

Network Infrastructure

April 2025



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Research Overview

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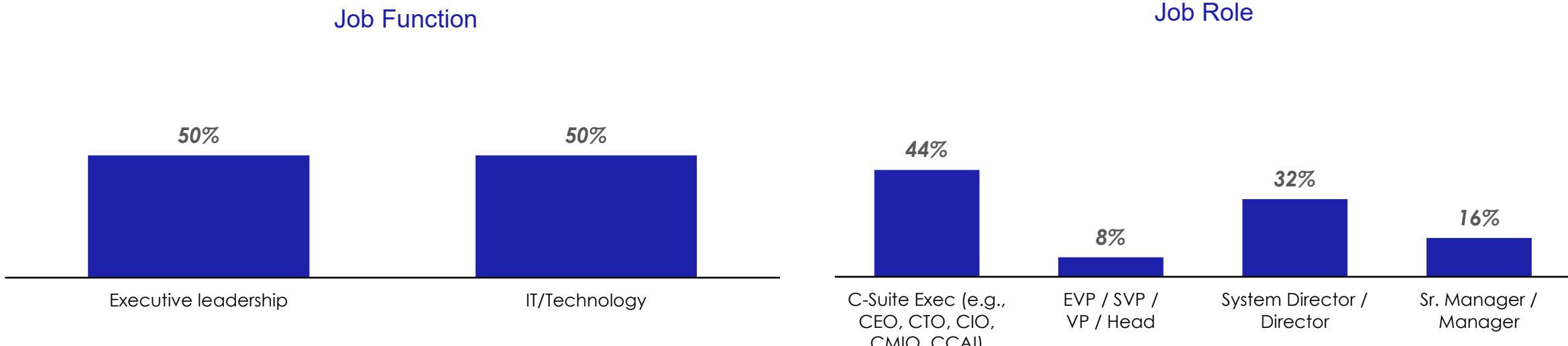
HIMSS Market Insights conducted this research in March and April 2025. The research was conducted among leaders in healthcare to understand their perspective on their organization's network infrastructure. Topics included:

- Impact of network reliability and performance challenges on patient care
- Risks and financial impacts associated with outdated networks
- Overall interest in a Neutral Host Network as a solution

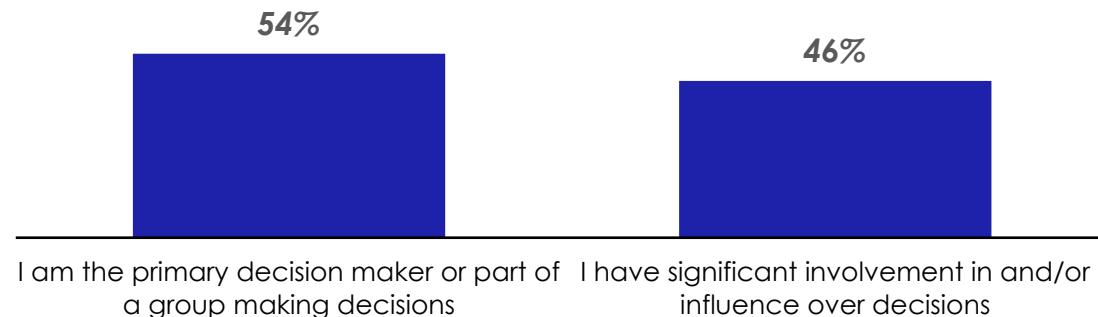
Methodology

- This research was conducted online amongst Executives and IT/Technology leaders (managers and above) in healthcare in the United States.
- Respondents were screened for having a decision making or influencing role regarding long-term information technology strategies and investments at their organizations.
- A total of 50 qualified respondents participated in this research.
- This was a blind data collection effort; Verizon was not identified as a sponsor of the research.

