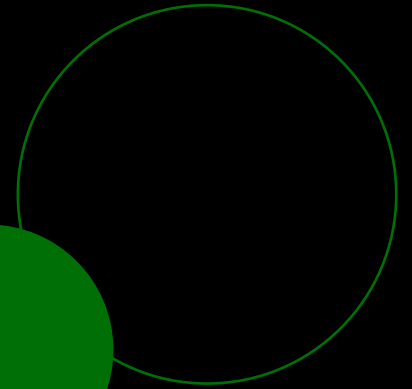
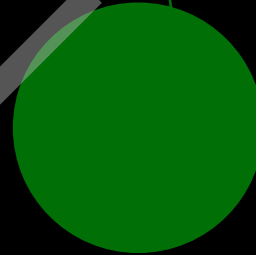
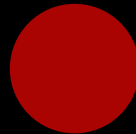
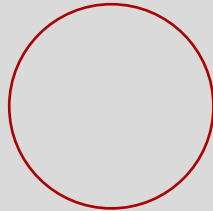


LEGALEASE RESEARCH SERVICES



**SOUTH EAST
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 the South East. 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

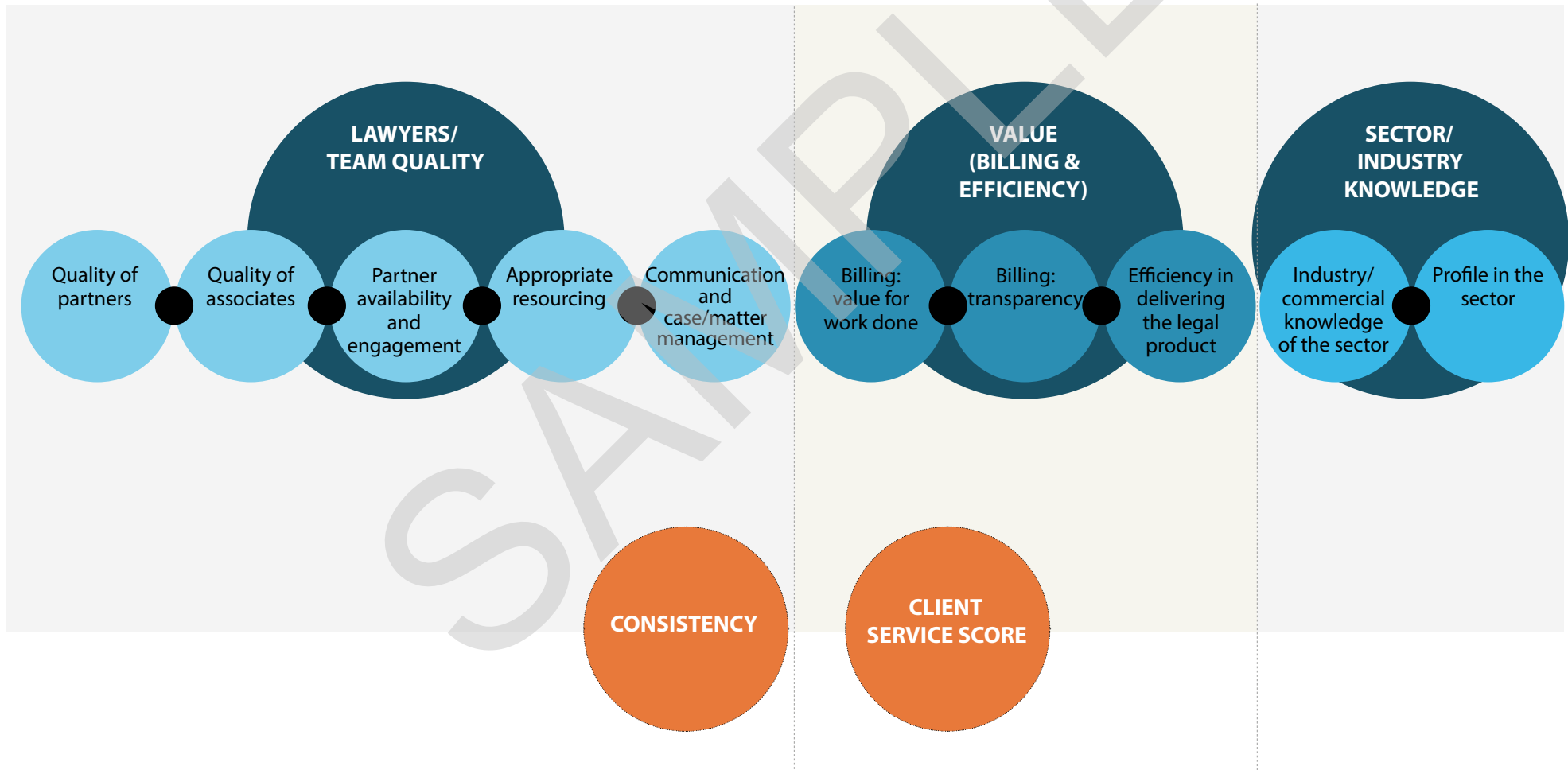
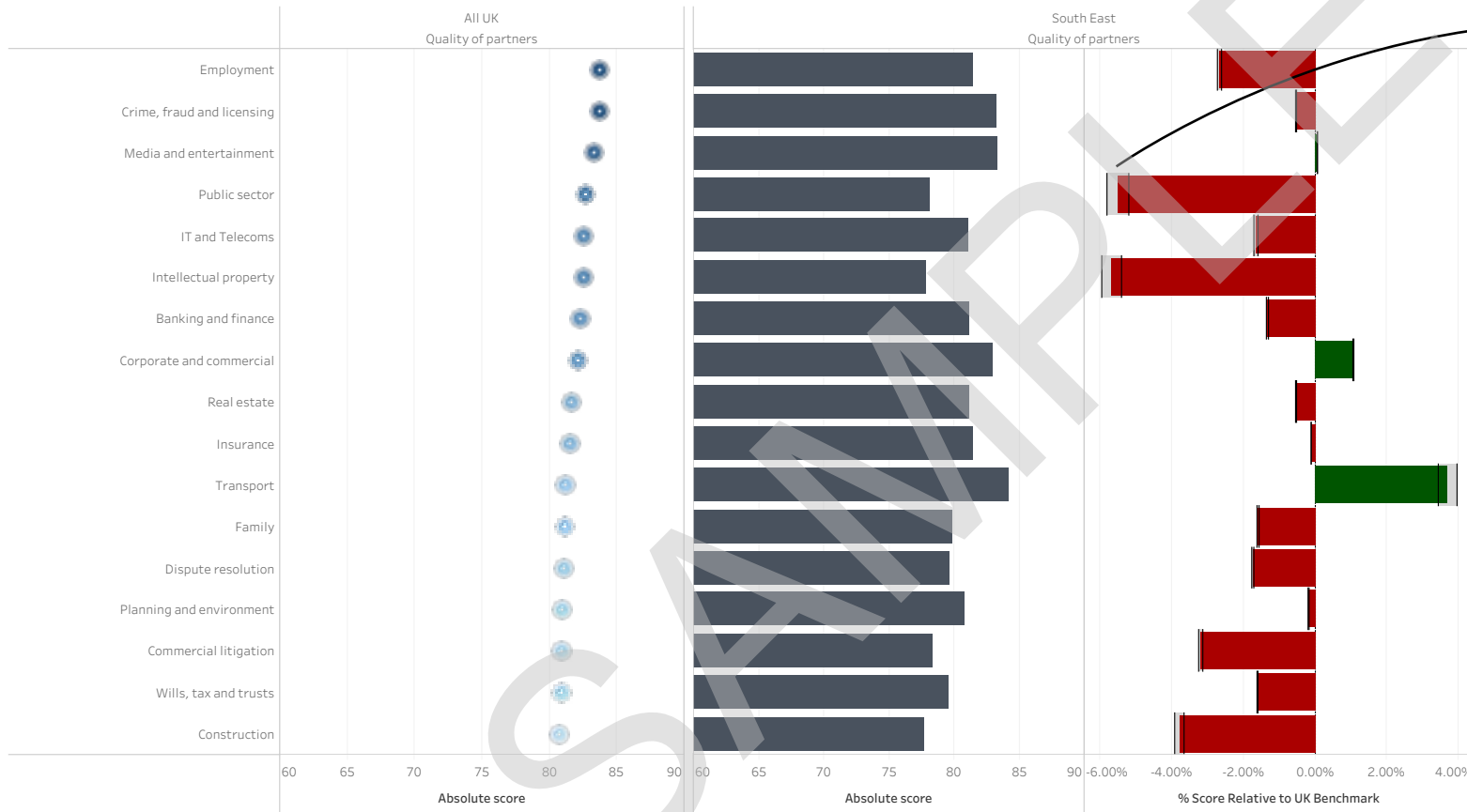


Fig 3.1.1 South East Client service by practice area compared to UK Benchmark | Quality of Partners

