AI FOR TRAVEL

GRAND PALAIS

Adopt AI

Report & Replays

Adopt AI Summit **2025 edition at a glance.**

20.000 attendees

1.000+ CEOs

3.000+ CXOs

650+ speakers

250+ exhibitors

7 stages

35+ country delegations

70+ country represented

14 country booths

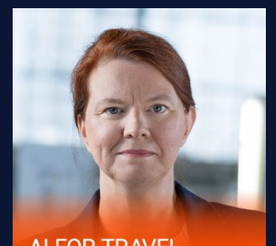
AI for TRAVEL speakers.

REPLAYS

AI FOR TRAVEL

Florent Bernard
Managing Partner and Global Lead of Travel, Tourism & Transportation Practice

ARTEFACT



AI FOR TRAVEL

Anne Pruvot
CEO

SNCF CONNECT & TECH

AI FOR TRAVEL

Rémi Maumon de Longevialle
CEO

VINCI AIRPORTS

AI FOR TRAVEL

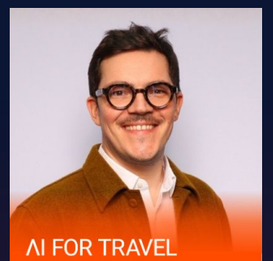
Sylvain Roy
CTO

amadeus

AI FOR TRAVEL

Siddhartha Chatterjee
Global Chief Data & AI Officer

Club Med



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Corentin Rosado
Head of AI GTM international

asana

AI FOR TRAVEL

Sidney Zeder
AI & Data Consulting Senior Director

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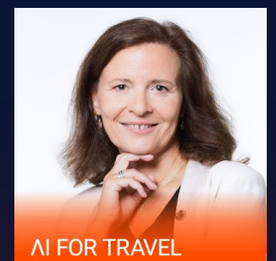

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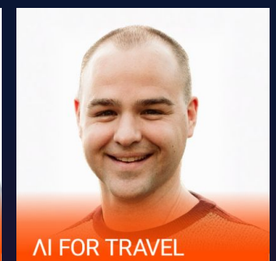
Stéphanie Charlaix Meyer
SVP Customer Service

AIRFRANCE KLM



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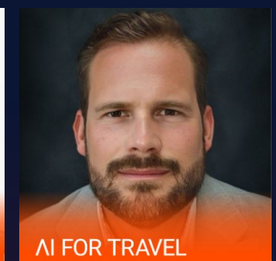
Dane Molter
SVP, Navan Group Travel Marketplace

navan



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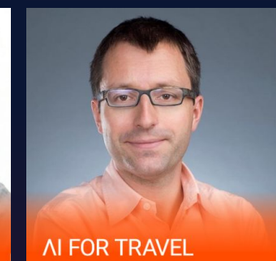
Simon Wieschemann
Executive Vice President Global Accounts

AI FOR TRAVEL

Gilles Karlé
COO

KIWI.COM



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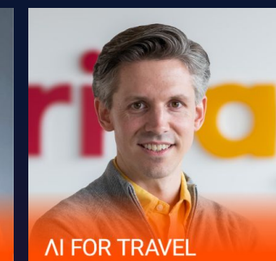
Matthias Keller
CPO

KAYAK



AI FOR TRAVEL

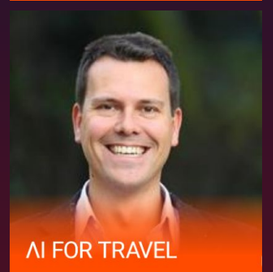
Johannes Thomas
Managing Director & CEO

trivago

AI FOR TRAVEL

Yannick Devaux
Innovation Director

amadeus



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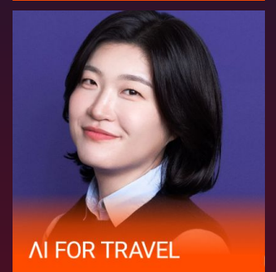
Olivier Kuffler
AI Program Director

amadeus



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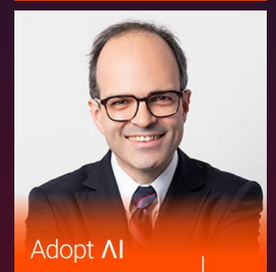
Hannah SON
Founder

tip



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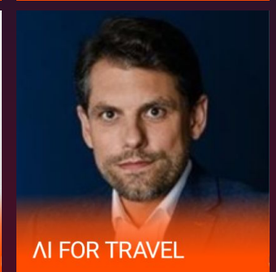
David Krieff
CIO

GROUPE ADP

GROUPE ADP



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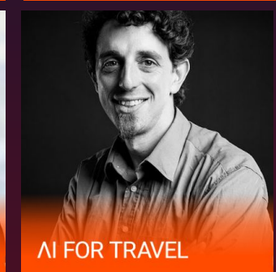
Nicolas Paepegaey
Chief Transformation Officer

Louvre Hotels GROUP

AI FOR TRAVEL

Leif Vase Larsen
CEO International

DERTOUR GROUP



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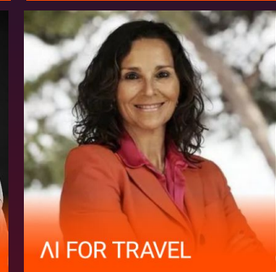
Jonathan Huffstutler
Marketing Director

EONA-X



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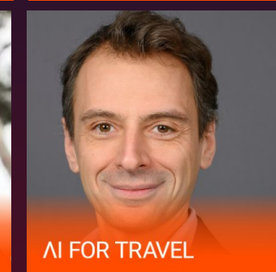
Dolores Ordoñez
Director at AnySolution (coordinator of DEPLOYTOUR)

ANYSOLUTION



AI FOR TRAVEL

Christophe Strobel
Deputy Director of Tourism

MINISTÈRE DE L'ÉCONOMIE DES FINANCES ET DE L'INDUSTRIE

KEY HIGHLIGHTS AI FOR TRAVEL

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AI for Travel has sharpened the strategic roadmap for the industry's next defining chapter. These are not observations; they are the core strategic imperatives now confronting industry leadership:

- **From Transactions to Experiences:** The strategic mandate is to pivot from selling commoditized products, like airline seats and hotel rooms, to architecting hyper-personalized, end-to-end traveler journeys. This shift requires the sophisticated analysis of traveler data to create unique, tailor-made experiences that anticipate needs and adapt in real-time at every point in the journey.
- **Operational Reinvention:** The C-suite must deploy AI to revolutionize core operations, moving far beyond incremental gains. The imperative is to fundamentally transform critical functions like passenger flow forecasting, resource planning, and asset management, unlocking unprecedented levels of productivity and reallocating human capital from routine tasks to high-value strategic work.
- **The New Customer Interface:** Leadership must strategically deploy AI-powered agents as the new frontline for customer engagement. This is not merely about cost-saving automation; it is a fundamental redesign of customer service that handles routine inquiries at scale to empower human staff for the complex, high-value, and empathetic interactions that build loyalty.
- **Ecosystem-Driven Innovation:** The imperative is to champion secure and sovereign data collaboration across the entire travel ecosystem. This means building decentralized data spaces that break down traditional silos, allowing entities to unlock new forms of shared value and solve industry-wide challenges, from disruption management to sustainability, that are impossible for any single entity to tackle alone.
- **Workforce and Business Model Transformation:** Leaders must drive a profound restructuring of the workforce and established business models in response to AI. This requires a massive commitment to upskilling, reimagining existing roles, and creating new functions like AI-enabled process design, all to build an organizational structure where human creativity and strategic oversight steer automated execution at scale.