Respondent Profile



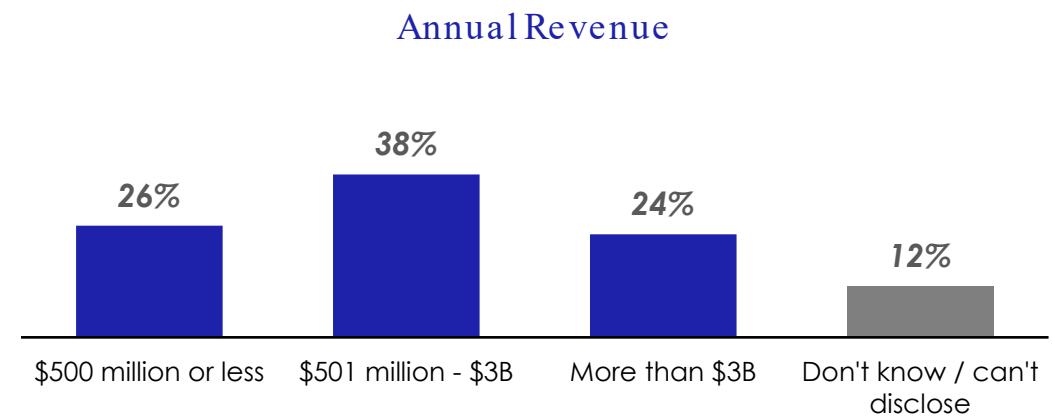
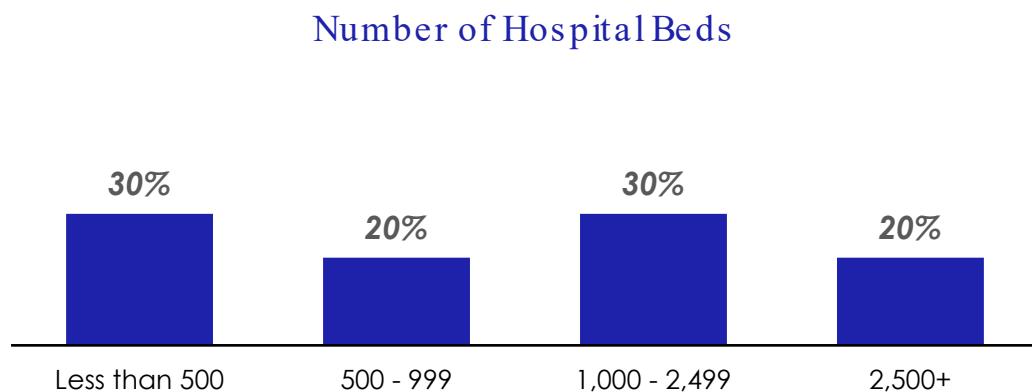
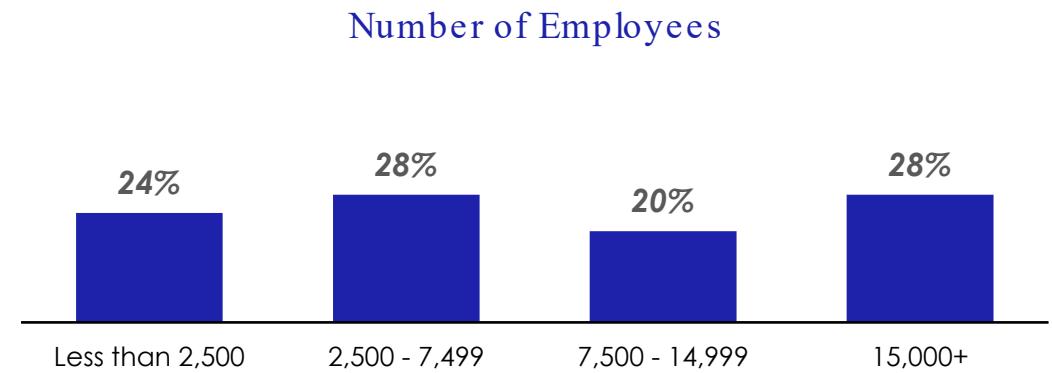
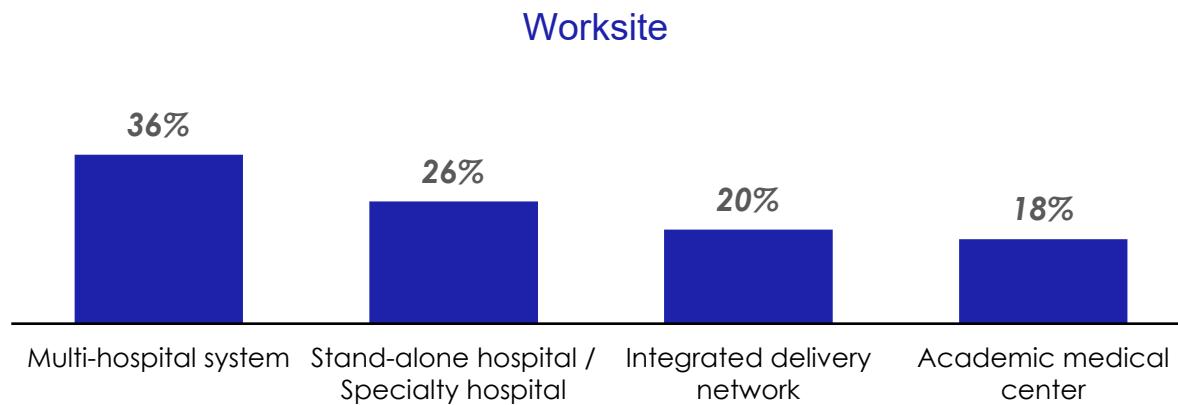
Role Regarding Long-term Information Technology Strategies and Investments



S2. How would you characterize your job function?
S3. What is your current role?

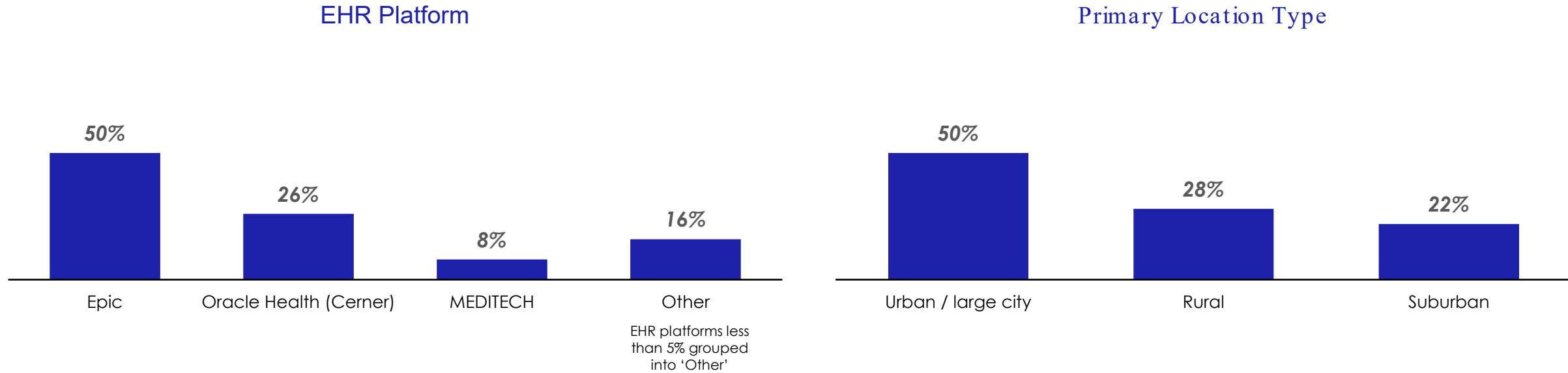
S4. Which of the following best describes your role regarding your organization's long-term information technology strategies and investments?
Base: Total Respondents; n = 50

Organizational Profile



S1. Which of the following best describes your worksite?
S9. Please tell us the total number of employees in your organization.
S7. Please tell us the total number of hospital beds in your organization.
S8. What is your organization's annual net revenue?
Base: Total Respondents; n = 50

Organizational Profile (cont.)

