TRAVEL RISK OUTLOOK 2020

INTERNATIONAL SOS

QUESTIONS & PRESENTATION

Participants will be muted throughout.

Please write any questions you have in the ‘questions’ box anytime during the presentation. We will answer as many questions as we can at the end.

You will be sent:

- A set of the slides
- A recording of the webinar

AGENDA

- Research and framework introduction
- 10 predictions for 2020
- Panel discussion
- Audience Q&A

TRAVEL RISK OUTLOOK 2020

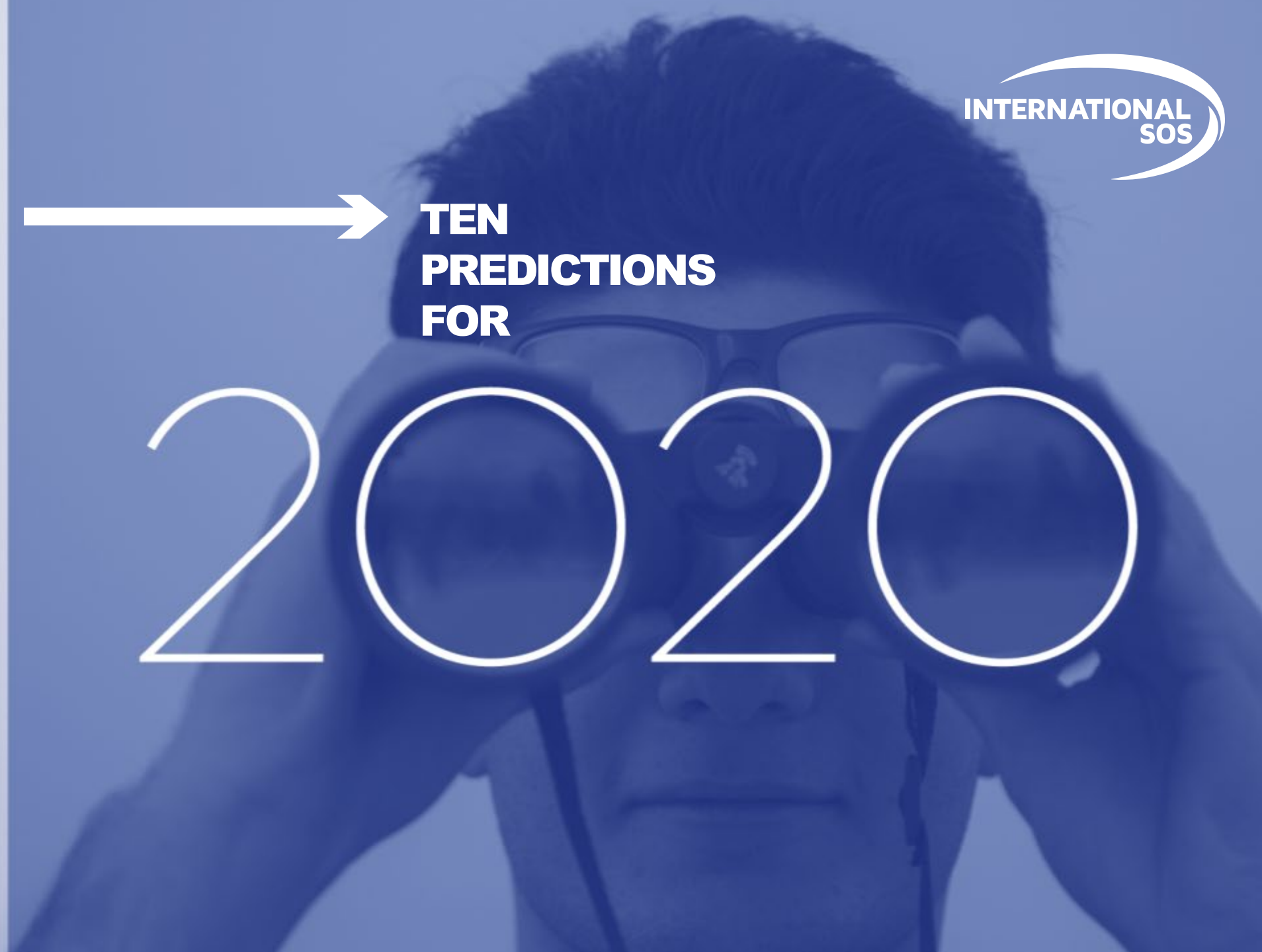
INTERNATIONAL SOS

UPDATED TRAVEL RISK MAP

FIVE RESEARCH PILLARS

- Travel Risk Management Council views
- Business Resilience Trends Survey
- Country/Region Medical & Security Risk Ratings
- Travel Risk Incident Case Data
- On-the-ground Medical and Security Intelligence

