

2024 Annual Health-ISAC Member Satisfaction Survey Results

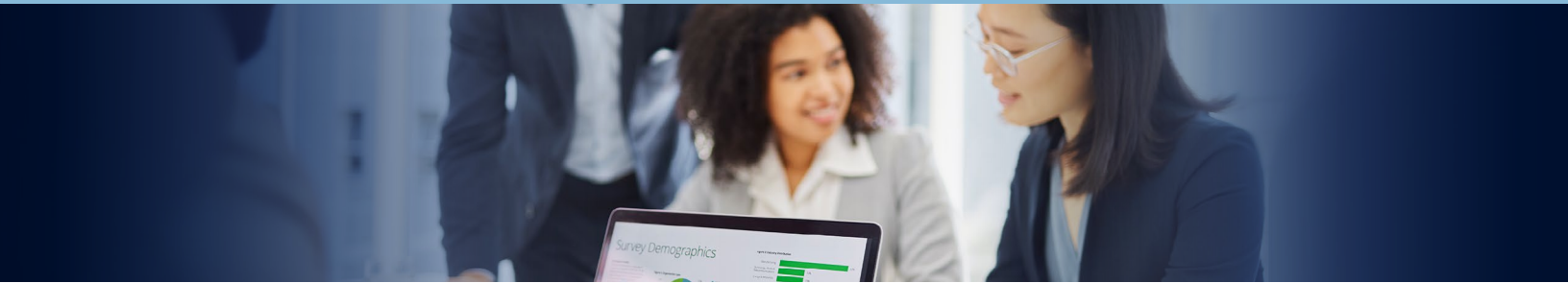
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Background

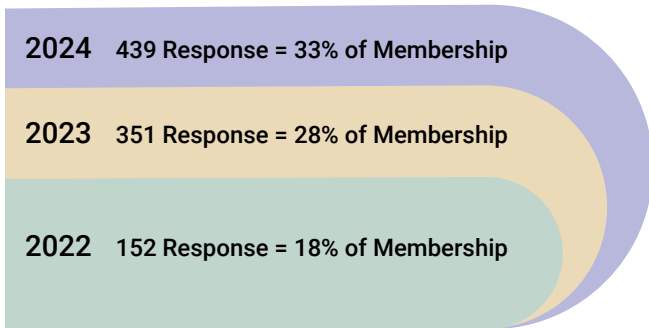


The third Annual Health-ISAC Member Satisfaction Survey was conducted from May 10– May 31, 2024.

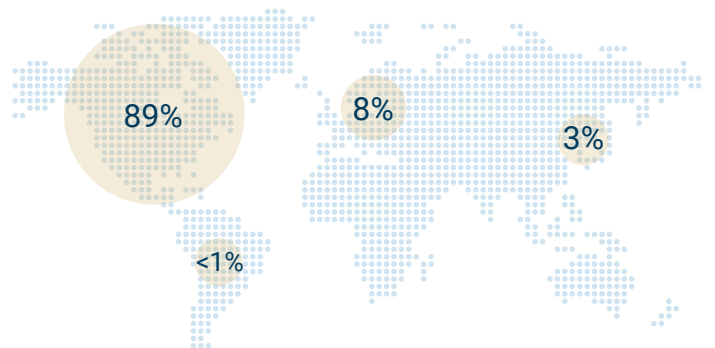
Demographics

We received 439 responses versus 351 last year, demonstrating substantial and sustained growth and awareness. We received feedback from 33% of our Member organizations versus 28% the previous year. The survey explored various demographics, such as organization size, lines of business, and roles. This year’s respondents are a very good match to Health-ISAC’s overall Membership demographics.

