InfoGovANZ

INFORMATION GOVERNANCE INDUSTRY REPORT

May 2023

FOREWORD

Welcome to the Information Governance Industry Report 2023, which reveals the latest insights and trends for information governance predominantly within the Australian and New Zealand region.

The survey found the key drivers and priorities for information governance activities within organisations were:

• External regulatory, compliance or legal obligations;

• Good business management practices;

• Internal technology restructuring or transition; and

• Mitigating risks associated with data that can be defensibly deleted.

While most of these drivers have remained consistent in previous survey results, the elevation of 'mitigating risks associated with data that can be defensibly deleted' as a key priority for organisations is unsurprising given the Optus and Medibank data breaches in the latter part of 2022 and the more recent Latitude data breach, which have highlighted the risks of over-retention of personal information.

Two new questions were added to the survey to gain insight into the impact of these data breaches on organisations more widely. While only 20% of respondents indicating a major impact to their organisation's IG activities, more than half of respondents' organisations had either implemented changes or formed the intention to make changes to information lifecycle management policies and procedures in the last 12 months. This demonstrates a broader recognition by organisations that they need to ensure they have adequate information lifecycle management in place, including disposal of personal information that is no longer required.

Interestingly, the survey results revealed that a quarter of all IG projects either underway or planned to be underway in the next year were driven largely by changes, or foreshadowed changes, to privacy laws with a further quarter being 'somewhat' driven by changes or foreshadowed changes to privacy laws.

In light of the recent high-profile spate of data breaches and foreshadowed changes to Australia's *Privacy Act 1988* (Cth), it is unsurprising to see a significant increase in IG projects planned across the next 12 months from 74% in 2021 to 82% in 2023. Over a third of respondents indicated their organisations are expecting to increase their IG spend this financial year.

It is pleasing to see that organisations are increasingly governing with a formal IG framework. The number of respondents reporting that their organisation is doing so has increased from 51% in 2019 to 64% in 2021 and then 71% in 2023. In another positive sign, nearly two-thirds of respondents rated the IG maturity of their organisation as intermediate or advanced.

More respondents considered their organisation to have a proactive stance (50%) than a reactive one (40%), although clearly there is significant room for improvement here. Our third new question asked respondents their opinion as to whether the board and/or leadership team of their organisation had sufficient understanding of IG. Concerningly, only one-third of respondents believed this was the case.

As recent high-profile data breaches have shown, boards and governing authorities of organisations need to have in place robust information governance to reduce information risks across the enterprise. Boards need to ensure they are actively monitoring the governance of data and information lifecycle – from collection to use and disposal – to comply with privacy regulations and reduce overall risks, including reputational and legal risks and costs to the organisation.

A very big thank you to the 297 participants who responded to the survey and provided comments. Thank you also to the National Archives of Australia and the Government Agencies Information Network (GAIN), Information and Privacy Commission NSW, Australian Society of Archivists, EDRM, RIMPA, DAMA Australia and ALSM for distributing this survey.

I would particularly like to thank Dr Peter Chapman, Partner, KordaMentha and InfoGovANZ International Council member, for his detailed work in analysing the statistics and assisting in the preparation of this report.

We hope you find the information relevant and helpful to you and your organisation.

Susan Bennett, Founder & Executive Director
InfoGovANZ
May 2023

RESPONDENT INSIGHTS

LOCATION

AUSTRALIA	82%
NEW ZEALAND	7%
REST OF THE WORLD	11%

SIZE OF ORGANISATION

1–100	11%
101–500	24%
501–1,000	11%
1,001–5,000	28%
5,001–10,000	13%
10,000+	13%

ORGANISATIONAL SECTOR

GOVERNMENT	55%
CORPORATION	15%
UNIVERSITY	11%
PROFESSIONAL SERVICES	8%
NOT-FOR-PROFITS	5%
SOFTWARE/SERVICES VENDOR	3%
OTHER	3%

ROLE IN INFORMATION GOVERNANCE

PRACTITIONERS (DIRECT)	48%
IG RELATED DISCIPLINE	20%
PRACTITIONERS (INDIRECT)	14%
OTHER/UNSPECIFIED	8%
SALES	6%
RESEARCH	4%

AREAS OF ENGAGEMENT

RECORDS MANAGEMENT	64%	CYBERSECURITY/IT SECURITY	31%
DATA GOVERNANCE	60%	DATA ANALYTICS	28%
PRIVACY	56%	EDISCOVERY	23%
RISK/COMPLIANCE	47%	LEGAL	22%

INFORMATION GOVERNANCE DEFINITION

Our previous survey found broad support to update the definition of Information Governance to include the concepts of people and culture. We proposed a potential updated definition as:

"The policies, procedures, technologies and culture that organisations build to maximise the value of information while minimising associated risks and costs."

In your opinion, is this an appropriate definition of Information Governance?

YES 73%   PARTIALLY 24%   NO 3%

Overall, nearly three-quarters of respondents agreed or partially agreed with an updated definition of information governance.

Some strong agreement and disagreement in the comments:

YES:

- *A strongly valued IG organisational culture and practice especially at the senior leadership leader is the pivotal factor in doing any IG effectively in an organisation. IG is led by people not technology.*

NO:

- *The definition should explicitly include decision rights. Governance is about how decisions are made.*

- *If Information Governance covers everything then it covers nothing, I think it should be more focused on the policies and procedures.*

PARTIAL:

- *I'd add language that reflects the decision rights that IG creates for employees as well as IG's ability to influence the ability of an organization to achieve their goals.*

- *The language - 'building' 'maximise' 'minimise' is very government and will hamper adoption into mainstream. How about Plain English version? For example "actions and processes to improve and protect valuable information" or something?*

- *I think infosec could fall through the gaps of the above definition. I think information protection should be implied in any information governance definition.*

- *I believe it needs to specifically include people, or their roles, i.e. policy, procedure/process, technology, roles and culture.*

- *Helpful to refer to the new ISO Standard (ISO 24143:2022) and/or Gartner's definition. I think being consistent and not offering too many variations is better for audiences struggling to grasp the concept.*

- *Recommend including people and stating technology last. "The policies, procedures, people, culture, and technologies that organisations require to realise the value of information. while minimising associated risks and costs."*

- *I think the world culture should be more possessive, i.e. organisational culture. Value of information is very speculative, i.e. context vs aggregation, as such I think risk should be the primary concern without reference to costs.*

INFORMATION GOVERNANCE FRAMEWORK

## Do you view IG as an umbrella concept that describes all information management activities?

87% of respondents in this survey agreed with this statement, showing a large uptick from results in 2021 (76%), 2019 (75%) and 2017 (74%).

13%

2023

87%

- Yes
- No
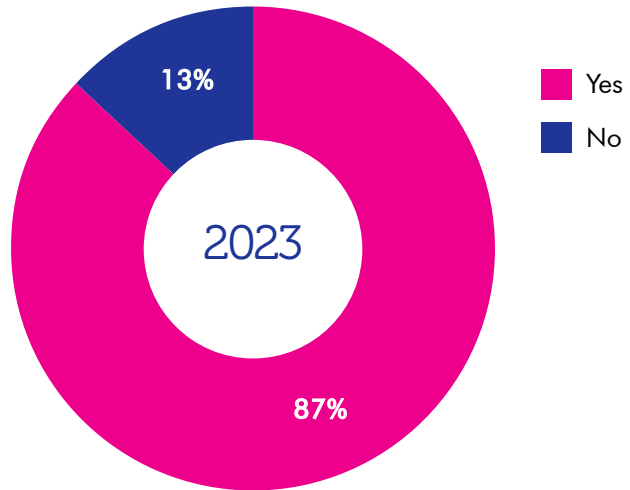
Does your organisation govern IG with a formal IG framework with policies and procedures?

