

eDiscovery Business Confidence Survey Meta Results (Winter 2016 - Fall 2018)

Winter 2016	Spring 2016	Summer 2016	Fall 2016	Winter 2017	Spring 2017	Summer 2017	Fall 2017	Winter 2018	Spring 2018	Summer 2018	Fall 2018
N = 80 Respondents	N = 76 Respondents	N = 168 Respondents	N = 113 Respondents	N = 100 Respondents	N = 104 Respondents	N = 101 Respondents	N = 100 Respondents	N = 100 Respondents	N = 100 Respondents	N = 66 Respondents	N = 85 Respondents
Required Questions (1-5)											
1. Which of the following segments best describes your business in eDiscovery?											
Part of the eDiscovery ecosystem where your organization resides.											
Software and/or Services Provider - 37.5% (30)	Software and/or Services Provider - 39.9% (30)	Software and/or Services Provider - 32.7% (55)	Software and/or Services Provider - 33.6% (38)	Software and/or Services Provider - 40% (40)	Software and/or Services Provider - 44.2% (45)	Software and/or Services Provider - 39.6% (40)	Software and/or Services Provider - 44% (44)	Software and/or Services Provider - 42% (42)	Software and/or Services Provider - 30% (30)	Software and/or Services Provider - 39.4% (26)	Software and/or Services Provider - 37.6% (32)
Consultancy - 31.3% (25)	Law Firm - 23.7% (18)	Law Firm - 33.9% (57)	Law Firm - 28.3% (32)	Law Firm - 33% (33)	Law Firm - 30.8% (32)	Law Firm - 34.6% (35)	Law Firm - 35% (35)	Law Firm - 34% (34)	Law Firm - 29% (29)	Law Firm - 28.8% (19)	Law Firm - 35.3% (30)
Law Firm - 20% (16)	Consultancy - 22.4% (17)	Consultancy - 13.7% (23)	Consultancy - 16.8% (19)	Consultancy - 16% (16)	Consultancy - 14.4% (15)	Consultancy - 16.8% (17)	Consultancy - 11% (11)	Consultancy - 13% (13)	Consultancy - 33% (33)	Consultancy - 22.7% (15)	Consultancy - 17.6% (15)
Other - 6.3% (5)	Corporation - 5.3% (4)	Corporation - 11.9% (20)	Corporation - 10.8% (12)	Corporation - 4% (4)	Corporation - 4.8% (5)	Corporation - 3% (3)	Corporation - 4% (4)	Corporation - 5% (5)	Corporation - 5% (5)	Corporation - 4.5% (3)	Corporation - 1.2% (1)
Media/Research Organization - 3.7% (3)	Media/Research Organization - 5.3% (4)	Media/Research Organization - 0.9% (1)	Media/Research Organization - 0.9% (1)	Media/Research Organization - 2% (2)	Media/Research Organization - 1.9% (2)	Media/Research Organization - 3% (3)	Media/Research Organization - 0% (0)	Media/Research Organization - 0% (0)	Media/Research Organization - 0% (0)	Media/Research Organization - 0% (0)	Media/Research Organization - 0% (0)
Governmental Entity - 0% (0)	Other - 2.6% (2)	Other - 4.2% (7)	Other - 4.4% (5)	Other - 2% (2)	Other - 2.9% (3)	Other - 1% (1)	Other - 3% (3)	Other - 5% (5)	Other - 2% (2)	Other - 1.5% (1)	Other - 3.5% (3)
Governmental Entity - 0% (0)	Governmental Entity - 1.3% (1)	Governmental Entity - 3% (5)	Governmental Entity - 5.3% (6)	Governmental Entity - 3% (3)	Governmental Entity - 1% (1)	Governmental Entity - 2% (2)	Governmental Entity - 3% (3)	Governmental Entity - 1% (1)	Governmental Entity - 1% (1)	Governmental Entity - 3% (2)	Governmental Entity - 4.7% (4)
2. How would you rate the current general business conditions for eDiscovery in your segment?											
Subjective feeling of business performance when compared with business expectations.											
