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 can also send your questions to:
communications.mea@internationalsos.com

You will be sent:
- A recording of the webinar
- A soft copy of the Predications Report and 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
CEO
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 Occupational Medicine
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 MAP

TRAVEL RISK MAP 2020
Global health and travel security risks review

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
TRAVEL RISK RESILIANCE 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
OUR EXPERTS

MAZEN JOMAA
Regional Security Manager

DR OLIVIER BARLES
Regional Medical 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
RISKS BORNE FROM GEOPOLITICAL SHIFTS WILL BE THE MOST IMPORTANT MOBILITY CHALLENGE FOR BUSINESSES IN 2020

52% VOTE

More than half of organisations (52%) surveyed believe geopolitical threats and civil unrest will be among the most likely causes of modified travel in 2020.

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

Increased concerns about the future impact of natural disasters (66%) in Russia.
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
## TEN PREDICTIONS FOR 2020

<table>
<thead>
<tr>
<th>Prevention</th>
<th>Protection</th>
<th>Productivity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Risks borne from geopolitical shifts will be the most important mobility challenge for businesses in 2020</td>
<td><strong>4</strong> Cybercrime is likely to grow and be an increasing risk to security in 2020 physical health in 2020</td>
<td><strong>7</strong> ‘Bleisure travel’: the debate whether an employer is responsible to cover bleisure as part of employee Duty of Care will amplify in 2020</td>
</tr>
<tr>
<td><strong>2</strong> Mental health issues will increase in importance in 2020</td>
<td><strong>5</strong> Climate change will exacerbate the occurrence of environmental disruptions in 2020</td>
<td><strong>8</strong> 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</td>
</tr>
<tr>
<td><strong>3</strong> Physical health: organisations will be more proactive in safeguarding physical health in 2020</td>
<td><strong>6</strong> 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</td>
<td><strong>9</strong> High profile Duty of Care legal cases will increase in 2020</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>10</strong> Start-ups and SMEs that are under-resourced and inexperienced will struggle to meet Duty of Care obligations in 2020</td>
</tr>
</tbody>
</table>
CONTACT US
internationalsos.com/trm

TRAVEL RISK MANAGEMENT
EMPOWERING YOUR RESILIENCE

communications.mea@internationalsos.com