# The Implementation Paradox: Healthcare Leaders Want Microsegmentation-Level Security Without Disruption

*58% of Healthcare Leaders Prioritize Avoiding Clinical Downtime When Evaluating Microsegmentation—Yet 40% Say Fear of Disruption Blocks Implementation*

HIMSS ELISITY

January 2026

# Research Overview

# Research Overview

HIMSS Market Insights conducted this research in December 2025. The research was conducted among leaders in healthcare to understand their perspectives on data infrastructure and network security. Topics included:

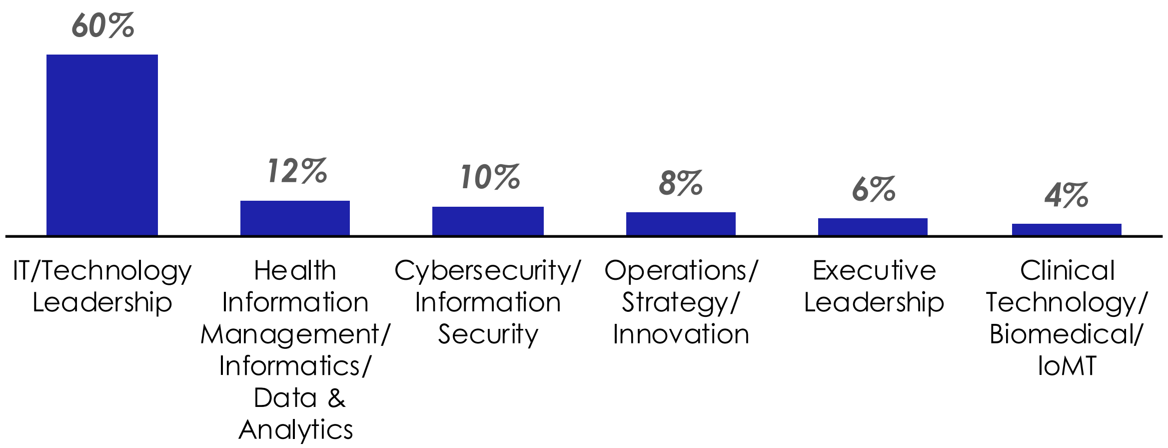
- Gaps or limitations in organizations' current IoMT, medical device security, and protection strategies
- Actions taken by cyber insurance carriers in the last two years
- Most important ROI outcomes when considering microsegmentation investments
- Decision drivers when evaluating microsegmentation solutions
- Barriers to implementing microsegmentation strategies

# Methodology

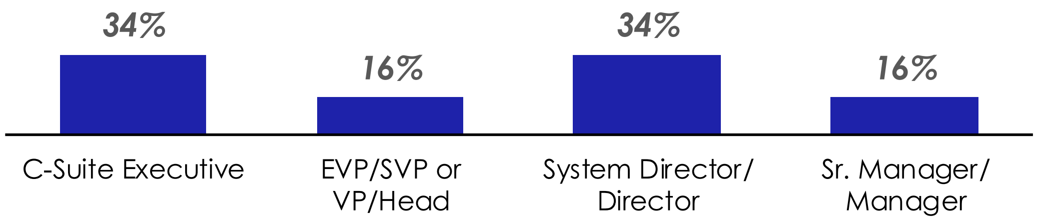
- This research was conducted online amongst Executives and IT/Technology, Cybersecurity/Information Security, Clinical Technology/Biomedical/IoMT, Health Information Management/Informatics/Data & Analytics, and Operations/Strategy/Innovation leaders (managers and above) in healthcare in the United States.
- Respondents were screened for working in organizations with 300 or more hospital beds and annual revenues exceeding $500 million. Additionally, respondents were screened for having a role in their organizations' strategy and investments related to data infrastructure and network security.
- A total of 50 qualified respondents participated in this research.
- This was a blind data collection effort; Elisity was not identified as a sponsor of the research.

# Respondent Profile

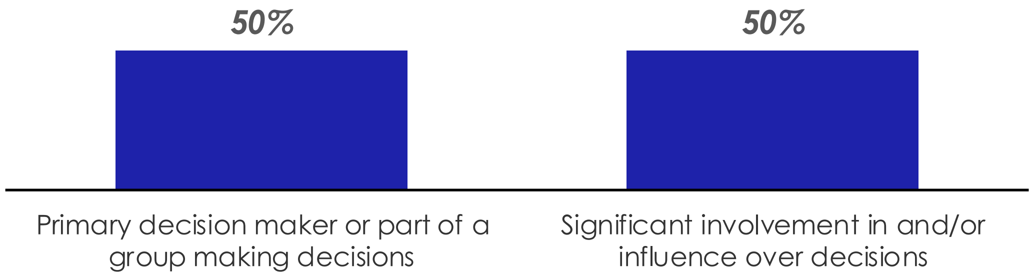
## Job Function




## Job Role



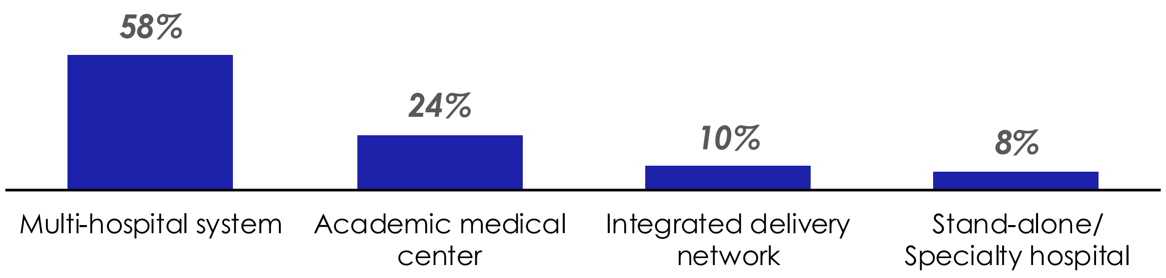

## Role Regarding Organization's Data Infrastructure and Network Security Strategy and Investments



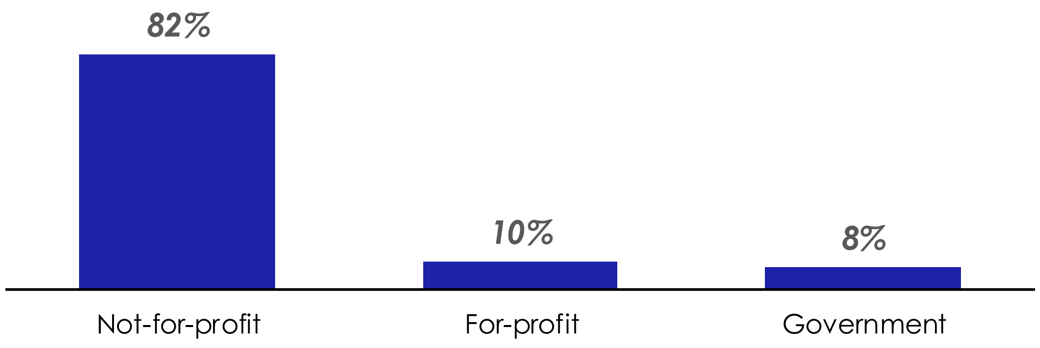

S5. How would you best characterize your job function?
S4. What is your current role?
S6. Which of the following best describes your role regarding the management of your organization's strategy and investments related to its data infrastructure and network security?
Base: Total Respondents; n = 50