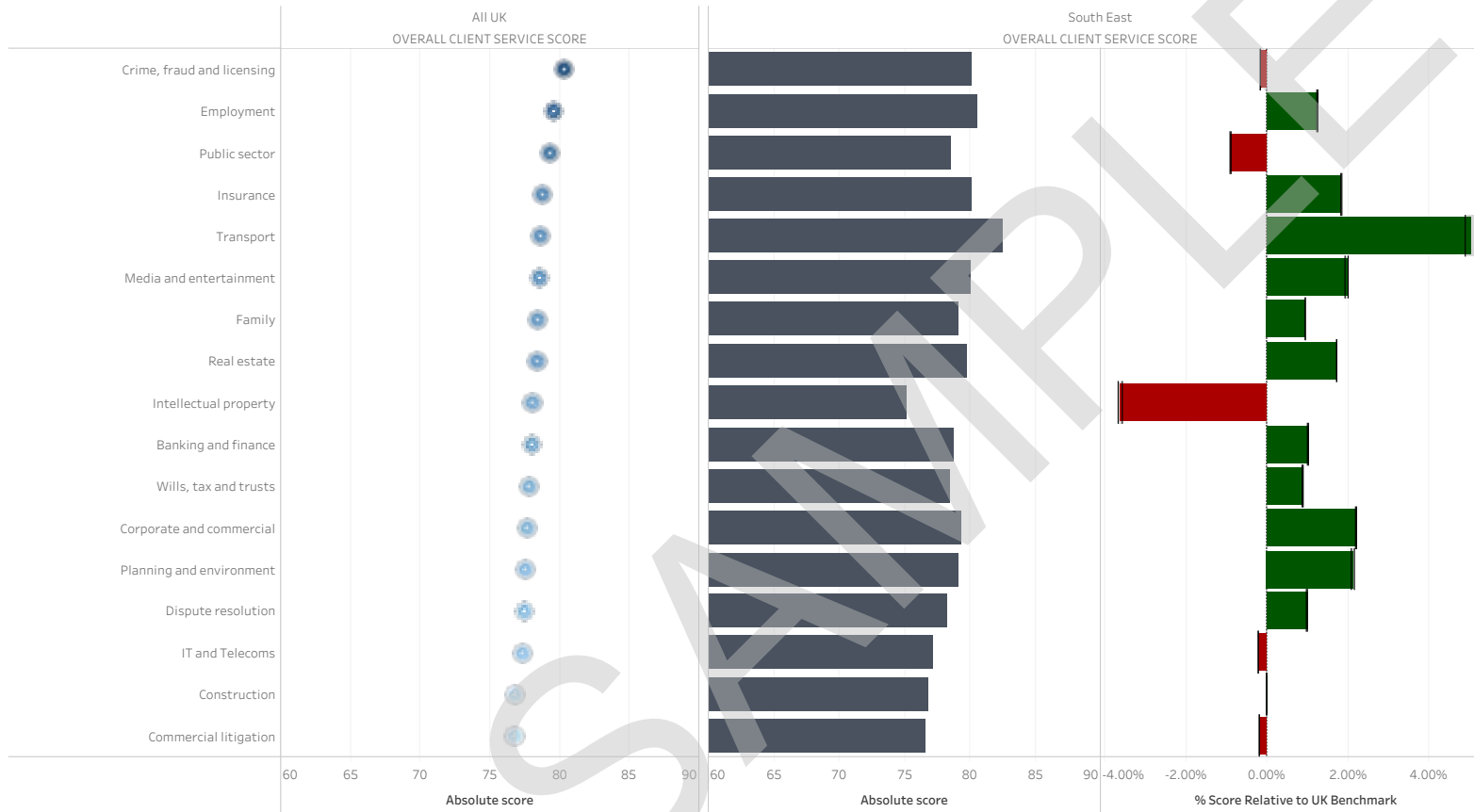


Grey banding on the bar chart indicates possible statistical deviation of this score within our 95% certainty range. See methodology on p.4 for more details.

The graph on the previous page (Fig 3.1) indicates the overall Lawyers/Team Quality performance; the following three pages offer more granular analysis of component criteria Quality of partners; Quality of associates; Partner availability and engagement; Appropriate resourcing; and Communication and case/matter management.

In the South East, corporate and commercial, media and transport partners are all rated above the UK benchmark figure. Meanwhile public sector and IP partners trail the UK Benchmark by the most significant margin among practice areas.

Fig 3.4 South East Client service by practice area compared to UK Benchmark | CLIENT SERVICE SCORE OVERALL

