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ABTA
AFRICAN BUSINESS TRAVEL ASSOCIATION

ANNUAL CORPORATE TRAVEL CONFERENCE 2025

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WELCOME



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A WORD FROM OUR HOSTS

Carol-Ann Van der Merwe

Marketing Manager: Group

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Understanding the updated Carbon Neutral legislation, measuring your footprint & reducing wasteful traveller behaviour

Maureen Masuku

Product Head: eBucks Corporate Travel - FirstRand Bank

Rose Bischoff

Assistant Sales: Tours & Incentives: Support Office – City Lodge Hotels

A woman with dark skin and braided hair, wearing a yellow hoodie, looks directly at the camera with a concerned or disapproving expression. She is holding a large, crumpled yellow plastic bag in her right hand and a yellow plastic basket filled with various yellow items (like a towel, gloves, and a container) in her left arm. The background is a solid, bright yellow color.

Wasteful Traveller Behaviour

About the respondents

- 6 Hotel chains
- 4 Airlines
- 16 Travel Buyers
- 5 TMC's



What we'll look at today

- **Wasteful Traveller Behaviours**
 - Hotels
 - Air Travel
 - Ground Transportation
- **Looking at some numbers**
- **Solutions**
- **Project next steps**

Wasteful Traveller Behaviour: HOTELS

- **Water wastage**

- Excessively long showers
- Running hot water to steam clothes
- Leaving taps on while brushing teeth
- Leaving taps running after check-out
- Requiring fresh towels and linen daily – Often actively ignoring hotel re-use requests
- Excessive toilet flushing

- **Electricity Abuse**

- Keycards replaced by bank cards in order to keep power on in an empty room
- Aircons, lights and TV being left on (for company) in an empty room and on check out
- Running aircon while windows are open, and at maximum high/low temps (instead of 20-22 average)
- Over-riding Aircon timer switches or insisting HK staff don't turn off, even when the room is empty
- Charging devices over-night

- **Food Waste**

- Specifically when dishing up from buffets and ordering room service
- Up to 95% of food waste from buffet (over-dishing)
- Guests dishing breakfast buffet into 'take-away' containers, often not eaten (left in room)
- Guest ordering room service but falling asleep and never eating it



Wasteful Traveller Behaviour: HOTELS

- **Frequent use of single-use plastics / containers**
 - Toiletries, water bottles, take-out containers, shopping bags, take-away coffee cups
- **Theft**
 - Stealing towels, bedding, gowns
 - Stealing globes and batteries
 - Taking slippers, then asking HK for another pair the next day
 - Stealing room décor...
- **Towels & Linen**
 - Changed daily
 - White towels used to polish shoes
- **Laundry**
 - Sending lightly-worn clothes to be laundered
- **Guest Supplies**
 - Daily replacement of soaps
 - Taking unused toiletries home
 - Guests raiding HK trolleys for turn down chocolates, toiletries, toilet paper & towels

Wasteful Traveller Behaviour: HOTELS

- **Staffing resources**
 - Requesting turn-down or room refresh services multiple times a day
- **Mis-use of appliances and facilities**
 - Kettle used to boil eggs, cook noodles, wash undies, warm socks
 - Bath being used as in-room ice bucket, filled with drinks for a party
- **'Just in case'**
 - Sugar sachets, jam, butter taken from buffet 'for later' – often never used
 - Coffee, coffee pods, tea bags taken for later use
- **MICE**
 - Booking oversized meeting spaces or catering for more guests than needed
- **Paperwork**
 - Requesting printed invoices etc and leaving them behind
- **Other**
 - Guest leaving luggage / personal items and then requiring these to be couriered/shipped back to them
 - Regularly discarding partially used items (Snacks, stationery etc)

Wasteful Traveller Behaviour: AIR TRAVEL

- **Food and Water Waste**
 - Passenger selecting a meal, having one bite and leaving the rest, or taking one sip of water and discarding
- **Excessive Cabin Waste**
 - Single-use plastics and containers
 - Passengers leaving plastic wastes on aircraft to be disposed of – Excessive, particularly on long-haul
- **Paper Waste**
 - Printing tickets and boarding passes unnecessarily
- **Waste Segregation**
 - Passengers not putting waste into correct bins at airports
- **Luggage**
 - Overpacking hand luggage and having to check it in at the gate – fuel and resource wastage
 - Packing more than is needed – Increases fuel consumption
 - Purchasing fares with incl. checked baggage for short trips (1–2 nights), and sometimes only packing hand-luggage
- **Choosing carbon-heavy flights**
 - Taking multiple short-haul flights instead of trains where available
 - Choosing indirect flights to save small amount of money, when direct flights are available

Wasteful Traveller Behaviour: GROUND TRANSPORTATION

In transportation

- Using taxis or ride-hailing for short, walkable distances.
- Booking solo cars instead of sharing rides with colleagues.
- Booking a car for a single day trip where Uber will suffice, or car standing un-used for most of the rental period
- Taking cabs or Uber for short walkable distances
- Over-sized rental cars for single travellers
- Using car rental, Uber or taxi when free hotel transfer services exist

Region / Category	Estimated Daily Business Trips	Source / Notes
Global (All regions)	5.2 million per day	Derived from GBTA 2025 forecast of ~US\$1.57 trillion spend ÷ average trip cost (~US\$829). Approx. 1.89 billion trips/year.
South Africa – Domestic overnight business trips	7,700 per day	Stats SA Q1 2025 Domestic Tourism Survey: 8.3 million total overnight trips, 8.3% for business/MICE (~689,000 per quarter).
South Africa – International inbound business visitors	1,100–1,300 per day	Based on ~8–9 million annual international tourist arrivals; ~5% business purpose share.
South Africa – Combined (domestic + inbound + outbound + day trips)	10,000–15,000 per day	Composite estimate including domestic overnight, inbound, outbound, and same-day business trips.

Figures based on available industry and official data sources incl GBTA and Statistics South Africa (Stats SA).

Let's break it down

Electricity

- R20 – R50 cost per day per hotel room
- Est. 69 500 hotel rooms in RSA = **R 1.73 M** per day
- 5% used wastefully = R 86 500 per day = **R 31.5 M** per year

Food Waste

- One medium-sized property - **2 215 Kg** / per year
- 130 hotels from chains in Jhb & CT = **287 950 Kgs** per year

Sources: Statista and Hotelchains.com

Some other numbers to think about...

Plastic Credit Cards

- Currently more than **25 Billion** credit cards in circulation
- Brits have sent over **76 Million** plastic credit cards (**380 tonnes**) to landfill since 2017

Environmental impact

- Credit cards are non-biodegradable
Causes a significant environmental concern, as they break down into microplastics and pollute the environment.
- The use of more sustainable materials is a key part of reducing this impact.

- Sources: *NatWest Group of Banks*, www.wired.com



Motivation to Change

- **Environmental Impact**
- **Ethical & Moral Concerns**
- **Company Culture and Requirements**
- **Cost**

Solutions - Hotels

- Hotel to encourage more conscious behaviour through subtle in-room messaging
- Hotel F&B teams trained to keep food waste to a minimum
- AI Waste management Smart Scales - produce orders - Nigeria
- A nationwide campaign on "Dish What you can Eat!"
- Re-use elements of food left from buffets for other meals
- Send food waste to specialised composting suppliers Eg Bokashi Bins
- Food packaged for later consumption for late-arriving guests

Solutions - Hotels

- Formulate formal food donations initiatives with surrounding community
- Removal of bath plugs to ensure showers only
- Installed shower timers and motion sensor lighting
- Aircon timers or set temperatures
- Toiletry dispensers instead of soap bars and plastic toiletry bottles
- Solar power, grey water filtration and use, composting
- Companies to educate their travellers on these measures to avoid hotel complaints
- Travel with water bottles and coffee flasks from home, to re-fill

Solutions - Air

Promoting Sustainable Practices:

- Airlines can encourage more sustainable dining behaviours among passengers to reduce food waste.

Waste Management Initiatives:

- Seriously consider and implement policies to manage waste more sustainably, rather than just sending it to landfills.

Passenger Awareness:

- Raising passenger awareness about the impact of their waste habits can encourage better personal norms and reduce waste generation.
- Encourage passengers to 'donate' all un-opened items – Start a food revolution!

Wasteful Traveller Behaviours

Project: The Plan Ahead

1. Collect additional information

Continue collecting information from suppliers

2. Baseline Traveller Survey

Assess their awareness around wastefulness, and how intentional they are when they travel

3. Investigate Wasteful Behaviour Psychology

Better understand the drivers that lead to wasteful behaviour

4. Whitepaper & Resources

Compile all information into a Whitepaper, and create simple content outlining what constitutes Wasteful behaviour and how to avoid it.
Let's take this global!

5. Follow up surveys

Hosted in 6-12 months to gauge traveller improvements in awareness

6. Monitoring

On-going supplier, Buyer & Traveller engagement to gauge improvement



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Traveller wellness and productivity Psychological and physiological effects of business travel, and the impact to your company

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MD & Talent Acquisition Specialist – Propel Personnel

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The impact of business travel stress on an employee's presenteeism and health

PROF ANNELI DOUGLAS
Department of Marketing Management

17 October 2025



AACSB
ACCREDITED



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BACKGROUND

New research highlights how distracted employees damage company productivity

- 📊 ABTA conference 2019 – ISOS
- 📊 Momentum presenteeism study
- 📊 11 interviews
- 📊 COVID-19

Momentum has estimated the cost of lost productivity as a result of absenteeism in South Africa to be R70-billion, or 2% of GDP. It also estimates that the cost of lost productivity as a result of “presenteeism” – the hours when you are present at work but not focused on your job as a result of financial or other stress – to be four times as much.



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INTRODUCTION

- ♥ Negative and positive impacts of business travel.
- ♥ Influence of business trips on stress: before, during and after a trip.
- ♥ Consequences of business travel on family conflicts.
- ♥ Travelling affects not only the mind, but also the body.
- ♥ Business travel stress can lead to absenteeism, health problems and other negative consequences.
- ♥ Is there a relationship between business travel stress and presenteeism?



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WHAT IS PRESENTEEISM?

- 🧠 Individuals are physically present at work but mentally absent from work.
- 🧠 While individuals are at work, their cognitive energy is not dedicated to their work.
- 🧠 A result of a negative work environment.
- 🧠 "People turning up to work, who are so distressed by their jobs or some aspect of the organisational climate that they contribute little, if anything, to their work".
- 🧠 An employee going through the motions of work while their focus is elsewhere or an employee not working at all.
- 🧠 More probable to make errors, are less creative, give sub-standard service, and their levels of productivity are lower.



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THE COST OF PRESENTEEISM

- 💰 Productivity loss due to presenteeism can vary from 30% to more than 90%.
- 💰 Presenteeism increases indirect and direct costs and decreases global performance.
- 💰 Cost of presenteeism at R89 billion, for South African companies.
- 💰 Employees loose 12.5% of their working hours due to presenteeism.
- 💰 This translates into an average loss of 35.6 days of productive time per employee, per year.



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BUSINESS TRAVEL STRESS AND PRESENTEEISM

- ✚ Traveling for business purposes could contribute to a negative work environment.
- ✚ Business travel stress could decreasing employee performance.
- ✚ Presenteeism could be a key problem for business travellers, who often face stressful situations before, during and after a business trip.
- ✚ The happy-worker productive-worker belief.



