



# Sandpiper Global Reputation Capital Index

MANAGING REPUTATION  
IN THE  
**Health & Wellness**  
INDUSTRY

SCORE CATEGORY  
EXCELLENT

POOR  
FAIR

FEBRUARY 2025



# Inform. Create. Shape.

About The Reputation Capital Index and Profiles of Respondents	<b>03</b>
At a Glance: Reputation Capital in the Health Sector	<b>04</b>
Key Stats from Health Sector Leaders	<b>05</b>
Part One: Global Reputation Capital Index	<b>08</b>
Part Two: How Reputational Risks and Weaknesses are Impacting Organisations	<b>11</b>
Part Three: Investment is Increasing	<b>12</b>
Part Four: Key Takeaways for Health Leaders	<b>13</b>
About Sandpiper	<b>14</b>



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# About The Reputation Capital Index and the Health Sector

Today, reputation management is more complex than ever. Organisations are beset by issues and risks, and constantly looking to do more with less in uncertain economic circumstances. They are operating in a world that is paradoxically more connected yet deeply divided.

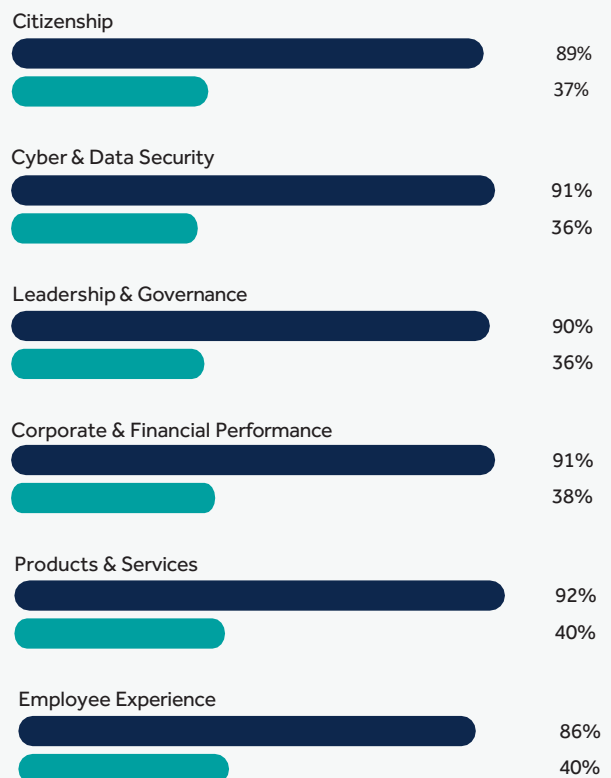
Leaders in the health sector surveyed globally for our inaugural **Sandpiper Global Reputation Capital Index** are keenly aware of the importance of reputation, with 97% rating it as important for commercial success. However, only around one quarter of leaders in this sector thought their organisation is strong in most pillars of reputation. Furthermore, 50% of healthcare leaders note that reputation is becoming harder to manage.

We wanted to understand this mismatch between recognition and action.

The data for this report was collated from a survey of over 2,700 CEOs, other C-suite Leaders, and Corporate Affairs leaders, of whom 148 were health sector leaders. All those surveyed are based in the global headquarters of their organisations across 27 markets in six continents.

## Health leaders recognise the importance of reputation, but few are confident about their organisation's strength in any reputation pillar

● Perceived as important ● Strong rating for own institution



## At a Glance: Reputation Capital in the Health Sector

Based on their responses to 51 separate variables across the nine areas of reputation management studied, and using a 1-100 point scale, we have grouped health respondents into four performance-based categories: **Trailblazers** (12%), **Aspirants** (54%), **Followers** (32%), and **Beginners** (3%).

Compared with other sectors, Health leaders are less likely to be in the **Trailblazing** group (3% vs 12% overall), but more likely to be in the following **Followers** group (54% vs 32% overall).

