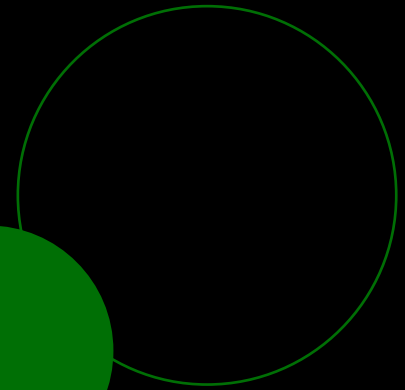
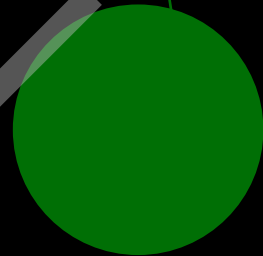
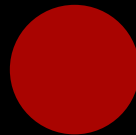
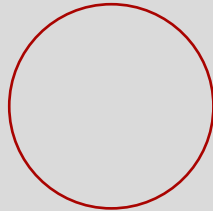


LEGALEASE RESEARCH SERVICES



**SOUTH WEST
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 West. 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

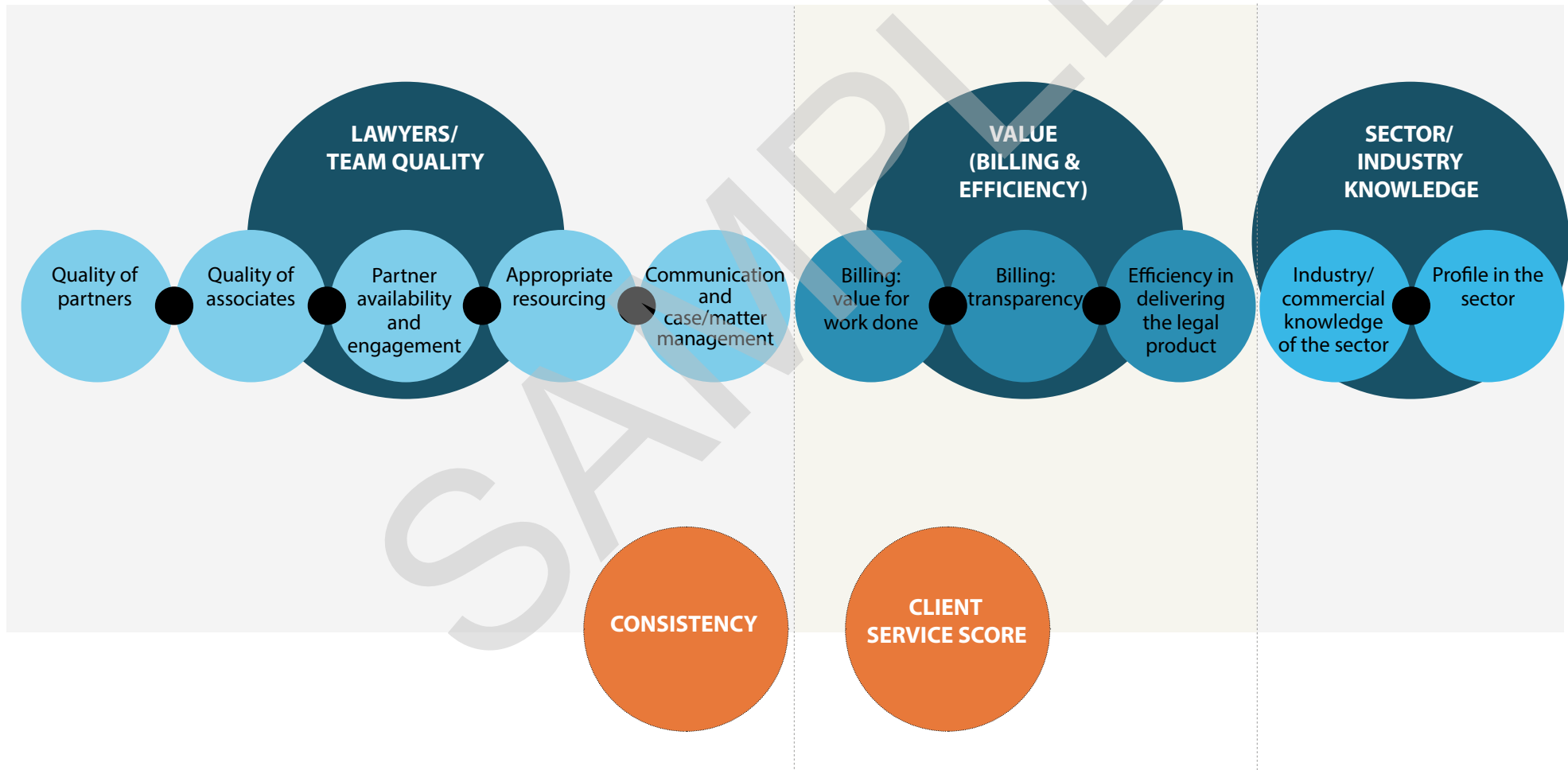
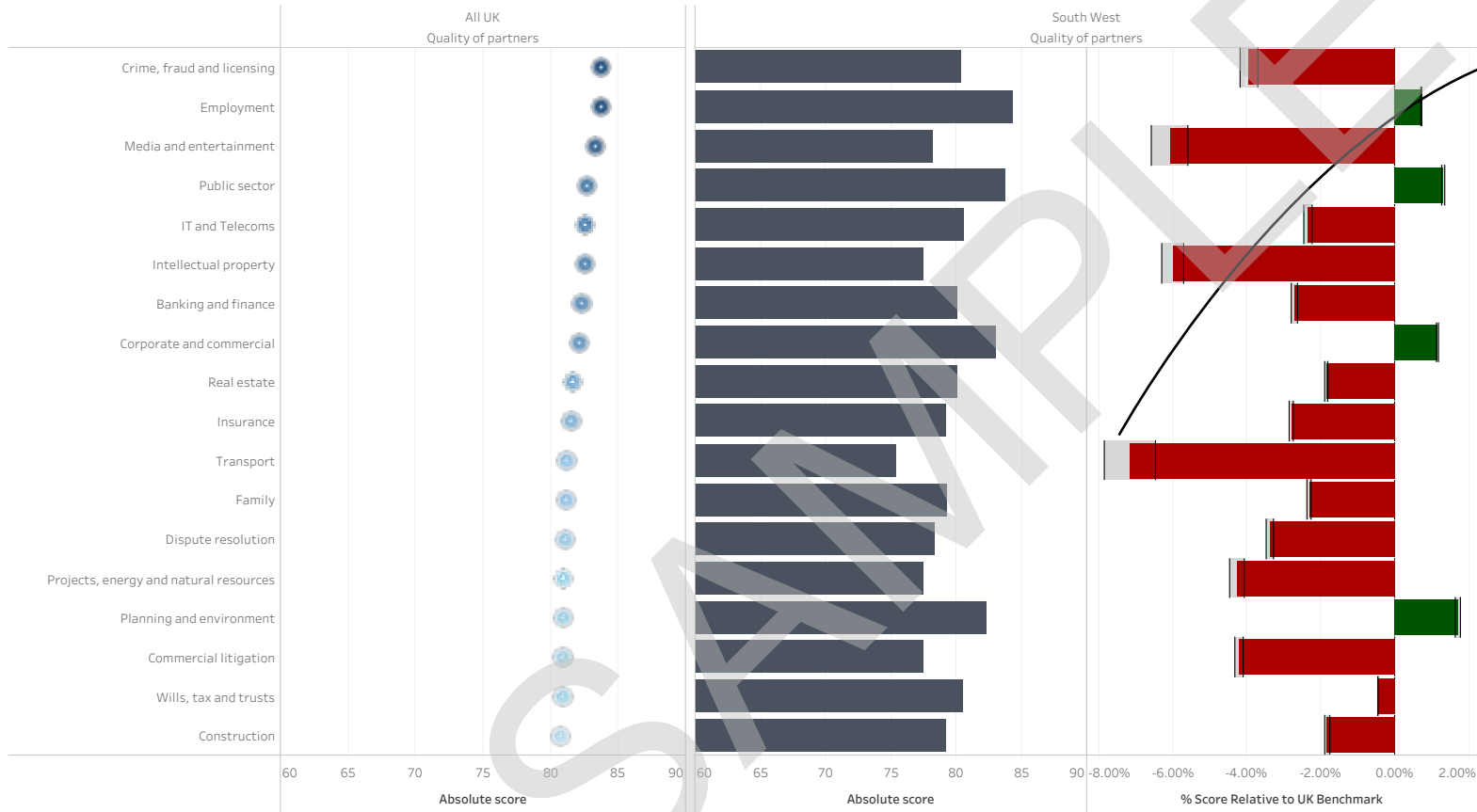


Fig 3.1.1 South West Client service by practice area compared to UK Benchmark | Quality of Partners

