TRAVEL RISK
OUTLOOK 2020

INTERNATIONAL SOS

QUESTIONS & ANSWERS

INTERNATIONAL SOS

Participants will be muted throughout.

Please write any question you have in the 'Q&A' box at the top right of your screen, anytime during the presentation.

You will be sent:

- A recording of the webinar
- A copy of the map and research findings

PANELLISTS

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Head of Security
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INTERNATIONAL SOS

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

INTERNATIONAL SOS

TRAVEL RISK RESILIENCE MODEL

RESILIENCE

PRODUCTIVITY

PREVENTION

PROTECTION

- 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

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
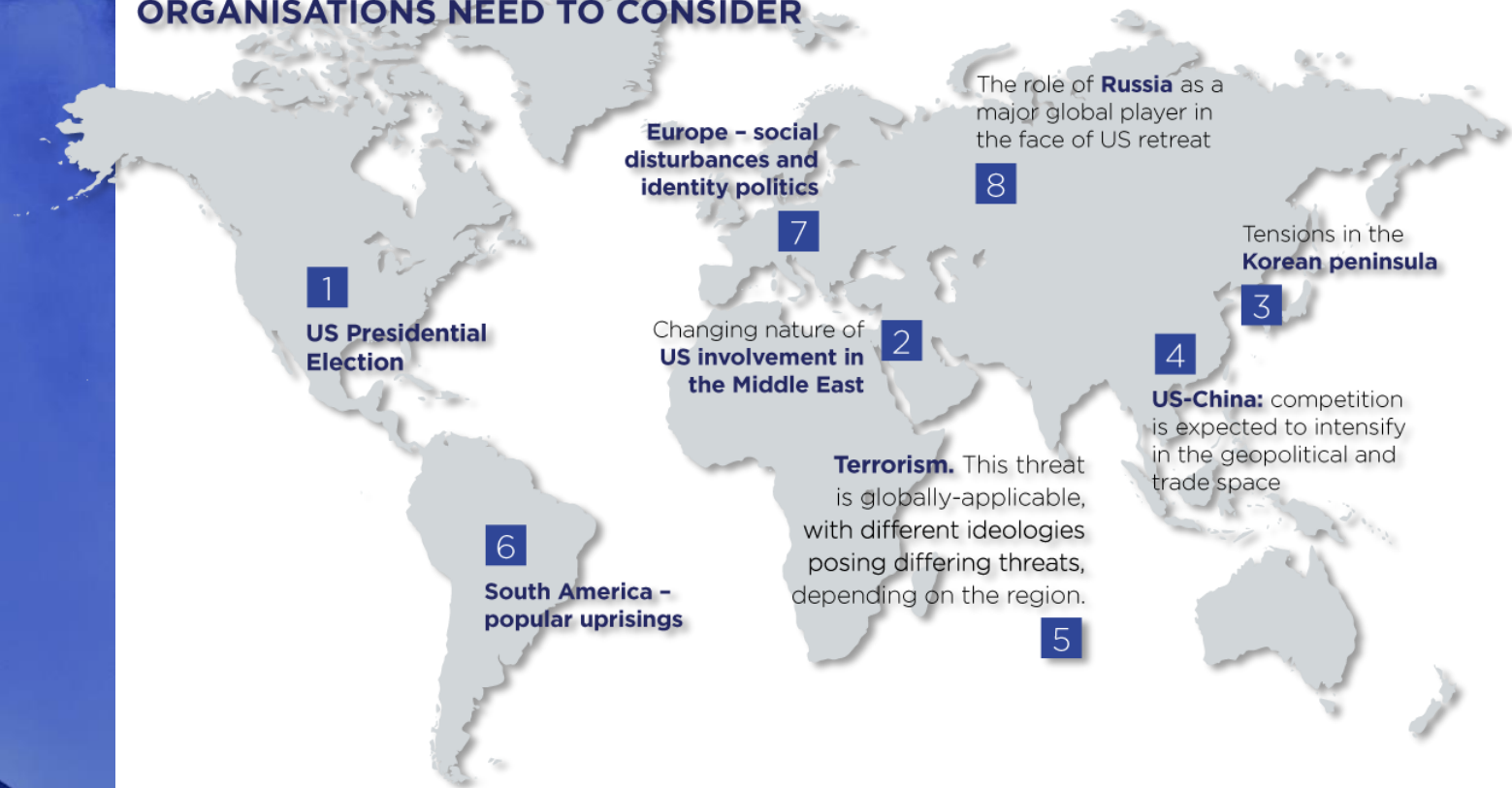
PREVENTION