TEN PREDICTIONS FOR 2020



TRAVEL RISK MANAGEMENT COUNCIL

MARC BURROWS
Head of Global Mobility Services
KPMG

WILLIAM WITHAM
CEO
Australia-Africa Minerals & Energy Group

PAULENE CHONG
HR Manager
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JUDY KUSZEWSKI
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President
International Commission on Occupational Health (ICOH)

FRANCK BARON
Chairman
PARIMA

NICK PAHL
CEO
Society of Medicine

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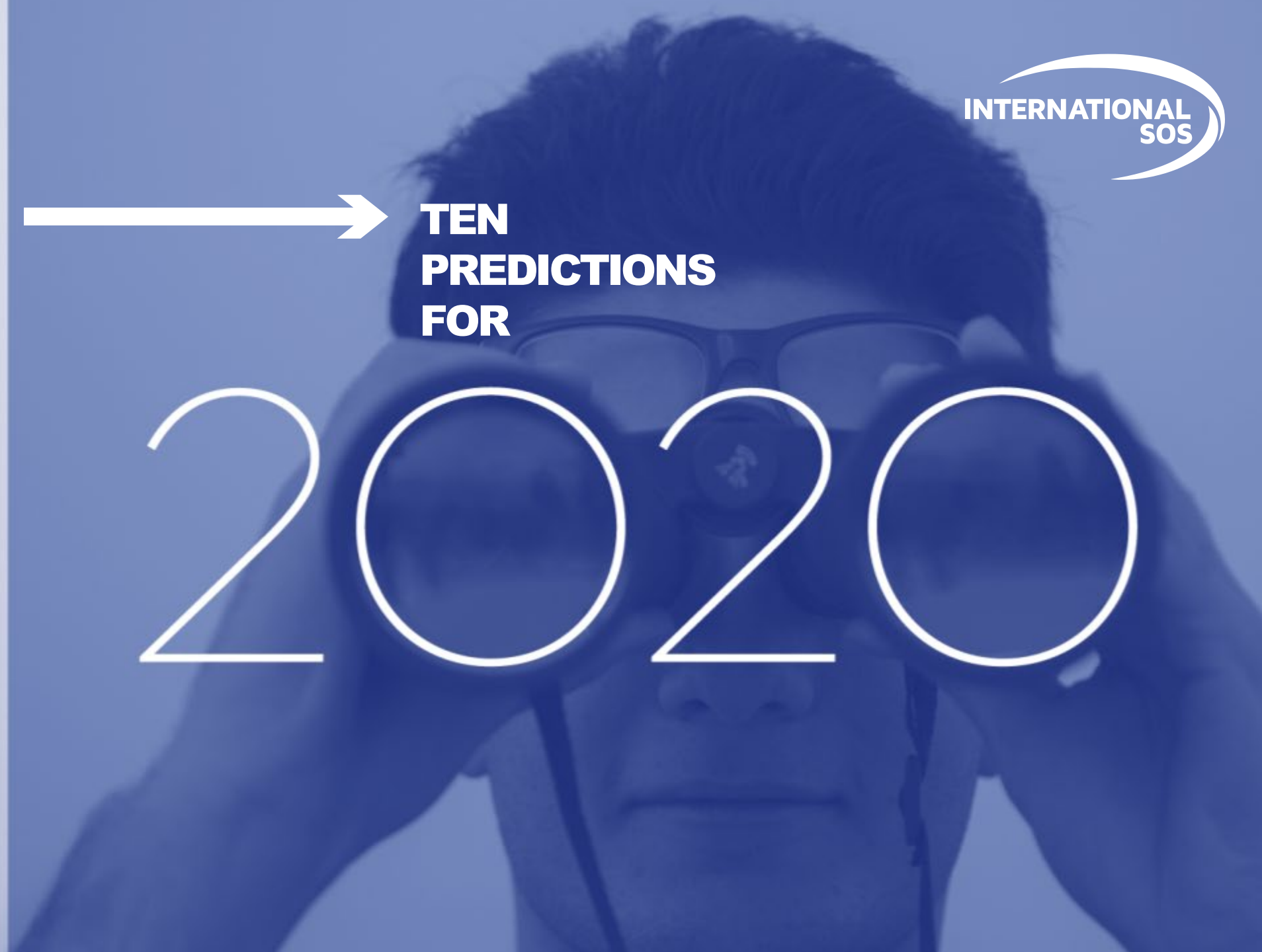

