Security State of the Industry: Travel Security

November 2021
Version 1.5

ABBREVIATED VERSION for the SEC COMMUNITY

Report Explanation

By state of the industry the SEC means the condition of the industry on a given security topic. It does not de facto mean "best of." It is not meant to be prescriptive. The information should be viewed as a snapshot in time and a range of practices or data points. A later reassessment of the topic could result in a different view depending on where the information comes from or if more information is being shared publicly. Or -- it could represent a true shift in thinking and practice. However, with this kind of data gathering there is no way to know for sure.

While the SEC always want to include bleeding edge information when it can, early trends are not always easy to identify. In some case new innovations are not shared widely. Otherwise, the information is a range of what people are currently reacting to, researching or what practitioners say they are doing.

Why are we creating these? For many topics in security there just is not a comprehensive set of information to be had. It comes in bits and pieces and those bits are not connected. As such, the SEC Security State of the Industry presentations will never be in a "final" state; new versions will be created over time. They represent the best information we could gather at a given point in time.

The SEC gathers the information for these presentations in many ways. We comb the publicly available Internet for information on the topic. We always strive for reliable and vetted information but in its absence will use information that appears trustworthy and unbiased. We ask practitioners and SEC Faculty (subject matter experts) for their successful experiences. We call this "collective knowledge." Collective knowledge takes in information from many and looks for proven practices. We also conduct in-depth survey research and quick polls.

Caveat:
The information contained in this presentation is from many sources; these sources have different drivers for covering the topic. The information is not intended to represent a best practice but rather food for thought on what others are observing or doing. You should only use or act on information that makes sense in your organization.

This Report's Scope Level: Baseline -> Extended   -> Comprehensive

# Table of Contents (Full Report Only)

Executive Summary

Due to the **increase in political unrest, diseases, and travel restrictions** the global market for travel security services is increasing.[1] **Business travel will likely remain low.**[2] The highest fatality risk of US travelers includes **vehicle accidents, homicide, and drowning.**[3] The highest health risks are **diarrheal diseases, mental distress, and COVID-19.**[4] The highest crime risk cities include **Tijuana**, Mexico, **Acapulco**, **Caracas**, and Venezuela.[5] The highest crime risk countries are **Iraq, Afghanistan, and Syria.**[6] **Cyber security is an increasing** threat to travelers.[7] The most common travel security practices of Fortune 500 companies include **travel security awareness, security alerts, and security officers at offshore events**.[8] A successful travel security program builds brand credibility, assures regulatory compliance, mitigates risk, and includes multiple components.[9]

Fortune 500 Research Findings

Typical Fortune 500 Company Travel Security Program Research Findings

- Practices of typical Fortune 500 companies were analyzed resulting in the common travel security practices shown.[10]

- The top three most common practices include:
  - Travel security awareness
  - Security alerts
  - Security officers at offshore events

