



RISK OUTLOOK

2023

WORLDWIDE REACH. HUMAN TOUCH.

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64%

of Ipsos Reputation Council members (senior communicators from some of the world's foremost businesses) feel that fake news and disinformation now pose a material threat to their business.



Introduction

In my introduction to last year's report, I wrote that many people around the world were gripped by anxiety about the future, in the face of growing uncertainty. Sadly, this observation remains every bit as true today, even as COVID-19 recedes as a threat in most countries.

An ongoing 'polycrisis' seems certain to envelop much of the world through the 2020s. Debt, war, disease and inflation are all now a handbrake on growth. Globally, worries about inflation rose for 15 consecutive months to October 2022, obliterating concern about COVID-19 – except in China and Japan. As former US Secretary of the Treasury Lawrence Summers put it, "this is the most complex, disparate and cross-cutting set of challenges that I can remember in the 40 years that I have been paying attention to such things."

This year, 85% agree the world has become more dangerous over the past twelve months — the highest percentage since we started asking the question in 2014.

The sheer pace of change can feel disorientating. In Ipsos' 2022 Global Trends survey across 46 countries, 82% (and 88% in China) agree the world is changing too fast. In many aspects of our lives, people have a status quo bias – a predisposition to stick with what we know. Especially in turbulent times, this can

manifest itself as a resistance to change, or even a flight into nostalgia, as our much-changed world clashes with our powerful, yet slow-changing values and human needs.

This year's Risk Outlook report explores the vital role that employers can play in supporting their people through this volatility; keeping them safe, building their resilience and helping them to adapt. Leaders of these organisations rely on timely, trustworthy intelligence, to help them identify emerging risks and distinguish the signal from the noise. But this intelligence is increasingly at a premium. This year, 64% of Ipsos Reputation Council members (senior communicators from some of the world's foremost businesses) feel that fake news and disinformation now pose a material threat to their business. So this year, the Risk Outlook report also looks at the factors which impact the speed at which organisations are able to make critical decisions and plan for future risks.

For the seventh year in a row, we are proud to have developed the Risk Outlook report alongside International SOS. It remains an invaluable resource for leaders charged with navigating the uncertain times ahead.

Ben Page,
CEO, Ipsos



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agree the world has become more dangerous over the past twelve months
— the highest percentage since we started asking the question in 2014.

Executive Summary

In our last paper, I began by saying that ‘the only certainty is uncertainty’, and those words have never felt truer than they do today.

We accurately predicted the geopolitical volatility would rise above pre-pandemic levels and that mental health and long COVID would be a primary employee productivity disrupter to business in 2022. We also sent a foreigner evacuation recommendation to our clients 12 days ahead of the Ukraine conflict, ensuring they could effectively mitigate risks to their people and operations.

In this year’s report, I wanted to reflect on several important variables that have shaped my thinking as a CEO in 2022, and I feel are central to remaining resilient in 2023:

The forces shaping our post-pandemic world

The immediate crisis of the COVID-19 pandemic may have passed, but businesses and governments have yet to reach calmer waters. Labour market shifts and talent shortages added to the mix. The legacy of the early waves of the virus is still being felt in economic turbulence and supply chain disruption. This disruption has been further deepened by geopolitical uncertainty and the Russia-Ukraine conflict.

At International SOS, we continue to support our clients through uncertain times, helping them keep their global workforce safe in a world of altered risk profiles. As market leaders, we want to be exemplary in all aspects of our business, driving positive change and being a force for good.

A world in geopolitical flux

Political uncertainties abound. From increased tensions between the US and China, the Russia-Ukraine war, to a number of profound changes in

European government coalitions and instability across many developing countries.

These destabilising factors need to be considered as strands in a complex web of risk to be understood and controlled for. They must be built into our forecasting and business continuity plans, crisis management scenarios and training.

Thriving in a time of scarcity

The pandemic led many people to re-evaluate their priorities, leading to a “great resignation”, with employee turnover hitting its highest levels in decades in many countries.

Working for organisations that demonstrate purpose and a commitment to sustainability alongside pay is increasingly important. Most of all, surveys show people want an employer that prioritises their mental health and wellbeing, nurtures and develops them as a valued resource. We continue to support our clients in this human capital approach. Safeguarding and supporting staff wherever they are, is going to be key to retaining the talent businesses need to survive and thrive in uncertain times.

Climate change comes home

There is a general acceptance now that global warming is a global priority, for nations, for business and for individuals.

Businesses have to examine the implications for their workforce health of extreme temperatures. Those implications range from heat stress to changing profiles of communicable diseases. International organisations have to arm themselves with the best forecasts to predict extreme weather events. They must put in place preventive measures to protect their response plans to evacuate employees in the affected zones. With our unrivalled actionable global and local insights

and end-to-end assistance in security, logistical and medical crises, we continue to be an essential partner to business.

We continue to support our clients through uncertain times, helping them keep their global workforce safe in a world of altered risk profiles. As market leaders, we want to be exemplary in all aspects of our business, driving positive change and being a force for good.



Arnaud Vaissie

Co-founder, Chairman &
Chief Executive Officer



At International SOS, we continue to support our clients through uncertain times, helping them keep their global workforce safe in a world of altered risk profiles. As market leaders, we want to be exemplary in all aspects of our business, driving positive change and being a force for good.”



Research Process

This 2023 risk forecast is the result of the detailed analysis from several research pillars:

Research pillars:

- Workforce resilience council views
- Business resilience trends survey
- Medical & security risk ratings
- On-the-ground health & security network

Five
predictions
for
2023

Workforce Resilience council views

The Workforce Resilience Council ('Council') is made up of representative experts of all health, security, and safety fields relevant to the risks of working at home or abroad. The participants in this year's Council are from a mix of associations, advisory boards, private enterprise and IGOs. Ipsos conducted an in-depth interview with each participant, on behalf of International SOS. The opinions provided by the Council are noted as 'expert' opinions throughout this report, unless stipulated from another source. This research is designed to be illustrative, detailed and exploratory. Findings are not statistically representative of the audience interviewed. The telephone interviews were conducted in October 2022.

Business Resilience trends survey

Now in its seventh year, the survey is targeted to those who organise, influence, or are responsible for, their organisation's employee health, security and risk mitigation processes and policies. The survey seeks to understand whether perceptions of employee risk have changed: what health and security risks are of most concern to organisations and their people, including domestic employees, assignees and business travellers. Are there significant differences in risk mitigation methods and concerns across regions?

How are organisations and their people modifying their behaviour or policies to respond to these new realities?



On behalf of International SOS, Ipsos carried out an online survey among

1,218 risk professionals across 108 countries.

International SOS provided Ipsos with the sample which consisted of customers and contacts. Fieldwork took place between 2 - 28 October 2022 (see page 7 for more information).

