in Wales.

Fig 7.2 Scotland v UK-wide firms | VALUE (BILLING & EFFICIENCY) OVERALL



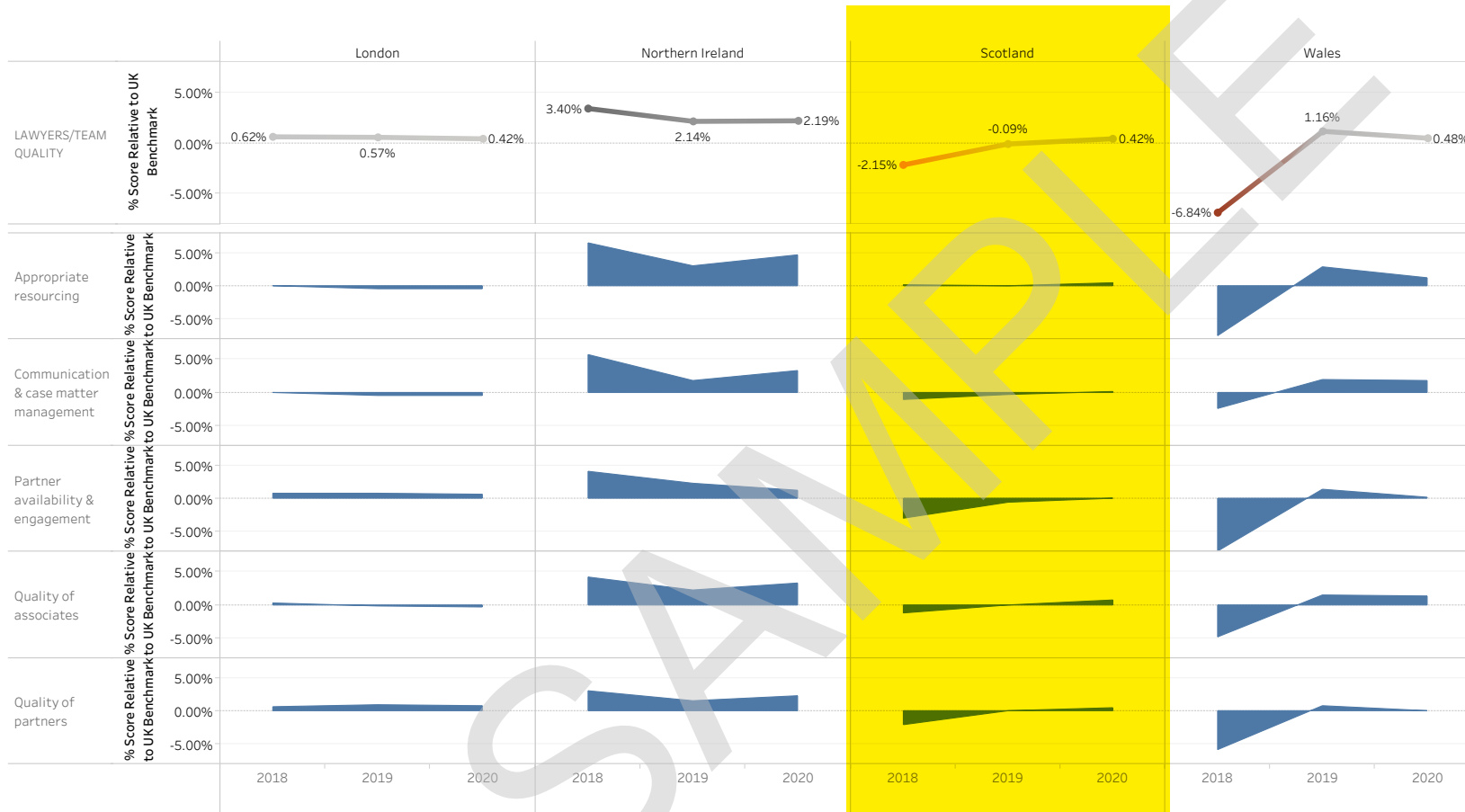
The majority of departments record broadly matching or positive scores relative to UK Benchmark figures for overall value at firms in Scotland, with corporate and commercial teams leading the way. Variations from Benchmark levels are less marginal among UK-wide practices.

Some of Scotland's lowest performance indicators appear for billing: value for work done and transparency. Here the majority of listed departments score negatively relative to Benchmark levels with some notable exceptions:

projects teams in particular score appreciably less well than other teams, though they also compare fractionally less favourably with UK-wide practices.

Scottish crime, fraud and licensing and real estate teams score significantly higher than UK-wide practices for efficiency in delivering the legal product, while the opposite is true of banking departments.