Typical Fortune 500 Company Travel Security Program Research Findings

Source: Analyst Generated
Data: SEC Subject Matter Experts (former CSOs)
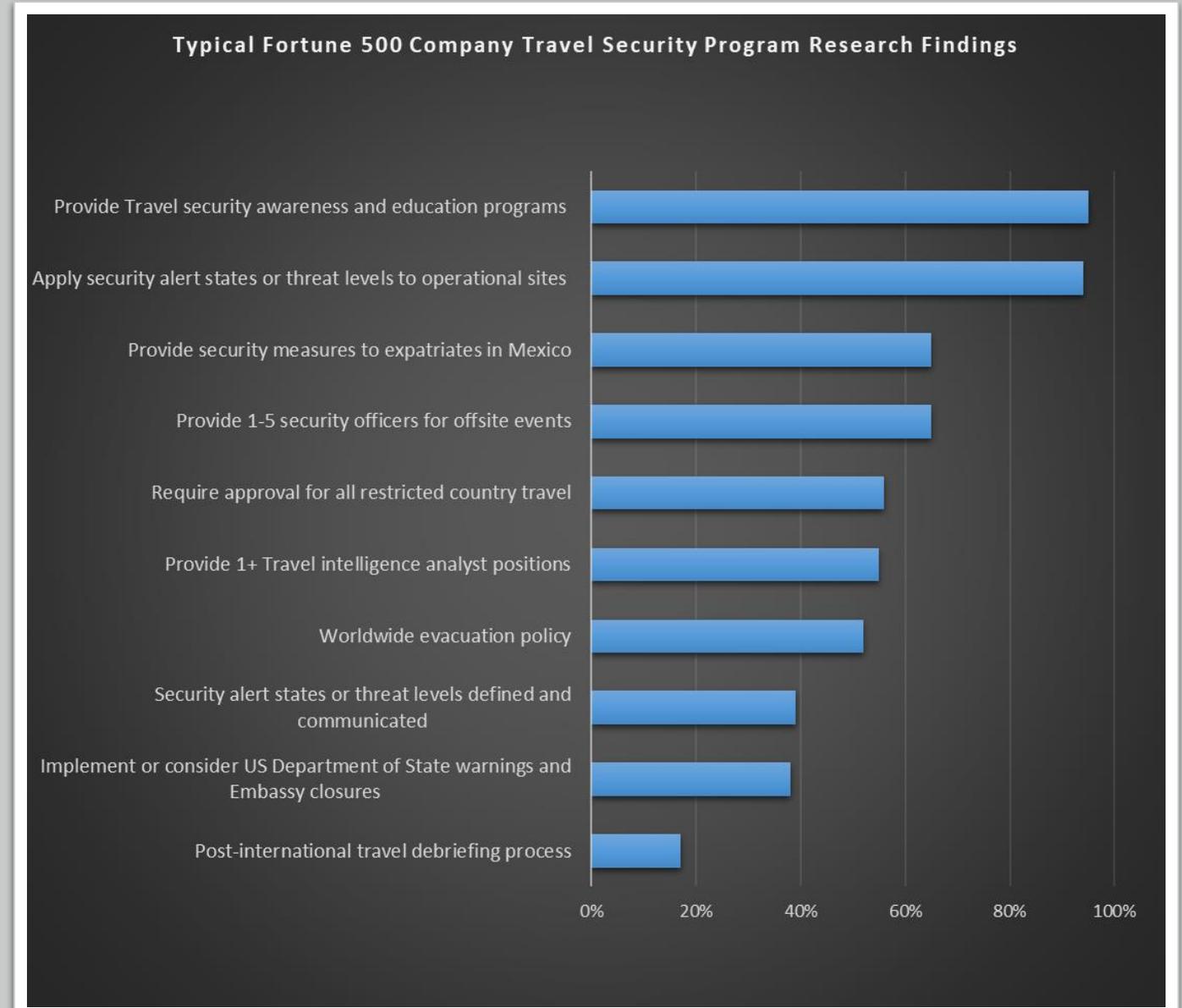
Comprehensive Travel Security Program Elements

(showing 53 out of a total of 103)
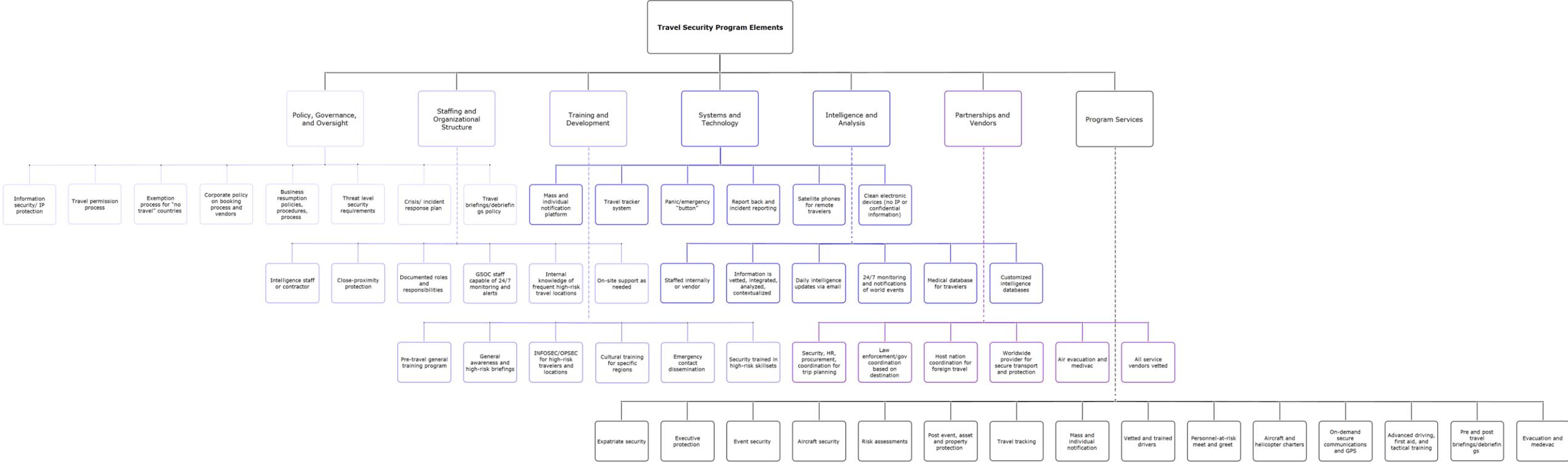
Source: Analyst Generated
Data: SEC Subject Matter Experts (former CSOs)

