US IN-HOUSE COUNSEL POPULATION STATISTICS

Analyzing Growth and Market Trends

Introduction

A professional association's ability to effectively serve its members and community is directly tied to its understanding of the profession's dynamics, including the size and characteristics of its workforce. For many professions, particularly those that are not regulated, obtaining accurate workforce data is a significant challenge. However, this is not the case for lawyers in the US, who must be licensed and register with a state bar association. Yet, even with this clear data source, a precise count of practicing attorneys is difficult due to lawyers being registered in multiple states or being registered but not actively practicing.

The challenge intensifies when attempting to quantify the specific population of in-house counsel. Because state bar registrations do not track a lawyer's employer category, other reliable data sources are necessary to arrive at a reasonable estimate. The U.S. Bureau of Labor Statistics (BLS) provides a crucial resource for this purpose, offering publicly available government data on occupational employment.

This white paper analyzes the BLS data to explore **key population trends** of in-house counsel in the US. By dissecting these statistics, we aim to provide a data-driven understanding of the **growth and geographical distribution** of this crucial segment of the legal profession. This analysis is essential for professional associations, law firms, and corporations seeking to understand how the broader legal landscape is evolving.

Key Takeaways

1. The In-house Counsel Population Has Grown Dramatically and Consistently

The number of in-house counsel in the United States (US) has nearly doubled since 2008, increasing from 78,000 to 145,000 in 2024, an 87% growth. This growth rate significantly outpaces the growth of lawyers in law firms (23%) and government roles (38%) over the same period. After a brief decline during the Great Recession and a stall in 2020 due to the COVID-19 pandemic, the growth has been particularly acute since 2021, suggesting a sustained and accelerated trend of attorneys moving in-house or starting their careers there.

2. Geographical Distribution is Shifting

While the most populous states (New York, California, and Texas) hold the largest number of in-house counsel, the growth is not uniform. The analysis reveals two distinct patterns of growth:

- **High-Population Growth Markets:** States like New York (+45%), Texas (+46%), and Florida (+55%) have seen significant numerical increases in their in-house counsel populations, adding thousands of new positions.
- **High-Percentage Growth in Smaller Markets:** States with smaller initial populations, such as Wyoming (+150%), Vermont (+90%), and Montana (+56%), experienced dramatic percentage increases, highlighting the expansion of in-house legal roles into new areas.

3. Concentration of In-house Counsel Varies by State

When the in-house counsel population is standardized by the overall state population, a clearer picture of market concentration emerges. Washington D.C. is an outlier, with an extremely high concentration of in-house counsel at 562 per 100,000 people in 2024, nearly five times greater than the next highest state. The Northeast, with states like New York (117), Massachusetts (92), and Connecticut (66), shows the highest concentration of in-house counsel. Conversely, states like California (44), Florida (37), and Texas (37) rank in the mid-range despite their large overall populations, indicating that while their numerical growth is substantial, their in-house legal workforce is less concentrated per capita.

The Data: Calculating In-house Counsel Population Estimates

The BLS produces an annual Occupational Employment and Wage Statistics (OEWS) report with several key statistics for various occupations. This survey-based data includes research estimates of the number of individuals in a profession by industry, state, and metropolitan area, among other breakdowns.

Based on this data, we calculate an estimate of the number of in-house counsel in the US. We use the total number of “lawyers” as our base, and then subtract the lawyers employed by law firms, i.e., legal services, and the government. We assume that any lawyer not employed by a law firm or the government is working as in-house counsel. The calculation formula is as follows:

In-house counsel = Total lawyers — Law firm lawyers — Government lawyers

This same estimate can be applied to calculate the number of in-house counsel in every US state and by industry, though this analysis will focus on the nationwide growth and geographical distribution of the in-house counsel population by state.

The Consistent Growth of the In-house Legal Profession

The BLS data series for lawyers extends back to 2008, providing a 17-year history of employment trends. The most recent report, published in May 2025, includes data up to 2024.

The growth of the in-house counsel population is remarkable over this period. Figure 1 reports the number of lawyers by class (i.e., in-house, law firms, and government), per year, showing that most lawyers in the country are employed at law firms, with government lawyers and in-house counsel representing a growing minority.

