

2023 Annual Health-ISAC Member Satisfaction Survey Results

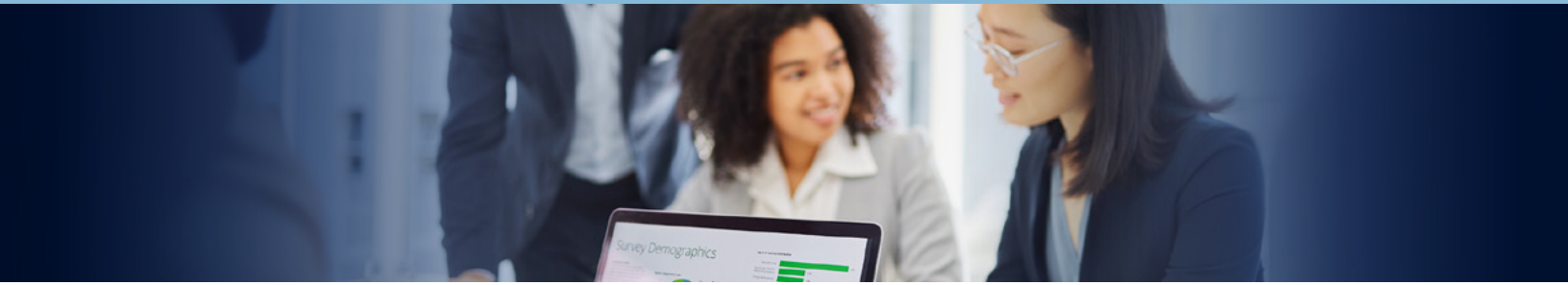
TLP:WHITE This report may be shared without restriction. For Health-ISAC members—be sure to download the full version of the report from the Health-ISAC Threat Intelligence Portal (HTIP). Contact Membership Services for assistance.





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Background

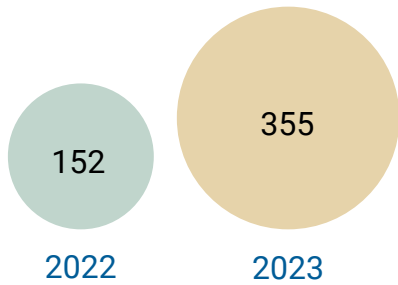


The Second Annual Health-ISAC Member Satisfaction Survey was conducted from May 1 – May 31, 2023.

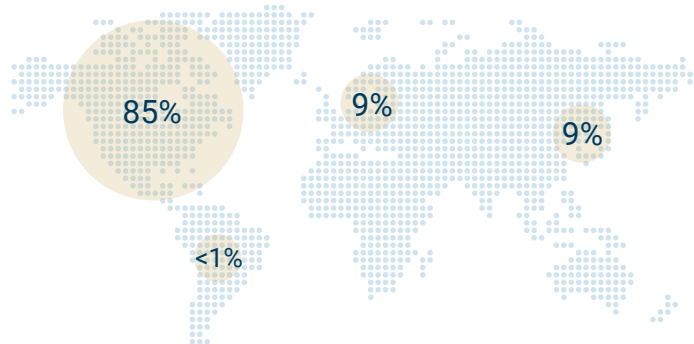
Demographics

Increased Response: The survey received an outstanding 351 responses, demonstrating a substantial growth from the previous year’s 152 responses. This represents engagement from 28% of Member organizations, compared to 18% in the previous year.

