

Generative AI in Legal 2024



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Executive Summary

This presentation contains data from a study on generative artificial intelligence in the legal profession. The study, which IDC conducted and Relativity commissioned, surveyed 300 respondents in North America, Europe, and Australia/New Zealand in July and October 2024. The study respondents were legal professionals working at law firms, corporations, and government agencies.

The study explains how legal professionals, including lawyers, paralegals, legal operations professionals, and legal IT professionals, incorporate generative artificial intelligence into their daily activities.



Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

Key Findings

- ▶ **AI use in the legal profession is growing substantially**, with 50% of respondents reporting that their AI use has increased. Across the board, AI usage has increased by an average of 43%, with paralegals using AI more than lawyers. AI is here, and organizations will need to adapt to survive.
- ▶ **The largest organizations are seeing the biggest increase in GenAI usage.** GenAI use increased by almost 50% in organizations with over 1,000 employees.
- ▶ IT (18%) and legal (18%) have the biggest influence on **purchasing AI in the general technology buying process**, while legal (21%) and compliance (19%) have the biggest influence on the **AI governance process**.
- ▶ APAC respondents had a significantly higher interest than their European and North American counterparts in **GenAI's impact on data privacy and information governance**, while European and North American respondents were more interested in **AI's ability to automate low-level tasks**. Law firms using billable hours are more likely to already be using GenAI, with 59% of **billable-hour respondents** reporting that they use GenAI versus 42% of **task-based billing respondents**.
- ▶ Law firms using billable hours are most interested in **automating low-level tasks** (57%) and **lowering costs** (48%), perhaps to reduce non-billable tasks and increase revenue.

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

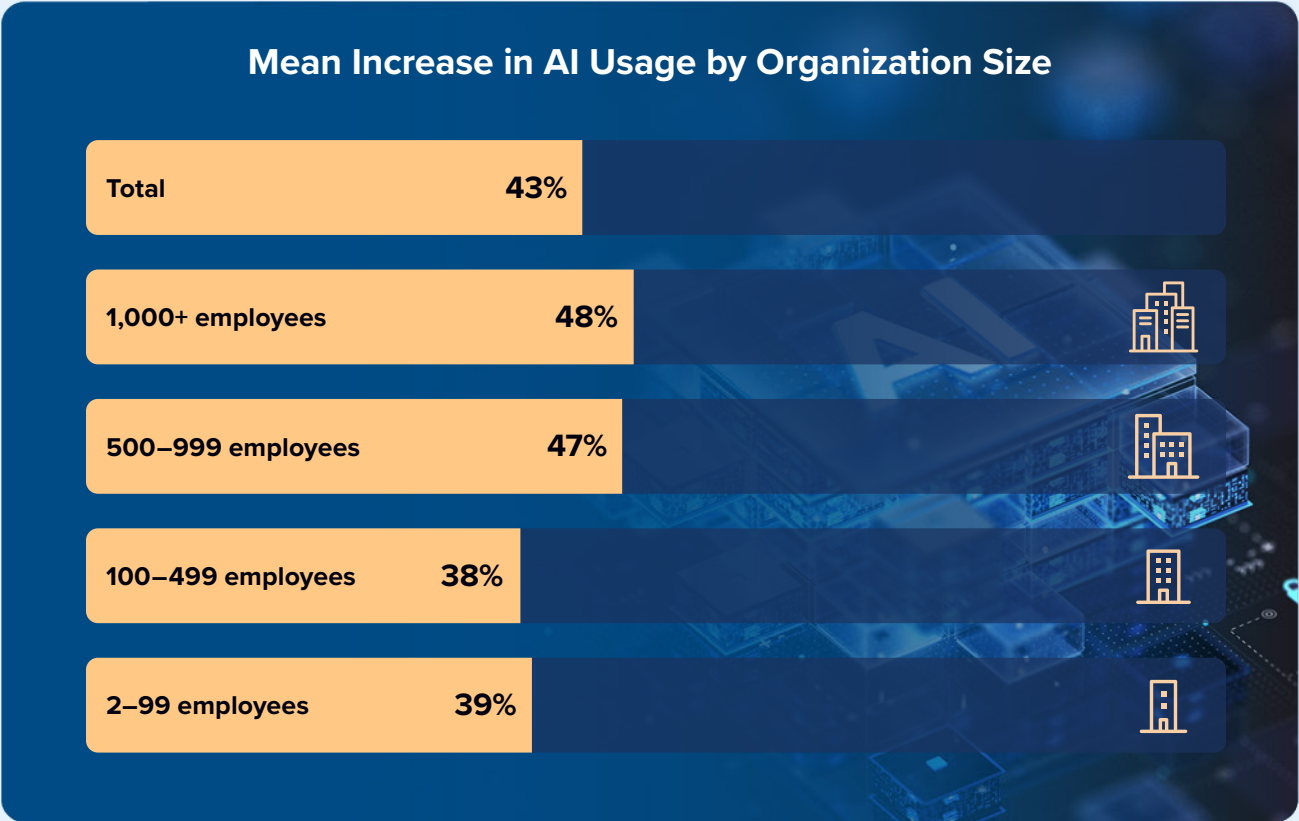
Key Findings (continued)

- ▶ Government respondents (51%) were the biggest users of **software vendors' AI tools**, followed by corporate (40%) and law firms (38%). Law firm respondents were the biggest users of service providers (50%), while corporate (50%) had the highest percentage use of **in-house proprietary models**. **Public model-based tools** were the least popular with legal professionals, with 26% of government respondents, 23% of law firms, and 21% of corporate using these.
- ▶ Although contract analysis and legal research have been the pioneer areas in legal professionals' generative AI (GenAI) use, IDC projects **document review to be the leading task for GenAI use within the year**, with 65% of respondents planning to use GenAI within one year and 93% planning to use it within five years. Document review is also the task legal professionals trust AI with the most, with 89% being "very comfortable" or "somewhat comfortable" using it.
- ▶ A high percentage (73%) of organizations are taking specific steps to **develop technical proficiencies with GenAI**, with 67% providing **on-the-job training** to help employees develop technical skills. **Consultants/external service providers** are the second most popular method for developing skills.
- ▶ Respondents noted that **AI governance and clear AI principles** from vendors were must-haves for GenAI. **Security posture** was surprisingly low on their list of must-haves.

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

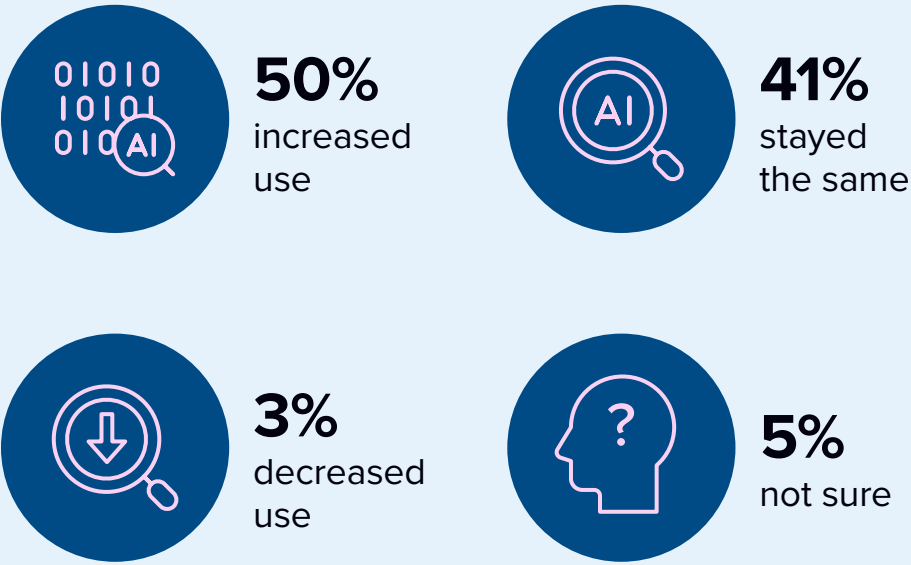
Is Legal Adopting AI? The AI Revolution Is Here

Legal teams’ use of artificial intelligence is increasing substantially, with 50% of respondents indicating that their AI use has increased by an average of 43% over the past two years. AI usage across organizations, regardless of their size, is exploding. Now is the time to embrace AI. For legal-specific tasks, AI use has risen by 43% in the past two years.



Compared with two years ago, how has the use of AI (generally or generative) changed, specifically in your legal work?

