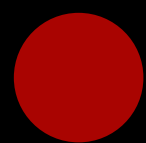
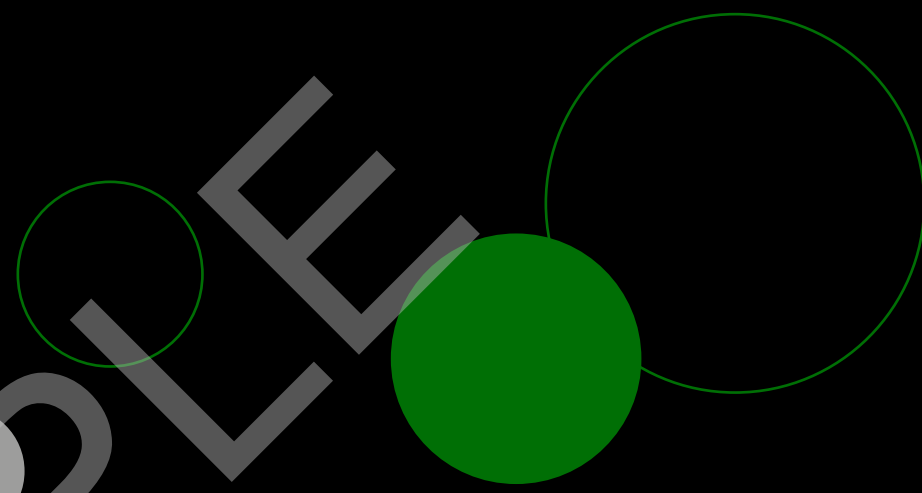
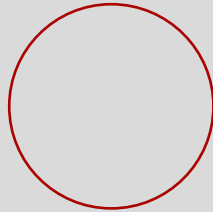




LAW FIRM ANALYTICS



WALES

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 Wales. 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