# Respondent Organizational Profile

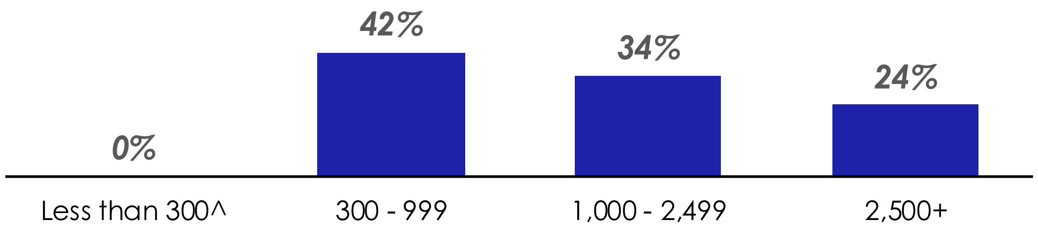
## Worksite




## Ownership

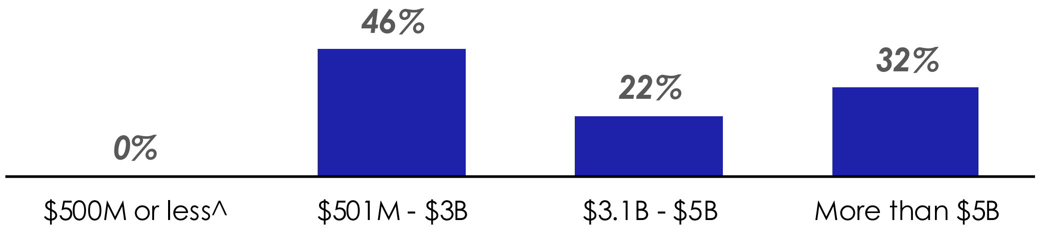



## Number of Hospital Beds




^Survey targeted organizations with ≥300 hospital beds

## Annual Revenue




^Survey targeted organizations with >$500M in annual revenue

S1. Which of the following best describes your worksite?
S8. Which of the following best describes your health system / hospital ownership?
S2. Please tell us the total number of hospital beds in your organization.
S3. What is your organization’s annual net revenue?
Base: Total Respondents; n = 50

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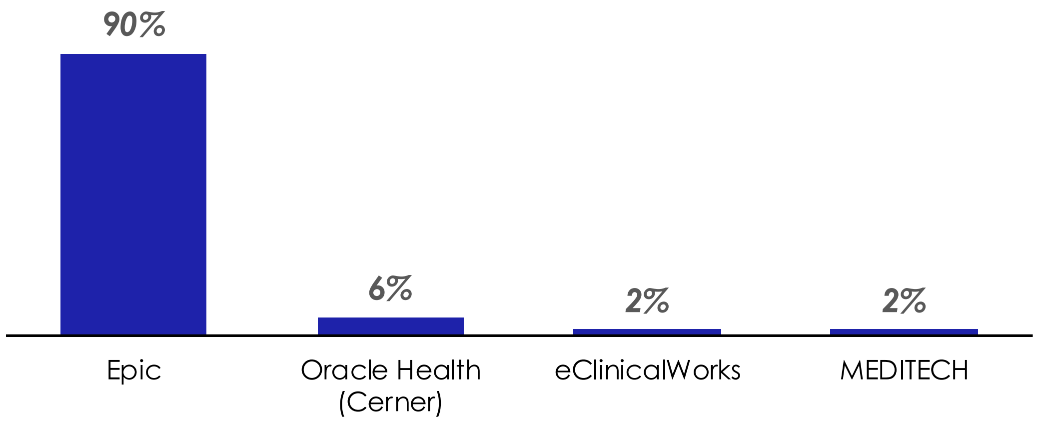
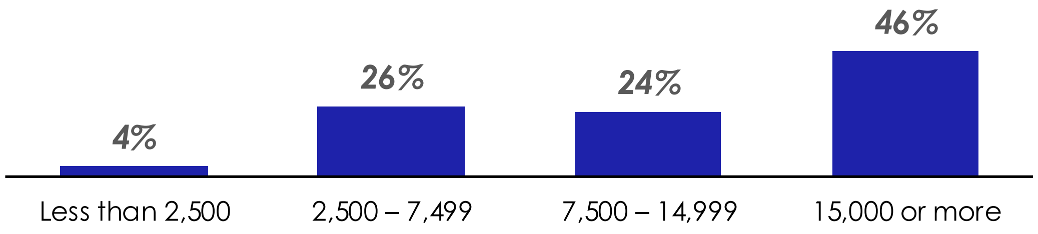
# Respondent Organizational Profile (cont.)