Agreement with this statement saw a further positive trend against 64% of organisations in 2021, 51% in 2019 and 55% in 2017.

The increase in 2023 appears to be driven by corporate responses, which saw a 23% increase in positive response over 2021.

5%

24%
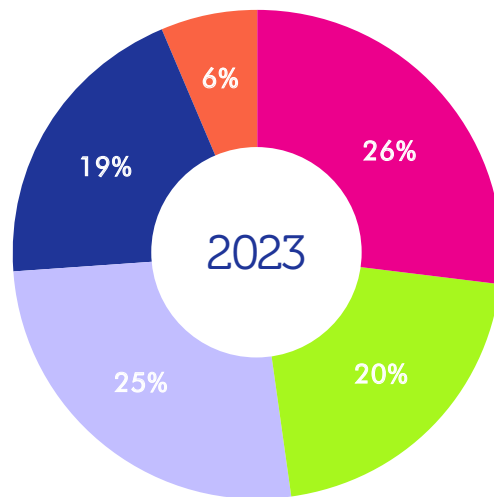
2023

71%

- Yes
- No
- Don't know
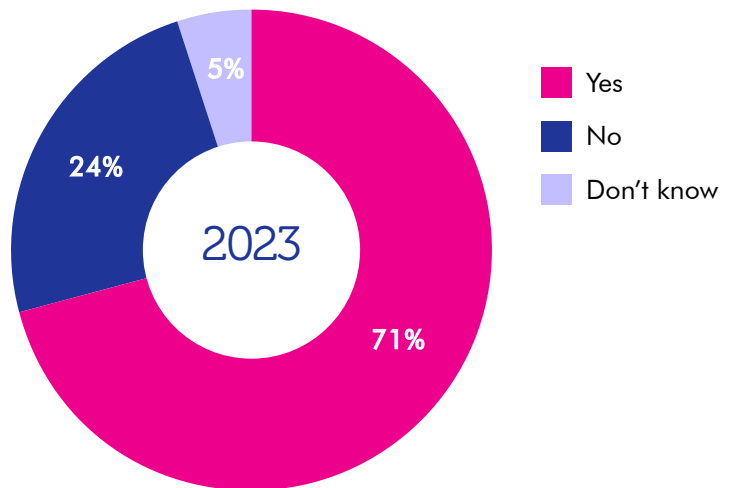
INFORMATION GOVERNANCE DRIVERS

If your organisation has IG Projects underway or planned in the next year, to what extent have these projects been driven by changes or foreshadowed changes in privacy laws?

Half of the survey respondents indicated that regulatory activity around privacy was 50% or more of the reason behind their recent IG project planning. This is a substantial increase from 2021 where only 31% or respondents rated privacy laws as the primary reason for their IG project activity.

■ Not at all driven

■ Slightly driven

■ Somewhat driven

■ Largely driven

■ Totally driven

2023

- 26% Not at all driven
- 20% Largely driven
- 25% Somewhat driven
- 19% Slightly driven
- 6% Totally driven

To what extent have the occurrence of high-profile data breaches (e.g. Optus, Medibank, Lastpass) in the last 12 months impacted the IG activities of your organisation?
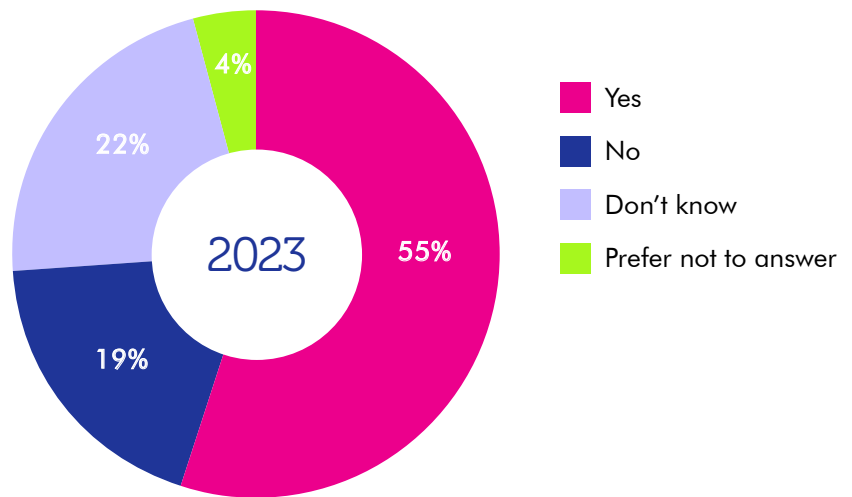
This was a new question in our 2023 survey. Overall, the impact was assessed mostly as 'minor' (65%) with only 20% of respondents indicating a major impact. Our survey responses indicated that larger organisations were more reactive to these high profile data breaches than smaller ones.

■ Major impact

■ Minor impact

■ No impact at all

2023

- 21% Major impact
- 57% Minor impact
- 22% No impact at all
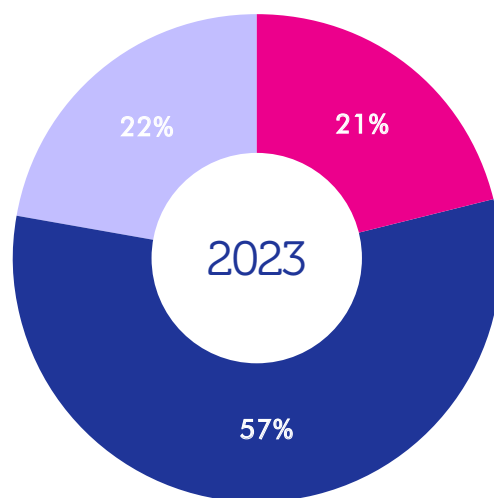
INFORMATION GOVERNANCE DRIVERS

Has your organisation implemented changes, or formed the intention to make changes, to Information Lifecycle Management (ILM) policies and/or procedures in the last 12 months?

2023

- Yes — 55%
- No — 19%
- Don't know — 22%
- Prefer not to answer — 4%

This was a new question for the 2023 survey and 55% of respondents answered that they have or will be making changes to Information Lifecycle Management. This indicates a broad recognition that organisations need to ensure they have adequate information lifecycle management in place, including disposal of data and personal information that is no longer needed for the purpose for which it was collected and is not otherwise required to be kept to comply with record-keeping obligations under other legislation.