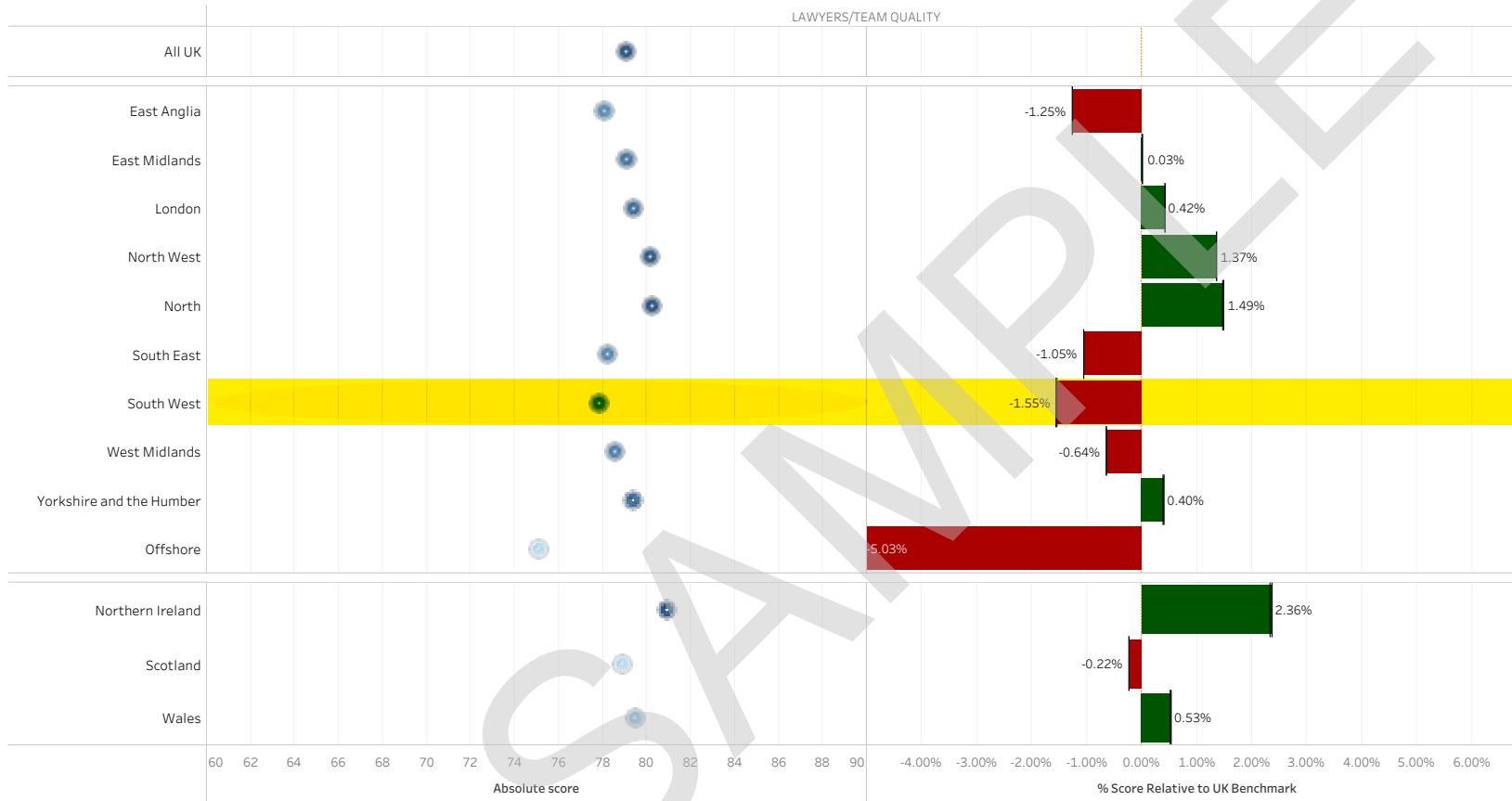


Grey banding on the bar chart indicates possible statistical deviation of this score within our 95% certainty range. See methodology on p.4 for more details.

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 West planning, corporate, public sector and employment partners are all rated above the UK Benchmark figure. Meanwhile transport partners are scored significantly below.