(Percentage of respondents)



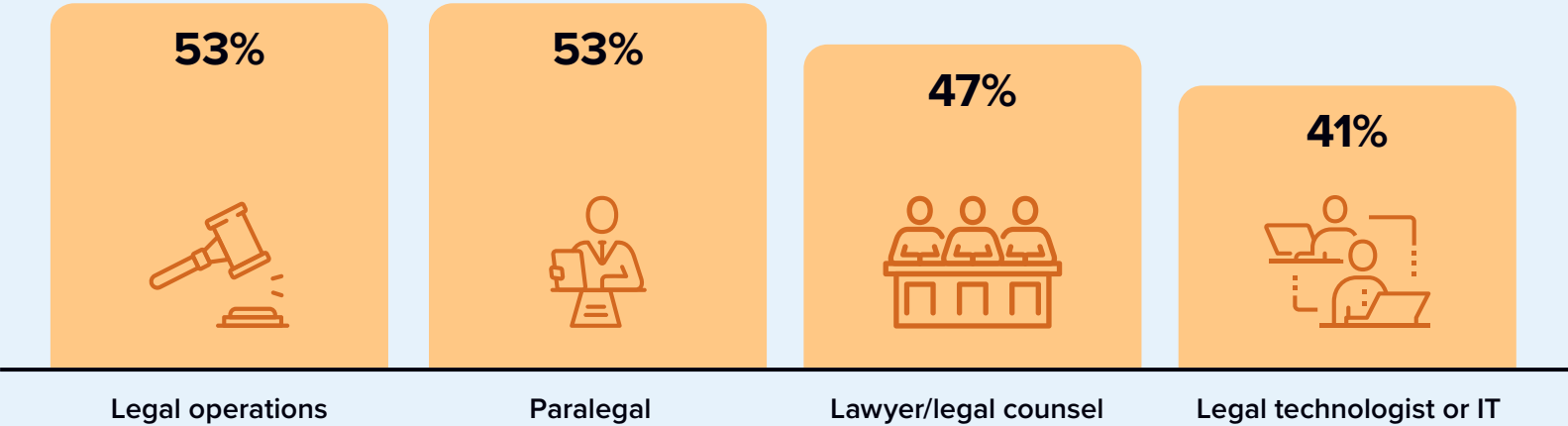
n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

Generative AI Trends

Already, generative AI accounts for 48% of all AI use, which is a significant percentage for an experimental and relatively new technology. **Paralegals and legal operations professionals are embracing GenAI at a higher rate than their lawyer and IT counterparts.** In addition, 69% of organizations indicated that legal teams’ use of GenAI for legal tasks will increase in the next two years.

The data also reveals that **law firms currently use GenAI significantly more than corporate and government legal teams**, although the latter two’s GenAI use is expected to increase in the next year.

Mean Percentage of AI Use by Role



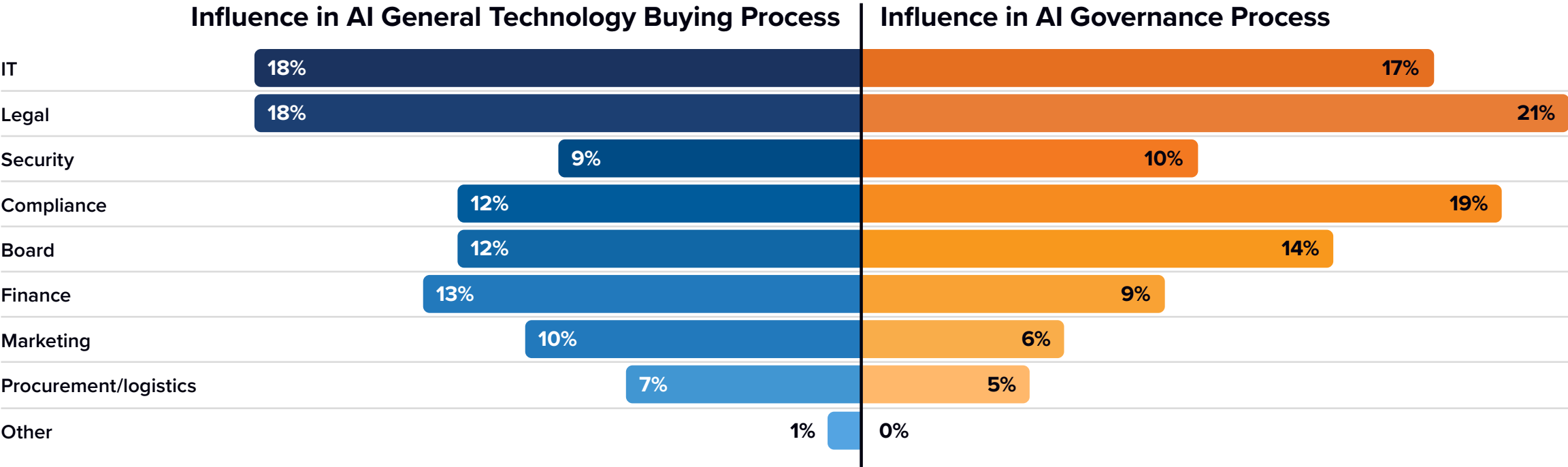
	Total	Industry of Law Practitioner			
		Corporate	Law firm	Government	
Currently using	44%	41%	51%	39%	
Not using but plan to use in the next 12 months	56%	59%	50%	61%	

n = 300; Source: IDC's Generative AI in Legal 2024 Survey, July and October 2024

Generative AI Adoption: Who Controls the Budget and Governance?

No clear leader is controlling AI technology purchasing or governance. Legal departments have a slight lead, and driving innovation in this space could be the key to higher budgets.

To the best of your knowledge, please estimate the percentage of influence each department has/will have on the general technology buying process for AI and the AI governance process in your organization.



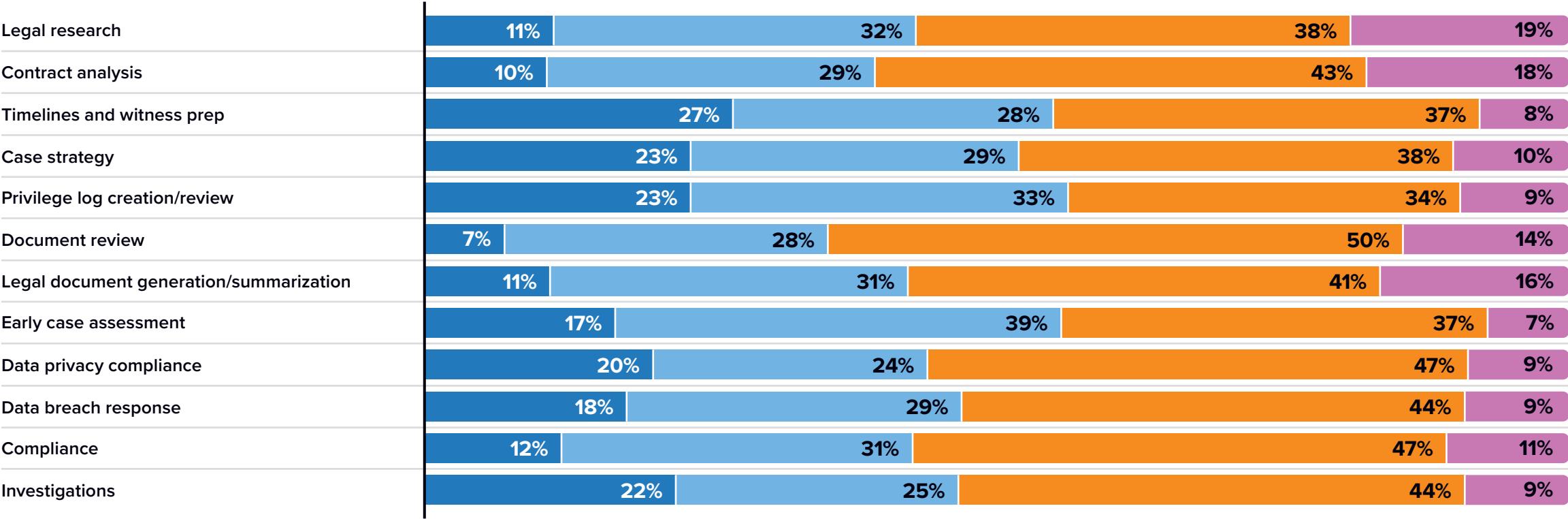
n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

AI Adoption: Specific Legal Use Case Trends

Respondents report that 48% of their AI use is generative AI and that its use in specific legal tasks will increase in the next few years. Contract analysis and legal research have the highest current GenAI usage, but IDC expects document review to be the leading task within a year.