COUNTRY/REGIONAL MEDICAL & SECURITY RISK RATINGS

FIVE RESEARCH PILLARS

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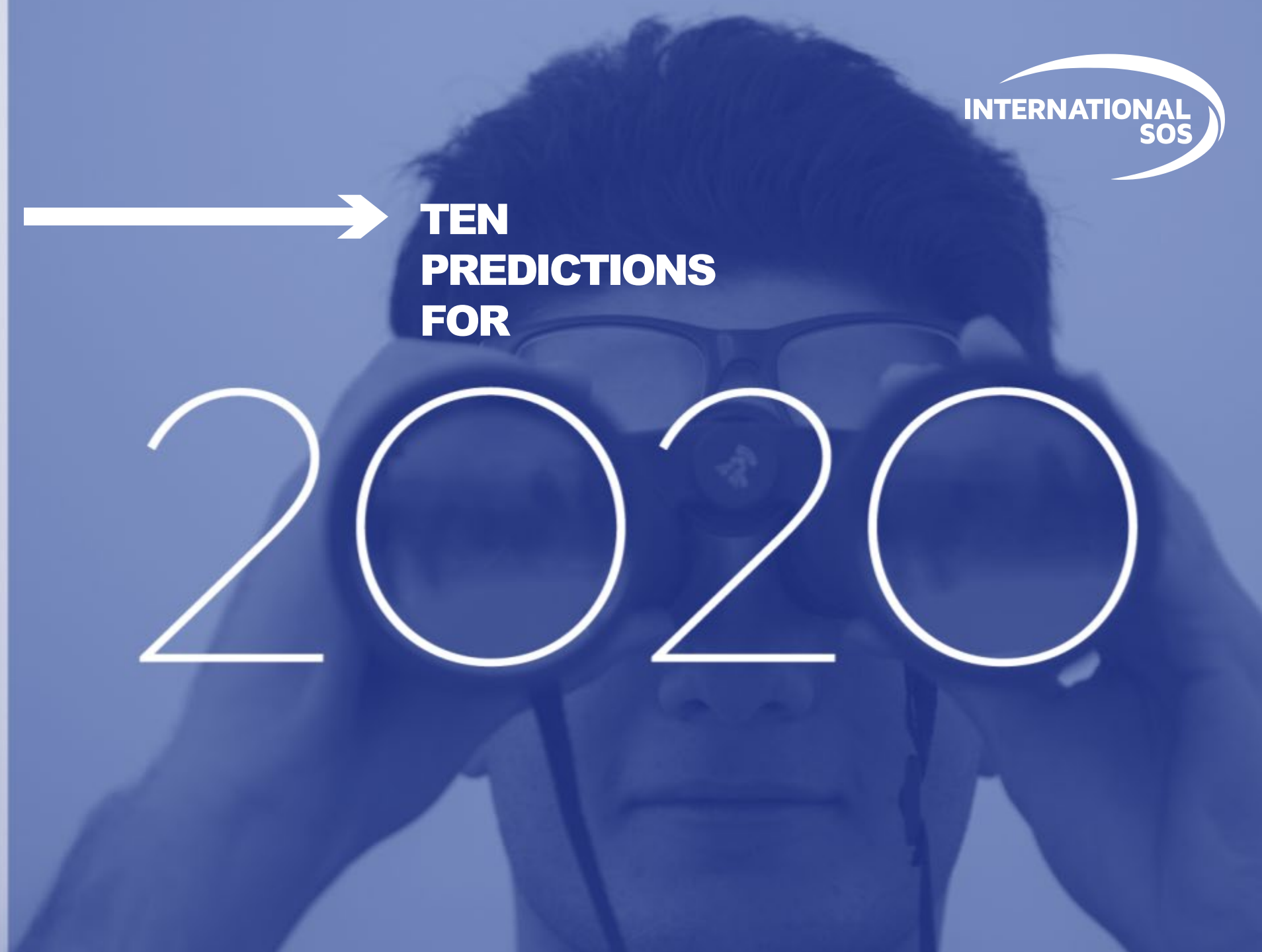


TRAVEL RISK RESILIENCE MODEL

- Employer's role in Duty of Care provision – incl. bleisure
- Confusion over how to support Millennials & Generation Z
- High profile Duty of Care legal cases
- Start-ups and SMEs under resourced / inexperienced in how to mitigate risk

- Cybercrime / attacks
- Natural disasters, extreme weather
- Infectious diseases

- Geopolitical shifts and civil unrest
- Mental health support demands
- Physical health issues

PANELLISTS

JAMES ROBERTSON
Regional Security Director

DR NATALIE YUEN
Deputy Medical Director

LOUISE VOLSEN
Client Services Director

TEN PREDICTIONS FOR 2020

Prevention

1 **Risks borne from geopolitical shifts** will be the most important mobility challenge for businesses in 2020

2 **Mental health** issues will increase in importance in 2020

3 **Physical health:** organisations will be more proactive in safeguarding physical health in 2020

Protection

4 **Cybercrime** is likely to grow and be an increasing risk to security in 2020 physical health in 2020

5 **Climate change** will exacerbate the occurrence of environmental disruptions in 2020

6 **Infectious disease outbreaks** from established and newly emerging pathogens will increase in 2020 due to multiple factors, including climate change, increasing urbanisation, diminishing vaccination coverage and security instability