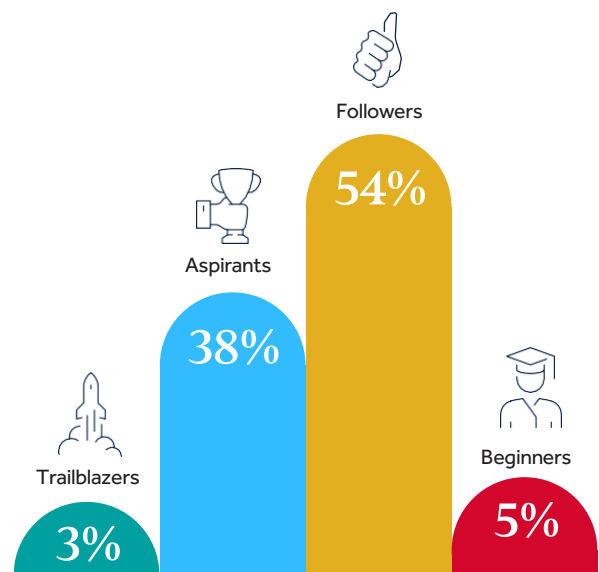
The Index assesses performance based on nine areas of reputation management: **Reputation Strategy, ESG & Sustainability Strategy, Crisis & Issues Management, Executive Profiling & Thought Leadership, Media Engagement, AI & Digital Environment, Employee Communications, Financial Communications, and Government & Regulatory Affairs.**

The findings allow us to examine performance in each area of reputation management, and to create an overall global picture of reputation management practices and health. We hope the Index can help organisations assess their own capabilities, understand how their performance compares to global and sector peers, and ultimately use it to support decision-making around where to invest time and resources.

While 70% of health sector respondents rated all of these areas of reputation management as important, only 30% self-rated their own organisations as strong in these. This strategy-to-action gap is a consistent theme observed throughout the study findings.

A lack of reputational strength can have real impacts in the health sector. Over three quarters (78%) of leaders in the health sector global say reputational weaknesses have negatively impacted their organisations in some way in the past 12 months, which is a higher proportion than the overall global average (72%).

Despite the number of challenges observed, these appear to be recognised, with more than six out of 10 health leaders saying their organisation plans to increase investment in each area of reputation management over the coming 12 months.



- **Trailblazers** (scored 75 to 100 points) have a strong grasp of reputation management and rate their ability to execute on essential tasks highly.
- **Aspirants** (scored 50 to 74 points) score highly but inconsistently, falling behind Trailblazers in at least one area of reputation management.
- **Followers** (scored 25 to 49 points) have a mixed ability to execute in reputation management, performing some tasks well but others poorly.
- **Beginners** (scored 0 to 24 points) lack the basic skills and conceptual knowledge for reputation management and rate their ability to execute as low.



# Key Stats from Health Sector Leaders

## Reputation management landscape

**97%** believe **reputation is important** for commercial success.

**50%** feel reputation is **becoming more difficult to manage**, with **20%** saying it is becoming easier.

**78%** experienced **negative business impacts due to reputational weak spots** over the past year.

**>90%** are **concerned about a range of emerging reputational risks**: misinformation and disinformation, data privacy and cybersecurity, employee activism, stakeholder and customer activism, DE&I, media consolidation, and ESG scrutiny and greenwashing claims.

Respondents placed fairly even levels of importance on each of the reputation pillars studied:



Corporate & Financial Performance



Products & Services



Employee Experience



Leadership & Governance



Cyber & Data Security



Citizenship

**>70%** rate **all pillars of reputation as important**, yet **<30%** rate their organisations as strong in these.

**79%** believe their **headquarters' geographic location** positively influences their **organisation's reputation**.

**44%** of **CEOs globally feel a high level of responsibility** for their organisation's reputation, yet only **24%** of Corporate Affairs leaders do.

While **<30%** have **strong access to stakeholder and audience insights**, those who do score significantly better in influencing and managing audience and stakeholders expectations.

**75%** believe all of the **nine areas of reputation management** we studied are **important**, yet **27%** rate their organisation as strong in these.

**>60%** **plan to increase investment** in each reputation management area over the next year.

**<25%** feel they **receive strong advice** across all areas of reputation management.

# Performance categories

## Reputation Strategy

**<40%** have a corporate narrative that is clear, differentiated, compelling, effective, accurate, or that is highly aligned with the organisation's vision, mission, values, or purpose.

Just **42%** believe key stakeholders and audiences have high awareness and understanding of their corporate narrative and key messages.