The pace of growth for in-house counsel is particularly notable. In 2008, there was an estimated number of 78,000 in-house counsel, a number that has nearly doubled to 145,000 in 2024. The in-house counsel population nearly reached the number of government lawyers in 2023, though the latter saw a slight increase in 2024, with about 12,000 more government lawyers than in-house counsel.

Figure 1. US Lawyer Population by Type, 2008-2024

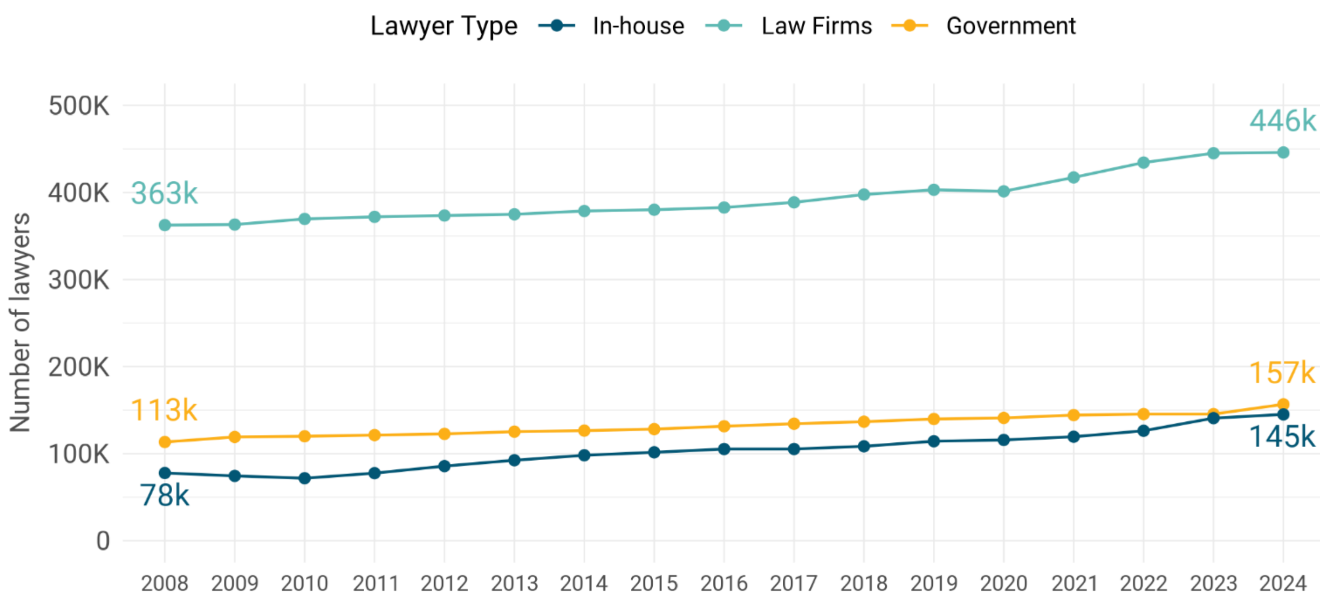
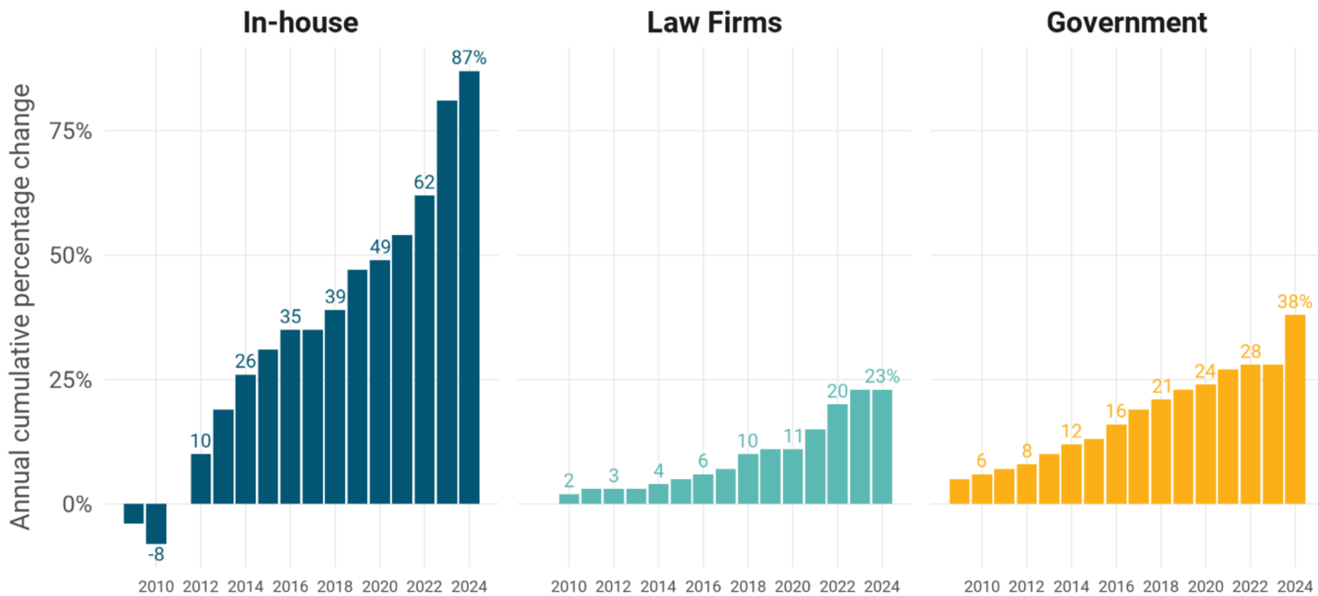