EHR Platform




Number of Employees

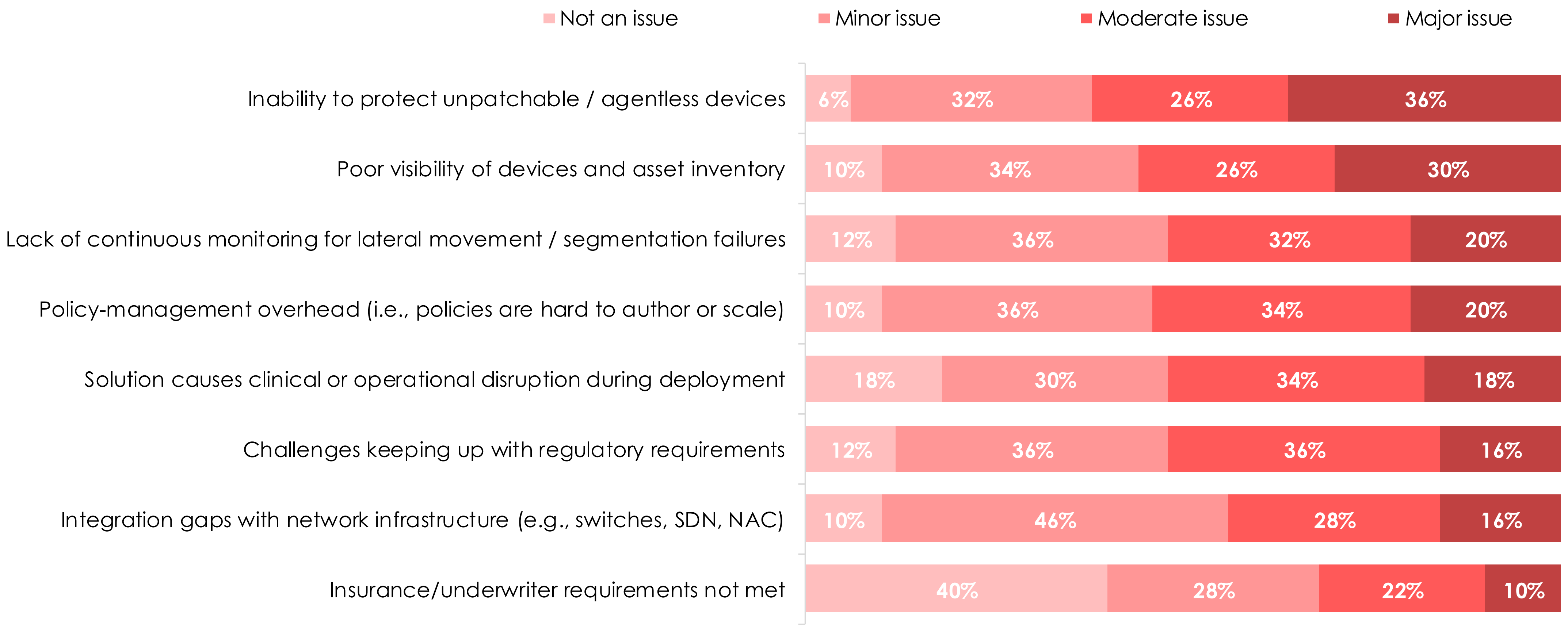



S7. What is your organization's primary EHR (electronic health records) platform?
S9. Please tell us the total number of employees in your organization.
Base: Total Respondents; n = 50

# Detailed Findings

# Healthcare organizations' biggest infrastructure security limitations are their inability to protect unpatchable/agentless devices and poor visibility of devices and asset inventory

## To what extent are each of the following gaps or limitations in your organization's current IoMT / medical device security / protection strategy?

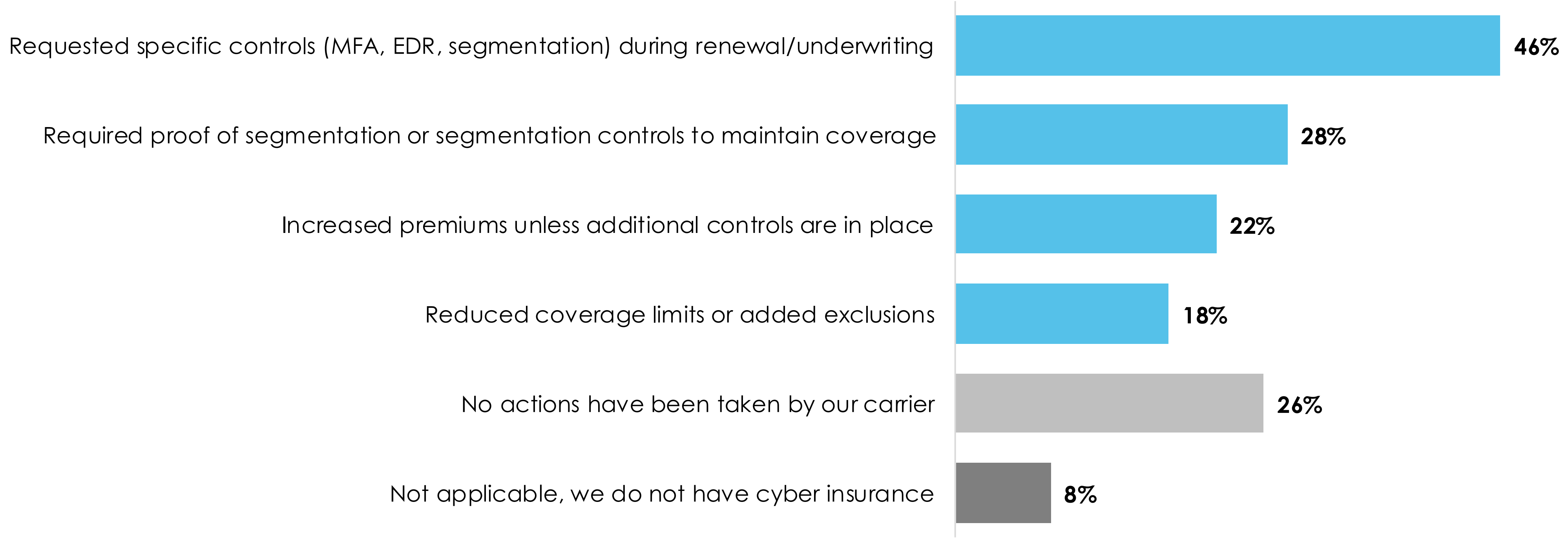



*Not displayed: 'Something else' (n=4)*

Q1. To what extent are each of the following gaps or limitations in your organization's current IoMT / medical device security / protection strategy?
Base: Total Respondents; n = 50

# *Nearly half of health organizations report their cyber insurance carriers requesting specific controls during renewal or underwriting in the last two years*