Productivity

7 **`Bleisure travel':** the debate whether an employer is responsible to cover bleisure as part of employee Duty of Care will amplify in 2020

8 **Millennials and Generation Z** entering the workplace with different preferences, expectations and attitudes to risk, will continue to challenge businesses to evolve their risk strategies

9 **High profile Duty of Care legal cases** will increase in 2020

10 **Start-ups and SMEs** that are under-resourced and inexperienced will struggle to meet Duty of Care obligations in 2020

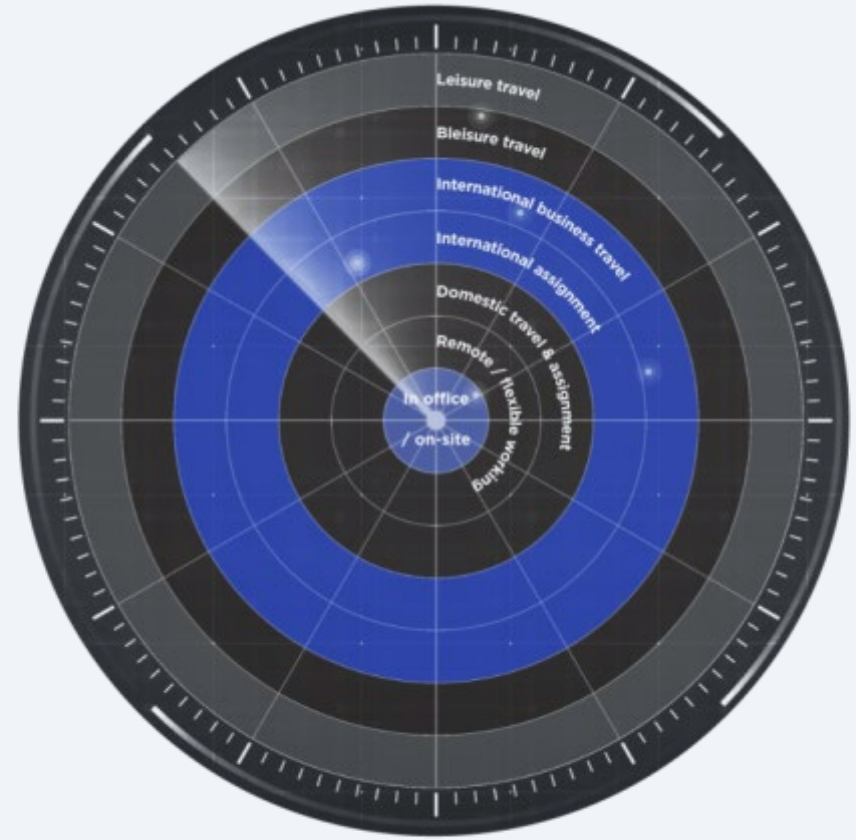
THE DEBATE WHETHER AN EMPLOYER IS RESPONSIBLE TO COVER 'BLEISURE TRAVEL' AS PART OF EMPLOYEE DUTY OF CARE WILL AMPLIFY IN 2020

Yet 22% of organisations include 'bleisure travel' in their travel policies.

Compared to other regions,
Asia is lagging behind: **only 17%** of organisations are including this.

INTERNATIONAL SOS

The Duty of Care 'Grey Zones'



Employee traditionally covered by organisation's travel risk management policy and procedures

Employee working but Employer's Duty of Care in location is in question

Employee not working - but Employer's Duty of Care is in question

MILLENIALS AND GENERATION Z ENTERING THE WORKPLACE WITH DIFFERENT PREFERENCES, EXPECTATIONS AND ATTITUDES TO RISK, WILL CONTINUE TO CHALLENGE BUSINESSES TO EVOLVE THEIR RISK STRATEGIES