## ESG & Sustainability Strategy

**<40%** of organisations in the sector have a sustainability or ESG strategy or targets, and only **11%** (compared with 13% across all sectors) have a dedicated internal team in this area.

Only **25%** have a climate communications strategy and only **9%** have climate comms messaging.



## Crisis & Issues Management

**50%** have a crisis & issues management plan, but only **32%** are very confident about using it.

## Executive Profiling & Thought Leadership

**88%** say thought leadership activities have been effective in helping to build trust.

**84%** believe their organisation has clear thought leadership topics and themes, but only **30%** feel their organisation is recognised as an industry thought leader.



## Media Engagement

**68%** of health sector leaders believe they are not engaging with media enough.

While **73%** say media training is effective, only **30%** make it mandatory for all spokespeople. As a result, **64%** believe the quality of their spokespeople could be improved and **66%** say they do not always represent their organisation accurately.

The sector appears to be struggling with effective media engagement, with **69%** believing journalists do not portray their organisations accurately, or treat them fairly at **63%**.



# Performance categories

## AI & Digital Environment

The highest-ranking digital reputation activities for organisations are **SEO optimisation (45%)**, **social media advertising (40%)**, and **content creations and publication (30%)**.



Only **24%** believe they have a strong understanding of how generative AI tools are interacting with and influencing a range of digital reputation issues including low digital content.

**>80%** are experiencing search-ranking issues, misinformation and disinformation, quality control of AI-generated content, and manipulated media and deepfakes.

## Employee Communications



Organisations are using multiple different channels (**>11 on average**) to engage employees, including digital, social, in-person and more.

Only **31%** say their Communications and Human Resources teams are highly aligned around employee engagement strategies.

Only **30%** say their employees have a strong understanding of how their role contributes to the corporate strategy.



## Financial Communications



Only **32%** believe their organisation's value is well understood by investors, and **34%** say they have been highly effective in communicating financial results.

Just **28%** are very satisfied with their performance in raising capital.

## Government & Regulatory Affairs



**96%** have attempted some form of stakeholder mapping, and **31%** have a comprehensive approach.

**76%** believe their policy engagement activity is insufficient.

**75%** say a lack of influence and relationships with stakeholders has negatively impacted their business in the past 24 months.



## Part One: Global Reputation Capital Index

Reputation plays a strong role in the health sector, with 59% of leaders surveyed noting that it is 'very important' to their organisation's commercial success. Additionally, over two in five (40%) consider themselves to be Trailblazers in their industry.

Crisis management has scored highly – with the highest number of trailblazers in the industry in comparison to other reputation components, as leaders attested to their organisations' resilience in the face of evolving issues in the sector.

Health leaders did note some trepidation about their performance in the AI & digital environment, scoring just below the global average. In fact, when it comes to cyber and data security, only 36% said their reputation was 'strong'.

Cybersecurity and data privacy incidents presented itself as a key concern to health leaders, with 97% expressing concern. Yet, health leaders were less likely to rate themselves as highly prepared to deal with the concern, compared to the global average.

With widespread employee databases and patient information to protect, this is likely to be an area of investment in the future. 54% of our respondents noted that they would be making a moderate to large increase in AI integration in the next 12 months, while 68% noted they would be investing more in their digital footprint and profile.