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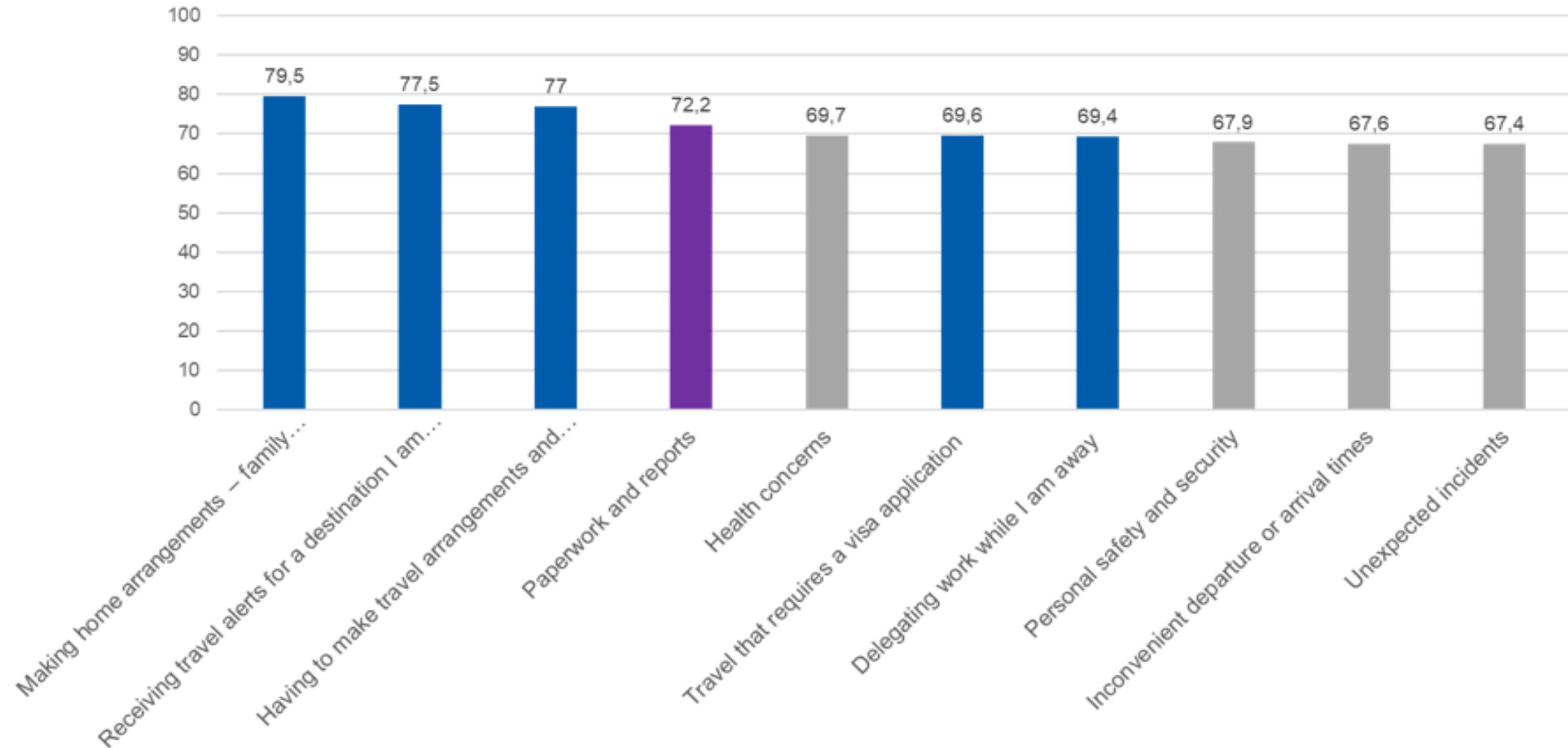
PARTICIPANTS

397 responses were collected from
business travellers

Demographic variables		Percentage
Gender	Male	44.8
	Female	55.2
Age	18-24	14.7
	25-34	47.6
	35-44	21.2
	45-54	11.4
	55 and older	5.1
Relationship status	Married/Living together	53.7
	Single (not married)	40.5
	Divorced/widowed/separated	5.8
Children	Yes	78.7
	No	21.3
Employment level	Top/Senior Management	38.2
	Middle management	38.0
	Lower management/supervisor	12.2
	Associate (non-management)	11.6
Years of employment	Less than a year	8.6
	1-5 years	45.3
	6- 10 years	29.1
	11 - 15 years	9.1
	More than 15 years	7.8
Number of business trips per year	1-2	23.6
	3-5	42.0
	6-10	22.6
	More than 10	11.8

Top 10 travel stressors for South African business travellers

Business travel stressors



Comparison of travel stressors

Business travel stressors

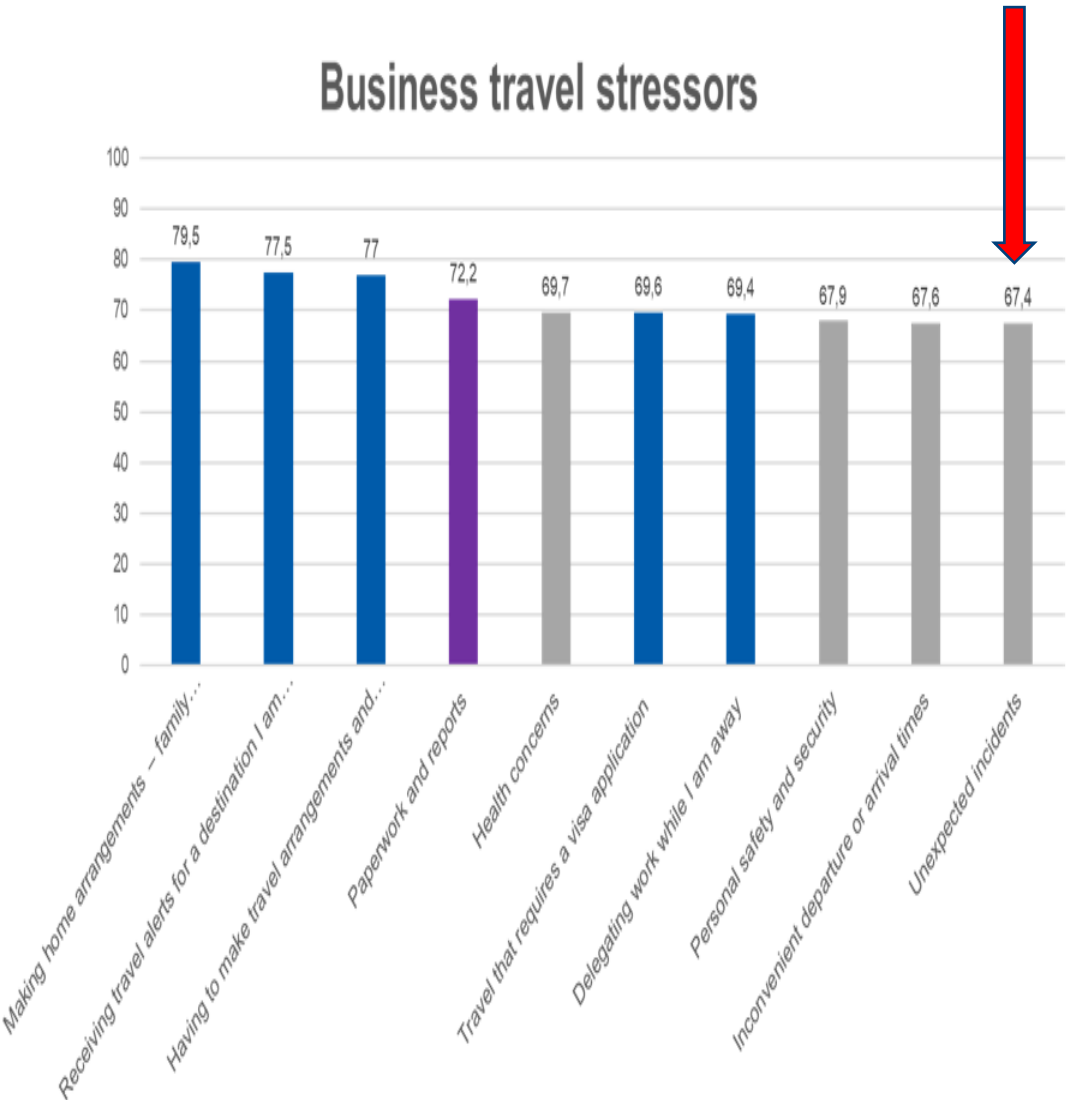
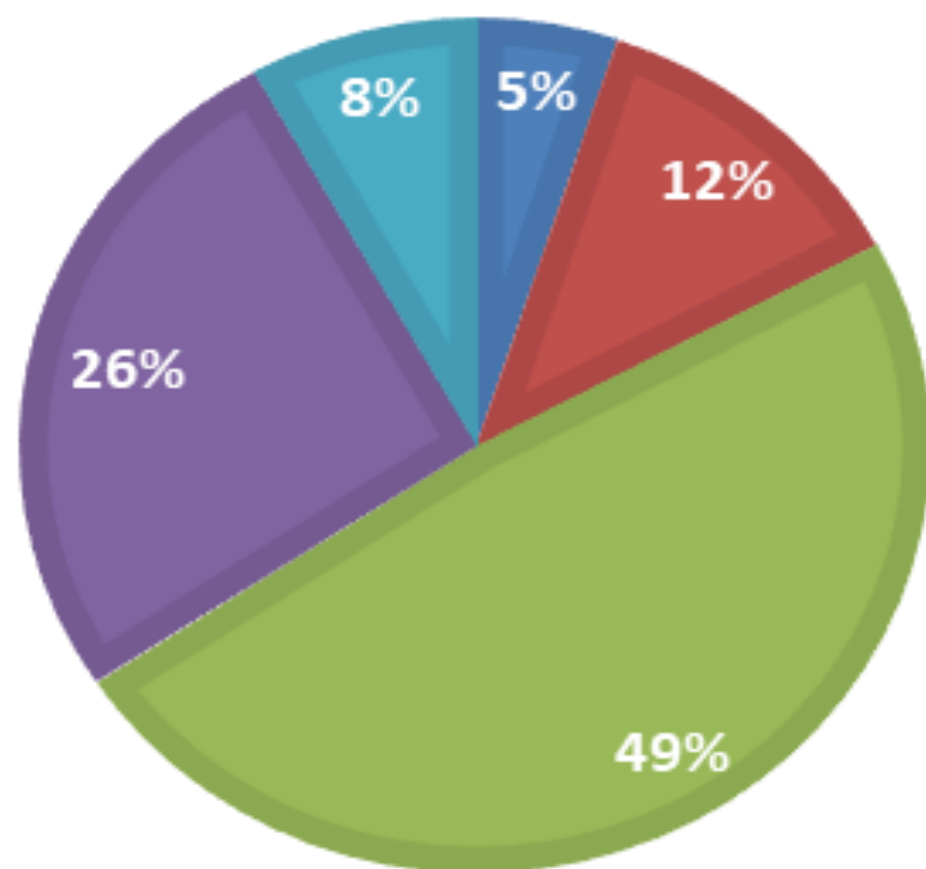


Figure 7: How stressful do the following make you feel before, during or after a business trip?