Figure 2 illustrates the scope of this substantial increase when comparing it to the growth pace of lawyers in the other two categories. Since the 2008 baseline, the in-house counsel population has increased a massive 87 percent compared to just 23 percent for law firm lawyers and 38 percent for government lawyers—though the latter experienced a substantial bump in 2024.

Looking into this evolution in detail is revealing, appreciating that this growth has not been linear. In the first two years of these series, coinciding with the Great Recession, the number of in-house counsel declined by eight percent. A modest recovery began in 2011, followed by consistent growth until a stall in 2020, likely due to the effects of the Covid-19 pandemic. Growth was still slow in 2021, but has been even more acute since then, suggesting that a larger number of attorneys are either moving in-house or starting their careers in-house directly after law school.

Figure 2. Percentage Change in US Lawyer Population by Type Since 2008



Diverging Markets: Analyzing In-house Population Trends by US State

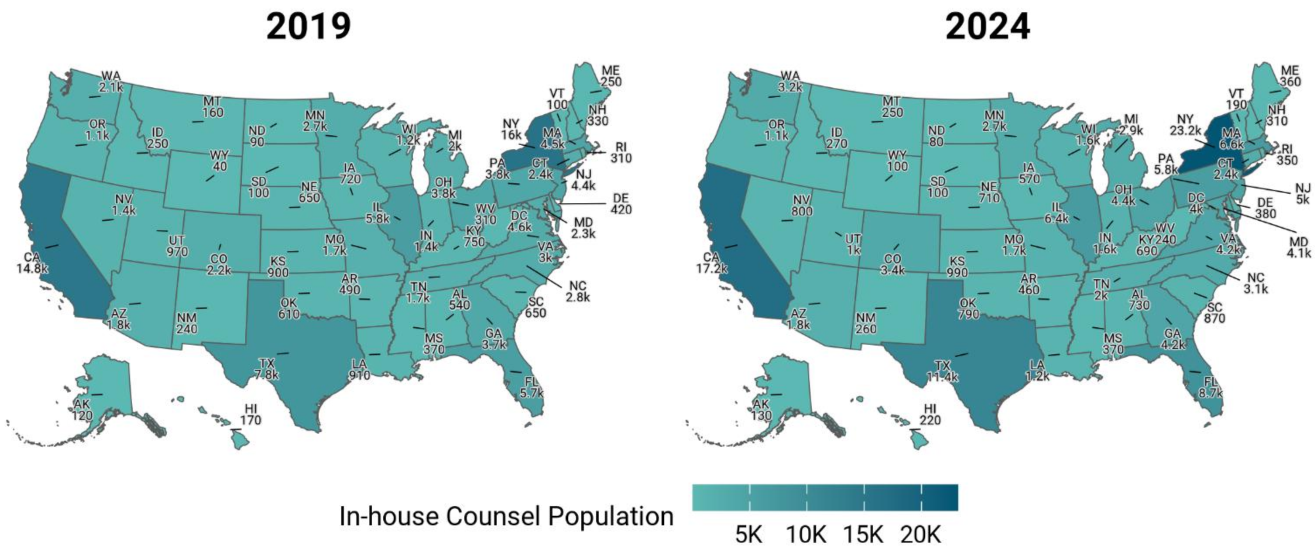
Unsurprisingly, the largest numbers of in-house counsel are concentrated in the most populated states. States like New York, California, and Texas consistently rank at the top. However, overall population is not the only factor. Economic conditions, industry concentration, and urbanization likely play a role as well.