Medical & security risk ratings

The medical risk ratings are based on a range of health risks and mitigating factors, including but not limited to: infectious disease including COVID-19 impact on accessing and provisioning healthcare, environmental factors linked to climate change, security risk rating, medical evacuation data, standard of emergency medical services, outpatient and inpatient medical care, access to quality pharmaceutical supplies, and cultural, language or administrative barriers.

An overall single rating is given for a location; however, the medical landscape can vary widely. For example, major cities may have better access to quality medical care; whereas remote or rural locations may have limited availability of health facilities and specialist care.

The security risk rating evaluates the threat posed to employees by political violence (including terrorism, insurgency, politically motivated unrest and war), social unrest (including sectarian, communal and ethnic violence) as well as violent and petty crime. Other factors, such as the robustness of the transport infrastructure, the state of industrial relations, the effectiveness of the security and emergency services and the country's susceptibility to natural disasters are also considered where they are of sufficient magnitude to impact the overall risk environment for employees. A single security risk rating is assigned per location. However, risks can vary greatly within a country's borders and more granular ratings are available.

[CLICK HERE TO FIND OUT MORE](#)

On-the-ground health & security network



International SOS has health and security experts based on-the-ground in over

1,000 locations across
90 countries.

The qualitative opinions of our senior health and security experts have been analysed in order to verify the on-the-ground reality of the research findings and to provide subsequent best practice recommendations on how to address the risks.

Business Resilience trends survey respondents:

1,218 senior risk decision makers responsible for:

- In-country employees
- Assignees
- Remote workers
- Business travellers
- Students and faculty

Across **108** countries



7%	Australia & New Zealand
29%	Asia
33%	Europe
11%	Africa
1%	Middle East
19%	Americas

Five predictions for 2023

1



Timely, accurate, trusted, actionable
– the power of **intelligence & analysis** in
decision making

2



Adjusting to perma-crisis: geopolitical
shifts, socio-economic challenges and
increasing polarisation

3



Plan for the unplannable – **travellers want
more support**

4



Climate change and other forces are
increasing **health risks** with wide ranging
impacts

5



Workforce wellbeing, the **happy at work
equation (A+B+C)-D**





35%

said their organisation's
critical decision making was
impacted by disinformation.





Timely, accurate, trusted, actionable – the power of **intelligence & analysis** in decision making

Security Commentary:

Organisations can easily collect information. There's a deluge of content on a continuous 24/7 cycle and both the pace and breadth of this content will only increase. The challenge is aggregating, analysing and using information to inform sound decisions in a timely manner, particularly for the health and security of employees and ensuring business continuity.

Compounding this challenge is the breadth of misinformation and disinformation as well as the politicisation of health or security risks. Given how visibly the use of disinformation came to the spotlight during the COVID-19 pandemic and has been a feature of the Russia/Ukraine conflict this year, surprisingly more than half of responders (jumping to 60% at C-Suite or board level) indicated disinformation had not impacted their critical decision making.

There's an expectation at senior levels that information presented has been verified and can be trusted. Pressure grows on intelligence teams to cut through the noise of increasing pace and breadth of information, determine reliable and impartial sources across geographies and platforms with divergent approaches to information regulation, predict and preempt risks and

inform decision makers in a timely and actionable way. The absence of mature intelligence capabilities in organisations risks playing catch up and having to manage at the crisis stage rather than before.



Validation and timeliness is the dual challenge of actionable intelligence, even for governments. With enough time you can usually make informed decisions based on credible information from multiple sources, and certainly not act on single, unverified sources. But when you're making decisions at speed, particularly in a crisis scenario, organisations are more challenged and the importance of an intelligence capability to organisational decision making is increased."

James Robertson,
Regional Security Director,
International SOS



Top rated factors impacting critical decision making in the next 12 months:

1. Accessing reliable information
2. Accessing up-to-date information
3. Understanding rules and regulations in the countries my organisation operates in
4. Access to external expert advisors'

Base: All respondents(1218)

ManagerView

Settings

Monitor Locations COVID-19 Alerts Reporting Hotels Resources Cases Overview

Integrated security information, analysis and assistanceActive Threat: COVID-19 Medical and security insights to prepare you for your return to operations. [Click here to view](#)

21 People at risk

9 Assets at risk

3 Open cases

57 Threats

• In depth understanding of our clients and their intelligence requirements

- Continuous assessment of risk environments inform collection and analysis needs
- Quality management system

Global network of security centres with multi-disciplinary, multilingual, multicultural Information & Analysis teams

- Continuous monitoring of Areas of Interest tools
- Engagement with source networks / boots on the ground



- Alerts with actionable advice to employees and managers delivered 24/7 via multi-channel communication
- Forecasts for managers delivered weekly and monthly alongside in depth insights on emerging issues
- Bespoke assessments and advice delivered via interaction with our Assistance Centres
- Early warning for our operational planning in our Assistance Centres and our Crisis Management Team



- Interpretation of information & sources
- Selection of deliverable(s)



- Carried out by our Information & Analysis teams for a timely, accurate, apolitical assessment
- Informs operational planning; provides early warning for crisis response; informs advice to clients

Technology-based solutions to meet this complex need continue to grow and develop ever more powerful ways to surface and rapidly aggregate information. Still, there is a requirement for human intervention. In both high and low-networked settings, sources require verification. Harnessing the power of technology to influence critical decisions remains the purview of intelligence teams and requires a human-in-the-loop to critically analyse sources, ensure reliability of information and provide forward-leaning advice on how situations can evolve and what actions to take. Linking reliable and trusted information to critical business and life safety decisions remains the central role of intelligence.

Organisations also battle information complexity in their communication with employees. Responders listed educating employees about risks among their top challenges. In an era of increasing information access and reliability concerns, organisations want to cut through and ensure their employees have access to trusted information about risk and advice on mitigations. Despite this desire, only 10% of responders felt employers had a role to play in countering disinformation pointing instead to governments, social media organisations and regulators.

Information – and control over access – will continue to be a powerful political tool. During social unrest and in conflict zones the ability to toggle up and down access to communications and social media platforms has become ubiquitous with government or security force response. This not only further complicates access to reliable information about risks or ongoing incidents but also adds layers to contingency planning needs. At times cut off from centralised crisis support, regional or local managers or crisis teams need to be empowered to make effective decisions.



Only 10%

said employers had a role to play in combatting disinformation.

This undermines efforts to address challenge responders identified in educating employees about risks.

Which, if any, of the following are current for your organisation in ensuring the health and security of all your employees?

Top challenges



Base: All respondents(1218)



Effective risk mitigation so often comes back to having really good access to information. Access to trusted apolitical information helps organisations understand what's evolving, how it might change over time, knowing when it has changed and knowing what to do about it. That sets organisations up for success but it's a not easy to do."

Sally Llewellyn,

Global Security Director, Information & Analysis, International SOS



Medical Commentary:

The COVID-19 pandemic has brought to light the importance of “public health intelligence (PHI)”. Public health intelligence, as defined by the World Health Organisation describes “the process of moving from data through knowledge synthesis to action with the specific aim of early detection for effective response”. Basically, knowing the on the ground health situation is critical to being able to make informed decisions.