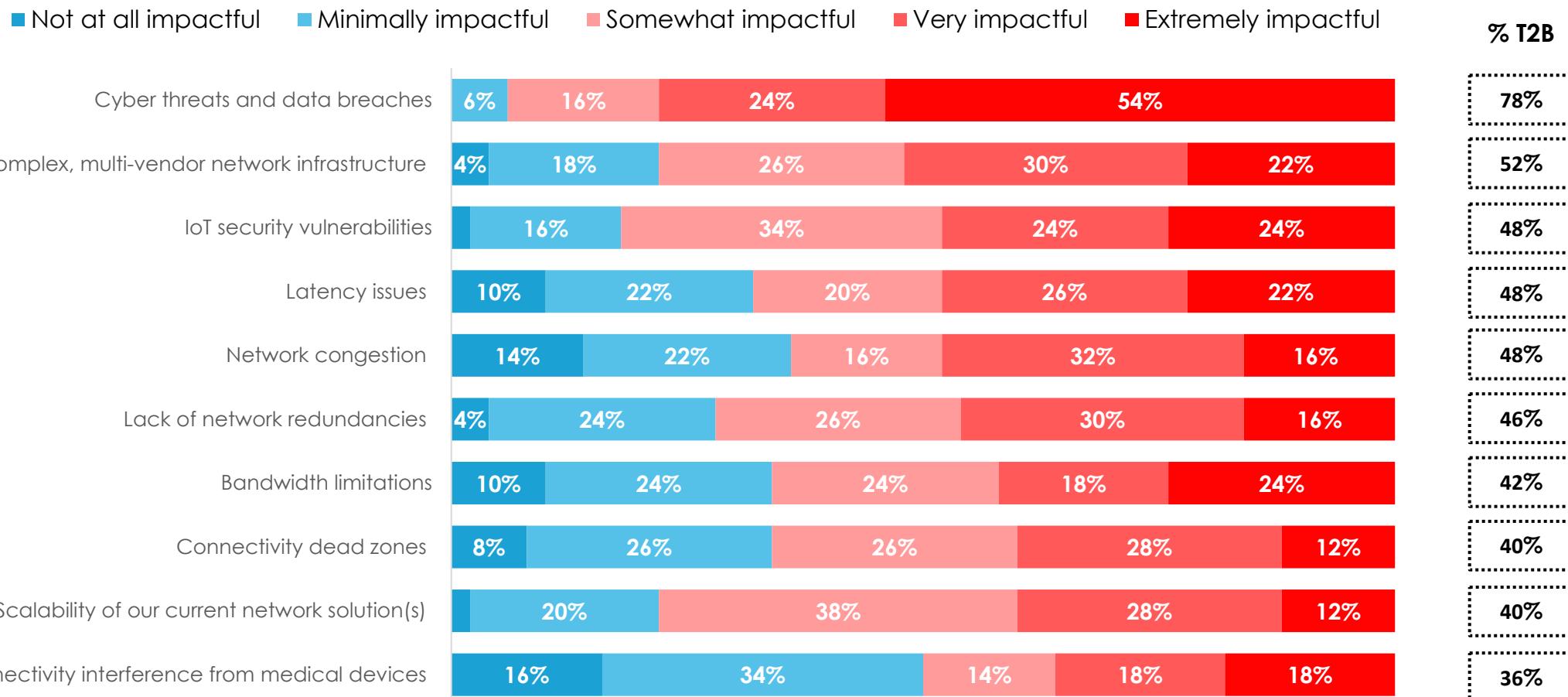


S5. What is your organization's primary EHR (electronic health records) platform?
S6. Which of the following best describes the location in which your health system / hospital operates? If there are multiple locations, please consider the primary place of business.
Base: Total Respondents; n = 50

