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A Harbor Brief

Benchmarking Library & Information Services Survey 2024

Entering its eighth year, this survey stands as a beacon for law firm information leaders, offering insights into a rapidly shifting landscape. The 2024 survey uncovered critical trends and opportunities, empowering leaders to make informed decisions as AI and advanced technologies redefine the future of legal information. These key takeaways are designed to provide actionable insights and drive innovation within Research and Information Services (RIS) departments.

Hot topic

This year's hot topic, Generative Artificial Intelligence (GenAI), has dominated the industry for the past 18 months.

Many firms now have access to one or more of the commercially available products leveraging large language models. As technology continues to evolve, firms must balance client expectations around their use against real concerns about ethics, intellectual property, and privacy, to name a few areas of concern. As with all innovations in legal technology, firms will need to evaluate their strategy around adoption of GenAI, which greatly impacts RIS departments.

Most survey respondents indicated concerns around the adoption and implementation of GenAI technology. This is mostly due to unanswered questions of client data security, liability and accountability of vendors

and users of tools, and overall trust in the results, even where the large language models are operating within a closed system of verified legal information. For this reason, coupled with the high cost associated with upgrades to AI-enabled tools, many respondents were wary about rolling out GenAI early in the adoption cycle.

To that point, the majority of survey respondents indicated that their firms plan to adopt GenAI in a time frame either "in line with peer firms," or early in the lifecycle - but not first. Of those respondents, most expect that full implementation and adoption of GenAI products will take a year or more, which reflects larger trends around technology in the industry. However, once firms do adopt new technologies, fully training end users and integrating the tools into daily workflows represents an opportunity for RIS departments.

While it's known that many clients anticipate cost savings as an outcome, or benefit, of law firms' adoption of AI tools for legal research, whether and how that may come to be true is still unknown. The data necessary to determine whether GenAI will reduce legal research costs is not yet available, as many firms are suppressing these features or have not yet invested. What is clear, however, is that adoption of GenAI is likely to increase RIS department budgets, with shortfalls needing to be made up elsewhere.

Generally, survey respondents do not anticipate hiring for positions focused on the implementation or use of GenAI tools and are not yet seeking related skills when hiring for open RIS positions. RIS leaders are keenly aware of the potential impacts and changes these tools may bring to their departments, but most firms are not in a place of adoption or implementation where those potential impacts have become a reality.

Only a minority (28%) of all respondents anticipate an impact on the volume of research requests being sent to the RIS team upon adoption of GenAI tools - however, almost all respondents (93%) indicated that there will be an increased need for training on the proper

use of these tools, which may change the roles and responsibilities of some in the department.

The cost to subscribe to existing legal GenAI tools is a frequent topic of conversation in the industry. Outside of the AmLaw 100, the majority of respondents said there would be no budget increases for GenAI spending at this time and across all respondents only 48% indicated that they expect budgets to increase. Similar trends were seen in the 2022 Benchmarking survey's findings around adoption of APIs, machine learning, and related technologies. However, this may not reflect the reality at renewal time, with some vendors forcing moves to their more expansive and expensive products that include GenAI.