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



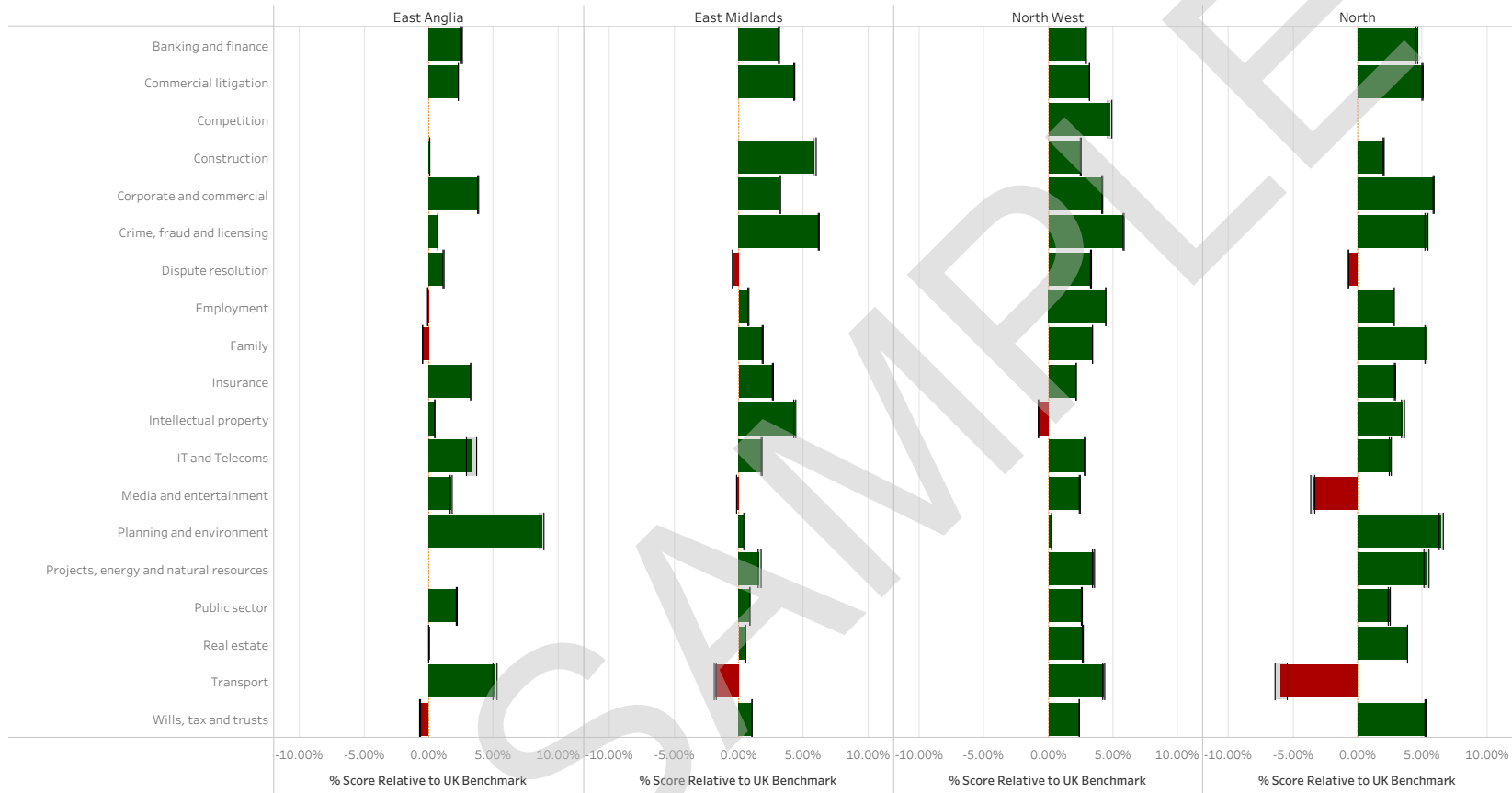
Part 4 of our report measures South West firms' performance across each client criteria against other parts of the UK, including London.

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.

South West scores are highlighted in yellow on each chart. Here they fall short of UK Benchmark levels.