Detailed Findings

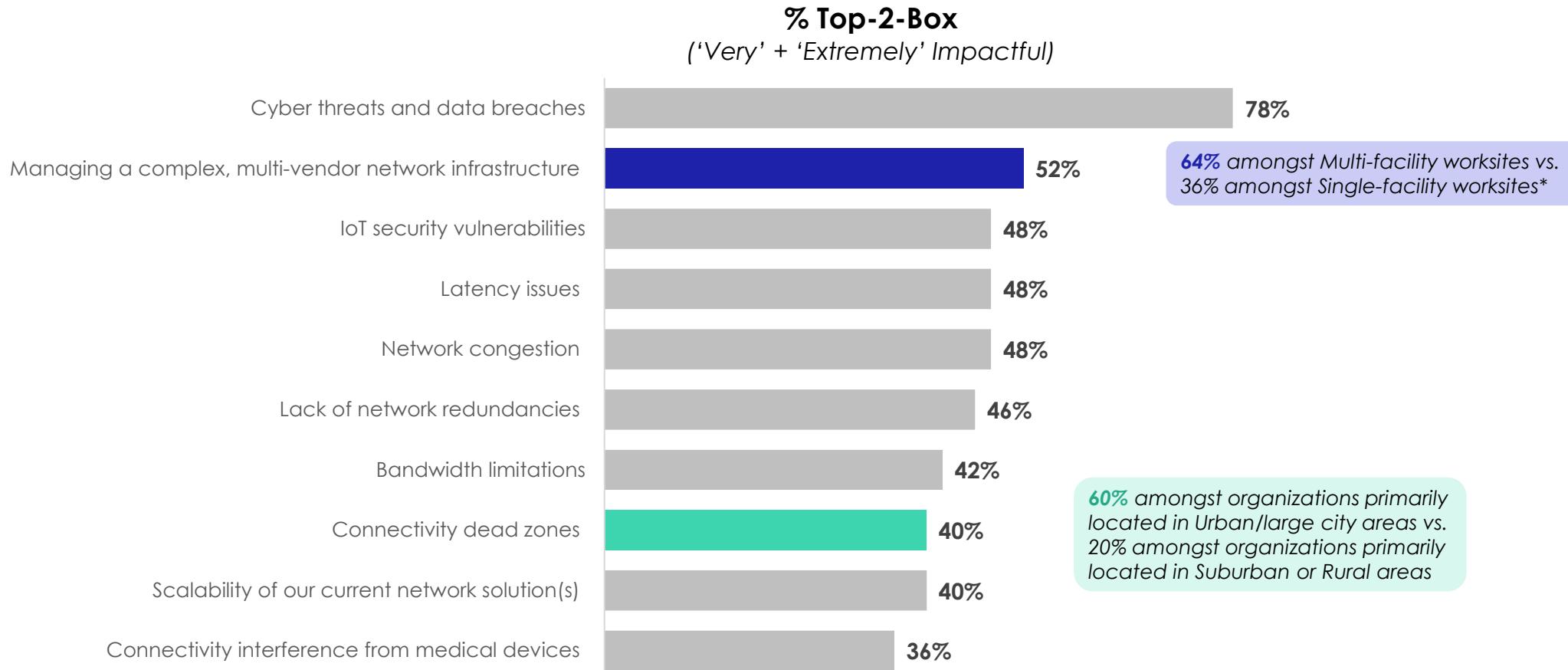
Cyber threats, data breaches, and managing a complex network infrastructure are most impactful to patient care when it comes to network reliability and performance challenges

To what extent do each of the following network reliability and performance challenges impact patient care for your organization?



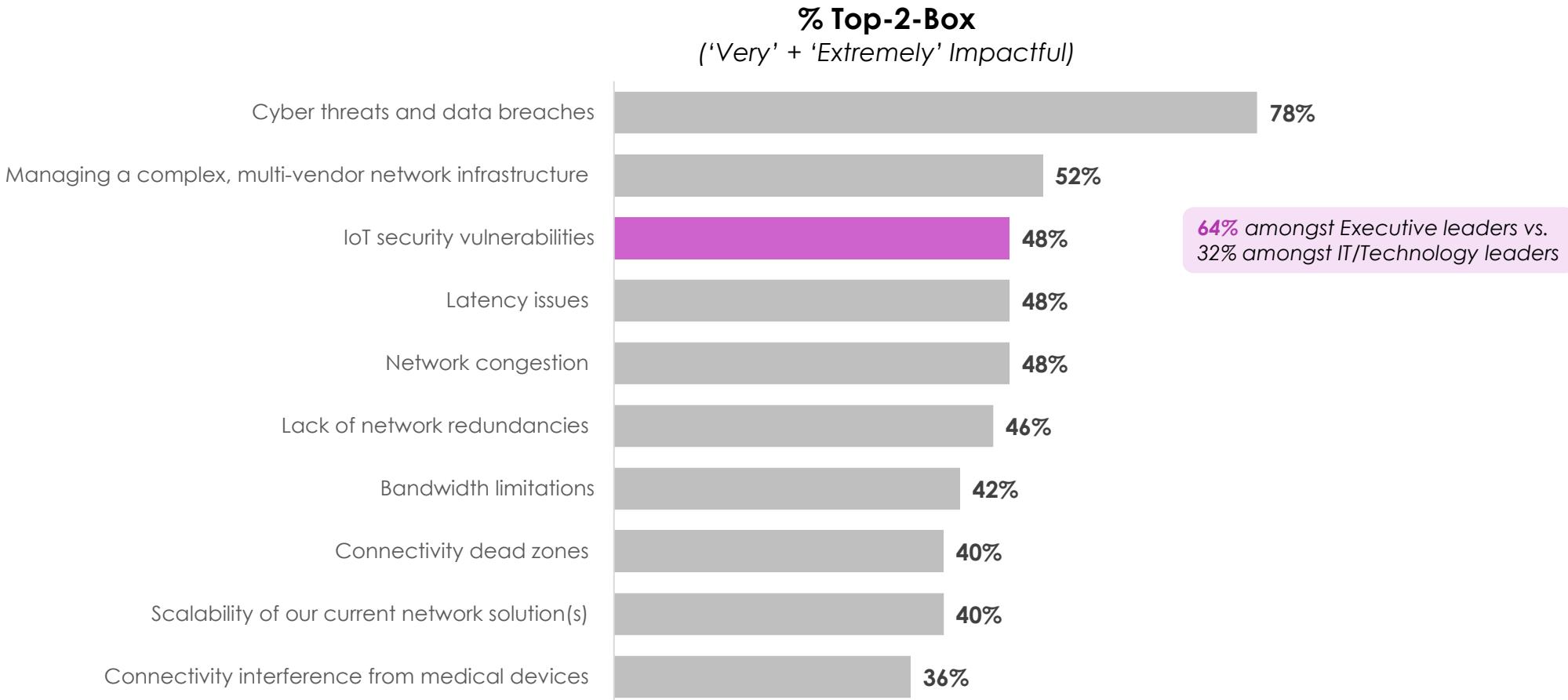
Those in multi-facility worksites are more likely to say network infrastructure complexities are highly impactful to patient care, and organizations in urban areas are more likely to report impacts from connectivity dead zones

To what extent do each of the following network reliability and performance challenges impact patient care for your organization?