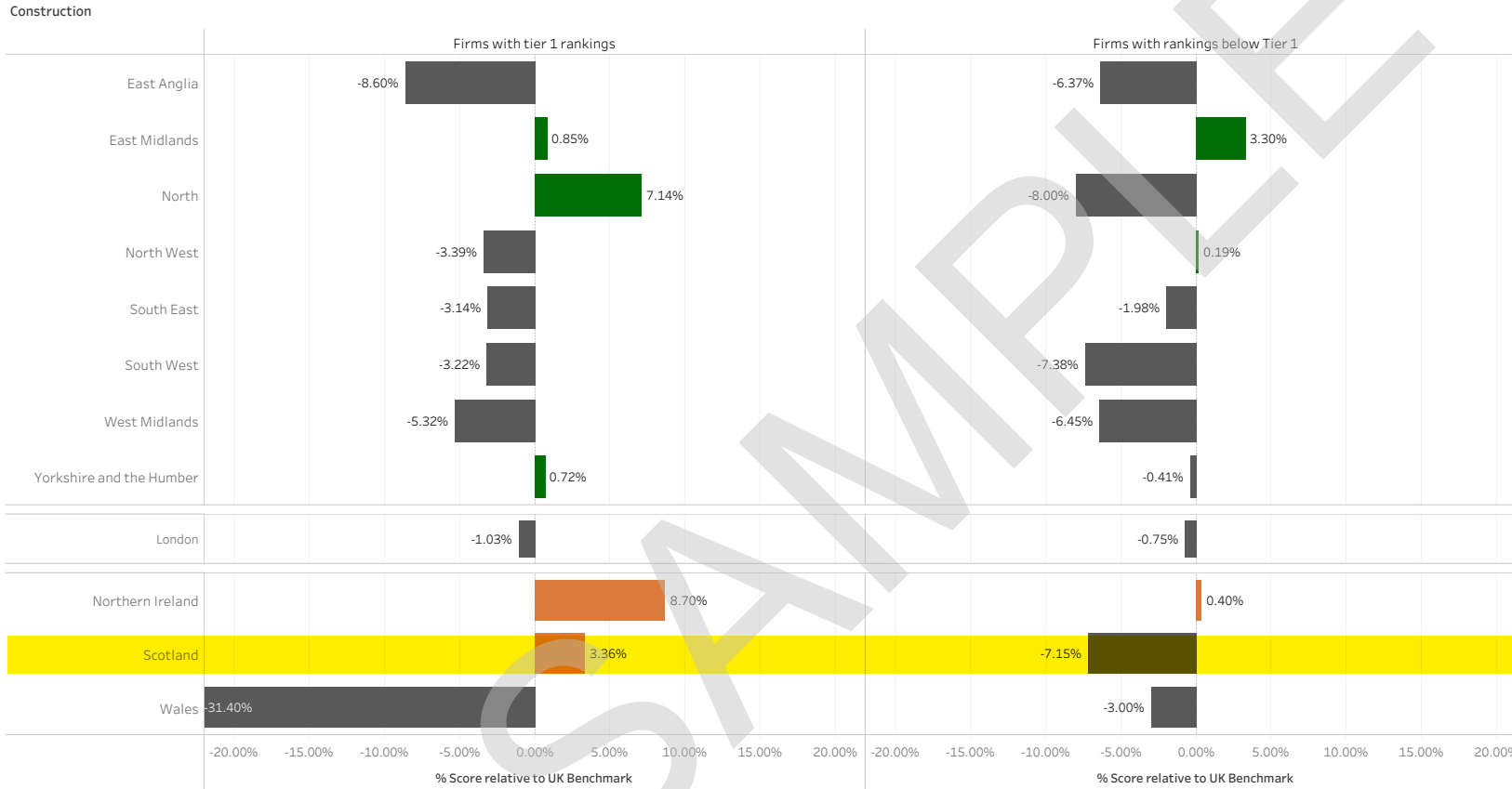
Fig 9.1 Regional/national year on year client service scores 2018-20 | LAWYERS/TEAM QUALITY OVERALL



Nationally, Northern Ireland's Client Service performance leads the way for lawyers/team quality, though a slight decline is discernable over three years and both Scotland and Wales' scores have risen sharply in the same period.