# Healthcare performance versus global averages

● Healthcare Sector ● Overall Sector Average

## Reputation strategy



## Executive profiling & thought leadership



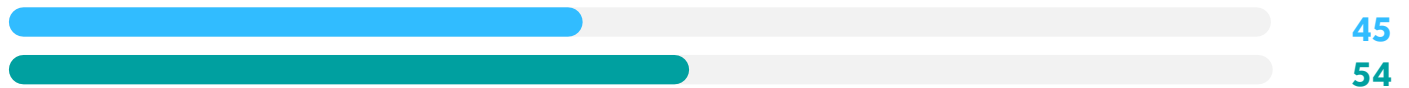
## Media engagement



## Government and regulatory affairs



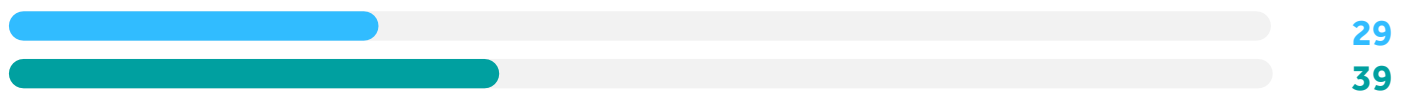
## AI & Digital Environment



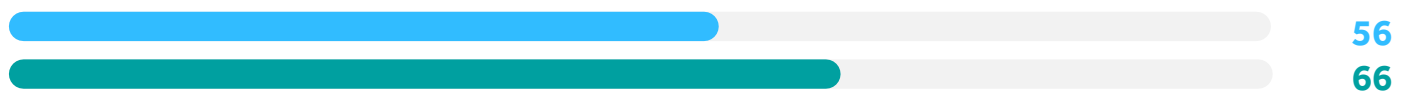
## Employee communications



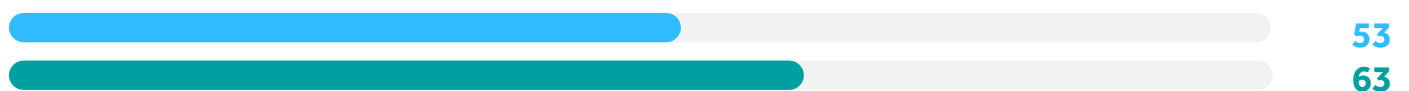
## ESG & sustainability strategy



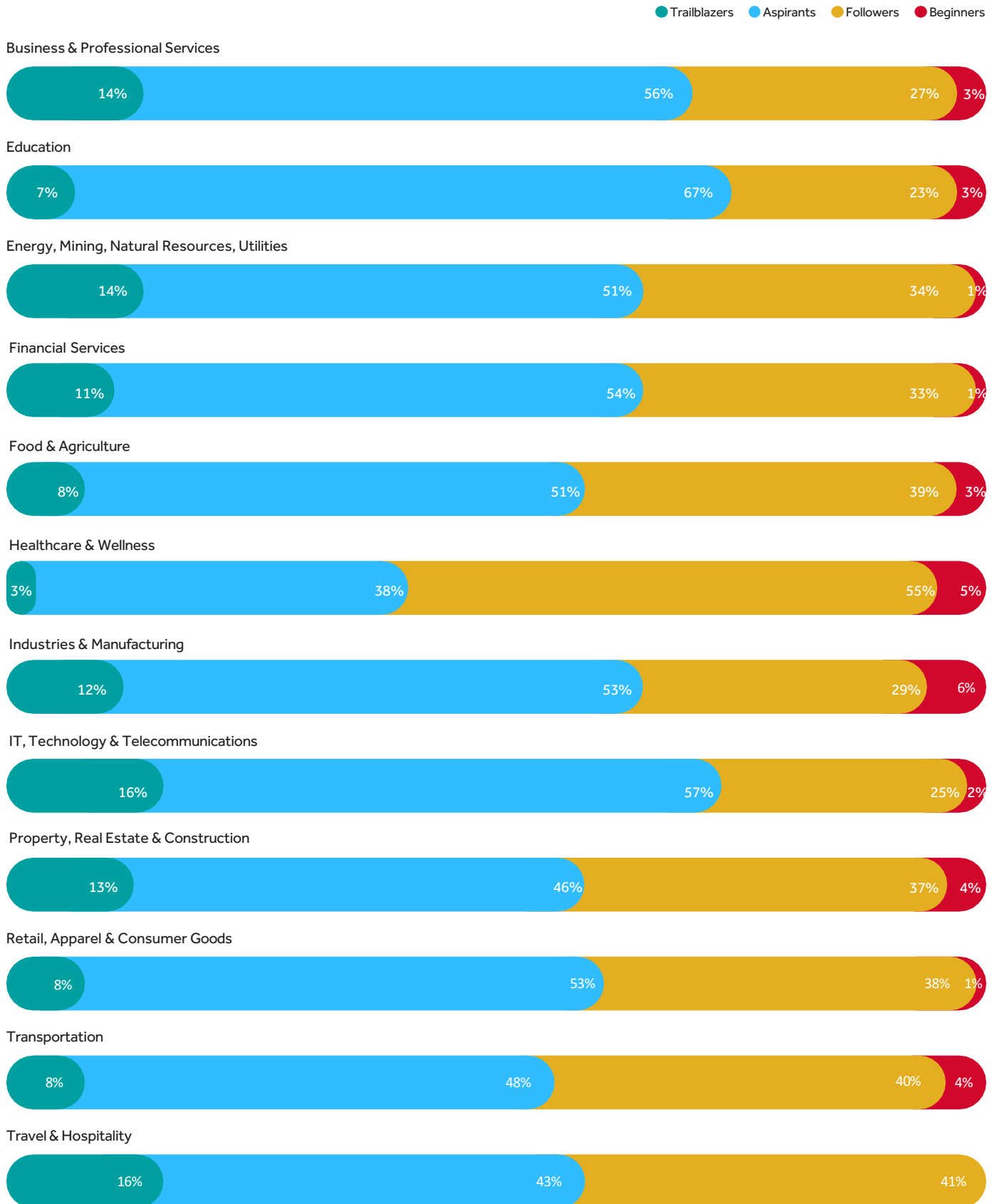
## Crisis management



## Financial communications



## % in each performance category by industry



## Global healthcare sector % in each performance category

Trailblazers Aspirants Followers Beginners

### Overall



### Reputation Strategy



### ESG & Sustainability Strategy



### Crisis Management



### Executive Profiling & Thought Leadership



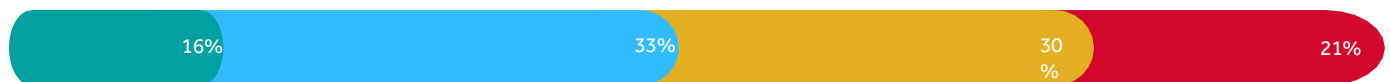
### Media Engagement



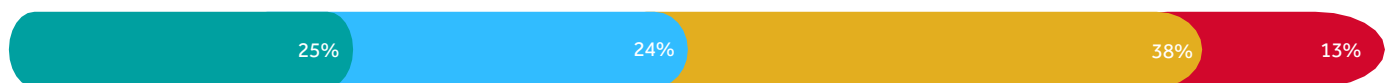
### AI & Digital Environment



### Employee Communications

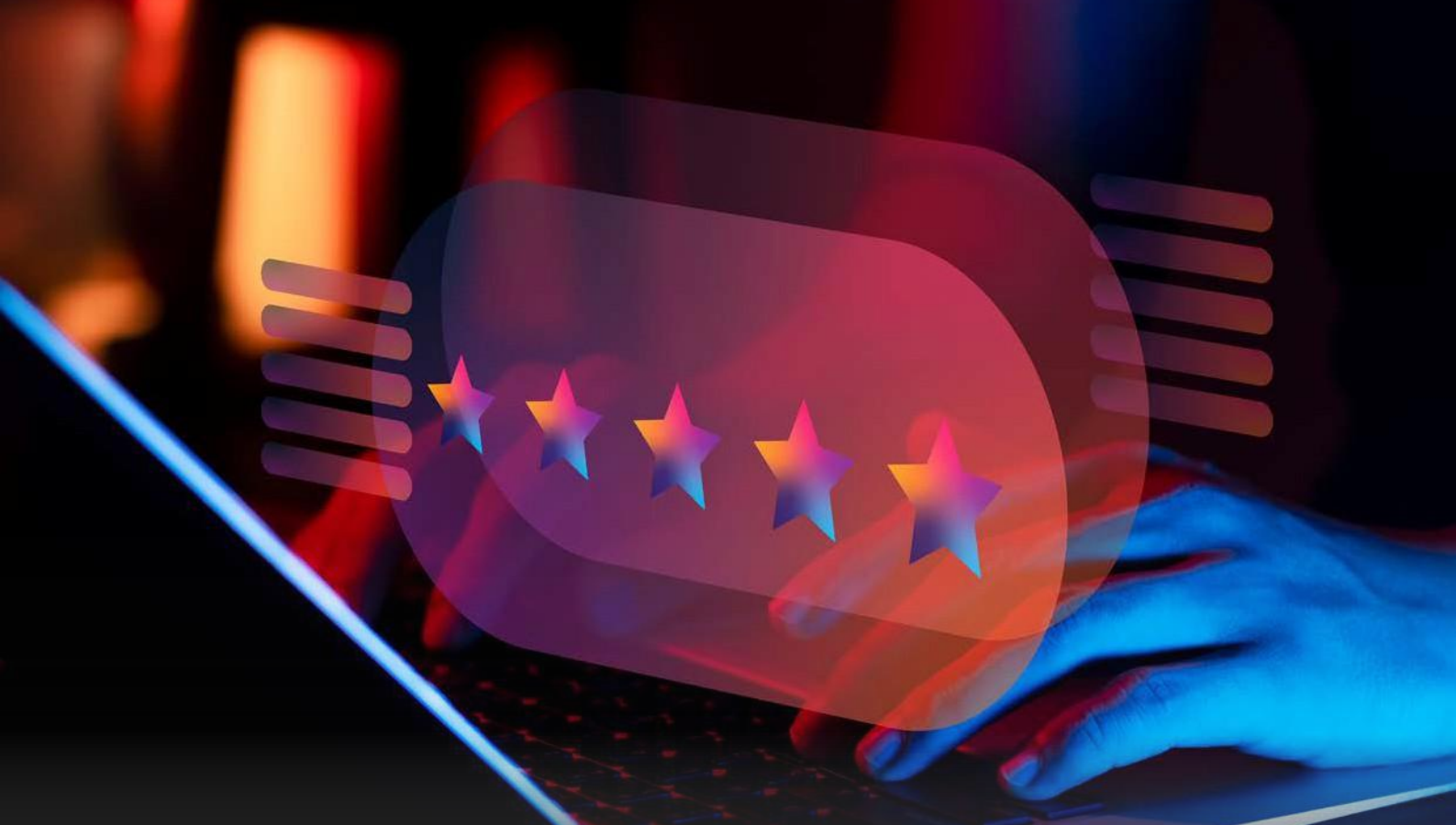


### Financial Communications



### Government & Regulatory Affairs





## Part Two: How reputational risks and weaknesses are impacting organisations

### Reputational weaknesses impact business performance

More than three in four (78%) leaders in the healthcare sector surveyed say they have experienced at least one form of negative business impact owing to reputational weak spots over the past 12 months.