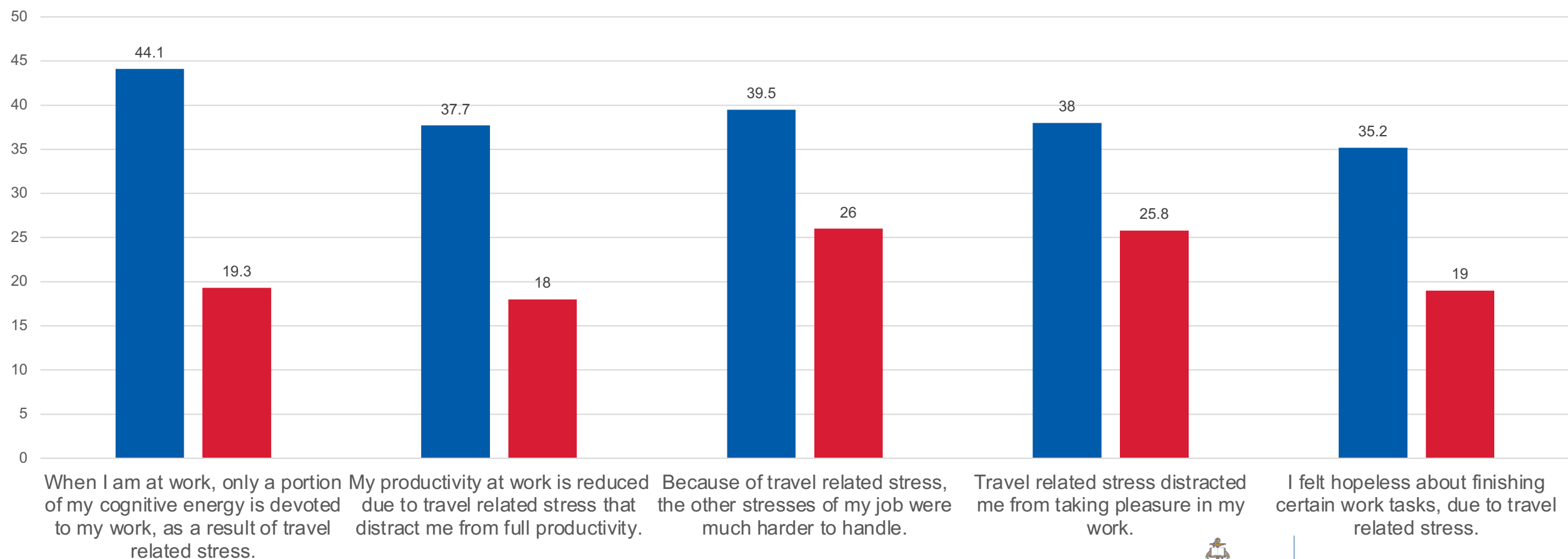


OVERALL STRESS LEVEL RELATED TO BUSINESS TRAVEL

■ Very high ■ High ■ Moderate ■ Low ■ Very low



PRESENTEEISM

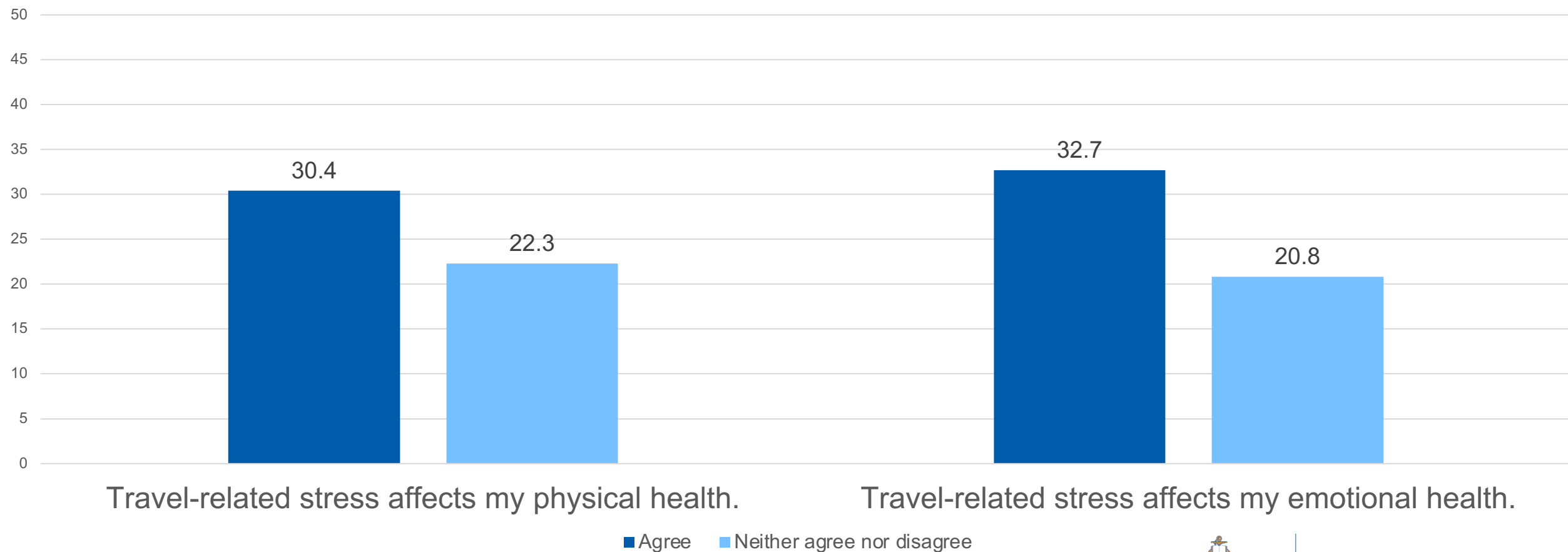


■ Agree ■ Neither agree nor disagree



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HEALTH OUTCOMES



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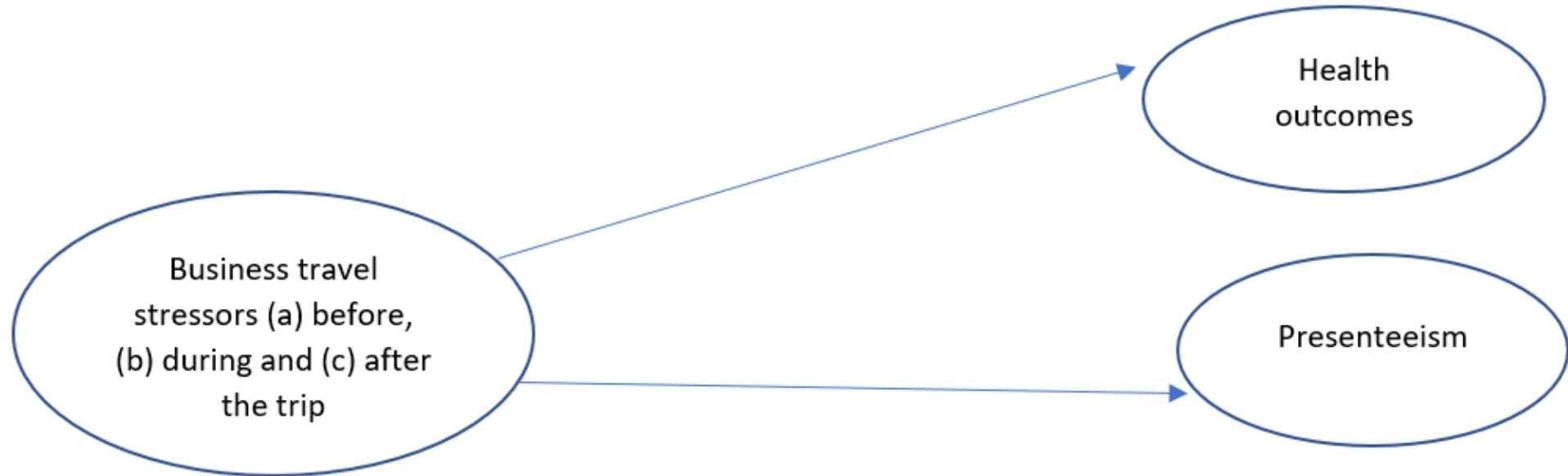
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MODEL



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	Decision
H _{1a} : There is a relationship between business travel stressors before a business trip and a business traveller's presenteeism.	Support
H _{1b1} : There is a relationship between unfamiliar routine and environment during a business trip and a business traveller's presenteeism.	Support
H _{1b2} : There is a relationship between workload and safety concerns during a business trip and a business traveller's presenteeism.	Support
H _{1b3} : There is a relationship between the inconvenience of business trips and a business traveller's presenteeism.	Support
H _{1c} : There is a relationship between business travel stressors after a business trip and a business traveller's presenteeism.	Support
H _{2b1} : There is a relationship between unfamiliar routine and environment during a business trip and health outcomes.	Support
H _{2c} : There is a relationship between business travel stressors after a business trip and health outcomes.	Support

✈ Business travellers lose an average of 2.3 days per month.



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RESULTS

- ✈ Top stressors were in the pre-travel phase.
- ✈ Relationships between business travel stressors and presenteeism.
- ✈ Relationships between business travel stressors and health outcomes.
- ✈ Business travel stress lead to adverse outcomes for organisations.
- ✈ A measurement of business travel stress in three travel phases.
- ✈ Business travel stress in the Global North vs. Global South.



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MANAGERIAL IMPLICATIONS



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ORGANISATIONAL SUPPORT

- Supportive HR practices **function as a buffer.**
 - **Organisational support and coordination** will assist travelers in managing travel stressors.
- Policies are typically **developed within functions other than HR.**
- **Cooperation between the different functions** should be strengthened.
- **Working conditions** should support work–life balance.



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TRIP ARRANGEMENTS

- ☎ Companies should assist travellers in terms of making arrangements for the trip (before the trip), satisfying personal and job needs while travelling (during the trip) and supporting them when they return to the office (after the trip).
- ☎ In addition, companies must provide **relevant information** to travellers about to undertake a trip (for example, cultural customs, vaccinations needed, accommodations and what to wear).
- ☎ Regular **risk assessments** of destinations to keep travellers updated on emerging risks in destinations.
- ☎ Capability of the traveller to **connect with their employer** (and the other way around) non-stop. A mobile app could be used for this purpose.



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COPING MECHANISMS

- ✿ Travellers are prepared to **respond to a range of potentially stressful events**.
- ✿ For example, employees will strive to **build up a social network** at work.
- ✿ Moreover, they can **build up a network of helpers** for child care solutions.
- ✿ **Stress management programmes should be offered** to travellers, which will result in a reduction in presenteeism and adverse health outcomes.



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COPING MECHANISMS

- ☛ Travel competence
 - ☛ An individual's capability and experience regarding **travel planning**, as well as their ability to **balance life and work**, handle travel **inconveniences and problems**, and **manage stress** levels during a business trip.
 - ☛ Increases their **self efficacy** and ability to develop their own methods of **combating travel-related stress**.



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TRAVEL POLICY

- 👤 Monitor the systems introduced and policy changes to **avoid adding another burden to travellers.**
- 👤 **Physical activity** can be reinforced by workplace practices and policies.
 - 👤 Employers can encourage regular physical activity among their business travellers by picking short-term stay rental apartments or hotels with well-appointed gyms.
 - 👤 An alternative approach could be offering travellers memberships to gym clubs with a national presence.
- 👤 Moreover, if access to **virtual communication** technology exists, companies should also evaluate if and when a business trip is vital.



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RECOVERY TIME

- ✚ This could be in the form of (1) time available to **recover** from jet lag and long haul flights (2) **relaxation** time whilst on a business trip through leisure or (3) **time to catch up** on tasks when returning home (e.g., laundry, shopping).
- ✚ Minimum rest period.
- ✚ Frequent breaks.



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OPENING SOON

University of Pretoria

Travel Medicine, Sleep, and Jet Lag Clinic

Travel Performance Optimisation

Our Travel Medicine, Sleep, and Jet Lag Clinic offers personalised travel health and recovery advice tailored to the needs of athletes, teams, academics, students, and business professionals.

Welcoming everyone to optimise their wellbeing, enhance performance, and make the most of every journey.

Additional Information



Services provided by trained medical professionals



Access to a dedicated travel health app



Flexible consultations — face-to-face or online

Services Rendered



Personalised health advice for travellers with specific needs



Malaria pre-exposure guidance



Destination- and route-specific travel health advice



Sleep hygiene and fatigue-management guidance



Jet lag prevention and management



Medical motivations / waiver certificates



Travel vaccinations



Contact us

Travel Medicine, Sleep, and Jet Lag Clinic,
@SEMLI, Burnett Street, Hillcrest Campus,
University of Pretoria, Hatfield, Pretoria,
South Africa.



012 – 420 6053/7



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Thank you



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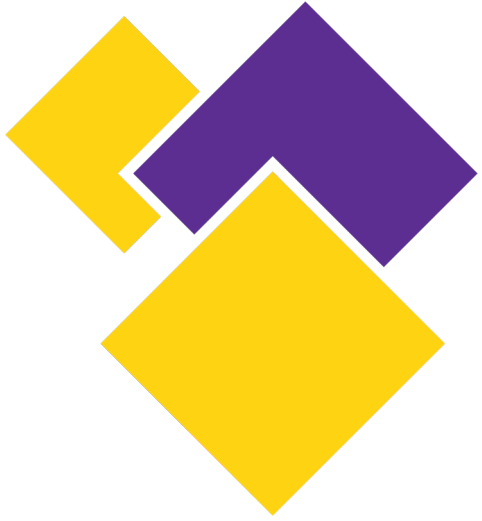
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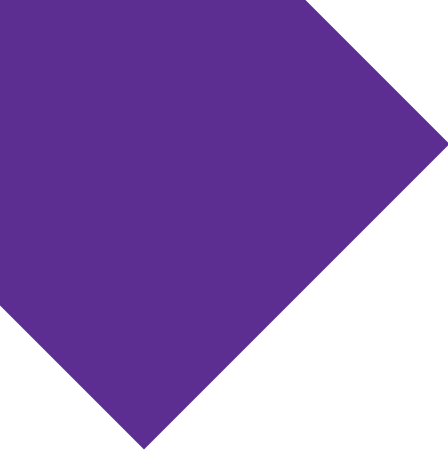
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Presenteeism & Loss of Talent

A Recruitment perspective



Loss from Presenteeism

- Reduced productivity
- Decline in overall team efficiency
- Reduced innovation
- Drop in morale
- Retention risk
- Financial loss – estimated 2.3 days salary per trip

Financial loss:

(2 trips per month losing 2.3 days per trip = 4.6 days)



Field Technician - R25 000 p/m (Junior)
R5 303



Regional General Manager – R80 000 p/m (Mid)
R16 982



CEO – R150 000 p/m (Senior)
R31 841

Loss of Talent



HR studies estimate that the total cost of replacing an employee ranges between:

- 50 – 100% of annual salary for Junior level talent
- 100 – 150% of annual salary for Mid level talent
- Up to 300% of annual salary for Senior/Specialised talent

Other Costs



Replacement Costs: advertising, agency fees, interview time, training



New hires typically take 3-6 months to reach full productivity



Other staff take on work leading to inefficiencies, remaining staff feeling overloaded



Loss of knowledge and experience



Risk of “Turnover Contagion”



Summary



Presenteeism quietly drains productivity, morale, and talent — and the financial cost is even greater than absenteeism. When people show up but aren't truly present, especially those under constant travel demands, performance drops, wellbeing suffers, and top talent eventually walks away. The real solution lies in building a culture that values balance, health, and meaningful performance — not just attendance.”