INTERNATIONAL SOS

START-UPS AND SMES THAT ARE UNDER-RESOURCED AND INEXPERIENCED WILL STRUGGLE TO MEET DUTY OF CARE OBLIGATIONS IN 2020

INTERNATIONAL SOS

We care about the health, safety and security of our employees

It's the right thing to do

+

It's the law

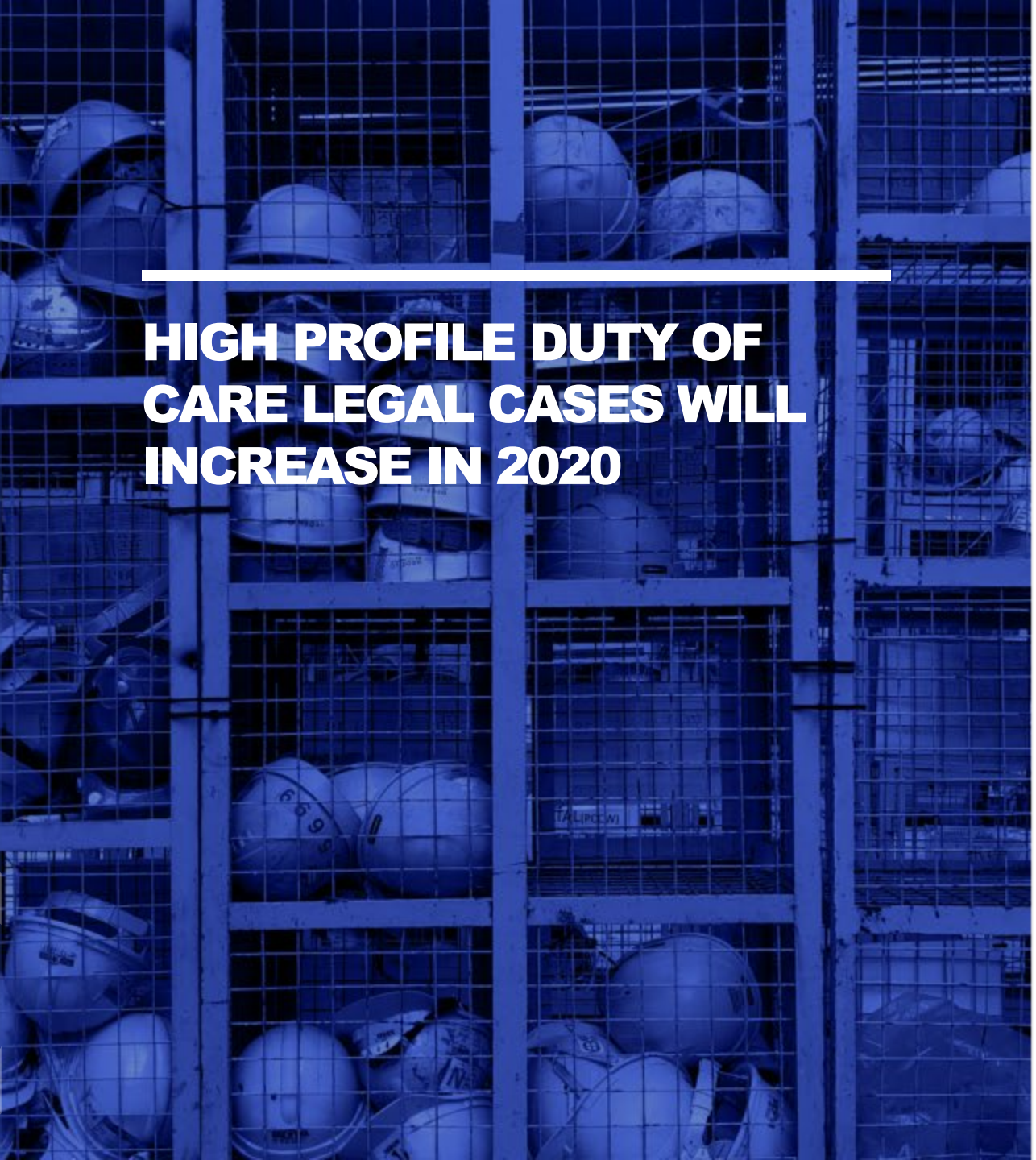
+

It's less costly than taking care of incidents

=

Smart, sustainable business operations

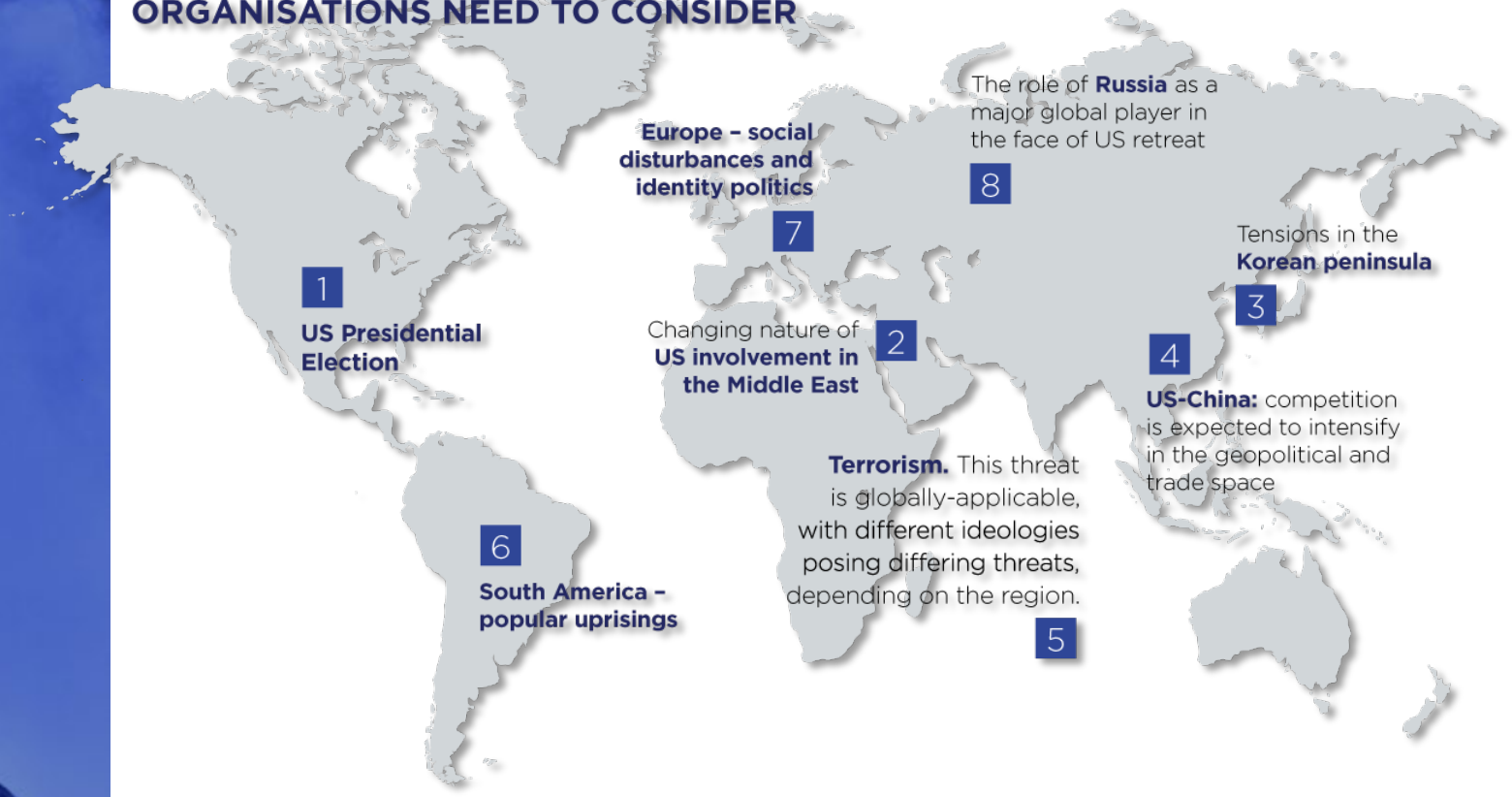
HIGH PROFILE DUTY OF CARE LEGAL CASES WILL INCREASE IN 2020



RISKS BORNE FROM GEOPOLITICAL SHIFTS WILL BE THE MOST IMPORTANT MOBILITY CHALLENGE FOR BUSINESSES IN 2020

INTERNATIONAL SOS