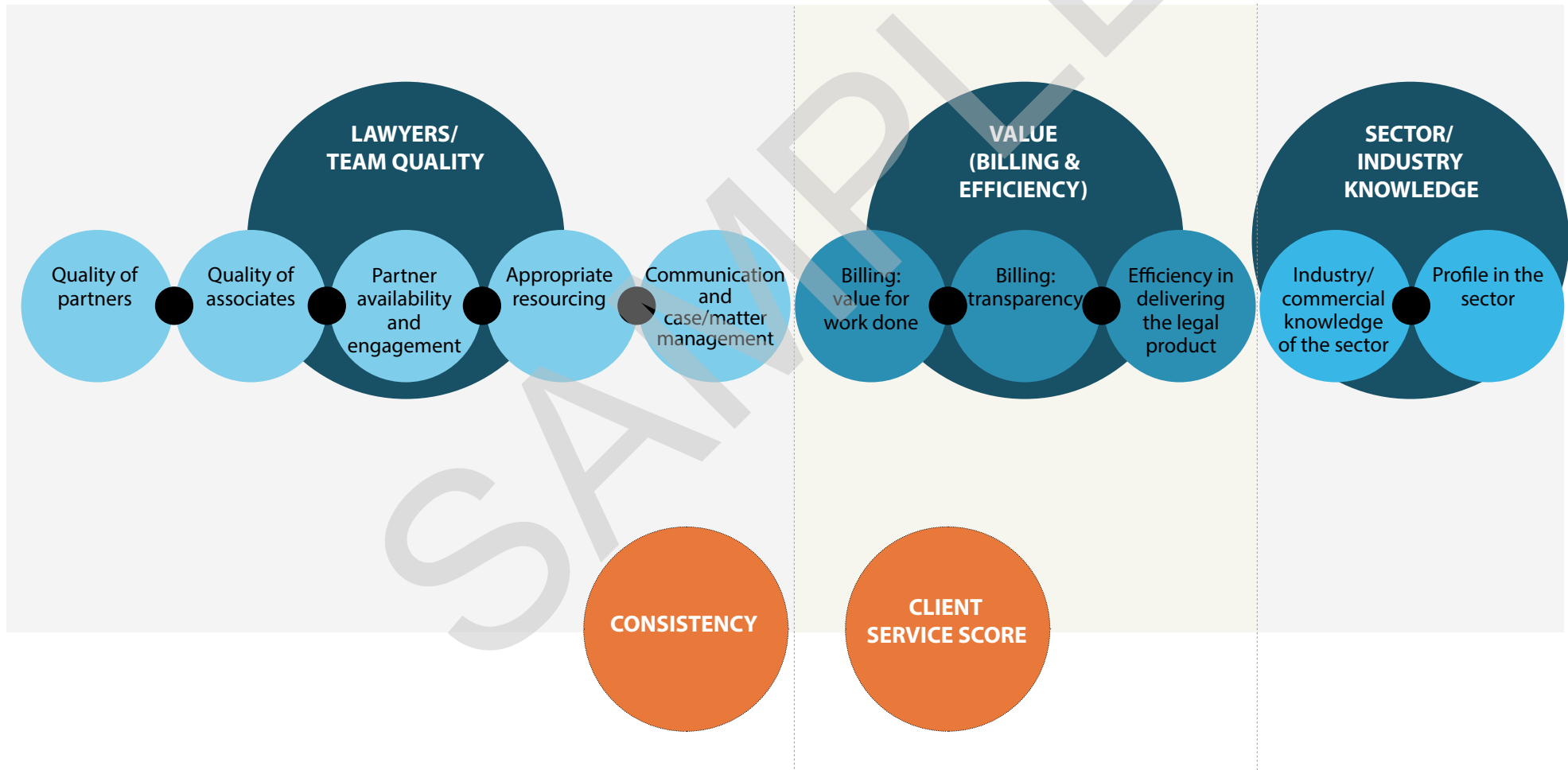
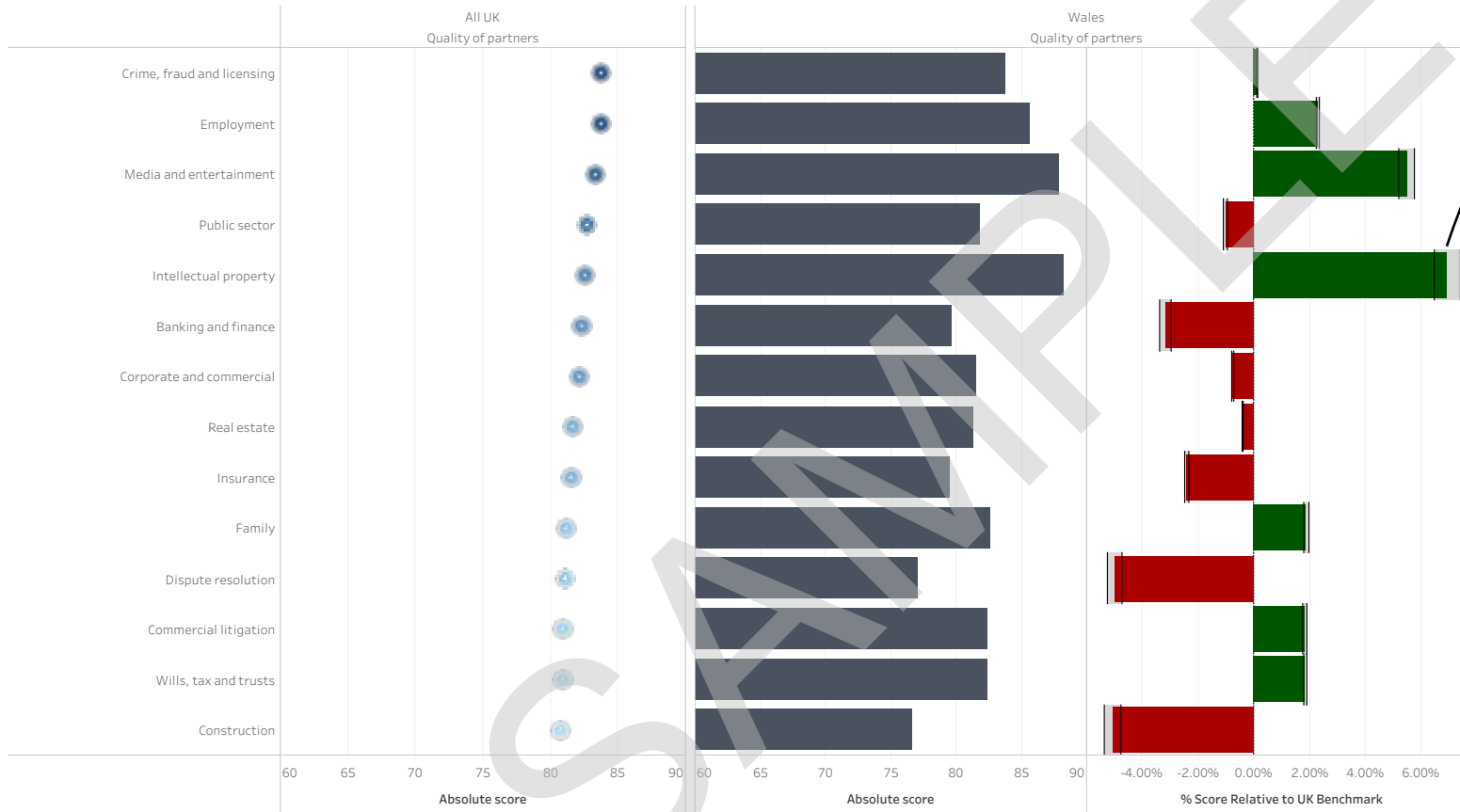


Fig 3.1.1 Wales Client service by practice area compared to UK Benchmark | Quality of Partners