What is the status of using generative AI for each of the following legal use cases in your organization?

■ Don't expect to use ■ Expect to use within 5 years ■ Expect to use within 1 year ■ Currently use



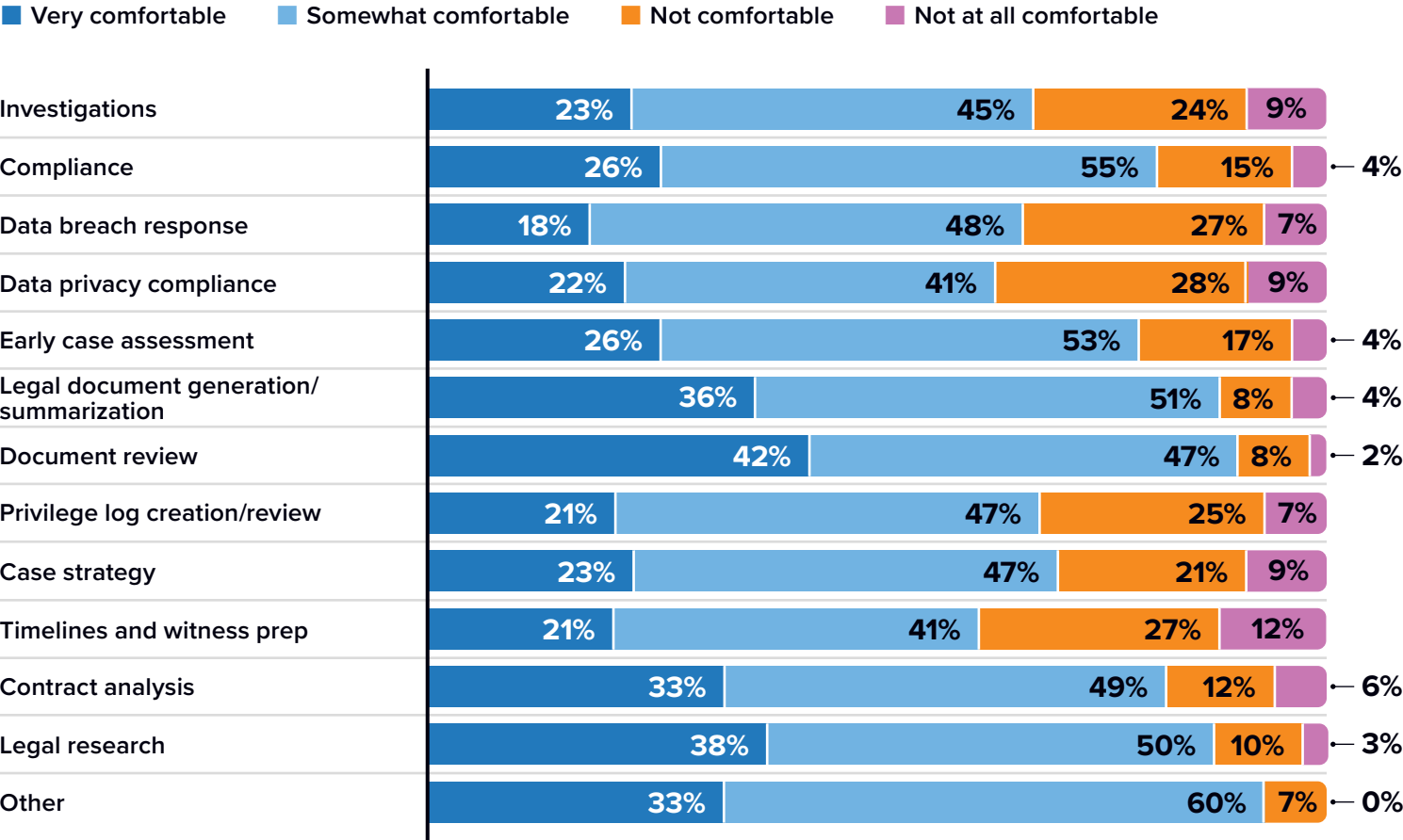
n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

Organizational Trust in GenAI

- Organizations trust generative AI with document review the most, with 89% of respondents indicating that they are “very comfortable” or “somewhat comfortable” using generative AI for document review, which is likely due to the long history of technology-assisted review in eDiscovery.
- By contrast, organizations are least confident about using AI in investigations, witness preparation, and privacy compliance. Government respondents are most wary of using generative AI in investigations. The study seems to indicate that organizations seek to train AI on the data following document collection and processing and not before, which is likely due to privacy and consent concerns.

How comfortable are you with your team and/or outside counsel using generative AI for the following?

(Percentage of respondents)



n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

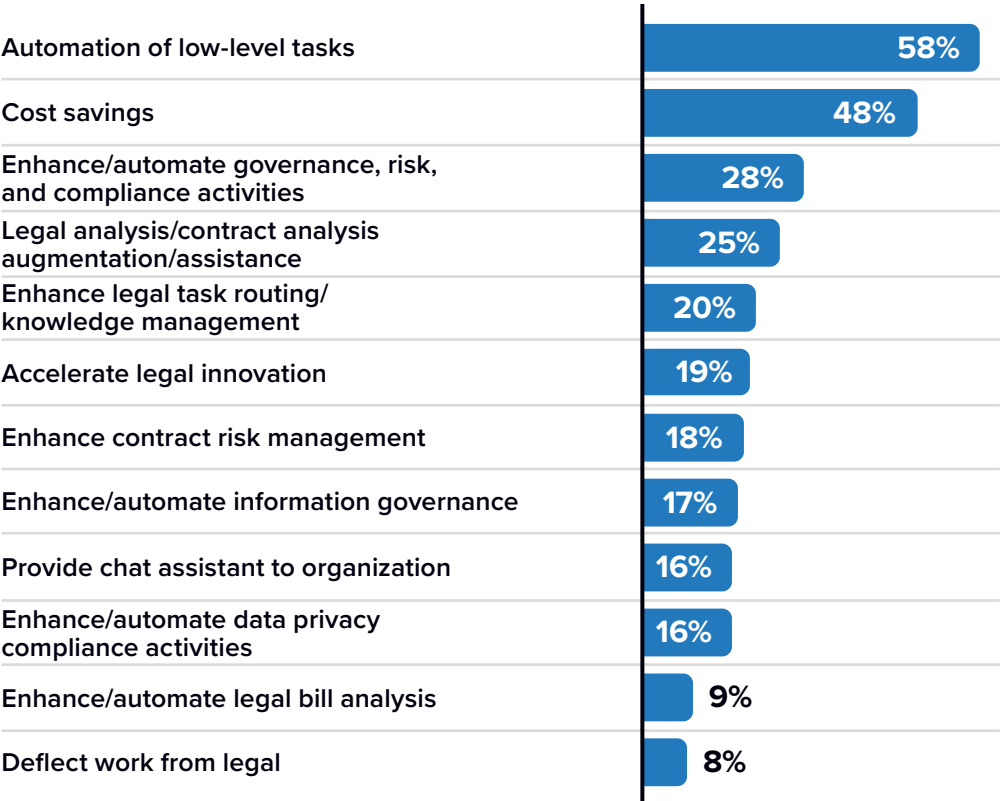
Why Legal Teams Use Generative AI: Expected Outcomes

Automating low-level tasks is the top reason respondents use generative AI by a wide margin, **followed by cost savings.**

The smaller the company, the more keen it is to automate low-level tasks to level the playing field. **Law firms with billable hours are equally keen** to automate low-level tasks and save costs, perhaps to reduce non-billable tasks and increase revenue. Interestingly, law firms using task-based billing do not leverage GenAI as much as their billable-hour counterparts. Logically, they should be striving to improve the efficiency of task-based billing.

What are the most desired outcomes when deploying generative AI in order of importance?