InfoGovANZ IG Model

- Cybersecurity & Information Security
- Automation & Artificial Intelligence
- Data Analytics & Infonomics
- Business Intelligence
- Legal, Discovery & Investigations
- Privacy & Ethics
- IG
- Data Governance
- Technology Integration
- Risk & Compliance
- Records Management
- Information Lifecycle Management
- Archiving & Long-term Preservation
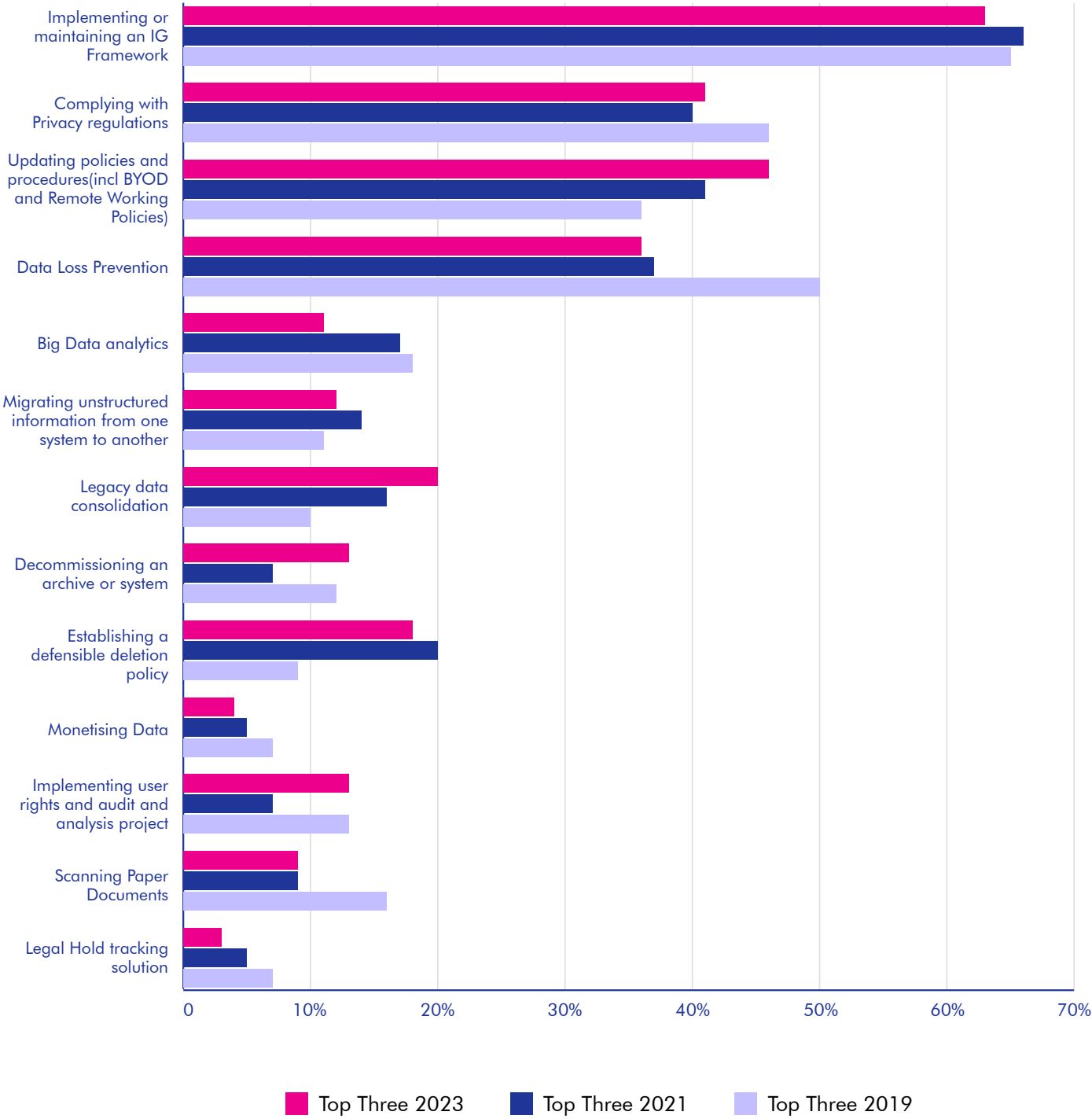
INFORMATION GOVERNANCE PRIORITIES

We asked participants to rank up to 5 priority IG activities in order of importance for your organisation.

The 2023 survey identified that the main priorities are – Implementing or maintaining an IG Framework, Compliance with Privacy regulations, Updating of policies and procedures and Data Loss Prevention. There seems to be an increasing trend in the importance of legacy data consolidation over the past three surveys.

Legend: ■ Most Important 2023 ■ Top Three 2023
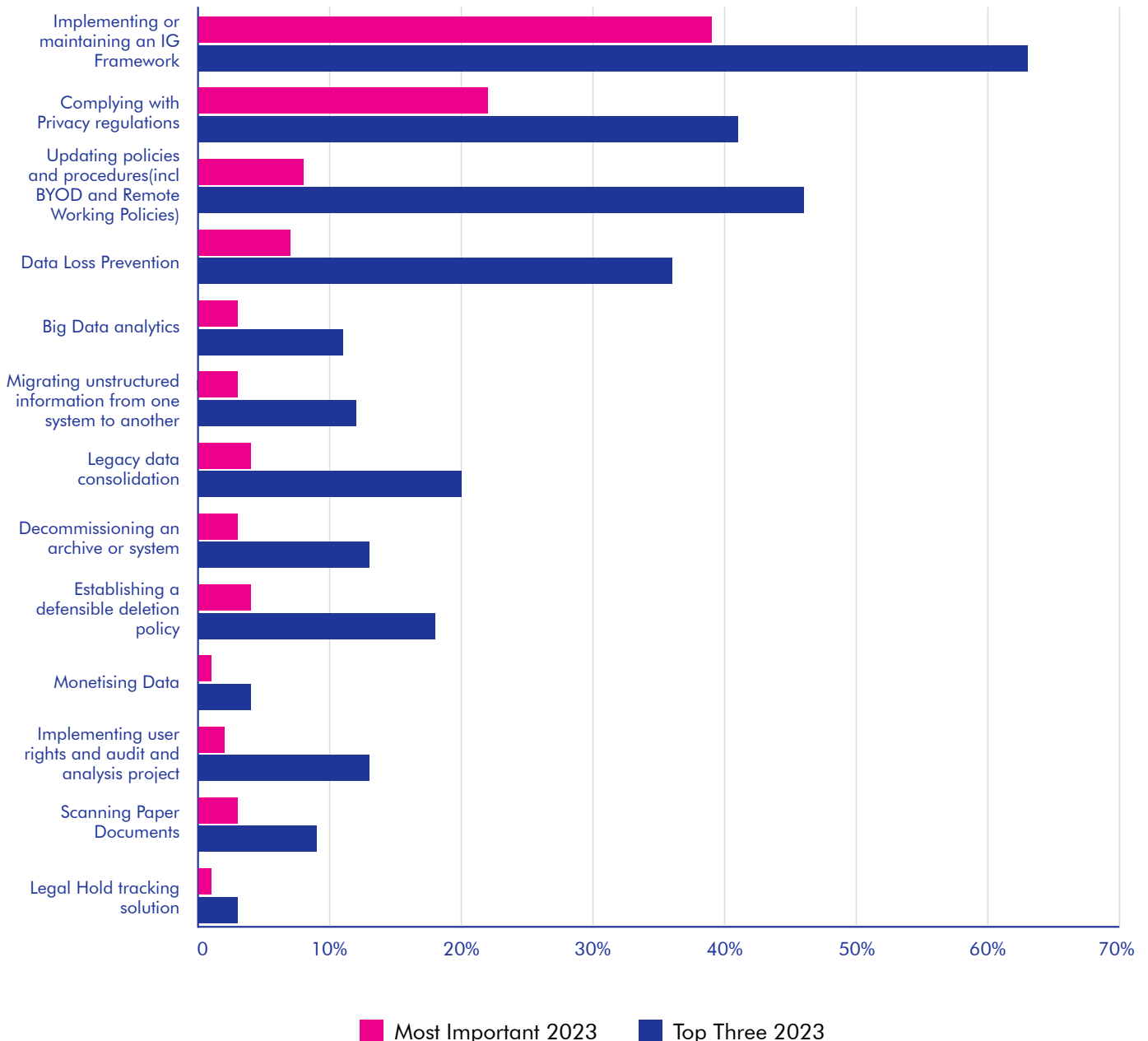
INFORMATION GOVERNANCE PRIORITIES

