Clio's Annual Survey

Apple In Law Offices

2013



Clio



SURVEY RESULTS

Clio's annual Apple in Law Offices Survey for 2013 confirmed what industry experts have predicted: Apple devices are becoming more and more popular in the legal industry, reflecting changes in consumer behaviour and the desire for simplicity in both work and play.

As in past years, most of the 838 individuals surveyed (85.14%) were lawyers in small firms (1-10 attorneys) practicing primarily in the United States. Others participating included law students (0.81%), in house counsel (0.92%), practicing lawyers in medium-size law firms of 11-50 attorneys (1.96%), practicing lawyers in large firms of 50 attorneys or more (1.50%), and other (9.68%). The breadth of the survey demonstrates that Apple usage is not just limited to the small town solo lawyer, but is, instead, on pace for industry-wide adoption.



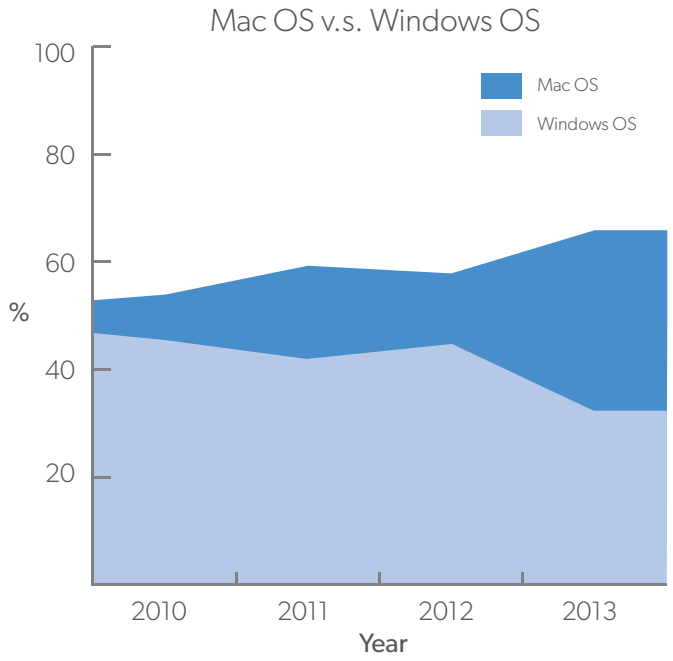
Mac OS was favoured among 66% of survey respondents, while 33% said Windows was their primary operating system.

OPERATING SYSTEM

Operating systems are generally broken down into two camps: Apple users, and Windows users. Since the mid-1980s, Apple products have been relegated to the speciality areas such as graphic design, publishing and marketing[1]. The heavy lifting of business done by accounting and finance, engineers and such was staunchly planted in the PC world. This is changing. According to Business Insider, the November 2013 cover of Bloomberg BusinessWeek[2] illustrating President Obama's struggles with the Healthcare.gov website also showed a partially loaded digital image of Obama with Apple's spinning beach ball icon that displays whenever a Mac freezes up, instead of the familiar hourglass icon Microsoft uses when a PC is locked up. This could be taken as a sign that Apple's Mac OS X is finally becoming mainstream, something unimaginable just a few years ago.

The same mainstreaming can be seen in the legal industry. Mac was overwhelmingly the most popular operating system among those surveyed with 71.43% responding that their primary computer's operating system is Mac, while only 28.57% said they use Windows. This was a dramatic switch from the 2012 Clio survey results, when 43.48% of those responding named Mac as their primary operating system, and 56.52% said they used Windows. This change may have been due in part to the fact that less lawyers practicing in small firms participated in the 2012 survey (76.44%).

In the 2011 Clio survey, Macs were favored among 65% of survey respondents, while 35% said Windows was their primary operating system, very similar to 2010, when 62.5% responded that Mac was their primary operating system, with 37.5% choosing Windows.