To lead your organization through this era of change, it is essential to internalize these strategic principles. We encourage you to explore these themes in greater depth by watching the full session replays, an essential resource for your strategic planning and execution.

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MAINSTAGE

25 - 26 November, 2025.

AI For Travel Grand Palais Opening Words - Day 1.

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Florent Bernard, Managing Partner and Global Lead Travel & Tourism

ARTEFACT

About Floren Bernard: Floren Bernard is a Managing Partner at Artefact, where he leads the global Travel, Tourism, and Transportation practice. He specializes in leveraging data and AI to transform industry operations, focusing on predictive maintenance and hyper-personalized customer experiences.

About Artefact: Artefact is a global data and AI consulting services company headquartered in Paris, France, with approximately 2,000 employees worldwide. The firm bridges the gap between strategy and engineering to help organizations transform data into tangible business value and accelerate AI adoption.

- **Deep Impact Across Three Pillars:** The AI transformation is structured around three key impact zones: enhancing Guest Experiences, optimizing Operators' day-to-day work, and redefining the roles of Teams/Collaborators.

- **The Ultra-Personalization Imperative:** The primary shift in guest experience is the demand for ultra-personalization. Guests are moving beyond seeking generic products (a seat or a room) toward demanding specific, tailor-made travel experiences from the inspiration phase through planning and the travel duration itself.

- **Operational Efficiency via Generative AI:** For operators, AI extends beyond traditional planning and forecasting to directly improving deep operational mechanics, such as leveraging generative AI for complex tasks like maintenance and housekeeping scheduling/planning.

- **Refocusing Human Capital:** AI's greatest strategic value is in empowering teams by automating "shallow work," allowing collaborators to focus their energies and resources on "hardcore deep thinking" and "deep work," thereby reinventing core business processes for non-incremental value creation.

- **The Scope of Transformation:** The industry is moving past discussions of minor, incremental value gains toward a total reinvention of business processes, making AI a "key topic" for enterprise-wide transformation in the coming years.

- **Conclusion:** Executives must recognize AI's comprehensive scope—it is not a small, isolated topic—and actively learn from peers' successful use cases and work stories to inform their own full-scale company transformation roadmap.

> *"We are looking at transforming the core of your companies by reinventing business processes."*

Generative AI: Dare to Experiment, Deploy with Care.

Anne Pruvot, CEO

About Anne Pruvot: Anne Pruvot has spent 25 years helping French and international companies in the mobility, transportation, and tourism sectors transform their business models. In 2017, she joined Oliver Wyman as a Partner, overseeing digital transformation for the transportation and services sectors. Throughout her many assignments, she repeatedly supported SNCF projects, from the launch of the first versions of voyages-sncf.com (later oui.sncf, now sncf-connect.com) to helping define the SNCF Group's digital roadmap.

About SNCF Connect & Tech: is the digital innovation hub of the SNCF Group, responsible for developing SNCF Connect and other tech solutions that make sustainable mobility easier and more accessible. The company designs **platforms**, **apps**, and **mobility services for travelers** as well as for public and private transport partners. With its Tesmo brand, it also provides custom mobility technology beyond the SNCF ecosystem, helping drive greener, smarter travel through digital innovation.

- **Risk Mitigation and Autonomy Level:** The implementation strategy is highly pragmatic and defensive, prioritizing the mitigation of legal, cybersecurity, and ethical risks. Consequently, the company is primarily focusing on AI autonomy levels that retain human supervision in implemented use cases, though they continue to experiment with all levels.

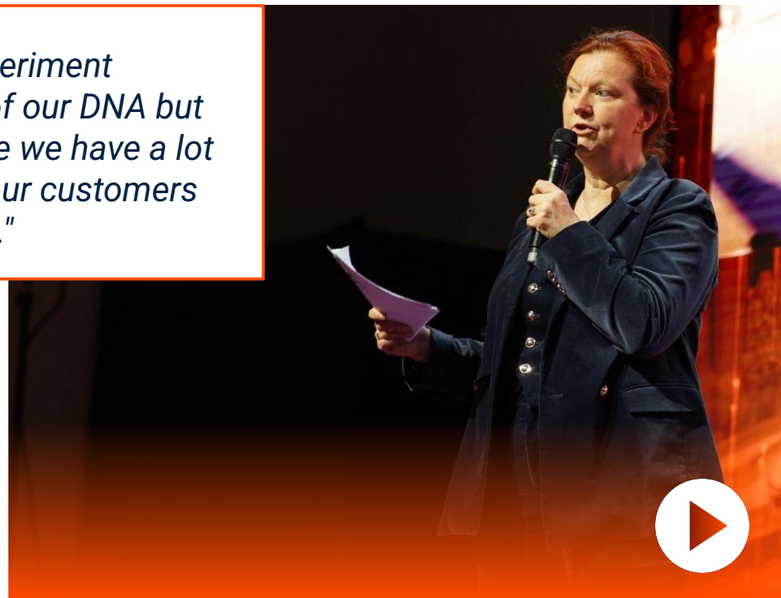
- **Use Case 1:** Developer Productivity: AI was adopted to increase productivity, primarily through tools like GitHub Copilot. The selection criteria for these tools were dual: high adoption by internal teams and a strong guarantee from the provider to preserve intellectual property (IP).

- **Use Case 2:** Customer Relationship Management (CRM): AI is employed as assistance for human agents, helping them navigate complex business rules and thereby increasing their efficiency so they can focus on complex cases and empathy. Furthermore, a large language model (LLM) chatbot has been implemented over one year to increase the number of chat users who do not require human assistance.

- **Ecosystem Leadership:** SNCF Connect & Tech is actively fostering the external AI ecosystem, having recently launched an open-source AI startup program with major partners like Meta, Hugging Face, and HEC to support promising AI use cases in mobility.

- **Conclusion:** The ultimate vision is that "AI will change everything, but only if we use it with purpose". The deployment must be responsible, innovation must be customer-focused, and the results must be trusted and useful—not merely impressive—to align with the core mission of simplifying travel and accelerating the ecological transition.

> *"And we said we dare to experiment because innovation is part of our DNA but we deploy with care because we have a lot of responsibility in front of our customers of our numerous customers."*



Next-Gen Airports: AI at the Heart of the Passenger Journey.

Rémi Maumon de Longevialle, CEO

About Rémi Maumon de Longevialle: CEO of VINCI Airports, leading the company's global development after key roles in structured finance, airport development, and financial leadership across the VINCI Group.

About VINCI Airports: World-leading private airport operator within VINCI Concessions, developing and managing airports worldwide with a focus on operational excellence, modernization, and environmental transition.

How is data, as a raw material, positioned at the core of Vinci Airports' strategy?

Rémi Maumon de Longevialle: The COVID-19 pandemic served as a critical "wake-up call," accelerating the realization that the company was not mature enough in data utilization. This led to a five-year effort to build a sophisticated data platform across the entire network of airports, placing data at the heart of the strategy, led by a director who also oversees operations.