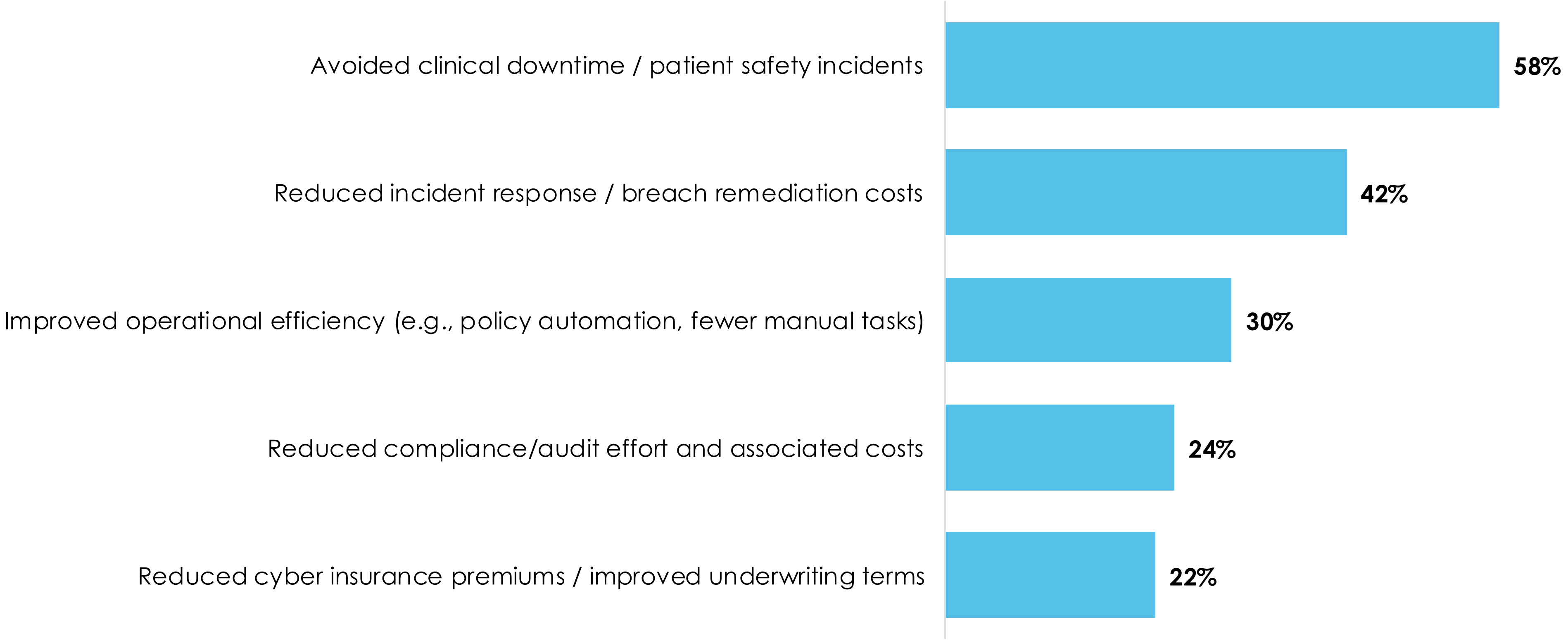
***Has your cyber insurance carrier taken any of the following actions in the last 24 months?***




Q2. Has your cyber insurance carrier taken any of the following actions in the last 24 months?
Base: Total Respondents; n = 50

# *Avoiding clinical downtime and patient security incidents is the most often cited ROI outcome leaders look for when considering microsegmentation investments*

## *As you consider investing in microsegmentation, which of the following ROI outcomes are most important to your organization?*

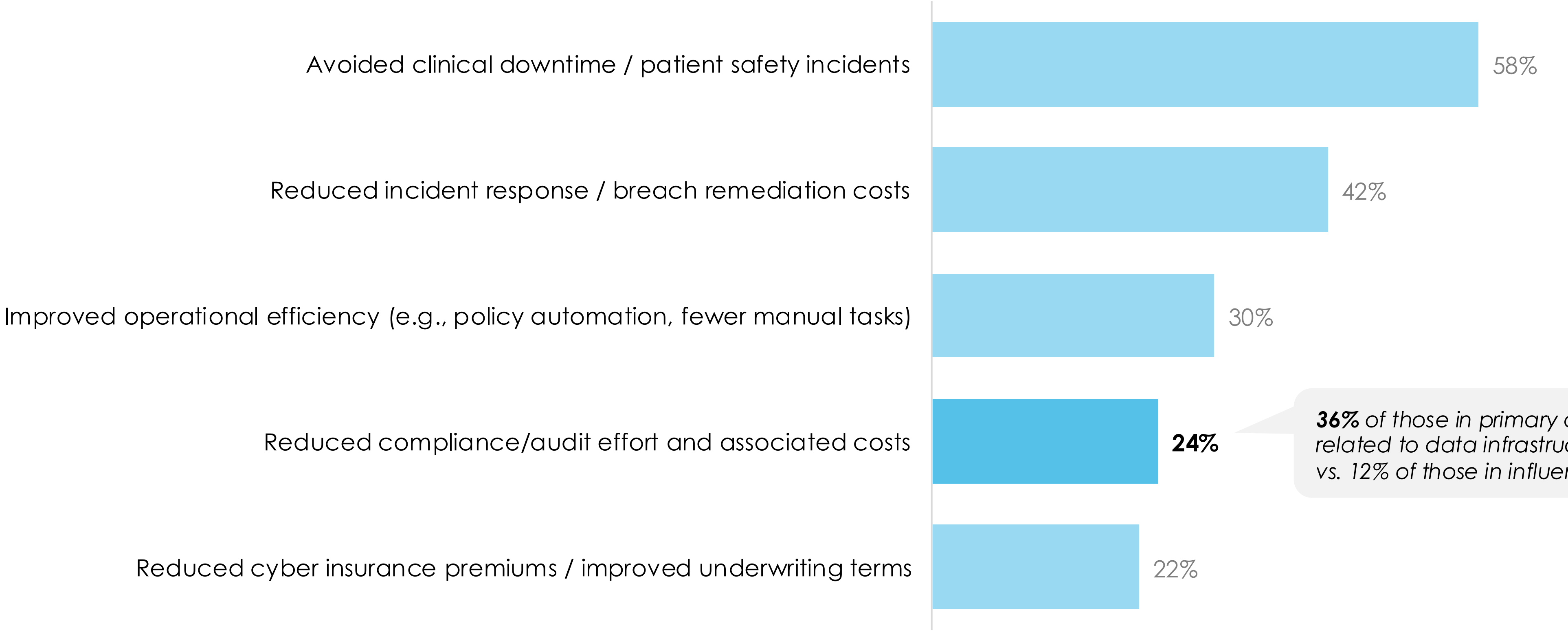



*Not displayed: 'Other' (n=2)*

Q3. As you consider investing in microsegmentation, which of the following ROI outcomes are most important to your organization? Please select up to two items.
Base: Total Respondents; n = 50

# Leaders playing a primary role in decision-making about their organizations' infrastructure and network security more often say reduced compliance/audit effort and the associated costs is a key ROI outcome they consider

## *As you consider investing in microsegmentation, which of the following ROI outcomes are most important to your organization?*