While there are similar top priorities for organisations as observed in our prior surveys, there is an emerging trend in the desire to better handle legacy data within organisations. This trend is possibly related to increase in privacy and IT security related projects that appear to be driven by increased government regulatory attention on data breaches and over-retention of sensitive data.
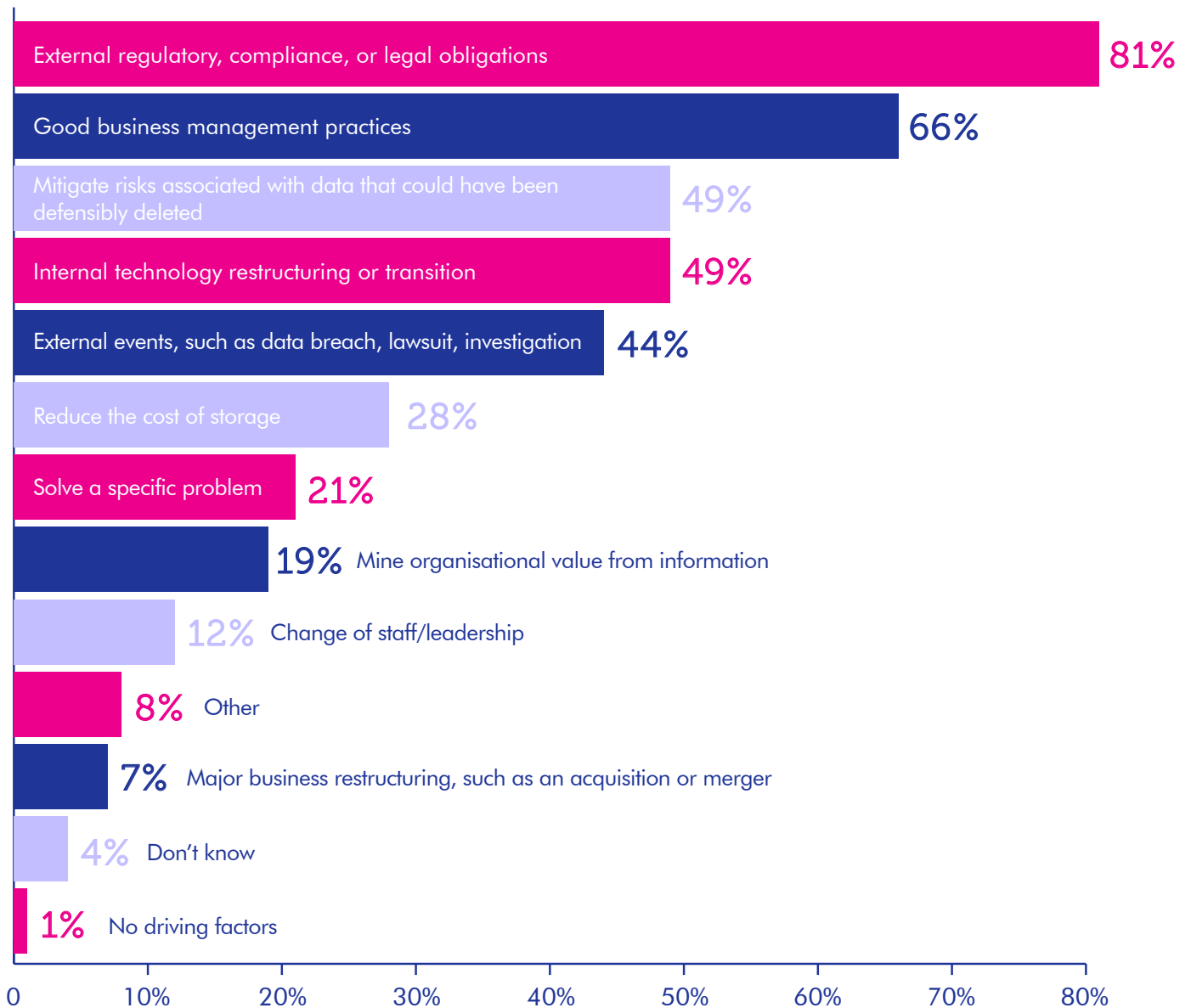

Legend: Top Three 2023, Top Three 2021, Top Three 2019

INFORMATION GOVERNANCE DRIVERS

What are the main driving factors for IG projects in your organisation?

The three main drivers continue to be – External regulatory, compliance or legal obligations, Good business management practices, and Internal technology restructuring or transition. Tied in equal third place, mitigating risks associated with data that can be defensibly deleted, that is data no longer required to be retained, is now a key driver of IG projects.
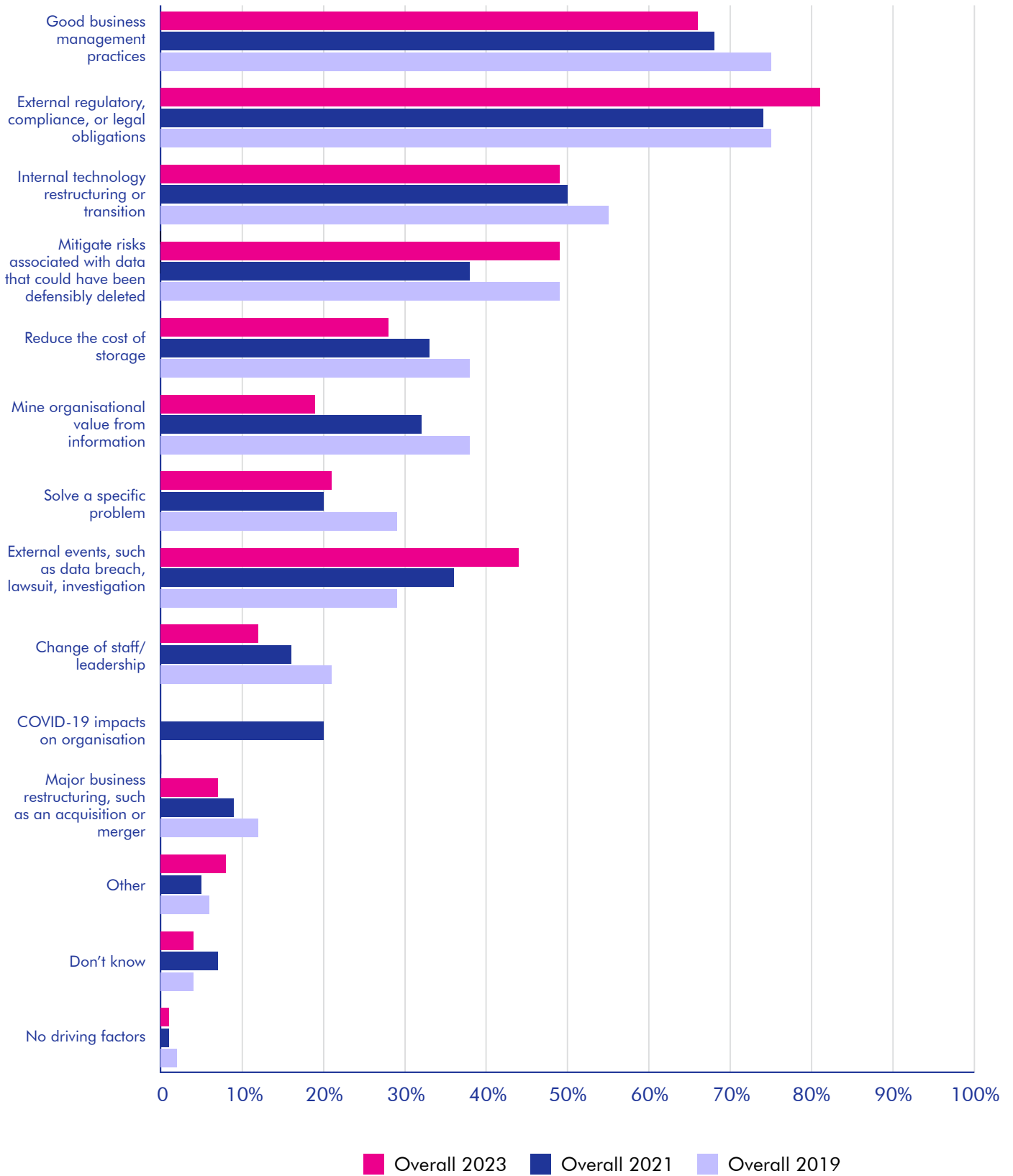
External events, such as data breach, lawsuit, investigation as a driver has increased yet again showing an upward trend from 2019 (29%, 36%, 44%). Likewise external regulatory, compliance and legal obligations have also increased as a driver of IG projects. These results demonstrate a clear trend relating to the concerns that organisations have around cyber-security and the potential impact a data breach may have on their organisation.