Beyond traditional AI, what are the use cases you are deploying with Generative AI?

Rémi Maumon de Longevialle: Two primary applications are being tested and deployed:

Passenger-Facing Agentic AI: Deployed in Lyon, this tool lets passengers use totems or smartphones to get personalized information (like gate details or accessibility services), with nearly 50,000 of 400,000 monthly travelers using it and reporting strong satisfaction.

Internal "Talk to My Data" Tool: This Generative AI solution helps analysts and office teams query large operational, commercial, and financial datasets through a semantic layer, achieving an estimated 75% adoption rate among eligible employees.

Can you explain how AI is currently impacting the group in terms of operations, employees, and customers?

Rémi Maumon de Longevialle: AI is leveraged across the passenger journey through three key areas:

Security Screening: New equipment in UK airports (e.g., Gatwick) and Osaka uses computer vision techniques to analyze 3D images of carry-on bags, reducing queuing time and the necessity for secondary checks by identifying security issues more efficiently.

Aircraft Turnaround: A "smart turnaround" tool, deployed in Portugal, Lyon, and Gatwick, uses computer vision to monitor, in real-time, all stakeholders involved around the aircraft. This overcomes historic lack of collaboration between ground crews, allowing the early detection of the root cause of potential delays.

Passenger Flow Forecasting: Machine learning tools have dramatically improved the accuracy and frequency of passenger forecasting, allowing predictions per flight and even estimating the time passengers will arrive at the airport (e.g., 90 minutes vs. 2 hours prior). This granular detail is crucial for optimizing resource allocation, such as determining the number of security lanes to open.

Can you share key learnings or "war stories" about the 'how' of this transformation—what was difficult, easy, or surprising?

Rémi Maumon de Longevialle: The toughest phase was the first 2–3 years unifying data across 70+ airports, each with 20–30 systems—a period critical for today's data quality and rapid deployment, though with little visible innovation. VINCI Airports' network, from regional airports to major hubs like Gatwick, allows testing new technologies in mid-size airports like Belgrade or Budapest before scaling to larger sites.

> *"It took us five years to reach a situation today where data is really at the heart of our strategy with a huge data platform for the entire set of airports that we operate."*

From Inspiration to Action:
Let’s transform travel together with Agentic AI.

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Sylvain Roy,
Chief Technology Officer

amadeus

About Sylvain Roy: Sylvain Roy serves as the Chief Technology Officer at Amadeus, having joined the company in 2003. He oversees the global technology strategy, cloud transformation, and engineering for the group's diverse business lines.

About Amadeus: Amadeus IT Group is a major Spanish multinational technology company headquartered in Madrid. With over 18,000 employees and revenue exceeding €6.1 billion (2024), it provides the critical transaction processing power and software solutions that drive the global travel and tourism ecosystem.

- **The Transition to Agentic Capability:** While Artificial Intelligence has optimized pricing, revenue management, and shopping inspiration for 15 years, it currently fails at execution during disruptions. A standard LLM can plan a vacation but cannot autonomously rebook a flight during a snowstorm or process a complex miles redemption. The industry’s next frontier is "Agentic AI"—moving from passive inspiration to active, autonomous booking and problem-solving.
- **The Trust Barrier & Security Standards:** The primary hurdle for Agentic AI is not technological but human: trust. Travelers may hesitate to let an AI agent book and pay on their behalf, similar to the initial consumer hesitation with e-commerce credit card payments 30 years ago. To succeed, the industry must rigorously address cybersecurity, ethics, and compliance to make users comfortable with autonomous transactions.
- **Legacy Infrastructure as the Bottleneck:** The majority of implementation challenges (80%) stem from fragmented legacy systems rather than AI limitations. Most travel APIs predate Generative AI (2017) and were designed for human-machine interaction (websites) or rigid system-to-system flows, not for the dynamic needs of AI agents. Providers must upgrade or redesign their foundational architecture to support Agentic AI at scale.
- **The Battle for the Customer Interface: A**s AI agents become personalized digital assistants (integrated with calendars, contacts, and location), they risk disintermediating travel sellers (agencies, airlines, hotels). If a third-party AI controls the interface and data, travel brands lose the ability to personalize and compete. The industry must find ways to access traveler data without becoming dependent on external AI ecosystems.
- **Strategic Collaboration for Survival:** The travel value chain is evolving, and individual players cannot adapt in isolation. To retain the customer relationship and influence how future digital assistants interact with the industry, travel providers must collaborate to define open standards, orchestrate data sharing, and create a unified, secure end-to-end experience.

> *"Frankly, 80% of the challenges that we are facing are not coming from the limitation of AI. They are coming from legacy fragmented system and the underlying technology below it."*

From Hype to Impact: How Club Med are unlocking the benefits of AI. (1)

Siddhartha Chatterjee,
Global Chief Data & AI Officer

Corentin Rosado,
Head of AI GTM international

Sidney Zeder,
Director

About Siddhartha Chatterjee: Siddhartha Chatterjee leads the global data and Artificial Intelligence strategy at Club Med, championing the company's shift from a "smart adopter" to an AI pioneer.

About Club Med: A global leader in premium all-inclusive holidays, Club Med is a French travel operator owned by Fosun Tourism Group, generating approximately €1.7 billion in revenue (2023) with operations in 40 countries.

About Corentin Rosado: Corentin Rosado heads the international Go-To-Market strategy for Artificial Intelligence at Asana, focusing on helping enterprises structure their data to deploy AI effectively.

About Asana: A US-based work management platform (NYSE: ASAN) with over $600 million in annual revenue, designed to help teams organize, track, and manage their work.

About Sidney Zeder: Sidney Zeder serves as a Senior Director at Artefact, a global data and AI consulting firm, moderating this discussion on the practicalities of scaling AI in the travel sector.

The AI Transformation Plan at Club Med

- **Siddhartha Chatterjee:** Club Med initiated a strategic pivot in 2023, moving from a "smart adopter" to a "pioneer" posture. Given the brand's human-centric DNA, the strategy prioritized ethics and compliance while adopting a "scale or fail" mentality. This resulted in immediate client-facing deployments, such as an AI agent on WhatsApp that now handles 30-50% of inbound customer requests across 15 markets. Additionally, they deployed "Gentle Writer," a copywriting agent used by hundreds of marketers to ensure consistent brand tone worldwide.

Impact on Internal Efficiency and Operations

- **Siddhartha Chatterjee:** To address internal complexity, Club Med developed "Geo Match," an ML-driven tool solving a two-decade-old logistical challenge: the seasonal reassignment of staff (G.O.s) between resorts. The system processes 40,000 rules to automate 75% of staff placements, freeing HR to focus on career development. Furthermore, 75% of internal IT support tickets are now resolved by AI agents within Jira, significantly reducing downtime.

> *"AI foremost is a leadership posture. So we changed our mindset from being a smart adopter to a pioneer."*

From Hype to Impact: How Club Med are unlocking the benefits of AI. (2)

Addressing Organizational Fragmentation

- **Corentin Rosado:** Work in large enterprises is often fragmented across spreadsheets and emails, leading to duplication and slow decision-making. Asana addresses this via its "Work Graph" data model, which links high-level strategic goals to daily execution tasks. By structuring this data foundation, AI can be deployed to provide visibility and streamline workflows, helping clients like Qatar Airways and American Airlines standardize processes and reduce administrative overhead by up to 50%.