Industry Overview

Industry Overview

Business Travel Decrease[11]

Likely permeant drop in business travel in comparison to 2019 business travel peak

Travel Management Increase[12]

Global travel risk management is expected to grow 9.1 percent due to the increasing importance of security among business travelers

Post CV-19 Decrease[13]

Even after COVID-19, there will likely be 19 to 36 percent decrease in business travel

CEO Expectations[14]

91 percent of CEOs expect business travel to be less frequent

Communication Technology[15]

The estimated likelihood of the substitution of business travel by communication technologies differs across experts with poor consensus

Carbon Footprint Reduction[16]

25 percent of business executives plan to reduce international travel in the post-COVID era to lessen their carbon footprint

Industry Overview

An expert group consisting of 25 high-level professionals that were carefully balanced to represent the Travel and Mobility Tech ecosystem for the hypotheses.[17] They include representatives from Amadeus, BCD Travel, Skift, Plug & Play, FTE Innovation & Startup Hub, DigginTravel, GeoSure, and other leading companies or organizations from the wider travel ecosystem.

Quantitative answers were made on a 5-point-Likert scale from "Highly likely" to "Highly unlikely".

Hypothesis

Level of certainty
Low — High

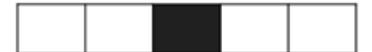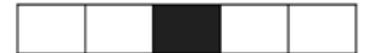| Hypothesis	Level of certainty
Remote work is here to stay with a globally distributed workforce	High
Virtual interaction leads to a hybrid future in business	High
The substitution of business travel by technology is unavoidable	Low
A lasting decrease of business travel is expected but differs across travel motives	Mid
Travel restrictions and shattered traveler confidence drive tech substitution	Low-Mid
Duty of care is a hygiene factor for all business travel	Mid-High
Well-being policies by corporates drive employee satisfaction	Mid-High
Businesses will act on the growing sustainability awareness of travelers	Low-Mid
Travelers become increasingly "empowered" due to tech-enabled self-service	Mid
Business travel will be managed by digital self-service tools and the human touch	Mid-High

Source: Travel and Mobility Tech

Travel Risks

Fatality Risks of US Travelers

Vehicle Accidents:

- Road traffic accidents (RTA) account for 57 percent of travel-related deaths.[18]

Highest Homicide Rates (Reference Annex 2):

- El Salvador and Honduras: The prevalence of gangs in El Salvador and Honduras contributes to their high murder rates.[19][20]
- Venezuela: Corruption of authorities, poor gun control, and a flawed justice system has led to the country's high murder rates.[21]

Drowning:

- Drowning is the 3rd leading cause of unintentional injury death worldwide, accounting for 7 percent of all injury-related deaths.[22]
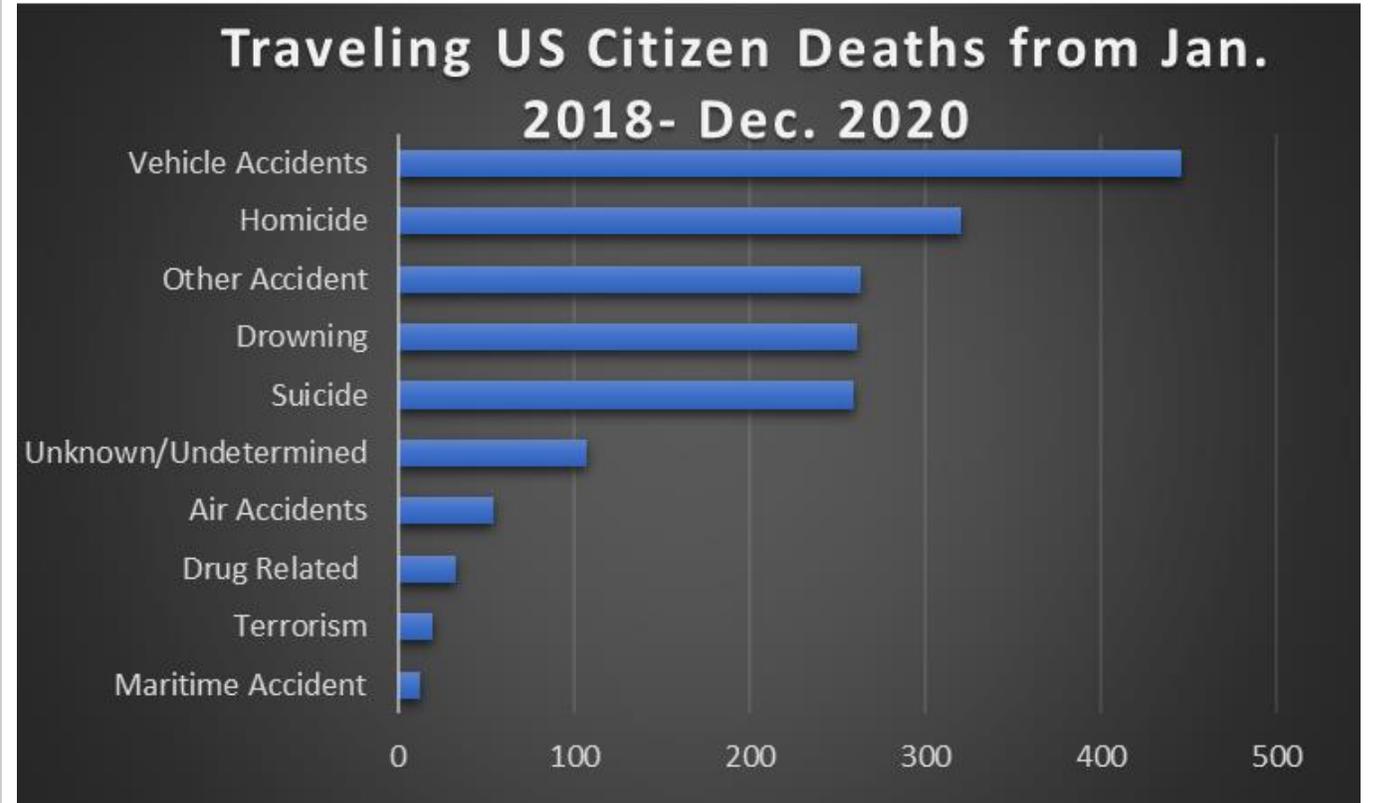
Source: Analyst Generated
Data: US Department of State

US Transportation Risks

- The highest transportation risk in the US is by highway in 2019.[22]

- The total highway fatalities (36,096) are greater than 20 times the combined other modes of transportation.[23]
  - The highest fatalities are passenger car occupants resulting in 12,239 fatalities.