(Percentage of respondents worldwide)



Current mean use of GenAI by law firm billing model



59%

Billable hours



42%

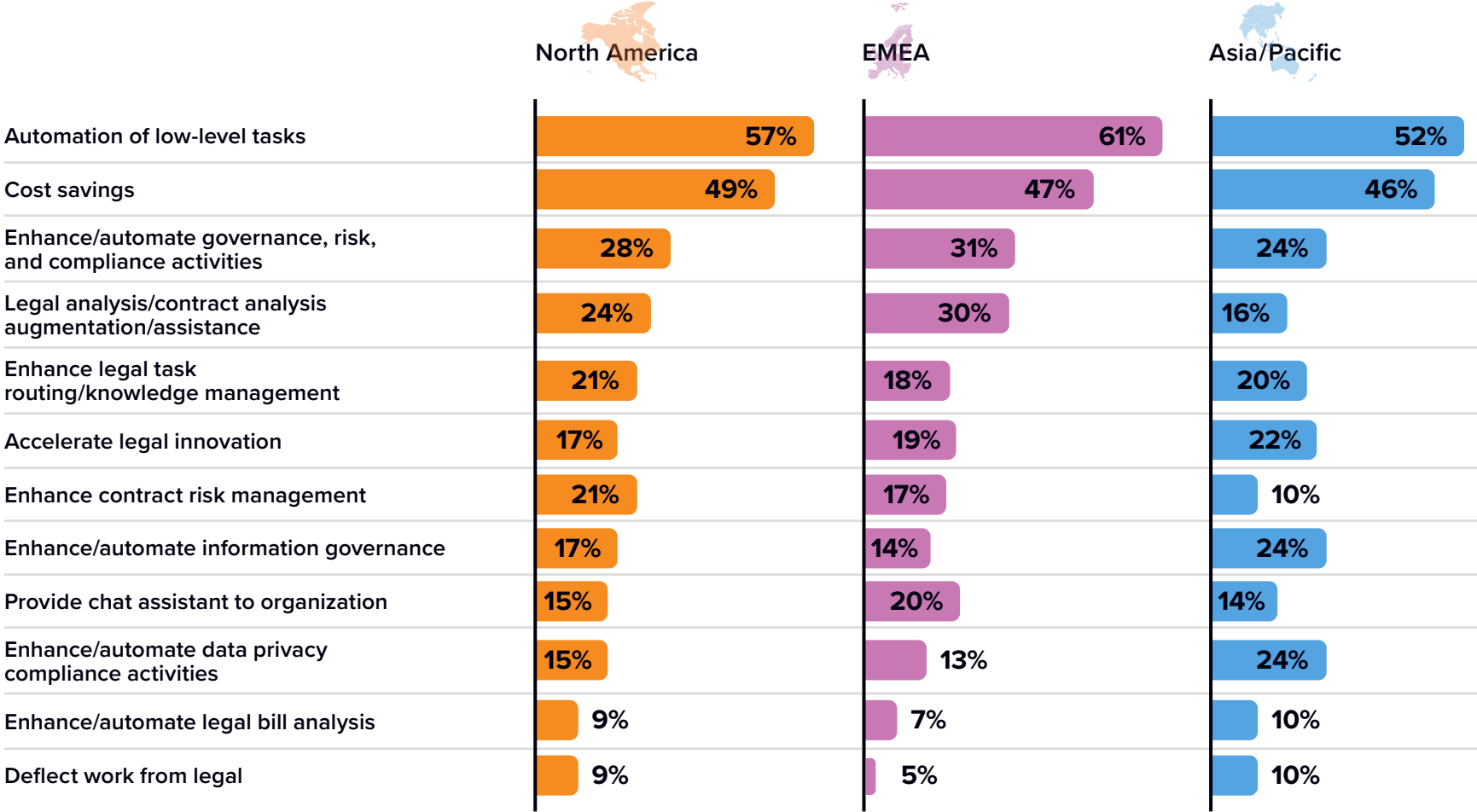
Task-based billing

Why Legal Teams Use Generative AI: Regional Differences

Automating low-level tasks is the top reason for using generative AI **across all regions**.

APAC respondents have a substantially higher interest than their European and North American counterparts in GenAI’s impact on **data privacy and information governance**.

European and North American respondents are more keen on AI’s ability to automate low-level tasks.



n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

Why Legal Teams Use Generative AI: Organizational Differences



Cost savings



Legal innovation acceleration



Automation of low-level tasks

Organization Size: Employees				
	2–99	51%	16%	60%
	100–499	43%	16%	59%
	500–999	51%	20%	54%
	1,000+	49%	24%	57%
Organization Size: Revenue				
	Below \$250M	49%	19%	61%
	\$250M–\$1B	50%	23%	57%
	\$1B+	49%	26%	54%

The **smaller the organization**, the more interested it is in **automating low-level tasks**; many see this as a way of leveling the playing field. By contrast, **larger organizations** have a greater interest in **AI’s ability to accelerate legal innovation**.

Law firms with billable hours are most interested in **automating low-level tasks (57%) and saving costs (48%)**, perhaps to eliminate non-billable tasks and increase revenue.

n = 300; Source: IDC’s *Generative AI in Legal 2024 Survey*, July and October 2024

Continue reading ►

Why Legal Teams Use Generative AI: Organizational Differences (continued)

Corporate

Corporate respondents reported **cost savings** as the most desired outcome of using generative AI:



52%
Corporate



46%
Law firms



45%
Government

Corporate respondents were also the **most confident in using generative AI** for data breach response:



23%
Corporate



17%
Government



13%
Law firms

Government

As with other respondent segments, the most desired outcome is the automation of low-level tasks, although government respondents also rated enhancing/automating governance/risk compliance and privacy compliance activities higher than other respondent segments, likely due to FOIA and privacy obligations.

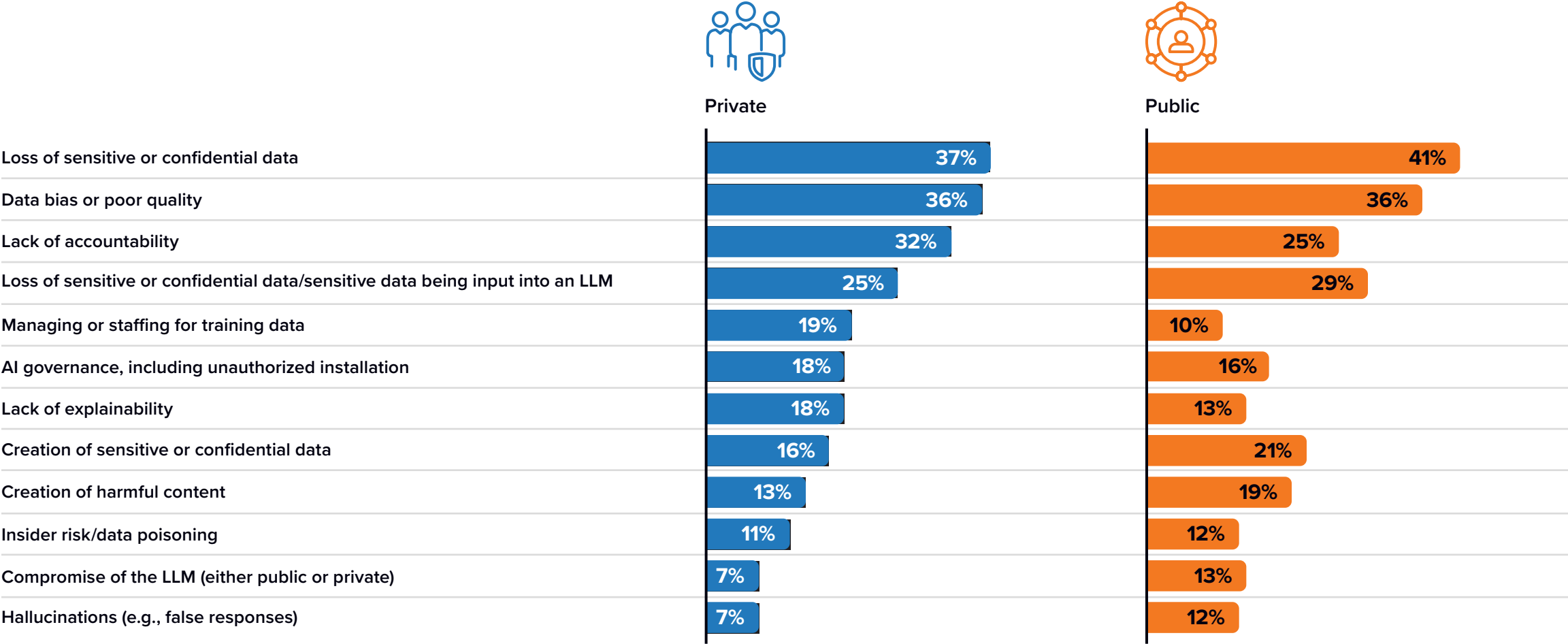
Government segment's top desired outcomes:

- 1** **57%**
Automation of low-level tasks
- 2** **45%**
Cost savings
- 3** **39%**
Enhancement/automation of governance/risk/compliance
- 4** **20%**
Enhancement/automation of data privacy compliance activities

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

Concerns with Public and Private GenAI Offerings

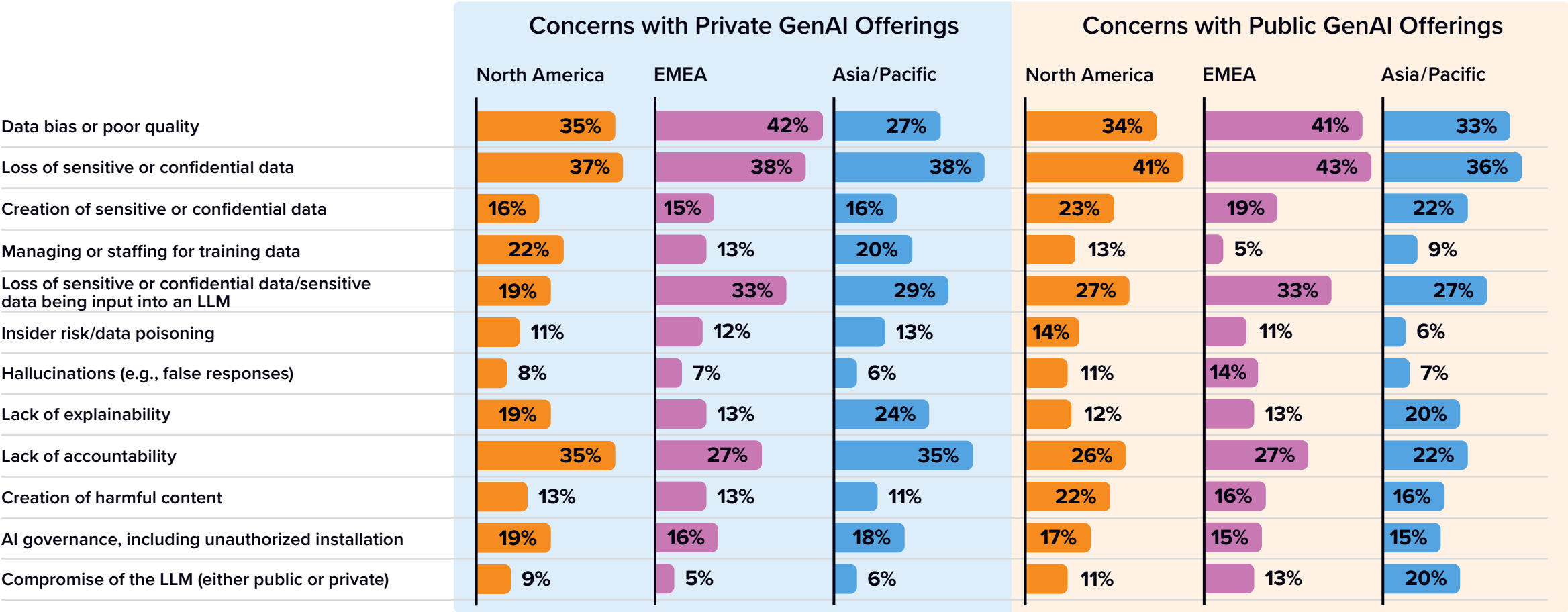
What are your biggest concerns when it comes to using commercially available public and proprietary private generative AI offerings?



n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

Concerns: Regional Comparisons

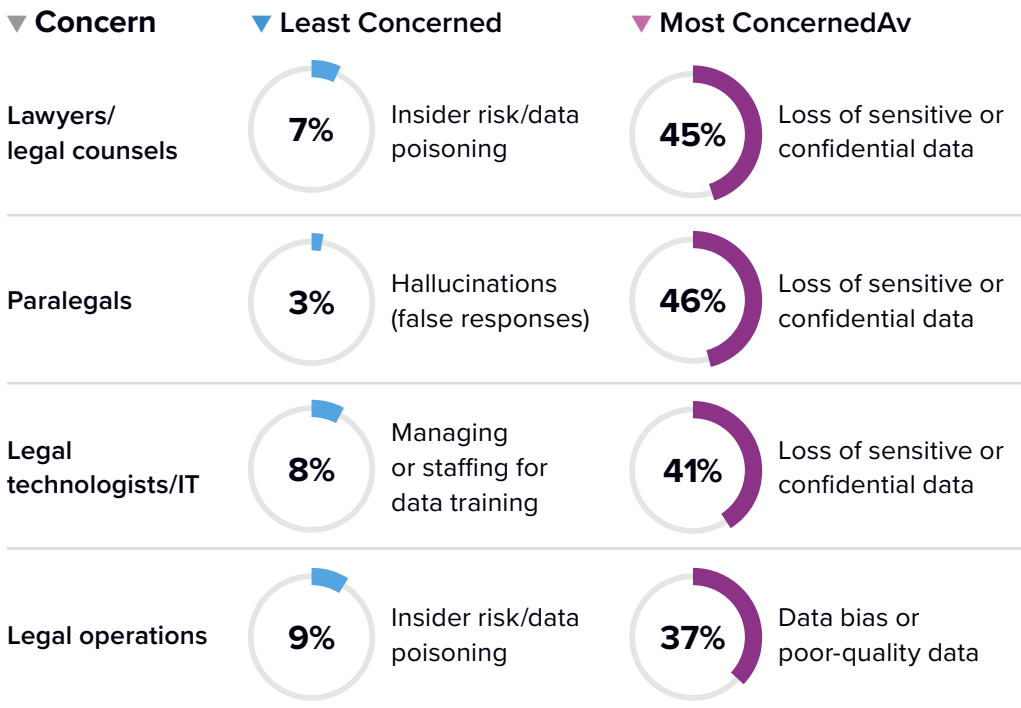
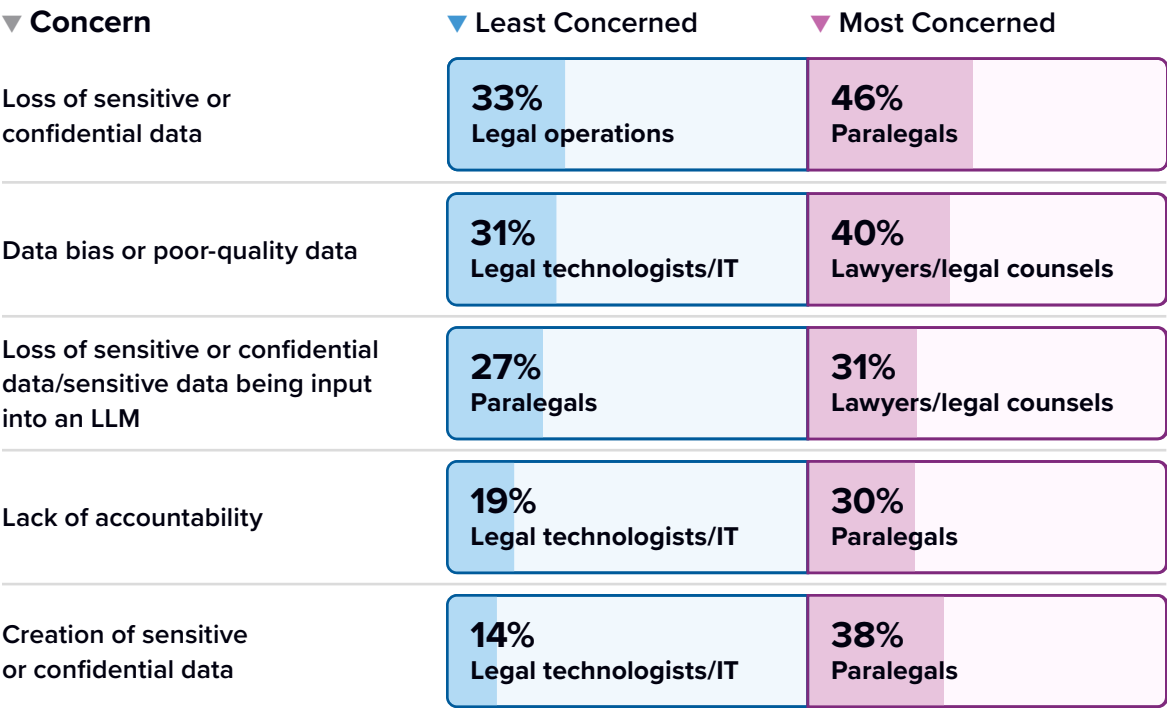
Europe and the UK are often at the forefront of regulations and have passed significant regulatory measures governing the loss of data and bias. Respondents from these regions care more about these issues across public and private models than any other segment.



n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

AI Concerns: Job Roles Causing Specific Sensitivities

An educational gap appears to exist when it comes to GenAI-associated risks. The level of concern about risks correlates heavily with the job role. IT professionals are more concerned about large language model (LLM) compromise and security, while end users are more focused on outcomes. Safeguarding AI deployments will require a team of stakeholders and trusted vendors.