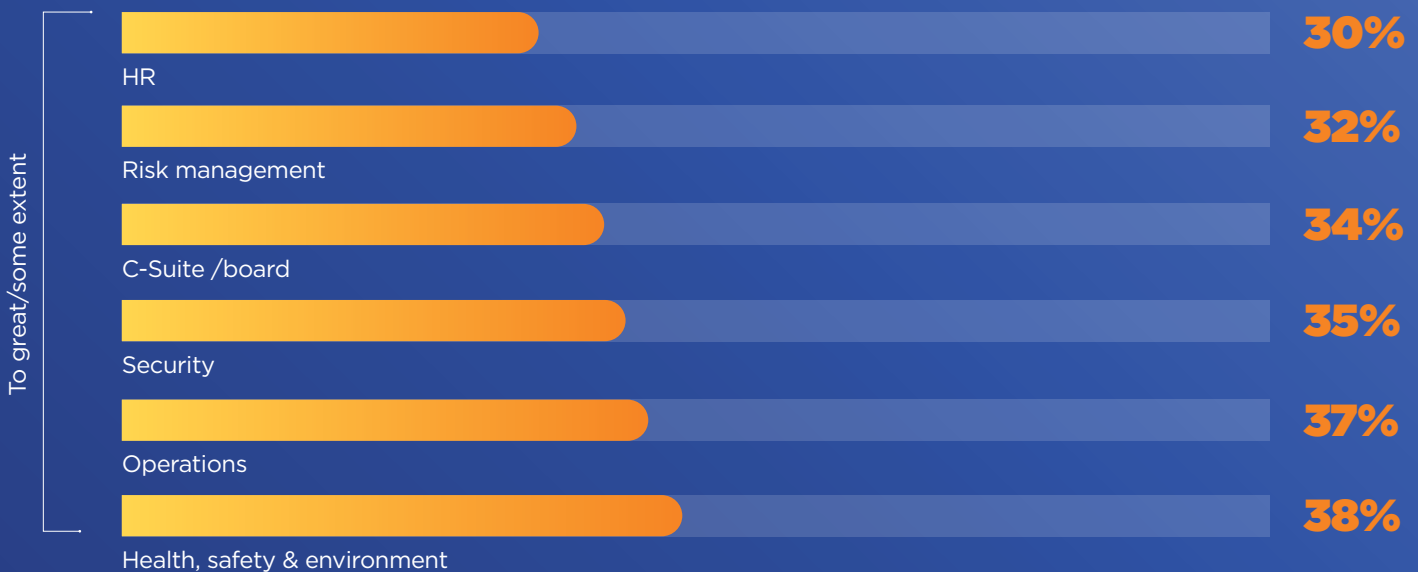
The pandemic has placed health threats on their business continuity and crisis management radar forever.”

Dr Myles Druckman,

Senior Vice President & Global Medical Director, International SOS



HSE Managers reported their organisations decision making most affected by disinformation in the last 12 months



Base: C-Suite/ board (208), Operations (134), Health, safety & environment (200), Risk Management (125), Security (173), HR (175)

During the pandemic, the private sector became major participants in Public Health Intelligence. They developed dashboards and teams to monitor and analyse health data collected locally around the world, and used this dynamic information to best plan and time their actions to protect their people and operations. One lesson learned was that accurate local health information was not only difficult to access, but could be unreliable. Risk Outlook survey data revealed that communications and accurate, timely information remain a high priority and accessing reliable and up-to-date information were the top two factors affecting future business decision making.

Public Health Intelligence remains a global challenge, and the private sector has an important stake now in ensuring there is significant improvement so we can

better respond when the next public health emergency will inevitably hit.

Risk Management:

- Reliable trusted information for employees and managers proactively pushed in ways employees will engage.
- Investment in resources to analyse sources and protect decision makers from mis or disinformation.
- Understand risk exposure based on profile and locations of operation; focus decision making on likely escalations based on realistic scenarios.
- Clarity of decisions and triggers for these decisions in case of communications outages.



Quality intelligence ensures that most risks are foreseeable, at least in broad terms. You can anticipate threats and their likelihood and impact to feed into genuine forward leaning risk management, although you can rarely be precise on location and timing. Very few events come from nowhere or without precedent, whether natural disasters, conflict or even pandemics. Such events usually have an escalation phase or at least trends, indicators or warnings which good intelligence can foresee.”

Sally Llewellyn,

Global Security Director, Information & Analysis, International SOS





Adjusting to perma-crisis: geopolitical shifts, socio-economic challenges and increasing polarisation

Security Commentary:

The Russia/Ukraine conflict has been the defining security issue of 2022. Geopolitics and the threat of State vs State conflict is firmly back on the corporate risk agenda. The far-reaching impacts of the conflict will remain key features of the global risk environment into 2023.

C-Suite and board responders are attuned to risks associated with geopolitical shifts, which, as we've seen play out, can affect organisations in a range of ways. Survey responders raised concerns about the impacts of geopolitics on everything from

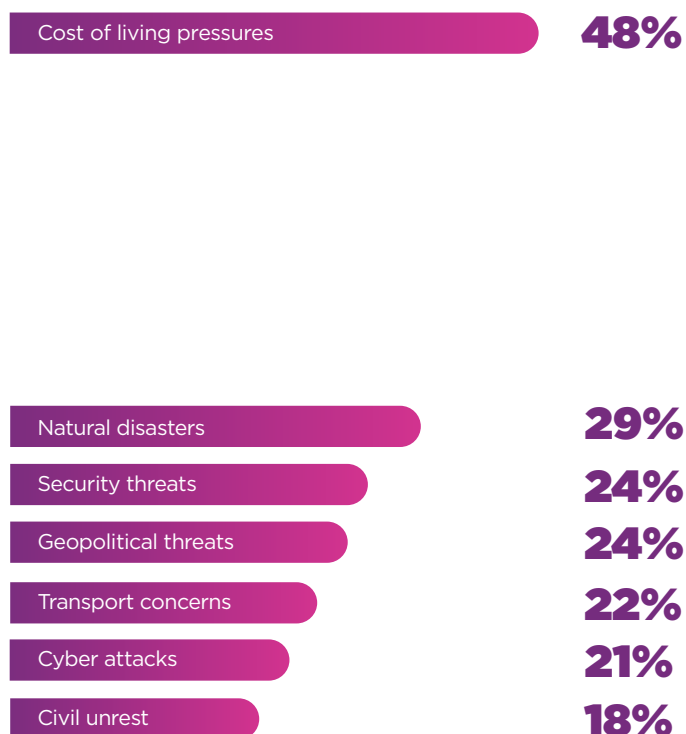
workforce risk management to business traveller productivity in the next 12 months. Responders also highlighted 'understanding rules and regulations in the countries my organisation operates in' as a factor that will impact critical decision in the coming 12 months'. Geopolitical shifts will play into this challenge as sanctions or other regulatory requirements complicate global business operations. In extremis and across a variety of industries these regulatory changes can impact employee life safety decisions and understanding where or how they might evolve is key to market entry or ongoing engagement in a polarised and State-controlled world.