Key Approaches to Scaling AI Production

- **Siddhartha Chatterjee:** To escape the industry norm where only 5% of AI projects reach production, Club Med adopted a "Multi-Agent Architecture." Instead of a single model, they utilize four distinct agents (Understanding, Search/RAG, Formulation, and Accuracy Checking) to reduce hallucinations to near zero. This approach achieved an 85% production success rate. To sustain this, they created a new role, the "Process Designer"—employees trained to map and redesign their own workflows for AI automation—supported by 100 internal AI.

"You cannot just defer on AI and pretend that it was not your responsibility... AI is more there to supercharge the human judgments rather than actually replacing it."

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"With only 5% of AI projects going to production, scaling is where most companies struggle."

The Recipe for Successful AI Adoption

- **Corentin Rosado:** Success relies on three pillars: Context, Transparency, and Contro. AI must act as a teammate with access to the full work context to be effective, rather than a siloed tool. Crucially, the "human in the loop" remains essential; the system must be transparent about its logic and controllable by users to ensure accountability and ethical judgment.

Concrete Business Outcomes

- **Siddhartha Chatterjee:** Beyond task automation, Club Med reports a 5x to 10x gain in time efficiency across successful use cases. Specifically within software engineering, their 300 developers are seeing a 25–30% increase in productivity and code quality. The strategic goal is not merely cost-cutting but reallocating this saved time to innovation and building more robust, feature-rich systems for customers.

The Future of Travel: Humans, Robots & the Quest for Balance. (1)

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Stéphanie Charlaix Meyer,
SVP Customer Service

Dane Molter,
SVP, Navan Group Travel Marketplace

Simon Wieschemann,
Executive Vice President, Global Accounts

Florent Bernard,
Managing Partner & Global Lead Travel & Tourism

About Stéphanie Charlaix Meyer: Stéphanie oversees Customer Service at Air France-KLM, managing 5,000 agents worldwide who handle approximately 20 million interactions annually across 30 languages.

About Air France-KLM: A leading global airline group headquartered in Paris, Air France-KLM generated ~€30 billion in revenue (2023) with over 77,000 employees, connecting Europe to the rest of the world.

About Dane Molter: Dane leads product and technology strategy for the marketplace at Navan, focusing on simplifying travel booking and expense management for frequent travelers.

About Navan: Formerly TripActions, Navan is a US-based corporate travel and expense management company valued at ~$9.2 billion (2022), with over 3,000 employees dedicated to modernizing business travel.

About Simon Wieschemann: Simon serves as Executive Vice President at Teleperformance, steering global travel verticals and major accounts.

About Teleperformance: A global leader in digital business services, Teleperformance (TP) employs ~500,000 people and generates ~€10 billion in revenue, providing customer experience management across the globe.

The Impact of AI on Customer Behavior & Operations

- **Stéphanie Charlaix Meyer:** Post-COVID, customer behavior shifted dramatically. Self-service adoption jumped from 60% to 85%, meaning the remaining 15% of human interactions are now significantly more complex and emotionally charged (requiring "reassurance"). This higher complexity demands AI support to assist agents, rather than replace them, ensuring they have relevant information instantly.

- **Dane Molter:** Navan integrates AI end-to-end, resolving over 50% of inbound support tickets fully autonomously. However, because travel is a "deeply personal experience" (even business travel), the human agent remains a premium product feature. AI handles the mundane to allow humans to focus on complex, emotional problem-solving.

- **Simon Wieschemann:** The industry is maturing toward a "hybrid set" where AI does not replace humans but empowers them. Teleperformance sees a trend toward "Intake Agents"—AI that assesses customer intent and sentiment upfront to decide whether to route to a digital co-pilot or seamless hand-off to a human for an empathy-led dialogue.

The Future of Travel: Humans, Robots & the Quest for Balance. (2)

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The Role of Co-Pilots in Managing Complexity

- **Dane Molter:** In a fragmented travel ecosystem (NDC, GDS, direct bookings), complexity is exploding. Co-pilots are essential for shielding agents from this technical complexity, guiding them through workflows without requiring knowledge of legacy command lines]. This allows agents to focus on soft skills and sentiment rather than technical execution.

- **Simon Wieschemann:** Co-pilots are evolving from simple summarization tools to proactive sales enablers. By 2030, they will likely facilitate real-time upselling and offer creation by analyzing customer intent during live conversations.

- **Stéphanie Charlaix Meyer:** Air France-KLM uses co-pilots for two main efficiencies: Summarization (automating the post-call log to save time and ensure continuity) and Knowledge Retrieval (instantly pulling answers from 28,000 articles across 30 languages to solve complex pricing or baggage queries).

> *"We are envisioning a world where everybody is going to basically have their personal Executive Assistant... it isn't limited just to your executive team."*

Vision for 2030: Personalization & The Human Touch

- **Dane Molter:** The future is the "democratization of the Executive Assistant." By 2030, every employee—not just the C-Suite—will have a personal AI travel planner that manages every moving piece of their trip proactively.
- **Stéphanie Charlaix Meyer:** The focus will shift from reactive to proactive service. AI will enable brands to anticipate disruptions and contact the customer before they even realize there is an issue, turning potential friction into loyalty-building moments.
- **Simon Wieschemann:** While AI will handle the transaction, the "Trust" factor will remain the exclusively human domain. The physical experience of travel cannot be digitized, and human trust will be the premium currency

> *"Self-service is the first contact... helping the customer is not just answering the question, it's reassuring them. That human touch is non-negotiable."*

> *"It's really about not replacing humans by AI... it has to be about delivering the right connect of AI to make humans meaningful."*

How Travel Brands Exist in the Age of Generative AI. (1)

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Gilles Karlé,
Chief Operating Officer

Matthias Keller,
CPO

Piero Sierra,
Chief AI Officer

Johannes Thomas,
Managing Director & CEO

Sidney Zeder,
Director

About Johannes Thomas: Johannes Thomas is the Managing Director and CEO of Trivago, a global hotel search platform focused on reshaping the way travelers compare prices and find ideal accommodations. **About Trivago:** A leading global hotel metasearch engine based in Germany.

About Gilles Karlé: Gilles Karlé serves as the Chief Operating Officer at Kiwi.com, an online travel agency known for its "virtual interlining" technology that combines flights from non-cooperating carriers. **About Kiwi.com:** A travel company specializing in connecting disparate flight segments to offer cheaper travel options.

About Piero Sierra: Piero Sierra is the Chief AI Officer at Skyscanner, responsible for integrating artificial intelligence into the company's product suite to enhance travel discovery. **About Skyscanner:** A leading global travel search site based in Scotland.