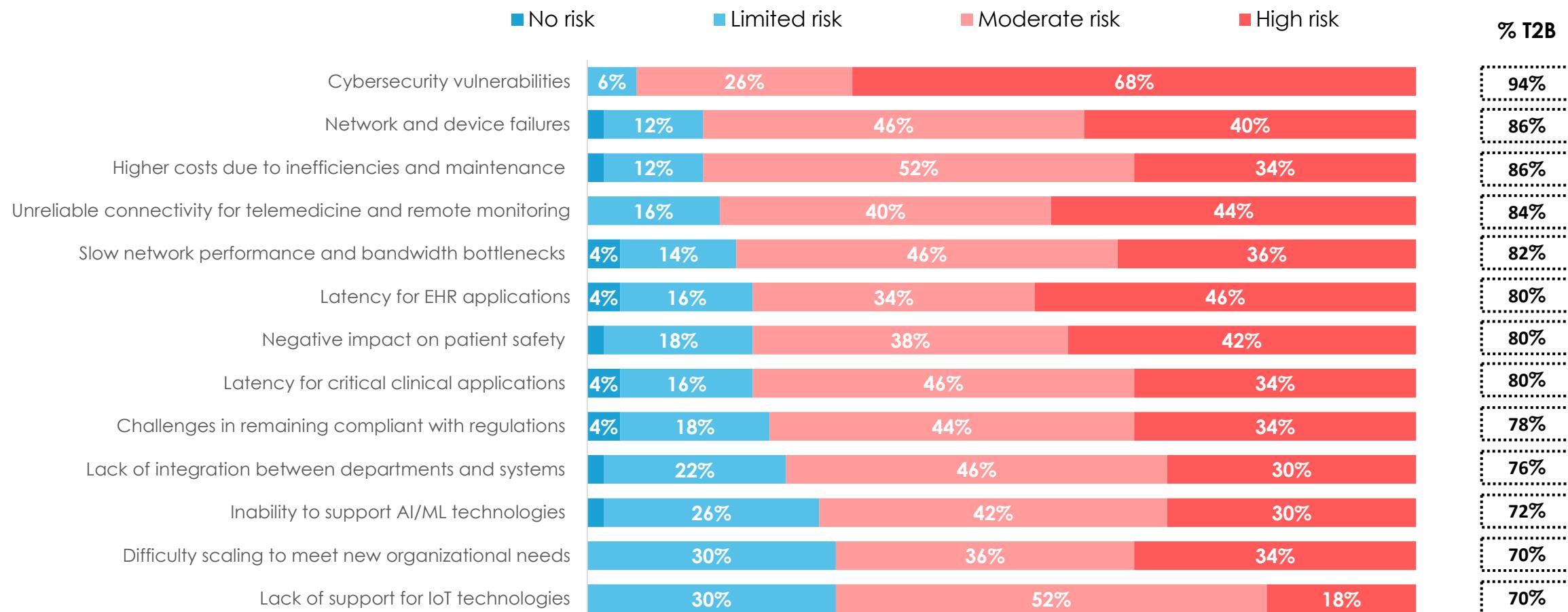
Executive leaders are twice as likely to deem IoT security vulnerabilities highly impactful to patient care

To what extent do each of the following network reliability and performance challenges impact patient care for your organization?



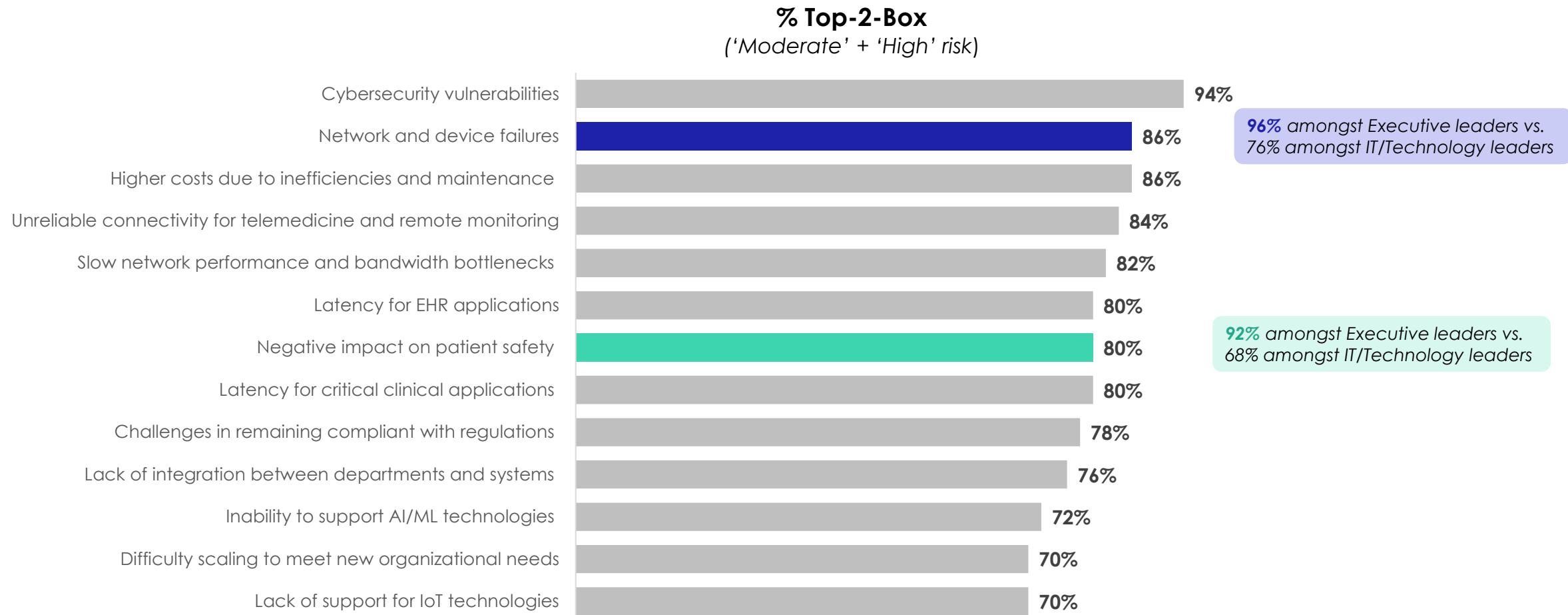
Cybersecurity vulnerability is the highest of many risks healthcare leaders say outdated networks can cause