These impacts are varied and have affected a wide range of stakeholders, including customers, current and future employees, and government or regulatory stakeholders. The specific impacts experienced were around their organisation's ability to do business with customers (55%), ability to attract and retain talent (50%), ability to recover from a crisis (63%), incurring financial losses (54%), and negatively impacting government and community relationships (57%).

A direct correlation is seen between performance and impact, with those scoring highest in the Index overall also scoring highly in Reputation Strategy. Only half (47%) of Trailblazers for Reputation Strategy faced negative business impacts from lack of reputational strength over the same time period – 25 points below the overall global average. By comparison, Aspirants, Followers, and Beginners in the same area were up to 10 points more likely to face negative consequences from negative reputation across categories.

### Most institutions unprepared to tackle new threats

As reputational risks increase and the environment for audience engagement becomes more fragmented, 50% of leaders in the healthcare sector believe that reputation is becoming more difficult to manage, with just 20% saying it is getting easier.

Many of the new emerging threats stem from technology – from AI to misinformation and disinformation, which will only increase as technology continues to develop at pace in the coming years. Several other areas of risk are connected to core values, including sustainability and DE&I.

Despite acknowledging the potential impact of key reputation-related issues on their companies, most leaders do not feel prepared to manage these. In fact, a significant gap exists between levels of concern and taking action to prepare.

For nearly every emerging risk we asked leaders about, almost seven in ten feel concerned but unprepared to manage it.

Cybersecurity and data privacy (72 pt gap), employee activism (71 pt gap), and greenwashing regulation (70 pt gap) top the list, indicating a need for immediate attention toward these areas.

## Part Three: Investment is Increasing

As reputation is viewed as a key driver of commercial success amid a growing risk landscape, so investment in reputation management is forecast to increase.

Most healthcare leaders plan to make at least some level of investment in several reputation management functions over the next year. Fewer than 20% of healthcare leaders said they would decrease their investments in any category of reputation management.

