

● RESEARCH REPORT · 2026

Welsh Legal Sector Transformation Report 2026

Osprey Approach and Legal News Wales surveyed over 50 Welsh SME law firms and in-house teams on financial performance, pricing, technology, succession - and what the sector needs next.



Research conducted March – June 2026
Published in partnership by Osprey Approach and Legal News Wales

Two organisations, one shared question

How is the Welsh legal sector really changing – not the headlines, but what's actually happening inside the firms living it? This report brings together Legal News Wales's reach across the profession and Osprey Approach's view of how firms operate day to day, to find the answer.



Osprey Approach is the all-in-one legal accounting, practice and case management software for SME UK law firms. For over 30 years it has worked with firms to centralise and modernise how they operate, with one aim: to make running a law firm easier.

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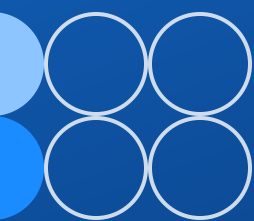
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What's inside

A guided route through the data and the analysis.

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Why we asked, and why now



Editor's foreword

Emma Waddingham · Editor, Legal News Wales

There is a great deal to be encouraged by in this research into the future of the legal sector in Wales.

The results do not portray a sector lacking ambition. Almost half - 47% - of respondents expect their organisation to grow over the next 12 months. However, look beneath that figure and the devil is in the detail: of those firms expecting growth, 67% are currently flat or have declined slightly this year.

For me, this is a theme running through the entire report. There is serious, justified ambition within the Welsh legal sector, but the next challenge is turning that ambition into sustainable, profitable growth. Asking harder questions about where value is being lost, whether firms have the right future leaders in place, and whether business models are equipped for what comes next. A sector average write-off rate of just under 14% - worth some £140,000–£150,000 a year to a typical firm - suggests some of that opportunity may already be sitting inside the business, not outside it.

The Welsh legal sector isn't short of ambition. Our challenge now is turning that ambition into sustainable, resilient legal businesses, while keeping legal services accessible for the future.



A word from Osprey Approach

Chelsea Goldsby · Operations Director, Osprey Approach

Digital maturity isn't just an efficiency question for Welsh law firms anymore, it's a question about who shapes the next decade of this sector, rather than simply adapting to it. What struck us most in this research is the appetite firms have to experiment and adopt new tools to perform better. The gap isn't ambition, it's clarity: dedicated time and resource to keep reviewing what's working, what isn't, and where to invest next with confidence.

The events we've run across Wales show a hunger for innovation and a willingness to share that we don't see elsewhere in the UK. Firms compare notes openly rather than guarding an edge competitively. That kind of openness can't be manufactured, and Wales already has it. It's exactly the foundation you'd want if you're serious about building a sector people are proud to be part of, and one that gives the next generation of talent a real reason to build their career here.

The firms who pull ahead are rarely the ones with the most tools. They're the ones who understand what they've already got well enough to invest in it deliberately. We're proud to be part of that foundation for so many firms already, and to be part of the collaborative spirit driving this sector forward.

The Welsh legal sector: confident, not complacent

This report looks solely at the Welsh legal sector for the first time in a while. Osprey Approach and Legal News Wales surveyed over 50 Welsh SME law firms and in-house teams - from sole practitioners to firms with over 150 fee earners - on everything from financial performance and pricing to technology, succession, and what they think the sector needs next. What is revealed is not a sector in crisis, and it isn't a sector coasting either. The insights give a clear, evidenced picture of where Welsh firms are genuinely strong, where the pressure is real but shared, and where the next few years of opportunity are most likely to be won.

48%**Expect to grow next year**

Two-thirds of them are flat or slightly down this year.

100%**Find recruiting solicitors difficult**

Nobody in the survey said it was easy.

14%**Of annual billing written off**

Around £150,000 a year for a £1m+ firm.

42%**Have no dedicated tech role**

Two-thirds decide on technology without a specialist.

The three themes

01**Pricing is a strategic lever, not a default**

Billable-hour firms saw no improvement at all; hybrid models performed best.

02**A pipeline that is thin at both ends**

Every firm finds recruitment hard, and 42% have no succession plan.

03**Capable on technology, unclear about it**

Strong core systems, but confidence is highest where scrutiny is lowest.

How to use this report

Every firm reading this already has a feel for how the last year went, and a hunch about what is coming next. What is harder to know from inside your own firm is whether that hunch matches the sector. This report is built to answer exactly that, enough detail to place your own firm inside it, on pricing, recruitment, technology and opportunity.