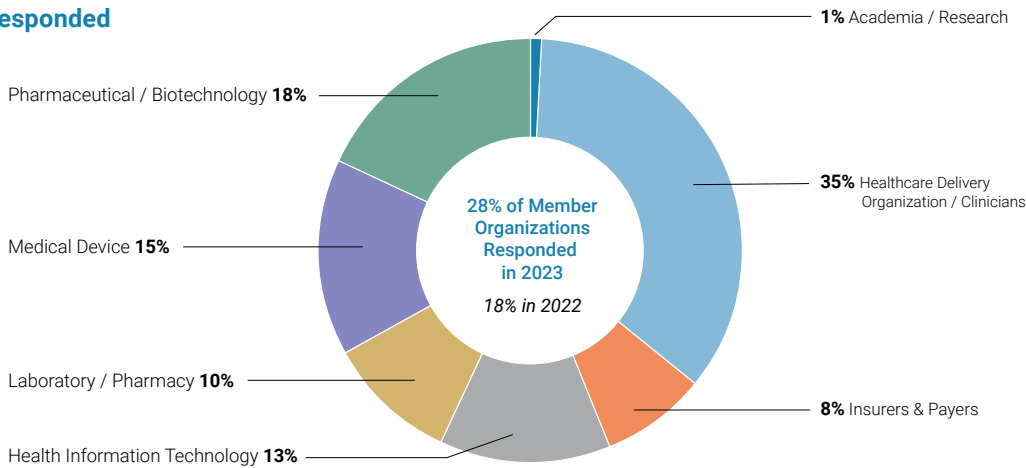
How Many Responded



Where are They From

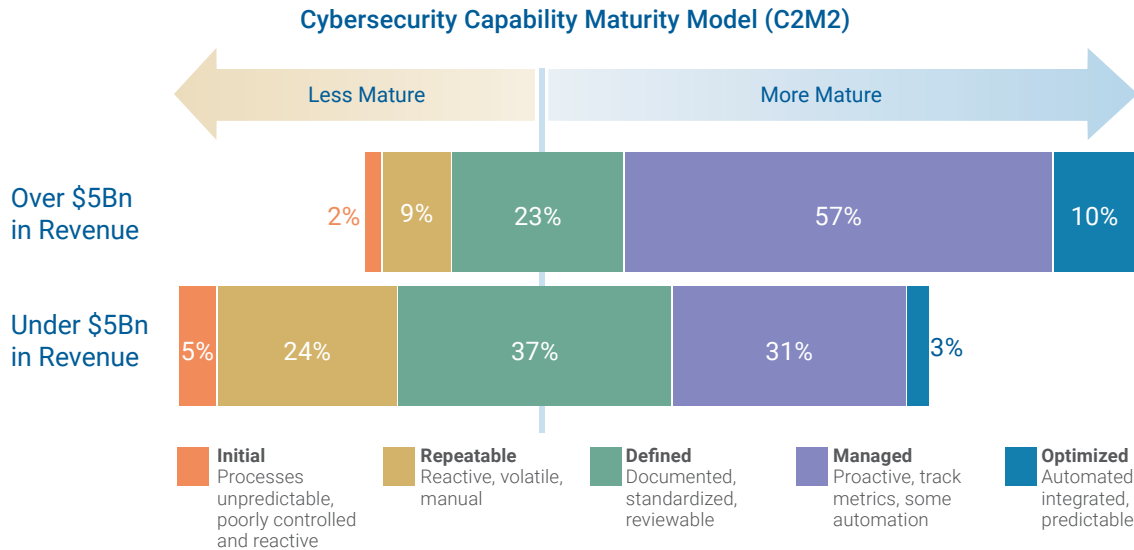


Who Responded





Participants were asked to rate their organizations based on the Cybersecurity Capability Maturity Model (C2M2); Overall, most organizations defined themselves as “Defined” or “Managed”. As seen from the charts, there are some variations between tiers and sub-segments. It is not surprising that organizations with revenue over \$5Billion were more likely to define themselves “Optimized” or “Managed.” While organizations with revenue under \$5Billion were fairly evenly divided between “Managed”, “Defined” and “Repeatable.”



Net Promoter Score

Net Promoter Score (NPS) is an industry standard that measures the willingness of customers to recommend the products or services they receive to others. It is a proxy for gauging overall customer satisfaction and loyalty. The creators of NPS, Bain & Company, suggest scores reflect the following sentiment: -100 to 0 = Needs Improvement; 0 to 29 = Good; 30 to 69 = Great; and 70 to 100 = Excellent.

Health-ISAC’s NPS is an excellent 71. As a way of reference: Amazon’s NPS is 73; and Netflix’s NPS is 67.