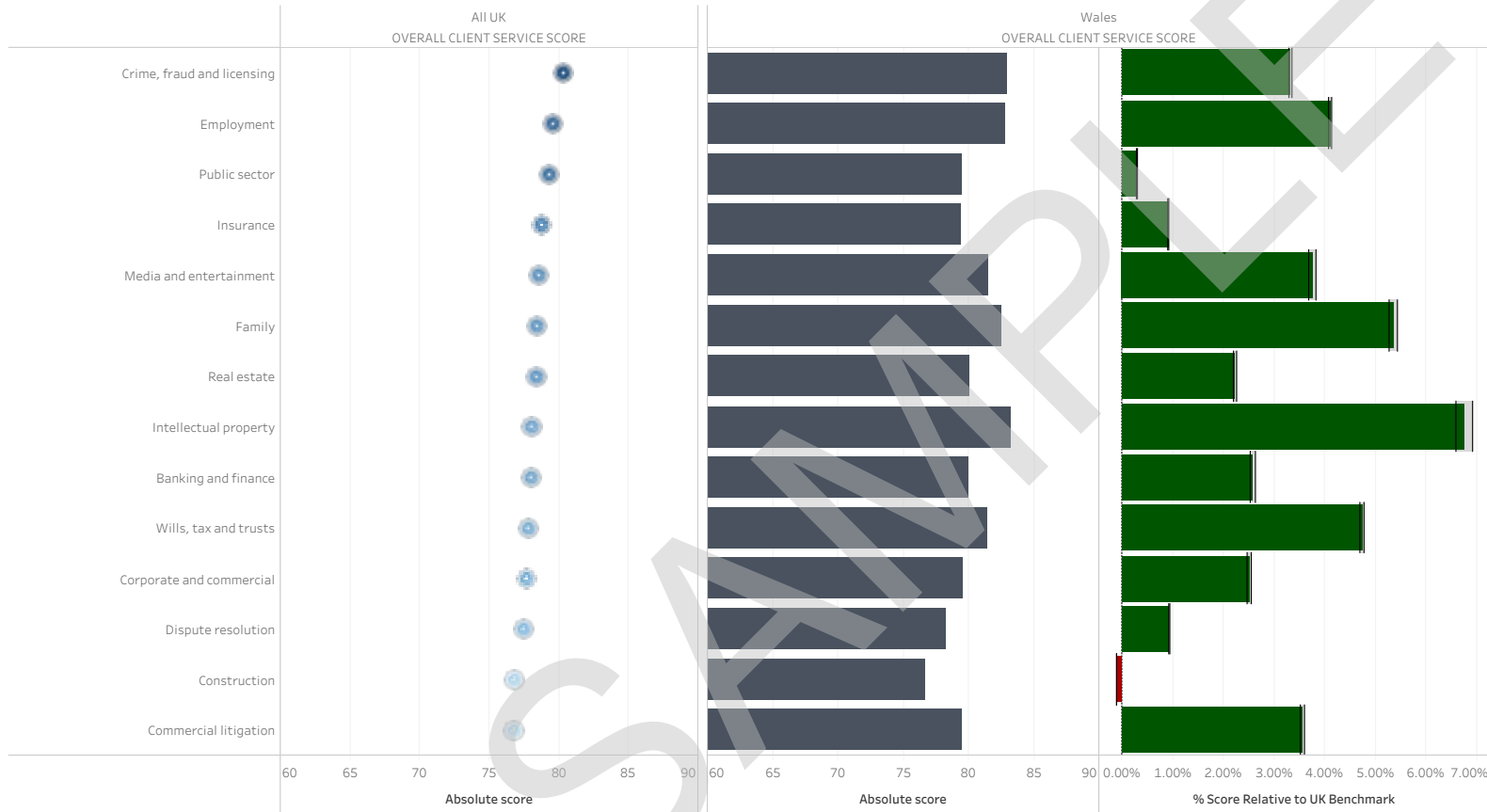


Grey banding on the bar chart indicates possible statistical deviation of this score within our 95% certainty range. See methodology on p.4 for more details.

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 Wales, employment, intellectual property, and media and entertainment partners are all rated above the UK Benchmark figure. Meanwhile dispute resolution and construction partners are scored significantly below.

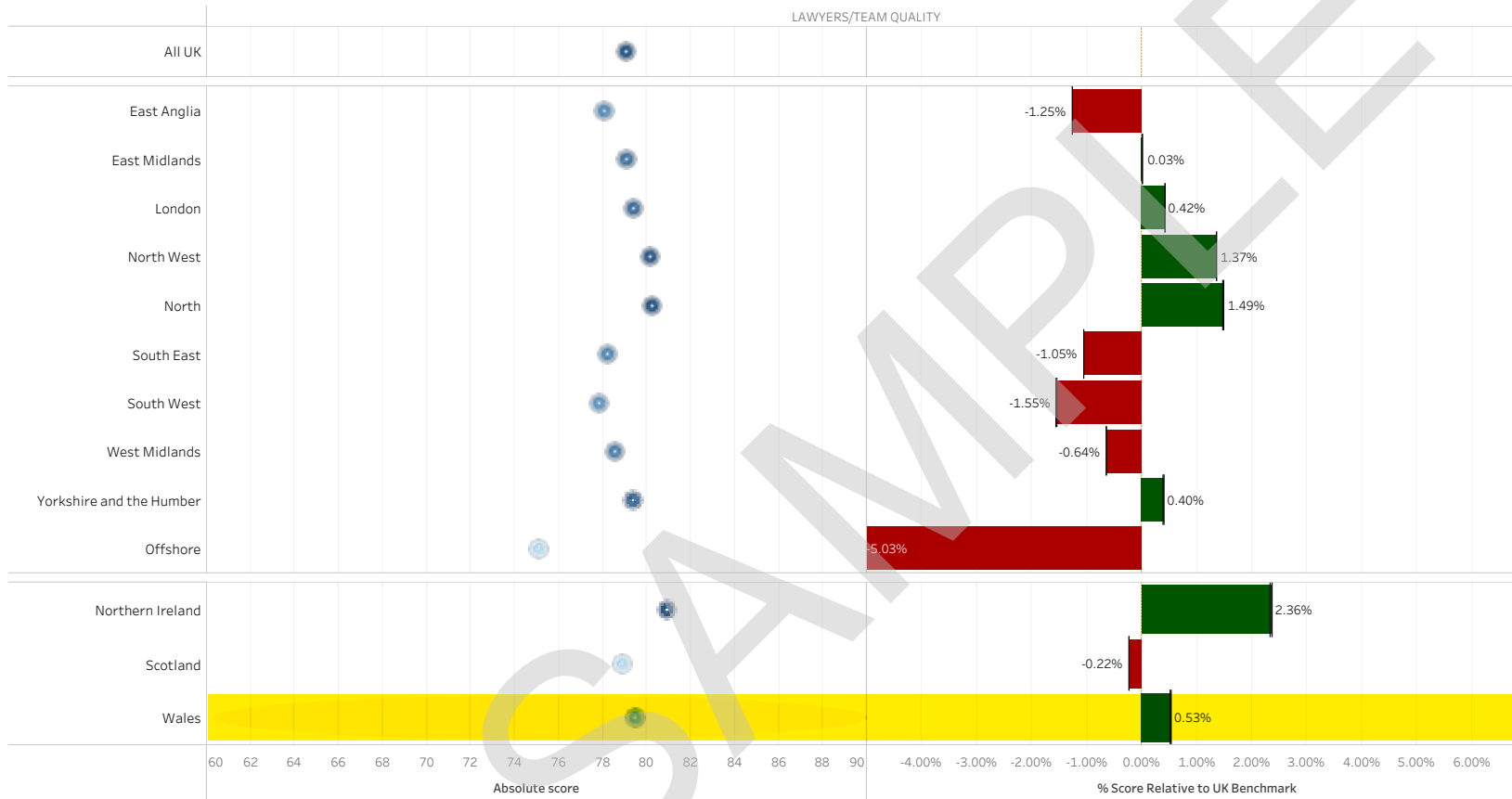
Fig 3.4 Wales Client service by practice area compared to UK Benchmark | CLIENT SERVICE SCORE OVERALL