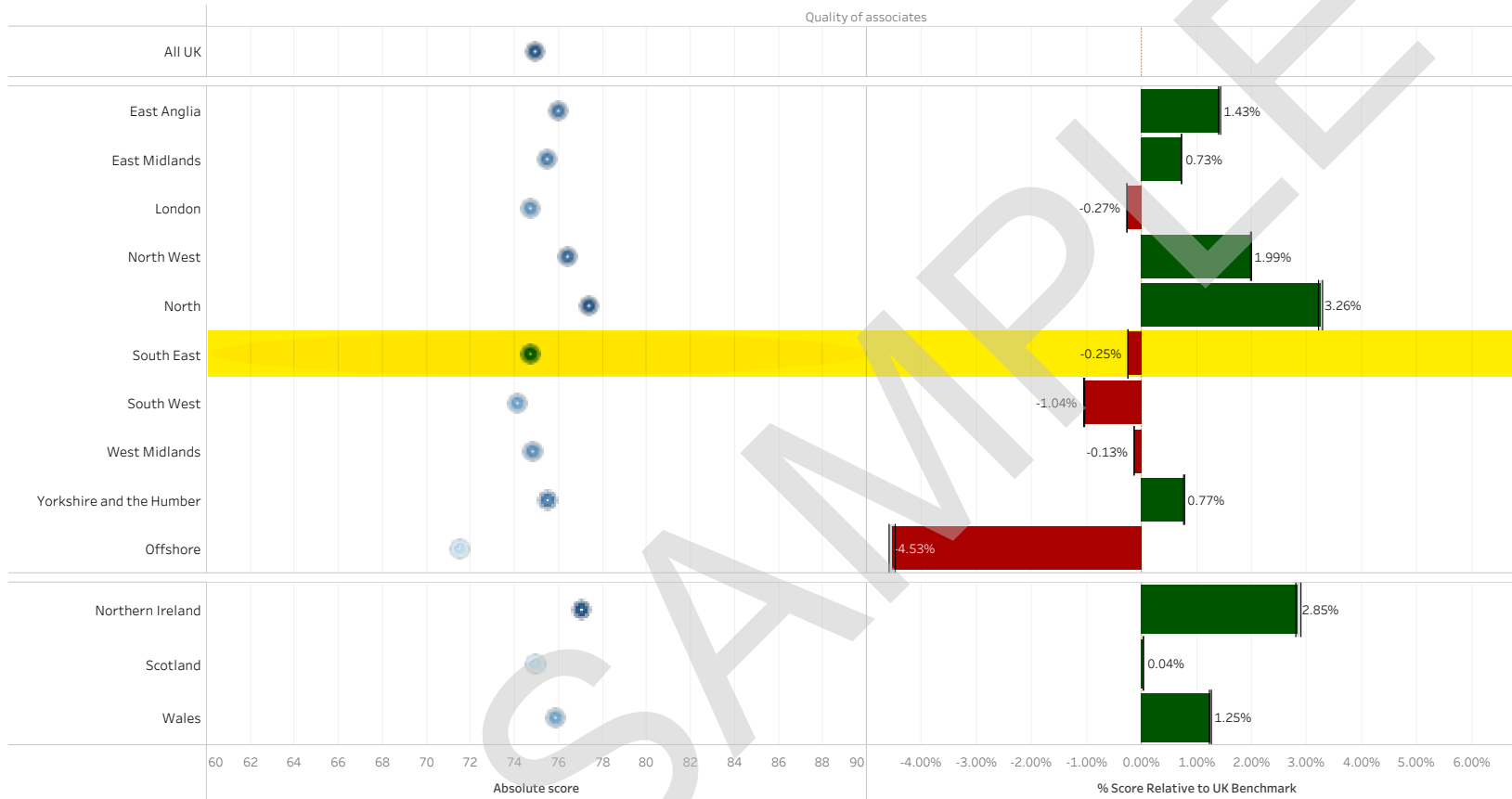


Overall client service scores, which are derived from our proprietary algorithm and take into account Consistency scores as set out on the following page (see methodology on p.4 for more details) are indicative of the aggregate scoring across all client criteria for firms in South East.

These scores reinforce the conclusions derived from previous pages, that transport teams excel but IP teams trail the field by a notable distance.

In general terms South East firms score well compared to national Benchmarks across a wide range of practice areas.

Fig 4.1 South East client criteria scores compared to rest of UK | Quality of associates