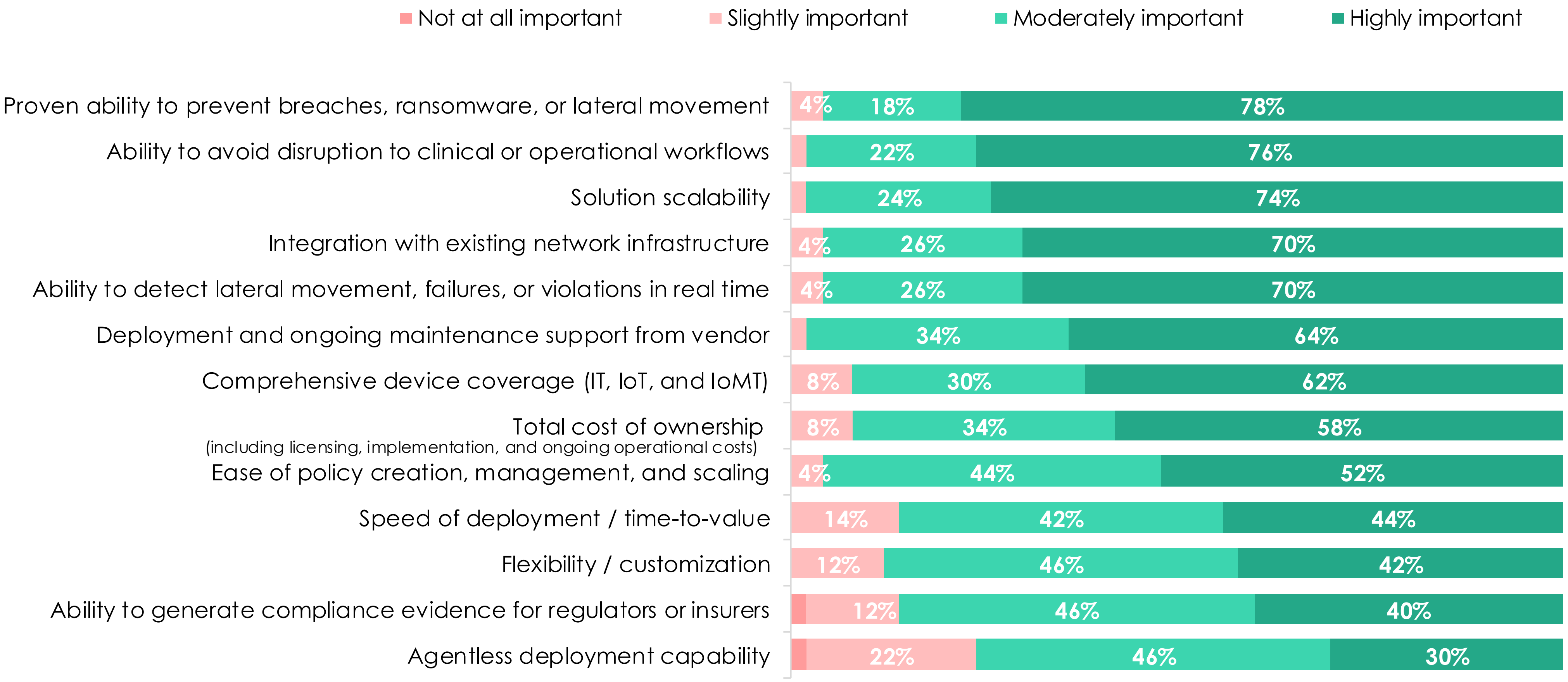

***36%** of those in primary decision-making roles related to data infrastructure and network security vs. 12% of those in influencer decision-making roles*

*Not displayed: 'Other' (n=2)*

Q3. As you consider investing in microsegmentation, which of the following ROI outcomes are most important to your organization? Please select up to two items.
Base: Total Respondents; n = 50

# *When evaluating microsegmentation solutions, leaders are most likely to say a proven ability to prevent threats, avoid disruption, and scale with their business are important factors in their decision-making*

## *When evaluating microsegmentation solutions, how important are each of the following factors in your organization’s decision-making?*

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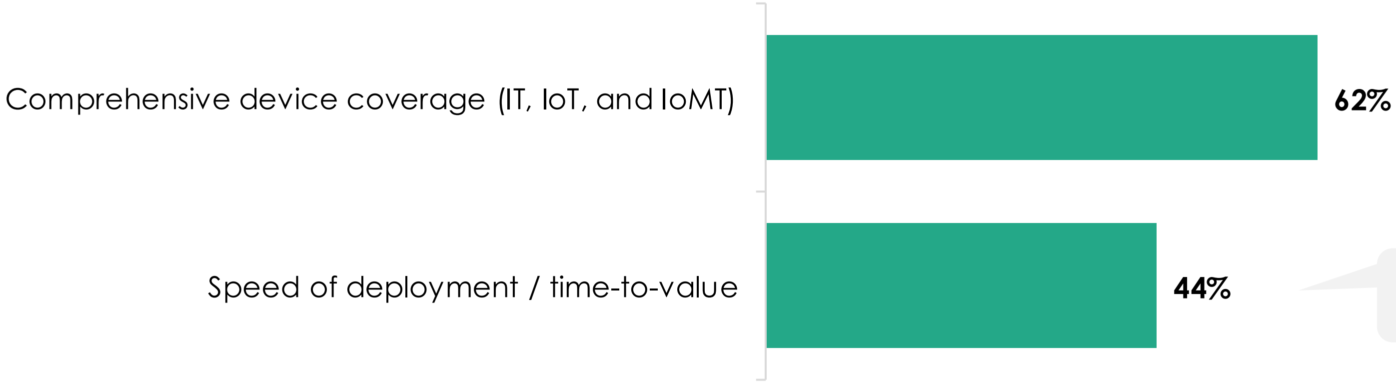
*Data labels <3% not shown*

Q5. When evaluating microsegmentation solutions, how important are each of the following factors in your organization’s decision-making?
Base: Total Respondents; n = 50

# Comprehensive device coverage is more often considered highly important by leaders in organizations with $5.1M-$3B in annual net revenue, while speed of deployment / time-to-value is more often considered highly important for those in multi-facility worksites

## When evaluating microsegmentation solutions, how important are each of the following factors in your organization's decision-making?

**% Highly Important**




***78%** of those in organizations with $5.1M to $3B in annual net revenue* vs. 48% of those in organizations with more than $3B in annual net revenue*

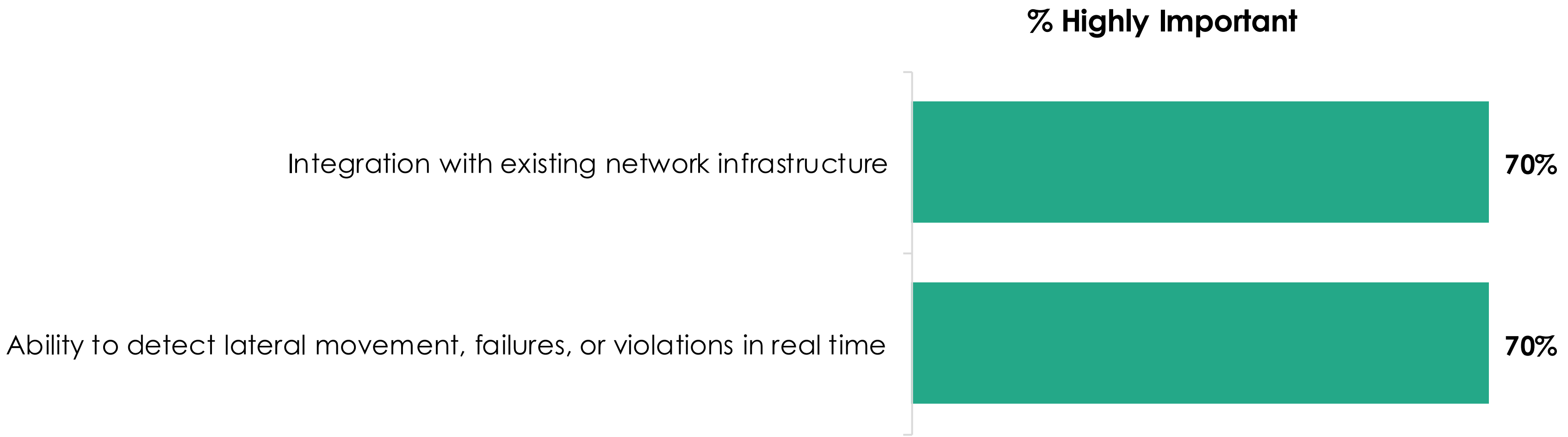
***53%** of those in multi-facility worksites^ vs. 25% of those in single-facility worksites^**