Top drivers of productivity loss in the next 12 months:

Travellers



Domestic employees



Within crisis management structures there's a mood of 'perma-crisis' as organisations flowed from managing the impacts of the COVID-19 pandemic to mounting responses to the Russia/Ukraine conflict and its broader impacts. This added to the weight of more localised or organisation-specific issues impacting employee health and security or business continuity and demanding rapid crisis-related decisions. C-Suite and board level responders listed maintaining crisis management structures amid their top challenges. Managing crisis management fatigue is key in moving from perma-crisis to crisis resilience and organisations who effectively embedded learnings from the last two years will emerge with more robust capabilities to manage challenges. Crisis blisters become crisis calluses: teams become more resilient to managing crises as day to day functions.

Geopolitical volatility will spread beyond Russia/Ukraine in the next 12 months. Increasing fissures between Russia and the west will impact other conflicts and exacerbate longstanding geopolitical tensions.

- Iran's engagement with Russia, as well as recent responses to protest activity in Iran, have antogised the west risking further delays in the already protracted nuclear negotiations (JCPOA) aimed at nullifying broader regional tensions.
- Pro Russia themes have emerged in recent political unrest in west and central Africa as influence shifts. Questions over Russia's influence in the Balkans and Caucus regions will risk further volatility in these longstanding security issues.

Beyond the highly visible Russia/West divide, US-China competition remains a key feature on the risk landscape and will increasingly dominate the geopolitical and economic landscape. Organisations will need to consistently revisit likelihood and impact calculus to understand potential implications for their business and people. Peaks and troughs in cyclical escalation on the Korean peninsula will continue to be influenced by broader US-China dynamics as will numerous regional tensions, impacting business operations and employees.

C-Suite: Top challenges to ensuring health and security of all employees

- 1 Educating employees about risk
- 2 Motivating employees to prevent risks
- 3 Cyber
- 4 Maintaining crisis management structures
- 5 Communicating in a crisis
- 6 Dealing with financial wellbeing issues

Base: C-Suite/ board (208), Operations (134), Health, safety & environment (200), Risk Management (125), Security (173), HR (175)



It can feel like you're constantly responding to crises, which is not a robust way to run a business. So being able to be resilient to crises and make decisions about what is genuinely a crisis issue comes back to good planning; clarity on risk tolerance and exposure; and, empowering and supporting decision makers in a crisis process."

Sally Llewellyn,

Global Security Director, Information & Analysis, International SOS





International volatility has already spread to domestic risk environments. Social unrest is on the rise and, although the scale and impact of unrest will be driven by inherently local factors, some themes compounding the risk of social unrest are universal. Most notable and universal is COVID-19's economic impacts, compounded by the global ripple effects of the Russia/Ukraine conflict. Unsurprisingly, concerns about cost of living rated highly among responders as an expected driver of productivity loss in the next 12 months.

Example drivers of social unrest:

- Volatility in energy and agricultural markets will fuel unrest, particularly in unstable, fragile economies. Most likely locations: Sub-Saharan Africa, Egypt, Lebanon.
- Lack of progress on resolving underlying economic or political issues will provoke growing public dissatisfaction and cycles of unrest where the risk of violence grows over time. Most likely locations: Pakistan, Sri Lanka, Ecuador, Peru, Iraq.
- Dissatisfaction with progress on social issues, including women's rights, racial inequality and climate change will prompt ongoing disruptive and sometimes violent protests. High risk locations: US, Western Europe, Iran.
- Polarisation at global level will be reflected in further domestic polarisation inflaming pre-existing triggers for social unrest and, in extremis, influencing more localised violence and criminal activity. High risk locations: US, Western Europe.

Return of inter-State conflict also risks emboldening non-state terrorist or militant threats as peace-keeping cooperation reduces or is polarised and governments divert security force activities. There is likely to be a resurgence in Salafi-jihadi terrorism linked to existing militancy groups. This will be borne out particularly in Africa. Islamic State seeks to entrench its presence in un/under-governed spaces on the continent, including through ties to other potent groups like al-Shabab. We haven't yet seen the impact of Taliban rule in

Afghanistan on the potential for greater militant threat abroad, but it will likely come. The risk of further, and potentially complex, terrorist attacks in low-risk environments, particularly in western Europe, is on the rise. More localised insurgencies, including in the Philippines, Thailand and India retain their perennial influence on the risk environment.

Risk Management:

- Understand organisational risk profile and vulnerabilities in geopolitical shifts.
- Monitor trends in social unrest; work to anticipate likely locations and potential impacts mapped to your organization and people.
- Ensure early warning systems are in place to foresee emergent risks from global to local, informed by trusted analysis; invest in support structures to identify and proactively manage complex risks.
- Pre-empt likely crisis decisions as part of sound crisis management planning; identify crisis triggers and decision makers.
- Routinely educate employees on risks and steps your organisation is taking to mitigate them and keep the workforce safe; build a culture of care.



Employees expect their employers to have a moral compass on geopolitical issues, which I don't feel has been a real theme previously across all organisations. Employees now expect to be able to stand behind a mission and a vision and for employers to have a view on geopolitical issues and social issues. That is impacting on employers' ability to attract and retain talent."

Sally Llewellyn,

Global Security Director, Information & Analysis, International SOS



While we think of geopolitics as a security concern, health issues can play a major role – as the COVID-19 pandemic demonstrated. Faced with the same COVID-19 threat, governments responded at different speeds and in different ways.

Some activated stringent “zero-COVID” policies – with mass testing, quarantine and lockdowns. Others were lenient with minimal interventions or restrictions. How a government and community respond to a health threat can have major implications to civic stability, community services and business operations and the global supply chain.



Plan for the unplannable – **travellers want more support**

Security Commentary:

Responders noted that concerns about security risks – including geopolitical threats – and concerns about travel disruption would decrease employee appetite to travel in the next 12 months. However, the percentage of responders who perceived that travel risks have increased slid back to just above pre-COVID norms.

Focus will become on how best to support apprehensive travellers. Responders highlighted that having support provided by organisations would have the biggest impact on employee willingness to travel and on organisational likelihood to approve travel in the next 12 months.

Risk Outlook survey shows that most organisations are keeping travel risk management budgets the same or increasing, so travel will continue to grow and will likely return to pre-pandemic levels. But as we get there organisations will be pushed to manage more real-time information, more granular risk assessment and enhanced travel risk scrutiny, to ensure their travelers are safe, secure and productive.

This is a trend well supported by the International SOS case data, our traveller tracking data shows international travel now at 83% of pre-COVID volumes, but travellers are twice as likely to call for advice or assistance.