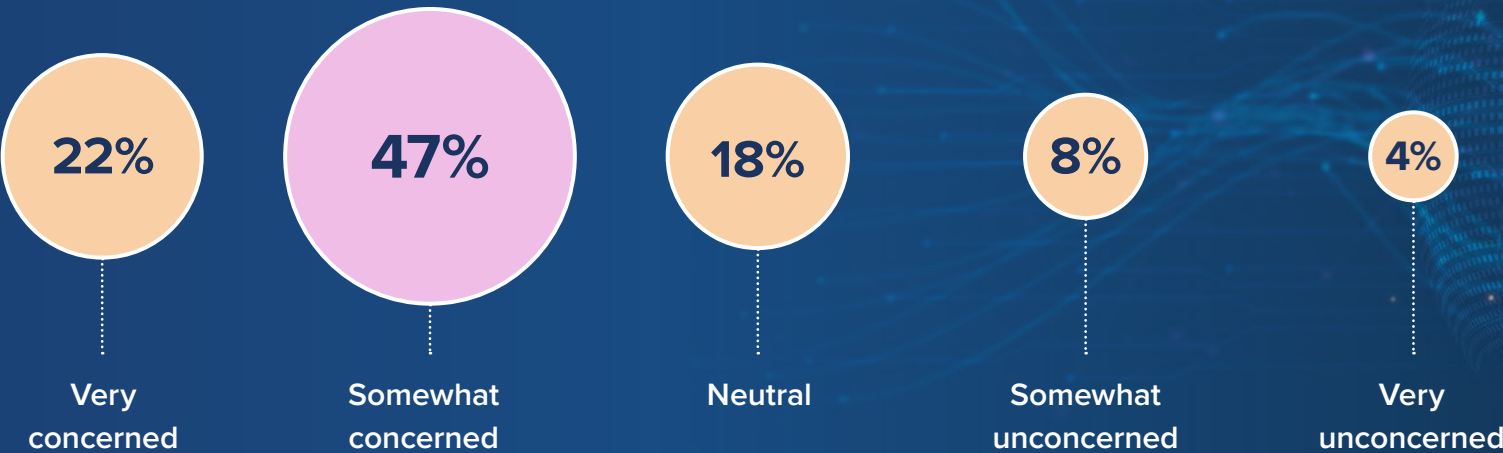


n = 300; Source: IDC's Generative AI in Legal 2024 Survey, July and October 2024

Generative AI Challenges: Speed of Innovation

Although generative AI will offer a new way of working, there are many difficulties to overcome initially. The speed of innovation will be a challenge. In just a little over two years, many new versions of LLMs have already become available, and legal is concerned about its ability to keep pace.

How concerned is your organization about addressing new issues around the recent wave/release of generative AI?



n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

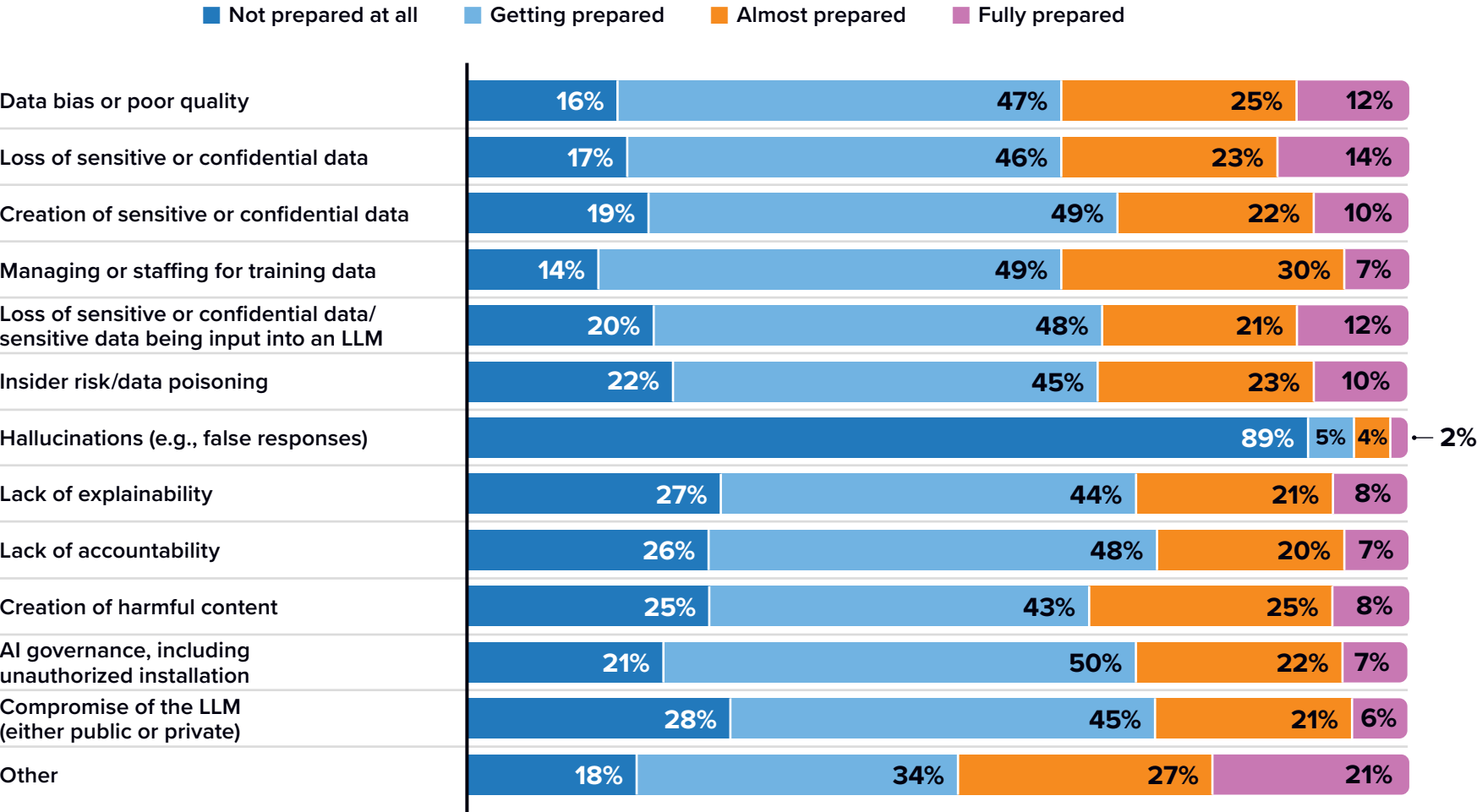
Generative AI: Overall Challenges

Generative AI and technology are moving ahead faster than ever, with 69% of respondents reporting they are concerned or very concerned about **keeping pace with innovation**.

That percentage jumps to 77% for **law firm** respondents and 81% for the **largest corporations** (with over 1,000 employees).

By contrast, the **smallest businesses**, which do not operate at scale, are not as worried about keeping pace with innovation.