THANK YOU



Jane Smith



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www.propelp.co.za

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TEA BREAK & SPEED NETWORKING

See you back here at 12.00



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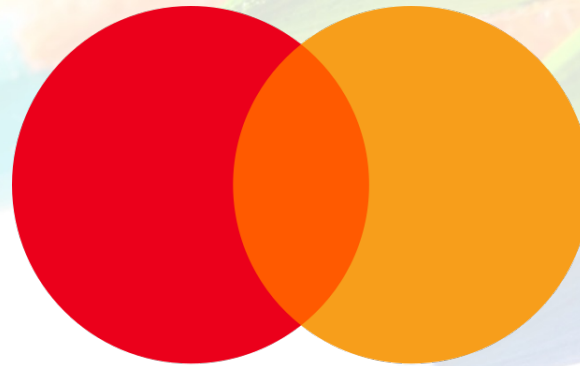
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A WORD FROM OUR SPONSORS

Min Smith

Director: Corporate Solutions | Business Development



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ANNUAL CORPORATE TRAVEL CONFERENCE 2025

STAY SHARP IN A SHIFTING WORLD



Practical AI tools to increase productivity & getting to grips with AI Deepfakes

Lasse Vinther

Founder – Automation Architects

ANNUAL CORPORATE TRAVEL CONFERENCE 2025

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AI beyond the hype

Status of AI in the travel sector and practical advice

Lasse Vinther - Founder

Automation Architects



Data and AI transformation partner

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&

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Agentic AI as a service

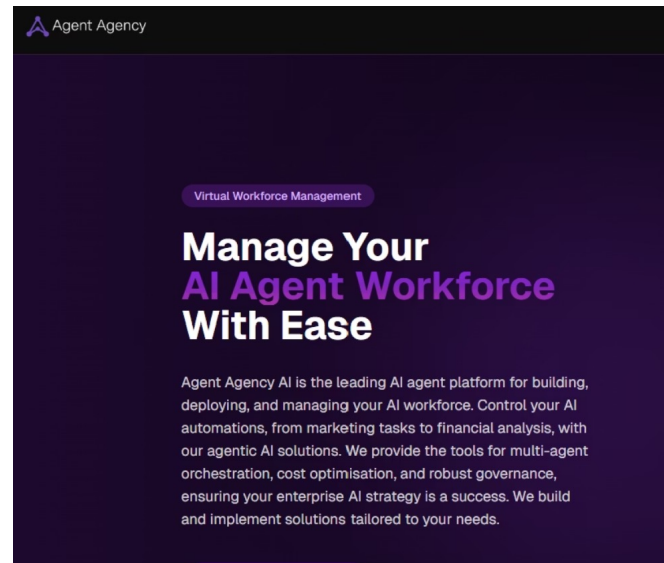
Data and agentic AI solutions



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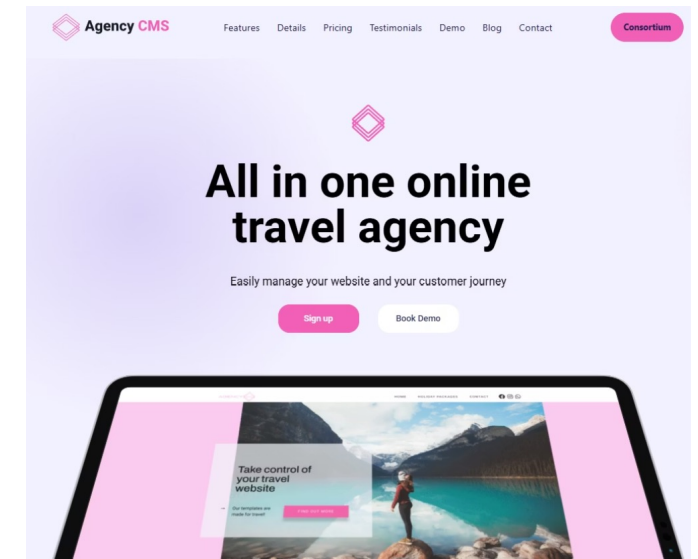
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www.traveltools.ai

Websites and agentic AI to 100+ ITCs



Agenda

1. Status: where are we?
2. Implementation
3. Challenges
4. Shadow AI
5. What to do

From Buzzword to Boardroom Priority

AI has rapidly evolved from a buzzword to a critical business imperative in travel and payments. Recent breakthroughs in Generative AI and machine learning have fueled explosive adoption globally.

Today, **72% of organizations leverage AI in at least one business function**. C-level leaders can no longer overlook AI's profound impact on customer experience, efficiency, and competitive advantage.

Let's cut through the hype, focusing on practical, real-world implementations and challenges.

We'll explore how AI, including the newer 'agentic AI' paradigm, is actively transforming travel and payments today.



Where are your customers going?

What to expect next (2025-2026)

- **Majority tipping-point:** If $\sim 2\times$ annual growth holds, AI-assisted search will exceed **60-70 % of trip discovery by late 2026**, making it the *de-facto* front door for leisure travel.
- **AI-native OTAs:** Watch for Booking/Expedia to expose full booking APIs to third-party agents, so consumers may never see their front-end again.
- **Voice & Agentic breakout:** With GPT-4o-style voice + image search, expect “show me this beach in July, find flights under \$500” to bypass text search altogether.
- **Search-engine SEO shake-up:** Destination sites and travel blogs will need structured content (schemas, embeddings) to stay visible inside AI answers rather than on page-1 of Google.

A Travel Consumer Revolution

3,500%

AI-Driven Traffic Surge

Year-over-year increase to U.S. travel sites by July 2025.

90%+

Business Travel Managers

At companies over \$50M revenue, now using AI.

96%

Corporate Travelers

Interested in an AI business travel digital assistant.

29%

U.S. Consumers

Currently using AI services to plan their trips.

This consumer revolution is particularly strong among younger demographics, with 18-34 year olds driving a 183% increase in AI-powered travel platform usage. In countries like India, adoption is even more pervasive, with 87% of travelers using AI for some aspect of their journey, predominantly for planning and booking.

Travel Industry: \$3.37B to \$13.87B by 2030

The travel industry is experiencing an unprecedented surge in AI adoption, transforming operations and consumer interactions.

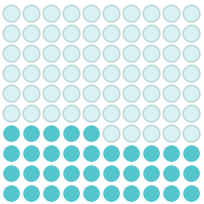
Market Growth

The AI in Travel market is projected to grow from **\$3.37 Billion in 2024** to **\$13.87 Billion by 2030**.

This represents a Compound Annual Growth Rate (CAGR) of **26.7% to 28.7%**.

Regional Dominance

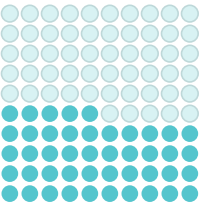
North America currently holds the largest market share, accounting for **38.7%** of the global AI in travel market.



35%

AI Mentions in Reports

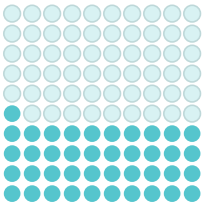
Of Skift Travel 200 companies mentioned AI in 2024 reports (vs 4% in 2022).



45%

Travel VC Funding

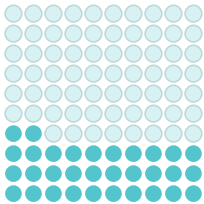
Went to AI-enabled startups in H1 2025 (vs 10% in 2023).



41%

North American Travelers

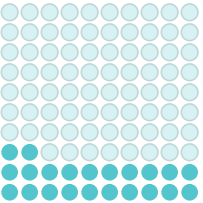
Used GenAI for trip planning in March 2024.



32%

AI-Influenced Revenue

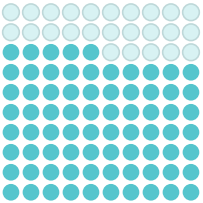
Of travel industry revenue is now directly influenced by AI.



22%

Mobile AI Chatbots

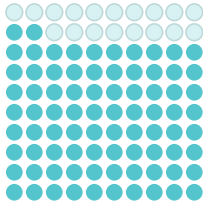
Of travelers used mobile AI chatbots for planning in 2024.



75%

Traveler Confidence

Of travelers express confidence in AI capabilities for their travel needs.



82%

Repeat AI Users

Who used AI tools for travel planning said they would use them again.



Industry leaders winning with AI

AI is delivering significant, measurable results for some of the biggest names in travel. These aren't just pilot programs; they're scaled implementations driving efficiency, enhancing customer experience, and generating substantial ROI across all segments.



Booking.com

- AI Trip Planner with OpenAI integration for discovery-driven experiences.
- Handles nuanced requests, like "romantic getaway with heart-shaped beds."
- ChatGPT app integration planned for October 2025.



Delta Air Lines

- 95% of customer queries handled by AI chatbots.
- Reduced unplanned maintenance activities using AI.
- Touchless passenger experience with facial recognition.



KLM Royal Dutch Airlines

- Partnership with BCG for an AI operations suite.
- 20-30% reduction in non-performance costs, saving millions.
- Strong ROI from AI initiatives, demonstrating clear financial gains.



Hilton Hotels

- Xiao Xi AI chatbot boasts a 94% customer satisfaction rating.
- Handled over 50,000 customer inquiries efficiently.
- "Connie" AI robot concierge, powered by IBM Watson, enhances guest services.

These case studies underscore that every segment of the travel industry is being transformed by AI. From customer-facing interactions to complex operational logistics, these household names are proving the value of AI, creating a competitive advantage that is becoming increasingly insurmountable.



2024-2025: We've Reached the AI Tipping Point

Doubled Adoption Rate

AI-based trip search adoption has approximately doubled every 12 months since ChatGPT's launch in late 2022, projected to reach **40% globally by mid-2025**.

Trillion-Dollar Market

The global AI market was valued at **\$638 billion in 2024**, with projections indicating a significant expansion to **\$3.68 trillion by 2034**.

State Of Generative AI

44

TOTAL MODELS

8

COMPANIES

7

MODALITIES

| Company Distribution

OpenAI

9

GPT-5 Pro, GPT-oss series, Sora 2, gpt-realtime-mini, GPT-5 Codex, GPT-image-1-mini

Mistral AI

8

Magistral series (reasoning), Voxtral (audio), Codestral 2508, enterprise offerings

xAI

5

Grok series, Imagine v0.9 (image generation)

Google

5

Gemini 2.5 variants, Gemini 2.5 Flash, Gemini 2.5 Computer Use

DeepSeek

5

V3.x series, DeepSeek-V3.2-Exp, 50%+ API price reduction

Cohere

5

Command series, Command A Reasoning, enterprise-focused solutions

Anthropic

4

Claude Sonnet 4.5 (Sept 2025), Claude 4 family, Claude Opus 4.1

Meta

3

Llama 4 Scout, Llama 4 Maverick (April 2025), open-weight models

Notable October 2025 Releases

OPENAI

GPT-5 Pro

Most advanced language model for high-accuracy applications

OPENAI

GPT-image-1-mini

Cost-effective image generation model

OPENAI

gpt-realtime-mini

70% cheaper voice model for real-time interactions

GOOGLE

Gemini 2.5 Computer Use

Enables AI agents to control computers directly

XAI

Imagine v0.9

Latest image generation capabilities

Market Trends



Multimodal Integration

Seamless handling of text, images, and other modalities together for more versatile AI assistants



Enterprise Focus

Enhanced security and customization for business applications with dedicated enterprise solutions



Open vs. Proprietary

Mix of open-weight models and proprietary solutions indicating different market strategies



Reasoning Capabilities

Dedicated reasoning models from multiple companies becoming a key differentiator

All About Enterprise



G-Suite

Well integrated

Low cost

Content generation

Great G-drive integration



Office 365

Big market share

Improving Copilot implementation

Can have license issues

Mixed performance depending on application



Open AI

Chat GPT as operating system

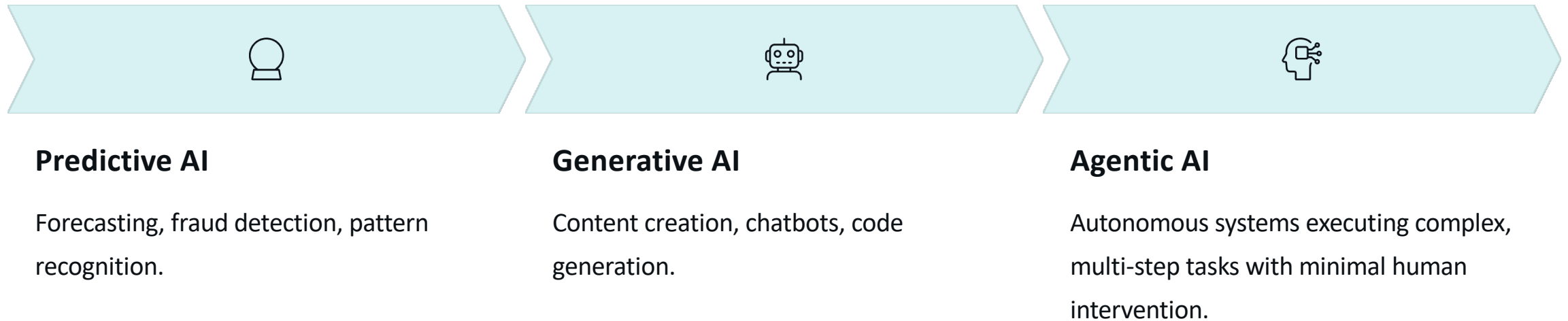
Improving Copilot implementation

Can have license issues

Mixed performance depending on application

From Gen AI to Agentic AI: The Paradigm Shift

AI is rapidly evolving, moving beyond predictive and generative capabilities towards autonomous, action-oriented systems.