GEOPOLITICAL SHIFTS IN 2020 THAT ORGANISATIONS NEED TO CONSIDER



Source: Travel Risk Outlook 2020: Ten Predictions, International SOS

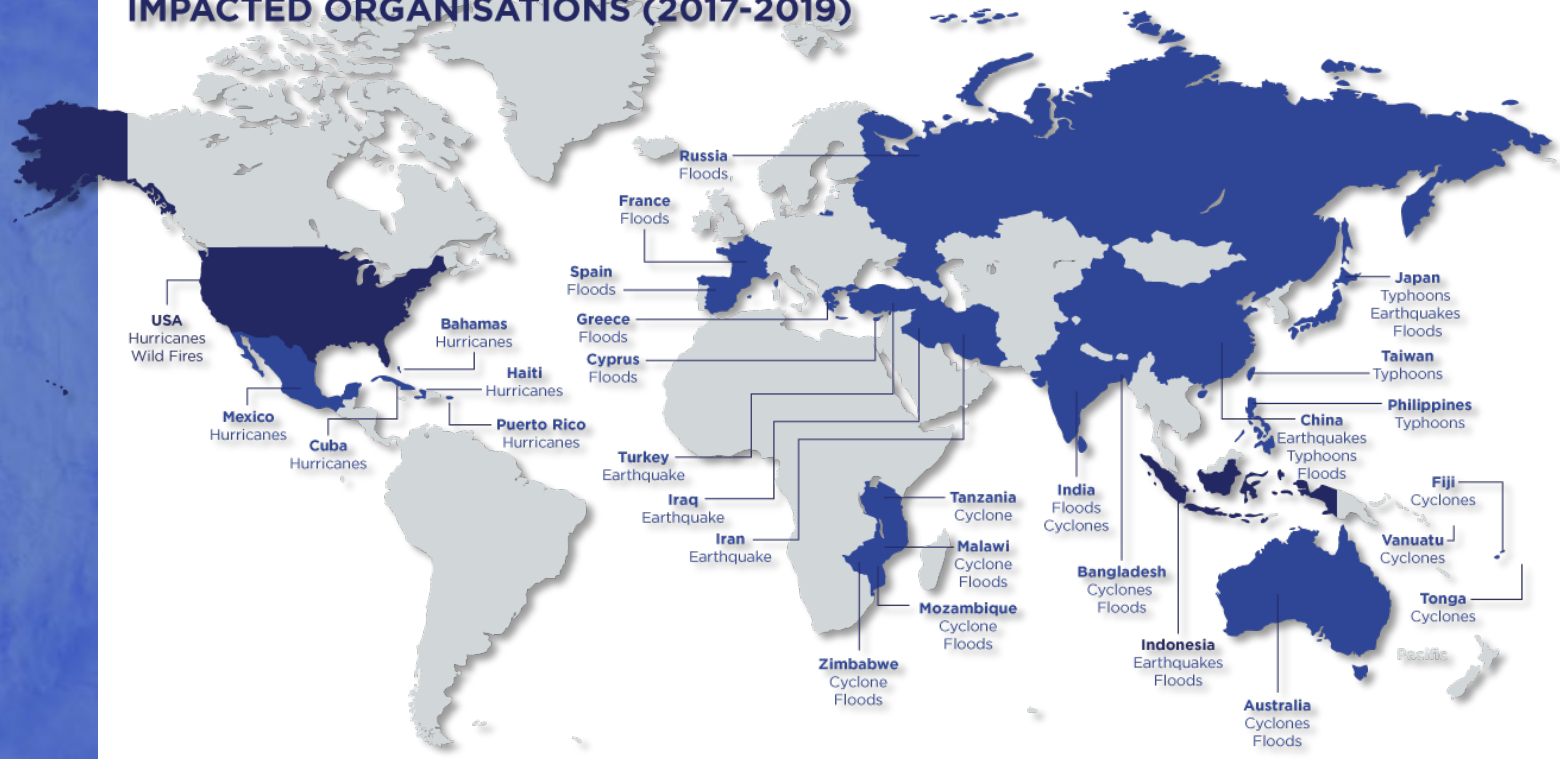
CLIMATE CHANGE WILL EXACERBATE THE OCCURRENCE OF ENVIRONMENTAL DISRUPTIONS IN 2020

51%

Half of organisations (51%) believe that natural disasters will be among the most likely causes of modified itineraries in 2020.

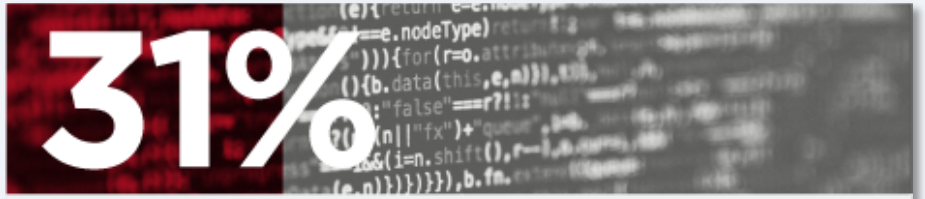
Higher in **Asia** than the rest of the world (**56%**)

NATURAL DISASTERS AND EXTREME WEATHER EVENTS WHERE INTERNATIONAL SOS SUPPORTED IMPACTED ORGANISATIONS (2017-2019)