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

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

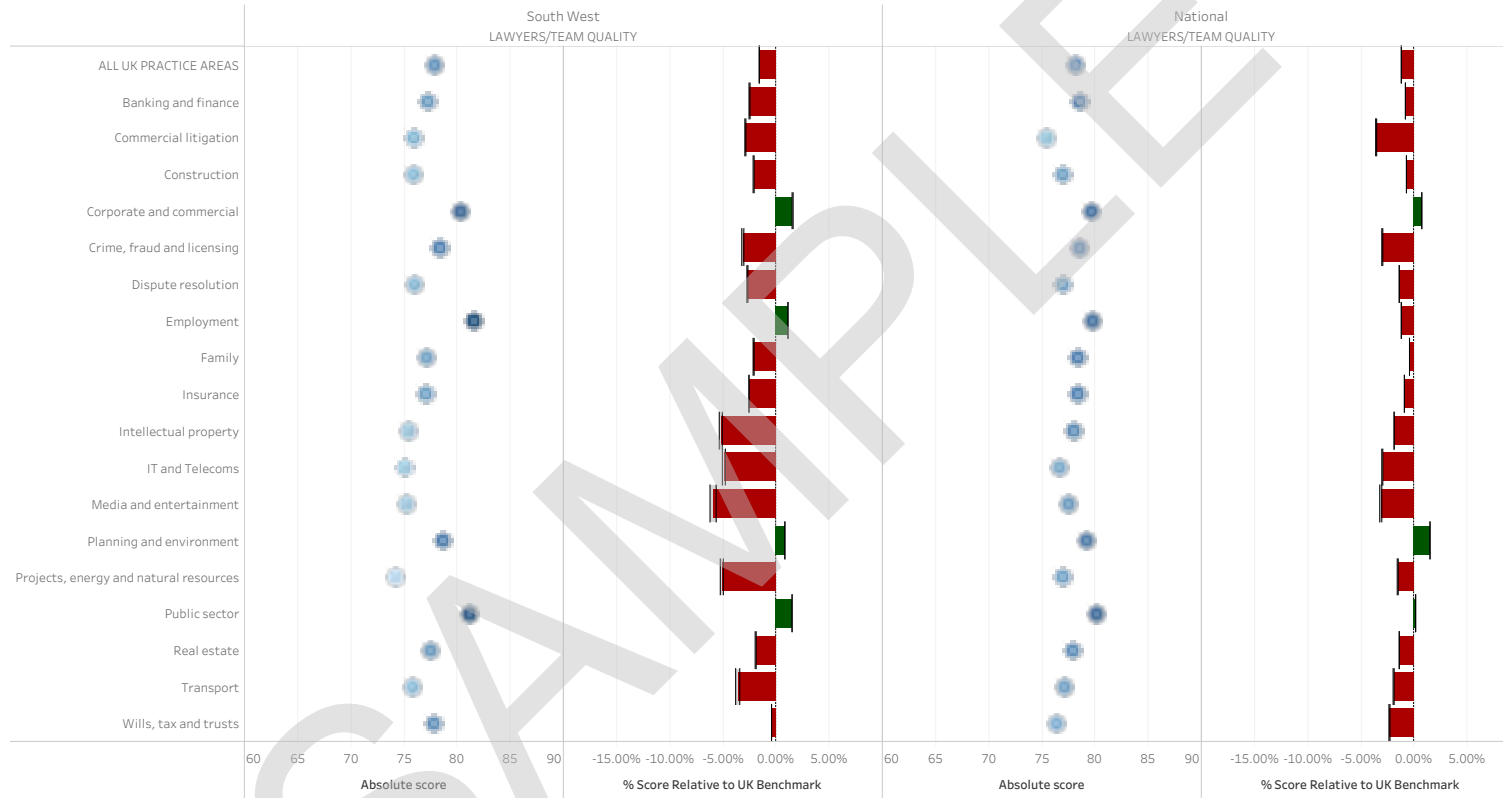


Across different regions of the UK, different practice areas stand out as local specialisms even within areas that perform relatively poorly overall. North West attracts lower scores relative to UK benchmarks overall and in that context its planning teams score very favourably.

Northern parts of the UK deliver the best all round scores across the widest range of practice areas, with the North and North West both scoring above the UK benchmark scores for the vast majority of practice areas listed.

Firms in the South East score above the UK benchmark in ten practice areas.

Fig 7.1 South West v national firms | LAWYERS/TEAM QUALITY OVERALL



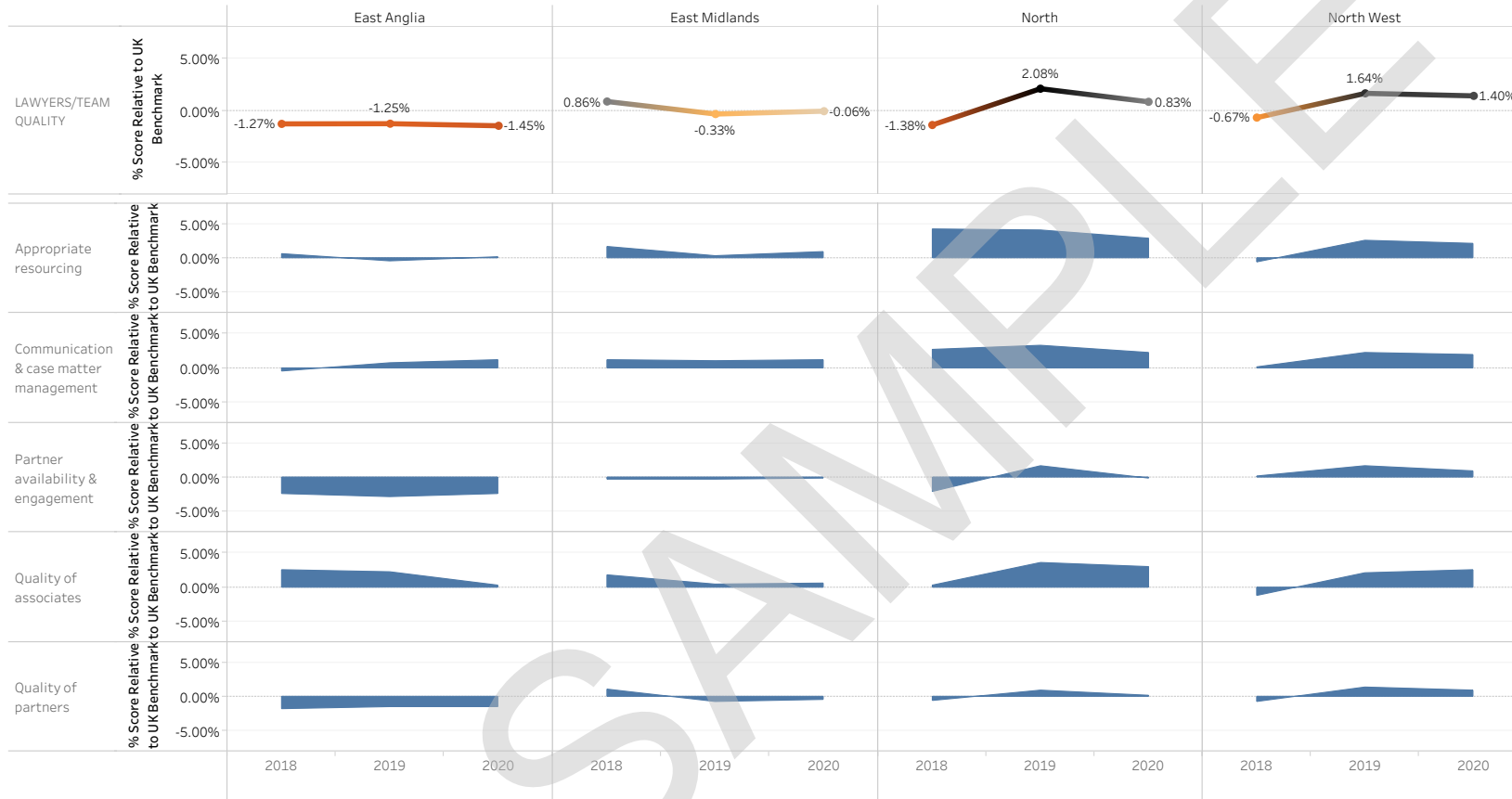
The visualisations in Part 7 break down South West firms' performance by practice area, in comparison with national practices. The blue pin markers display average scores for each practice area. The bar chart to the right-hand side illustrates how each score then relates to the UK Benchmark.