Organisational restructures, leadership changes and mining value from data are all reduced from last survey, indicating a level of stability in organisational structures between 2021 and 2023.
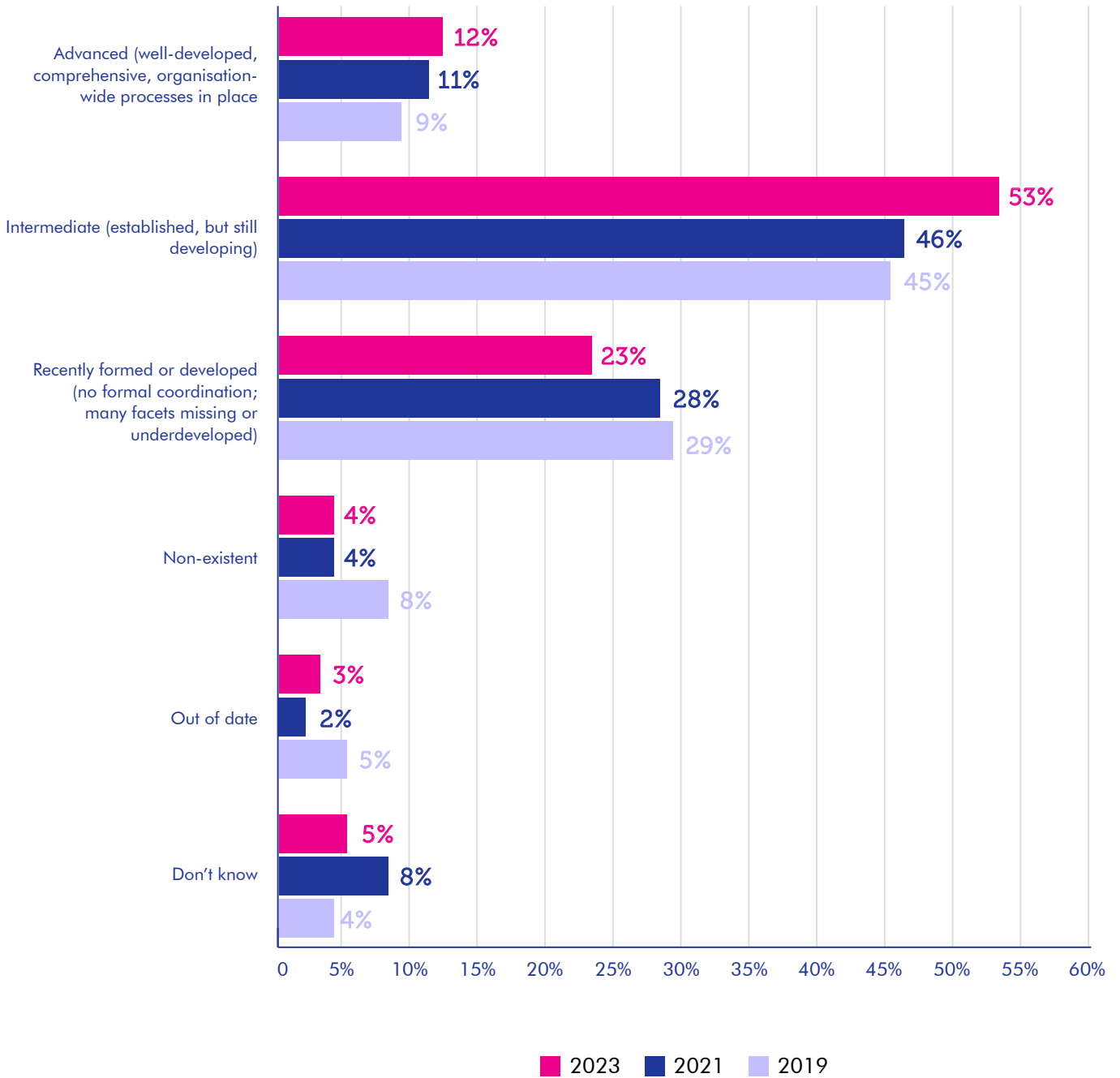
Driver	Percentage
External regulatory, compliance, or legal obligations	81%
Good business management practices	66%
Mitigate risks associated with data that could have been defensibly deleted	49%
Internal technology restructuring or transition	49%
External events, such as data breach, lawsuit, investigation	44%
Reduce the cost of storage	28%
Solve a specific problem	21%
Mine organisational value from information	19%
Change of staff/leadership	12%
Other	8%
Major business restructuring, such as an acquisition or merger	7%
Don't know	4%
No driving factors	1%

INFORMATION GOVERNANCE DRIVERS

Driving Factors for IG Projects - Full Sample

Legend: Overall 2023 · Overall 2021 · Overall 2019

INFORMATION GOVERNANCE DRIVERS

How would you rate the maturity of your organisation's overall IG program?
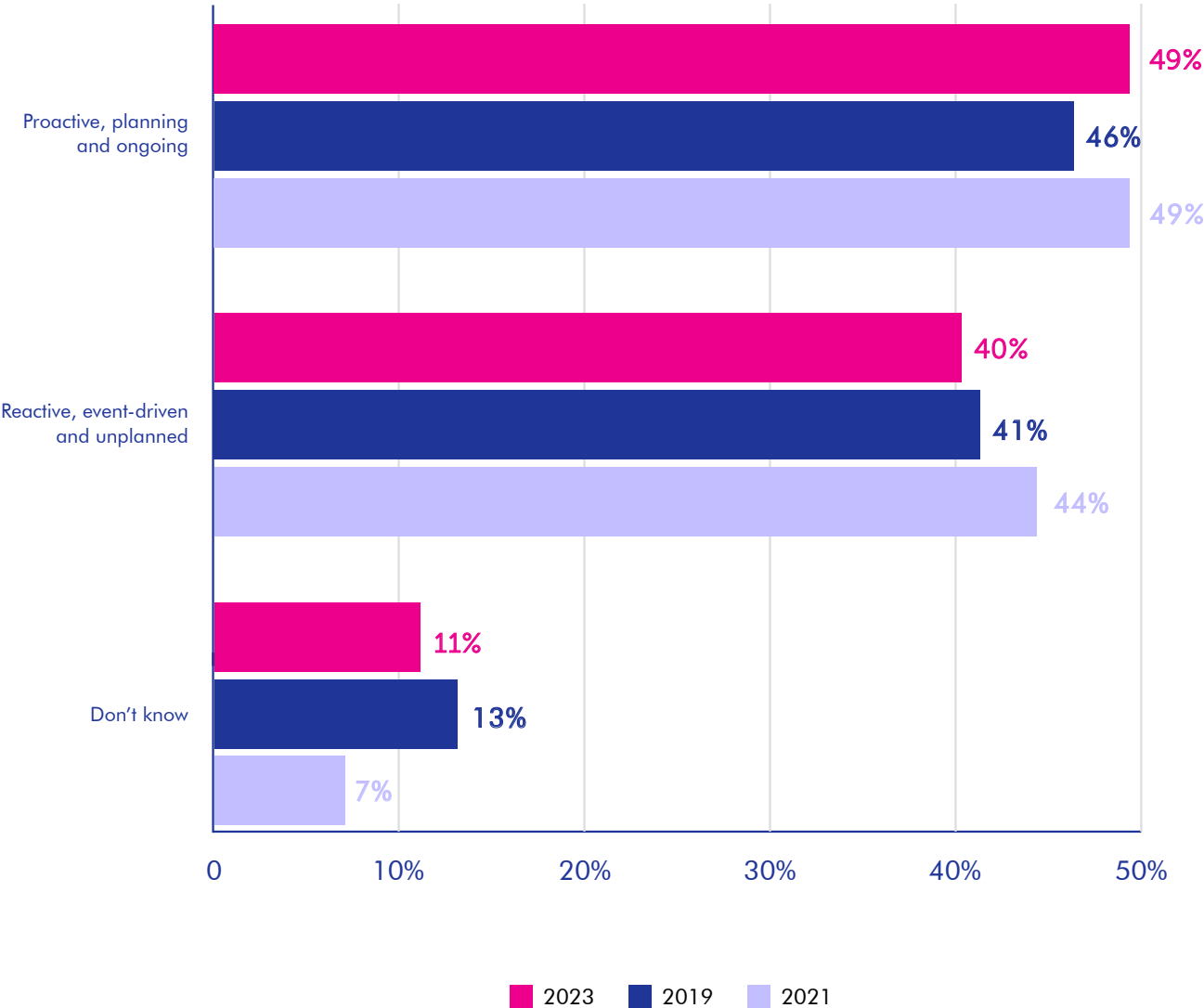
IG programs in organisations continue to mature with 65% of organisations in 2023 indicating their IG program is advanced or intermediate. This compares with 57% in 2021, 54% in 2019 and 47% in 2017, which shows an encouraging trend of IG maturity with participants' organisations over time.