The BLS provides state-level data starting in 2017, but for this analysis we decided to compare the six-year span ending with the most recent data (2024) and starting in 2019, the year before the Covid-19 pandemic disrupted not only job markets by making remote work the norm but also triggering interstate population movements as well. We will account for this factor in the last part of the analysis.

As shown in Figure 3, New York consistently tops the list, increasing from approximately 16,000 in-house counsel in 2019 to 23,200 in 2024. California ranked second in 2019 but, despite adding about 2,400 in-house counsel to reach 17,200 in 2024, it now trails New York by 6,000.

Texas, the second most populated state, ranks third in in-house counsel population, growing from 7,800 to 11,400 over this period. Florida has now surpassed Illinois, adding 3,000 in-house counsel to reach 8,700 in 2024, while Massachusetts added over 2,000 to reach 6,600, also surpassing Illinois' 6,400. It is worth noting that the fifth most populated state, Pennsylvania, does not make the top five despite having added around 2,000 more in-house counsel (reaching 5,800) and showing faster growth than neighboring New Jersey, which only added about 600 and recorded 5,000 in-house counsel in 2024.

Figure 3. In-house Counsel Population by US State



While national growth has been dramatic in recent years, it is not consistent across states, as figure 3 shows. Figure 4 sheds additional light on these differences by reporting the percentage change in the 2019 to 2024 period. Most states show substantial increases in in-house counsel populations, though there are a few that saw a decline in their numbers. The growth patterns fall into two main categories:

1. Low population states with dramatic percentage increases: States like Wyoming (+150%), Vermont (+90%), and Montana (+56%) had small in-house counsel populations in 2019, so even a modest numerical increase resulted in a huge percentage jump.

2. High-population states with substantial growth: States that already had significant numbers of in-house counsel in 2019 have also seen major increases, including Florida (+55%), Pennsylvania (+54%), Massachusetts (+46%), Texas (+46%), and New York (+45%). Mid-sized markets such as Maryland (+80%) and Washington (+49%) also fall into this category.