Fig 7.1 above shows that, relative to the UK Benchmark, the South West's overall quality of lawyers and teams is strongest in public sector and corporate and commercial departments. National teams meanwhile

outperform those at local firms for planning and environment work.

Meanwhile the widest variations in perceived quality of teams between local and nationwide practices occur in employment departments.

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



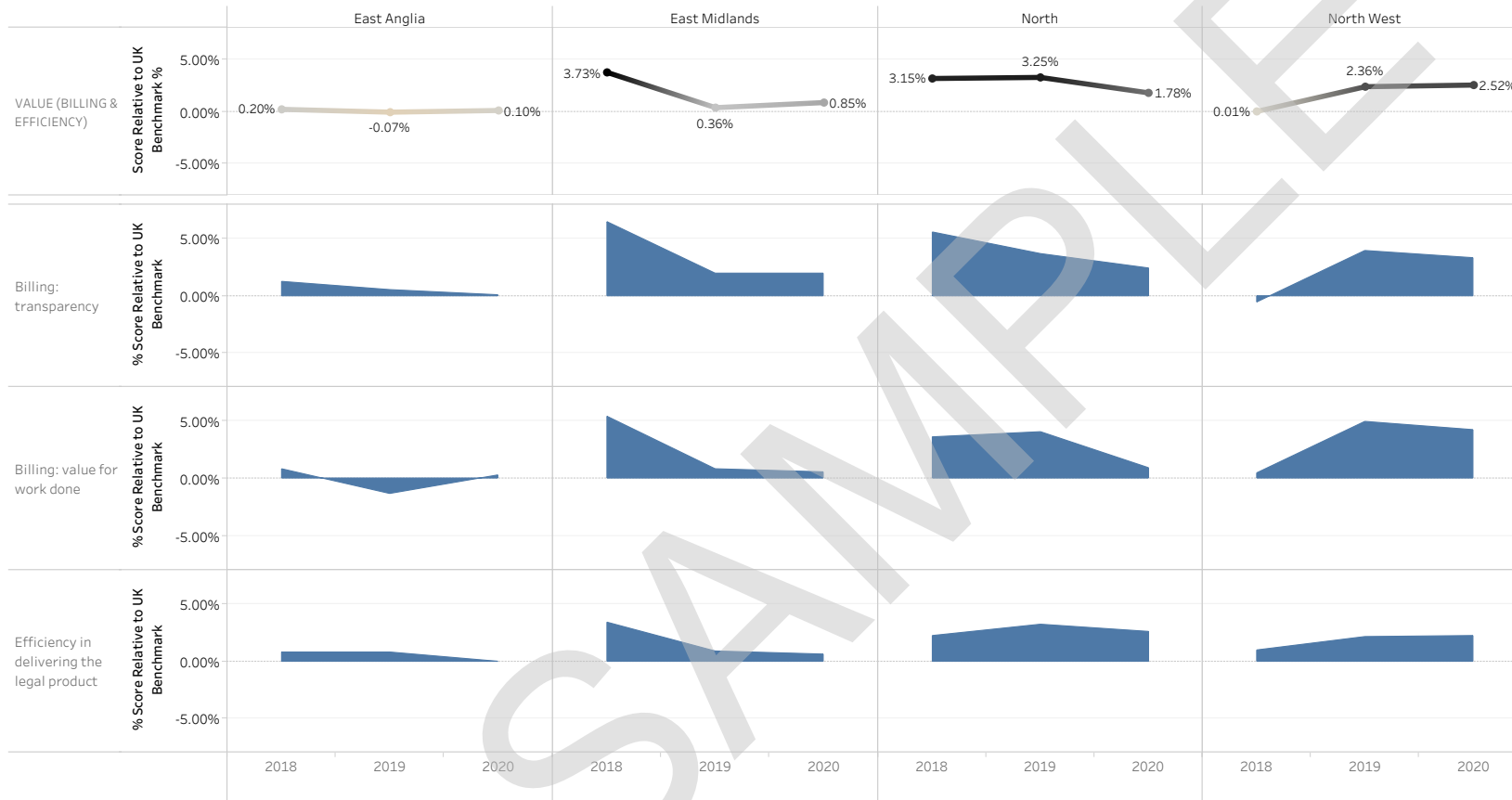
Part 9 of our report scrutinises regional differences between year on year performance across client criteria for all practice areas.