[1] http://usatoday30.usatoday.com/tech/story/2012/09/23/pcs-vs-macs-how-they-stack-up/57818700/1

[2] http://www.businessinsider.com/businessweek-cover-chooses-mac-over-pc-2013-10



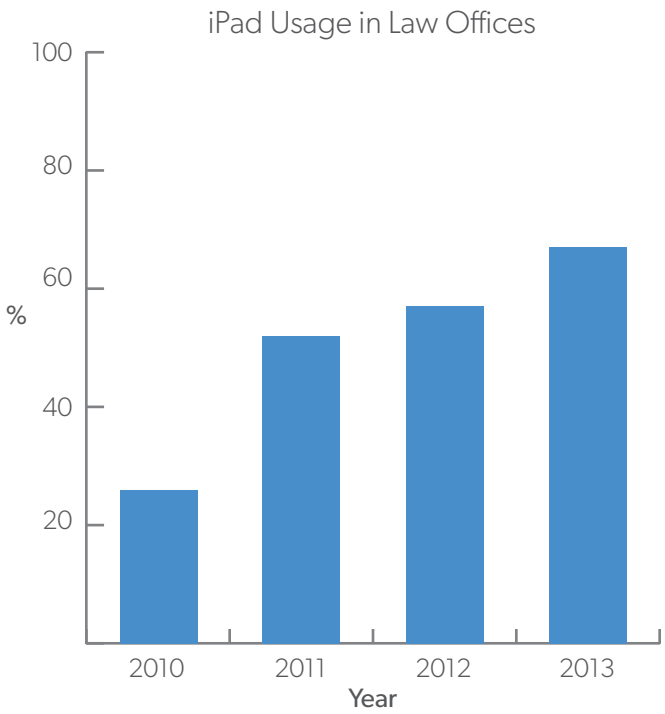
Nearly 75% surveyed in 2013 said they own an iPad.

IPAD USAGE

The iPad brought with it new cries of the end of books, and heralding the beginning of a true paperless age. While there was also some lamenting of no longer being able to snoop on the reading habits of fellow commuters, the iPad never-the-less was embraced by consumers, and has made its way into business. According to a study by Good Technology, a company that makes mobile security applications and tracks mobile device use by businesses, 72% of the mobile devices activated by businesses ran on Apple's iOS. Among tablets, 90% of those devices were iPads, according to the study, and 90% of the custom tablet apps created for businesses were built for the iPad.

Law firms are businesses, too, and iPads are making more than minor inroads. Nearly three-quarters of those surveyed in 2013 said they own an iPad, compared with 69.57% in 2012. In 2011, only 15% of those surveyed owned an iPad, and only 10.42% of lawyers surveyed owned an iPad in 2010. Keep in mind that the iPad made its debut in 2010, so that 10.42% were early adopters but in just three years, the iPad has penetrated the legal market.

In 2012, 57.05% of survey respondents said they currently used an iPad in their law office, while 42.95% they did not. In 2013, 67.18% of those surveyed said they currently use iPads in their law office, while 32.82 said that they do not, reflecting a 10% increase in iPad use in law offices. In 2013, 43.80% responded that they would consider purchasing an iPad for law firm use in the next year, while 56.20 said that they would not.





26% of those surveyed used Dropbox in their law office in 2013. Clio was the cloud-based app of choice for 21% of the respondents, and iCloud came in third at 18%, followed by Google Apps at 14%.

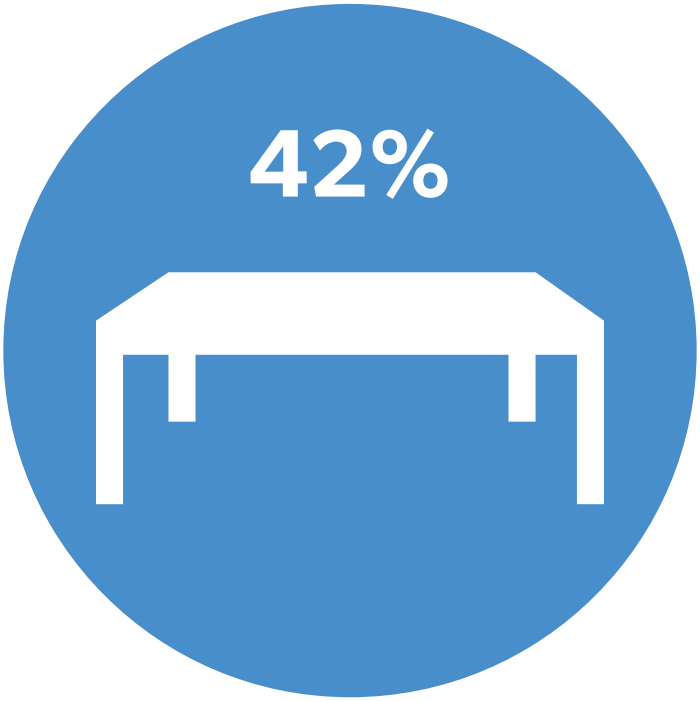
CLOUD-BASED APPLICATIONS

Cloud-based applications, or cloud computing, has taken off in both the consumer and business markets. The legal industry has found itself swept up in the productivity and time-saving benefits of being able to access client files and communications from anywhere. Of those surveyed, 25.91% of those surveyed used Dropbox in their law office in 2013. Clio was the cloud-based app of choice for 20.65% of the respondents, and iCloud came in third at 17.69%, followed by Google Apps at 14.19%.