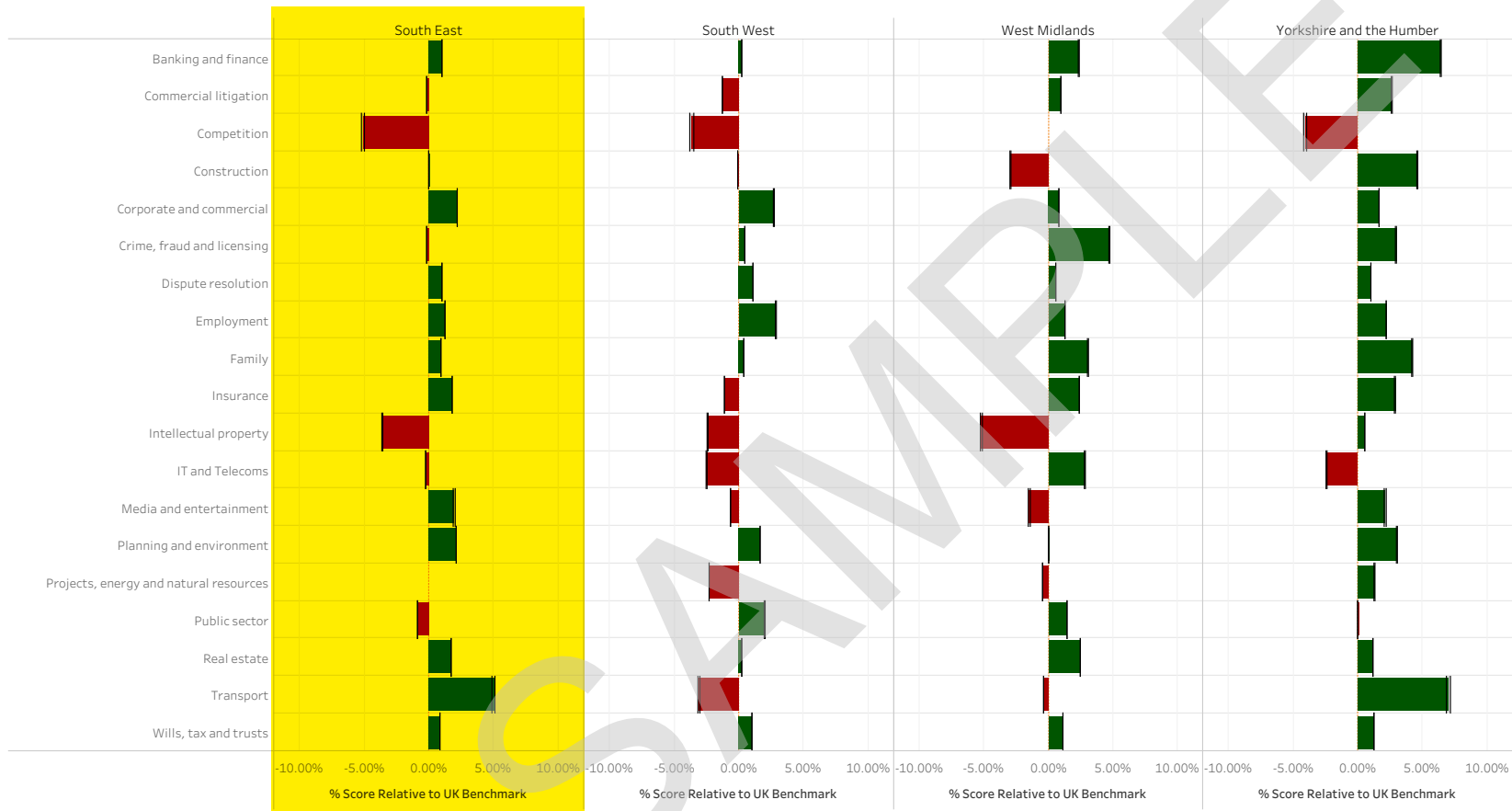


Nationwide there is some evidence of an inverse correlation between perceived quality of partners and perceived quality of associates within teams.

South East associates exemplify this trend to some extent, in that associates significantly outperform more senior colleagues, and achieve close to UK Benchmark scores.

The following pages continue to show a mixed picture for firms in the South East, which score well for communication and resourcing but slightly below Benchmark levels for partner availability.

Fig 5.2 Regional Client Service Score compared to UK Benchmark | All practice areas