- Geopolitical shifts and civil unrest
- Mental health support demands
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RESILIENCE

PRODUCTIVITY

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

GEOPOLITICAL SHIFTS IN 2020 THAT ORGANISATIONS NEED TO CONSIDER

1 US Presidential Election

6 South America – popular uprisings

7 Europe – social disturbances and identity politics

Changing nature of **US involvement in the Middle East** **2**

Terrorism. This threat is globally-applicable, with different ideologies posing differing threats, depending on the region. **5**

The role of **Russia** as a major global player in the face of US retreat **8**

Tensions in the **Korean peninsula** **3**

US-China: competition is expected to intensify in the geopolitical and trade space **4**

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MENTAL HEALTH ISSUES ARE FORECAST TO INCREASE IN IMPORTANCE IN 2020

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15%

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

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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.

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

31%

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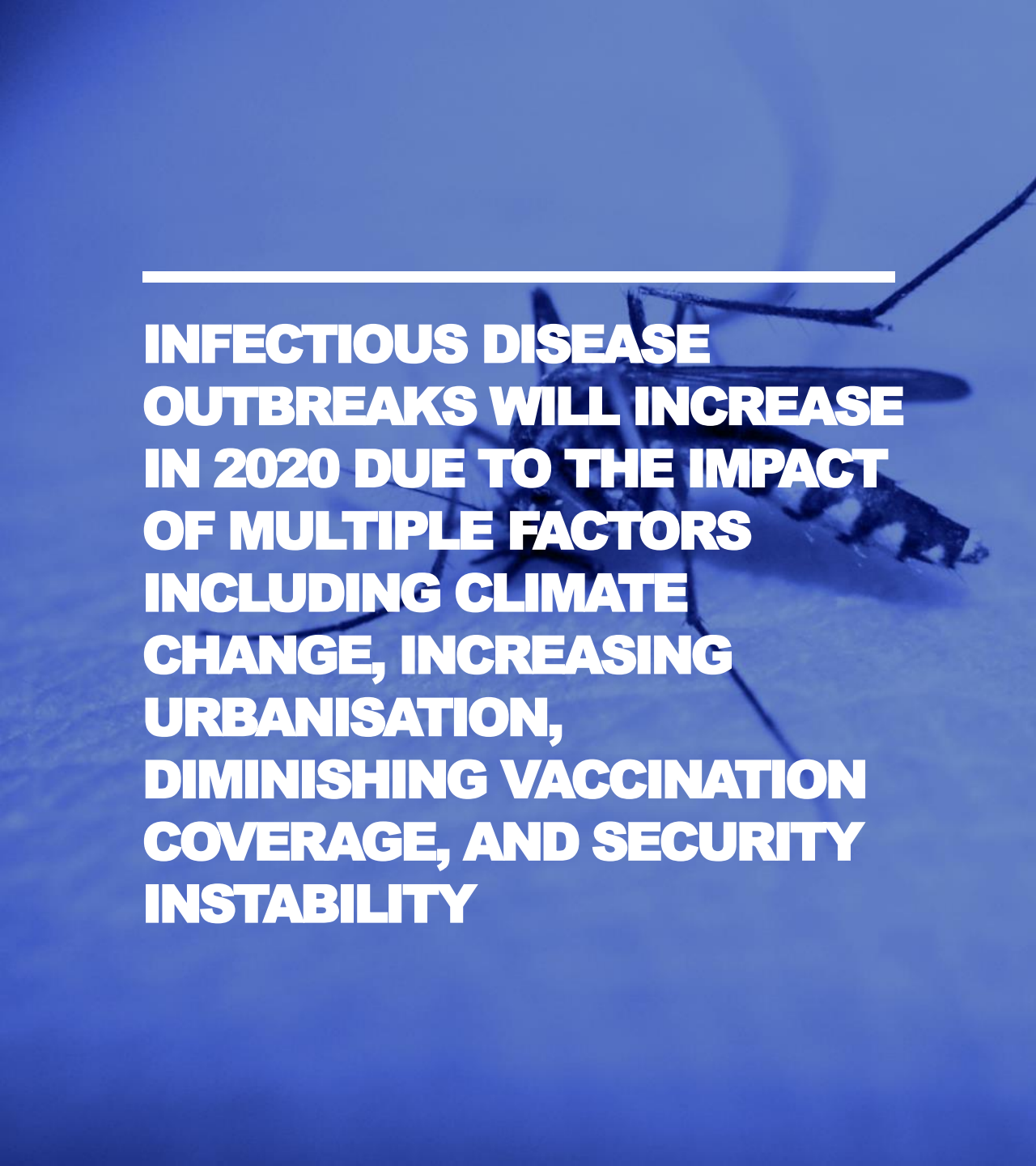
INFECTIOUS DISEASE OUTBREAKS WILL INCREASE IN 2020 DUE TO THE IMPACT OF MULTIPLE FACTORS INCLUDING CLIMATE CHANGE, INCREASING URBANISATION, DIMINISHING VACCINATION COVERAGE, AND SECURITY INSTABILITY