Agentic AI takes action on the user's behalf, such as searching, comparing prices, booking, and making payments.

Gartner projects that by 2028, at least **15% of all work decisions** could be made autonomously by AI agents.

Agentic AI in Action: Quantifying the Impact

The operational efficiency and enhanced customer experiences delivered by Agentic AI in the travel sector are rapidly scaling, proving its transformative power.

A teal circle containing a white speech bubble with the letters 'SMS' inside, positioned above a horizontal teal line.

Expedia

- Managed over **29 million** virtual conversations.
- Saved an estimated **8 million hours** of human agent time.



Alaska Airlines

- Clara chatbot handled **1 million** conversations in a single year.



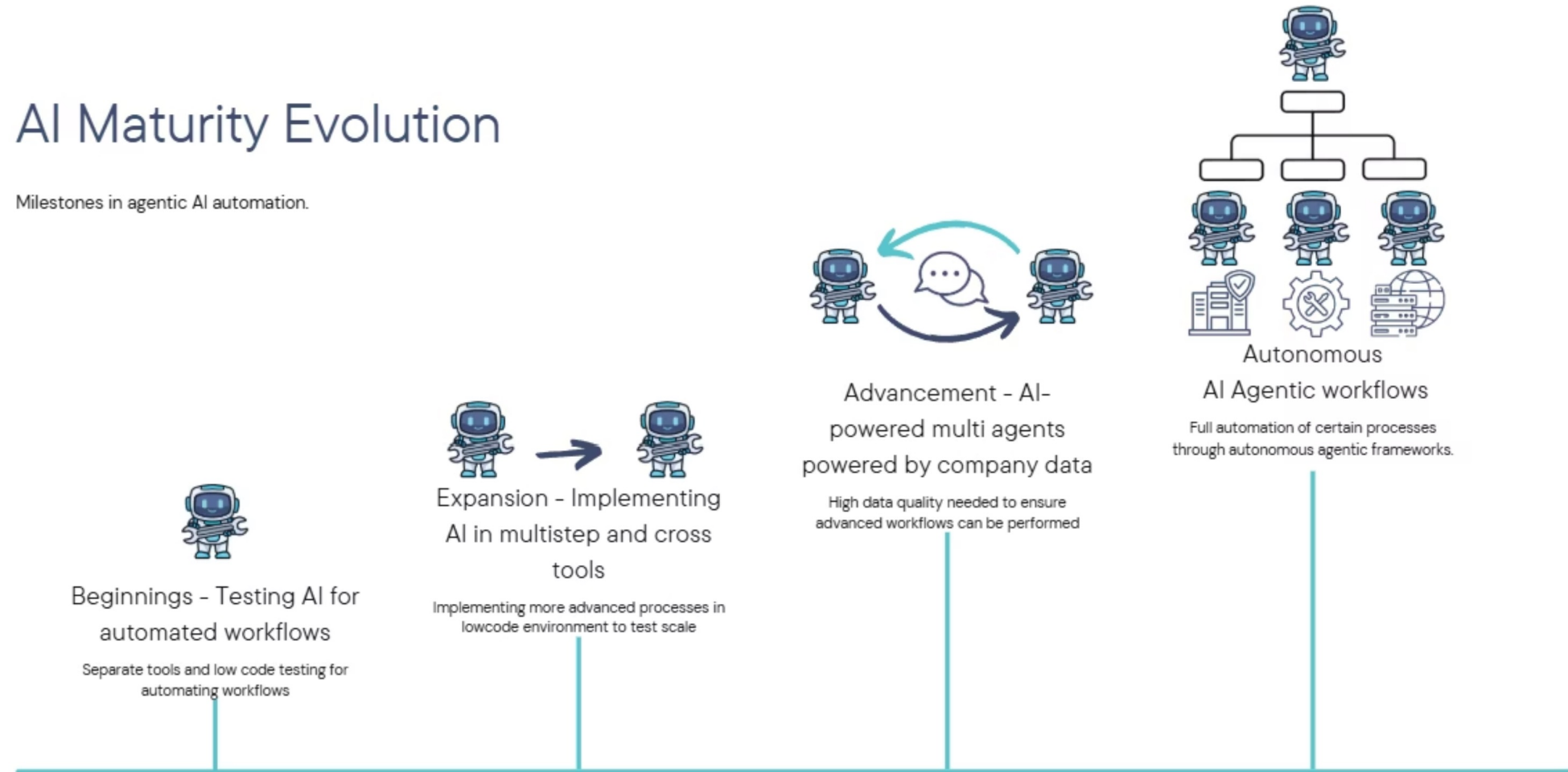
KLM

- AI system reduced average customer wait times from **15 minutes to just 2 minutes**.

This profound transformation highlights that chatbots are now the brand's frontline ambassadors. Their performance dictates brand perception, making their quality, design, and continuous improvement a top-tier strategic priority for marketing and service executives.

AI Maturity Evolution

Milestones in agentic AI automation.



Agentic AI: The Autonomous Revolution

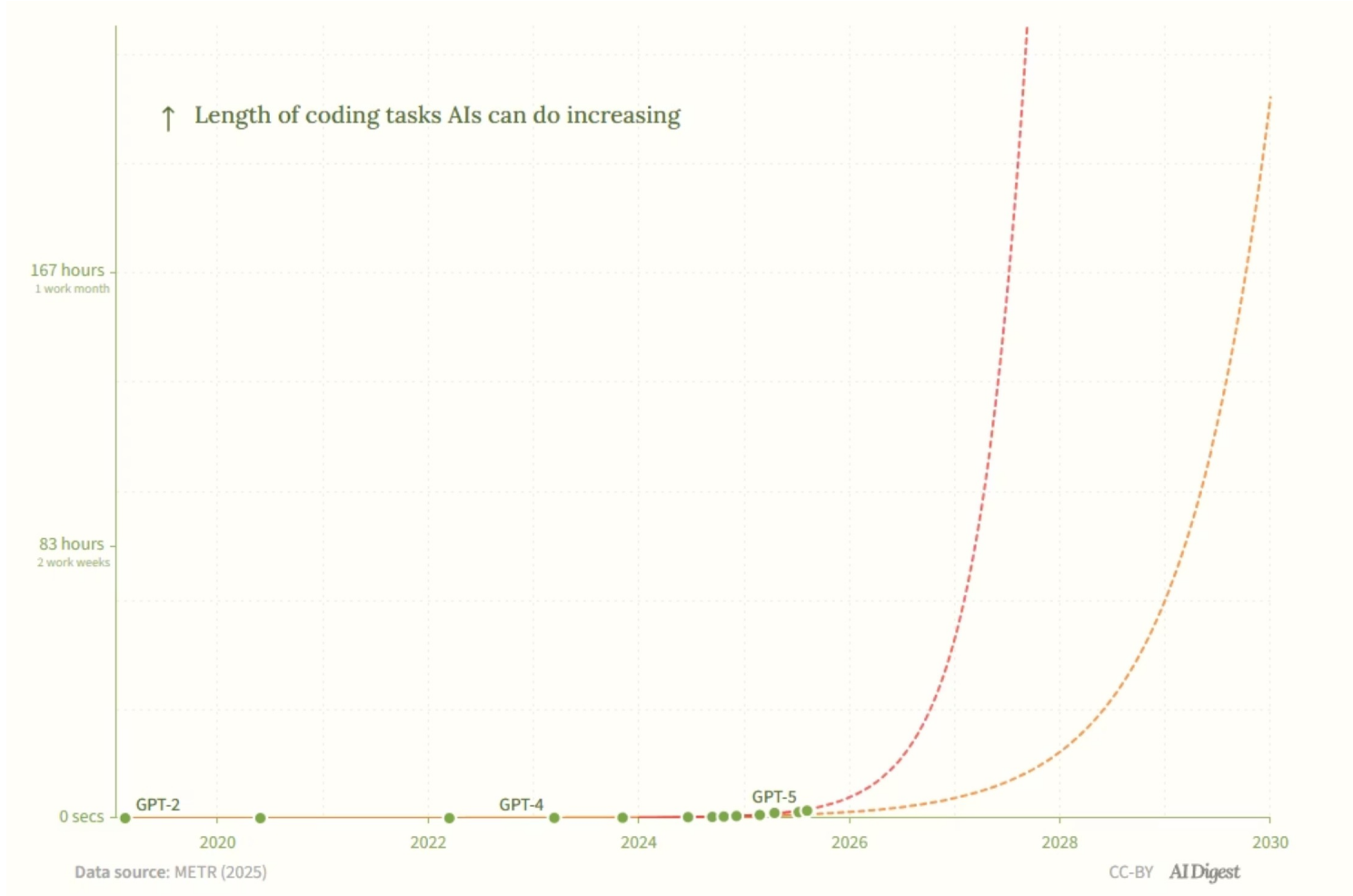
Agentic AI represents a fundamental shift from reactive to proactive, self-governing systems that execute complex tasks with minimal human oversight.

	Autonomy Makes decisions and takes initiative to achieve defined goals.
	Multi-step Reasoning Capable of breaking down and completing intricate tasks sequentially.
	Tool Usage Calls and interacts with external APIs and systems to extend capabilities.
	Memory Maintains long-term context, learned preferences, and past interactions.
	Collaboration Coordinates and interacts with other AI agents or human teams.

The Rapid Rise of Agentic AI

15%	33%	5-10%	99%
Work Decisions	Enterprise Software	Tech Spending	Developers Exploring
Projected autonomous decisions by AI agents by 2028 (McKinsey).	Expected to include agentic AI capabilities by 2028 (Gartner).	Allocated to agentic capabilities in the next 3-5 years (Bain).	Amount of developers actively exploring AI agents (IBM survey).

Projected exponential hourly autonomy for AI Agents



AI challenges

While the opportunities are vast, the potential pitfalls of unchecked AI adoption demand our attention and proactive mitigation strategies.



Unforeseen Ethical Traps

Algorithms can perpetuate and amplify existing societal biases. Ensuring fairness, transparency, and accountability in AI decision-making remains a critical challenge, especially in sensitive areas like hiring or criminal justice.



Reshaping the Workforce

While AI creates new jobs, it also automates routine tasks, leading to significant shifts and potential displacement in various sectors. The need for continuous reskilling and adapting to new roles is paramount.



Rise of AI-Powered Threats

The proliferation of deepfakes and advanced AI-driven cyberattacks poses serious risks to trust, national security, and individual privacy. Distinguishing real from synthetic content becomes increasingly difficult.



Your Industry, Under Attack: Deepfake Threats

The rapid advancement of generative AI has brought forth deepfake technology, a powerful tool for creation, but also a potent weapon for deception. Businesses now face unprecedented risks from sophisticated AI-generated content designed to mislead, defraud, and destabilize.



Financial Heists

AI-generated voice or video used to mimic executives, authorize fraudulent transactions, or gain access to sensitive financial systems, leading to massive losses and legal repercussions.



Brand Erosion

Fabricated scandal videos or audio clips designed to defame executives, employees, or the company itself, causing severe reputational damage, loss of trust, and market share.



Economic Instability

Spreading deepfake news or analyses to artificially inflate or deflate stock prices, disrupt markets, or undermine investor confidence, impacting entire industries.



Digital Impersonation

Advanced deepfakes enable sophisticated identity fraud, bypassing biometric security systems and gaining unauthorized access to accounts, sensitive data, and physical premises.

Your Industry, Under Attack: Deepfake Threats

While Shadow AI poses a pervasive threat, sophisticated deepfake attacks are directly targeting critical sectors like travel and payments, demonstrating their devastating financial and reputational impact.

Travel Industry Attacks

American Express Global Business Travel (Dec 2024)

- **AI-generated videos & audio** impersonated executives.
- Targeted employees, agents, clients for payment details & itineraries.
- Sophisticated multi-channel attack.