Figure 4. In-house Counsel Population Change (%) by US State, 2019-2024

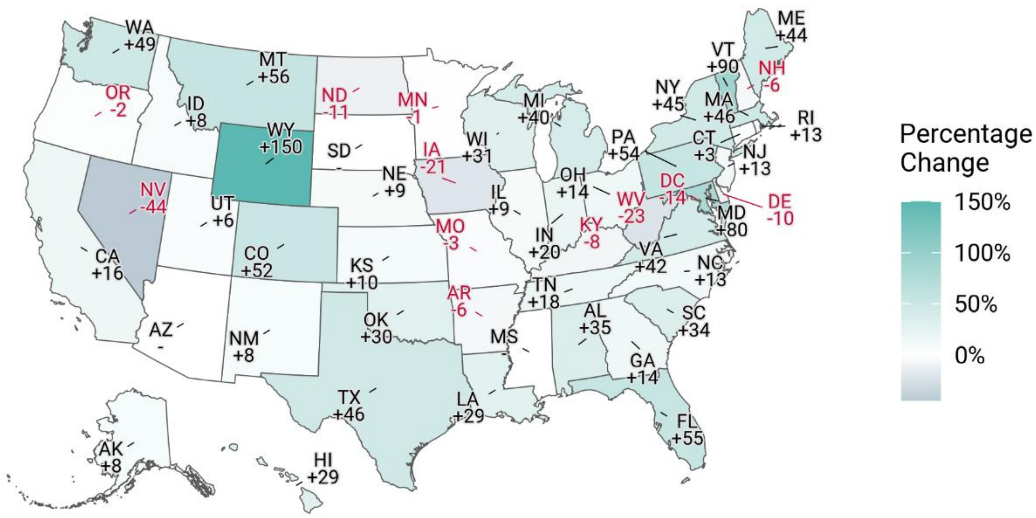
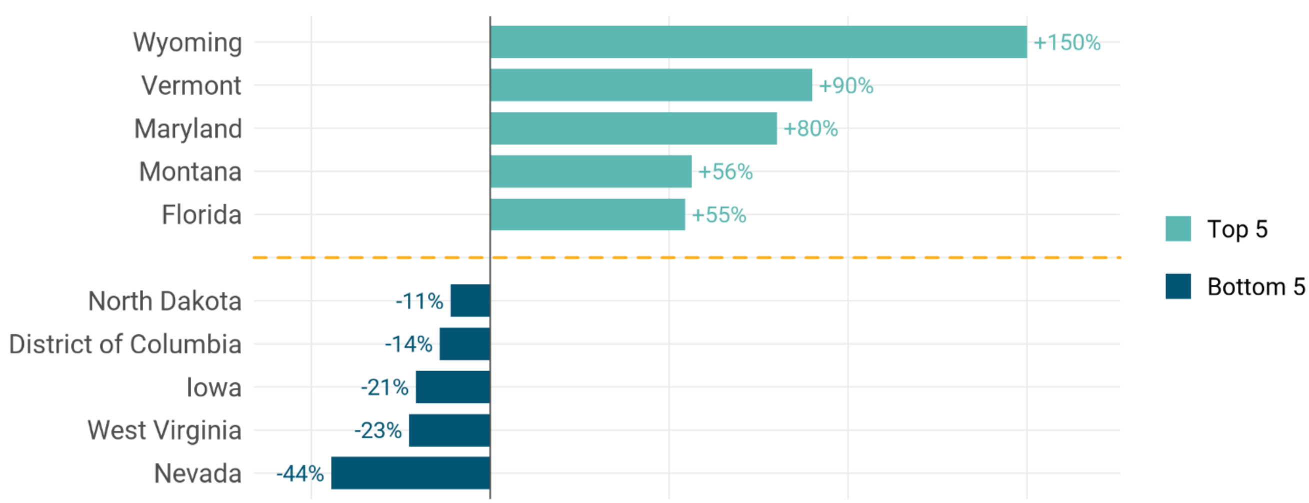


Figure 5 ranks the fastest-growing and slowest-growing in-house counsel markets, with Wyoming topping the list due to more than doubling its estimated number of in-house counsel, though with limited numbers—from just 40 in 2019 to about 100 in 2024. Vermont and Maryland almost doubled their number of in-house counsel in this six-year period, and Montana and Florida increased by more than half. Conversely, North Dakota, D.C., Iowa, West Virginia, and Nevada show double-digit declines.

Figure 5. US States with Highest and Lowest In-house Counsel Percentage Growth

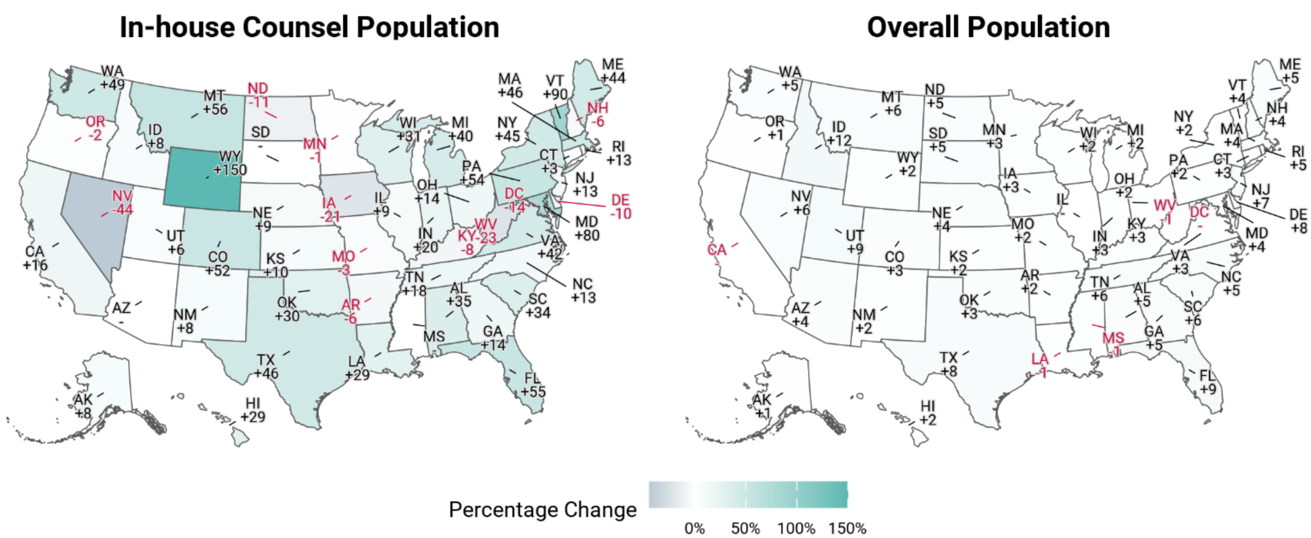
In-house Counsel Population Percentage change between 2019 and 2024.