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" **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

PRODUCTIVITY

RESILIENCE

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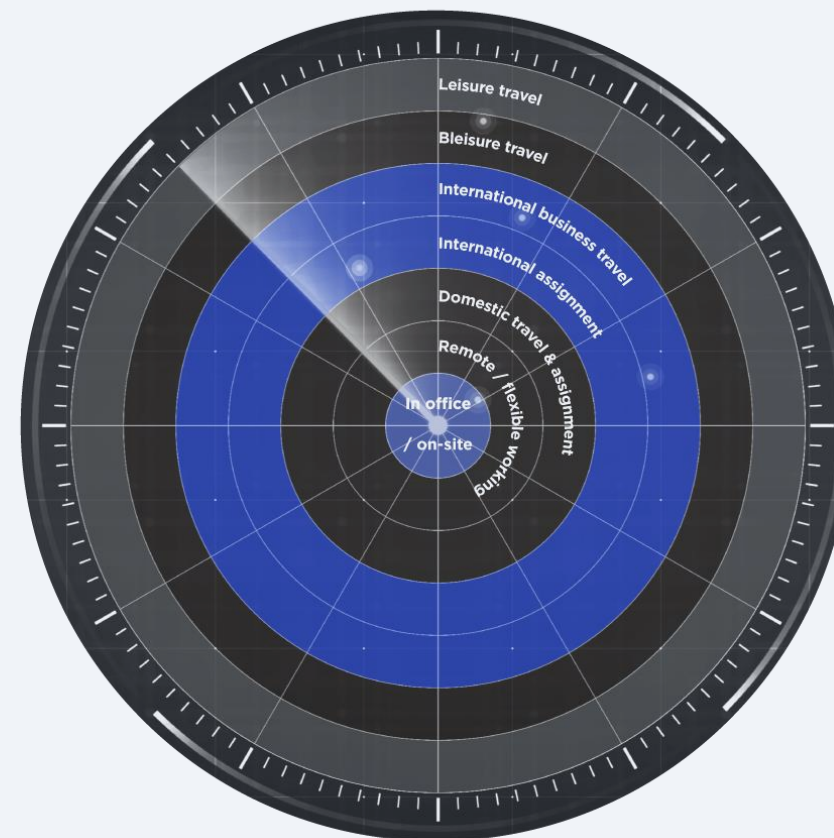- Start-ups and SMEs under resourced / inexperienced in how to mitigate risk