To what extent do you believe each of the following are risks of healthcare organizations using outdated networks?



Executive leaders are more likely to consider network and device failures and negative impacts to patient safety as higher risk factors in using outdated networks

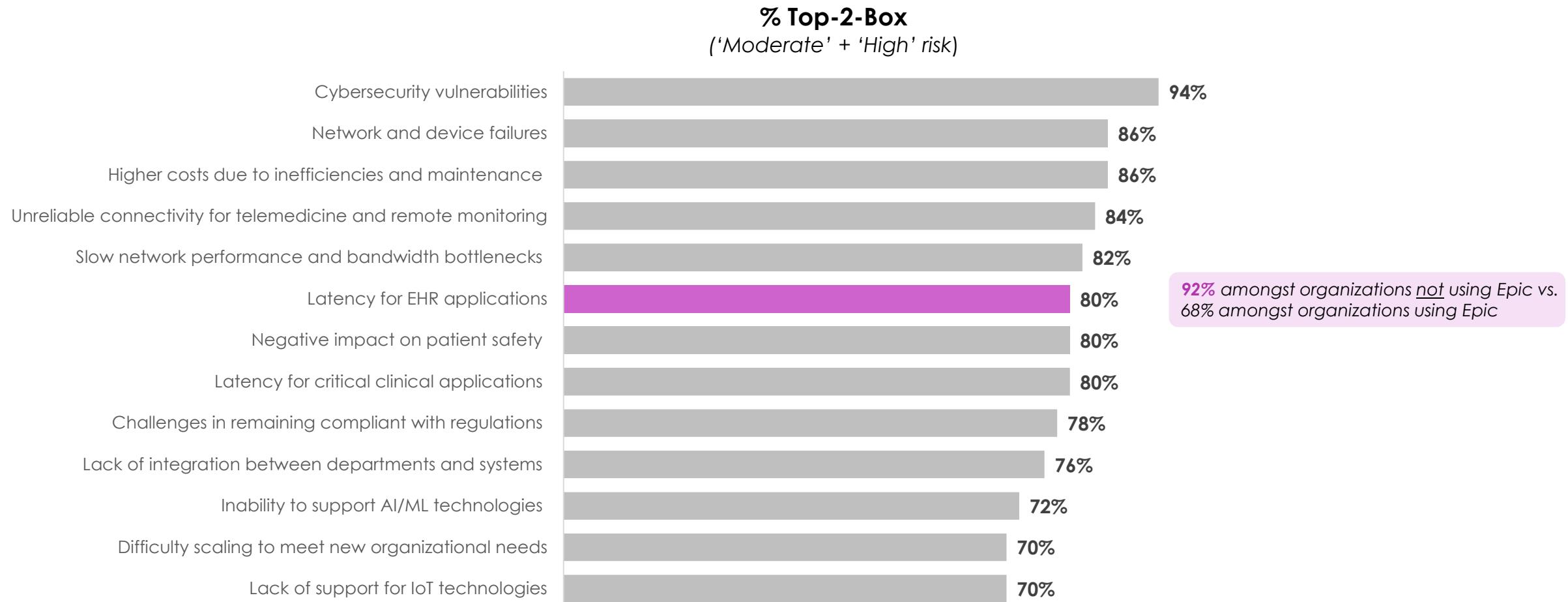
To what extent do you believe each of the following are risks of healthcare organizations using outdated networks?