- QuickBooks Online (4.47%)
- Microsoft Office 365 (4.29%)
- Box (3.38%)
- Rocket Matter (1.21%)
- Freshbooks (0.91%)
- MyCase (0.97%)
- Basecamp (1.15%)
- Xero (0.48%)
- HoudiniEsq (0.12%)
- Firm Manager (0.06%)
- Other (4.53%)

Other cloud applications used included:
The 2012 and 2011 surveys reflected similar responses, with Dropbox (25.82%), Clio (25.66%), iCloud (16.32%), and Google Apps (14.76%) holding the top four positions.
In 2010, the highest%age of those responding to the survey chose Other (38.56%), while 30.45% were utilizing Google Apps, 9.73% of those surveyed stated that they were using Clio, 7.39% were using QuickBooks Online, 5.95% were using Basecamp, 4.50% were using Rocket Matter, 2.16% were using Freshbooks, and 1.26% were using HoudiniEsq.

Lawyers may find major differences between the security and service features available in cloud based products developed for the general public versus ones especially for the legal community. These different features will typically be reflected in the service level agreements provided by vendors, who may or may not understand the importance of confidentiality and security regarding legal matters, according to the American Bar Association. Some of the cloud-based applications developed specifically 4 for the legal profession include Clio, HoudiniEsq, and Rocket Matter.



42% of the respondents said they used Microsoft Office as their desktop application, 18% chose Evernote, and 11% iWork.

DESKTOP APPLICATIONS

Microsoft Office, Evernote, and iWork remained the top three desktop applications in the law offices of those surveyed from 2011-2013. In the 2013 survey, 41.92% of the respondents said they used Microsoft Office as their desktop application, 17.94% chose Evernote, and 11.37 iWork. Other desktop applications used among those surveyed included:

- Parallels (9.68 percent)
- OpenOffice (5.06 percent)
- VMWare Fusion (3.73 percent)
- Billings (2.93 percent)
- Daylite (1.78 percent)
- Lawstream (0.36 percent)
- Other (5.24 percent)

When asked, "What most influenced your decision to select Apple over PC products?" the response among those completing the Clio survey has not changed much from 2010-2013. Although the%ages have varied slightly since 2010, reliability and security remain the primary reasons individuals surveyed picked Apple over PCs for use in their law office, with 52.62% choosing that response in the 2013 survey.

Usability came in second at 28.39%, and familiarity due to at home use of Apple products was third at 10.85%. A little less than three% of survey respondents said they chose Apple products for hardware, aesthetics, and design features, and just 0.54% stated that the reason they favor Apple over PC is better support of graphics and photos, perhaps dispelling the belief that people choose Apple mostly for their superior graphics capabilities, or simply because Apple is the trendier choice.

According to the Clio survey, once they go Apple, law offices say they won't go back. Apple users love Apple products, and when asked if they would choose Apple again if they had to re-implement their office's IT needs, 96.58% of those surveyed in 2013 said they would. Of those who didn't use Apple, 16.21% said they would consider switching to them in the next year.

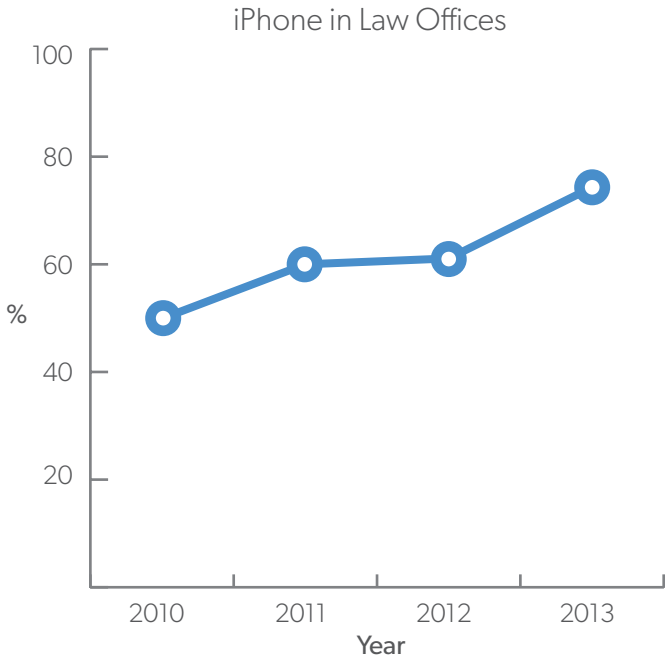
In 2012, 96.82% said they would choose Apple again, and 24.72% responded that they would consider switching to Apple in their law offices in the next year, while 75.28% said they would not. Those surveyed in 2011 overwhelmingly said they would choose Apple again (97.72%), and 35.87% responded that they were considering switching to Apple in the next year. In 2010, 98.36% said they would choose Apple again, while 19.42% said they were considering converting their law office to Apple in the next year.