CYBERCRIME IS LIKELY TO GROW AND BE AN INCREASING RISK TO SECURITY IN 2020

INTERNATIONAL SOS

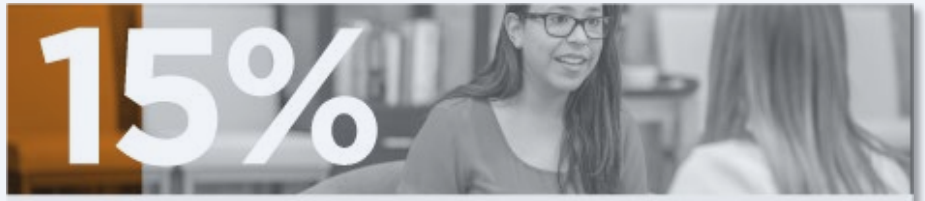


Yet less than a third (31%) of organisations include cyber security in their travel policies. Of all regions, Europe is the best performer – with 38% including this.

Asia is 10 percentage points below the global average, at just 21%.

MENTAL HEALTH ISSUES ARE FORECAST TO INCREASE IN IMPORTANCE IN 2020

INTERNATIONAL SOS



Yet only 15% of organisations include mental health issues in their travel policies. Of all regions, Americas, Africa & the Middle East are the best performers – with 19% including this.