Q2. To what extent do you believe each of the following are risks of healthcare organizations using outdated networks?
Base: Total Respondents; n = 50

Organizations using EHR platforms other than Epic are more likely to report latency for EHR applications as a higher risk

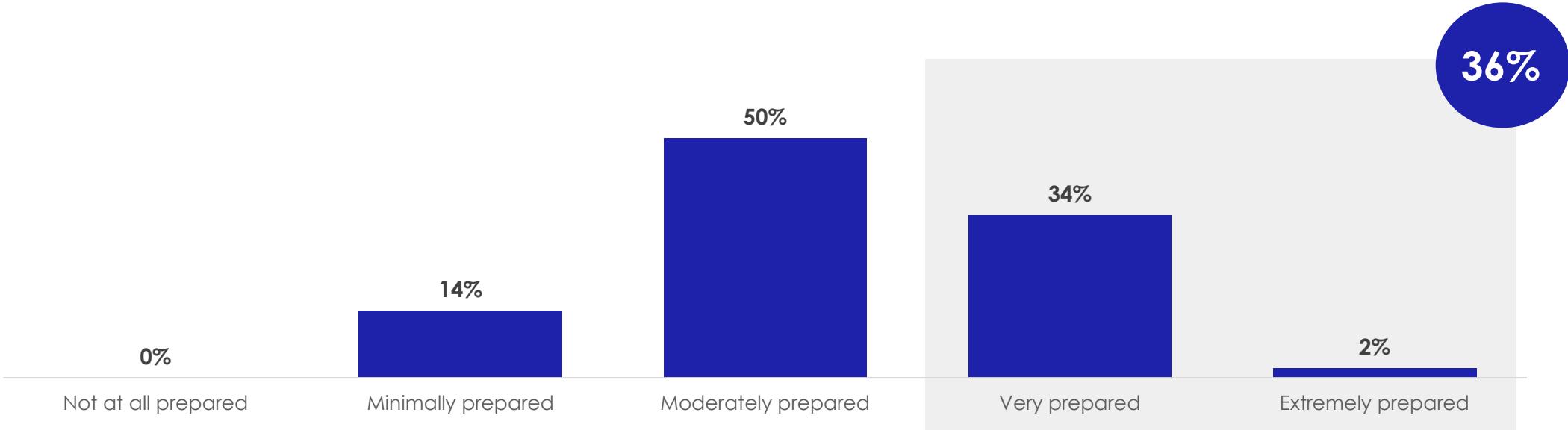
To what extent do you believe each of the following are risks of healthcare organizations using outdated networks?



Q2. To what extent do you believe each of the following are risks of healthcare organizations using outdated networks?
Base: Total Respondents; n = 50

Only a little over a third of healthcare leaders feel their network infrastructure is sufficient to handle upcoming increased connectivity demands associated with emerging technology adoption

As IoT and AI adoption in healthcare grows, how prepared is your organization's network infrastructure to support increased connectivity demands over the next 3-5 years?



Q3. As IoT and AI adoption in healthcare grows, how prepared is your organization's network infrastructure to support increased connectivity demands over the next 3-5 years?
Base: Total Respondents; n = 50

Around 3 in 5 healthcare leaders report financial impacts and limitations from outdated and long-term network contracts with high renewal costs and upgrades

Please indicate the extent to which you agree or disagree with each of the following.

■ Strongly disagree ■ Somewhat disagree ■ Neither agree nor disagree ■ Somewhat agree ■ Strongly agree

% T2B

Compared to a few years ago, the costs associated with maintaining our IT systems have risen significantly



92%

We are spending significantly more on IT innovation now than we were a few years ago



78%

Outdated network contracts with high renewal costs are one of the primary cost drivers of maintaining our IT/network infrastructure



62%

Long-term network contracts limit my organization's ability to cost-effectively upgrade our technology infrastructure



58%

The investment required to upgrade or scale our Distributed Antenna System (DAS) solution is a critical barrier to our ability to implement new technologies



54%

Gaps in wireless coverage have a significant financial impact on our organization's operations



50%

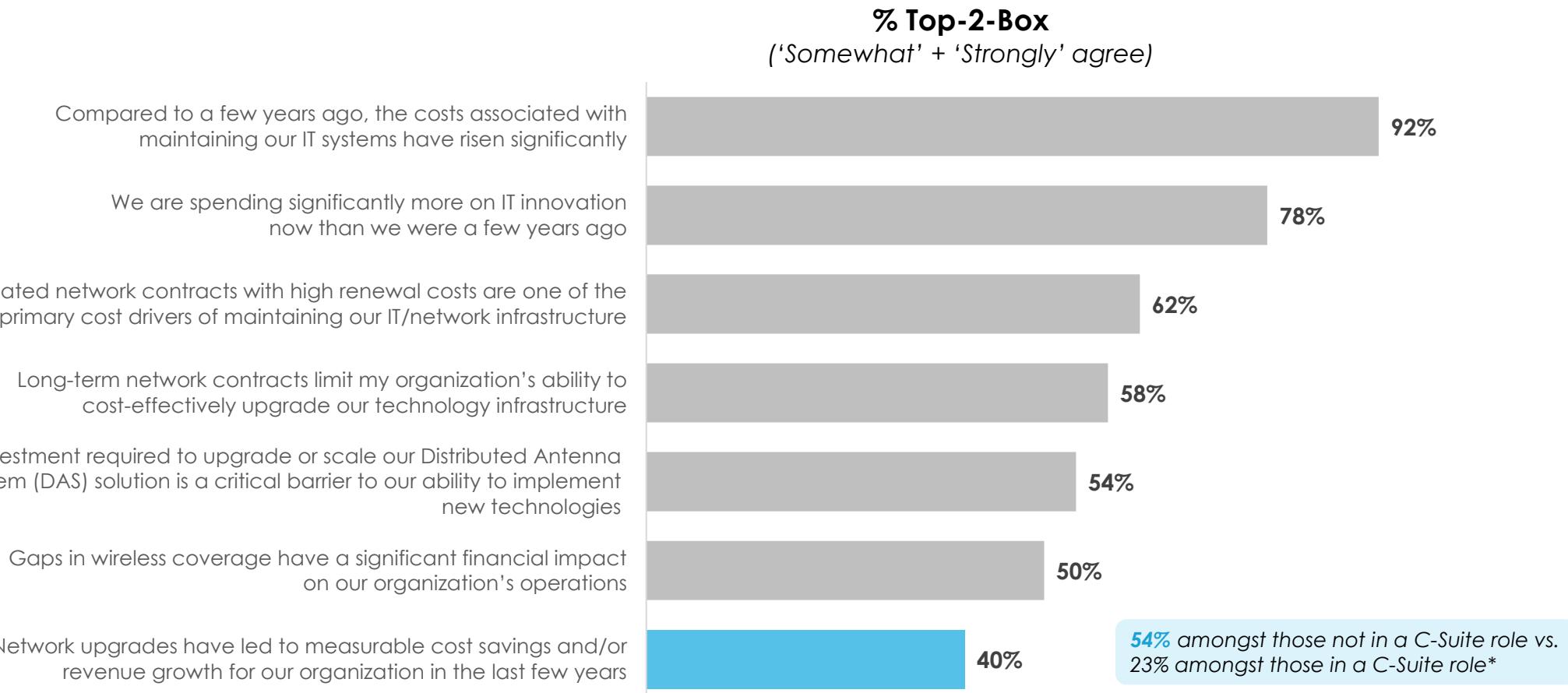
Network upgrades have led to measurable cost savings and/or revenue growth for our organization in the last few years