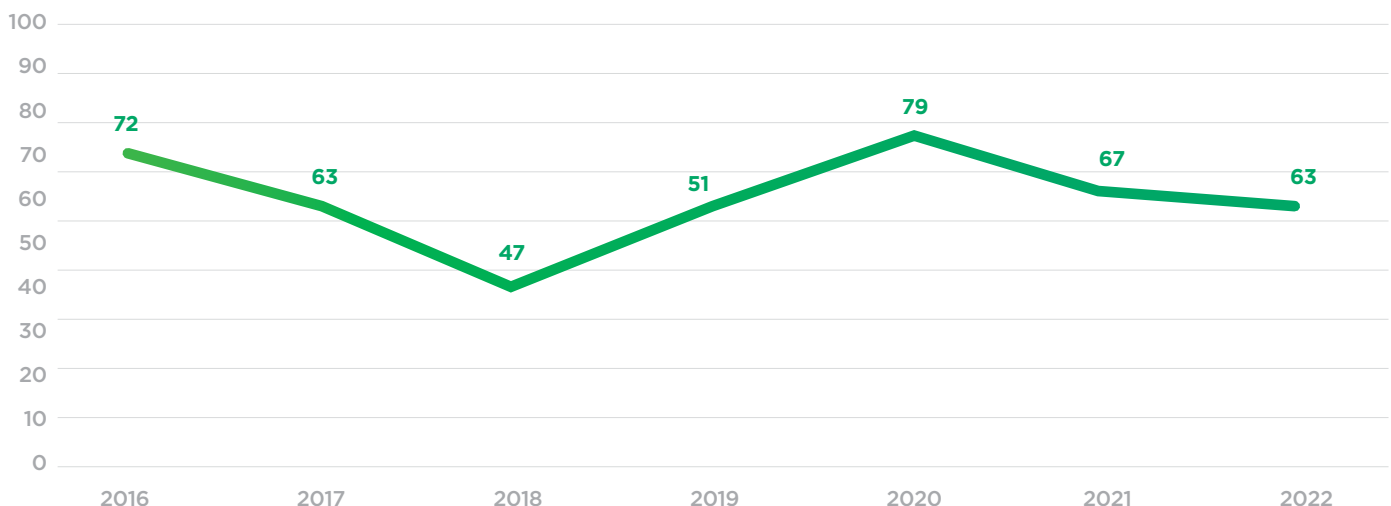
I think the last two years have really changed people's views on travel. You've got some that are just championing to get back on the road and get back to it and then you get others who are really hanging on to that reluctance."

Valerie Ferraro,

Global Chair, Global Business Travel Association



Business travel risks - % saying travel risks have increased in the last 12 months



Base: All respondents responsible for supporting Business travellers (768 in 2022)



Top rated factors expected to decrease employee appetite to travel in the next 12 months:

1. Travel disruptions
2. Concern around geopolitical threats
3. Travel bans to specific countries
4. Concerns around COVID-19
5. Concern around security threats

Base: All respondents responsible for supporting: Business travellers (768)

Organisations are historically well-versed in the concept of location-specific risks. Now the two other pillars of traveller risk management – controlling profile and itinerary risks – are more germane. Demographic and personal traveller characteristics can elevate (or reduce) their level of vulnerability. LGBTQ+ staff confront hostile (but sometimes improving) legal settings and pervasive social taboos. Activists, carriers of valuable intellectual property and those with diminished resilience can have a higher risk profile.

Unusual routes or mode selections, due to lower pandemic-era carrier capacity and connections, or from environmental and sustainability choices also modifies travel risks. Pressure to opt for high speed rail in Western Europe, or to use local shared micro-mobility services in SE Asia, for example, are new issues (and opportunities) for travel risk managers to consider developing policies and journey management plans.



86%

reported they expect their budget to support the health and safety of their travellers to increase or stay the same.

Preparation: It's not just about the destination risk



- Closed borders
- Outbreak burden on health & country infrastructure



- Poor medical care
- Infectious diseases
- Air quality
- Hotel



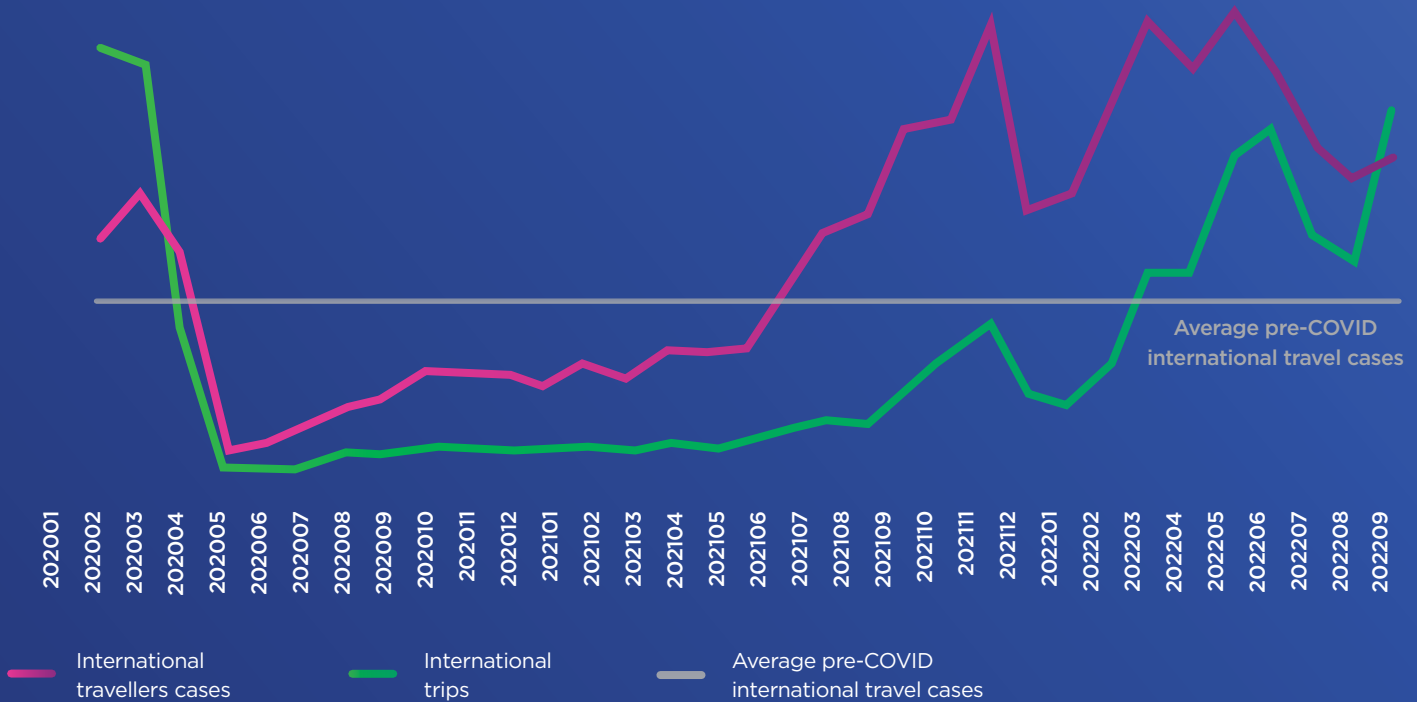
- Cyber
- Petty crime
- Road safety issues
- Terrorism & civil unrest
- Natural disaster