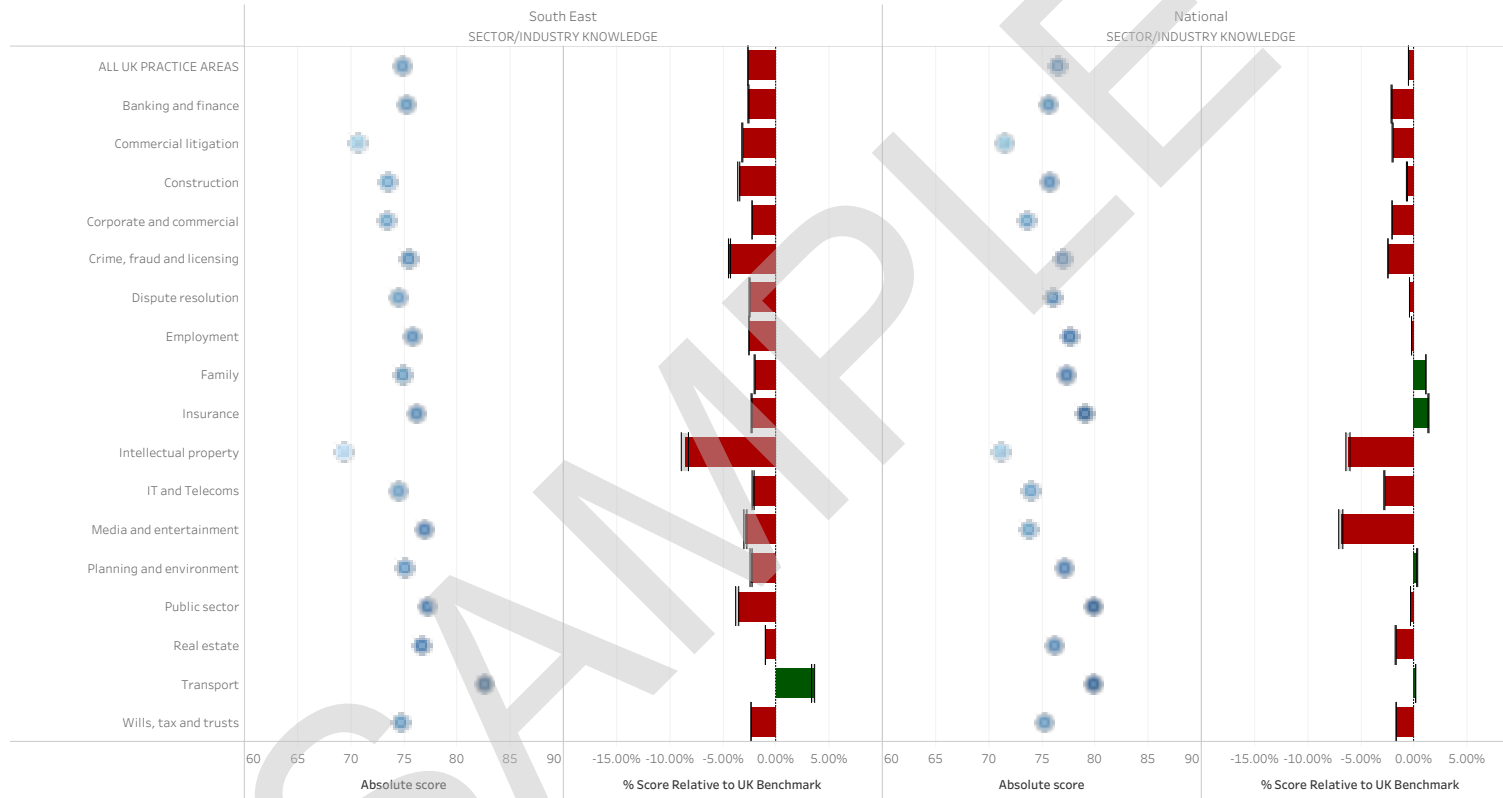


It's demonstrably harder to please clients across the UK in some practice areas than others. Outside London, client satisfaction scores for practice areas such as Competition, IT and telecoms, and IP are generally relatively low.

In Northern England, which tends to have higher scores as a general rule, some practice areas such as transport are weaker, while in Southern areas, which tend to have lower scores across the board, those transport scores are higher, indicative of expertise shifting according to market needs in different parts of the UK.

Meanwhile some practice areas attract high levels of client satisfaction wherever you are in the country - notably general corporate and commercial work and some private client practice areas such as Family and Wills, tax and trusts.

Fig 7.3 South East v national firms | SECTOR/INDUSTRY KNOWLEDGE OVERALL



Amongst South East firms, few departments manage to match or exceed UK Benchmark scores for sector/industry knowledge, with the exceptions to be found in transport departments (where by contrast UK-wide practices do not achieve parity with Benchmark scores).

Though they do not match Benchmark scores, media and entertainment teams at local firms in the South West considerably outperform national practices. By contrast insurance and family teams at UK-wide firms score well

above UK Benchmark levels, where local firms fall short. IP teams at both types of firm record some of the lowest scores overall.

A glance at the industry/commercial knowledge chart on the following page suggests that here is where firms in the South East underachieve relative both to national practices and UK Benchmarks. The picture improves somewhat for profile in the sector.