Good - 58.8% (47)	Good - 61.8% (47)	Good - 47.8% (80)	Good - 56.6% (64)	Good - 49% (49)	Good - 52.9% (55)	Good - 53.4% (54)	Good - 55% (55)	Good - 59% (59)	Good - 59% (59)	Good - 59% (59)	Good - 62.4% (53)
Normal - 31.3% (25)	Normal - 34.2% (26)	Normal - 38.7% (65)	Normal - 37.2% (42)	Normal - 42% (42)	Normal - 40.4% (42)	Normal - 41.9% (42)	Normal - 38% (38)	Normal - 34% (34)	Normal - 25% (25)	Normal - 39.4% (26)	Normal - 34.1% (29)
Bad - 10% (8)	Bad - 3.9% (3)	Bad - 13.7% (23)	Bad - 6.2% (7)	Bad - 9% (9)	Bad - 6.7% (7)	Bad - 5% (5)	Bad - 7% (7)	Bad - 9% (9)	Bad - 7% (7)	Bad - 7.6% (5)	Bad - 3.5% (3)
3. How do you think the business conditions will be in your segment six months from now?											
Subjective feeling of business performance when compared with business expectations.											
Same - 51.2% (41)	Better - 53.9% (41)	Better - 44.6% (75)	Better - 49.6% (56)	Better - 40% (40)	Better - 47.1% (49)	Better - 43.6% (44)	Better - 55% (55)	Better - 56% (56)	Better - 50% (50)	Better - 50% (33)	Better - 44.7% (38)
Better - 42.5% (34)	Same - 43.4% (33)	Same - 52.4% (88)	Same - 45.1% (51)	Same - 56% (56)	Same - 49% (51)	Same - 49.5% (50)	Same - 41% (41)	Same - 39% (39)	Same - 44% (44)	Same - 45.5% (30)	Same - 51.8% (44)
Worse - 6.3% (5)	Worse - 2.6% (2)	Worse - 3% (5)	Worse - 5.3% (6)	Worse - 4% (4)	Worse - 3.8% (4)	Worse - 6.9% (7)	Worse - 4% (4)	Worse - 5% (5)	Worse - 6% (6)	Worse - 4.5% (3)	Worse - 3.5% (3)
4. How would you guess revenue in your segment of the eDiscovery ecosystem will be six months from now?											
Revenue is income generated from eDiscovery-related business activities.											
Higher - 60% (48)	Higher - 57.9% (44)	Higher - 50% (84)	Higher - 59.3% (67)	Higher - 52% (52)	Higher - 59.6% (62)	Higher - 50.5% (51)	Higher - 56% (56)	Higher - 55% (55)	Higher - 59% (59)	Higher - 57.6% (38)	Higher - 57.6% (49)
Same - 39% (39)	Same - 39% (30)	Same - 41.7% (70)	Same - 35.4% (40)	Same - 38% (38)	Same - 33.7% (35)	Same - 43.6% (44)	Same - 39% (39)	Same - 38% (38)	Same - 37% (37)	Same - 34.8% (23)	Same - 36.5% (31)
Lower - 5% (4)	Lower - 2.6% (2)	Lower - 8.3% (14)	Lower - 5.3% (6)	Lower - 10%	Lower - 6.7% (7)	Lower - 5.9% (6)	Lower - 5% (5)	Lower - 7% (7)	Lower - 4% (4)	Lower - 7.6% (5)	Lower - 5.9% (5)
5. How would you guess profits in your segment of the eDiscovery ecosystem will be six months from now?											
Profit is the amount of income remaining after accounting for all expenses, debts, additional revenue streams, and operating costs.											
Higher - 45% (36)	Same - 51.9% (39)	Same - 47% (79)	Same - 47.8% (54)	Same - 47% (47)	Same - 43.3% (45)	Same - 49.5% (50)	Same - 44% (44)	Same - 38% (38)	Same - 33% (33)	Same - 42.4% (28)	Same - 45.9% (39)
Same - 49% (39)	Higher - 39.5% (30)	Higher - 38.7% (65)	Higher - 41.6% (47)	Higher - 39% (39)	Higher - 50% (52)	Higher - 39.6% (40)	Higher - 45% (45)	Higher - 45% (45)	Higher - 53% (53)	Higher - 45.5% (30)	Higher - 41.2% (35)
Lower - 10% (8)	Lower - 9.2% (7)	Lower - 14.3% (24)	Lower - 10.6% (12)	Lower - 14% (14)	Lower - 6.7% (7)	Lower - 10.9% (11)	Lower - 11% (11)	Lower - 17% (17)	Lower - 14% (14)	Lower - 12.1% (8)	Lower - 12.9% (11)
6. Of the six items presented below, what is the issue that you feel will most impact the business of eDiscovery over the next six months?											
Challenges that may directly impact the business performance of your organization.											
