

## **Legal Tech Market - Global Outlook & Forecast 2024-2029**

Market Report | 2025-02-25 | 363 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global legal tech market is expected to grow at a CAGR of 12.80% from 2023 to 2029.

### **MARKET TRENDS & DRIVERS**

#### **Rise in Adoption of AI and Cloud Technology in Legal Services**

The adoption of cloud technology in legal services has become a significant trend, accelerating the growth of the global legal tech market. Although the legal sector has been slower in embracing cloud-based solutions, the COVID-19 pandemic and the ensuing shift towards hybrid and remote work have driven law firms and legal departments to prioritize cloud access to ensure operational continuity.

By 2024, the integration of cloud-based legal technologies has surged considerably. According to a recent study, over 70% of legal firms have now incorporated cloud solutions into their operations, reflecting the growing importance of flexibility, scalability, and remote accessibility in the legal industry. This marks a substantial increase from the 58% adoption rate reported by the American Bar Association (ABA) in 2019. The shift towards cloud services is seen as crucial for expanding the legal tech sector, enabling firms to manage cases, documents, and client communication more effectively.

Legal-specific cloud services, such as Clio, Rocket Matter, Practice Panther, NetDocuments, and MyCase, continue to play a pivotal role in this transformation. These platforms offer tailored solutions that meet the unique needs of legal professionals, contributing to the overall growth of the market. As cloud technology adoption increases, the legal industry is expected to see further advancements in operational efficiency, cost management, and client service.

#### **Automation of Legal Workflows for Increased Efficiency**

Automation in legal workflows is transforming how law firms and corporate legal departments operate, allowing them to streamline repetitive and administrative tasks such as document drafting, billing, case management, and contract generation. Automated solutions free legal professionals from time-consuming manual work, enabling them to focus on higher-value tasks,

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thereby improving both productivity and profitability. Automation also helps ensure compliance, reduce human error, and speed up legal processes, contributing to a more agile and responsive legal environment.

Legal technology solutions are now integral to contract management, enabling legal professionals to automate routine tasks, enhance collaboration, and mitigate risks associated with manual processes. These tools reduce the time spent on repetitive tasks, such as drafting contracts, managing documents, and scheduling, allowing attorneys to focus on higher-value activities. As of 2024, legal tech has enabled law firms to save approximately 40% of their time, as highlighted by Lawtech 365, by automating administrative processes. Additionally, businesses globally are leveraging legal technology to streamline workflows, manage information more effectively, and enhance collaboration within their teams. These technologies not only improve efficiency but also contribute to significant cost savings, enabling legal departments to handle more cases with fewer resources while delivering better outcomes for their clients. The increasing reliance on legal tech is reshaping the legal industry's approach to managing workloads, meeting client demands, and optimizing overall performance.

## SEGMENTATION INSIGHTS

### INSIGHTS BY SOLUTION TYPE

The global legal tech market by solution type is segmented into software and services. While the software segment has witnessed substantial growth driven by rising demand for automation and efficiency, services have emerged as the dominant solution type, playing a crucial role in the sector's advancement. Several factors contribute to this dominance such as the complexity of integrating software solutions into existing legal workflows necessitating specialized services. Many law firms and legal departments have unique processes that require tailored implementations to ensure a seamless transition. Service providers excel at customizing software to fit these specific needs, thus reducing the risk of operational disruptions.

Training and ongoing support further reinforce the significance of services in the legal tech market. Many legal professionals may struggle to navigate advanced software functionalities without adequate training, leading to underutilization. Service providers offer essential training programs that empower legal teams to maximize the benefits of technology. Moreover, ongoing maintenance and compliance support are vital for legal firms operating in a highly regulated environment. Service providers not only ensure that software remains updated and compliant with legal standards but also offer risk management consultations.

Segmentation by Solution Type

-□Software

-□Services

### INSIGHTS BY DEPLOYMENT

The global legal tech market by deployment type is segmented into cloud-based, on-premises, and others. The cloud-based deployment segment is poised to dominate the global market, driven by several compelling factors that align with the evolving needs of legal professionals. One of the primary reasons for its dominance is the flexibility and scalability it offers. Cloud-based solutions allow legal firms to quickly adjust their resources based on changing demands, enabling them to scale operations up or down without the need for significant infrastructure investments. This adaptability is particularly crucial in today's fast-paced legal environment, where client needs and market conditions can shift rapidly. Additionally, the cost-effectiveness of cloud-based solutions plays a vital role in their popularity. Law firms can minimize upfront capital expenditures associated with on-premises installations, opting instead for subscription-based models that align costs more closely with usage. This financial model allows smaller firms, in particular, to access advanced legal technologies that might otherwise be prohibitively expensive.

Also, the emphasis on data security and compliance is becoming more critical in the legal sector. Leading cloud service providers invest heavily in robust security measures and compliance protocols, assuring law firms that their sensitive client information is protected. This level of security, combined with the advantages of flexibility, cost savings, and enhanced collaboration, solidifies cloud-based deployment as the dominant choice in the legal tech market.