**Low base size, insights for directional use only*
*^Single Facility = Academic Medical Centers, Stand-Alone/Specialty Hospitals, and Clinic/practice settings; Multi-Facility = Integrated Delivery Networks and Multi-Hospital Systems*

Q5. When evaluating microsegmentation solutions, how important are each of the following factors in your organization's decision-making?
Base: Total Respondents; n = 50

# Primary decision makers for data infrastructure and network security are more likely to consider integration with existing infrastructure and the ability to detect threats in real time highly important when evaluating microsegmentation solutions

## *When evaluating microsegmentation solutions, how important are each of the following factors in your organization's decision-making?*

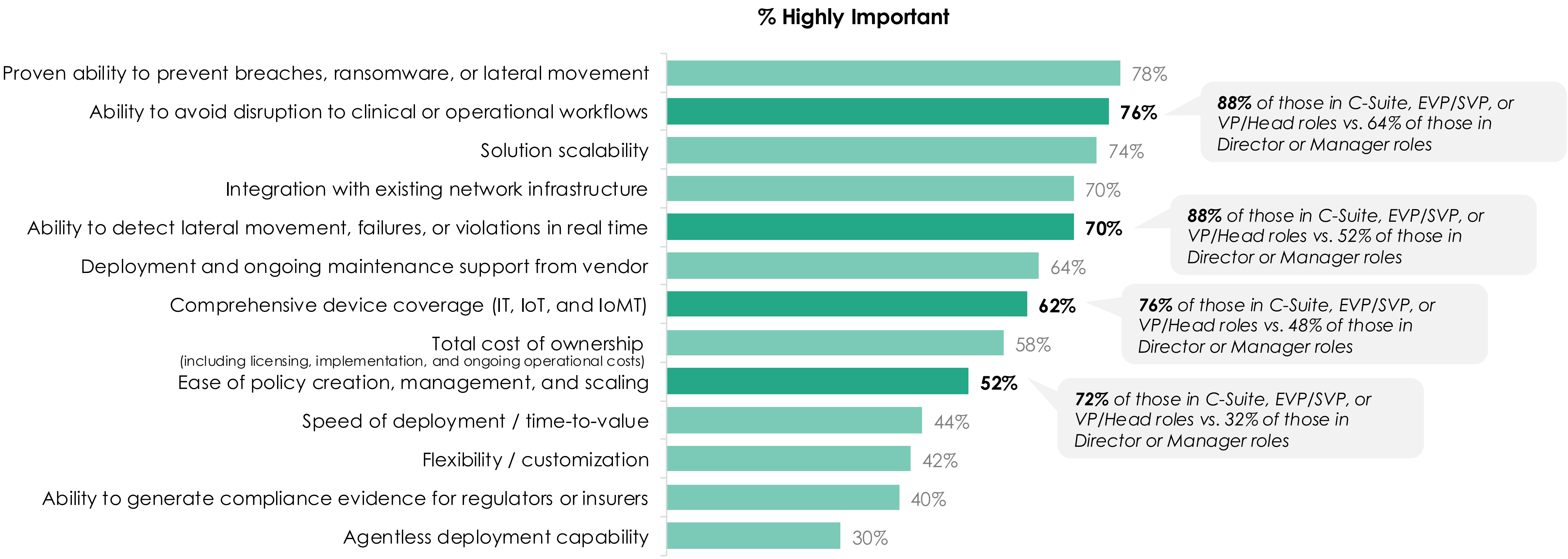



***84%** of those in primary decision-making roles related to data infrastructure and network security vs. 56% of those in influencer decision-making roles*

Q5. When evaluating microsegmentation solutions, how important are each of the following factors in your organization's decision-making?
Base: Total Respondents; n = 50

# Senior leaders more often say a solution's ability to avoid disruptions, detect lateral movement or threats in real time, provide comprehensive device coverage, and offer ease of policy creation, management, and scaling are highly important factors when evaluating microsegmentation solutions

## When evaluating microsegmentation solutions, how important are each of the following factors in your organization's decision-making?