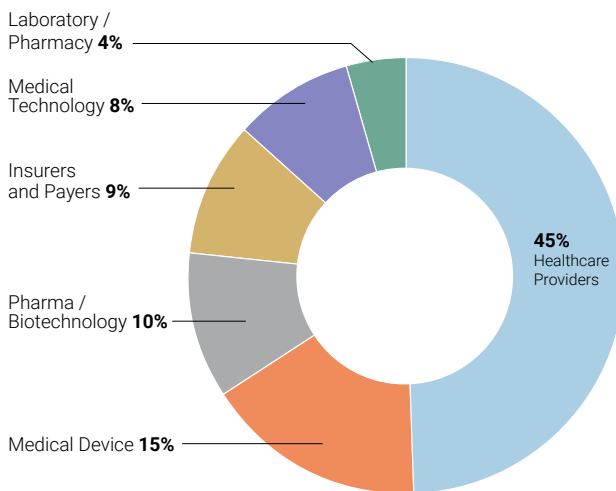
Membership Participation



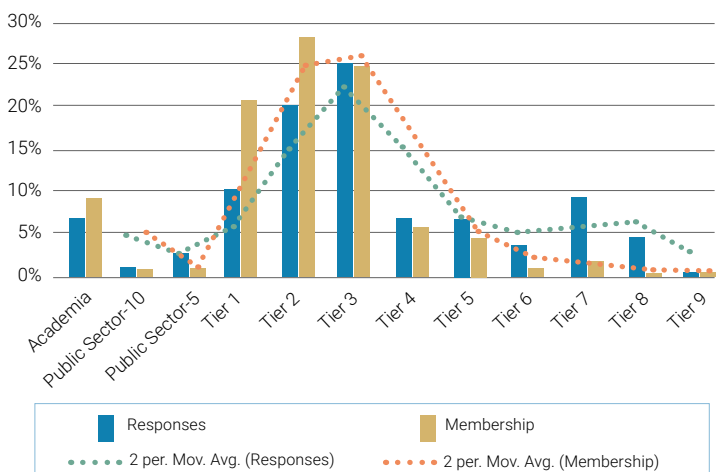
Respondent Location



Who Responded



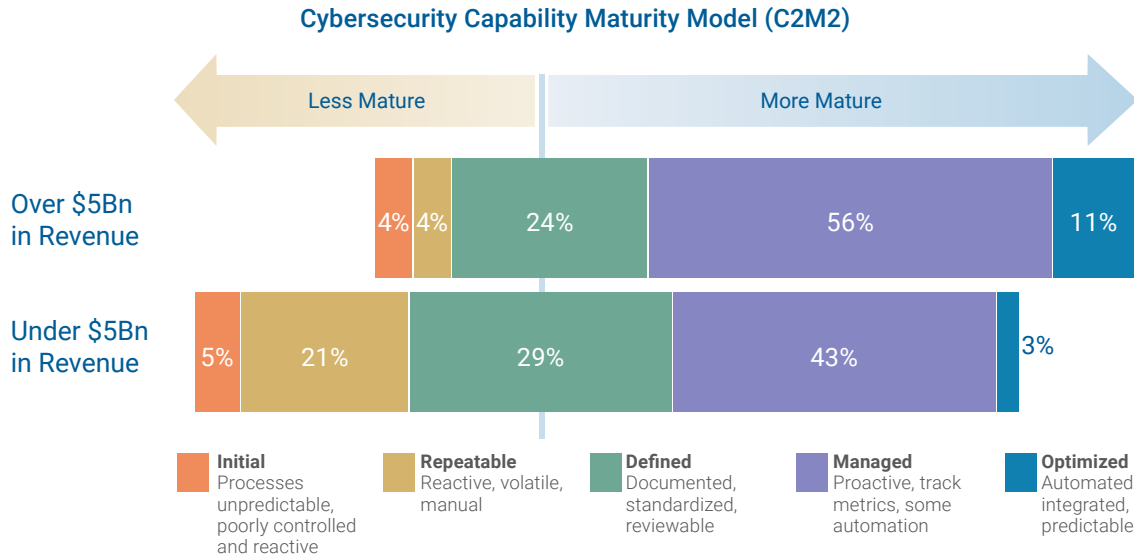
Response Demographic Vs Membership Demographic





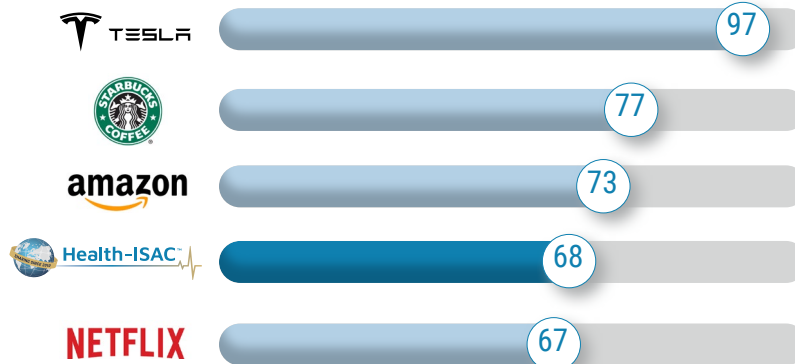
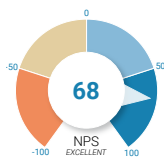
Cybersecurity Maturity

Participants were asked to rate their organizations based on [the Cybersecurity Capability Maturity Model \(C2M2\)](#); Overall, most organizations defined themselves as “Managed”. This is a significant improvement over past years when “Defined” and “Managed” were very close. As seen from the charts, there are some variations between tiers and sub-segments. It is not surprising that organizations with revenue over \$5 Billion were more likely to define themselves “Optimized.”



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; 1 to 20 = Good; 21 to 50 = Favorable; 51 to 80 = Excellent; 81 to 100 = World Class. **Health-ISAC’s NPS is an excellent 68.** As a way of reference: Amazon’s NPS is 73; and Netflix’s NPS is 67.