Advanced (well-developed, comprehensive, organisation-wide processes in place
- 2023: 12%
- 2021: 11%
- 2019: 9%

Intermediate (established, but still developing)
- 2023: 53%
- 2021: 46%
- 2019: 45%

Recently formed or developed (no formal coordination; many facets missing or underdeveloped)
- 2023: 23%
- 2021: 28%
- 2019: 29%

Non-existent
- 2023: 4%
- 2021: 4%
- 2019: 8%

Out of date
- 2023: 3%
- 2021: 2%
- 2019: 5%

Don't know
- 2023: 5%
- 2021: 8%
- 2019: 4%

Legend: 2023 | 2021 | 2019

INFORMATION GOVERNANCE DRIVERS

## How do you view your organisation's IG programs?

Nearly 50% of respondents viewed their organisations as having proactive, planned and ongoing IG programs and 40% of respondents' organisations as having reactive, event-driven and unplanned. As the bar chart below shows, the results have been largely consistent for the previous three surveys.

Proactive, planning and ongoing	49% (2023), 46% (2019), 49% (2021)
Reactive, event-driven and unplanned	40% (2023), 41% (2019), 44% (2021)
Don't know	11% (2023), 13% (2019), 7% (2021)

Legend: ■ 2023 ■ 2019 ■ 2021

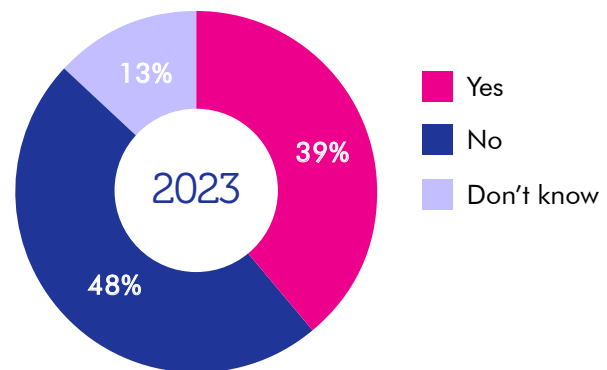# INFORMATION GOVERNANCE LEADERSHIP

Does your organisation have an established role for IG leadership?

While there was a small increase from 55% in 2021 to 58% in 2023 there was a small decrease from 36% to 32%, indicating a slow progress for established roles for IG leadership within organisations.

2023

- 10% Don't know
- 32% No
- 58% Yes

Legend:
- Yes
- No
- Don't know
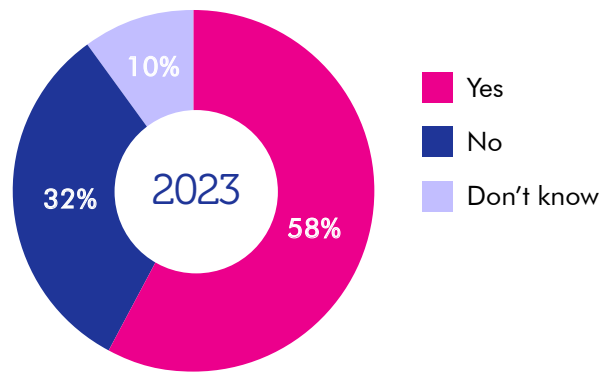
Does your organisation have a multi-disciplinary IG steering committee?

Overall results roughly aligned with our previous surveys conducted over the last 6 years. It is interesting to note that organisations with multi-disciplinary IG steering committees remain in the minority despite this being a recognised element of IG best practice.

2023

- 13% Don't know
- 39% Yes
- 48% No

Legend:
- Yes
- No
- Don't know

Is 'information governance' or 'data governance' in the job title of the individual with overall accountability for IG in your organisation?

Overall the results, showed a slight decline from 33% in 2021 to 29% in 2023. However, this result still shows an improvement over the 2019 result of 20%.

2023

- 29% IG/DG/Both
- 71% No

Legend:
- IG/DG/Both
- No
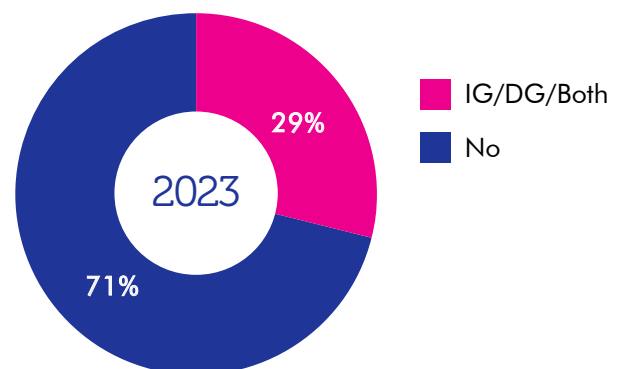
INFORMATION GOVERNANCE LEADERSHIP

In your opinion, does the board and/or leadership team of your organisation have sufficient understanding of IG?

This was a new question in our 2023 survey. Concerningly, in the participants' views, only one-third of respondents indicated that their board/leadership team had sufficient understanding of IG.

2023

- 8%
- 17%
- 34%
- 41%

Legend:
- Yes
- No
- Don't know
- Prefer not to answer
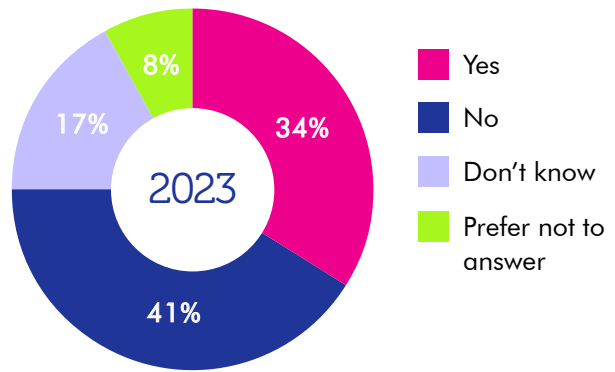
Is the individual accountable for IG in your organisation a peer of the C-Suite (senior executives)?

While we had seen a consistent increase in the percentage of respondents indicating their accountable person is a peer of the C-suite since 2017, there was a slight decline to 43% in 2023 from 47% in 2021.