How we gathered the data

Before we share the findings of the Welsh Legal Sector Transformation Report 2026, here's the how: who was asked, when, through which channels, and the ground rules we set for reporting it honestly.



01 • The survey

46 questions covering performance, pricing, technology, people and succession.



02 • Reaching firms

Distributed through Legal News Wales, Osprey Approach and sector events.



03 • Interviews

Follow-up conversations with a cross-section of respondents.



04 • Analysis

Anonymous throughout, and unweighted.

Respondents were self-selected through industry and vendor networks rather than randomly sampled, so the sample likely skews slightly more engaged with sector news and technology than the Welsh legal market as a whole.



Reading the charts

Percentages are of respondents answering that question, not of all 51 firms. Where a question allowed multiple answers, totals exceed 100%.

51

Completed responses

46

Questions asked

Who answered the survey

51 firms responded, and the shape of the sample broadly mirrors the shape of the profession in Wales - weighted towards smaller, owner-led practices in the south east.

04

Fee earners in the organisation



2 – 10	38%
11 – 30	30%
31 – 50	18%
51 – 80, sole practitioner & 150+	14%

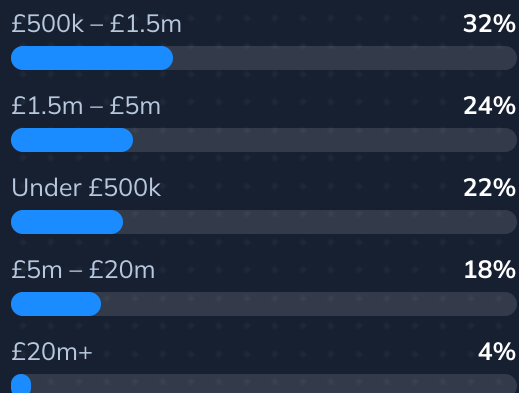
Head office location



Role of respondent



Annual turnover



Type of organisation



Ownership structure



24% undertake legal aid work

A sector holding its nerve

Nearly half of firms expect to grow in the next 12 months - but most of that optimism is a bet on a turnaround, not momentum already in hand.

Starting with the headline mood: nearly half of respondents (47%) expect their organisation to grow over the next 12 months. An encouraging number for a sector that spends a lot of time reading about squeezed margins and rising costs.

Dig one layer deeper, though, and the story shifts a little. Of the firms expecting to grow next year, two-thirds (67%) are currently flat or have declined slightly this year. Most of the sector's optimism is not riding on momentum that is already there. It is a bet on a turnaround.

We don't think that's a bad thing. Hoping for a better year after a difficult one is exactly what you'd want a resilient, forward-looking sector to do. But it does mean the honest question for most firms isn't "will we grow?", it's "what, specifically, is going to be different about next year?"

The sections that follow try to answer that with evidence rather than optimism alone: which pricing models are actually associated with growth, where the recruitment pressure is concentrated, and which technology and process choices tend to separate firms pulling ahead from firms holding steady.

Outlook for the next 12 months



Performance versus last year



67%

of firms expecting growth are currently flat or slightly down.

SECTION 06

Pricing: the quiet decision that predicts a lot

Fixed fee remains comfortably the dominant pricing model across the sector; 56% of respondents use it as their primary approach. Hybrid models sit at 22%, the billable hour at 18%, and value-based pricing, the newest and least-adopted approach, at just 4%.

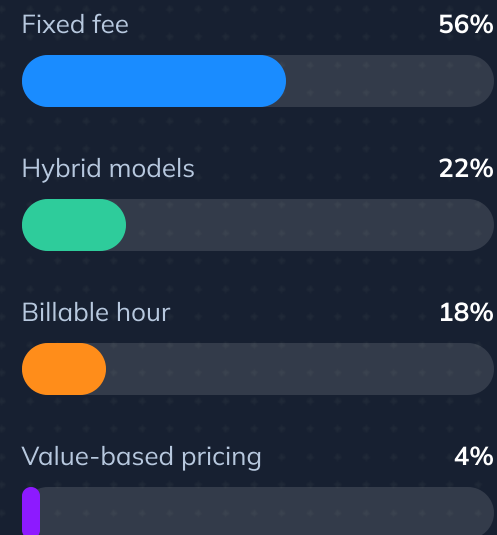
The percentage usage of pricing models isn't surprising but how differently each model performed against this year's results is worth consideration in the next partner meeting.

Not a single firm whose primary model is the billable hour reported improved performance this year. Every billable-hour firm in the sample either held steady or declined. To be clear, the billable hour isn't a bad way to run a firm, for plenty of work it is still the fairest, most transparent way to charge. But it has a ceiling built into it: you can only bill the hours in a day, multiplied by the people you have. If growth depends on volume alone, and headcount is already the sector's hardest constraint, there is very little room left to move in.