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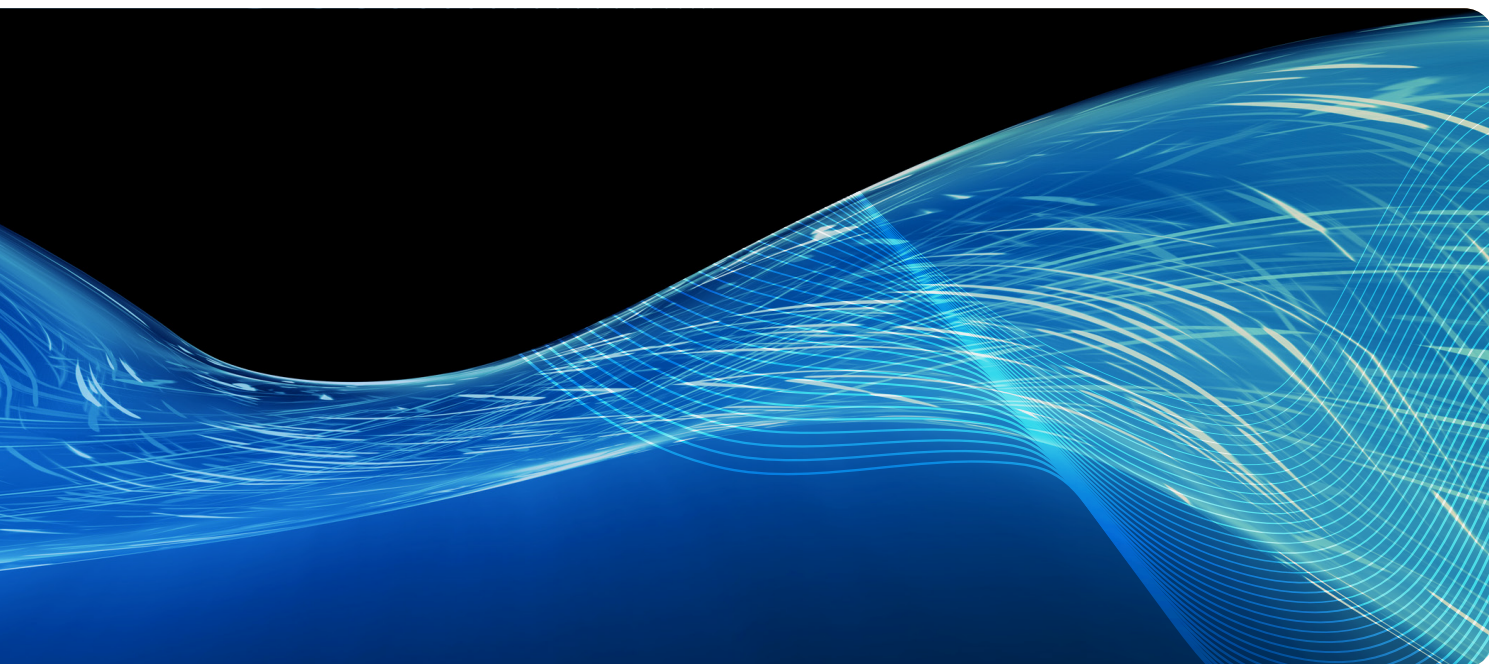
Reallocation of budgets since survey inception

Harbor's Benchmarking survey has had a front-row seat to the steady decline of the once large print collections and the corresponding increased investment in electronic collections.

In 2020, the average responding firm invested $772K in print resources (in the US, only), and $4M (in the US, only) in electronic resources. Put another way, in 2020, for every $1 a respondent invested in print, it invested about $5 in electronic resources.

Ratio of electronic to print spend: 2020 - 2024

As late as 2023, survey results indicated that for every $1 a respondent invested in print resources, it invested about $11 in electronic resources.
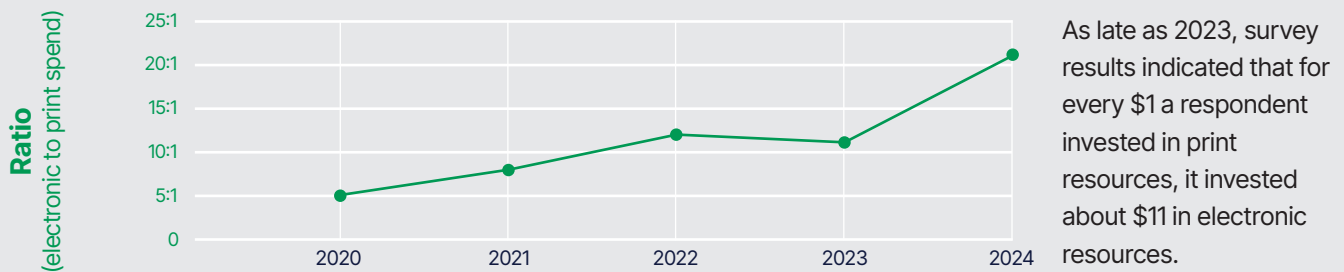
That ratio nearly doubled in 2024, with the average responding firm this year investing $267K in print – representing a 65% decrease in print spend since 2020. Conversely, the responding firms invested $5.7M in electronic resources – representing a 38% increase in electronic spend since 2020. By 2024, for every $1 a respondent invested in print resources, it invested about $21 in electronic resources. [Dollar amounts not controlled for inflation].