Arup Engineering (Hong Kong, Feb 2024)

- **\$25 million loss** from deepfake video conference.
- Multiple fake executives approved 15 fraudulent transactions.
- Discovered only after employee confirmed with head office.

Payments Industry Attacks

Hong Kong Bank Manager (2024)

- **\$35 million loss** via AI voice cloning of company director.
- Supported by convincing fake emails and documentation.

Indonesian Financial Institution (2024)

- **\$138.5 million estimated loss.**
- 1,100+ fraudulent loan applications & 1,000+ deepfake accounts.
- Bypassed biometric verification with deepfake images.

These incidents highlight that both travel and payments are primary targets for sophisticated, multi-faceted deepfake attacks. Traditional security measures are proving ineffective, and single incidents can cost tens of millions, demonstrating the urgent need for enhanced vigilance.



The Strategic Implications: Why Business Leaders Are Focused on the Wrong Threat

The data reveals a massive strategic misallocation of security resources and attention, focusing on less impactful threats while ignoring more prevalent dangers.

Media vs. Reality

- Deepfakes dominate cybersecurity headlines and conference discussions.
- Shadow AI receives minimal coverage despite being **4x more prevalent**.
- Investment in deepfake detection tools far exceeds investment in Shadow AI governance.

Resource Allocation

- Organizations deploy sophisticated deepfake detection systems.
- Only **17%** have technical controls to prevent data uploads to AI platforms.
- **83%** rely on training sessions, warning emails, or wishful thinking for Shadow AI prevention.

Defining Shadow AI

Shadow AI refers to the unauthorized or unsanctioned use of artificial intelligence tools and services by employees within an organization, operating outside the purview and control of IT or management.

1

Unauthorized Tool Usage

Employees leverage consumer-grade or third-party AI platforms without official approval, circumventing corporate IT policies and security protocols.

2

Data Exposure Risks

Sensitive company information, intellectual property, or confidential data can be inadvertently or intentionally uploaded to public AI models, leading to significant breaches.

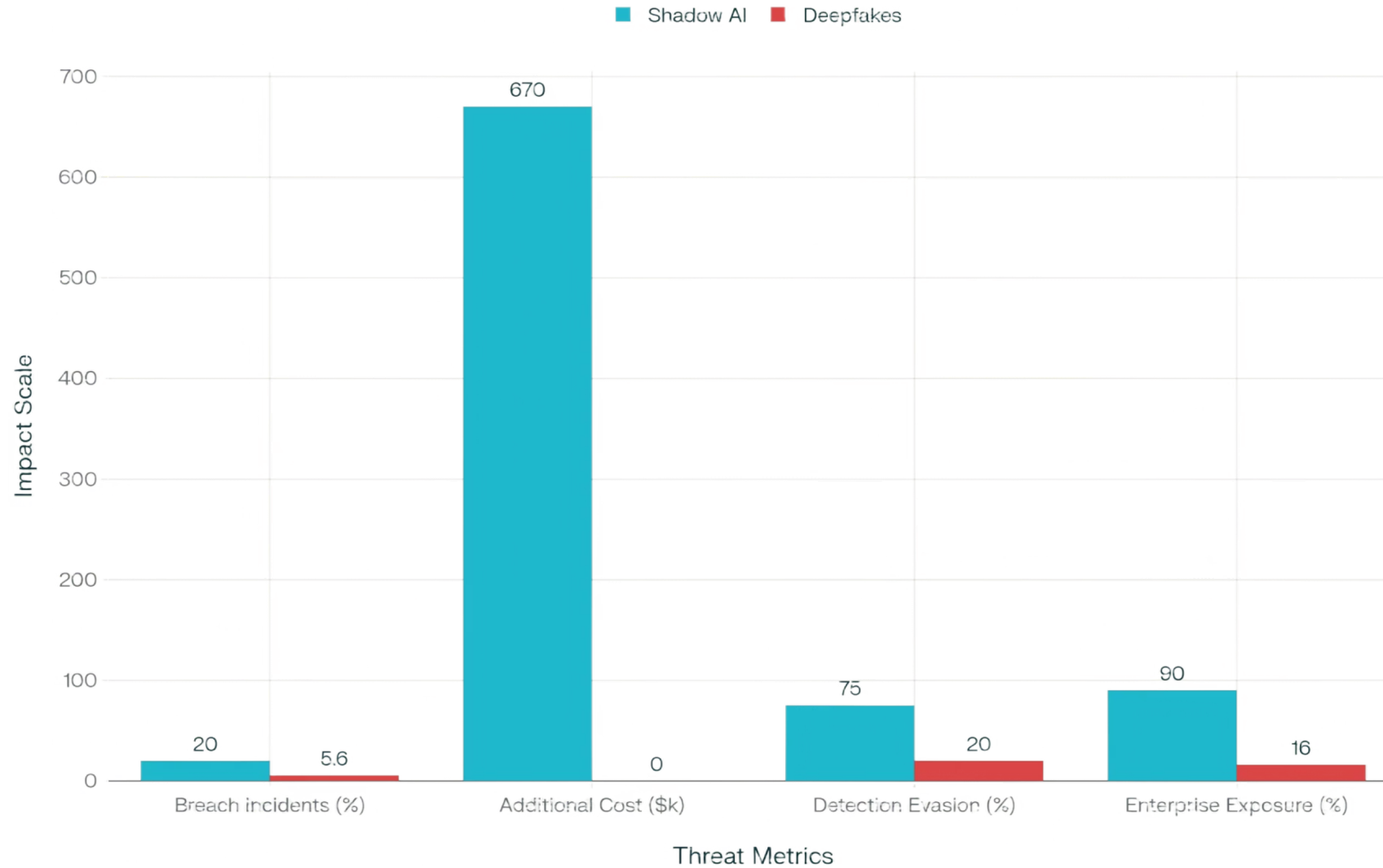
3

Absence of Governance

Without central oversight, there are no mechanisms for ensuring accuracy, compliance, ethical use, or data privacy, creating unmitigated operational and legal risks.



Shadow AI vs Deepfakes: The Hidden Threat Is 4X More Dangerous



The Regulatory and Compliance Nightmare

Shadow AI creates immediate and severe compliance violations that dwarf deepfake-related regulatory concerns, exposing organizations to significant legal and financial risks.

Immediate Compliance Breaches

- **GDPR Article 30:** Invisibility of AI usage prevents maintenance of required records for data processing activities.
- **CCPA Section 1798.130:** Companies cannot fulfill personal data deletion requests due to unknown data holdings within shadow AI systems.
- **HIPAA § 164.312:** Healthcare organizations face breaches by failing to maintain necessary audit trails with unmonitored AI.

Escalating Financial Penalties

- **32%** of breached organizations paid regulatory fines, with **48%** exceeding \$100,000.
- The regulatory landscape is rapidly expanding, with **59 new AI regulations** issued in 2024 alone, making compliance increasingly complex and costly.

The Staggering Scale:

Shadow AI Dominates the Threat Landscape

Despite media focus on sophisticated AI attacks like deepfakes, the hidden threat of Shadow AI is causing significantly more real-world damage and financial loss to organizations globally.

20%

Global Data Breaches

Caused by Shadow AI incidents.

5.6%

Global Data Breaches

Caused by Deepfake incidents.

\$670K

Additional Breach Costs

For organizations with high Shadow AI usage.

→ 90% of Companies

Experience Shadow AI usage, with only 40% maintaining official subscriptions.

→ 86% of Organizations

Are completely blind to their AI data flows, leaving them vulnerable.

→ 97% of Breaches

Linked to AI occurred in organizations lacking proper access controls.

The Shadow AI Crisis

Shadow AI isn't just a compliance issue; it's a rapidly escalating crisis with profound implications for data security, operational efficiency, and competitive advantage.



Rampant Unauthorized Adoption

75% of knowledge workers use AI at work, with **78% bringing their own tools**. A significant **57% hide their AI use**, creating a widespread but invisible dependency that undermines official policies.



Critical Visibility Gaps

Organizations lack visibility into nearly **90% of employee AI usage**. Most logins bypass identity controls (**70%+ personal accounts, 58% bypass SSO**), leaving IT blind to potential risks.



Uncontrolled Data Exposure

Despite policy concerns, **62% of users paste internal process info** and **48% paste non-public company data** into GenAI tools, risking massive intellectual property and privacy breaches.

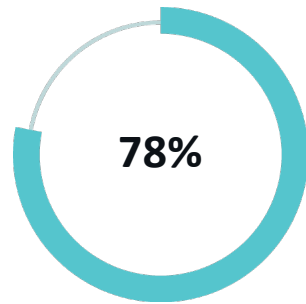


Explosive Application Sprawl

96% of businesses now use GenAI apps (tripled in 12 months), with an average of 10 apps per enterprise. This unmanaged proliferation, including risky browser extensions (**5.6% malicious**), creates an ungovernable landscape.

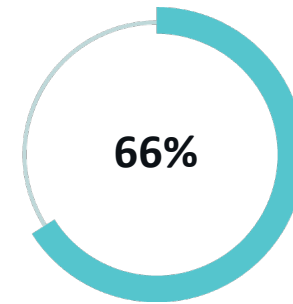
The Shadow AI Crisis

The "shadow AI" phenomenon has created an unprecedented situation where employees and management are essentially at war over AI adoption, with neither side fully honest about their usage and intentions.



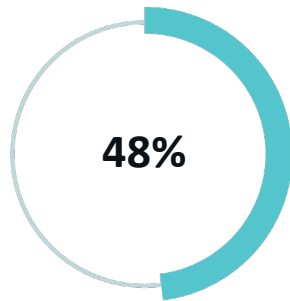
Unapproved AI Tools

Employees are using tools explicitly prohibited by company policies.



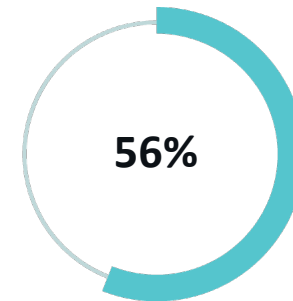
No Accuracy Check

AI outputs are used without evaluating their reliability or factual correctness.



Data Uploaded Publicly

Sensitive company information is being shared on public AI platforms.



Work Mistakes

Errors occur due to over-reliance on AI without human verification.

This widespread stealth usage represents a massive compliance failure, exposing companies to significant security, legal, and reputational risks.

The Hidden Costs: What Companies Aren't Measuring

Beyond the obvious job losses and failed investments, unmanaged AI adoption is creating insidious hidden costs that most organizations are failing to track, leading to significant long-term damage.

Escalating Data Breaches

Shadow AI usage directly contributes to data breach costs, with an average increase of **\$308,000 per incident** for affected companies.

Soaring Compliance Risks

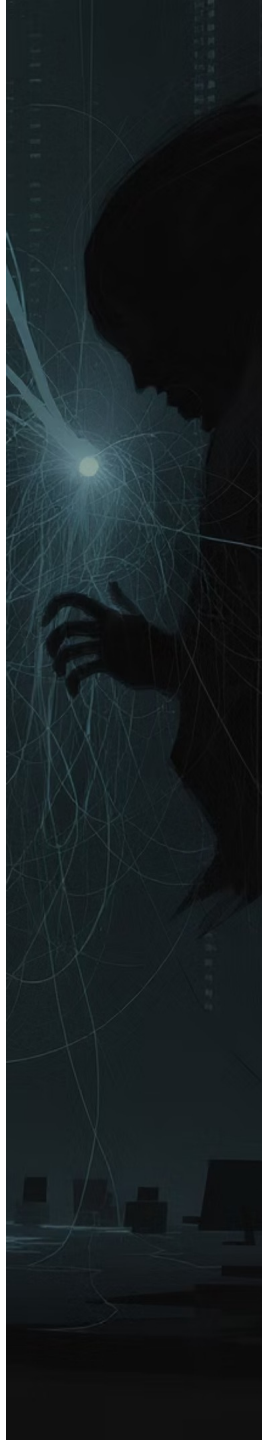
Employees bypassing official channels with unauthorized AI tools leads to surging compliance violations and potential regulatory penalties.

Intellectual Property Leakage

Sensitive corporate data uploaded to public AI platforms risks intellectual property theft and competitive disadvantage.

Workforce Demoralization

Employees feel pressured to use unapproved AI for productivity gains, leading to distrust, decreased morale, and potential talent drain.



The Business Impact: Shadow AI Causes More Damage Where It Hurts Most

Shadow AI isn't just a compliance issue; it's actively eroding your business's most valuable assets and creating profound organizational vulnerabilities.



Customer PII Exposure

Shadow AI breaches expose customer Personally Identifiable Information at a rate significantly higher than the global average (65% vs 53%).