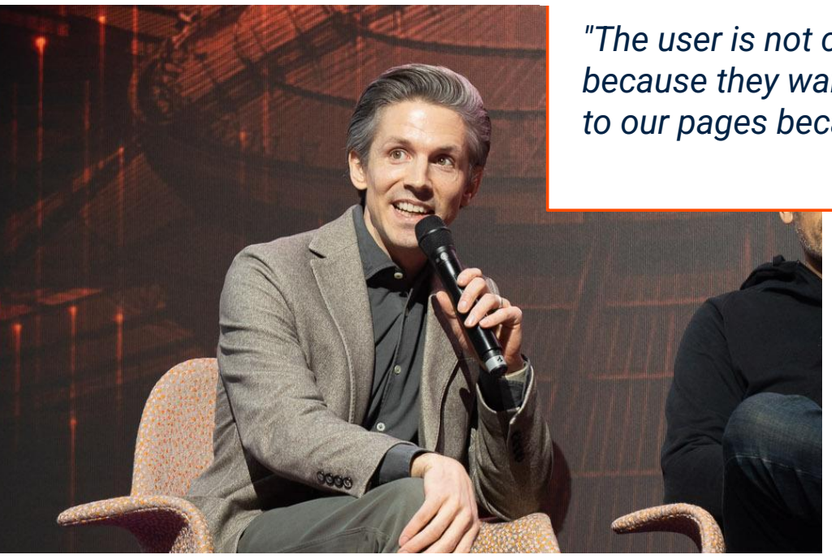
About Matthias Keller: Matthias Keller is the Chief Product Officer at KAYAK, overseeing the product strategy and development of the company’s portfolio of travel search brands. **About KAYAK:** A US-based travel metasearch engine operated by Booking Holdings, processing billions of queries annually across its brands to help travelers find flights, hotels, and cars.

Impact of Generative AI on Travel Discovery

- **Johannes Thomas:** Generative AI is creating a new discovery layer, but users visit platforms like Trivago primarily to book a trip, not to test AI. While AI allows smaller teams (10 people) to achieve what used to take hundreds, established brands with optimized products and high conversion rates remain crucial. The main challenge is not just adopting AI, but maintaining the brand trust built over decades of SEO dominance.
- **Gilles Karlé:** Kiwi.com tried replacing traditional search with natural language interfaces, and conversion rates dropped by 70-80%**.** Customers are creatures of habit and prefer structured choices over conversational ambiguity for complex purchases like flights. However, AI is invaluable for backend speed—allowing Kiwi to run hundreds of experiments weekly and iterate products 10-15x faster than before.
- **Piero Sierra:** The world is moving from "search" to "answers". While chatbots are great for top-of-funnel queries (e.g., "Can I bring my pet?"), they struggle with the deep comparison phase. Skyscanner sees AI as an additive channel rather than a replacement; users may start with a chatbot but eventually need the structured data and trust of a metasearch engine to finalize a booking.
- **Matthias Keller:** Discovery is becoming commoditized. Users might start their journey on ChatGPT, but they need a platform like KAYAK to validate that they are getting the best price and to understand the "messy" details (baggage fees, seat selection) that AI summaries often miss. The opportunity lies in capturing users who have done their AI research but need a trusted shelf to transact**.**

How Travel Brands Exist in the Age of Generative AI. (2)

Adopt AI
GRAND PALAIS



> *"The user is not coming to our pages because they want to try out AI... they come to our pages because they want to travel."*

AI's Role in Customer Service vs. Booking

- **Johannes Thomas:** Chatbot experiences are currently not superior for the core booking flow. Users want to see the "shelf" of options, not have an AI pick one for them from a backroom. The visual comparison and transparency of a traditional list view remain the preferred user interface for high-stakes purchases
  .
- **Piero Sierra:** AI will enrich traditional search rather than replace it. For example, summarizing thousands of reviews into a concise paragraph is a perfect use case for AI within a standard interface [27:40]. The goal is to power the experience with AI data without forcing a conversational UI where it doesn't fit.

- **Matthias Keller:** AI is being used to clean up the backend messiness of travel data—deduplicating listings, normalizing amenities, and creating "hacker fares" (combining two one-way tickets). This invisible AI work is what creates the unique value proposition of a metasearch engine, ensuring the user sees a coherent and competitive offer.

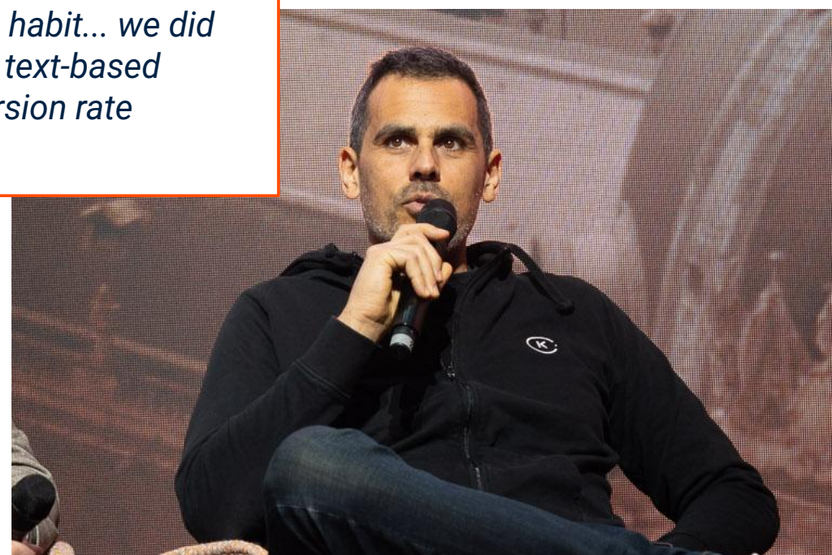
Strategic Focus for Travel Brands

- **Johannes Thomas:** Brands must distinguish "signal from noise". The majority of AI hype is a distraction. Success comes from focusing on the 5-10% of AI applications that truly drive conversion and user value, rather than chasing every new trend.

- **Gilles Karlé:** Speed and relevance are paramount. The advantage of AI lies in closing the feedback loop with customers faster. Instead of lengthy market research, Kiwi now ships products to production to get real-time feedback, accepting that 80% may fail but the learning cycle is accelerated.

- **Matthias Keller:** The focus should be on meeting the customer where they are. If that means integrating with an LLM plugin or a new AI device, brands must be ready to serve their data there, treating it as just another distribution channel like mobile apps or browsers

> *""Our biggest competitor is habit... we did hundreds of iterations of a text-based search engine... our conversion rate dropped 70-80%."*



How Travel Brands Exist in the Age of Generative AI. (3)

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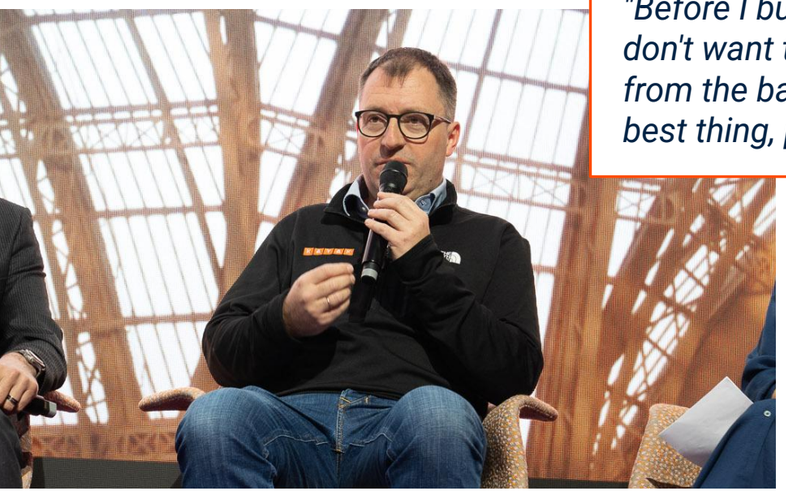
The Trust Gap & The "Black Box" Problem

- **Piero Sierra:** Trust remains the major barrier to AI adoption in travel. Skyscanner's data indicates that 49% of travelers worldwide are worried about using AI for travel planning (rising to ~30% active distrust in markets like France). If an AI provides an answer without clear sourcing, users hesitate. The industry must bridge the gap between "generative answers" and "verified data" to overcome this sentiment.
- **Matthias Keller:** This distrust drives the need for the "shelf" view. Users suspect that an AI selecting a single option might be hiding better alternatives or optimizing for the platform's benefit rather than the user's. The visual "wall of results" serves as a mechanism of transparency and reassurance that the user isn't missing out (FOMO).