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

22%

Yet 22% of organisations include 'bleisure travel' in their travel policies. Compared to other regions, Europe is the best performer for including this (27%).
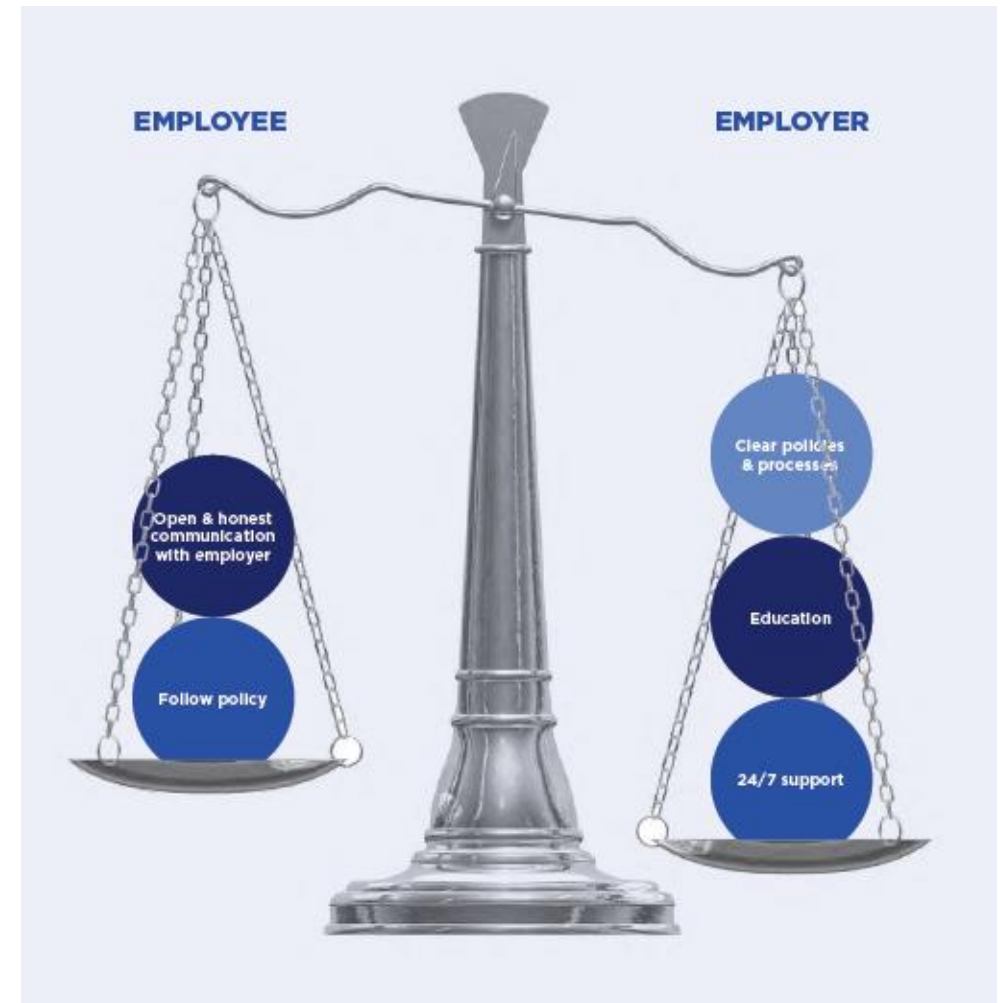

INTERNATIONAL SOS

The Duty of Care 'Grey Zones'

Leisure travel
Bleisure travel
International business travel
International assignment
Domestic travel & assignment
Remote / flexible working
In office / on-site

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

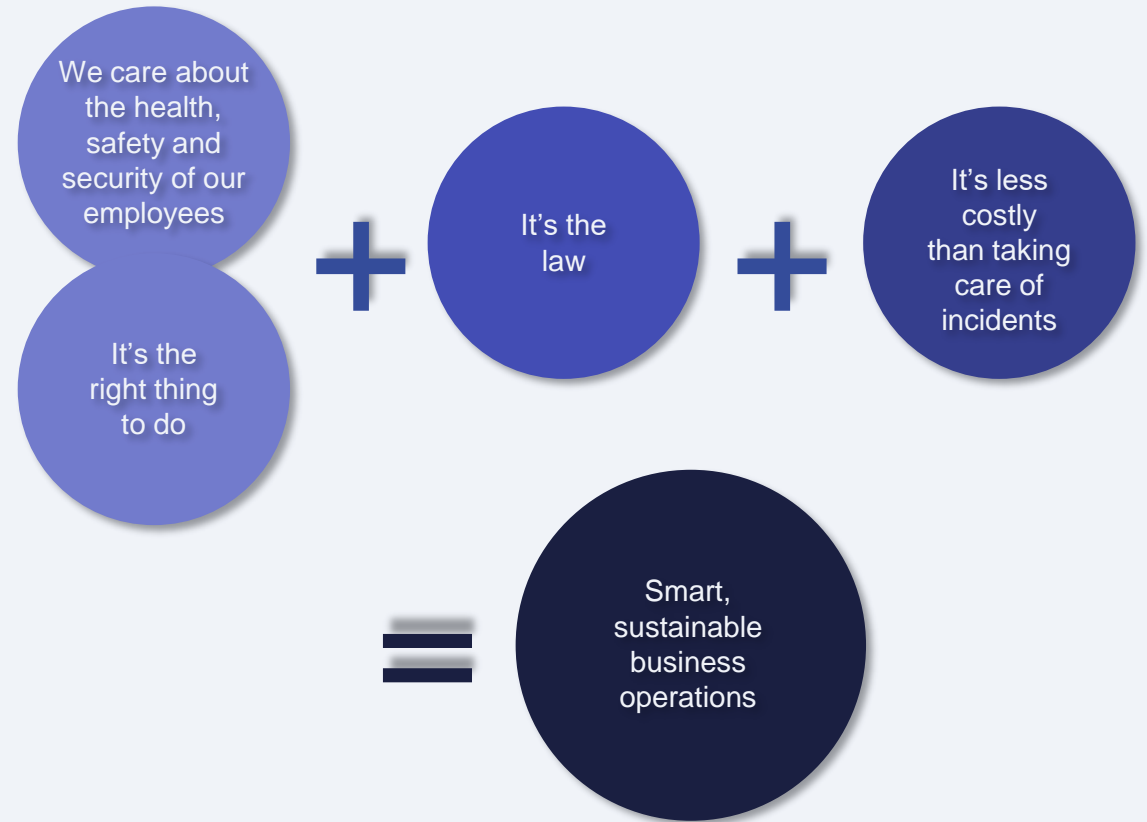Employee not working – but Employer's Duty of Care is in question