In-house Population Shifts in a Context of Demographic Changes: Controlling by Overall Population

It may be useful to place the evolution of the in-house counsel population by state in the context of the overall shift of population with official data from the [U.S. Census Bureau](). The changes in the estimated in-house counsel population show far wider variability compared to the overall population changes, as seen in Figure 6, including several states that experienced a decline in the in-house counsel population in the 2019–2024 period whereas only five territories—California, D.C., Louisiana, Mississippi, and West Virginia—experienced overall population declines in the same period, albeit very limited (up to one percent). Because of the wide variations in state populations across the country and the relative increases in population in most states in this six-year period, we conclude our analysis by looking at the prevalence of in-house counsel in each state by standardizing this number by the state's population size.

Figure 6. In-house Counsel and Overall Population Change (%) by US State, 2019-2024

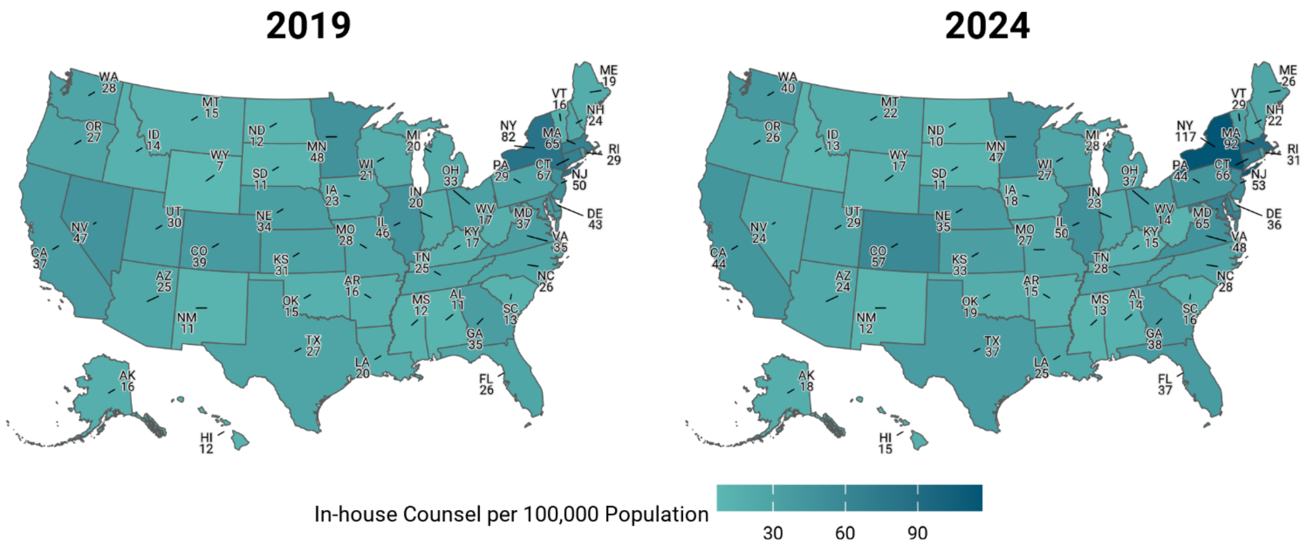


We standardize the number of in-house counsel by dividing each state's count by the state's population divided by 100,000 people. This standardization provides a simple reading of the results by recording how many in-house counsel are in each state for every 100,000 people.

Figure 7 maps this standardized metric for the years 2019 and 2024. The first noticeable aspect of the results for this metric is that Washington D.C. is in a league of its own, with 652 in-house counsel per 100,000 population in 2019, and even though this ratio fell to 562 in 2024, it is still nearly five times larger than the second on the list—New York, with 117. To keep the range of values narrower to better appreciate the differences between states, DC has been excluded from the map in Figure 7.