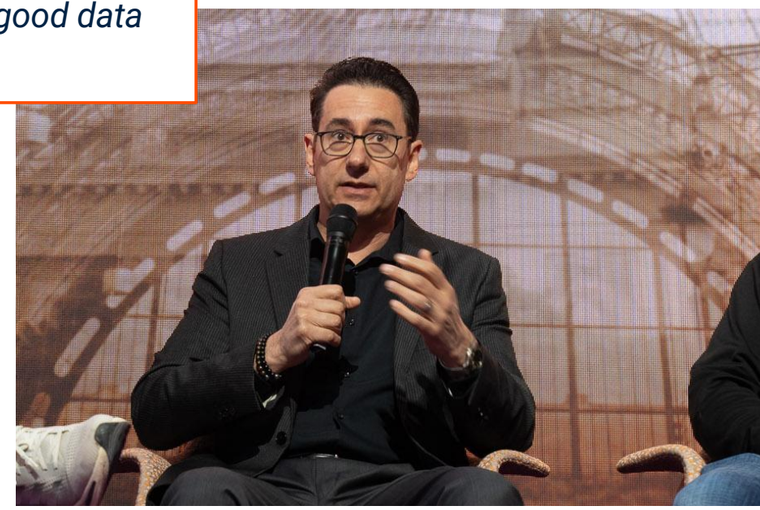
Creating Net-New Inventory (Virtual Interlining)

- **Johannes Thomas:** Beyond the user interface, the most immediate impact of AI is internal operational efficiency. Trivago has downsized from 1,500 employees pre-pandemic to 600 today, yet the output remains comparable or higher. AI allows a team of 10 developers to execute work that previously required 100, fundamentally changing the unit economics of running a tech platform.
- **Gilles Karlé:** The speed of iteration has arguably become the primary competitive advantage. Kiwi.com is now running hundreds of experiments weekly. The goal isn't just automation but closing the "learning loop" with customers instantly. By shipping products to production faster (even if many fail), they reach product maturity in months rather than years

> *"Before I buy, I want to see the shelf. I don't want to have someone just come from the backroom and say... this is the best thing, please click book."*



> *"The world is moving from search to answers... but answers without good data are really, really hard to provide."*



The "Efficiency Dividend" of GenAI

- **Matthias Keller:** Metasearch engines are using AI to move beyond simple aggregation into content creation. KAYAK uses AI to construct "Hacker Fares"—combining two one-way tickets from different airlines to create a round trip that doesn't exist as a single SKU in airline inventory systems. This ability to synthesize new, cheaper product options via AI processing is a unique value proposition that generic LLMs cannot easily replicate without deep integration into flight logic.

Brand Resilience in a Commoditized AI World

- **Johannes Thomas:** As AI models like ChatGPT potentially commoditize the discovery layer, brand equity becomes the ultimate moat. Travel is a high-anxiety, high-cost purchase. Even if a user discovers a trip via a generic chatbot, they will likely migrate to a known, trusted brand (like Trivago or Booking) to execute the transaction because they need the assurance of customer service and financial security that a "wrapper" or generic model cannot provide.

AI For Travel Grand Palais Opening Words - Day 2.

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Florent Bernard,
Managing Partner & Global Lead Travel & Tourism

ARTEFACT

About Floren Bernard: Floren Bernard is a Managing Partner at Artefact, where he leads the global Travel, Tourism, and Transportation practice. He specializes in leveraging data and AI to transform industry operations, focusing on predictive maintenance and hyper-personalized customer experiences.

About Artefact: Artefact is a global data and AI consulting services company headquartered in Paris, France, with approximately 1,700 employees worldwide. The firm bridges the gap between strategy and engineering to help organizations transform data into tangible business value and accelerate AI adoption.

- **The travel industry is transitioning from viewing AI as a peripheral experimental tool to an essential reality across hospitality, rail, and aviation infrastructures.** The core challenge is no longer achieving "small increments" in value, but rather reinventing fundamental business processes to meet the demands of a new era of ultra-personalization and operational efficiency.
- **AI is fundamentally altering the entire traveler journey, moving beyond the booking phase to influence inspiration, planning, and anticipation.** Guests are no longer seeking generic seats or rooms; they demand tailor-made, ultra-personalized experiences, necessitating a robust alignment of both technological and human resources to fulfill these specific expectations.
- **The transformation extends deep into operational logic,** combining traditional AI for forecasting and planning (e.g., airport logistics) with Generative AI to optimize maintenance, housekeeping, and day-to-day infrastructure management. This dual approach allows operators to move from reactive management to predictive excellence.
- **A critical strategic pillar is the impact on collaborators.** AI is being deployed to eliminate "shallow work," refocusing human talent on "hardcore deep thinking" and high-value tasks. This shift is essential for companies aiming to reinvent their core identity and business processes through AI integration.
- **AI is not a standalone "topic" but the primary driver for corporate transformation in the coming years.** The industry must look to peer use cases—across OTAs, rail, and hospitality—to understand how to scale these technologies from pilot projects to core business drivers.

> *"The travelers are not looking for a seat in a plane or a room in a hotel anymore. What they want is tailor made experiences that are fully custom, fully adapted to their needs."*

The Traveller in 360°: Data Sharing & Ultrapersonalization. (1)

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David Krieff,
CIO

GROUPE ADP

Nicolas Paepegaey,
Chief Transformation Officer

Louvre Hotels GROUP

Leif Vase Larsen,
CEO International

DERTOUR GROUP

Florent Bernard,
Managing Partner & Global Lead Travel & Tourism

ARTEFACT

About David Krief: Chief Information Officer at Groupe ADP with expertise in international airport operations and hospitality infrastructure.
About Groupe ADP: Operates major airports in Paris, Turkey, and India; manages 100M+ annual passengers with roughly €5B+ revenue and 24,000 employees (HQ: Paris).

About Nicolas Paepegaey: Chief Transformation Officer overseeing the tech dimension of a global hospitality chain spanning 70 countries.
About Louvre Hotels Group: Part of Jin Jiang International (2nd largest hotel group globally), managing 1,700 hotels with brands from budget to luxury (HQ: Nanterre).

About Leif Vase Larsen: CEO International at DERTOUR, specializing in high-volume tour operations and DMC chains.
About DERTOUR Group: Europe's second-largest tour operator, moving 10 million passengers annually with its own hotel chains and DMCs (HQ: Cologne).

In the age of AI (2025), what does ultra-personalization mean for your company?