- LGBTQ+
- Pre-existing medical concerns
- Mental wellbeing
- Female traveller

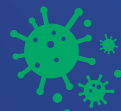
International travellers need more support:

Assistance to international travellers, international travelling trend



2.1x

Total international travellers request for assistance monthly average 2022 vs 2019



83%

Volume of international trips vs. pre-COVID



Helpfully, three years of tracking and contact tracing for public health has normalised such digital controls for many travellers. Controls such as itinerary and dynamic tracking, checking in, and the importance of identifying ‘exposure’ to a threat have clarified support available and how to access it – both for travellers and their managers – is vital to overcoming apprehension in returning to travel and to support those who are already comfortable. Organisations can leverage travel risk mitigation tools as employee benefits and to promote a culture of care while also balancing compliance-related requirements.”

James Robertson,

Regional Security Director, International SOS



Medical Commentary:

As international travel restrictions loosened and vaccination rates increased, flights to domestic and international destinations began to rise. International sporting events, mass gatherings, conferences and in-person company meetings are back. While the pandemic is waning in many people's eyes, Risk Outlook survey shows that business travellers see risks increasing in the next year.

Developing a structured approach to the development, implementation, evaluation and review of an organisation's travel risk management programme is important not only to the assessment and treatment of travel risks, but promoting a culture where travel-related risk is taken seriously, thereby increasing employees' willingness to travel.

The new ISO 31031 standard is a good framework to ensure traveller health and safety programmes are resourced adequately and managed effectively.



Travel is returning, but with more caution and scrutiny. Trip approval from a business as well as a health and safety perspective will become the norm."

Dr Myles Druckman,

Senior Vice President & Global Medical Director, International SOS



Most likely to impact business travel in the next 12 months:



Base: All respondents responsible for supporting business travellers (768)

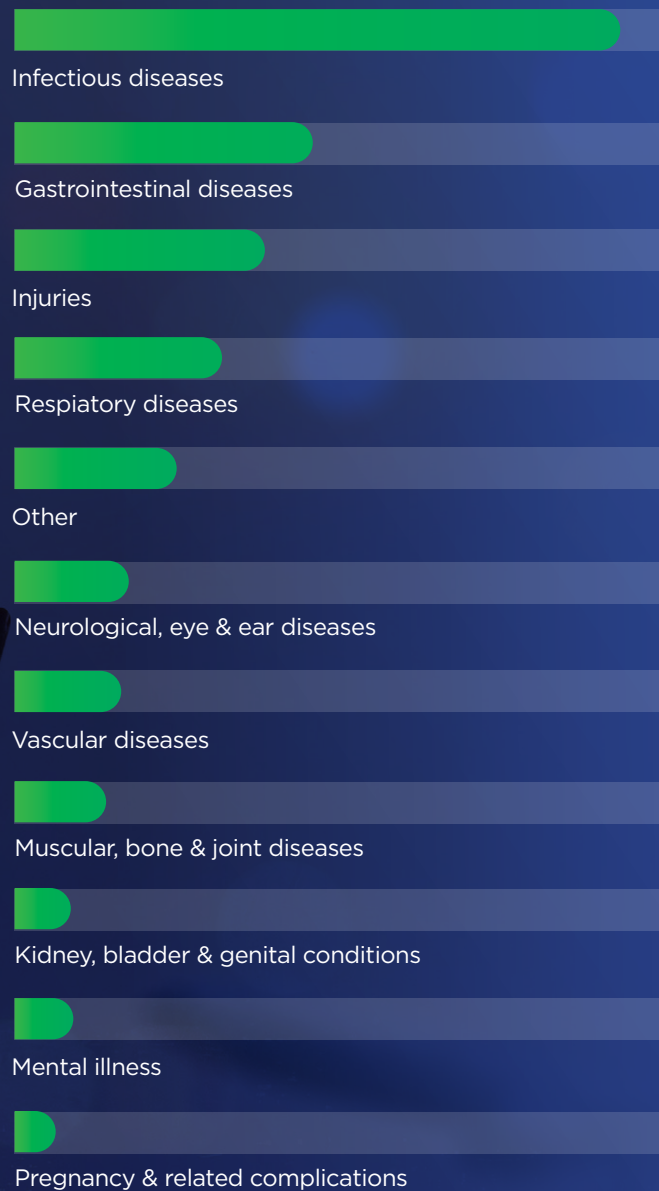
New self-assessment tool - benchmarking your organisation against ISO 31030

To evaluate your travel risk approach, our security and health experts have created a five-minute assessment which provides a customised report that you can take directly to your management.



[START YOUR FREE ASSESSMENT](#)

Assistance provided to our subscribers:



International SOS assistance case data
January 2022 - October 2022



For every **security incident**
seen in our assistance centers
this year, there are
7 health incidents.

**76%****Medical assistance****11%****Security assistance****13%****Travel assistance**

Although our survey shows that the majority of respondents are most concerned about security threats, the reality is travellers most often need help with health issues. Everyday health risks have not diminished. For every security incident seen in our Assistance Centers this year, there are seven health incidents. The top health problems outside of COVID remain injuries and accidents, gastrointestinal and respiratory illness, and heart attacks and strokes. Many of these incidents are considered preventable.

The in-person mass gatherings that were put on hold during the pandemic are returning. The risks to the health of individuals attending, the possibility of an outbreak at the event, and the potential for these gatherings to precipitate global spread cannot be overlooked. Monkeypox is one example – prior to 2022 it was generally present only in Central and West Africa. Following international mass gatherings, over 80,000 cases of the disease have now been reported from more than 100 countries, with the World Health Organisation declaring a Public Health Emergency of International Concern in July 2022. Organisations intending to resume their international meeting schedules will be expected to protect their event and their travellers from common infections such as flu, as well as unusual and emerging diseases.

In addition, travel disruption due to COVID-19 will remain a risk. Trip delay due to a positive test or COVID illness will continue to be common.

Risk Management:

- Organisations should ensure their travellers are fully briefed on health and security risks of travel and their destination. This could be through mandatory pre-travel activities such as e-Learning and a medical assessment.
- Digital controls allow itinerary and dynamic tracking, checking in, and in the event of emergency the ability to identify 'exposure' and respond.
- For the individual traveller, carrying a travel health kit, bringing extra doses of their prescription medication in case of delays, and having a plan if assistance is needed, should be routine.
- Managers will continue to need data and processes to help them assess and approve travel as they have done during the pandemic and will do into the future as new challenges will arise.
- Evaluation and review of an organisation's travel risk management programme using a framework such as the new ISO 31030 standard.