How prepared are legal professionals to handle the following issues when using generative AI?
(Percentage of respondents)

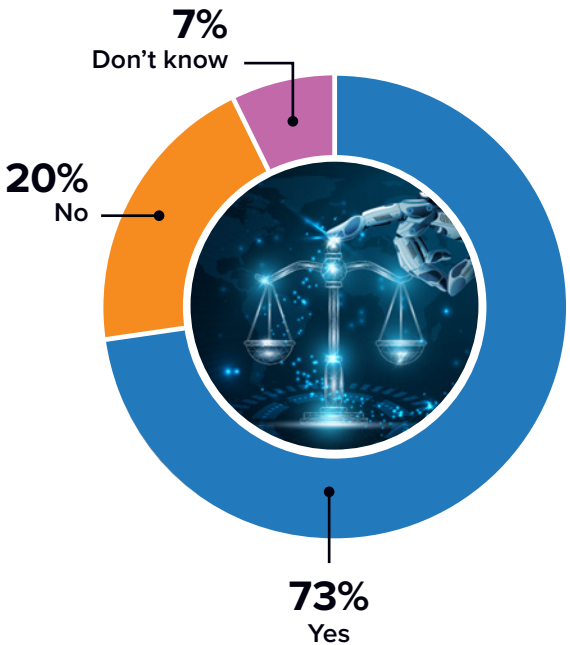


n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

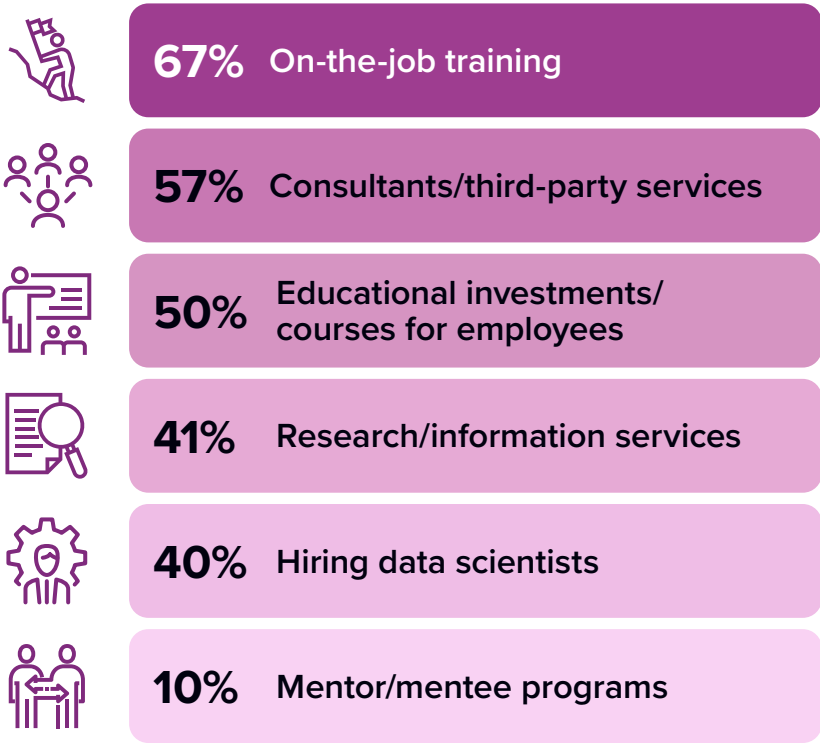
Organizations Developing and Investing in Technical Proficiency Will Win in the Generative AI Space

- Seventy-three percent of organizations are taking specific steps to develop technical proficiencies with GenAI, with 67% providing on-the-job training to help employees develop technical skills. Consultants/external service providers are the second most popular method for developing skills.
- Because GenAI is a new and powerful technology, users need to fully understand it to leverage it safely.

Is your organization taking specific steps to develop technical proficiency relating to generative AI?
(Percentage of respondents)



Which of the following steps is your organization taking to develop technical proficiencies relating to generative AI?
(Percentage of respondents)



n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

Key Implementation Challenges

Lack of maturity/technical competency was the top challenge in generative AI implementation with APAC reporting the highest percentage (76%) indicating that this challenge is the biggest barrier to deployment.

Which of the following are key challenges to implementing generative AI for legal tasks in your organization?
(Percentage of respondents)



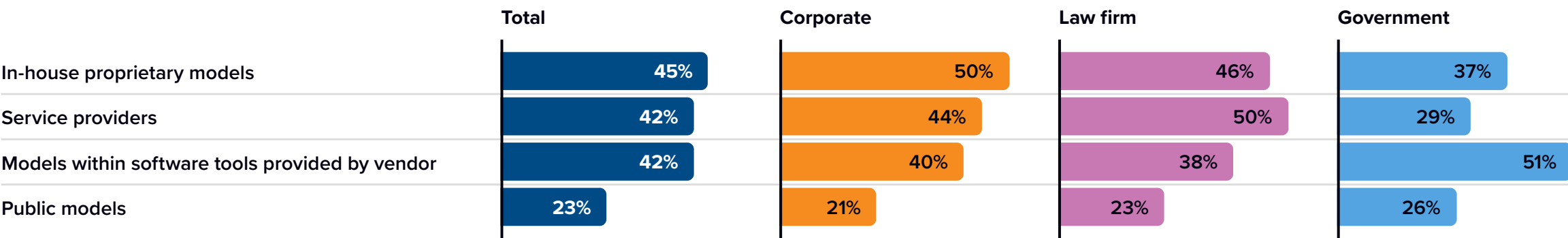
n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

Who Supplies Generative AI Models?

In-house platforms, service providers, and software developers are nearly twice as popular sources of generative AI as public models.

When it comes to the generative AI your organization is using, who is supplying the underlying models?

(Percentage of respondents)

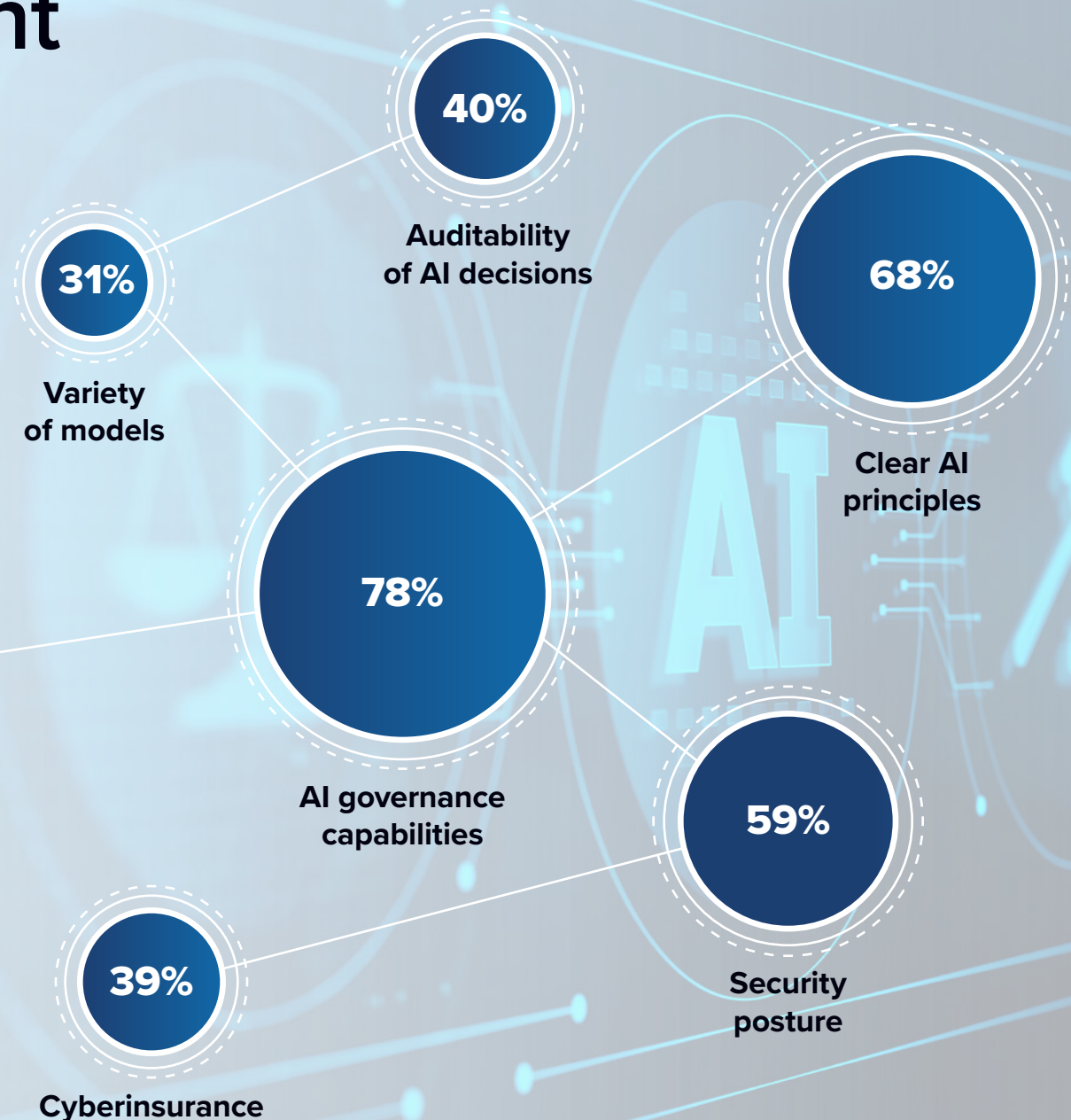


Law firms and corporate organizations are creating more proprietary models than government entities because they have more funding. Government users rely significantly more on software vendors for models.

n = 300 (Total), n = 48 (Corporate), n = 48 (Law firm), n = 35 (Government); Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

What Do End Users Want from a GenAI Provider?

