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
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
MCC Land (S) PTE Ltd

WARNER HUDSON
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H & H Health Strategies

JUDY KUSZEWSKI
Chair
Global Sustainability Standards Board (GRI)

JUKKA TAKALA
President
International Commission on Occupational Health ( ICOH)

FRANCK BARON
Chairman
PARIMA

NICK PAHL
CEO
Society of Medicine
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TEN PREDICTIONS FOR 2020
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

<table>
<thead>
<tr>
<th>Prevention</th>
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<th>Productivity</th>
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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, Asia is lagging behind: only 17% of organisations are including this.
MILLENNIALS AND
GENERATION Z ENTERING
THE WORKPLACE WITH
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THEIR RISK STRATEGIES
START-UPS AND SMES THAT ARE UNDER-RESOURCED AND INEXPERIENCED WILL STRUGGLE TO MEET DUTY OF CARE OBLIGATIONS IN 2020

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

Employers

Employees
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

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

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

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

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.

“...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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