When asked what mobile devices they currently use, nearly three-quarters of those surveyed said iPhones.

MOBILE DEVICES

The iPhone remained extremely popular among those completing the Clio survey, and over 80% stated that they either use iPhones currently or plan on doing so in the next year. When asked what mobile devices they currently use, nearly three-quarters of those surveyed (74.25%) said iPhones, according to 2013 survey results. Android came in a distant second at 17.84%, followed by Windows at 2.24%, Blackberry at 1.92%, with 3.74% of those taking the survey choosing the "other" response.



The vast majority of survey respondents do not plan on changing mobile devices in the next year (86.39%), although 9.28% said they plan on switching to an iPhone, 2.89% said they'll choose Android, 0.24% plan to switch to a Windows mobile device, and 0.60% said they will change to a BlackBerry. The iPhone was the top choice in previous surveys as well, and continues to gain momentum. In 2012, 62.38% of those surveyed were iPhone users, with 60.90% choosing iPhones in 2011 and 50.30% in 2010. Among those considering switching mobile devices, 15.48% of survey respondents said they planned to switch to an iPhone in the 2012 survey, 18.35% in 2011, and 17.74% in 2010.

In terms of the popularity of mobile devices among other types of businesses, according to Forbes, executives are choosing to use mobile devices to conduct business transactions in greater numbers than ever before, as shown by a 2013 survey of 511 executives.[3] The Forbes survey found that more and more senior-level executives are researching products and services leading to purchases on their mobile devices instead of their desktop computers, and are making direct purchases from suppliers through mobile websites and applications.

[3] http://www.forbes.com/sites/joemckendrick/2013/07/02/executives-now-use-mobile-devices-for-large-business-purchases-survey-finds/

LAW FIRMS: APPLE OR PC?

Before smartphones and the Internet made choosing a platform a personal choice, lawyers had to use PCs for the simple fact that so few legal-specific applications existed for Apple. That did not prevent lawyers from purchasing Apple devices, be it computers, laptops, iPods, iPhones or iPads, for home use. In fact, for personal computer users, Apple topped the 2013 American Customer Satisfaction Index survey[4] for the tenth consecutive year, and the satisfaction that many Apple users have with the computers they rely on for home use translates into more and more Apple products in the business environment.

While the common saying in the legal industry is that the law is always behind the times, the Clio survey suggests a sea change in technology adoption. Two-thirds, or 66.09 percent of those surveyed by Clio in 2013 stated that they currently use Apple devices in their law office, an increase from 55.55 percent the year before. In 2011, 57.87 percent of lawyers surveyed used Apple in their office, compared with 54.60 percent in 2010.

Overall, 11.49 percent more law offices surveyed used Apple in 2013 than did in 2010, with over 50 percent of those surveyed in 2013 stating that they chose Apple because of their reliability and security. One does not need to do much Googling to find news related to a security breach, exposing millions of credit card numbers, usernames, passwords or just about anything one posts to the Internet. Since lawyers are constantly dealing with confidential information, and technology has advanced to the point where lawyers can choose the platform they want, it is not surprising many have switched to Apple for its security and reliability. However, as Apple becomes more popular with businesses, they also become targets. Any technology platform, then, is only as safe as its antivirus software and security measures.

Though most choose Apple for reliability and security, ten percent indicated they chose Apple for use in the law office because of a familiarity due to home use, and three percent said esthetics and design were the main reason they chose Apple.

While current lawyers are moving towards Apple, the survey suggests the next generation of lawyers appears to already be solidly in the Apple camp, with 100 percent of the students surveyed in 2013 stating that they would choose Apple as the basis for their office IT needs.

[4] http://blog.portableone.com/apple-mac-in-business/apple-tops-customer-satisfaction-surveys/

SOURCES

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