Climate change and other forces are increasing health risks with wide ranging impacts

Commentary:

The “unusual” outbreaks of the 21st century including SARS, Ebola, COVID-19 and Monkeypox, are now regularly in the headlines*. Climate change is increasingly recognised as a contributing factor in accelerating the emergence of infectious diseases**.

As the COVID-19 pandemic continues, the responsibility for mitigating health and economic impacts shifts from governments and health authorities, to businesses and individuals. Maintaining enthusiasm and commitment to reduce transmission is a difficult task, made even more challenging by competing crises as we head into 2023.

Infectious diseases have the potential to cause large numbers of illness and deaths, but also significant social and economic distress. The risks are foreseeable and rising. The magnitude of the risks to individuals, organisations and society should not be underestimated. Whilst Health is often considered within the Environmental, Social and Governance framework, public health experts argue that a greater focus is needed on employee wellbeing and global health equity if we are to lessen the impacts.

Climate change is expected to accelerate mosquito-borne diseases as temperatures and standing water

increase. We could see outbreaks of Malaria, Dengue Fever and Zika in places where they have never been present before, and more frequent outbreaks in areas where they already exist. Extreme heat and cold will affect new populations who may not be prepared for it. Power shortages may exacerbate the situation. Wildfires, floods, drought and deforestation may bring wildlife closer to human habitation increasing the risk of new diseases evolving. We do not yet know the consequences of the permafrost melting and releasing novel once-frozen pathogens. All these factors in combination with an increasing world population and density is a potential potent mix for infectious disease outbreaks

Finally, while the COVID-19 pandemic has caused institutional exhaustion, we need to remain vigilant for the inevitable next influenza pandemic. It has been 13 years since the H1N1 pandemic, and we know historically that we will be faced with an influenza pandemic every few decades, so we cannot drop our guard.

*Baker, R.E., Mahmud, A.S., Miller, I.F. et al. Infectious disease in an era of global change. *Nat Rev Microbiol* 20, 193–205 (2022).

**Bloom, D.E., Black, S., Rappuoli, R. Emerging infectious diseases: A proactive approach *PNAS*, Vol. 114 | No. 16 April 18, 2017.



A lot of people talk about climate change now, but one of the things that I found is that climate change is not in isolation, it's climate change acting in convergence with those other forces, urbanisation and political destabilisation and deforestation. And then one of the most potent risks is this rise in anti-science, which in itself is a social force.”

Dr Peter Hotez,

Internationally-recognised physician-scientist in neglected tropical diseases and vaccine development



Risk Management:

- Organisations must ensure that Health Security is included in their Environmental, Social and Governance framework.
- Undertake risk assessments of existing and potential health threats, incorporating forecasts for potential geographic extension of hazards due to climate change and other forces.
- Crisis and business continuity plans should utilise an “all hazards” approach. Include known and potential health threats, with scenarios encompassing likely, as well as the unlikely worst case.

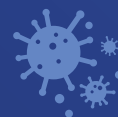


Global infectious disease epidemics and pandemics will increase in severity, just as catastrophic weather events are increasing in severity. But the forces driving infectious disease are more complicated in some ways than just the catastrophic weather events.

It's going to be up to the CEOs of the companies to take greater responsibility for their own employees' health. And too often I think corporate medical departments are too small and not necessarily prepared for what's ahead. There seems to be a lack of expertise and a need to look at the big picture for catastrophic global infectious disease events. The question is, where do you go? And I don't have an easy answer for that.”

Dr Peter Hotez,

Internationally-recognised physician-scientist in neglected tropical diseases and vaccine development



Only 25%

said their organisation is actively planning for future pandemics and COVID-19 variants.

Base: All respondents (1218)

5

Workforce wellbeing, the happy at work equation (A+B+C)-D

The COVID-19 pandemic was an accelerant for mental ill health globally, with levels of mental health conditions such as anxiety and depression increasing by more than 25% during the pandemic.* Unfortunately, the pandemic represented the start of a flood of news events with global impact: race-related civil unrest, wildfires caused by escalating global temperatures, conflict in Ukraine and a cost-of-living crisis. The rapid succession and widespread impact of challenges continues to have negative consequences for mental health globally including organisational outcomes such as work burnout and staff turnover.**

The Risk Outlook survey respondents highlighted the impact that global crises are having on mental health and productivity, with the three most common impacts to domestic employees and remote workers productivity being:

- Cost of living pressures.
- Natural disasters (such as those related to the climate crisis).
- Security threats (such as protests, violence and terrorism).



Don't underestimate the impact (of global crises) on employee mental health."

Dr Rachel Lewis,
Managing Partner at
Affinity Health at Work



*WHO, 2022.

**The Lancet - Global Health: Mental Health Matters.

Organisations are recognising the increased need to focus on mental ill health, with 90% of respondents stating that their mental health support offerings had either increased or stayed the same in the last year, and 92% expecting that in the next year, this support will continue to either increase or stabilise. Despite the positive message there are barriers to being able to provide the necessary support to employees, with over half respondents citing limited time (56%) and money (51%). This, given rising levels of mental ill health, represents a real risk to organisations.

There is a very clear business case to suggest that investing in mental health initiatives is money well spent. Data from WHO suggests that for every US\$1 spent, the return on investment will be over US\$4. It is vital however that organisations invest in the right support and interventions which will have the greatest impact on employee outcomes and mental health.