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 Wales.

These scores reinforce the conclusions derived from previous pages, that Welsh firms excel across the board for client service in almost every practice area. IP and family practices are notable leaders, and even the lowest scoring practice area (construction) sticks very closely to UK Benchmark scores.

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



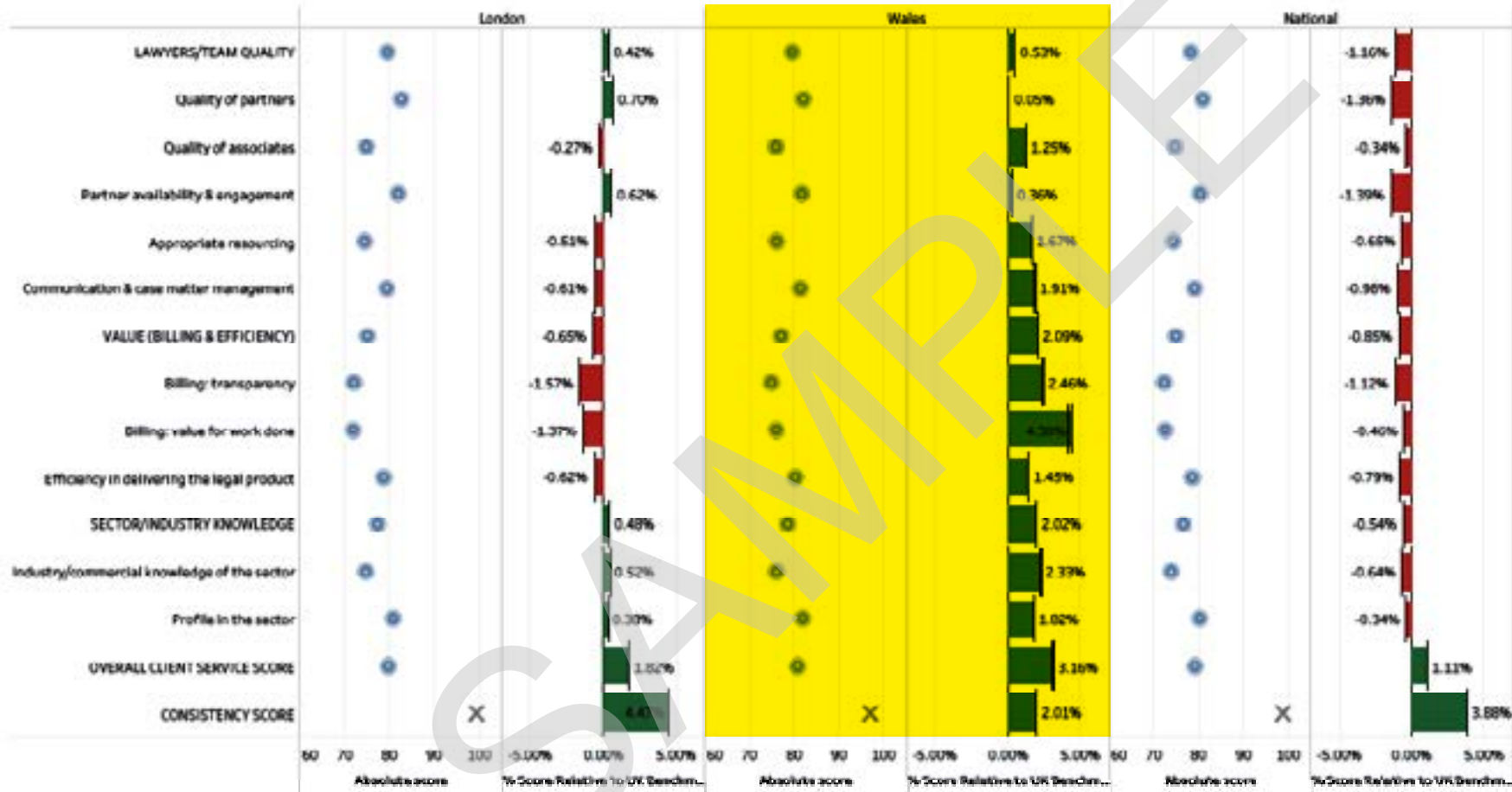
Part 4 of our report measures Welsh firms' performance across each client criteria against other parts of the UK, including London.