The data visualised here broadly supports findings in the data elsewhere; that northern England typically outscores southern regions, though for the North and North West scores overall are marginally down year on year for lawyers/team quality.

Elsewhere amidst largely static or marginally declining numbers, it is possible in most regions of the UK to detect improvement in scores within some criteria, communication in East Anglia for example, or resourcing in the East Midlands and South East of the UK.

The West Midlands joins northern regions of England displaying some of the sharpest rises in scores over the space of three years.

Fig 9.2 Regional/national year on year client service scores 2018-20 | VALUE (BILLING & EFFICIENCY) OVERALL



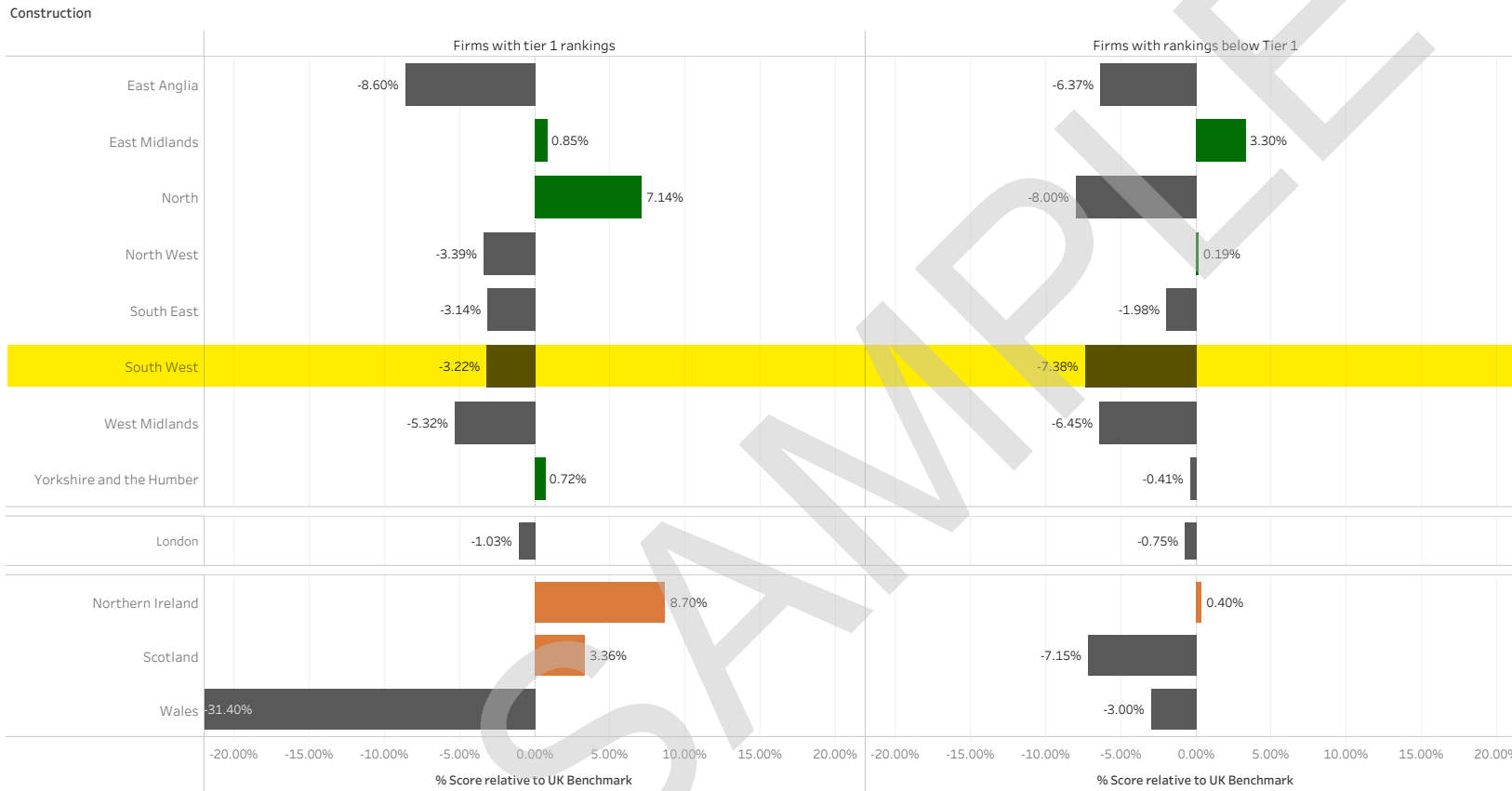
Scores for value (billing & efficiency) have typically been rather more volatile for some areas of the UK than has been the case for other criteria. Once again the North of England leads the way with some of the highest scores, though modest declines are visible over the past 12 months.