- **David Krief: F**or ADP, it marks a shift from "client hypercentricity" to a total process redesign. While we currently use GenAI to rewrite individual customer emails, the imminent leap is defining the physical airport journey on the fly based on specific passenger preferences. We are moving toward "agentic" orchestration, where AI agents manage services across different providers from the client's perspective.

- **Leif Vase Larsen:** It is the transition from generalized communication to individualized customer web pages and app interfaces that adapt to specific user characteristics. AI helps us optimize the experience throughout the entire funnel: before booking, during the holiday, and post-travel follow-ups.

- **Nicolas Paepegaey:** Historically, personalization was restricted to loyalty card holders. AI is a "game-changer" because agentic technology allows us to capture deep personalization data from non-loyal or infrequent customers. Customers will arrive at hotels via their personal AI agents, sharing high-fidelity data while retaining control, forcing us to master agent-to-agent interaction.

The Traveller in 360°: Data Sharing & Ultrapersonalization. (2)

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How are you managing the "raw material" of personalization—data collection and sharing?

- **Nicolas Paepegaey:** Hospitality is complex due to third-party distributors (OTAs) owning the customer relationship. We are leveraging AI to make this fragmented data real-time and usable for business departments, not just for the customer interface, but to optimize internal operations so staff can spend more time on guest interaction.

- **David Krief: At** ADP, we often don't know a passenger's name, so we use AI to infer preferences based on behavior. However, the true breakthrough is "Data Sharing without Sharing." By collaborating with airlines (like Air France) through joint AI tools, we can process strategic passenger data to solve complex issues like lost luggage or missed connections without exposing raw private data to each other.

- **Leif Vase Larsen:** We view data links as essential for predicting customer behavior across the entire value chain (DMCs, hotels, airports). We use LLMs for automated image labeling, translation, and converting supplier text into a unified brand language across all international partners.

> *"The next step would be to define the airport process on the fly based on the characteristics and preferences of a passenger."*

> *"I could easily see a future where a lot of AI agents talk together... it will often be AI agents talking to AI agents in the future."*

What are the concrete AI use cases currently driving value in your operations?

- **Nicolas Paepegaey:** Beyond dynamic pricing, which has reached new levels of accuracy, we are exploring "one-to-one negotiation" where AI agents negotiate private rates directly with our system, potentially bypassing public OTAs. Internally, we've launched an AI "companion" for General Managers to automate compliance and administrative tasks, allowing them to focus on hospitality.
- **David Krief:** We use AI for predictive staffing to ensure service quality without bloating costs. A key partnership with Air France ("France Connect") uses data sharing to identify passengers at risk of missing connecting flights; the airport then identifies these individuals in real-time and moves them through "fast lanes" to redesign the hub experience around the individual.

> *"Any brand interacting with a customer will be expected to be able to interact with this agent."*

Collaboration : a strategic advantage for European travel tech.

Jonathan Huffstutler, Marketing Director

Dolores Ordoñez, Director at AnySolution (coordinator of DEPLOYTOUR)

About Dolores Ordoñez: Director at AnySolution and coordinator of the European "DeployTour" project, specialized in digital transformation for tourism.
About AnySolution: An SME based in Mallorca focused on R&D, innovation, and strategic consulting for smart cities and sustainable tourism (HQ: Spain).

About Jonathan Huffstutler: Marketing Director at EONA-X (referenced as Aonix in transcript), lead expert in building decentralized data infrastructures for mobility and tourism.
About EONA-X: A French non-profit coordinating the creation of a European data space for mobility, transport, and tourism to ensure data sovereignty.

> *"Data spaces were born to generate a new added value and also to generate new business models; it's not just for public administration."*

How is tourism data collaboration being structured at the European level?

- **Dolores Ordoñez:** The European Union is funding "Data Spaces" to move beyond the struggle of individual data silos. Currently, 13 member states and 43 entities across the entire tourism value chain are collaborating under the "DeployTour" initiative. This is a strategic shift to fund infrastructure that allows different actors to work together without losing control of their proprietary information.

- **Jonathan Huffstutler: T**his initiative, DeployTour, is a three-year project designed to showcase how AI and data technologies support the industry across diverse locations through specific pilots.

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What are the specific use cases and pilots currently being developed?

- **Dolores Ordoñez:** We have five pilots targeting different tourism typologies: 1) Mature destinations (Canaries, Andalusia, Balearics) to balance 19M annual tourists with resident needs; 2) Cultural heritage in Greece; 3) Cross-border mobility between Slovenia and Italy; 4) Empowerment in Lapland; and 5) MICE tourism (Meetings, Incentives, Congress, Events).

- **Jonathan Huffstutler:** The Paris region pilot specifically focuses on MICE tourism. We are analyzing the "bleisure" (business + leisure) trend, tracking how business travelers impact the destination economically and environmentally, and determining if they return with their families.

What is the technical and strategic difference between a "Data Space" and a "Data Lake"?

- **Dolores Ordoñez:** In a Data Lake, owners must surrender their data to a central repository, losing control over its use. In a Data Space, the architecture is decentralized. Data owners only share descriptions of their datasets in a catalog. They retain digital sovereignty and ownership, using agreements and regulations to control who uses the data and for what purpose. This is vital for the 95% of the tourism ecosystem that are SMEs.

> *"Data is not necessarily what people want to discuss... but it's really the foundations of a trustworthy AI."*

Closing words: France Tourism Tech.

MINISTÈRE DE L'ÉCONOMIE ET DES FINANCES
Liberté Égalité Fraternité

Adopt AI GRAND PALAIS

Christophe Strobel, Director of the Tourism

About Christophe Strobel: Director of the Tourism Department at the Ministry of Economy, Finance and Industrial and Digital Sovereignty, overseeing national tourism policy and innovation.
About Direction Générale des Entreprises (DGE): A central French administration under the Ministry of Economy; manages approximately 1,300 employees and drives the competitiveness of French industry, services, and tourism.

Could you recall the genesis and the core objectives of the France Tourism Tech initiative?

Christophe Strobel: The initiative was born three years ago from a diagnostic of the French Traveltech landscape which identified three critical gaps. First, a valuation deficit: French startups were raising only 1/3 of the average funding of other French tech sectors. Second, a European lag: a 50% funding gap compared to Germany and the UK, resulting in only one unicorn (BlaBlaCar) vs four in Germany. Third, a technological gap: a prevalence of platform-based solutions while the US was already pivoting toward AI-driven tourism. The program was designed to solve these imbalances.

How has the ecosystem of partners evolved and what is its current composition?

Christophe Strobel: The program has grown significantly, showing a 75% increase in partners between the second and third cohorts, now totaling 70. The ecosystem is diverse, including public operators (Business France, BPI France, Atout France), major professional federations (CAT, FNHPA), and corporate giants like Accor, Louvre Hotels, and Amadeus. Crucially, it now integrates investment funds and CVCs (BNP Paribas, Isai, Daphni) to bridge the funding gap and facilitate public-private innovation diffusion.

What concrete results have been achieved through this collaborative model?

Christophe Strobel: The strength of the program lies in open innovation. To date, 80 strategic introductions have been made, with 50% resulting in Proof of Concepts (POCs). We utilize "Learning Expeditions"—such as the one with SNCF Connect & Tech—where startups present flexible, agile solutions directly to procurement and innovation heads. Success stories include Naboo, which set a sector record with a €20M raise, and Murmuration, a first-promotion startup using deep learning to evaluate environmental impacts for partners like Vinci.