Hybrid pricing tells a different story. Firms using a hybrid approach improved significantly more than a third of the time (36%) and were the least likely of any group to have declined this year (9%, against 29% for fixed fee). The two respondents using value-based pricing both improved this year too - with a sample of two, a trend worth watching, not a conclusion yet.

Primary pricing model

Share of respondents



"There's an enormous difference between giving a fixed price and pricing for value. The firms getting it right define the scope carefully and understand the true cost of the work. The firms getting it wrong just multiply hours by a rate and call it a fixed fee."

Shaun Jardine · CEO, Big Yellow Penguin

What the pricing spread is telling us

Fixed fee, the sector's default, produced the widest spread of outcomes of any model. Firms improving significantly, firms declining, and everything in between. Fixed fee isn't a model that reliably produces one outcome; it rewards firms who have genuinely worked out their pricing, scoping and margins, and is far less forgiving of firms who haven't got round to it yet. If your firm runs on fixed fee, the more useful question probably isn't whether to change model. It's whether the one you have is actually dialled in, or inherited and left untouched.

None of this is an argument for abandoning time-based billing tomorrow. It is an argument for treating pricing as a genuine strategic lever - something worth revisiting deliberately, the same way a firm might revisit its practice mix or its office footprint - rather than a historical default nobody has looked at twice.



"More firms are moving towards hybrid pricing because they recognise that clients increasingly want greater certainty and more fixed prices. Firms prepared to experiment with pricing are also likely to be examining their workflows, profitability and use of technology more closely - the pricing model may therefore be an indicator of wider commercial discipline within the firm."

Shaun Jardine · CEO, Big Yellow Penguin

Jardine, Big Yellow Penguin

0%

of billable-hour firms reported improved performance this year.

36%

of hybrid-pricing firms improved significantly - the strongest of any model.

“

The risk of a seismic shock in the industry has risen significantly. Blaming a model as the cause is easier, as we have an understanding of the strengths and weaknesses of it. The real risk lies elsewhere.



John Cullen
Partner, Menzies

Revenue left on the table

One of the more actionable numbers in this research doesn't need a single new client, new hire, or new bit of technology to unlock. It is already sitting in your billing.

Across the firms surveyed, the average proportion of billing written off sits at just under 14%. Applied to a firm turning over £1m - the most common turnover band in the survey - that is as much as £150,000 left on the table every year, before it is ever billed, let alone chased.

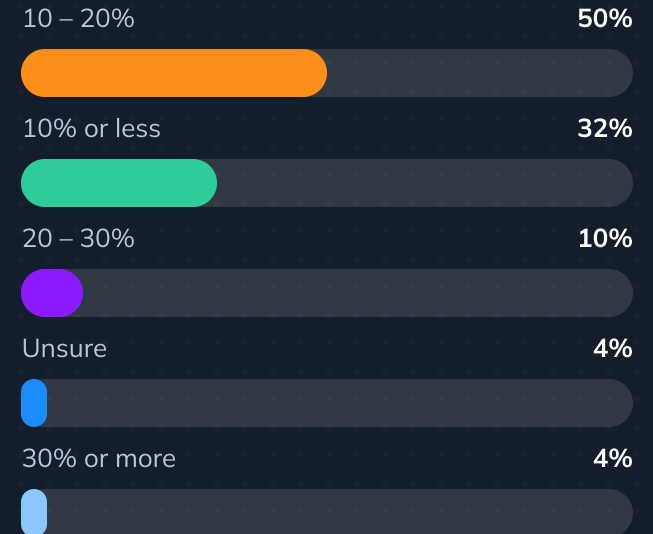
It is worth being careful with the expression "write-off", because it can sound like a stand-in for bad service, or for clients pushing back on a bill. In practice, write-offs

are much more often about process: time not captured promptly, scope creep quietly absorbed rather than billed, or a write-off applied out of habit rather than a real judgement call on a specific matter. That is the good kind of problem to have, because process is fixable in a way that "clients won't pay what we're worth" isn't.

The practical next step for most firms isn't an awkward conversation about raising prices. It is a much smaller one: an honest look at where time and billing data currently slips through the cracks, and whether the systems in place make it easy to capture and bill accurately, or quietly make write-offs the path of least resistance.

Proportion of annual billing written off

Share of respondents



£150,000

a year left on the table by a typical £1m-turnover firm, before billing.