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.

Wales scores are highlighted in yellow on each chart. Here they exceed 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.

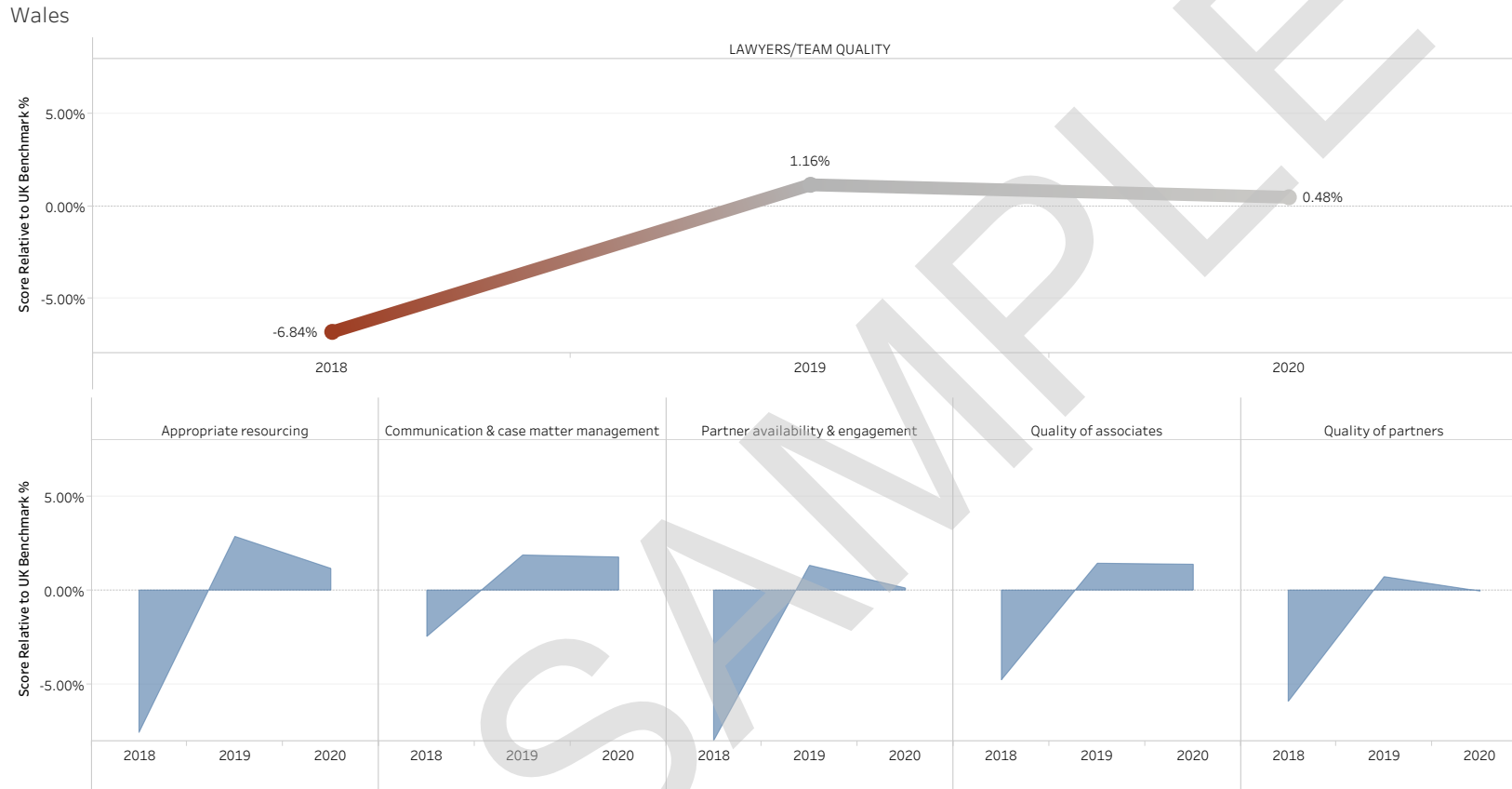
Fig 6.1 London and Wales v national firms | All client service criteria



The visualisations in part 6 measure the perceived client service performance of firms local to different home nations and regions of the UK against national practices offering legal services in those nations and regions. The pin marker charts to the left show absolute scores and the red and green bars to the right show performance relative to UK Benchmarks. What is clear is that local firms typically outscore UK-wide practices for most criteria.

Welsh law firm scores, which consistently exceed UK Benchmark levels, also improve on those posted by UK-wide practices specifically, and particularly with regard to criteria related to value for money. Meanwhile Northern Ireland and Scotland both attract higher scoring across all client criteria than UK-wide practices, and firms in London more closely match national firms.