2023

- 21%
- 43%
- 36%

Legend:
- Yes
- No
- Don't know
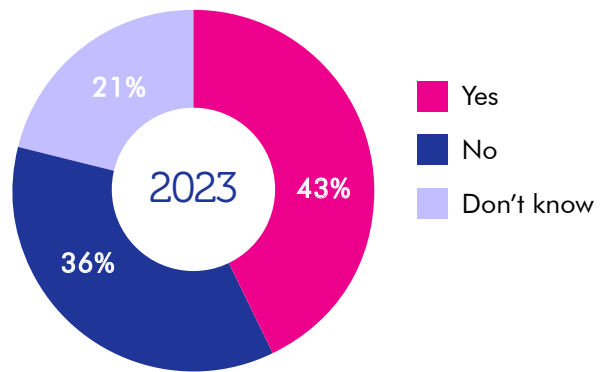
Does your organisation have IG projects underway or planned in the next year?

Once again the survey results demonstrated a substantial increase in our respondents plans to undertake IG projects in the next 12 months, increasing to 82% from 2021's result of 74% and 2019's 73%.

2023

- 15%
- 3%
- 82%

Legend:
- Yes
- No
- Don't know/ Prefer not to say
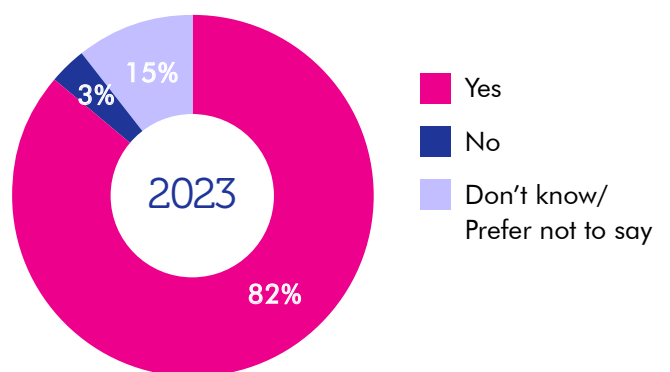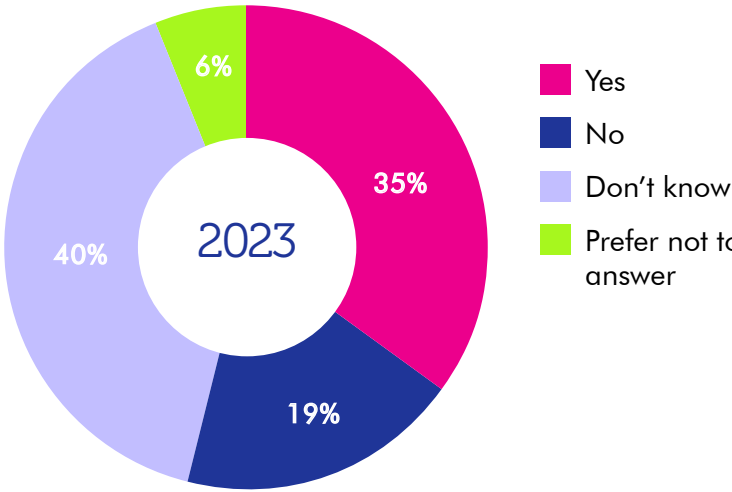
INFORMATION GOVERNANCE PROJECTS

In the last 12 months, what is the average number of IG projects your organisation is working on?

The majority of organisations are working on between one and six IG projects within the last 12 months. The results are largely consistent with the 2021 results, including the high number of respondents not knowing how many IG projects were being undertaken. This may highlight the lack of a central IG program of activities and overall monitoring.

2023

- 7%
- 6%
- 24%
- 34%
- 29%

Legend:
- 10 or more
- 7 to 9
- 4 to 6
- 1 to 3
- Don't know
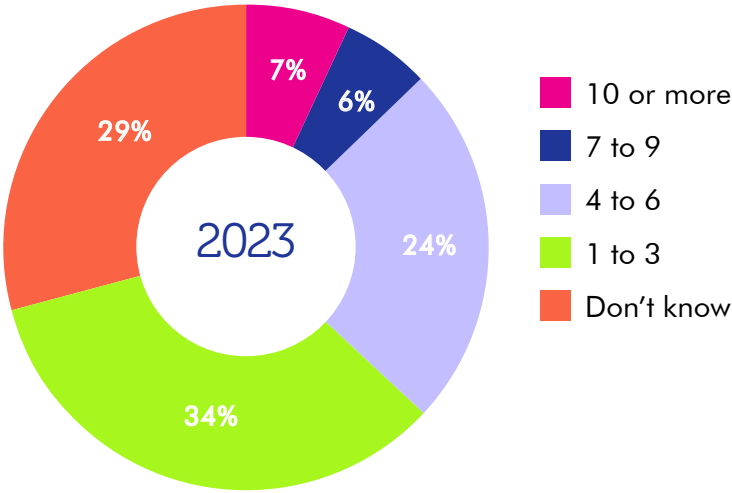
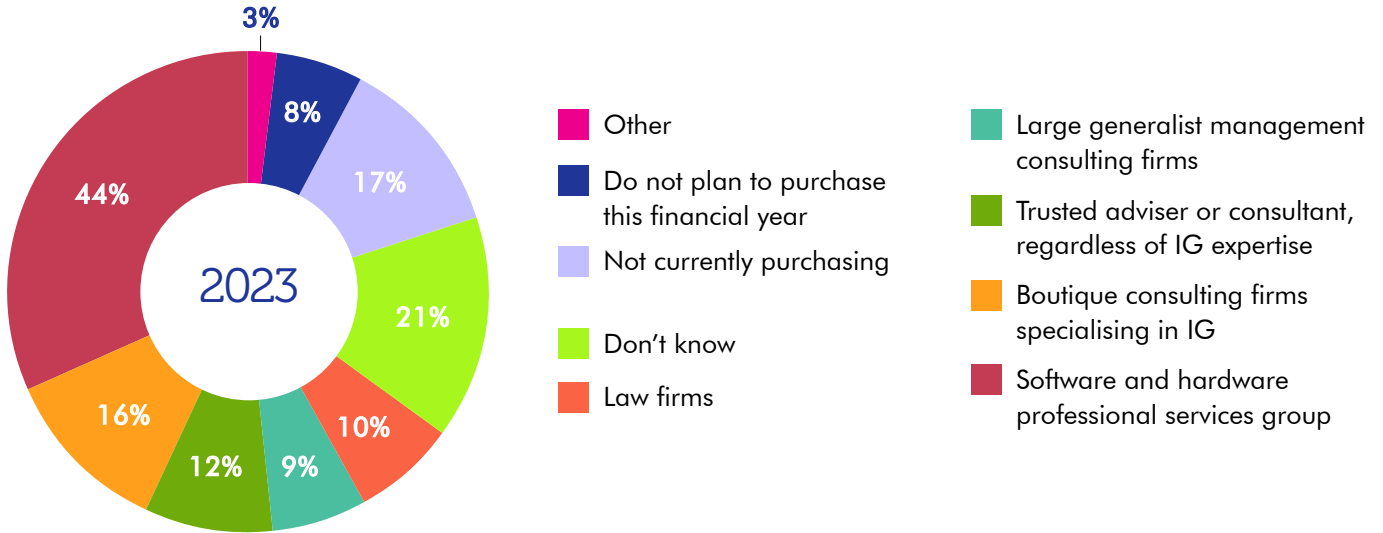## Does your organisation expect to increase IG spend this financial year?