Trends in electronic spend vs. print spend: 2020 - 2024

+38%
INCREASE IN ELECTRONIC SPEND SINCE 2020

-65%
REDUCTION IN PRINT SPEND SINCE 2020

● U.S. ELECTRONIC SPEND   ● U.S. PRINT SPEND   ● TOTAL U.S. SPEND
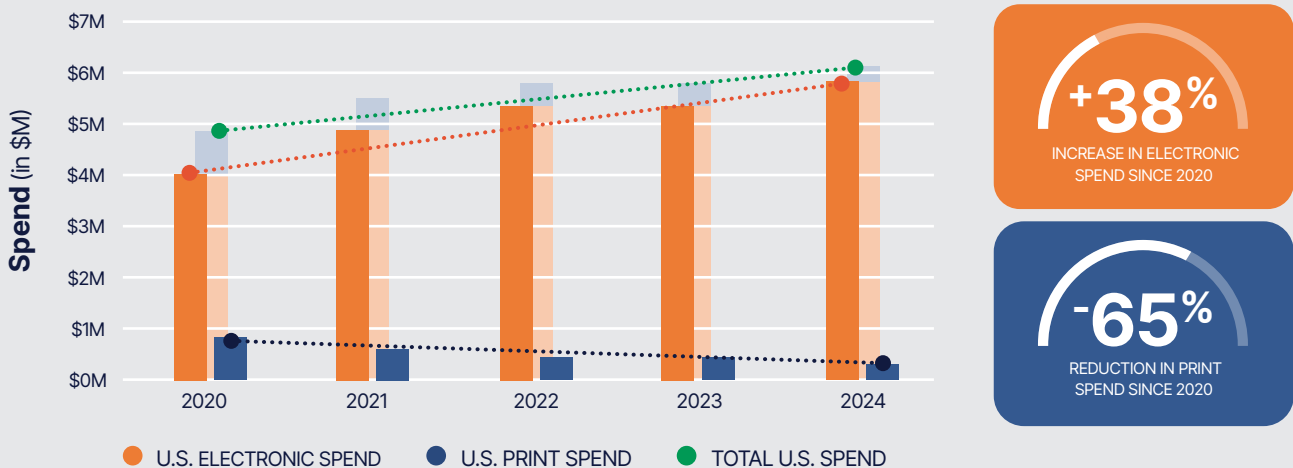
Since 2020, with the increase in remote work, most firms that kept select print copies have since re-allocated those dollars toward electronic versions of the same publications. Over the same period, traditional online legal research platforms (e.g., LexisNexis and Westlaw) have continually added content and features, resulting in an increased investment in those resources.

The survey also asks users about their relationship to certain electronic resources, largely representative of the major tools in the marketplace. In 2020, the survey included 68 electronic resources. By 2024, this increased to 113 – a 66% increase. The sheer number of RIS electronic resources that have emerged in just the last five years has also contributed to increased spending. It's not just a shift from print to digital; there has also been additional investment in new resources.

Although the increase in the print-to-electronic spend ratio is not at all surprising, it highlights the enormous difference in the library of 2024 and the library of 2020.

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Sole provider trends

Among respondents, 75% choose to maintain both platforms, LexisNexis and Westlaw, also known as a "dual provider" environment.

This year's respondents cited two key factors driving this decision: a "loss of content" and the transition difficulties needed to make the switch.

As Thomson Reuters (Westlaw) and RELX (LexisNexis) continue to invest in their GenAI-driven platforms and pass these development costs on to their customers, more firms may feel compelled to consider a deep partnership with one vendor and by default become a sole-provider organization. While many firms have previously explored the sole provider model, the current landscape is markedly different. Both companies are acquiring smaller, standalone products and positioning their platforms as comprehensive, one-stop solutions for legal research and drafting. For most firms, the challenge now extends beyond keeping a single platform such as Lexis. They must also navigate the growing pressure to adopt the entire upgraded RELX suite of bundled products, which adds complexity and cost.

Summary

The data that Harbor analyzed this year showed that law firm libraries are thinking about their futures and their future place within their organizations. Eighteen months after the introduction of GenAI, librarians are confident that they will remain an integral part of the research process in the coming years.

Participate in the 2025 survey

Harbor would like to extend a huge thank you to all the firms who participated in the 2024 survey; your time and effort in pulling together data from various internal sources is appreciated and helps to make our annual survey such a success. Please consider participating in our 2025 survey to gain access to the full results.

Please sign up to participate here.

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Harbor is a globally integrated team of strategists, technologists and specialists focused on helping law firms, corporations, and their law departments achieve breakthrough outcomes. We are also helping to steer a legal industry in the midst of turbulent change. We navigate alongside our clients and partners, providing salient insights, scalable resources, and seasoned advice.

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