Fig 8.1 Wales client criteria scores Year on Year | LAWYERS/TEAM QUALITY OVERALL



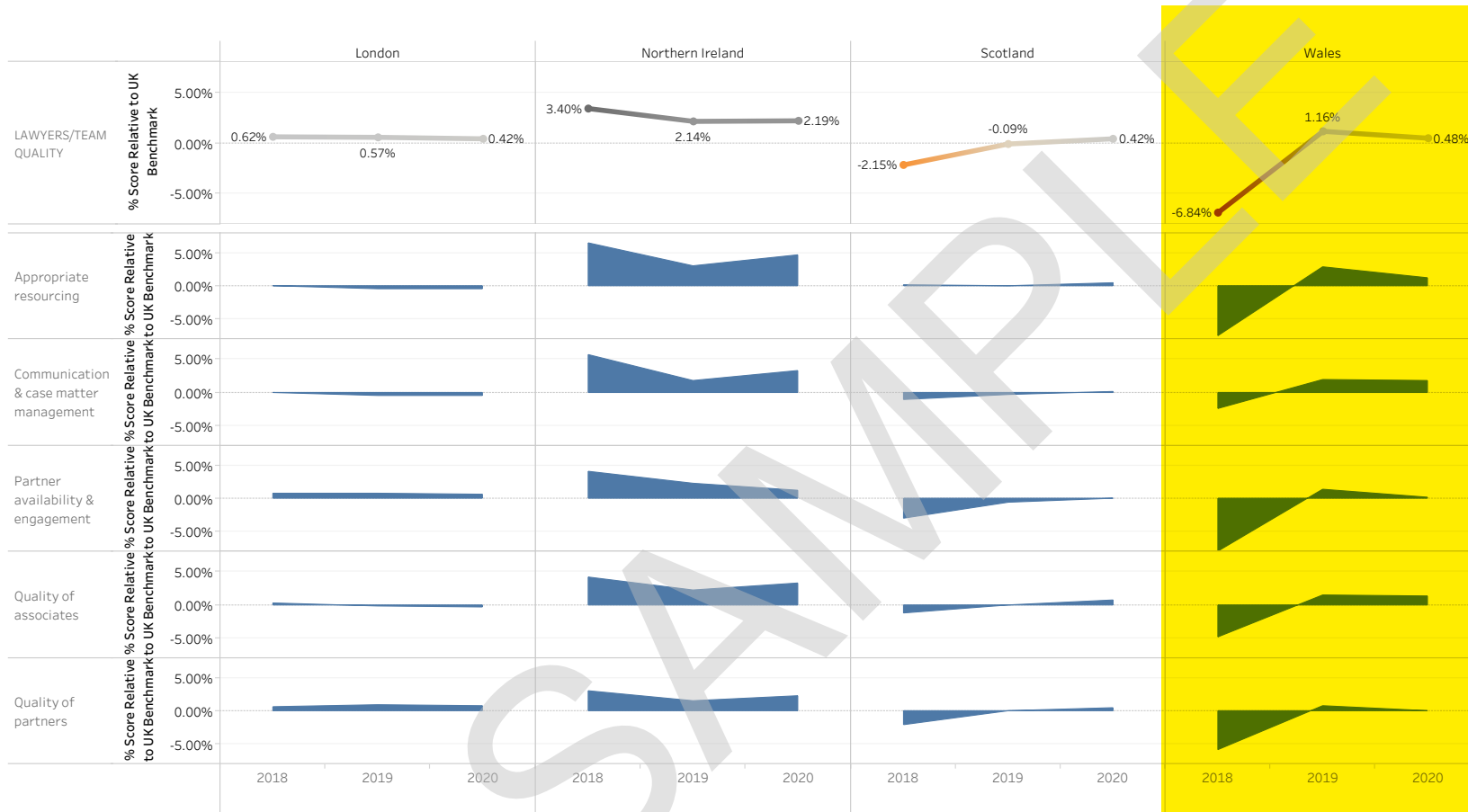
The Legal 500 has been compiling client satisfaction scoring data since 2018, allowing us to present year on year assessments of changing views of client service.

Part 8 of our report records year on year variation by Client Satisfaction Criteria across all practice areas.

In this visualisation the black line indicates the overall trend for the main Client Satisfaction Criteria, with more detail provided below with the blue pillars for each specific criteria, and improvement or otherwise illustrated by the angle of the pillar.

Welsh clients' assessment of overall team quality has improved dramatically since 2018. While perceived quality of partners has inched down slightly in the past twelve months, substantial increases in communication, engagement and resourcing scores are clear over a three year period.