The upsell opportunity firms can't see

More services, less visibility

A quarter of respondents don't know what proportion of their client base uses the firm for more than one service, and that gap concentrates heavily in mixed-practice firms (53% unsure) while specialist firms almost universally know the answer. The firms with the most service lines to cross-sell between have the least visibility into whether it is happening - a data problem and a strategy problem at once.



"Our turnover is between a million and a million and a half, and we probably don't write off more than £500. The key part is communication and managing client expectations right at the beginning — if you quote three to four grand and it comes in at 4,700, that's where it goes wrong. There's also a growing influx of complaints now, and the use of AI to complain, so people are reducing or writing off bills because of it."

Sarah Charlton · CEO, Eaton Evans & Morris Solicitors

SECTION 08

The thin pipeline: recruitment and succession

If there is one finding here every Welsh firm will relate to, it is that recruitment, retention and talent loss was named the single biggest threat to the sector.

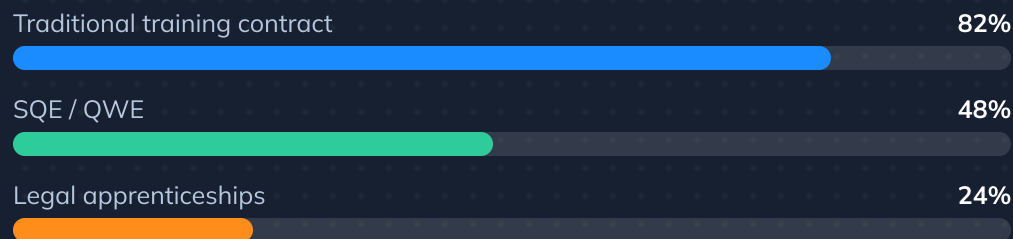
Every single respondent - 100% of law firm leaders - rated recruiting qualified solicitors at least moderately difficult. Nobody said it was easy: 44% called it moderately difficult, 38% somewhat difficult, and 18% very difficult. This isn't a problem hitting a struggling minority. It is the water everyone in the sector is currently swimming in.

The pressure isn't spread evenly across practice areas, though. Private client and family law practices are the two areas most likely to name recruitment as their biggest threat - and, separately, they are also the two areas most often named as the hardest roles to actually fill. If your firm does private client or family work, you are not imagining that this feels harder than it used to.

Given how hard recruitment already is, not every route into the profession is being used equally. 82% of firms rely on the traditional training contract, while apprenticeships - one of the newer, more flexible routes in - currently account for only 24%. Firms themselves

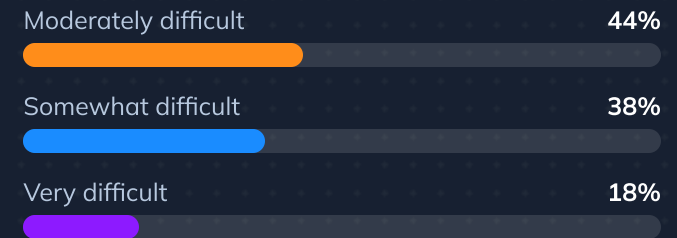
Routes for junior lawyers

Select all that apply



Difficulty recruiting qualified solicitors

Nobody said it was easy



"Traditionally, many Welsh law firms stick their head in the sand about succession. Associates are now so well paid that in some firms they're paid higher than their partners. So, there isn't a desire to take on all the regulation, the staffing problems, the health and safety. It's just not an attractive deal."

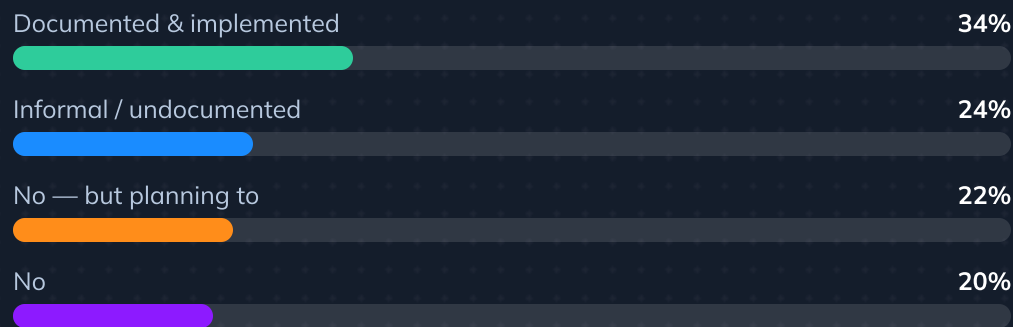
Sarah Charlton · CEO, Eaton-Evans & Morris Solicitors

Succession: the other half of the same gap

The recruitment pressure feeds straight into a second, related gap: succession. 42% of firms have no succession plan in place at all, and a third point to a lack of suitable internal candidates as the specific barrier holding that planning back. Put the two together and the picture is clear: a pipeline that is thin at both ends.