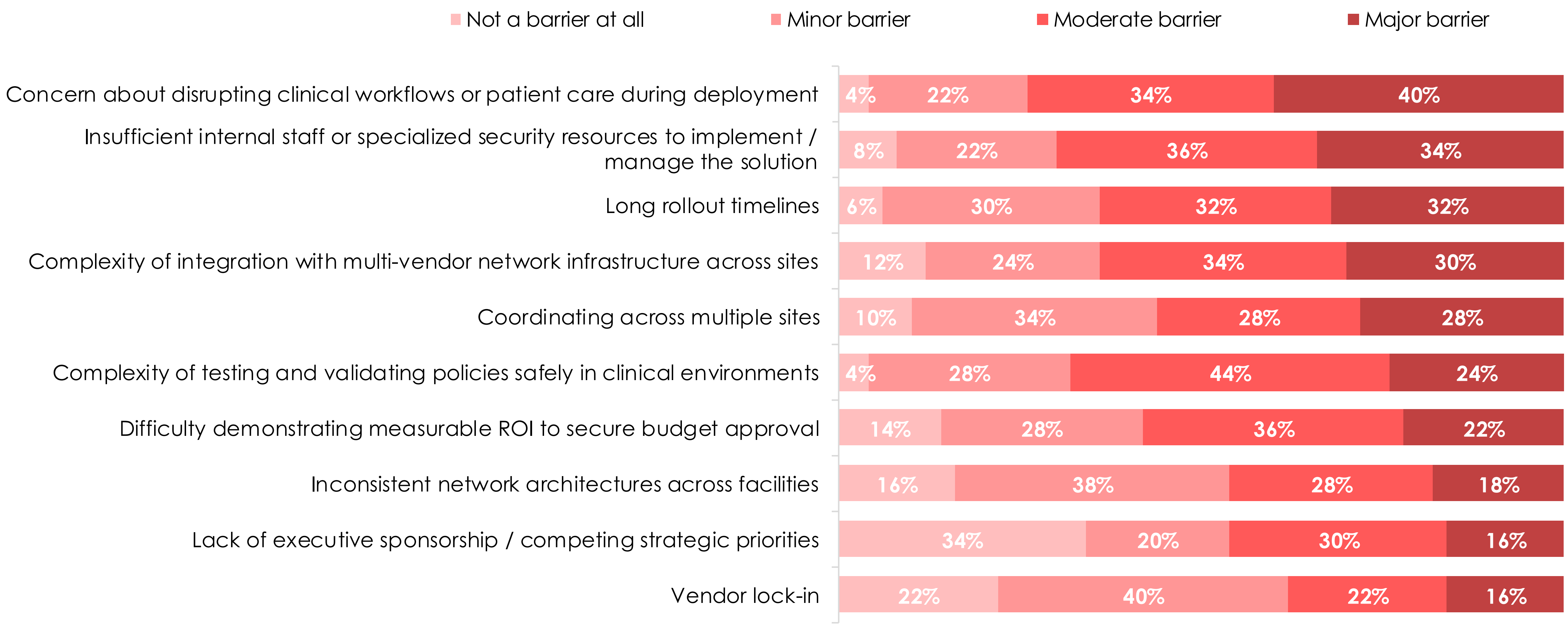





Q5. When evaluating microsegmentation solutions, how important are each of the following factors in your organization's decision-making?
Base: Total Respondents; n = 50

# *More than one-third of healthcare leaders say concerns about disrupting clinical workflows or patient care and insufficient internal staff or resources to manage microsegmentation are key barriers to implementation in their environments*

## *To what extent have each of the following been barriers to implementing microsegmentation in your environment?*

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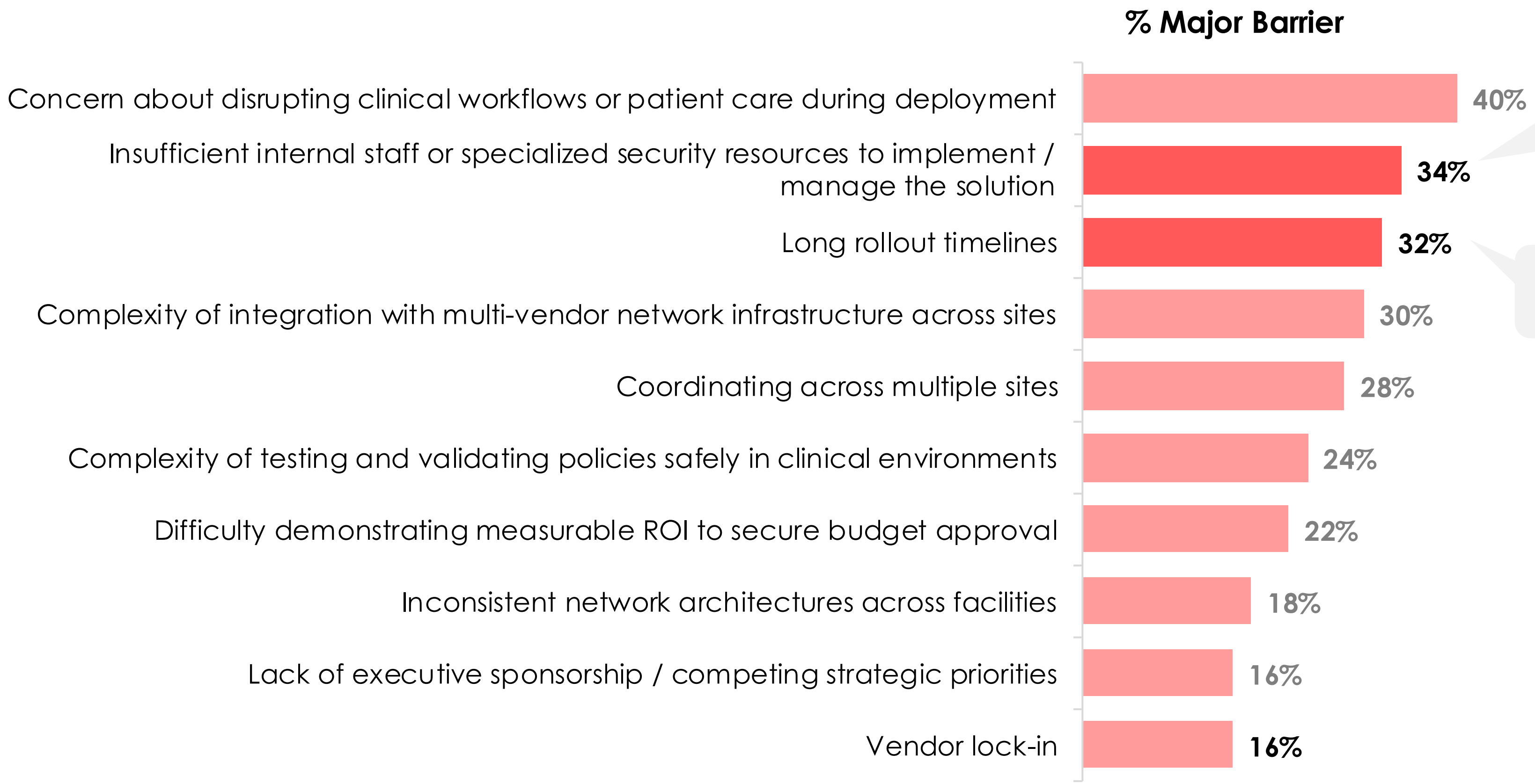
Q4. To what extent have each of the following been barriers to implementing microsegmentation in your environment?
Base: Total Respondents; n = 50

# Insufficient internal resources to manage microsegmentation and vendor lock-in are more often barriers for those in mid-sized organizations; IT and Tech leaders more often say long rollout timelines is a barrier to their organization implementing microsegmentation compared to leaders in other roles

## *To what extent have each of the following been barriers to implementing microsegmentation in your environment?*




***62%** of those in organizations with 300-999 hospital beds* vs. 14% of those in organizations with 1,000 or more hospital beds*

***43%** of those in IT or Tech leadership functions vs. 15% of those in other roles**

*Not displayed: 'Something else' (n=3)*
**Low base size, insights for directional use only*