Intellectual Property Compromise

A staggering 40% of Shadow AI incidents lead to the compromise of critical intellectual property, threatening competitive advantage (vs 33% global average).



Negative Business Outcomes

Nearly 8 out of 10 organizations have experienced detrimental effects, including data leakage and inaccurate results, directly from Shadow AI usage.

Critical Organizational Blind Spots

1

Top Security Concern

69.5% of organizations identify AI-powered data leaks as their primary security worry.

2

Shadow AI vs. General AI

48.5% specifically express concern about Shadow AI, compared to only 16% for general AI-powered attacks, highlighting a targeted fear.

3

Lack of Policy

Only 37% of organizations have established policies to effectively manage or detect Shadow AI activities.

Shadow AI Mitigation Framework

Step 0: Amnesty & Safe Harbor (2 weeks)

No-penalty disclosure for existing AI use; quick risk triage (Green/Amber/Red).
Immediate enablement: provide approved endpoints and prompt/pattern repo.

Step 1: Submit "Experiment" (2 weeks)

Problem & metric, baseline, data class, intended model(s), expected Δ Metric.

Step 2: Run (≤ 4 weeks)

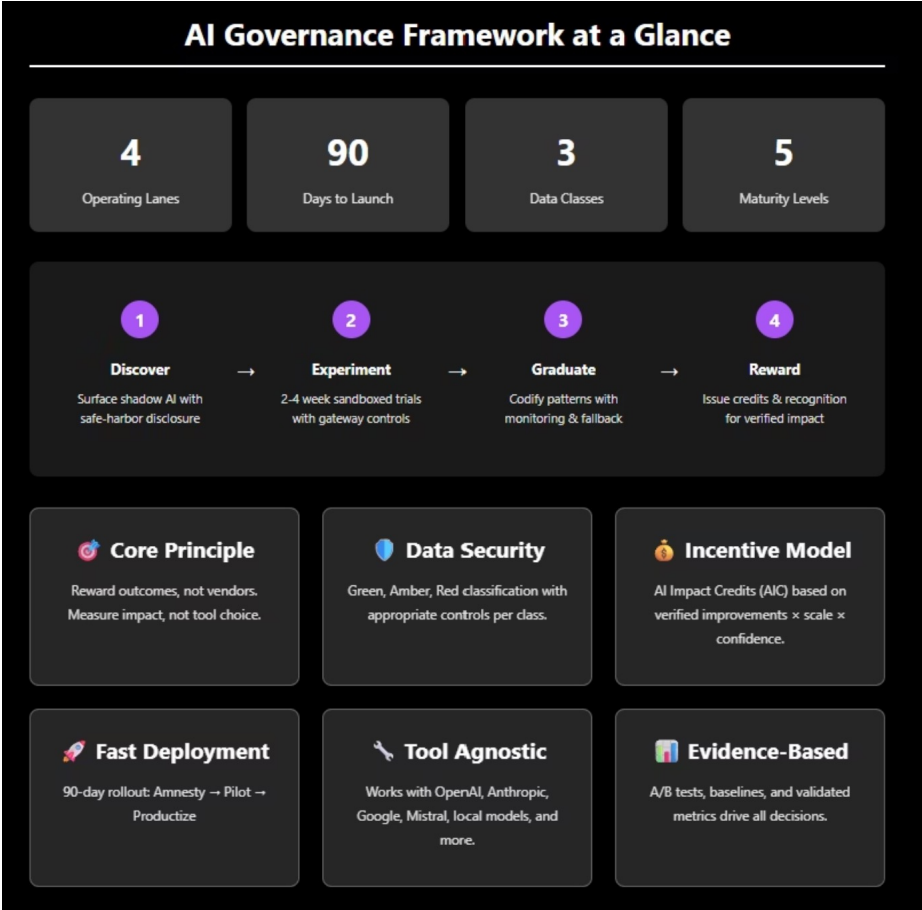
Use gateway; keep small (one metric, one team). Document prompts/workflows; add tests/fallbacks.

Step 3: Validate & Award

Steward verifies method; Process Owner signs off. Credits calculated → rewards issued; reusable assets moved to Pattern Library.

Step 4: Graduate

Wrap as a repeatable pattern (CLI/script, API flow, RPA step, or SOP). Add monitors (SLOs, drift, safety) and an owner.





Real Returns from Real Implementations

AI isn't just about buzzwords; it's delivering tangible, measurable results across the travel industry. From financial gains to enhanced customer experiences, the numbers speak for themselves.

3.7x

Average ROI

3.7x Return on investment from GenAI implementations.

10.3x

Top ROI

10.3x Achieved by top-performing AI implementers.

6%

Cost Savings

6% Annual cost savings achieved through AI adoption

13.8%

Productivity Increase

13.8% Average increase in operational productivity.

59%

Executives Report

59% Increased productivity due to AI.

50%

Wait Time Reduction

50% In customer service interactions.

80%

AI Handled Interactions

80% Of customer interactions managed by AI chatbots.

85% of AI projects fail. Here's why.

Despite the massive investment and hype, a staggering majority of AI initiatives are falling short, failing to deliver on their promised value or even move beyond the pilot stage.

85%

Failure Rate

AI projects that fail to deliver tangible value (Rand Corporation, Gartner)

15%

Success Rate

Projects that successfully move beyond pilot to scaled implementation (BMC Software)

The Brutal Reality: Statistics That Speak Volumes

1

Stalled Progress

Only 30% of projects move past the pilot stage, indicating a major block in scaling innovation.

2

GenAI Disappointment

95% of Generative AI pilots fail to achieve rapid revenue acceleration, highlighting a disconnect between potential and practical impact.

3

Rising Abandonment

42% of companies abandoned most AI initiatives in 2025, a sharp increase from 17% in 2024, signaling growing disillusionment.

4

Value Gap

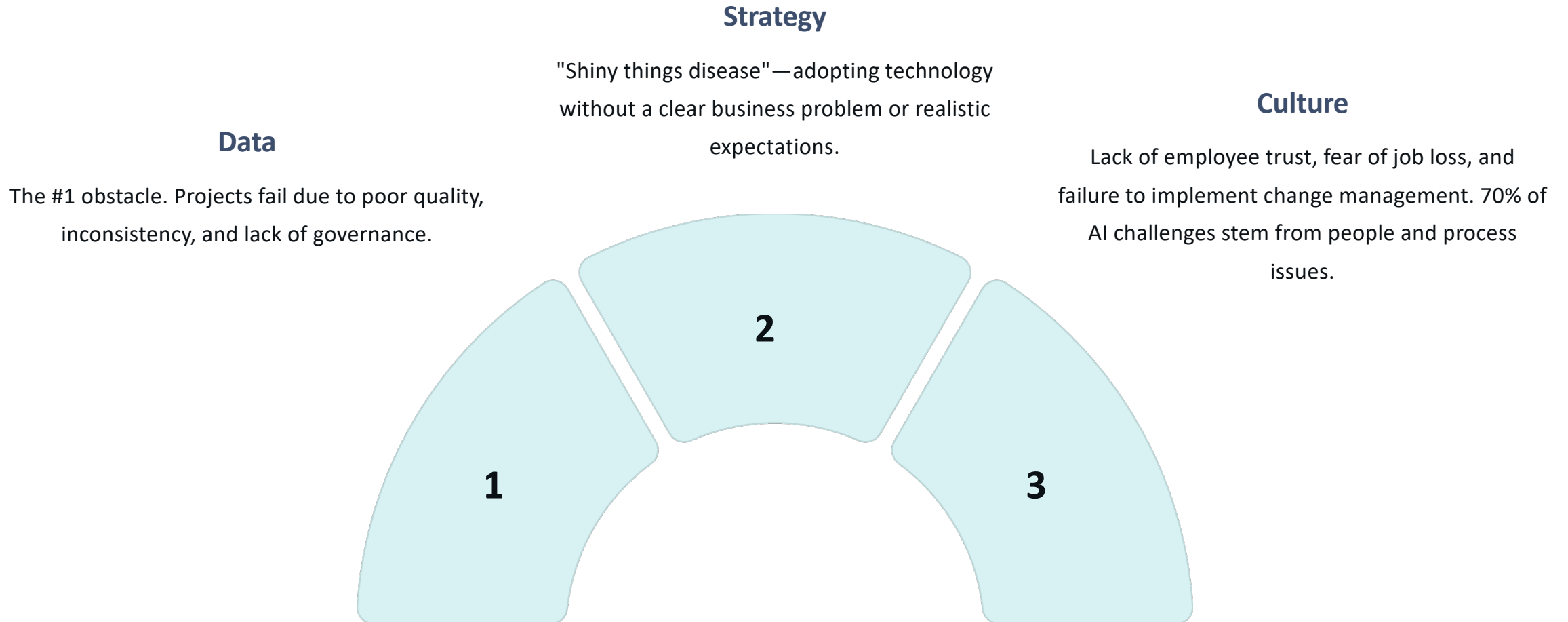
74% of companies struggle to achieve and scale value from their AI investments (McKinsey & Company, Boston Consulting Group).

Key Predictions & Takeaways

- Accelerating Failures:** 30% of GenAI projects will be abandoned by the end of 2025 (Gartner).
- Agentic AI Challenges:** 40% of agentic AI projects will be canceled by the end of 2027 (Gartner).
- Data Dependency:** 60% of AI projects will fail without AI-ready data (Gartner).
- Expert Guidance is Crucial:** The failure rate is nearly double traditional IT projects, and it's worsening. Even with cutting-edge technology, most organizations lack the execution capabilities needed for success.

The Three Pillars of Failure: Data, Strategy, Culture

Failure is overwhelmingly rooted in foundational deficiencies, not technology.



It's not the technology—it's the people

While AI algorithms and technical infrastructure capture much of the attention and investment, the true hurdles to successful AI adoption lie within an organization's human element.

70% People & Process

AI challenges stem from human factors like change management, leadership, and operational integration (BCG).

20% Technology

Problems with tools, infrastructure, and technical implementation account for a smaller portion of failures (BCG).

10% Algorithms

The actual AI models themselves are rarely the primary cause of project failure (BCG).

The Human Hurdles

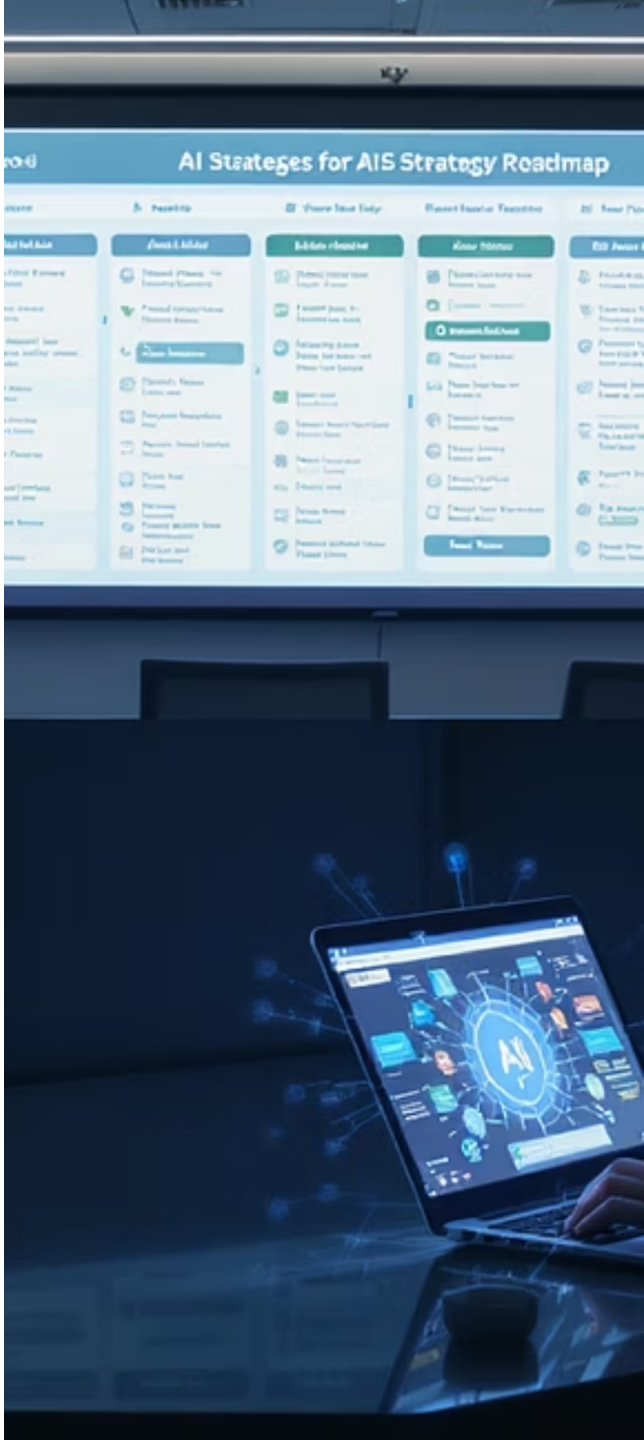
Employee Resistance

- 52% concerned about AI (up from 37% in 2021)
- Excitement dropped from 18% to 10% (NTT DATA)

Skills Gaps

- 46% of leaders identify skill gaps as a significant barrier
- 35% cite shortage of skills and data literacy as a top obstacle (Informatica)

Addressing these human factors through effective change management, targeted training, and fostering a culture of trust is paramount. Without it, even the most advanced AI solutions are destined to fail.