Interestingly, having more tools, being a bigger firm, or being further along on digital maturity made no difference at all to whether a firm has a succession plan in place - a shared, sector-wide issue rather than something size or tech spend currently solves on its own.

Formal succession plan in place



"There is undoubtedly a genuine shortage of experienced legal talent. But if 42% of firms have no succession plan, that suggests many organisations are being reactive rather than planning several years ahead... The strongest firms tend to treat succession planning as a talent-development exercise rather than an emergency recruitment exercise."

Ryan Pryce · Associate Director, TSR Legal

IN THEIR WORDS

Voices from the sector and our partners

Firm responses are reproduced verbatim and anonymised, as promised at the point of survey. Commentary from the report's partners is attributed.

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Firms from outside Wales moving in and obtaining large grants drives up salaries and causes massive issues with recruitment, even for larger traditional Welsh practices.

Survey respondent · on the biggest threat to the sector

PARTNER COMMENTARY

"The pace of change [in tech] is immense so hiring in a specialist, unless you know what you are looking for, is a risk. Associations / communities are growing and they are sharing best practice within their group."



John Cullen · Partner, Menzies

PARTNER COMMENTARY

"One of the biggest mistakes is assuming that a strong fee-earner will automatically become a strong leader. Those are related but different skill sets."



Ryan Pryce · TSR Legal

“

"Only 24% of respondents believe individuals and small businesses in their area clearly have adequate access to affordable legal advice. Among those with a view on legal aid, 95% say provision in their region is either increasingly difficult or not viable in the long term. That should concern us all."

Emma Waddington · Editor, Legal News Wales

The DIY tech sector that's doing better than it thinks

Welsh firms are, by and large, running their own technology rather than handing the thinking over to a specialist. 42% have no dedicated IT or tech role at all, and a further 24% run on a dual-role basis - typically a practice manager or operations lead carrying tech alongside their day job. Put together, two-thirds of the sector is making technology decisions without a specialist in the room.

You might expect that to show up as a sector falling behind. It mostly doesn't. The core technology stack is genuinely consistent across Welsh firms: over 94% have a document management system, a practice or case management system, and e-signatures in place. Online onboarding and time / billing software follow close behind, and 30% of firms have all five as a settled

baseline. Whatever else is true, this is a sector with real digital foundations already in place.

What is surprising is what happens once you look at confidence rather than capability. Among firms with a dedicated IT or tech role, 0% describe themselves as extremely confident adopting new technology. Among firms running a dual-role setup - the DIY group - 58% do.

On the surface, that feels contradictory. Firms with a dedicated tech role actually have the most tools in place of any group, and performed the best financially this year (47% improved, against 33% for dual-role firms and just 14% for firms with no dedicated role at all). They are also, by a wide margin, the most likely to be actively shopping for a new case management system in the next 12 months (41%, against 0% of dual-role firms).

Dedicated IT / tech role



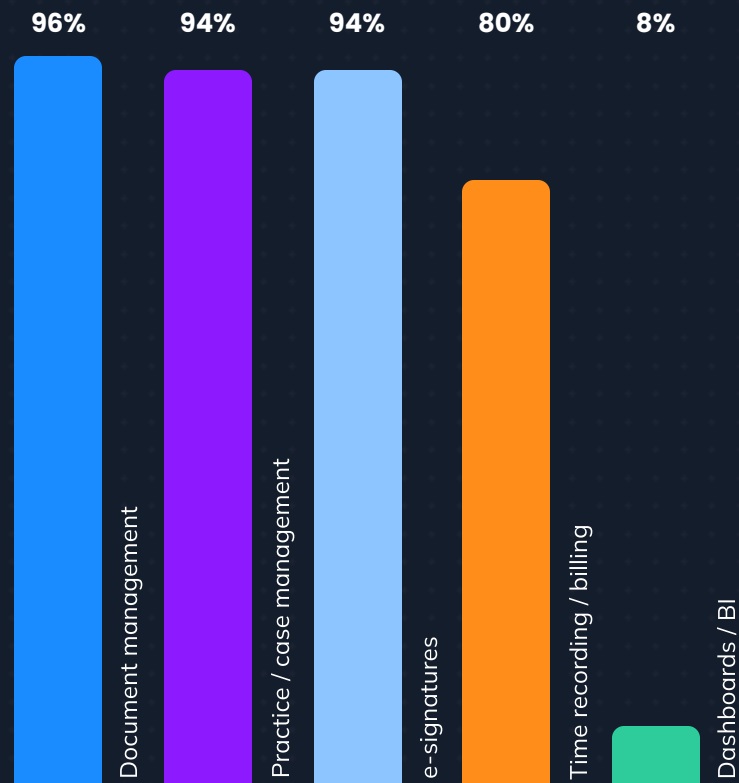
"There's also an element of 'keeping up with the Joneses', law firms of every size can be a bit like sheep with technology choices, and on the basis, if everyone else has made the same one, it's probably safe."