Budgetary Constraints - 22.9% (18)	Budgetary Constraints - 28.9% (22)	Budgetary Constraints - 26% (47)	Budgetary Constraints - 24.8% (28)	Budgetary Constraints - 26% (26)	Budgetary Constraints - 21.2% (22)	Budgetary Constraints - 20.8% (21)	Budgetary Constraints - 31% (31)	Budgetary Constraints - 24% (24)	Budgetary Constraints - 22% (22)	Budgetary Constraints - 22.7% (15)	Budgetary Constraints - 14.1% (12)
Data Security - 21.3% (17)	Increasing Volumes of Data - 26.3% (20)	Increasing Volumes of Data - 26.6% (48)	Increasing Volumes of Data - 28.6% (38)	Increasing Volumes of Data - 26% (26)	Increasing Volumes of Data - 25% (26)	Increasing Volumes of Data - 20.8% (21)	Increasing Volumes of Data - 24% (24)	Increasing Volumes of Data - 30% (30)	Increasing Volumes of Data - 21% (21)	Increasing Volumes of Data - 16.7% (11)	Increasing Volumes of Data - 18.8% (16)
Increasing Volumes of Data - 20% (16)	Data Security - 15.8% (12)	Data Security - 7.1% (11)	Data Security - 9.7% (11)	Data Security - 15% (15)	Data Security - 16.3% (17)	Data Security - 11.9% (12)	Data Security - 13% (13)	Data Security - 13% (13)	Data Security - 19% (19)	Data Security - 19.7% (13)	Data Security - 15.3% (13)
Lack of Personnel - 16.2% (13)	Lack of Personnel - 14.3% (10)	Lack of Personnel - 14.3% (24)	Lack of Personnel - 9.7% (11)	Lack of Personnel - 8% (8)	Lack of Personnel - 20.2% (21)	Lack of Personnel - 14.2% (15)	Lack of Personnel - 11% (11)	Lack of Personnel - 9% (9)	Lack of Personnel - 11% (11)	Lack of Personnel - 13.9% (9)	Lack of Personnel - 17.6% (15)
Increasing Types of Data - 13.8% (11)	Increasing Types of Data - 10.5% (8)	Increasing Types of Data - 10.1% (17)	Increasing Types of Data - 15.9% (18)	Increasing Types of Data - 17% (17)	Increasing Types of Data - 10.6% (11)	Increasing Types of Data - 21.7% (22)	Increasing Types of Data - 11% (11)	Increasing Types of Data - 18% (18)	Increasing Types of Data - 16% (16)	Increasing Types of Data - 21.2% (14)	Increasing Types of Data - 20.0% (17)
Inadequate Technology - 6.3% (5)	Inadequate Technology - 5.3% (4)	Inadequate Technology - 11.9% (23)	Inadequate Technology - 6.2% (7)	Inadequate Technology - 9% (9)	Inadequate Technology - 6.7% (7)	Inadequate Technology - 9.9% (10)	Inadequate Technology - 10% (10)	Inadequate Technology - 8% (8)	Inadequate Technology - 11% (11)	Inadequate Technology - 6.1% (4)	Inadequate Technology - 14.1% (12)
7. In which geographical region do you primarily conduct eDiscovery-related business?											
The location from which you are basing your business assessments.											
North America - 95.8% (75)	North America - 90.8% (69)	North America - 95.2% (160)	North America (United States) - 75.2% (85)	North America (United States) - 80% (80)	North America (United States) - 83.7% (87)	North America (United States) - 88.0% (89)	North America (United States) - 89.0% (89)	North America (United States) - 92.0% (92)	North America (United States) - 81.0% (81)	North America (United States) - 83.3% (55)	North America (United States) - 80.0% (68)
Europe - 3.7% (3)	Europe - 6.6% (5)	Europe - 3.6% (6)	Europe - 4.4% (5)	Europe (UK) - 5% (5)	Europe (UK) - 2.9% (3)	Europe (UK) - 4% (4)	Europe (UK) - 3% (3)	Europe (UK) - 3% (3)	Europe (UK) - 6% (6)	Europe (UK) - 4.5% (3)	Europe (UK) - 4.7% (4)
Asia/Asia Pacific - 2.5% (2)	Asia/Asia Pacific - 2.6% (2)	Asia/Asia Pacific - 1.2% (2)	Asia/Asia Pacific - 0% (0)	Asia/Asia Pacific - 2% (2)	Asia/Asia Pacific - 1% (1)	Asia/Asia Pacific - 0% (0)	Asia/Asia Pacific - 1% (1)	Asia/Asia Pacific - 1% (1)	Asia/Asia Pacific - 1% (1)	Asia/Asia Pacific - 6.1% (4)	Asia/Asia Pacific - 4.7% (4)
Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)	Central/South America - 0% (0)
Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)	Middle East/Africa - 0% (0)