- Ridesharing:
  - Uber rideshares in the US accounted for 3,045 sexual assaults and 58 crash-related deaths in 2018.[24]
  - Ridesharing increased traffic deaths by 3 percent in the US.[25]
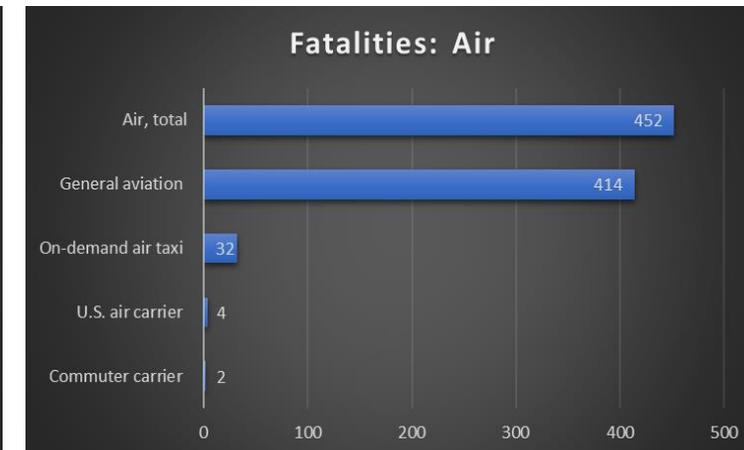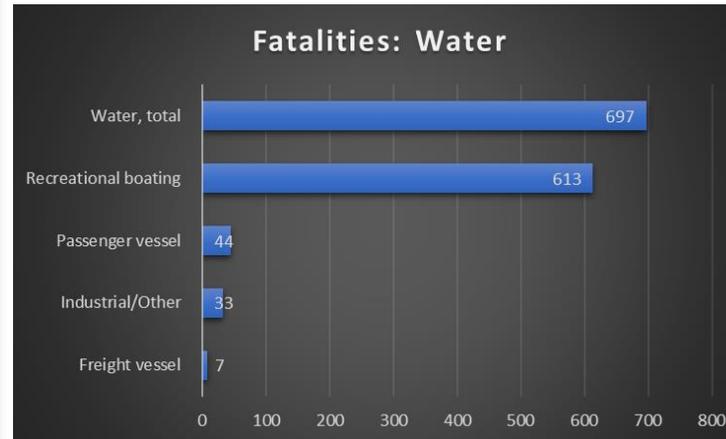
Source: Analyst Generated
Data: US Department of Transportation

Specific Travel Risk Factors

The US State Department categorizes travel risk factors into the following categories:[34]

Crime: Widespread violent, organized, or cyber crime.

Health: Health risks, including current disease outbreaks or a crisis that disrupts a country's medical infrastructure, are present.

Terrorism: Terrorist attacks have occurred and/or specific threats against civilians, groups, or other targets may exist.

Kidnapping: Criminal or terrorist individuals or groups have threatened to and/or have seized or detained and threatened to kill, injure or continue to detain individuals in order to compel a third party (including a governmental organization) to do or abstain from doing something as a condition of release.

Other: Natural disasters, time-limited event, civil unrest
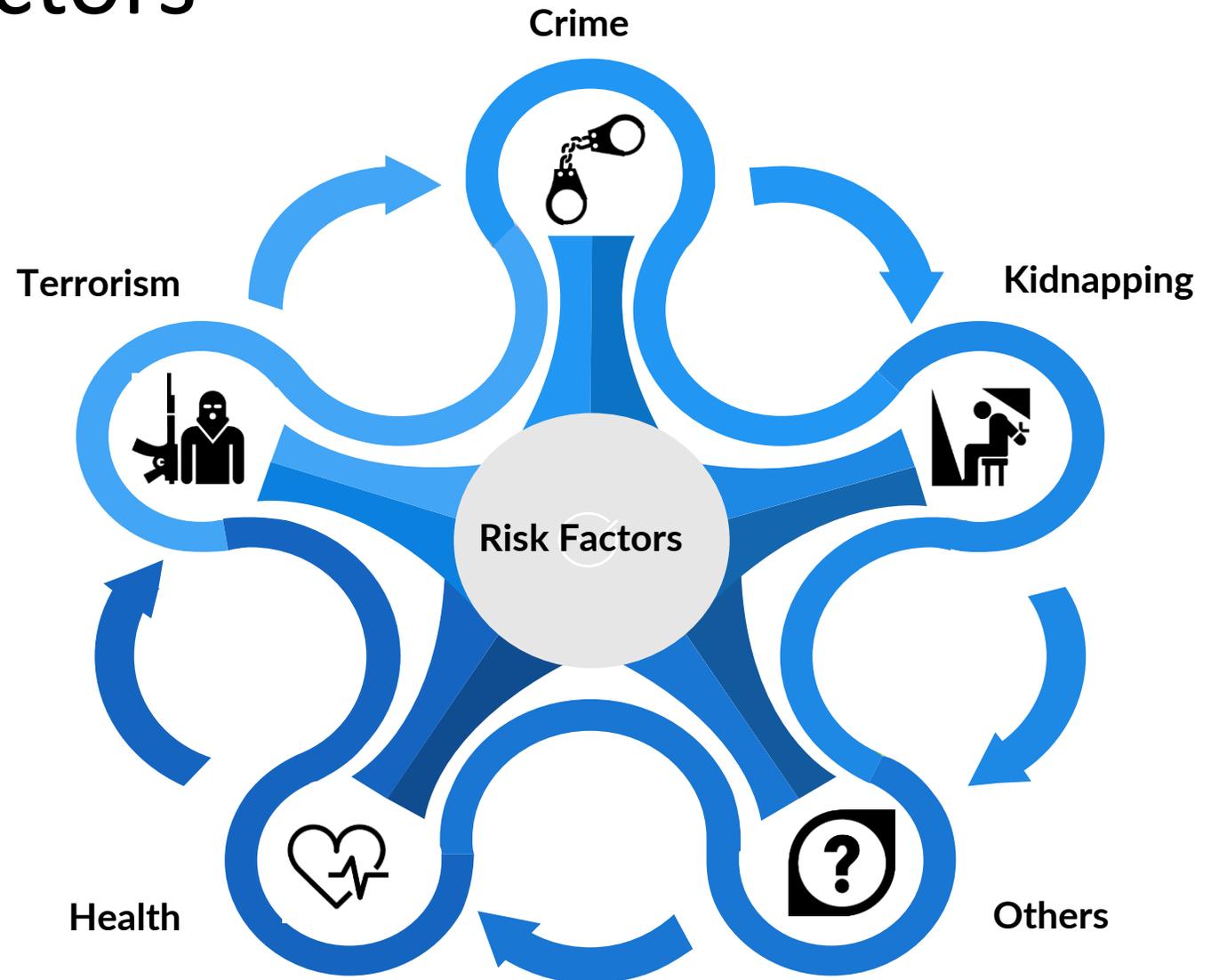
Specific Travel Risk Factors: Crime