Parts of England with weaker scores such as the South West have seen modest improvements since 2019, but started from a lower 2018 base.

At a national level, Northern Ireland and Wales boast the best overall performance in terms of value for money.

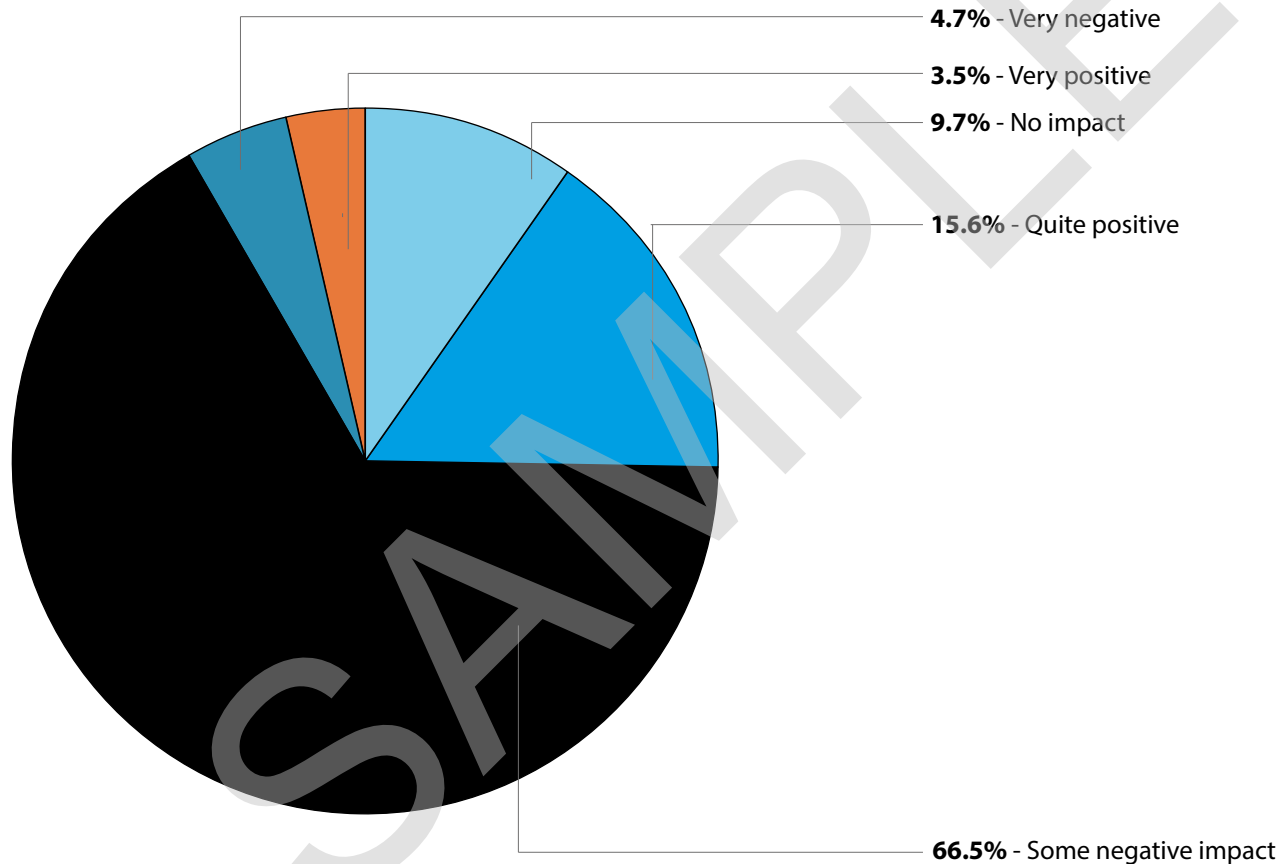
While London's lower scores for billing transparency and value may feel predictable, the fact is the capital's scores for efficiency do not quite match UK Benchmark levels for 2020 either.

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”.