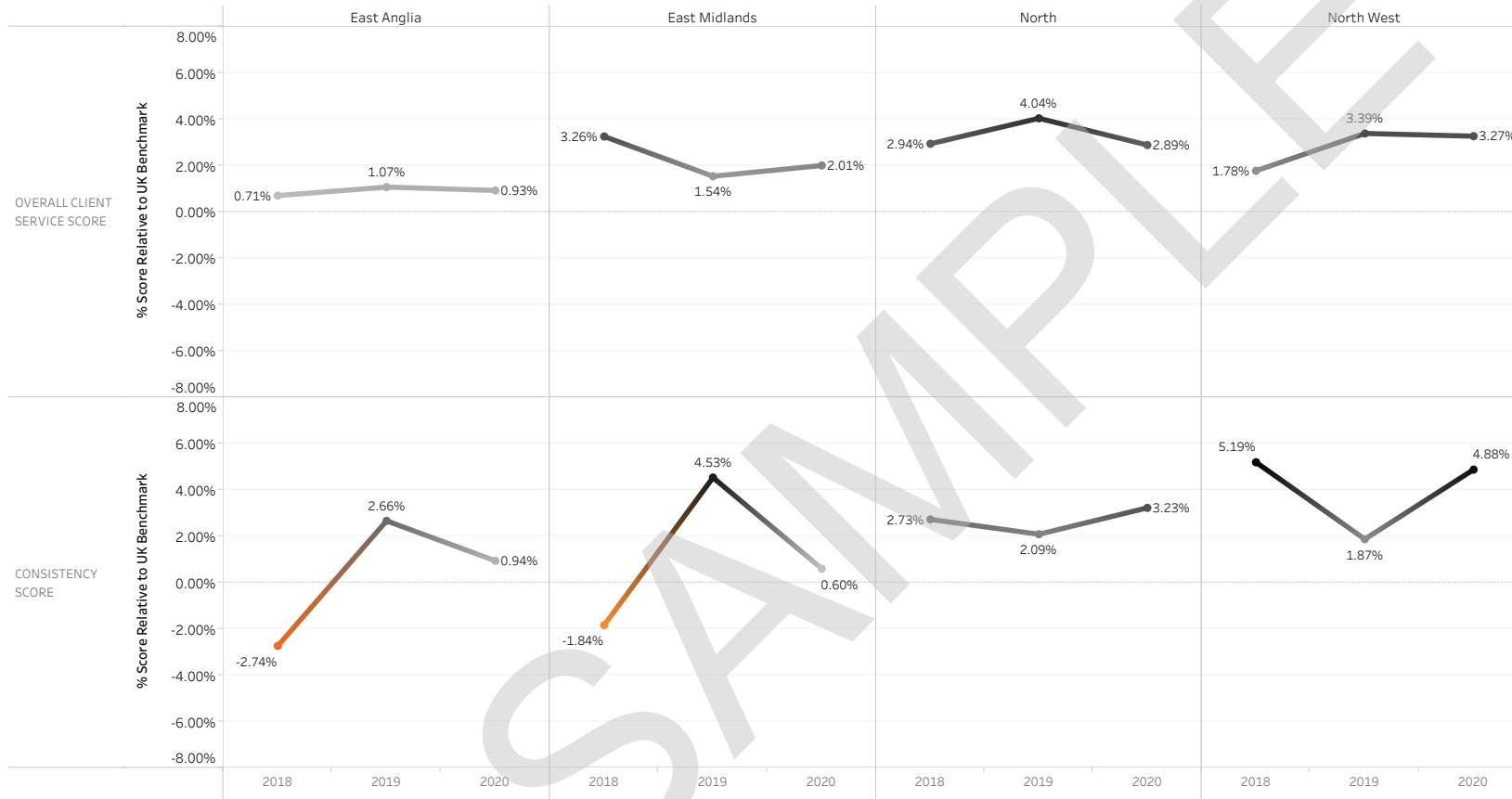
Fig 9.1 Regional/national year on year client service scores 2018-20 | LAWYERS/TEAM QUALITY OVERALL



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 9.4 Regional/national year on year client service scores 2018-20 | CLIENT SERVICE SCORE