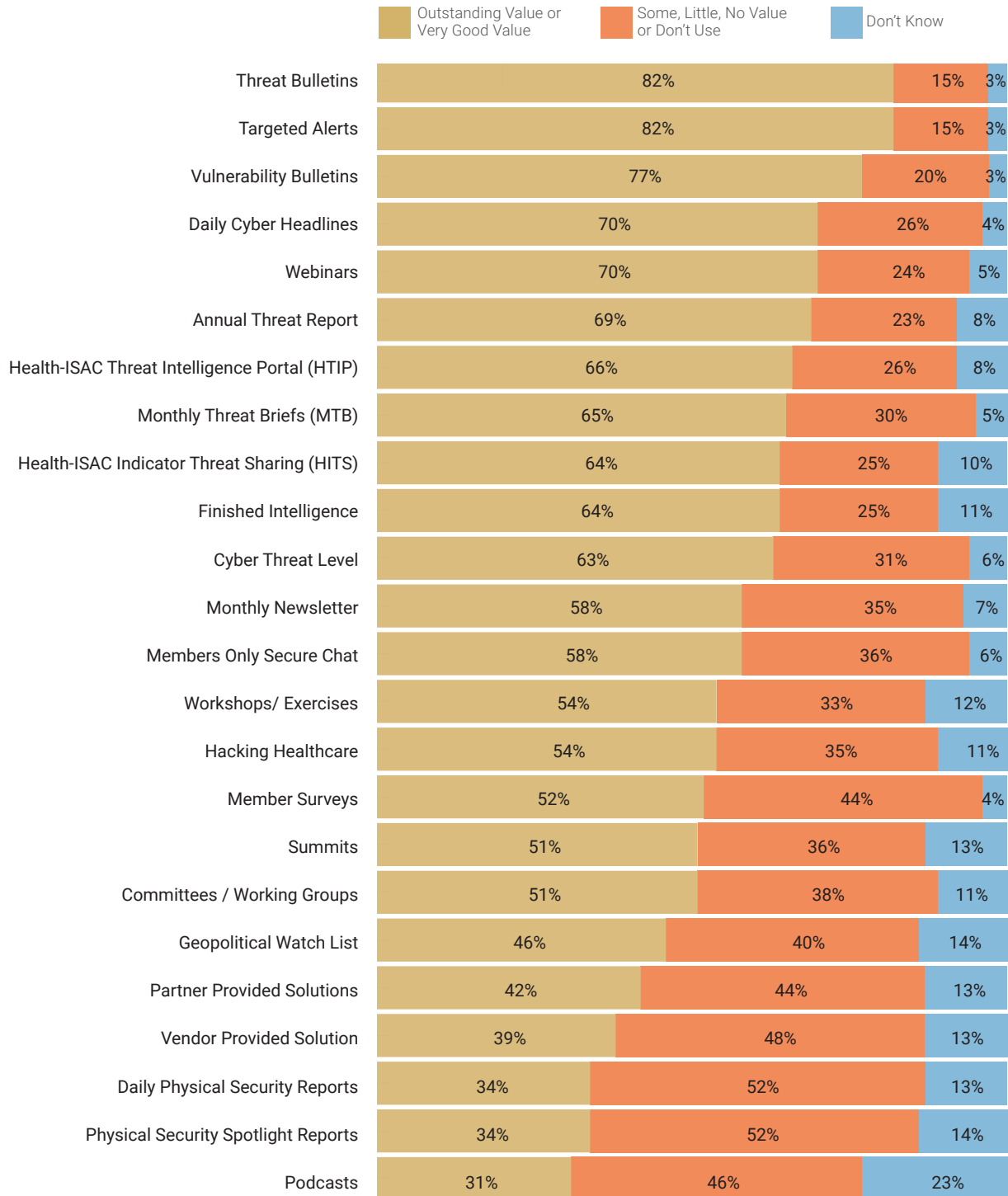




Health-ISAC's Service / Product Value



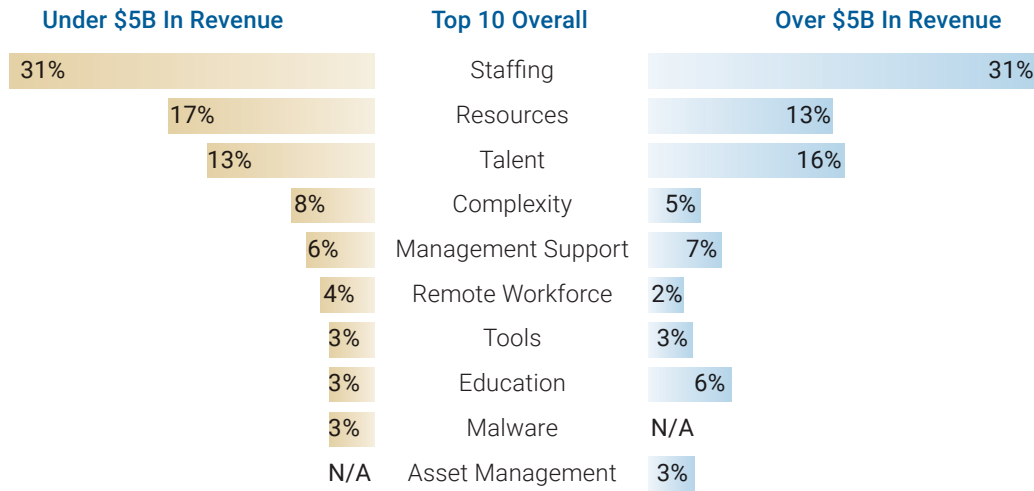
Health-ISAC Membership recognizes a very high level of value over the entire range of Health-ISAC offerings with an average "total value" score (Outstanding or Very Good or Some Value) of 77% out of 100%. The only services that did not rank above 60% on total value also had the highest responses for Don't Know / Don't Use.