Most Dangerous Cities[35]

- Tijuana, Mexico
- Acapulco, Mexico
- Caracas, Venezuela

Most Dangerous Countries[36]

- Iraq
- Afghanistan
- Syria

Cyber Crime[37]

20 percent of travelers are subject to cyber-crime when abroad

Three Risks of Cyber Crime:

- *Unsecured wireless networks:* While public wireless networks provide great convenience, allowing people to connect to the Internet from almost anywhere, they are unsecure and can allow cyber criminals access to your Internet-enabled devices.

- *Publicly accessible computers:* Hotel business centers, libraries, and cyber cafes provide computers that anyone can use. However, travelers cannot trust that these computers are secure. Cyber criminals may have infected these machines.

- *Physical theft of devices:* Thieves often target travelers. Mealtimes are optimum times for thieves to check hotel rooms for unattended laptops.
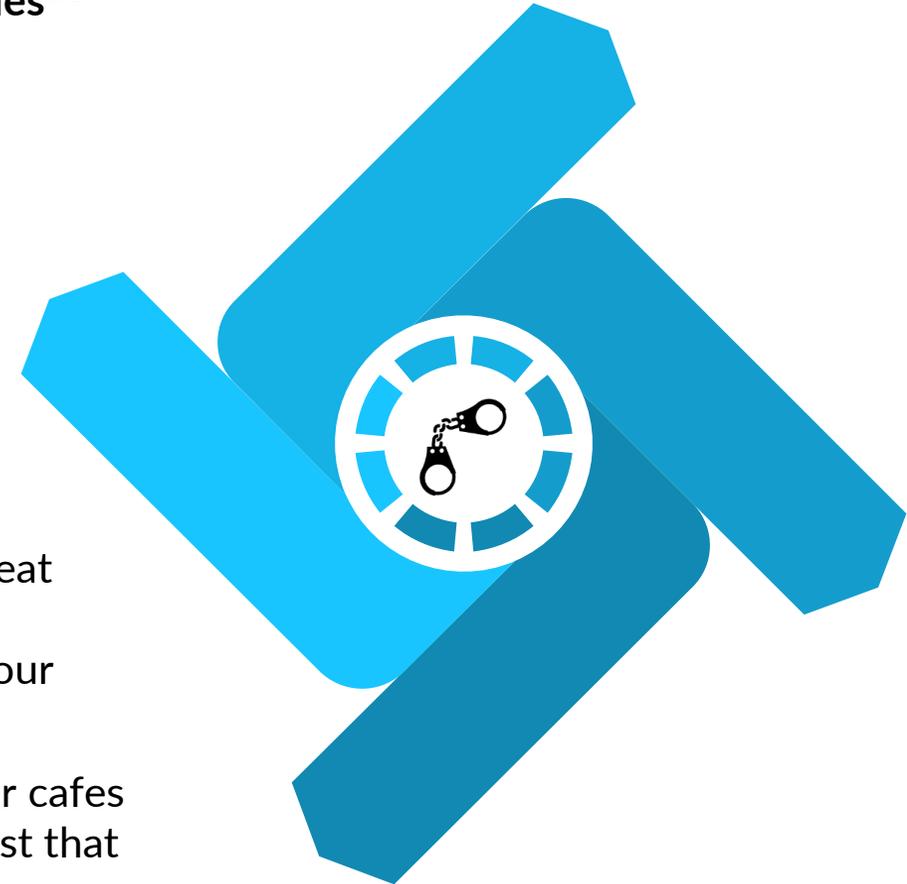
Specific Travel Risk Factors: Health