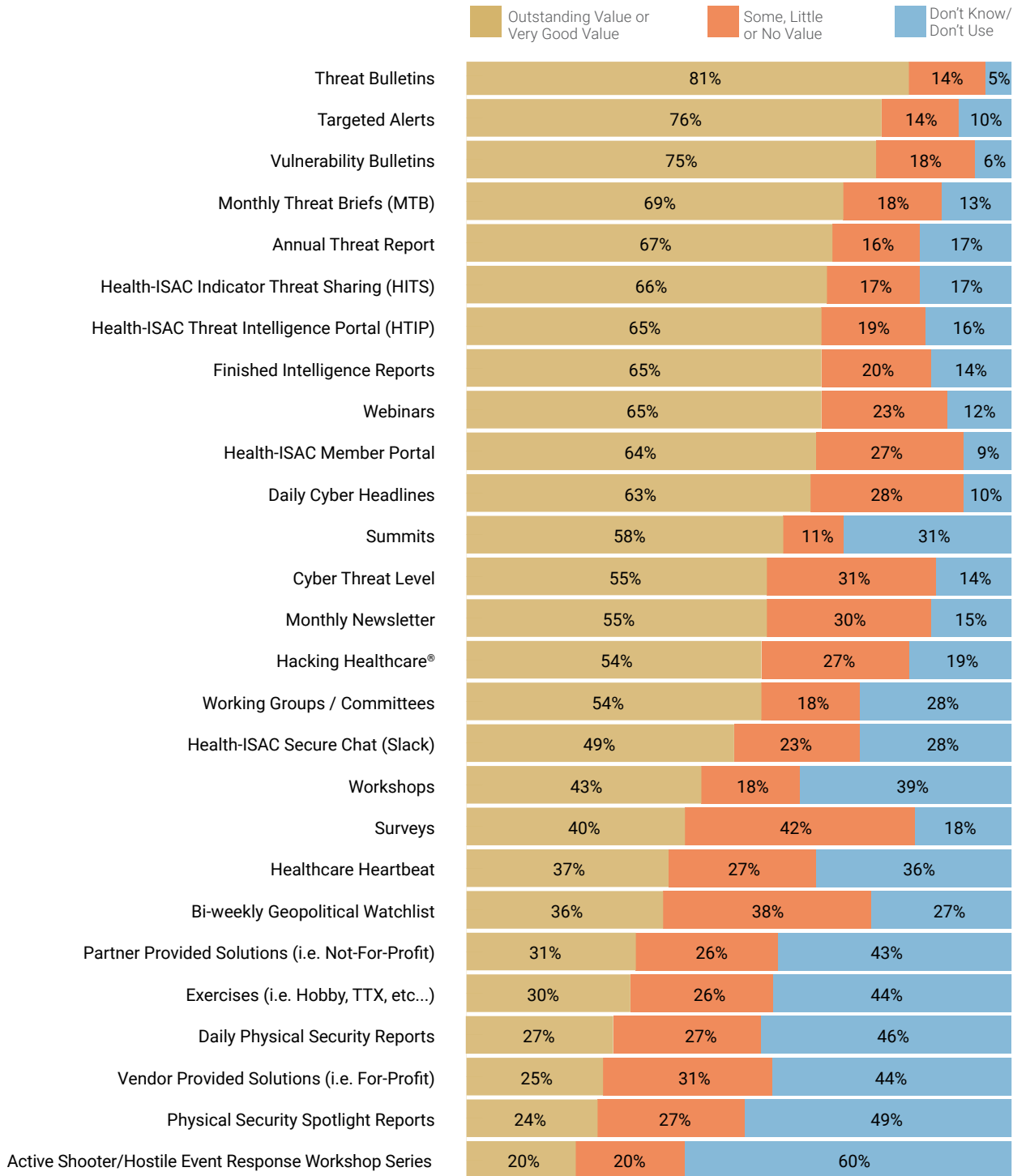




Health-ISAC's Service / Product Value



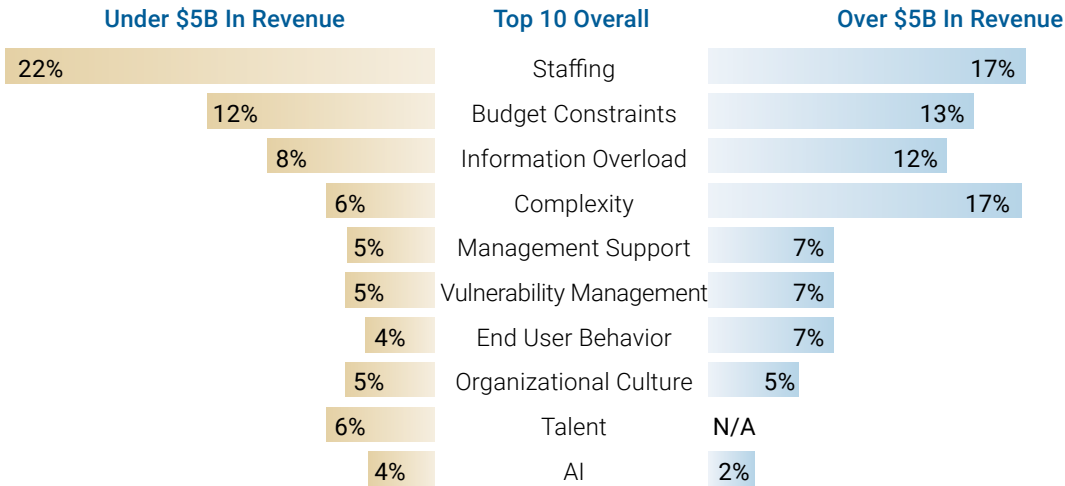
Health-ISAC Membership recognizes a very high level of value over the entire range of Health-ISAC offerings with an average "total value" score (Outstanding or Very Good or Some Value) of **71% out of 100% with "Threat Bulletins" scoring a whopping 95%**. The only services that did not rank above 60% on total value also had the highest responses for Don't Know / Don't Use.





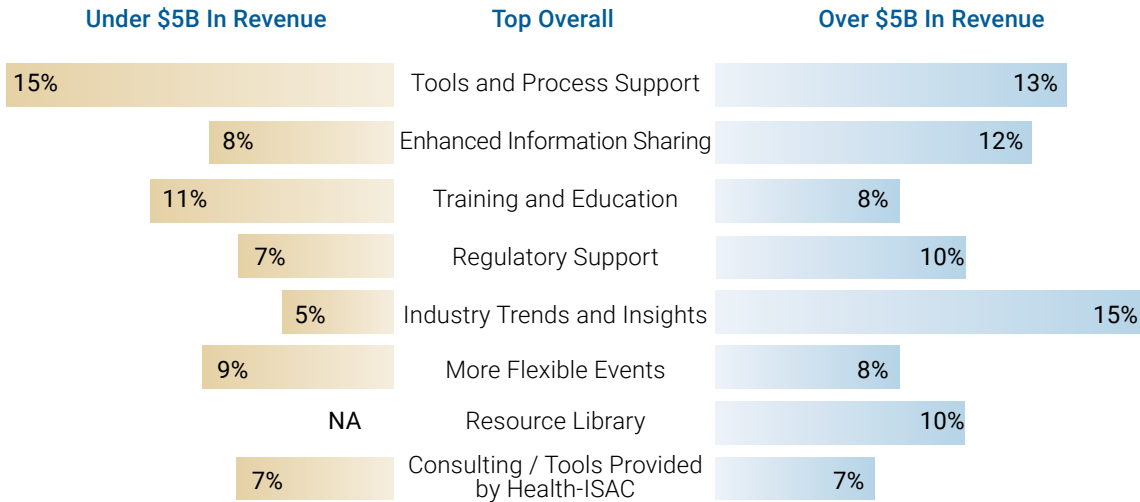
Biggest Challenges

35% of all respondents cited the lack of human or financial capital as their biggest concern — down significantly from past years. Second were technology challenges and third was support and awareness within their organization. While all sizes of organizations agree on many of the same top challenges, there was some variation after that. Smaller organizations tended to be concerned with more tactical issues (e.g. Staffing, Talent, etc...). The larger organizations tend to have more strategic concerns (e.g. Complexity, Ingesting Data, etc...).



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

Requests for practical support (Tools and Process Support, Resource Library, Consulting, etc...) have increased significantly over past years when developing human capital was more urgent. Results between larger and smaller organizations were rather similar with a slightly more strategic lean from larger organizations.





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 Health-ISAC staff so that they can use the data for internal evaluation. Furthermore, we will continue to benchmark and publish our performance metrics.

The evolution of organizations moving from “Defined” to “Managed” and also moving from “Managed” to “Optimized” is a trend to be encouraged. Health-ISAC will work to tailor resources for organizations of different sizes, recognizing that smaller organizations may need more foundational support while larger organizations may benefit from advanced strategic initiatives.

“Don’t Know/Don’t Use” responses are still too high. Health-ISAC will look at new ways of communication and education around lesser-known services that scored lower in value due to high “Don’t Know/Don’t Use” responses. For example, the organization will conduct webinars, workshops, and informational campaigns to highlight the benefits and uses of these services.

More than any other survey there was a lot of interest across the board to expand practical support offerings; increase the availability of practical support tools; process resources; and consulting services. Health-ISAC will ensure that these offerings are accessible and tailored to meet the specific needs of both smaller and larger organizations.

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