Beyond acceleration, how does the program impact the broader transformation of the tourism sector?

Christophe Strobel: While the state has deployed massive resources through "Plan Destination France," the program tackles the "last mile" of innovation—actually getting solutions into the hands of professionals. This is vital for the ecological transition (e.g., reducing water usage) and digitalizing the offer. By federating investors and big groups, we build collective resilience against international geopolitical and economic shocks through a "do together" strategy.

What are the strategic priorities for the upcoming roadmap?

Christophe Strobel: The next frontier is data. We are working on two pillars: first, enhancing the frequency and granularity of tourism attendance data at an infra-departmental level. Second, creating new models by opening public data, such as that from the Agence Nationale des Chèques-Vacances (ANCV) regarding social tourism. Furthermore, we are prioritizing "Inclusive Tech" following our recent hackathon on accessibility to solve navigation and booking challenges for travelers with disabilities.

> *"The great value-add of the program is its network of 70 partners that enables open innovation and the creation of new use cases through POCs between startups and major groups."*

AI FOR TRAVEL

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Adopt AI

MASTERCLASS & STARTUP STAGES

25 - 26 November, 2025.

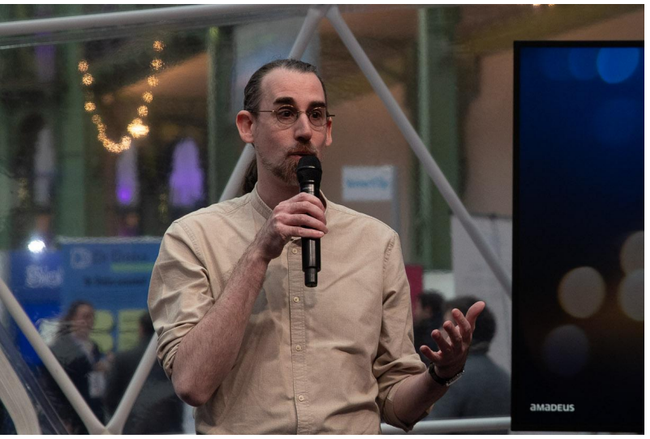
Beyond the AI hype : How Amadeus transforms traveler experience at scale.

Yannick Devaux, Innovation Director amadeus

Olivier Kuffler, AI Program Director amadeus

About Yannick Devaux: As Innovation Director at Amadeus, he leads the strategic deployment of emerging technologies, focusing on moving solutions from ideation to industrial scale.
About Olivier Kuffler: He oversees the AI Program at Amadeus, specializing in the practical implementation of AI agents and bridging the operational gap between R&D and production.

About Amadeus: A leading global travel technology company headquartered in Madrid, Spain, with ~18,000 employees and ~€5.4 billion in revenue (2023).



> *"We don't develop crystal balls... What we do, we try to work on how we do things and why we do things... making sure that we can ground what we do with our principles."*

- **Context & Challenge:** While media buzz surrounds AI, transforming the traveler experience requires moving beyond demos to answering real problems at scale. Amadeus categorizes its AI strategy into three pillars: **Optimization** (improving existing products), **Opportunities** (solving previously unsolvable problems), and **Question Marks** (future uncertainties). The central challenge is transitioning from "easy" Proofs of Concept (POCs) to robust production systems that handle global complexity.

- **Optimization at Scale:** Amadeus has utilized AI for over 15 years, particularly in Machine Learning (ML) for forecasting and flight search. Processing **3 billion transactions daily**, their algorithms optimize complex routing to find the cheapest and fastest solutions. This legacy implementation provides a mature platform for engineers to now integrate Generative AI into customer-facing tools, making interactions more natural and commercial.

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- **Case Study: Voice-to-Voice Agent:** To illustrate the "Opportunities" pillar, the speakers detailed the deployment of a Generative AI voice agent for airline call centers. Moving from a summer POC to a production target in just three months revealed significant hurdles. The team utilized Microsoft's voice-to-voice technology (which was itself not yet fully production-ready), forcing Amadeus to act as a co-developer of the underlying capabilities.

- **Operational & Technical Friction:** The transition to production exposed four critical operational gaps:
  Skills Gap: 80% of the R&D team had no prior AI experience, requiring deep collaboration with innovation experts.
  Legacy Integration: Connecting modern GenAI to archaic telephone systems required solving non-AI technical debt first.
  UX Adaptation: Visual APIs do not translate to audio; reading a list of 20 flights is a poor user experience, requiring the AI to filter and summarize availability intelligently.
  Testing Vacuum: With no market tools available to test voice-to-voice agents, Amadeus had to code their own "LLM as a Judge" to qualify the solution quality.

- **Strategic Conclusion:** The deployment faced unexpected compliance hurdles, as voice is considered biometric personal identity data, requiring voice distortion protocols for privacy. Ultimately, Amadeus argues that while the future of autonomous agents is a "Question Mark," success lies in grounding innovation in ethical principles—ensuring AI is trustable, beneficial, and compliant, rather than just technically feasible.

> *"It appears to be quite easy not to say very easy to have a proof of concept working in few days... [but] before seeing that on production there is a lot of challenges... and we should not underestimate that challenges."*

Travel Beautifully. Plan Intelligently.

Hannah SON,
Founder

About Hannah Son: Founder of TiP (Travel in Your Pocket), a South Korean entrepreneur leveraging 10 years of hospitality experience and 30 years of development expertise to disrupt the luxury travel sector.

About TiP (Travel in Your Pocket): A Seoul-based AI travel concierge startup and K-Startup Center Paris participant. The company offers an all-in-one platform integrating AI itinerary planning, document management, and blockchain payments, specifically targeting the $1.5 trillion global luxury travel market

- **Context & Challenge:** The luxury travel industry lacks a dominant, centralized brand comparable to mass-market platforms like Booking.com.. High-net-worth travelers currently rely on fragmented sources—such as unverified blogs and generic Google searches—which fail to deliver the trust and personalization required for high-end experiences.

- **Core Analysis: AI & Personalization:** TiP addresses this gap by deploying a "next-generation travel infrastructure" driven by proprietary AI. Unlike standard platforms focused on price competition, TiP's AI analyzes client experience data to generate hyper-personalized itineraries and manage all travel documents in a single interface.

- **Financial Innovation:** Recognizing the evolving asset classes of wealthy clientele, the platform is integrating cryptocurrency payment capabilities. TiP is actively establishing partnerships with crypto payment firms (e.g., in Hong Kong) to facilitate seamless digital asset transactions for travel services.

- **Strategic Ecosystem:** The company has secured high-profile corporate partnerships with Samsung, Hyundai, and Mastercard, as well as luxury hospitality leaders like Aman, LVMH Hotels, and Four Seasons. These alliances allow TiP to offer exclusive perks and a commission-based business model, supplemented by a premium membership program.

- **Conclusion:** With the luxury travel market valued at $1.5 trillion and growing faster than mass tourism, TiP aims to become the definitive market leader within five years. The strategy hinges on merging advanced technology with a "human touch" loyalty program to capture discerning clients who demand precision over volume.

> *"I am sure that everyone cannot think about the one luxury travel brand right away... so we will be that brand in five years."*

AI FOR TRAVEL

GRAND PALAIS

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