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

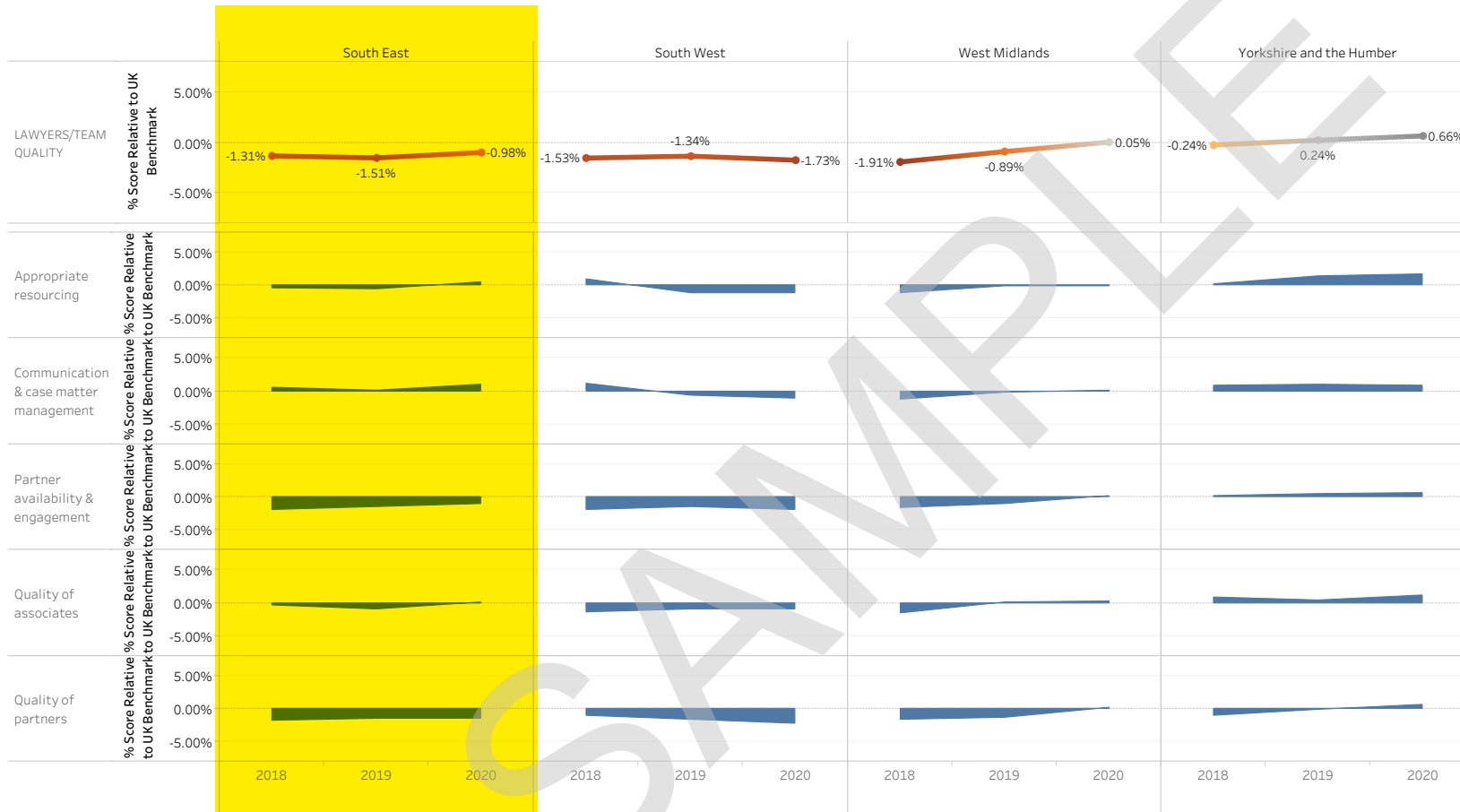
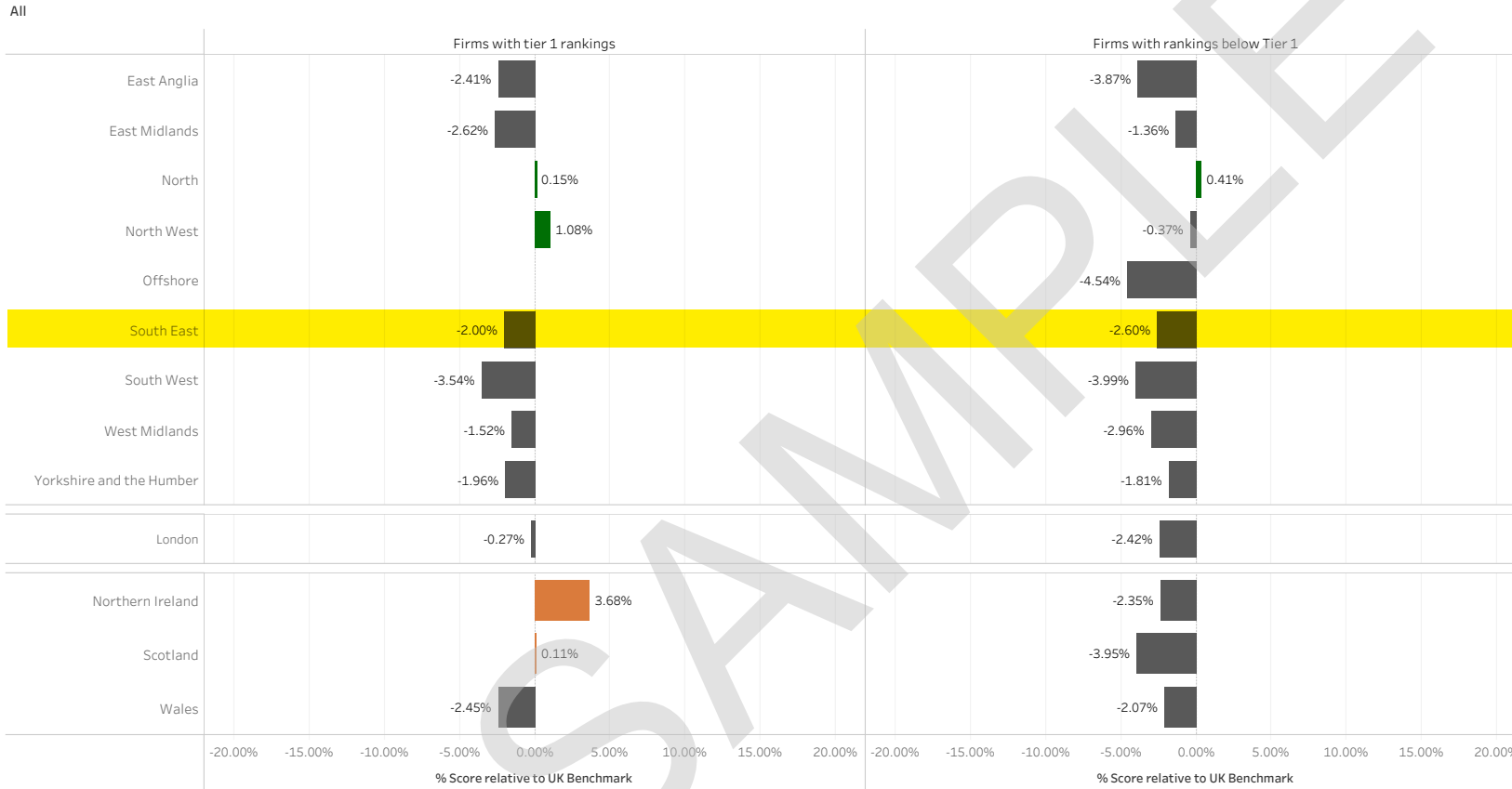