Jeff Wright · Chief Experience Officer, Redkite Solicitors

Missing tool, or missing habit?

Core tools in place

Select all that apply



So this isn't really a confidence problem. It is a firm that knows enough to be dissatisfied. They're investing enough to employ someone whose job is to understand the technology also means being the firm best placed to see your current setup's limits clearly.

The DIY group's higher confidence looks less like superior capability, and more like not yet having reached the point of knowing what they don't know - and there is a real cost hiding in that. If nobody has ever properly put your tech

stack under the spotlight, you are missing the opportunities sitting just beyond its limits too.

None of this means DIY is the wrong approach. The sector's consistent core stack proves it can work perfectly well for two-thirds of the market. It just means self-reported confidence isn't, on this evidence, a reliable guide to whether your current setup is actually serving you.

59%

of firms who call billing inefficient already own dedicated billing software.



"Most modest-sized law firms with technology expertise in place will only have one to five people, and that expertise tends to be specialist rather than general. Usually deep in technical areas, not in skills like change management and adoption. Those are a science in themselves, and IT teams rarely come with them, even at the bigger firms."

Jeff Wright · Chief Experience Officer, Redkite Solicitors

Where the real gaps are

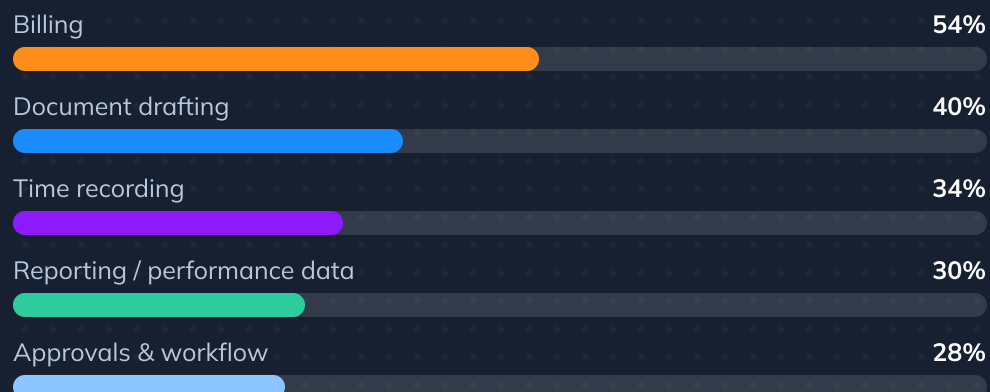
Not every process pain point is a technology gap. The research highlights two genuine gaps in what is on offer: gathering and viewing firm performance data, and approvals and workflow automation. Most firms who named these as their most inefficient processes aren't struggling with a tool that underperforms - they simply haven't adopted one yet. Only 8% of firms currently have any kind of dashboarding or BI tool in place, by far the least-adopted category in the whole stack.

Billing is the most commonly flagged inefficient process across all firms (54%), ahead of document drafting and time recording. You would assume that calls for new software, but 59% of firms who named billing as inefficient already have dedicated billing software in place. The same goes for time recording and document drafting, where 70–95% of firms who flag them already own the relevant tool. Owning a tool and running it well are

two different things, and most firms have only really solved for the first. The fix is closer and cheaper than a new system - a proper look at how billing is actually configured and used day to day.

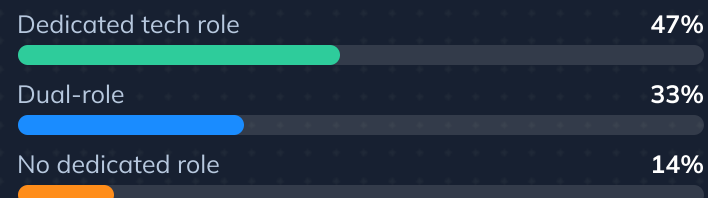
Most inefficient processes

Select up to three



Financial performance improved

By technology resourcing



SECTION 10

AI: interested, not rushing in

Artificial intelligence sits in an interesting spot in this research. It is genuinely on the sector's mind, but approached with real care rather than either excitement or avoidance.

