BUSINESS RESILIENCE
TRENDS WATCH 2019

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.

1 compared to 2017 study, measured in percentage points (PP).
2 reader 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.
3 reader note: bleisure travel is the act of adding a leisure portion of travel to a business trip.

CHANGES IN RISK TO TRAVELLERS

% say travel risks have increased over the past year

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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<tbody>
<tr>
<td>%</td>
<td>63%</td>
<td>57%</td>
<td>52%</td>
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<td>%</td>
<td>47%</td>
<td>43%</td>
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% expect travel risks to increase in 2019

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<tr>
<td>%</td>
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Top three causes of modified itineraries

- 48% Security threats
- 38% Country risk ratings
- 36% Natural disasters and extreme weather events

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

- 9% include considerations for LGBT travellers
- 11% include mental health issues
- 14% include shared economy services
- 33% include cyber security

THE CHALLENGES OF PROTECTING PEOPLE

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

- 63% ↑ Up 10pp Educating employees about travel risks
- 44% ↑ Up 3pp Confirming with employees that they have read pre-travel information
- 42% ↑ Up 3pp Tracking employee travel
- 42% ↓ Down 2pp Communicating with employees during a crisis
- 40% ↑ Up 5pp Having adequate resources to manage health & security efforts

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

- 42% ↑ Up 5pp Included travel risk assessment in travel approval process
- 39% ↑ Up 6pp Implemented travel safety training and security training
- 38% ↓ Down 1pp Introduced pre-trip and during trip advisory emails
- 36% ↑ Up 5pp Updated travel risk policy (excluding diversity-related issues)
- 29% ↑ Up 3pp Monitor and analyse the type and quantity of health & security incidents

9% updated their company sustainability programme to include their travel risk activities

Changes in medical and security risk ratings

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

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