40%

Leaders in non-C-Suite roles are nearly twice as likely to feel that network upgrades have led to measurable cost savings and/or revenue growth

Please indicate the extent to which you agree or disagree with each of the following.



Q4. Please indicate the extent to which you agree or disagree with each of the following.
Base: Total Respondents; n = 50

More than half of leaders in healthcare say the Neutral Host Network solution could be a cost-saving and efficient opportunity for their organization, and have an interest in learning more



XYZ Neutral Host Network provides health systems' clinicians, patients, and staff with high-quality wireless network coverage across multiple mobile carriers. It is a flexible, scalable solution built on a shared wireless foundation, offering licensed spectrum and the option to add a Private Wireless Network – ensuring healthcare organizations can easily support their growing digital needs.

Please indicate the extent to which you agree or disagree with each of the following.

■ Strongly disagree ■ Somewhat disagree ■ Neither agree nor disagree ■ Somewhat agree ■ Strongly agree

% T2B

This type of solution sounds well-suited to the needs of my organization



64%

I would be interested in learning more about this network solution



54%

There is an opportunity for my organization to realize cost savings and efficiencies with a solution like this



52%

This solution sounds like it is designed to future-proof healthcare organizations



52%

I believe this network solution could solve a lot of the challenges my organization faces today



50%



Those in a C Suite to VP/Head role are more likely to believe the Neutral Host Network is well-suited to their organization's needs and say they'd like to know more about it



XYZ Neutral Host Network provides health systems' clinicians, patients, and staff with high-quality wireless network coverage across multiple mobile carriers. It is a flexible, scalable solution built on a shared wireless foundation, offering licensed spectrum and the option to add a Private Wireless Network – ensuring healthcare organizations can easily support their growing digital needs.

Please indicate the extent to which you agree or disagree with each of the following.

% Top-2-Box

(‘Somewhat’ + ‘Strongly’ agree)

This type of solution sounds well-suited to the needs of my organization

64%

77% amongst those in a C-Suite to VP/Head role vs. 50% amongst those in a Director or Manager role*

I would be interested in learning more about this network solution

54%

65% amongst those in a C-Suite to VP/Head role vs. 42% amongst those in a Director or Manager role*

There is an opportunity for my organization to realize cost savings and efficiencies with a solution like this

52%

This solution sounds like it is designed to future-proof healthcare organizations

52%

I believe this network solution could solve a lot of the challenges my organization faces today

50%



Key Takeaways

1

Cybersecurity and infrastructure complexity are the most impactful network challenges to patient care

IoT security vulnerabilities, latency issues, and network congestion were also cited as highly impactful to patient care by nearly half of healthcare leaders (48% each). Interestingly, organizations in urban or large city areas are three times more likely than those primarily located in suburban or rural areas to say connectivity dead zones create a significant impact (60% vs. 20%).

2

Leaders in healthcare agree that outdated networks pose risks in many critical areas

Cybersecurity vulnerabilities are deemed the highest risk (94%), followed by network and device failures (86%) and higher costs due to inefficiencies and maintenance (86%) to round out the top three. Executive leaders are more likely to report network and device failures (96% vs. 76% among IT/Tech leaders) and a negative impact on patient safety (92% vs. 68% among IT/Tech leaders) as significant risks of using outdated networks.

3

Around 3 in 5 organizations are experiencing significant financial impacts from outdated and long-term network contracts

Half also say that gaps in wireless coverage have a significant impact on their organization's operations. Nearly all executives and IT/tech leaders agree that the costs of maintaining their IT systems have risen significantly in the past few years (92%), with 78% saying they are now spending significantly more on IT innovation than they were a few years ago. But upgrades are needed – only 36% say their network infrastructure is fully prepared to support the increased connectivity demands associated with IoT and AI adoption over the next 3 to 5 years.

4

Nearly 2 in 3 healthcare leaders say a Neutral Host Network solution sounds well-suited to their organization's needs

This is especially true among those in a C-Suite to VP/Head role (77% vs. 50% among director or manager roles), who are also more likely to express interest in learning more about such a solution (65% vs. 42% among director or manager roles). Additionally, 52% agree an NHN solution could present an opportunity to realize cost savings and efficiencies for their organizations.

Thank You



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