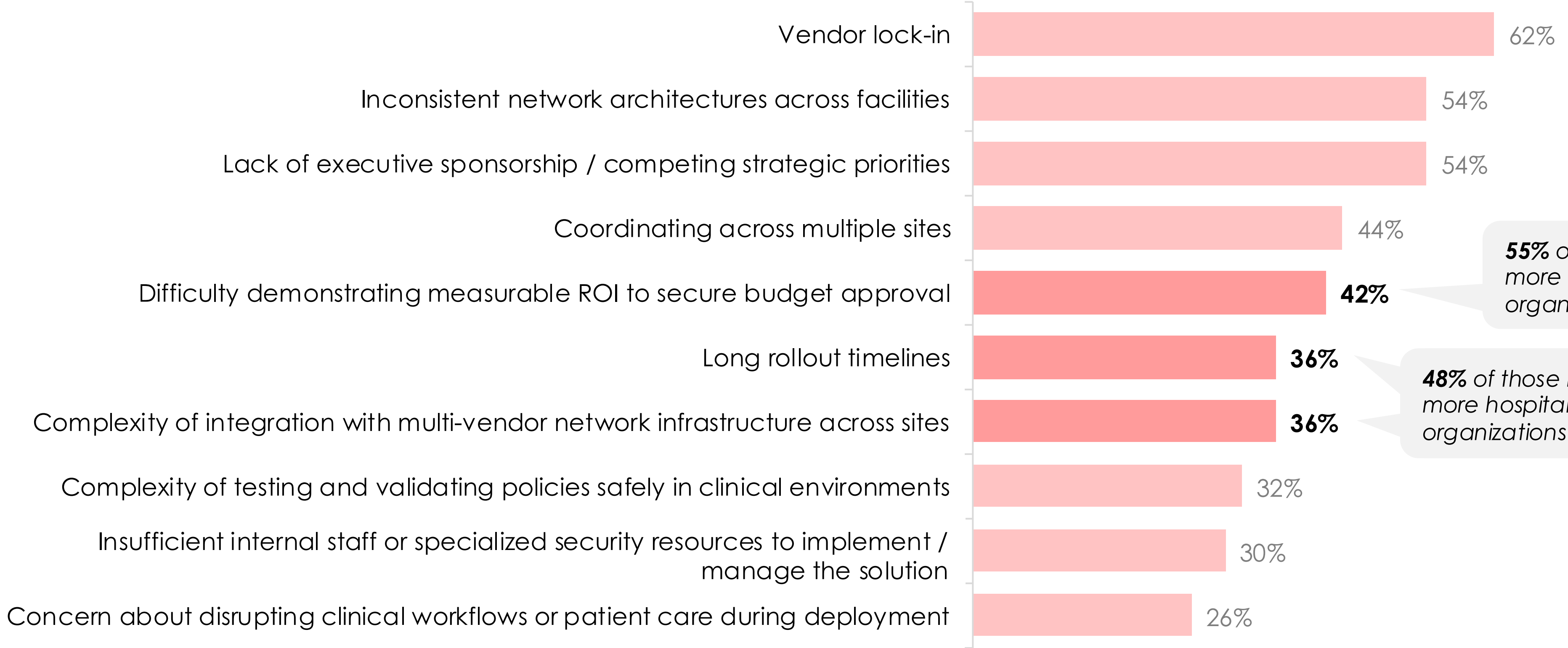
Q4. To what extent have each of the following been barriers to implementing microsegmentation in your environment?
Base: Total Respondents; n = 50

# *Leaders in large organizations (1,000+ hospital beds) are significantly less likely to say difficulty demonstrating measurable ROI to secure budget, long rollout timelines, or the complexity of integration across sites are meaningful barriers to implementing microsegmentation*

## *To what extent have each of the following been barriers to implementing microsegmentation in your environment?*

**% Bottom-2-Box Barrier**

*(Minor barrier or Not a barrier at all; Sorted by Bottom-2-Box values)*




***55%** of those in organizations with 1,000 or more hospital beds vs. 24% of those in organizations with 300-999 hospital beds**

***48%** of those in organizations with 1,000 or more hospital beds vs. 19% of those in organizations with 300-999 hospital beds**

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*Not displayed: 'Something else' (n=3)*
**Low base size, insights for directional use only*

Q4. To what extent have each of the following been barriers to implementing microsegmentation in your environment?
Base: Total Respondents; n = 50

# Key Takeaways

1

**More than three-in-five healthcare organizations report gaps in their ability to protect unpatchable or agentless devices**

Organizations' biggest network security limitations are their inability to protect unpatchable or agentless devices (36% rate this as a critical or significant issue), poor visibility of devices and asset inventory (30%), lack of continuous monitoring for lateral movement and segmentation failures (20%), and policy-management overhead (20%).

2

**Nearly half of healthcare leaders surveyed say their cyber insurance carrier has requested specific controls during renewal or underwriting in the last two years**

More than one-fifth of leaders have also reported their cyber insurance carrier required proof of segmentation or segmentation controls to maintain coverage (28%) or increased their premiums unless additional controls were put in place (22%) in the last 24 months. Larger organizations (those with more than $3B in annual revenue or 15,000+ employees) are more likely to report not currently having cyber insurance.

3

**Avoiding clinical downtime and patient safety incidents is the primary ROI outcome leaders are looking for when considering microsegmentation investments**

Reducing incident response and breach remediation costs is also often cited as one of the most important ROI outcomes when considering microsegmentation investments (42%). Reducing compliance/audit effort and the associated costs are more often cited as important for leaders with primary decision-making roles in their organizations' data infrastructure and network security strategies and investments (36% vs. 12% of those in influencer positions).

# Key Takeaways

4

### When evaluating microsegmentation solutions, leaders place a great deal of emphasis on the ability to avoid workflow disruptions

More than two-in-five (44%) say it is extremely important that a microsegmentation solution is able to avoid disruption to clinical or operational workflows. Overall, leaders are most likely to say a solution's proven ability to prevent breaches, ransomware, or lateral movement (78%), ability to avoid disruption to clinical or operational workflows (76%), scalability (74%), integration with existing network infrastructure (70%), and ability to detect lateral movement, failures, or violations in real time (70%) are highly important.

5

### Concerns about workflow disruptions is the primary barrier to implementing microsegmentation in healthcare environments

Two-in-five (40%) healthcare leaders say concerns about disrupting clinical workflows or patient care during deployment has been a barrier to implementing microsegmentation in their environments. Additional barriers include insufficient internal staff or specialized security resources to implement and manage the solution (34%), long rollout timelines (32%), and the complexity of integration with multi-vendor network infrastructure across sites (30%). Insufficient resources is more often a challenge for organizations with 300-999 hospital beds (62% vs. 14% of those with 1,000+ beds), while rollout timelines are more often cited by IT and Tech leaders (43% vs. 15% of those in other roles).

# Thank You

For more information please contact:

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