Giving away 3 workshops valued at 25.000 each

"Mitigating Shadow AI"

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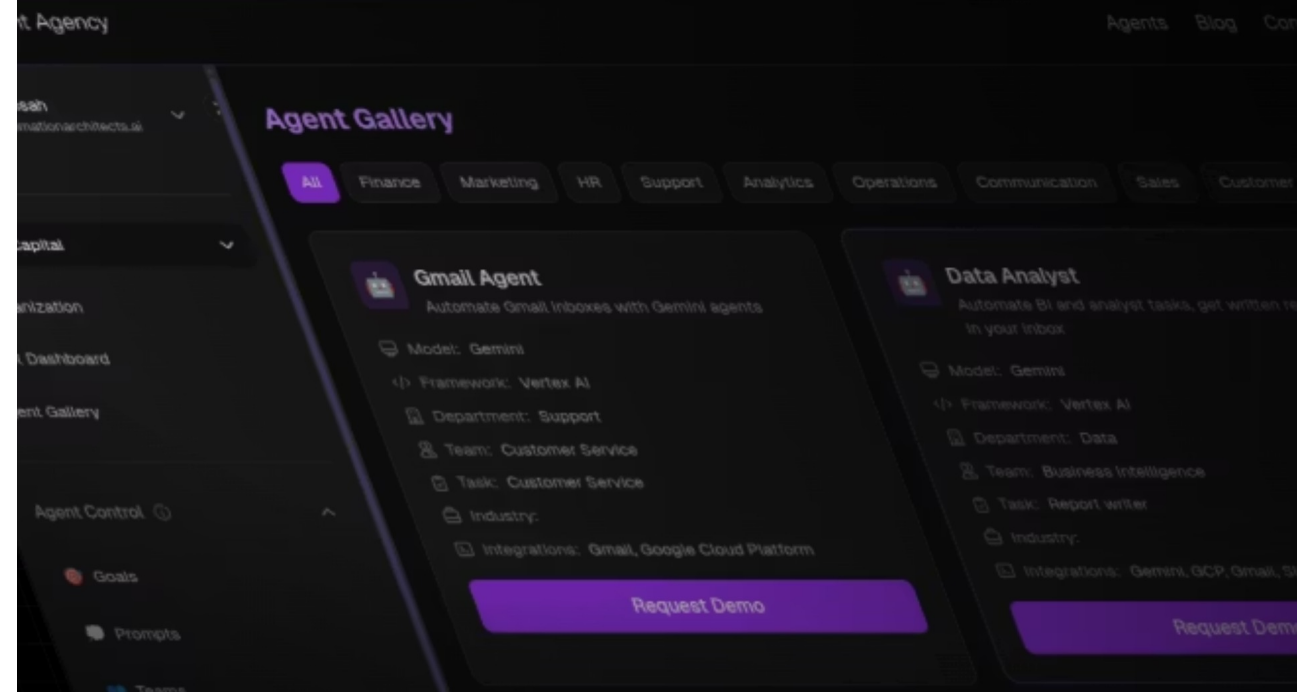
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Lasse Vinther

Manage Your AI Workforce Like Your Organization

Agent Agency is a workforce management platform that helps organizations, implement, manage, and control model agnostic agentic AI. Create full transparency of your AI adoption with staff level precision

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LUNCH @ BILLY G'S

See you back here at 13.45



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STAY SHARP IN A SHIFTING WORLD



A WORD FROM OUR SPONSORS

Shanell Mowers

Chief Operations Officer



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From Theory to Practical “Let’s make it real” Demos

1. Accessing NDC Content

Wayne Muirhead, Chief Sales Officer – Tourvest Travel Services

2. Virtual Card Workflow

Min Smith, Director: Corporate Solutions | Business Development – Mastercard

Nico Nyamupachitu, Mastercard Executive Consultant: Standard Bank – Mastercard

3. From Static PDF’s to Living Travel Policies

Kamogelo Maerman, National Sales Leader – FCM Travel

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Accessing NDC Content

(Online demo)

Wayne Muirhead

Chief Sales Officer – Tourvest Travel Services

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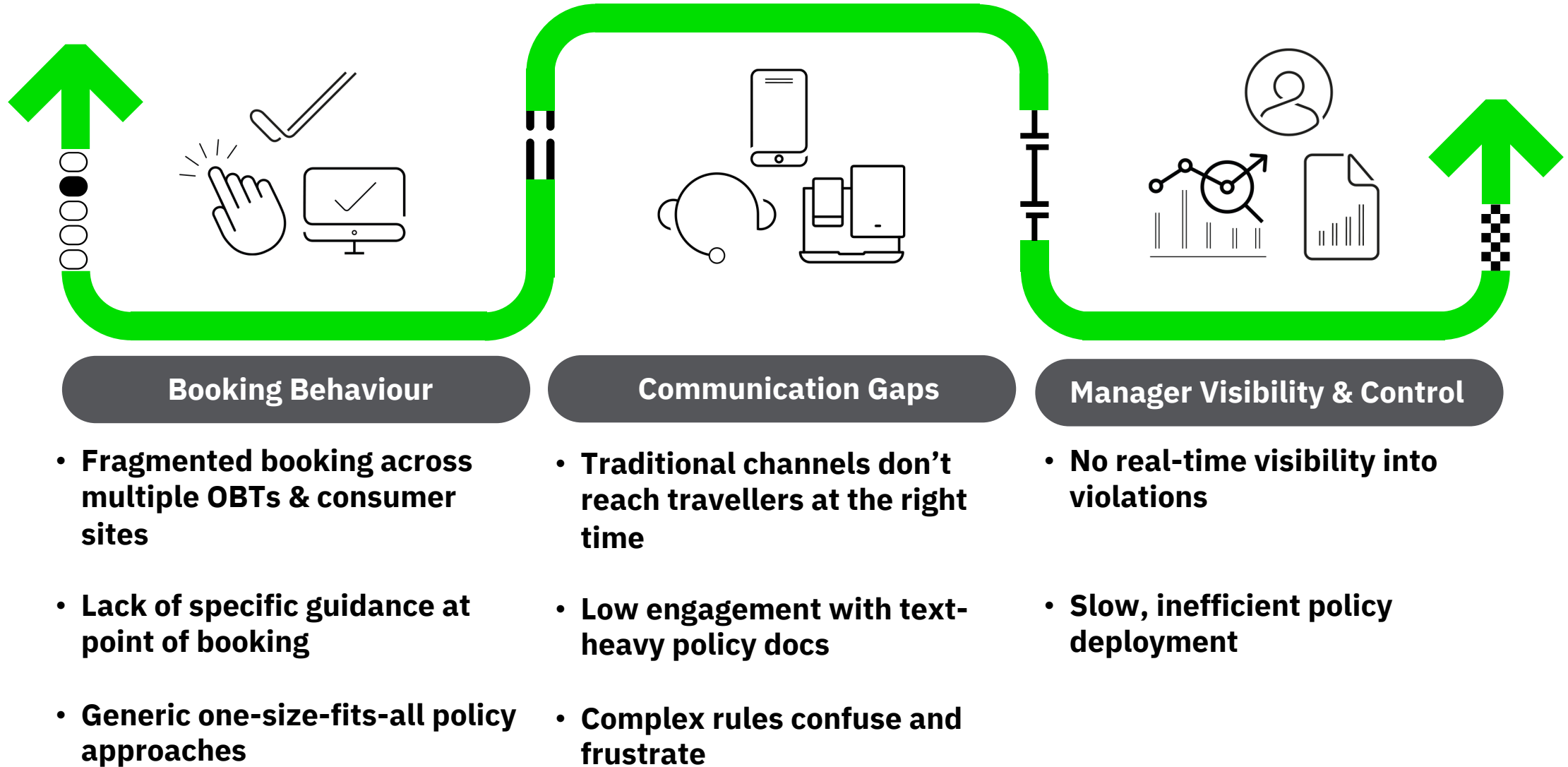
From Static PDFs to Living Travel Policies

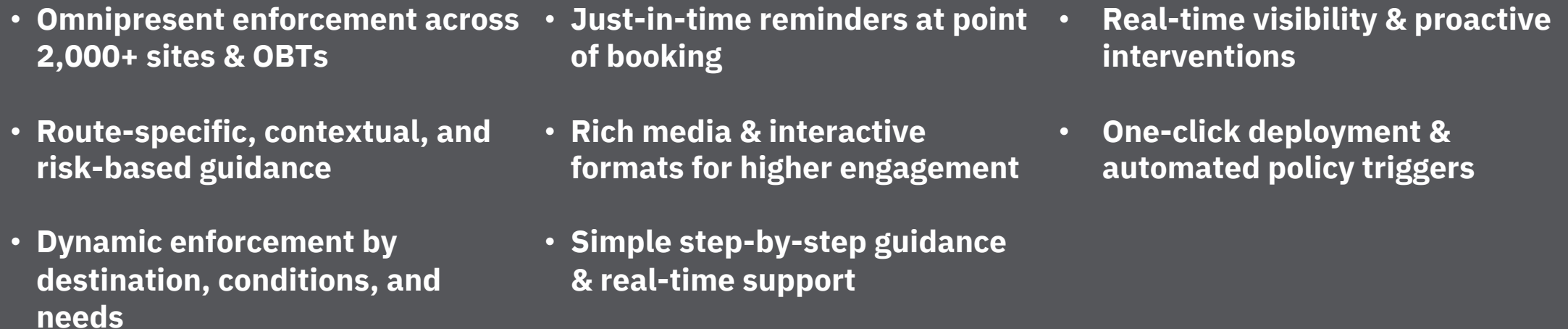
ABTA Conference

Date: 17th October 2025

Presented by: Kamogelo Maerman

Travel Policy Compliance Challenges





Reimagining the Future of Travel Policies

**Empowering travel
managers with
smarter insights**



**Personalisation at
the heart of policy
guidance**



**Proactively
protecting your
travel programme**



FCM

Thank you!



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AFRICAN BUSINESS TRAVEL ASSOCIATION

READING NOOK 1: ***“Key emergency strategies I learned when travel went sideways”***

Phale Naake, Director Strategic Procurement (Government Travel Services), National Treasury

READING NOOK 2: ***“How I Built Influence in a Company That Didn’t Value Travel at First”***

Pascalie Albrecht, Executive: Commercial Issuing |Business Banking Product – Absa

READING NOOK 3: ***“Key lessons learned when working with multi-cultural colleagues”***

Kgotso Ndaba, Lead Business Development Manager (B2B Travel) –SSA-CEMEA – Visa

READING NOOK 4: ***“What It’s Like to Be on the Other Side: From TMC to Client”***

Yvonne Radebe, Travel Coordinator Africa & Middle East – Cummins

READING NOOK 5: ***“From Motorcades to Microphones: What I learned when hosting VIP Guests”***

Adele Demos, Corporate Sales Manager – Tsogo Sun Casinos & Hotels

READING NOOK 6: ***“How I Survived a Global Travel Roll-Out”***

Thinus la Grange, Regional Travel Manager Africa – BAT

READING NOOK 7: ***“When the Card Says No: The Real Impact on Travellers and TMCs”***

Vimal Chhana, Commercial Issuing Product Manager | Product Design and Innovation | Personal and Private Banking – Nedbank

READING NOOK 8: ***“Grounded! Managing Common (And Bizarre!) Flight Disruptions”***

Fehmidah Johnson, Key Account Manager: Corporate – South African Airways

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TEA BREAK

See you next door at 16.15



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Industry Leaders Talk Trends

Knowing when to pay attention, and when to ignore the noise

Brian Kitchin

Franchise Services: Divisional Chief Commercial Officer – fastjet

Caroline Smallwood

General Manager Southern Africa – Amadeus

Claude Vankeirsbilck

Chief Operations Officer – Tourvest Travel Services

Hazel Zwane

Procurement Specialist – Sappi

Pascaline Albrecht

Executive: Commercial Issuing | Business Banking Product – Absa

Rebone Motsatsi

Executive, Car Hire Operations – Woodford

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