Accuracy and reliability is, by a clear margin, the biggest concern firms raise about AI (46%). That concern doesn't look the same for every firm, though. Firms with a dedicated tech role worry most about confidentiality (47%) and staff misuse (41%) - the deeper, more technical risks that only come into view once you understand what can go wrong after a tool is switched on.

Firms without a specialist in the room worry more about which tools to invest in and training or skills gaps (42% each among dual-role firms) - the earlier "where do we even start" questions that come before deployment is on the table. Neither group is wrong; they are simply at different points on the same journey.

Asked what kind of support would actually help with AI decisions, webinars and case studies came out as the two most requested formats sector-wide, with peer-to-peer events close behind. If you are further along, generic content probably won't move you forward as much as a direct conversation about your specific setup would; if you are earlier on, the general formats are exactly the right place to start.

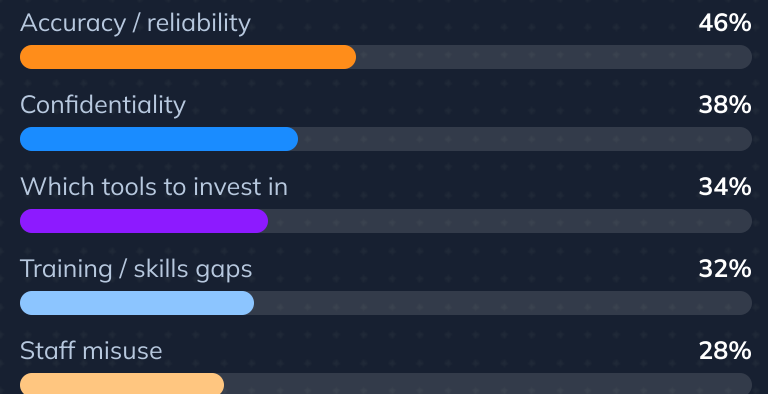
When asked what the biggest opportunity is for the legal sector in Wales over the next decade, the most frequent answer was technology and AI adoption.

Fund independent testing and guidance on approved AI tools for legal practice.

Survey respondent · on the single change that would most improve the sector

Biggest concerns about AI

Select up to two



Support that would help most



SECTION 11

Legal aid: carrying the weight quietly

Legal aid firms performed no differently to the rest of the sector this year. 33% reported improved financial performance, right in line with the wider market.

Where they genuinely differ is in outlook. Firms doing legal aid work are roughly three times less likely to expect growth next year than firms with no legal aid work (17% against 56%), and considerably more likely to expect their organisation to contract.

This isn't just a legal aid firm's own worry, it shows up independently across the wider survey. Asked where local legal provision is declining, "legal aid and publicly funded work" was named more often than any other single area, tied only with work moving to larger providers outside the region. And when we asked the whole sector how sustainable legal aid

work is in their region, the answer was almost unanimous: 74% called it increasingly difficult, and a further 21% said it isn't viable long term. Only one firm in the entire survey called it sustainable.

It is tempting to put the growth outlook down to resourcing, that legal aid firms are simply less equipped to grow, but the data says otherwise. They have essentially the same average technology stack and the same digital maturity as everyone else in the survey. This isn't about capability. It is about confidence in the funding environment these firms operate in.

And this isn't a worry legal aid firms carry alone. Asked whether individuals and small businesses in their area have adequate access to affordable legal advice, only 24% of the whole sector said a clear yes.

Sustainability of legal aid work

Firms for whom it applies



17% v 56%

expect growth next year. Legal aid firms against firms with no legal aid work.

Adequate access to affordable advice



Is the model built for what's coming?

Almost half of respondents (48%) either do not believe, or aren't sure, that their firm's current business model is sustainable over the next 10 years.

You would reasonably expect scepticism about the traditional partnership model to sit mainly with firms who have already moved away from it - alternative structures, looking back at what they left behind. That is not what the data shows. Doubt about whether the partnership model will still dominate in ten years is shared just as strongly by firms currently structured as a traditional partnership as it is by everyone else. The people still living inside the model are just as unsure about its future as the people who have already stepped outside it.