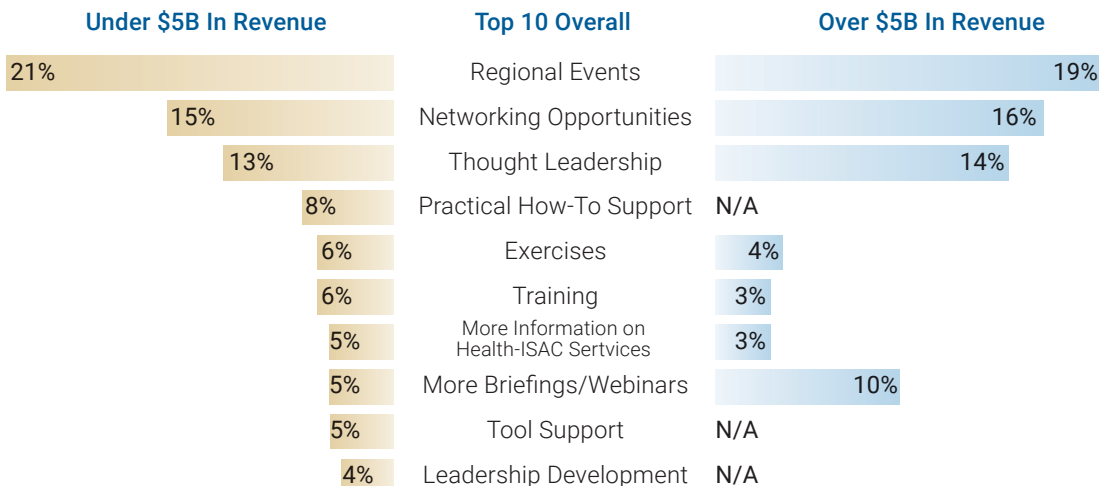
Biggest Challenges

60% of all respondents cited the lack of human or financial capital as their biggest concern. While all sizes of organizations agree on the top three challenges, there was some variation after that. Smaller organizations tended to be concerned by more tactical issues (e.g. Remote Workforce, Malware, etc.). The larger organizations tend to have more strategic concerns (e.g. Education, etc...).



Top Three Things Health-ISAC Could Do To Better Support You

While there are a number of initiatives that all members would like to see from Health-ISAC, Members from organizations under \$5 Billion are requesting very operational support (e.g. Practical How-To Support) while the Organizations over \$5 Billion tend to be more interested in evolving trends (e.g. Briefings / Webinars).





In Closing



It is clear that, Health-ISAC is delivering tremendously high value to the Membership, however, any organization must continue to grow and evolve to ensure it will consistently deliver high value into the future. In order to support that concept of continuous improvement, the detailed version of this report has been made available to all inhouse Health-ISAC staff so that they can use the data for internal evaluation. Furthermore, we will continue to benchmark and publish our performance metrics via annual surveys.

All organizations highly value the sharing of data; smaller organization's lack of maturity / resources creates a premium on easy / low-cost to consume and operational services, while larger organizations have the capacity to consume more strategic services:

- *Ensure service are targeted to specific maturity levels.*
- *Make live events more cost effective (regional events; include training, etc.)*

All sizes of organization agree on the top three challenges (Staffing, Talent, Resources), smaller organizations tended to be concerned by tactical issues and the larger organizations tend to have more strategic concerns:

- *Develop step-by-step guides / checklists for reuse.*
- *Identify low (no) cost solutions that can be easily implemented.*

Members from the smaller tiers are requesting very operational support while the larger tiers tend to be more interested in thought leadership and evolving trends:

- *Continue to invest in Thought Leadership to explore evolving and strategic issues.*
- *Consider an SMB Special Interest Group to help educate and coach smaller organizations.*

Health-ISAC Annual Member Satisfaction survey results underscore the organization's success in serving its Members and the healthcare industry. High response rates, positive NPS scores, highly valued services and the Member's own insights demonstrate the value provided. This data will guide Health-ISAC's efforts to enhance services and improve value delivery to its diverse Membership base.