Environmental Risk	Mental Health Risk	Disease and Illness	COVID-19
This includes altitude, heat and humidity, ultraviolet radiation from the sun, foodborne and waterborne health risks, travelers' diarrhea, recreational waters, animals and insects, intestinal parasites.[38]	Mental disorders are not rare among travelers. Overall, mental health issues are among the leading causes of ill health among travelers.[39]	The most significant disease risk is from diarrheal diseases such as traveler's diarrhea, Salmonella infections, Giardiasis, and Cryptosporidiosis. Malaria is prevalent in the tropics and sub-tropics of all countries (Reference Annex 4 for list of high-risk diseases for travelers).[40]	Many countries are restricting travel under specific circumstances, and some require COVID-19 test. [41] During air travel, the risk of COVID-19 is lower than from an office building, classroom, supermarket or commuter train due to proper airflow. It takes the ventilation system of a plane six minutes to reduce the number of viral particulates in the air by 99.9 percent.[42]

Specific Travel Risk Factors: Other
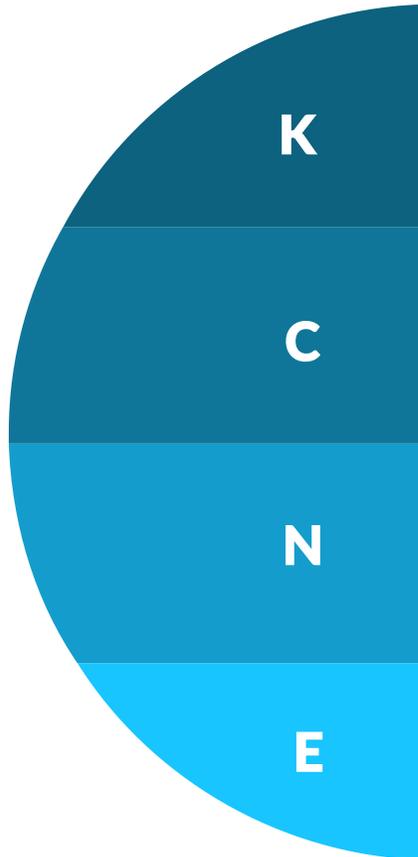
K	**Kidnapping**	200-300 Americans are kidnapped overseas each year.[44]
C	**Civil Unrest**	Political, economic, religious, and/or ethnic instability exists and may cause violence, major disruptions, and/or safety risks.[45]
N	**Natural Disaster**	A natural disaster, or its aftermath, poses danger.[46]
E	**Time-limited Event**	Short-term event, such as elections, sporting events, or other incidents that may pose safety risks.[47]

Corporate Travel Policy[48]

Travel Policy Essentials

- ✈ Air Travel
- 🛡 Duty of Care
- 🚌 Ground Transportation
- 💵 Miscellaneous
- 📞 Telecommunications
- 🌐 Bleisure
- 💲 Expense Reimbursement
- 🏢 Lodging
- 🗺 Relocation
- 💻 Travel Booking Tools
- ⭐ Compliance and Distribution
- 🎁 Gifts and Entertainment
- 🍎 Meals
- Stakeholders and Ownership
- 👍 Trip Approval Workflow

Source: Citi

Duty of Care

Duty of Care (DOC):Legal Responsibly

Scope[53]

Obligation to follow both US and international laws of duty of care for business travelers.