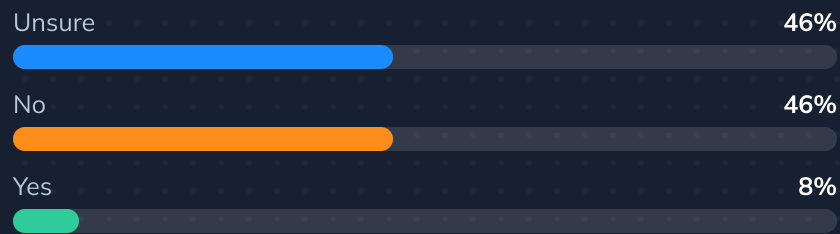
We asked firms whether they had recently had a formal valuation, and whether they are considering private equity investment, acquisition, merger or expansion activity in the next five years. Firms without a recent formal valuation are more likely to be considering a merger (52% against 30%) and they are also more confident their business model is sustainable over the next ten years (62% against 43%).

This means the most useful question for a firm to ask itself isn't whether the model will hold. It is what a partner exit, an ownership change, or a merger conversation would actually look like if it happened in the next few years - and whether a recent valuation is already part of that picture, or something worth putting in place alongside it.

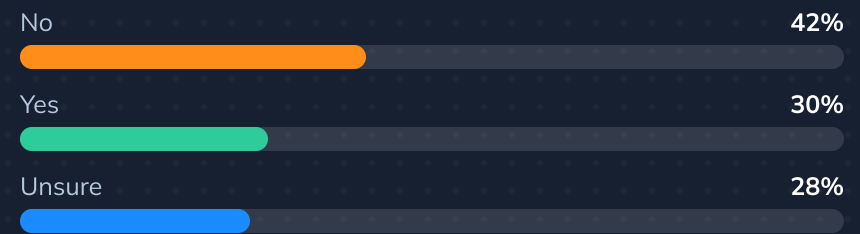
48%

do not believe, or aren't sure, their model is sustainable for ten years.

Will the partnership model still dominate in 10 years?



Formal valuation in the past three years



Where Wales can lead

“

Making Wales a testbed for responsible legal technology and AI adoption.

Survey respondent

“

To develop subscription legal services and products for SMEs that need ongoing, affordable support.

Survey respondent

“

Improving links between the professions and schools so legal careers are visible to a broader range of young people.

Survey respondent

This research surfaced three ways Wales has the biggest opportunity to lead: how legal technology gets tested and trusted, how legal services get priced and packaged, and how the pipeline of people starting a legal career gets grown.

The single most-cited opportunity for the sector, named by 27% of respondents, was technology and AI adoption, comfortably ahead of any other answer. Almost every other technology answer across the survey is about adoption -using more of what already exists. The first response above is about positioning Wales as a place that helps build and prove out what is next in legal technology, rather than a market that waits to receive it once it has been proven somewhere else.

Given how much of this report shows a sector that is genuinely capable - a consistent core tech stack, firms with dedicated tech roles outperforming their peers, and a considered set of concerns about AI rather than blanket resistance - that positioning isn't far-fetched. A smaller market can move faster and coordinate more easily than a much larger one.

The second points at a more immediate version of opportunity: new ways of packaging legal services themselves. Set alongside the pricing findings earlier in this report, it fits a wider pattern - the firms and ideas performing best here aren't sticking rigidly to how they have always priced and packaged their work.

The third reframes the recruitment challenge as an opportunity. Every other training-related answer in this research is about qualification routes for people already committed to a legal career. But are enough people even seeing law as an option in the first place? Given how tight the pipeline already looks, that might be the cheapest and longest-term lever of all.

Welsh law firms are ready for what comes next

None of the findings in this report describe a sector that is struggling to keep up. They describe a sector that is realistic about shared, genuinely difficult conditions - recruitment chief among them - while quietly building real capability underneath: a consistent technology foundation, a considered rather than anxious approach to AI, and original ideas about where Wales could lead rather than follow.

The point of this research is to give Welsh firms a way to see themselves against that picture, not against London or a generic UK-wide average. Wherever your firm sits against the figures here, the more useful question probably isn't whether you match the average. It is which one or two findings are worth raising at your next partners' or management meeting, and what you would want to be able to say differently the next time this research runs.

Osprey Approach and Legal News Wales intend for this to be the first of an ongoing conversation, not a one-off snapshot. If this research raised a question about your own firm that the data here doesn't answer, that is exactly the kind of thing we would like to hear about.

100%

of firm leaders find recruiting qualified solicitors at least moderately difficult.

30%

of firms share the same five-tool baseline stack.

27%

named technology and AI adoption as the sector's biggest opportunity.

Thank you to every firm that took part



✉ enquiries@ospreyapproach.com

☎ 03300 604 940

🌐 www.ospreyapproach.com



✉ editor@legalnewswales.com

🌐 www.legalnewswales.com