8. What are the primary functions in the conduct of your organization's eDiscovery-related business?											
Legal/Litigation Support - 65% (52)	Legal/Litigation Support - 72.4% (55)	Legal/Litigation Support - 78.8% (129)	Legal/Litigation Support - 78% (79)	Legal/Litigation Support - 79% (79)	Legal/Litigation Support - 74.2% (75)	Legal/Litigation Support - 69% (69)	Legal/Litigation Support - 58% (58)	Legal/Litigation Support - 69% (69)	Legal/Litigation Support - 69% (69)	Legal/Litigation Support - 75.7% (50)	Legal/Litigation Support - 76.5% (65)
Business/Business Support (All Other Business Functions) - 30% (24)	Business/Business Support (All Other Business Functions) - 25% (19)	Business/Business Support (All Other Business Functions) - 17.9% (30)	Business/Business Support (All Other Business Functions) - 16.8% (19)	Business/Business Support (All Other Business Functions) - 19% (19)	Business/Business Support (All Other Business Functions) - 18.3% (19)	Business/Business Support (All Other Business Functions) - 21.8% (22)	Business/Business Support (All Other Business Functions) - 26% (26)	Business/Business Support (All Other Business Functions) - 30% (30)	Business/Business Support (All Other Business Functions) - 29% (29)	Business/Business Support (All Other Business Functions) - 18.2% (12)	Business/Business Support (All Other Business Functions) - 17.6% (15)
IT/Product Development - 5% (4)	IT/Product Development - 5.6% (4)	IT/Product Development - 4.4% (8)	IT/Product Development - 3% (3)	IT/Product Development - 3% (3)	IT/Product Development - 5.8% (6)	IT/Product Development - 4% (4)	IT/Product Development - 5% (5)	IT/Product Development - 11% (11)	IT/Product Development - 6% (6)	IT/Product Development - 6.1% (4)	IT/Product Development - 5.3% (5)
9. What are the primary support levels in the conduct of your organization's eDiscovery-related business?											
Executive Leadership - 56.3% (45)	Executive Leadership - 59.0% (45)	Executive Leadership - 54.5% (98)	Executive Leadership - 56.9% (65)	Executive Leadership - 38% (38)	Executive Leadership - 44.2% (46)	Executive Leadership - 41.6% (42)	Executive Leadership - 48% (48)	Executive Leadership - 52% (52)	Executive Leadership - 50% (50)	Executive Leadership - 45.4% (30)	Executive Leadership - 41.2% (35)
Operational Management - 21.9% (17)	Operational Management - 22.8% (17)	Operational Management - 34.5% (58)	Operational Management - 38.9% (44)	Operational Management - 39% (39)	Operational Management - 27.9% (29)	Operational Management - 34.6% (35)	Operational Management - 36% (36)	Operational Management - 29% (29)	Operational Management - 34% (34)	Operational Management - 27.3% (18)	Operational Management - 30.8% (26)
Tactical Execution - 22.9% (18)	Tactical Execution - 21.1% (16)	Tactical Execution - 31% (52)	Tactical Execution - 34.5% (39)	Tactical Execution - 23% (23)	Tactical Execution - 27.9% (29)	Tactical Execution - 23.8% (24)	Tactical Execution - 16% (16)	Tactical Execution - 23% (23)	Tactical Execution - 31% (31)	Tactical Execution - 27.3% (18)	Tactical Execution - 26.2% (24)
Optional Questions (10-12)											
10. How would you characterize the trajectory of your organization's Days Sales Outstanding (DSO) during the last quarter? (n=78)											
											Increasing - 17.9% (14)
											Unfluctuating - 53.3% (26)
											Decreasing - 7.7% (6)
											Do Not Know - 41.0% (32)
11. How would you characterize the trajectory of your organization's Monthly Recurring Revenue (MRR) during the last quarter? (n=77)											
											Increasing - 39.0% (30)
											Unfluctuating - 24.7% (16)
											Decreasing - 3.9% (3)
											Do Not Know - 33.8% (26)
12. Which of the following statements best describes the distribution of your organization's revenue across your customer base during the last quarter? (n=77)											
											Increasing - 42.9% (33)
											Unfluctuating - 24.7% (19)
											Decreasing - 5.2% (4)
											Do Not Know - 27.3% (21)

The eDiscovery Business Confidence Survey is a non-scientific quarterly survey designed to provide insight into the business confidence level of individuals working in the eDiscovery ecosystem. The survey consists of multiple choice questions focused on factors related to the creation, delivery, and consumption of eDiscovery products and services. The survey is open to legal, business, and information technology professionals operating in the eDiscovery ecosystem and individuals are invited to participate via the ComplexDiscovery blog, via social media, and via direct email invitations. (Source: ComplexDiscovery.com)