Fig 10.1 Regional/National Client Service scores for top tier and other tier firms compared to UK Benchmark | All practice areas

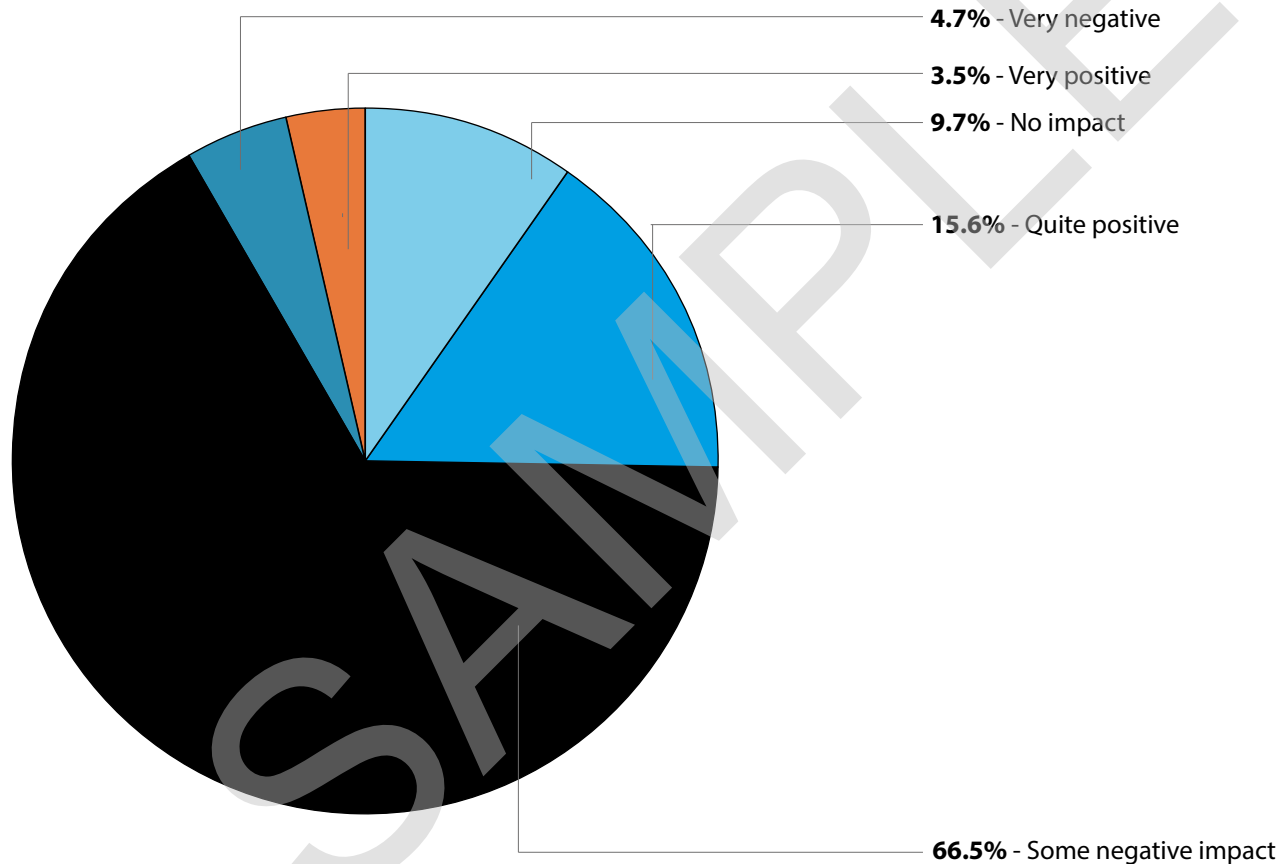


The Legal 500's law firm rankings are the measure of a law firm's capacity to take on complex instructions, its bench strength, quality, market share and track record.

Part 10 of our Client Satisfaction report assesses how top tier rankings may correlate (or otherwise!) with clients' perception of the standard of the service they receive, by practice area.

Taken in the round, firms below the top tiers across the UK score a little below top-tier firms, though there are some exceptions to this in some parts of England and Wales, and the gap in perceived client service varies.

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”.