- ✓ **“AI governance”** and **“clear AI principles”** from vendors were essentially must-haves for GenAI, while **security posture** was low on this list.
- ✓ Companies with over \$250 million in revenue indicated, at an average of 86%, that **AI governance** is the most important AI capability vendors must address.
- ✓ **Cyberinsurance** was not prioritized, likely because insurance policies only recover 61% of cybercrime-related losses (according to IDC’s *Future Enterprise Resiliency & Spending Survey Wave 6*, June 2024).



Wrap Up

- ✓ **AI will be a major part of the legal landscape**, but the data suggests that a significant amount of work is necessary to progress in maturity and technical proficiency.
- ✓ Although generative AI will save legal teams time and likely eliminate many frustrations, **it will not be replacing them anytime soon.**
- ✓ **Managing models, policies, and overall generative AI governance will require deploying a significant amount of resources.** Organizations should develop clear AI principles because end users demand transparency.
- ✓ **Even the smallest organizations can transform their practices** and remain competitive.

Appendix: Supplemental Data

The tables in this appendix provide accessible versions of the data for the complex figures in this document. Click “Return to original figure” below each table to get back to the original data figure.

SUPPLEMENTAL DATA FROM PAGE 8

To the best of your knowledge, please estimate the percentage of influence each department has/will have on the AI general technology buying process and the AI governance process in your organization.

	Influence in AI General Technology Buying Process	Influence in AI Governance Process
IT	18%	17%
Legal	18%	21%
Security	9%	10%
Compliance	12%	19%
Board	12%	14%
Finance	13%	9%
Marketing	10%	6%
Procurement/logistics	7%	5%
Other	1%	0%

n = 300; Source: IDC's Generative AI in Legal 2024 Survey, July and October 2024

[Return to original figure](#)

Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 9

What is the status of using generative AI for each of the following legal use cases in your organization?

	Don't expect to use	Expect to use within 5 years	Expect to use within 1 year	Currently use
Legal research	11%	32%	38%	19%
Contract analysis	10%	29%	43%	18%
Timelines and witness prep	27%	28%	37%	8%
Case strategy	23%	29%	38%	10%
Privilege log creation/review	23%	33%	34%	9%
Document review	7%	28%	50%	14%
Legal document generation/summarization	11%	31%	41%	16%
Early case assessment	17%	39%	37%	7%
Data privacy compliance	20%	24%	47%	9%
Data breach response	18%	29%	44%	9%
Compliance	12%	31%	47%	11%
Investigations	22%	25%	44%	9%

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 10

Generative AI Will Revolutionize Document Review

	Very comfortable	Somewhat comfortable	Not comfortable	Not at all comfortable
Investigations	23%	45%	24%	9%
Compliance	26%	55%	15%	4%
Data breach response	18%	48%	27%	7%
Data privacy compliance	22%	41%	28%	9%
Early case assessment	26%	53%	17%	4%
Legal document generation/summarization	36%	51%	8%	4%
Document review	42%	47%	8%	2%
Privilege log creation/review	21%	47%	25%	7%
Case strategy	23%	47%	21%	9%
Timelines and witness prep	21%	41%	27%	12%
Contract analysis	33%	49%	12%	6%
Legal research	38%	50%	10%	3%
Other	33%	60%	7%	0%

n = 300; Source: IDC's Generative AI in Legal 2024 Survey, July and October 2024

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 12
Generative AI Will Revolutionize Document Review

	North America	EMEA	Asia/Pacific
Automation of low-level tasks	57%	61%	52%
Cost savings	49%	47%	46%
Enhance/automate governance, risk, and compliance activities	28%	31%	24%
Legal analysis/contract analysis augmentation/assistance	24%	30%	16%
Enhance legal task routing/knowledge management	21%	18%	20%
Accelerate legal innovation	17%	19%	22%
Enhance contract risk management	21%	17%	10%
Enhance/automate information governance	17%	14%	24%
Provide chat assistant to organization	15%	20%	14%
Enhance/automate data privacy compliance activities	15%	13%	24%
Enhance/automate legal bill analysis	9%	7%	10%
Deflect work from legal	9%	5%	10%

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024
[Return to original figure](#)

Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 15

What are your biggest concerns when it comes to using commercially available public and proprietary private generative AI offerings?

	North America	Asia/Pacific
Loss of sensitive or confidential data	41%	37%
Data bias or poor quality	36%	36%
Lack of accountability	25%	32%
Loss of sensitive or confidential data/sensitive data being input into an LLM	29%	25%
Managing or staffing for training data	10%	19%
AI governance, including unauthorized installation	16%	18%
Lack of explainability	13%	18%
Creation of sensitive or confidential data	21%	16%
Creation of harmful content	19%	13%
Insider risk/data poisoning	12%	11%
Compromise of the LLM (either public or private)	13%	7%
Hallucinations (e.g., false responses)	12%	7%

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 16

Concerns with GenAI Offerings

	Private GenAI Offerings			Public GenAI Offerings		
	North America	EMEA	APAC	North America	EMEA	APAC
Data bias or poor quality	35%	42%	27%	34%	41%	33%
Loss of sensitive or confidential data	37%	38%	38%	41%	43%	36%
Creation of sensitive or confidential data	16%	15%	16%	23%	19%	22%
Managing or staffing for training data	22%	13%	20%	13%	5%	9%
Loss of sensitive or confidential data/sensitive data being input into an LLM	19%	33%	29%	27%	33%	27%
Insider risk/data poisoning	11%	12%	13%	14%	11%	6%
Hallucinations (e.g., false responses)	8%	7%	6%	11%	14%	7%
Lack of explainability	19%	13%	24%	12%	13%	20%
Lack of accountability	35%	27%	35%	26%	27%	22%
Creation of harmful content	13%	13%	11%	22%	16%	16%
AI governance, including unauthorized installation	19%	16%	18%	17%	15%	15%
Compromise of the LLM (either public or private)	9%	5%	6%	11%	13%	20%

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 19

How prepared are legal professionals to handle the following issues when using generative AI?

	Not prepared at all	Getting prepared	Almost prepared	Fully prepared
Data bias or poor quality	16%	47%	25%	12%
Loss of sensitive or confidential data	17%	46%	23%	14%
Creation of sensitive or confidential data	19%	49%	22%	10%
Managing or staffing for training data	14%	49%	30%	7%
Loss of sensitive or confidential data/sensitive data being input into an LLM	20%	48%	21%	12%
Insider risk/data poisoning	22%	45%	23%	10%
Hallucinations (e.g., false responses)	89%	5%	4%	2%
Lack of explainability	27%	44%	21%	8%
Lack of accountability	26%	48%	20%	7%
Creation of harmful content	25%	43%	25%	8%
AI governance, including unauthorized installation	21%	50%	22%	7%
Compromise of the LLM (either public or private)	28%	45%	21%	6%
Other	18%	34%	27%	21%

n = 300; Source: IDC's Generative AI in Legal 2024 Survey, July and October 2024

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 22

When it comes to the generative AI your organization is using, who is supplying the underlying models?

	Total	Corporate	Law firm	Government
In-house proprietary models	45%	50%	46%	37%
Service providers	42%	44%	50%	29%
Models within software tools provided by vendor	42%	40%	38%	51%
Public models	23%	21%	23%	26%
Other	4%	2%	4%	6%

n = 300; Source: IDC's *Generative AI in Legal 2024 Survey*, July and October 2024

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About the IDC Analyst



Ryan O’Leary
Research Director,
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Ryan O’Leary is research director in IDC’s Security and Trust research program covering Privacy and Legal Technology. In this role, Ryan leverages his legal experience to provide perspective on changes in laws, shifting regulation, and other market forces that affect technology decision making today for both law firms and corporations. He also provides thought leadership that technology suppliers and technology buyers may use to develop effective strategy for the future. Ryan’s core research coverage includes the evolution of ediscovery and legal technology as well as the evolution of privacy compliance technology and impacts of new and emerging data privacy regulation.

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