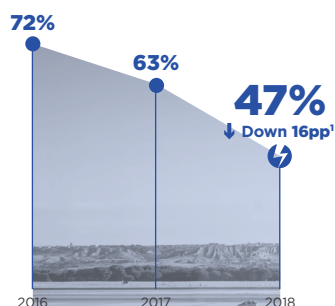
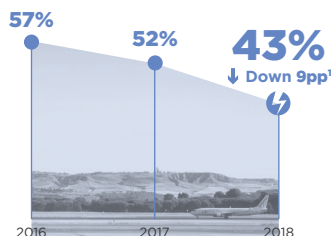


CHANGES IN RISK TO TRAVELLERS

% say travel risks have increased over the past year



% expect travel risks to increase in 2019



Top three causes of modified itineraries



48%
↓ Down 10pp¹
Security threats

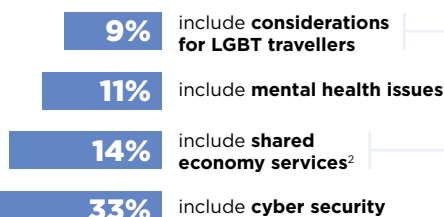


38%
↓ Down 4pp¹
Country risk ratings



36%
↓ Down 7pp¹
Natural disasters and extreme weather events

Opportunities to build future resilience: what businesses are not doing (% 'included in travel policy')



10% include **considerations for travellers with disabilities**, and **26%** include **considerations for female travellers** and **18%** include **bleisure travel**³

THE CHALLENGES OF PROTECTING PEOPLE

Seen as the biggest challenges in ensuring the health and security of a mobile workforce



63%
↑ Up 10pp¹
Educating employees about travel risks



44%
No change¹
Confirming with employees that they have read pre-travel information



42%
↑ Up 3pp¹
Tracking employee travel



42%
↓ Down 2pp¹
Communicating with employees during a crisis



40%
↑ Up 5pp¹
Having adequate resources to manage health & security efforts

Top five responses from businesses in 2018 (% 'have done this')



42%
↑ Up 5pp¹
Included travel risk assessment in travel approval process



39%
↑ Up 6pp¹
Implemented travel safety training and security training



38%
↓ Down 1pp¹
Introduced pre-trip and during trip advisory emails



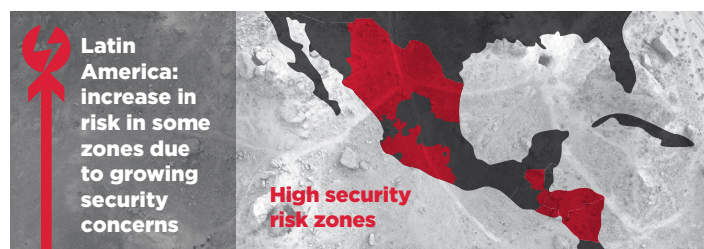
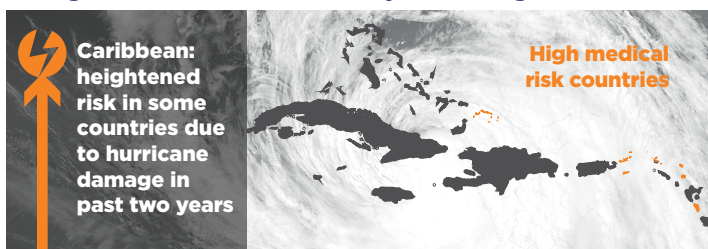
36%
↑ Up 5pp¹
Updated travel risk policy (excluding diversity-related issues)



29%
↑ Up 3pp¹
Monitor and analyse the type and quantity of health & security incidents

9% updated their company **sustainability** programme to include their travel risk activities
No change¹

Changes in medical and security risk ratings



Source: Travel Risk Map 2019, International SOS & Control Risks

In October 2018, Ipsos MORI conducted a global survey targeted to those who organise, influence, or are responsible for, their organisation's travel and risk mitigation policies. These survey findings represent responses from 640 people, across all types of organisations which have had previous contact relating to business travel health and security with International SOS, in 82 countries.

¹compared to 2017 study, measured in percentage points (PP). ²reader note: shared economy services is a peer-to-peer (P2P) based activity of acquiring, providing or sharing access to goods and services that are facilitated by a community based online platform. ³reader note: bleisure travel is the act of adding a leisure portion of travel to a business trip.