35% of organisations are expecting to increase their IG spend, which is largely consistent with the 2021 result, maintaining the increasing level of spending compared with the 2019 and 2017 surveys.
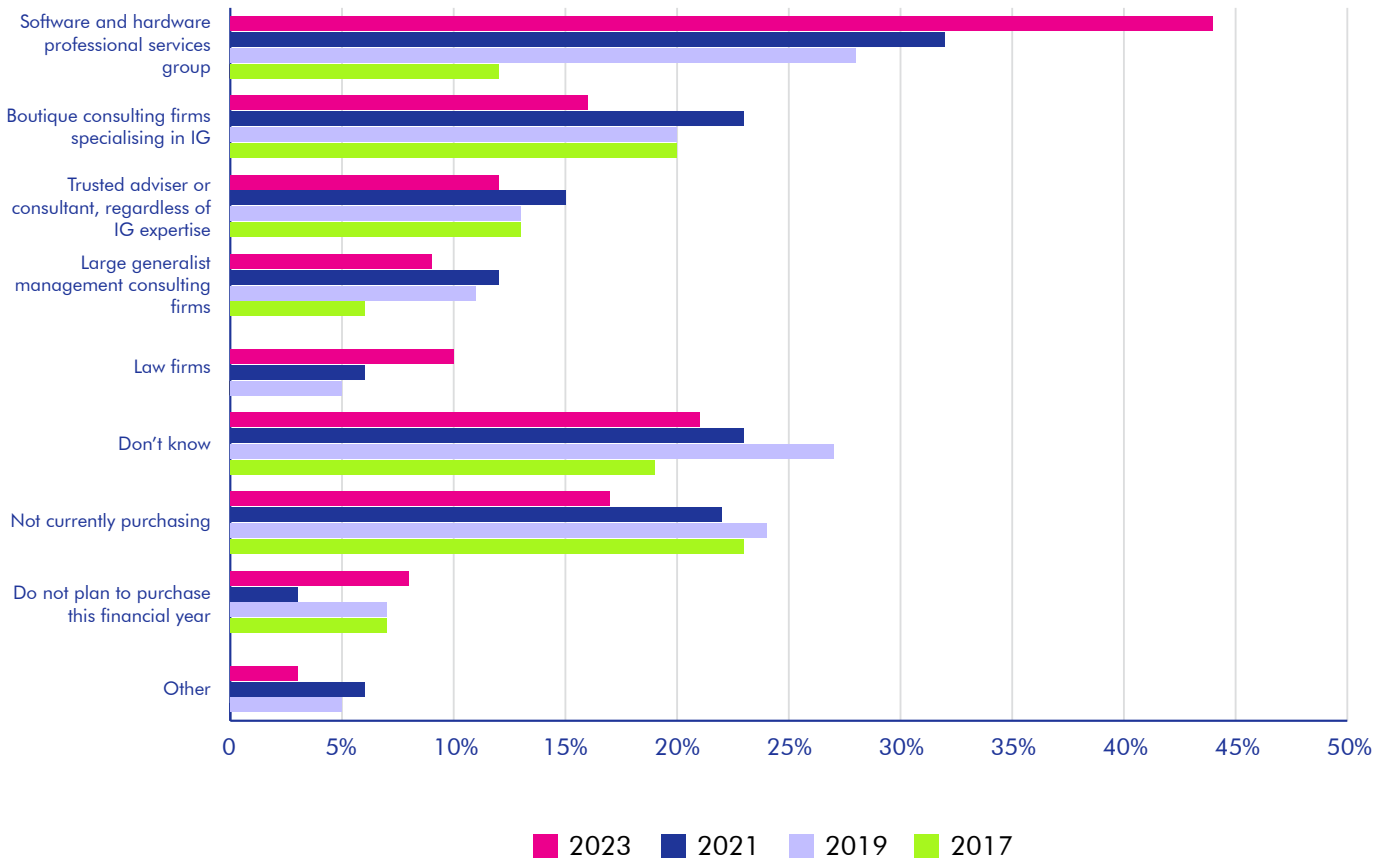
2023

- 6%
- 35%
- 19%
- 40%

Legend:
- Yes
- No
- Don't know
- Prefer not to answer

INFORMATION GOVERNANCE SERVICES

Where does your organisation purchase IG Services?

There appears to be a decrease in a number of areas, although intention to purchase from law firms and software and hardware suppliers seems to be increasing.

2023

- **Other** — 3%
- **Do not plan to purchase this financial year** — 8%
- **Not currently purchasing** — 17%
- **Don't know** — 21%
- **Law firms** — 10%
- **Large generalist management consulting firms** — 9%
- **Trusted adviser or consultant, regardless of IG expertise** — 12%
- **Boutique consulting firms specialising in IG** — 16%
- **Software and hardware professional services group** — 44%

It is interesting to note that the intention to purchase IG services from software and hardware professional groups has grown strongly in each survey we have issued, demonstrating the evident weight that our respondents place on technological solutions for information governance. While there was an increase in respondents not intending on purchasing services this year, an increase in the number of respondents seeking assistance from law firms is likely reflecting the concerns around privacy.

Legend: 2023, 2021, 2019, 2017

INFORMATION GOVERNANCE SERVICES

Do you feel you have appropriate training and knowledge to contribute effectively to IG activities in your organisation?

There has been a substantial increase from 57% in 2021 to 72% in 2023 in respondents reporting they do have appropriate training and knowledge to effectively contribute to IG activities within their organisation. This is a pleasing result, demonstrating an increased confidence in our survey respondents that they are prepared for impending information governance challenges.

2023

- 11% Don't know
- 17% No
- 72% Yes

Legend:
- Yes
- No
- Don't know
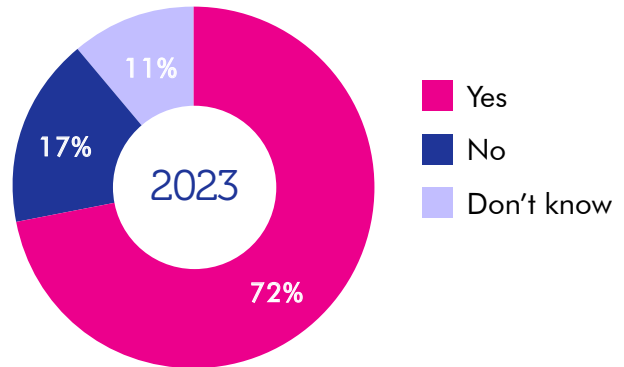
Is there any area of IG you want to learn more about in 2023?

While the respondents to our survey generally showed an increased confidence in their training and preparation to face IG challenges, there was plenty of recognition that with technology constantly evolving training and development is an ongoing requirement.

Some of the common themes emerging from the comments included:

- Cyber-security and risk management – undoubtedly front of mind for those keeping an eye on the recent data breaches making headlines on a regular basis.

- Artificial Intelligence and emerging technologies – a quick glance at news and social media will reflect the impact of ChatGPT and other generative AI platforms on our collective conscious. These tools will bring benefits and increase risk for organisations in novel ways, and our survey respondents see a clear need to stay on top of this revolution.

- Privacy regulations and IG frameworks – an ongoing theme in our survey results has been the desire to stay on top of changes to the legislative changes around privacy (nationally and internationally) as well as seeking clarity around best practice for IG framework implementation and use.

RISK LEGISLATION DATA INFORMATION FRAMEWORKS IMPLEMENTATION ORGANISATION STORAGE MODERN SECURITY PRIVACY GOVERNANCE SOVEREIGNTY ANALYTICS ETHICS

InfoGovANZ

We thank our sponsors, affiliates, supporters and the survey participants for supporting and participating in the InfoGovANZ IG Industry Report 2023.

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InfoGovANZ is a community of international professionals across the data and information sphere - Information Governance, Legal, Data Privacy, AI and Ethics, Cyber and Information Security, Records Management, FOI, eDiscovery, Data and Infonomics, Risk and Compliance - with a multi-disciplinary focus to collaborate and share best practices and promote global information governance innovation.

Visit our website for more information — www.infogovanz.com