ORGANISATIONS WILL BE MORE PROACTIVE IN SAFEGUARDING PHYSICAL HEALTH IN 2020

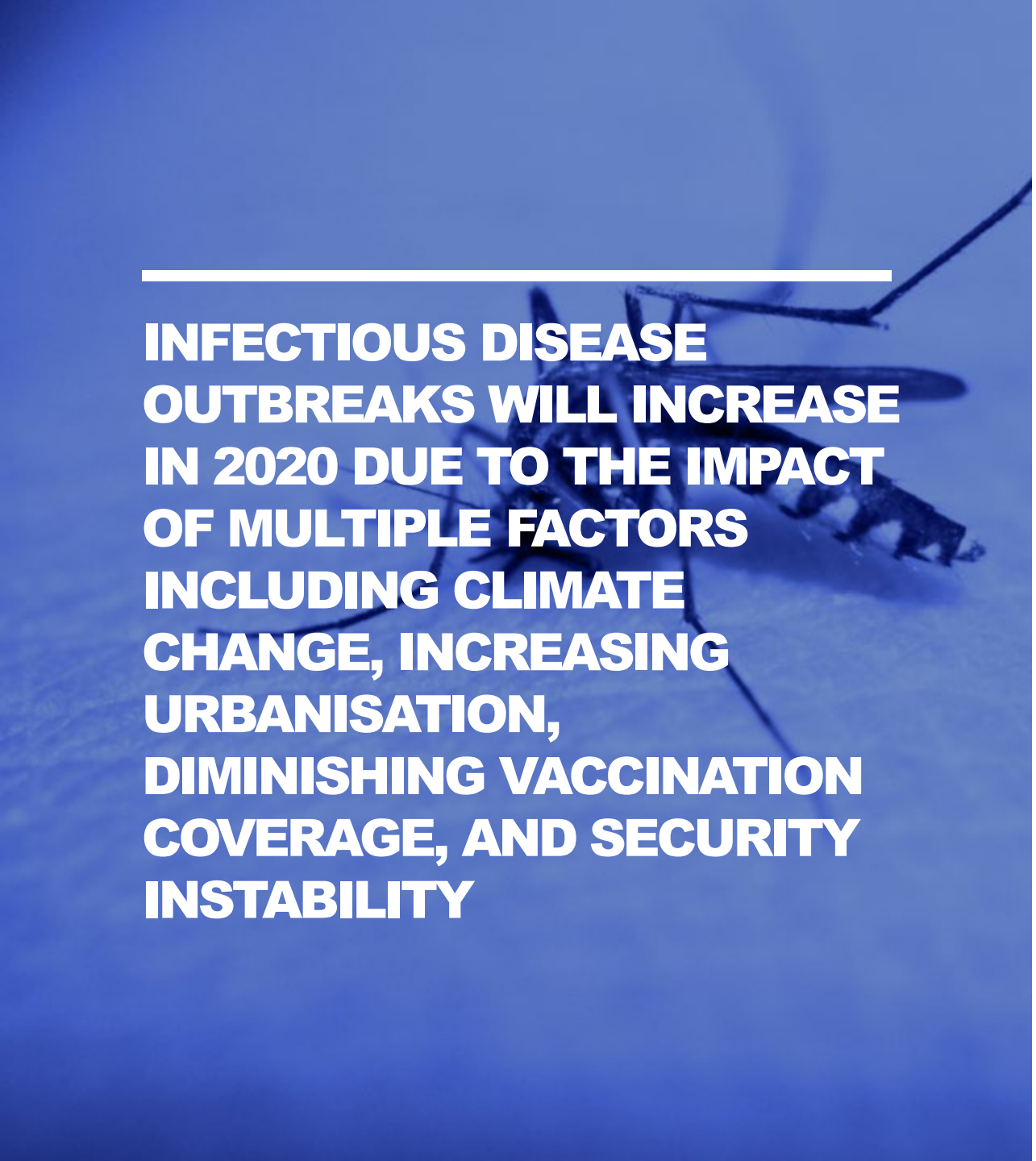
INTERNATIONAL SOS

6% **Increase in overall case activity**. While serious cases were down 8%. A positive sign.

Accidents and injuries, respiratory infections and gastrointestinal conditions were the top three issues travellers faced last year.

12% **Increase in malaria cases**. Particularly among international assignees, with more cases requiring evacuation.

80% **of strokes required evacuation**. Strokes and cardiac conditions were the most common serious cases.



INFECTIOUS DISEASE OUTBREAKS WILL INCREASE IN 2020 DUE TO THE IMPACT OF MULTIPLE FACTORS INCLUDING CLIMATE CHANGE, INCREASING URBANISATION, DIMINISHING VACCINATION COVERAGE, AND SECURITY INSTABILITY

INTERNATIONAL SOS

> You've got climate change, leading to the expansion of vector-borne diseases… malaria and dengue coming into the US now and spreading into ranges where it hasn't been for hundreds of years.

Travel Risk Management Council

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CONTACT US

internationalsos.com/trm