Healthcare leaders are most likely to increase their investments in CEO profile, highlighting the desire to enhance the strategic vision within the healthcare sector, particularly as less than half (41%) of leaders cited their CEO as the clear owner of their organisation's reputation strategy.

Executive/leadership team profile (72%) was another top focus. With the greatest percentage of trailblazers in the industry represented in the pillar of crisis management, increased investment into executive/leadership team profiling can help continue to effectively guide the industry through any changes.

### Most Health leaders expect to spend more on each aspect of reputation compared with last year

	Global Healthcare	Americas	APAC	Europe	Middle East & Africa
Reputation management strategy	72%	81%	80%	74%	94%
CEO profile	75%	80%	77%	73%	91%
Executive / leadership team profile	72%	80%	75%	68%	93%
Media profile and relationships	64%	77%	76%	69%	92%
Community engagement	67%	74%	75%	67%	90%
Digital footprint and profile	68%	69%	71%	65%	91%
(generative) AI integration	66%	76%	75%	66%	90%
Employee engagement / sentiment	64%	76%	77%	68%	90%
ESG and sustainability performance and communications	64%	80%	75%	69%	92%
Crisis and issues communications preparedness	61%	75%	77%	68%	91%
Financial reporting / results	67%	75%	75%	70%	91%
Investor / shareholder relations	58%	76%	76%	67%	91%
Reputation measurement	69%	80%	77%	68%	93%



## Part Four: Key Takeaways for Healthcare Leaders

### **Now is the time for Healthcare leaders to lead**

Only 3% of healthcare leaders' organisations rank as Trailblazers, the lowest percentage of any industry. While there were areas where Healthcare leaders performed well in the index (crisis & issues, reputation management strategy, financial communications, etc.), there is more work to be done to improve the reputation management functions of healthcare institutions. All leaders in this sector should assess how they perform against the Reputation Capital Index, and focus their investments on improving capabilities.

### **Managing reputation among diverse stakeholders is key**

Healthcare sector leaders are planning to increase investments in employee engagement/sentiment and community engagement, highlighting how important stakeholders are to their success. Creating a full stakeholder map, researching audiences' insights, and tailoring messaging to resonate with diverse audiences should be central to Healthcare reputation management strategies.

### **Planning for sector-specific issues must be a priority**

There is a widespread need within the healthcare sector to uplevel preparedness for data and cybersecurity threats. Given the prominence of these issues in today's landscape, and the sensitivity of the data they handle, better preparedness for sector-specific issues will help to safeguard reputation in increasingly complex times.

### **Opportunities for improved media relations and digital communications**

Digital footprint and media profile and relationships are two of the areas where healthcare leaders rank lower in the index than other sectors. The majority of leaders think their top executives should be engaging with the media more, which requires training. In addition, almost half of leaders see the need to do more on digital channels, prioritizing SEO and social media advertising in particular. Having a strong external communications plan and leadership buy-in is key to growing reputation in these areas.

# About Sandpiper

Sandpiper is an award-winning strategic communications and public affairs consultancy based in Asia Pacific and operating globally.



**We use our shared experience to make sense of the challenges our clients face in times of change.**



**We draw on rich, data-driven insights and research to inform our advice and deliver measurable value.**



**We work as a single, global team, with one P&L. This allows us to serve our clients flexibly wherever they are in the world.**

Our team are trusted advisors to industry leaders and market disruptors. We combine strong regional market understanding with global perspectives.

Our deep specialist knowledge in the **technology, finance, health, professional services, consumer brands, and energy and environment** sectors ensure we understand the challenges our clients face, can think creatively about their issues, and shape communications to achieve their business goals.

In 2023 and 2024 Sandpiper was awarded [Specialist Consultancy, Sandpiper Energy, Environment and ESG Practice](#) at the Public Relations & Communications Association (PRCA) APAC Awards 2024, [Large Agency Certificate of Excellence](#) by PRWeek Best Places to Work Asia Pacific 2023, [Large Consultancy of the Year](#) by the Public Relations & Communications Association (PRCA), [Large Consultancy of the Year](#) by PR Awards Asia Pacific 2023, and [Midsize Agency of the Year](#) by PRovoke Media SABRE Awards Asia Pacific 2023.





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