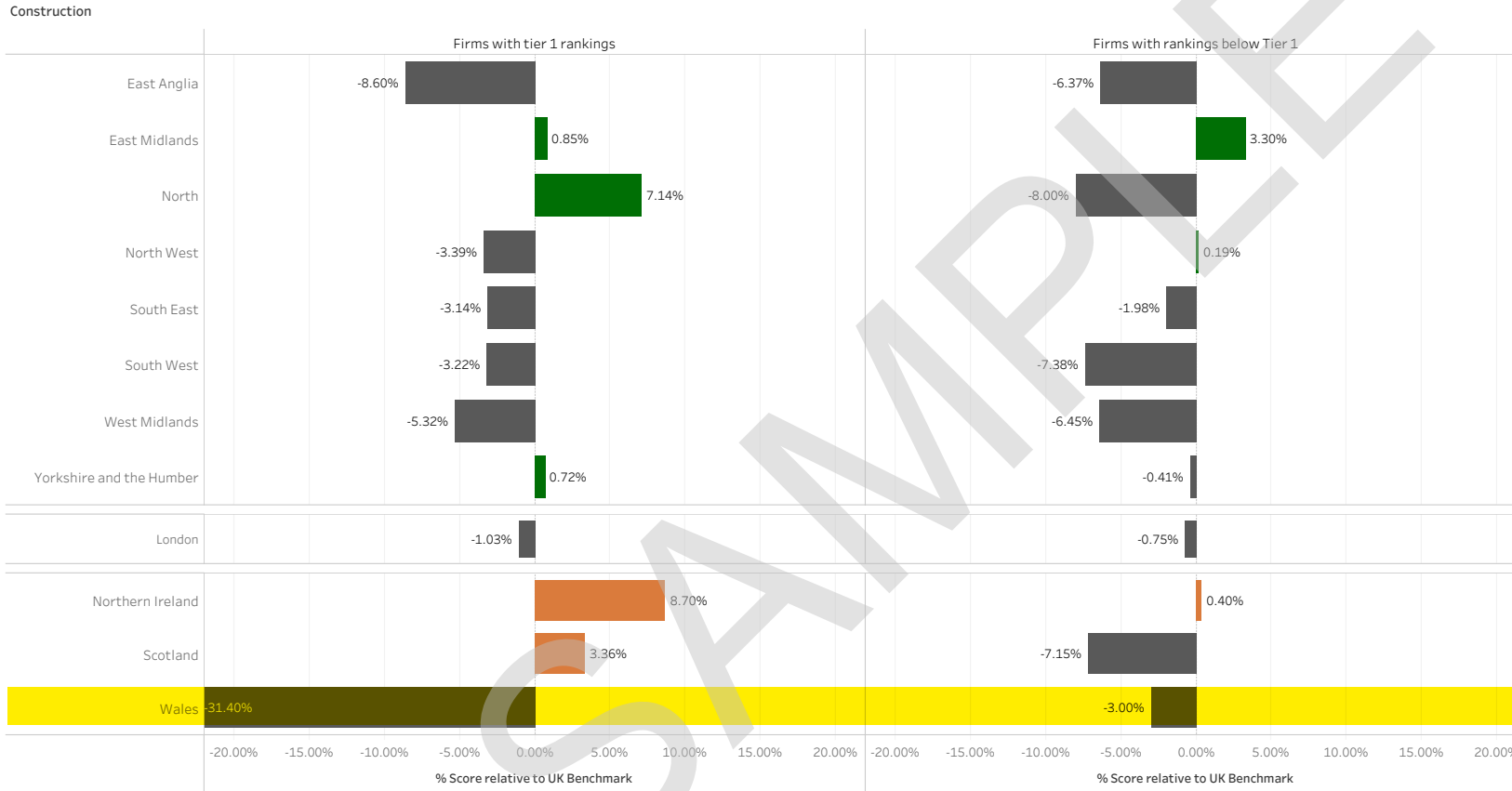


Client service scores across the UK are largely positive, with the biggest improvements in recorded client perception visible in the West Midlands and Yorkshire and the Humber.

Once again scores are lower in southern parts of the UK, though the South East has seen a marked uptick since 2019. Among the home nations, Northern Ireland's scores stand out, though Welsh and Scottish firms' scores demonstrate considerable improvement over three years.

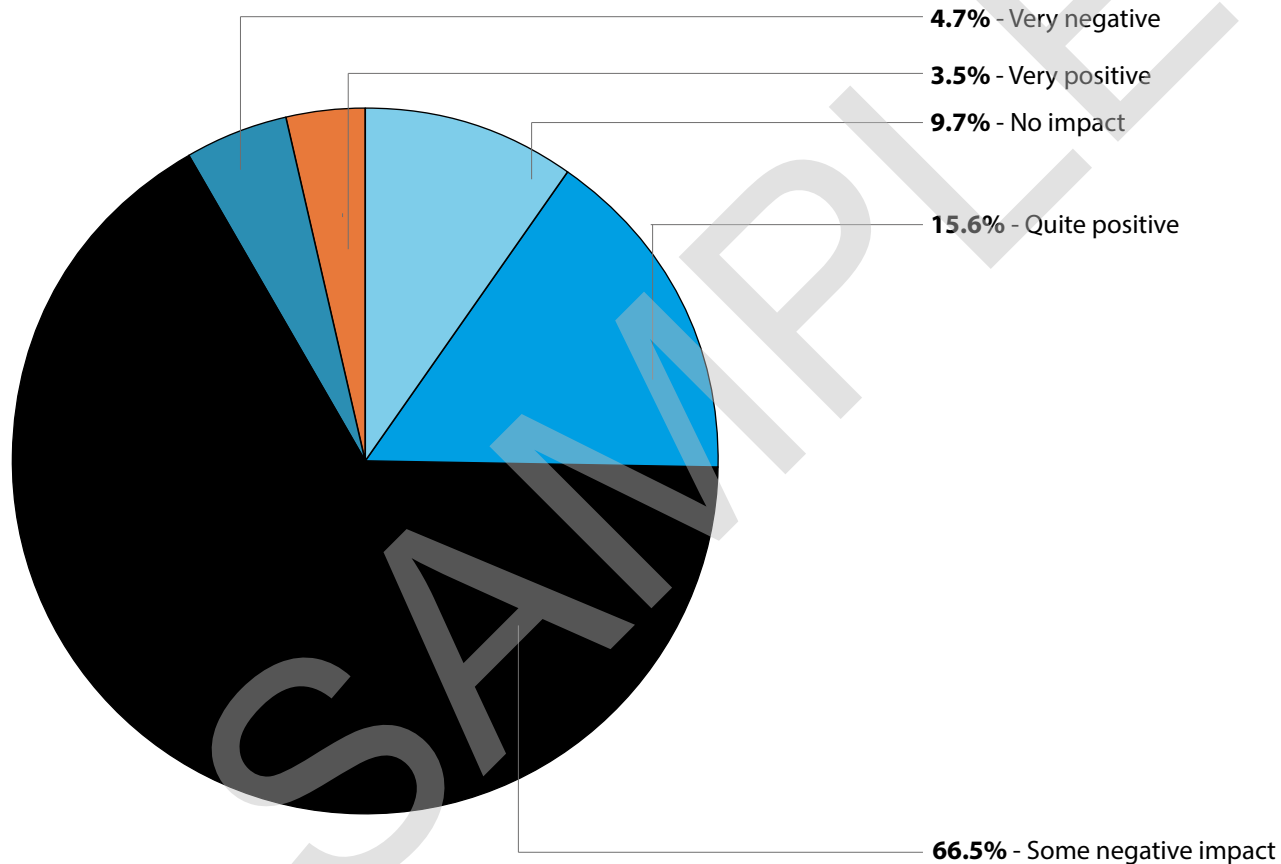
In terms of consistency, the picture across the majority of UK regions and nations is one of steady improvement, with clients offering a reliable consensus on the quality of the service. In the East of England scores have declined somewhat over the past 12 months, a characteristic shared by scores in Scotland in the same period.

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”.