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

HIGH PROFILE DUTY OF CARE LEGAL CASES WILL INCREASE IN 2020

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

Employers   Employees

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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

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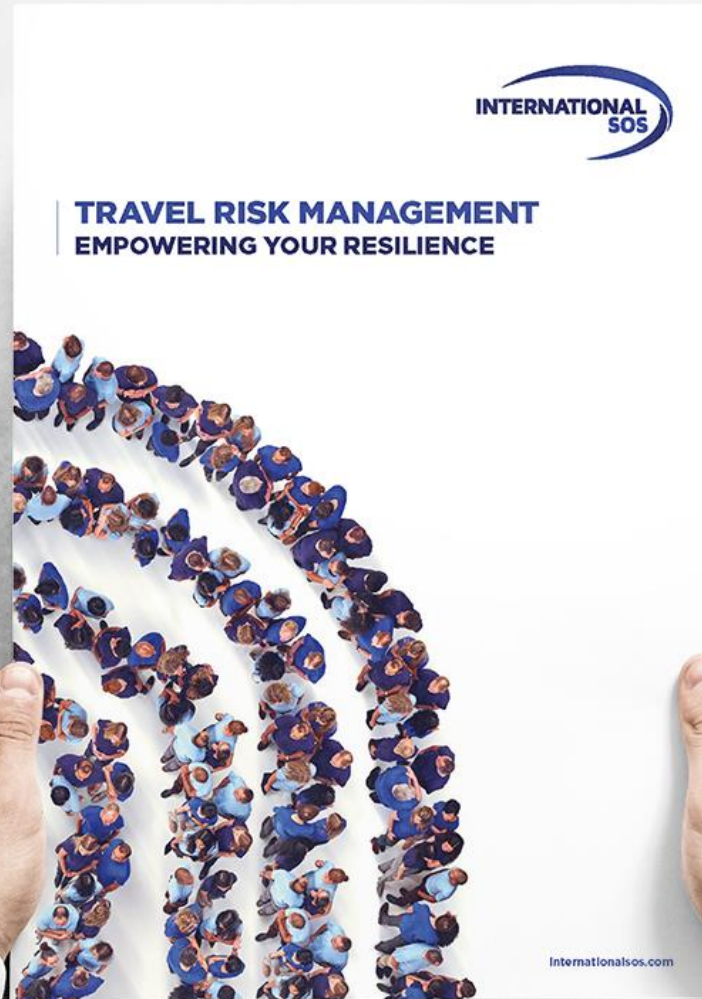|		
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PLEASE COMPLETE THE FEEDBACK QUESTIONAIRE.

YOU WILL FIND IN THE FOLLOW-UP EMAIL:
- Presentation
- Recording
- Research Report
- Travel Risk Map 2020