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#### Segmentation by Deployment Type

- Cloud-based
- On-premises
- Others

#### INSIGHTS BY END-USERS

The law firm end-users segment is anticipated to be the largest revenue contributor in the global legal tech market due to several key factors. First, law firms face increasing pressure to enhance efficiency and reduce operational costs amid growing competition and client expectations for faster service delivery. Legal technology solutions enable these firms to automate routine tasks, streamline workflows, and improve overall productivity, making them a crucial asset for maintaining competitive advantage. Moreover, law firms are often early adopters of technology, recognizing the need to leverage innovative tools to improve client service. The integration of legal tech solutions allows firms to offer enhanced services such as e-discovery, contract management, and legal research, thereby meeting the diverse needs of their clients more effectively.

Additionally, the increasing complexity of legal regulations necessitates that law firms invest in technology that aids compliance and risk management. As firms grapple with the challenges of handling vast amounts of data and maintaining compliance, the demand for tailored legal tech solutions continues to rise. This combination of factors solidifies the position of law firms as the dominant end-user segment in the legal tech market.

#### Segmentation by End-User

- Law Firms
- Corporate Legal Departments
- Others

#### INSIGHTS BY APPLICATION

The global legal tech market by application is segmented into legal research, contract management, e-discovery, practice & case management, intellectual property, and others. The legal research segment is projected to be the largest revenue contributor in the global legal tech market, driven by the increasing complexity of legal information and the demand for efficient access to case law, statutes, and legal precedents. As legal professionals face an ever-growing volume of data, traditional research methods become time-consuming and inefficient. Legal research tools streamline this process, allowing attorneys to quickly locate relevant information, which enhances productivity and accelerates case preparation. Additionally, advancements in artificial intelligence and machine learning have significantly improved the capabilities of legal research platforms. These technologies enable more precise search results, predictive analytics, and data insights, helping legal professionals identify trends and make informed decisions.

Furthermore, as legal regulations and practices continue to evolve, the need for ongoing legal research is critical for compliance and strategic planning. Legal professionals increasingly rely on research tools to stay updated on regulatory changes, ensuring they provide informed counsel to clients. This growing reliance on legal research solutions solidifies its position as the dominant application type in the legal tech market.

#### Segmentation by Application

- Legal Research
- Contract Management
- E-Discovery
- Practice and Case Management
- Intellectual Property
- Others

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## GEOGRAPHICAL ANALYSIS

North America is a dominant region in the global legal tech market, driven by several key factors. First, the presence of a well-established legal industry with numerous law firms, corporate legal departments, and government entities fosters a high demand for innovative legal technologies. The region is home to many leading legal tech companies, such as Thomson Reuters and LexisNexis, which continuously develop and offer advanced solutions tailored to the needs of legal professionals. Furthermore, the increasing adoption of digital transformation initiatives across various sectors, including legal services, is propelling the legal tech market growth. Also, the region benefits from a robust venture capital ecosystem that supports innovation in the legal tech space. Investments in startups and emerging companies lead to the development of cutting-edge solutions that address specific challenges faced by legal professionals. Additionally, a growing focus on compliance, data security, and risk management further drives the adoption of legal tech solutions in North America, solidifying its position as the leading market for legal technology.

Europe is a diverse region, with varying degrees of legal tech adoption across different countries. The U.K. and Germany are the leaders in the European legal tech market, followed by other countries like France, the Netherlands, and the Nordic nations. The market is growing, but it is not as mature as North America, and many legal tech solutions are still in the early stages of adoption. Furthermore, the Asia-Pacific (APAC) region is an emerging legal tech market, with significant growth potential. The legal tech market in APAC is still in its nascent stages, but several countries, such as Australia, Singapore, India, and Japan, are experiencing a rapid uptake of legal technology solutions.

### Segmentation by Geography

#### - North America

- o The U.S.

- o Canada

#### - APAC

- o China

- o India

- o Japan

- o Australia

- o South Korea

- o Singapore

- o Malaysia

- o Rest of APAC

#### - Europe

- o The U.K.

- o Germany

- o France

- o Italy

- o Netherlands

- o Sweden

- o Spain

- o Switzerland

- o Poland

- o Rest of Europe

#### - Latin America

- o Brazil

- o Argentina

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- o Mexico
- Middle East & Africa
- o Saudi Arabia
- o UAE
- o South Africa

## COMPETITIVE LANDSCAPE

The global legal tech market is moderately fragmented, featuring a diverse array of vendors that cater to the evolving needs of legal professionals. This competitive landscape is characterized by a mix of established companies and emerging startups, each offering innovative solutions to improve efficiency, enhance collaboration, and streamline legal processes. Icertis, Inc. is a leading player known for its contract lifecycle management software, which helps organizations manage contracts more effectively. Filevine Inc. provides a case management platform designed to streamline workflows for law firms, enhancing productivity.

### Key Company Profiles

- Thomson Reuters
- LexisNexis
- DocuSign, Inc.
- Casetext Inc.
- ProfitSolv, LLC

### Other Prominent Vendors

- Clio
- Everlaw
- Onit
- Kira Systems
- ContractPodAi
- Smokeball
- LawGeex
- DISCO
- Luminance
- Nuix
- LegalZoom
- Neota Logic
- HotDocs
- eBrevia
- Lex Machina
- LawPay
- PracticePanther
- Juro
- Contractbook
- SimpleLegal

### KEY QUESTIONS ANSWERED:

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1. How big is the global legal tech market?
2. Which region dominates the global legal tech market share?
3. What is the growth rate of the global legal tech market?
4. What are the significant trends in the legal tech market?
5. Who are the key players in the global legal tech market?

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