Policy[54]

US Occupational Safety and Health Administration (OSHA) regulations to provide a safe work environment.

Responsibly[55]

Employers must demonstrate they have prepared their employees for the risks associated with travel as well as how to respond to these risks. Employers must also consistently monitor destinations for changing conditions so they can quickly support and communicate with their employees.

Duty of Care

Liability[56]

For business travel within the US, employer liability is limited to workers' compensation. Once an employee gets a certain distance from where the business is located (distance varies from state-to-state) workers' compensation no longer provides coverage.

Counties with Degree of Corporate DOC Policies[57]

Australia, Belgium, Canada, France, Germany, Netherlands, Spain, UK, and the US.

Indistinct Lines[58]

There is no clear line of case law on which an employer can rely when evaluating the risks of sending its employees abroad.

Appendices

Annex 5 : Travel Security Program Self-Assessment (Yes/No)

1. Do employees regularly travel overseas?

2. Does the organization provide a clear and assessable travel security policy?

3. Does the organization's policy include duty of care?

4. Does the organization ensure cyber security measures are in-place while traveling abroad?

5. Does the organization provide a risk assessment of travel (country/city/site, airlines, transportation, hotels)?

6. Does the organization prescreen the employees for travel (health)?

7. Does the destination country have an adequate health care system?

8. Does the program provide travel security awareness and education programs?

9. Does the program provide security alerts or threat levels to operational sites?

10. Does the program include a travel crisis and critical incident response plan?

If answered "no" to three or more questions (not including first question), the organizations travel security program requires evaluation.

References

References Evaluation Sheet Example: High, Medium, Low

Trust Scale and Web Site Evaluation Worksheet

Enter URL: unodc.org/documents/data-and-analysis/

Criteria	Tips	Value	Enter y or n	Score: 52.88	
Content can be corroborated?	Check some of the site's facts	5.17	y	5.17	**40.00= High Credibility**
Recommended by subject matter expert?	Doctor, biologist, country expert	4.94	y	4.94	**35.06= Medium Credibility**
Author is reputable?	Google for opinions, ask others	4.64	y	4.64	**21.00= Low Credibility**
You perceive site as accurate?	Check with other sources; check affiliations	4.56	y	4.56	**7.46= Not Credible**
Information was reviewed by an editor or peers?	Science journals, newspapers	4.52	y	4.52	
Author is associated with a reputable org?	Google for opinions, ask others.	4.42	y	4.42	
Publisher is reputable?	Google for opinions, ask others.	4.02	y	4.02	
Authors and sources identified?	Trustworthy sources want to be known	3.78	y	3.78	
You perceive site as current?	Last update?	3.78	y	3.78	
Several other Web sites link to this one?	Sites only link to other site they trust	3.68	y	3.68	
Recommended by a generalist?	Librarian, researcher	3.65	n	0	
Recommended by an independent subject guide?	A travel journal may suggest sites	3.56	n	0	
Domain includes a trademark name?	Trademark owners protect their marks	3.45	y	3.45	
Site's bias in clear?	Bias is OK if not hidden	3.06	y	3.06	
Site has professional look?	It should look like someone cares	2.86	y	2.86	
Total		**60.09**		**52.88**	

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About Us

The SEC is the leading research and advisory firm focused on security risk mitigation solutions. Having worked with hundreds of companies and organizations we have witnessed the proven practices that produce the most positive transformation. Our subject matter experts have deep expertise in all aspects of risk mitigation strategy; they collaborate with those that have security responsibilities to transform programs into more capable and valued centers of excellence.

The Security Leadership Research Institute (SLRI) is dedicated to providing independent and actionable research to the security and risk community. The SLRI was formed as a result of the need by the security industry to document the entire spectrum of risk mitigation and security through research.

Special thank you to Jacob Maynard, our intern from Mercyhurst University, who helped us with this report.