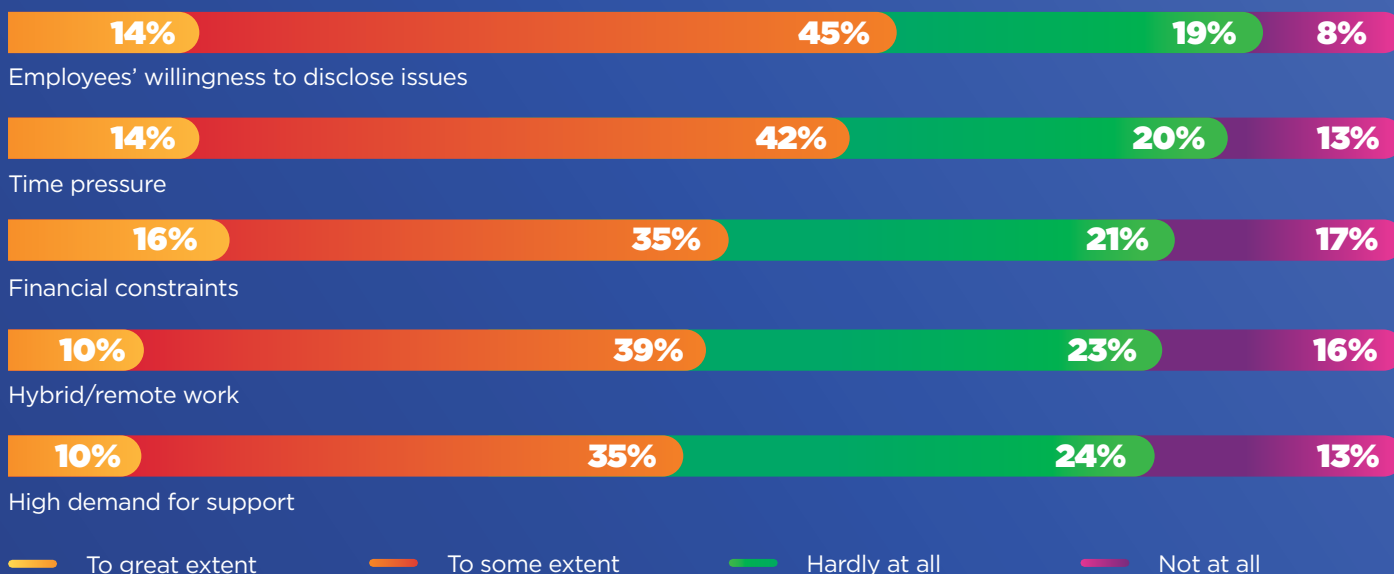
As asserted by the recent WHO Mental Health at Work guidelines, although necessary, only offering training and development (such as stress management or resilience) or only offering support to those who are struggling (through, for instance, EAPs) is not enough to manage wellbeing effectively. The focus must be on prevention."

Dr Rachel Lewis,
Managing Partner at
Affinity Health at Work



In the last year there has been a proliferation of new legislative requirements (such as those in Australia), frameworks (such as ISO 45003) and guidelines around mental health (such as the WHO Mental Health at Work guidelines), all of which focus on the importance of providing good working conditions for employees through well managed jobs.

What is impacting an organisations ability to provide mental health and financial wellbeing support?



Base: All (1,218)



92%

of organisations plan to increase or keep the same level of mental health support.



86%

of organisations plan to increase or keep the same level of financial wellbeing support.

US\$ 1 trillion

= Lost productivity as a result of anxiety and depression

US\$6 trillion

= Projected total cost of poor mental health and lost productivity to the global economy in 2030



The financial crisis is already having a huge impact on levels of mental health and ill health, such as anxiety issues.”

Dr Peter Hotez,

Internationally-recognised physician-scientist in neglected tropical diseases and vaccine development



Risk Management:

- Focus on preventing mental ill health and fostering wellbeing, build a healthy working culture using the wellbeing equation.
- Increase resources for all such as providing autonomy, belonging and competence to employees. Doing so will mitigate the impact of high demands.
- Focus on reducing demands (such as unmanageable workload or work pace).
- Understand the working conditions within your organisation. This might be through existing data such as employee surveys, or through conducting a psychosocial risk assessment.
- Focus on upskilling line managers with the skills, resources and conditions to manage stress in others.



Most of our research shows that line managers, whatever the job, are integral to managing mental health in employees. This is because line managers by their behaviour can cause stress (or enable employees to thrive), they can buffer against those demands (for instance getting more resources on board when workload is too high) and they can signpost employees to sources of support.”

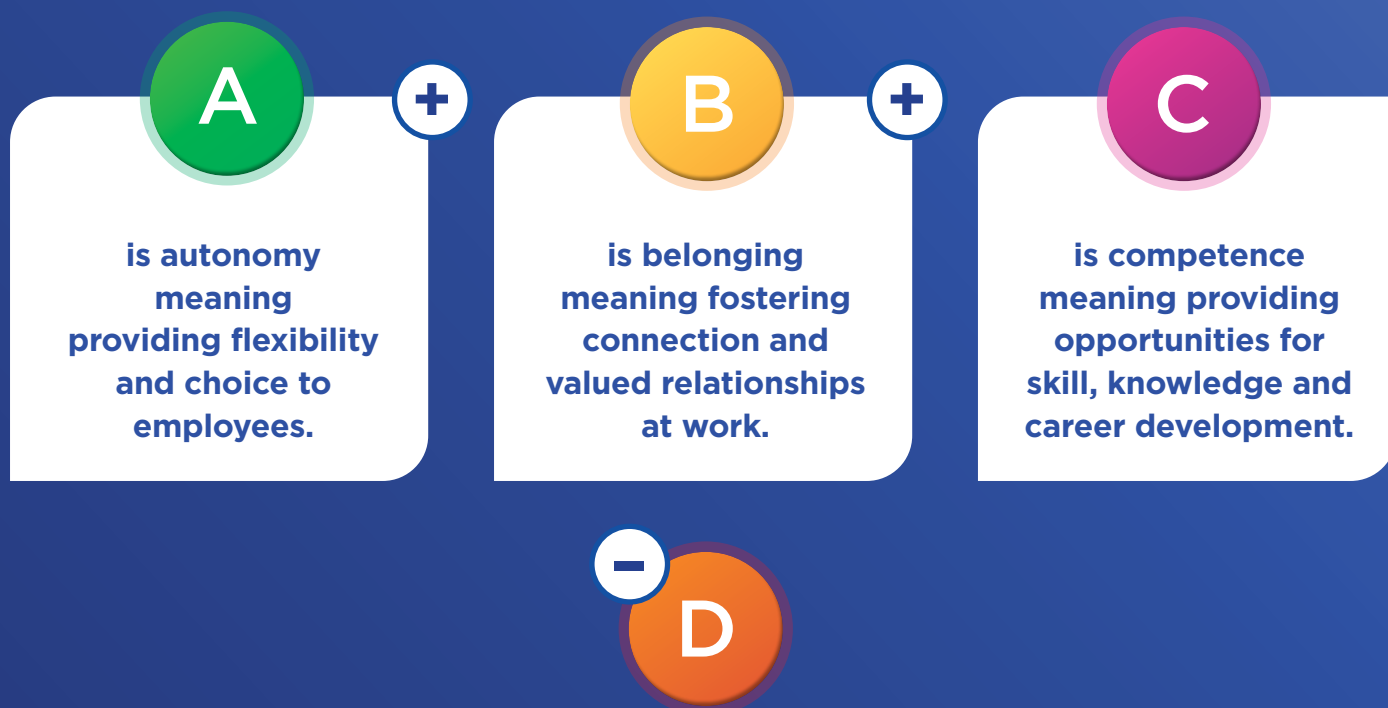
Dr. Rachel Lewis,
Managing Partner at
Affinity Health at Work



Managing wellbeing in the new era by focusing on working conditions – the Wellbeing Equation

$$\text{Wellbeing} = (A + B + C) - D$$

Resources: A + B + C are those resources, elements at work that enable people to thrive.



Examples include unmanageable workload, work pace, working hours or exposure to harmful materials or behaviours (like bullying and harassment).





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