The highest concentration of in-house counsel is found in some Northeastern states, with New York (117), Massachusetts (92), and Connecticut (66) following D.C. at a long distance. Other Atlantic coastal states like Maryland (65) and New Jersey (53) follow suit, while Colorado has the highest concentration of in-house counsel (57) among the Western States. Standardizing by overall population results in some of the states with the highest number of in-house counsel falling down the ranking, with California (44), Florida (37), and Texas (37) returning mid-range in-house counsel ratios.

Figure 7. In-house Counsel by 100,000 Population by US State, 2019-2024

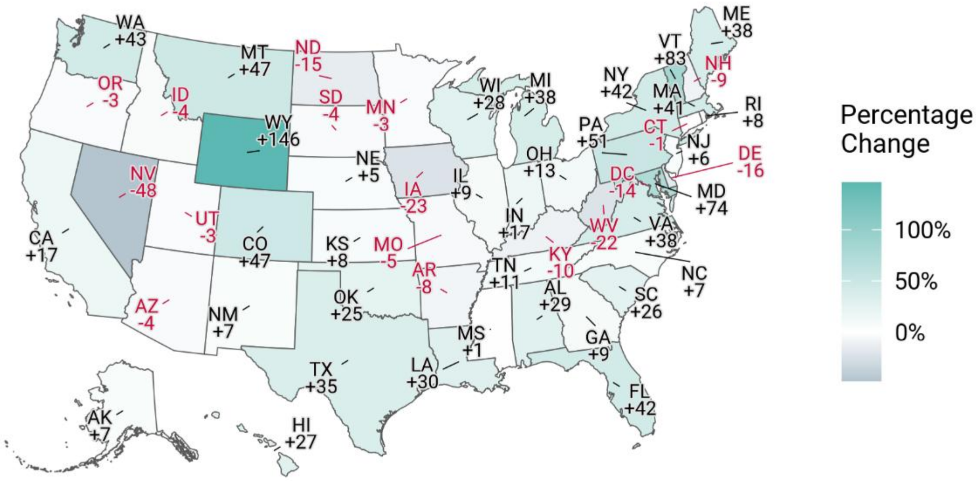


Finally, figure 8 maps the percentage change in the in-house counsel ratios between 2019 and 2024, with states with relatively low populations that have experienced a boost in their in-house counsel numbers showing a very strong increase in this standardized metric, with Wyoming (+146%) and Vermont (+83%) showing the highest jumps, closely followed by Maryland (+74%) and, at a distance, Pennsylvania (+51%).

Among the states with the highest concentration of in-house counsel, New York (+42%) and Massachusetts (+41%) show very solid gains—though this is not the case in Connecticut, another high-concentration state, which shows a one-point decrease. Florida (+42%) and Texas (+35%) show that they are growing markets for in-house counsel with increasing populations, and several states in the Midwest—Michigan (+38%), Wisconsin (+28%), Ohio (+13%), and Illinois (+9%)—also show consistent growth. Among the markets that are losing in-house population we find Nevada (-44%), Iowa (-23%), West Virginia (-22%), Delaware (-16%), North Dakota (-15%), and DC (-14%), just to name a few.

Figure 8. In-house Counsel per 100,000 Population Change (%) by US State

In-house Counsel per 100,000 Population Percentage Change between 2019 and 2024.



Conclusion

The data clearly demonstrates a powerful and consistent trend in the legal profession: the in-house counsel population is growing at a rate far exceeding that of law firms and government sectors. This growth, particularly pronounced since 2021, reflects a fundamental shift in how legal services are delivered and valued by corporations. While the overall numbers are far behind those of traditional law firms, the near doubling of the in-house population since 2008 underscores the increasing importance of internal corporate legal teams.

Geographically, this growth is not uniform. Our analysis reveals a two-tiered system of expansion: one driven by dramatic percentage increases in smaller markets and another by substantial numerical growth in established legal hubs. The significant rise in states like New York, Florida, and Texas, alongside the notable decline in others like Washington, D.C., suggests that economic and demographic shifts are playing a key role in redistributing the in-house legal workforce. This divergence points to a future where certain states may become even more dominant as corporate legal centers, while others struggle to retain or attract in-house talent. As this evolution continues, understanding these diverging market dynamics will be essential for professional associations, law firms, and legal professionals alike.