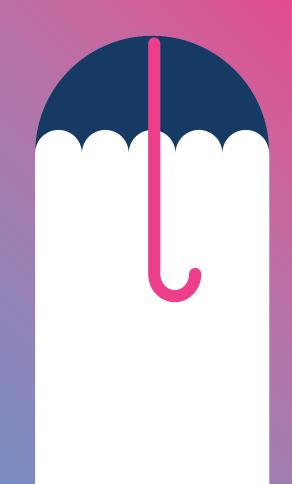
## That was then, this is now.





outbreak?

the spread of COVID-19 is changing rapidly – not only by the day, but throughout the day. In early February, the focus was largely on China and some surrounding countries. But this new disease is now having a much greater global impact. How has the

business perception changed from February to March 2020?

## As the impact increases, so does the concern; **66%** of companies are now **very** concerned. **February** March

How concerned are companies about the COVID-19



## **February** March

remotely to minimize exposure to COVID-19?

Yes, globally

No real change for those already encouraging remote working, but **49%** are now

• Yes, in affected **locations** 

Not yet, but

monitoring the situation.

monitoring the situation

No

- \* China and surrounding areas
- global outbreaks? As the rapid spread of COVID-19 takes hold, more companies are starting to put

their preparedness plans into motion.

Do companies have a business continuity plan or pandemic preparedness plan in place to handle

**February** March Yes, we have begun implementing the plan

Yes, but we have not



Yes, expatriates and

families have been or

are in the process of

• No, monitoring the

situation

locations.

**February** 

process of developing a plan No

plan

yet implemented the

No, but we are in the

March

**February** 

## being evacuated from the affected locations Yes, but only families have been or are being

evacuated

 No plans to evacuate \* China and affected locations Have companies banned or limited business travel

March

**63% 56%** in an effort to minimize exposure to COVID-19? Travel bans have increased overall, and the focus is not necessarily on the affected Yes, banned all travel globally Yes, banned all travel to affected locations

Yes, banned

globally

Yes, banned

Not yet, but

situation

monitoring the

nonessential travel

nonessential travel

to affected locations

\* China Have companies recalled any business travelers?

Yes, recalled all

• Yes, recalled all

• Yes, recalled all

Yes, recalled all

travelers from

affected locations

nonessential travelers

nonessential travelers

from affected locations

travelers

- No

**February** 

Only a slight increase in recalling business travelers, primarily non-essential travelers;

the bigger shift is for the 46% who are now monitoring this more closely.

March

12%

8%

Quarantine or self-imposed isolation after travel is becoming common practice for **52%** of companies. **February** March Yes, for business and

Yes, for business

travel only Not yet, but monitoring the situation

personal travel

No

- Not yet, but monitoring the situation No
- Have companies instituted any mandatory quarantine or self-imposed isolation periods following travel to locations with confirmed cases of COVID-19?

\* China