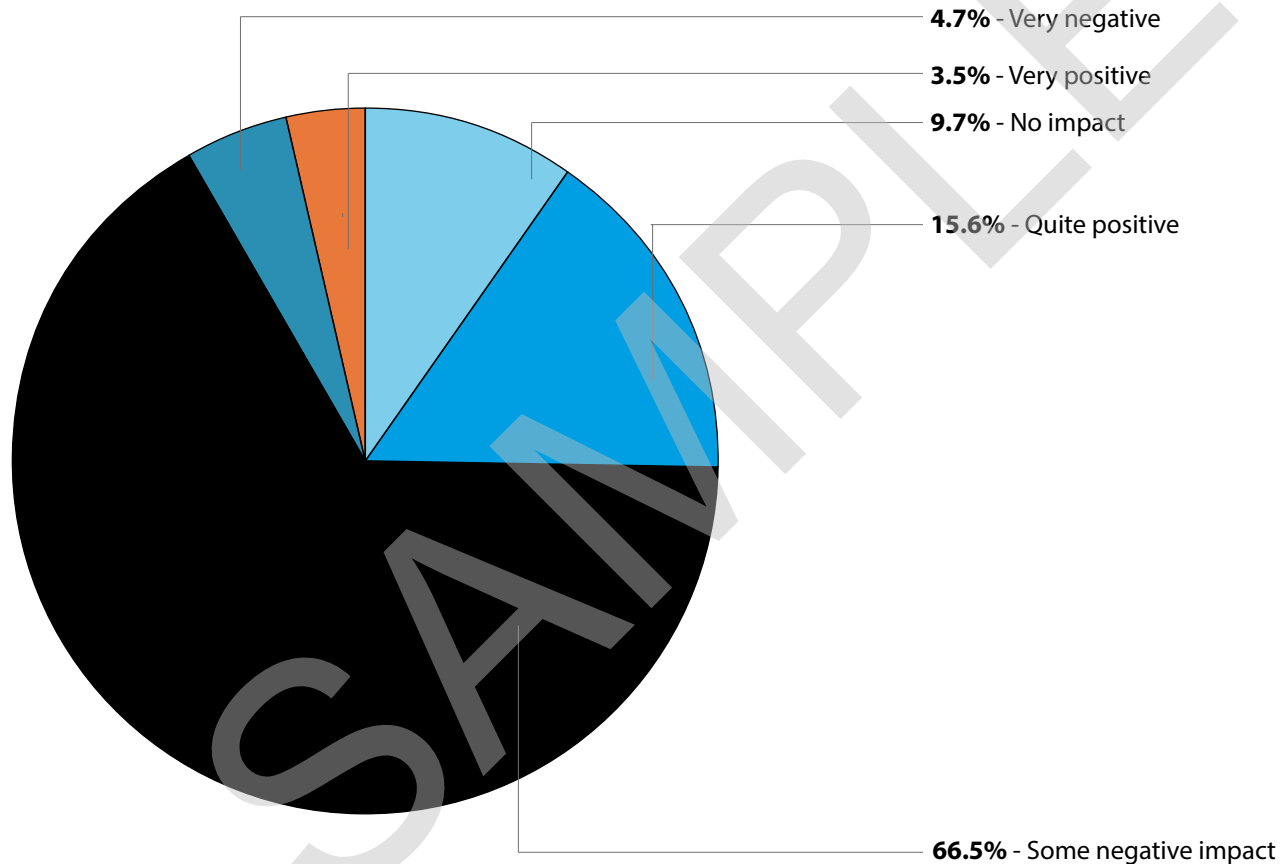
London scores have remained consistent throughout the three-year period though some variation can be seen within individual criteria, with London firms scoring below Benchmark levels for resourcing and communication but maintaining healthy scores for quality and availability of partners.

Fig 10.4 Regional/National Client Service scores for top tier and other tier firms compared to UK Benchmark | Construction



Construction practices in the west of the UK and Wales with top-tier rankings go against national trends, scoring less well than firms with rankings below tier 1 (dramatically so in Wales). Firms ranked in construction in London show relatively consistent scores within and without top tier rankings.

Fig 11.1 What impact has Covid-19 and the ensuing recession had on your firm so far?



“Costs sensitivities have increased and are likely to remain a big driver for client work placements for at least 12-24 months”

Subscribers to *fivehundred* magazine, made up of partners and senior lawyers at the UK's top law firms, were invited to participate in a short survey designed to assess the impact of the Covid-19 led recession on the legal market in 2020, and to give their views on likely ongoing effects on client service and the law firm client relationship.

The overwhelming majority of those surveyed indicated they had already felt a moderately negative impact on their firms from the pandemic and ensuing recession.

Nevertheless a healthy proportion - some 16% - felt that from their firm's perspective the impact had been quite positive.

Relatively few of those surveyed felt that the consequences for their firms had been extreme at this stage. But there were notes of caution: “the bigger challenge is in building new relationships and winning new work in this climate”.