WHI JAPAN & NORTH ASIA Travel Tech Thinktank

Possibilities and Responsibilities of Travel In The Age of Generative Al Sponsored by: EY Strategy and Consulting

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Overview

Building on the Global Travel Tech Thinktank held at WiT Singapore in October 2023, the Tokyo event gathered industry leaders to discuss Al's impact on talent, product innovation, empowering the long tail, and over-tourism.

Its purpose was to brainstorm ideas under the umbrella theme of "The Possibilities & Responsibilities of Travel In The Age of Generative AI"

Key themes included...

Reimagining user interfaces, fostering unorthodox partnerships, and empowering smaller businesses. Challenges such as user adoption and data quality were identified, alongside opportunities like enhanced user experience and industry collaboration.

Recommendations included...

Focusing on customer-centric design, improving data readiness, and establishing industry standards for AI integration. The report highlighted AI's potential to personalize travel experiences, empower suppliers, and drive market growth, emphasizing the importance of strategic implementation and gradual rollout.



Overview

The Thinktank hosted keynote speakers who delivered thought-provoking speeches, followed by interactive workshops that facilitated in-depth discussions among participants



Section 1 : Keynote

Mr. Tomotaka Hirabayashi, a leading expert from EY, presented a deep analysis of the potential impact of generative AI on the tourism industry, followed by a panel discussion among industry leaders.

Section 2 : Workshop

Close to 40 key industry leaders from around the world participated in the workshop to brainstorm the way forward for travel in the age of AI and tech.





Section 1: Keynote

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Key Takeaways from the Keynote Session

- A human revolution is as necessary as the technology revolution unfolding in the world today if the travel industry is to navigate into the third age of digital travel with resilience, confidence and purpose.
- Humans, both those working in travel and our consumers, will have to adapt in tandem to the rapid digital transformation taking place.
- It is time to think differently, even laterally; experiment and test fast; and build for agility and nimbleness.



Tomotaka Hirabayashi, a Partner at EY argued that AI could bring back power to suppliers



1. Power Back To The Suppliers

- Tomotaka Hirabayashi, Partner, Strategic Impact Unit, Data Driven Re-Design Strategy, EY believes that "Al could bring back power to suppliers for the first time and the structure of industry could change dramatically. Al will facilitate supplier participation by visualizing and unbundling travelers' needs and will further accelerate the shift to an industry structure that empowers suppliers."
- However, the quandary is whether suppliers are ready to seize the opportunity, and will it benefit only the big with the scale, resource and data?

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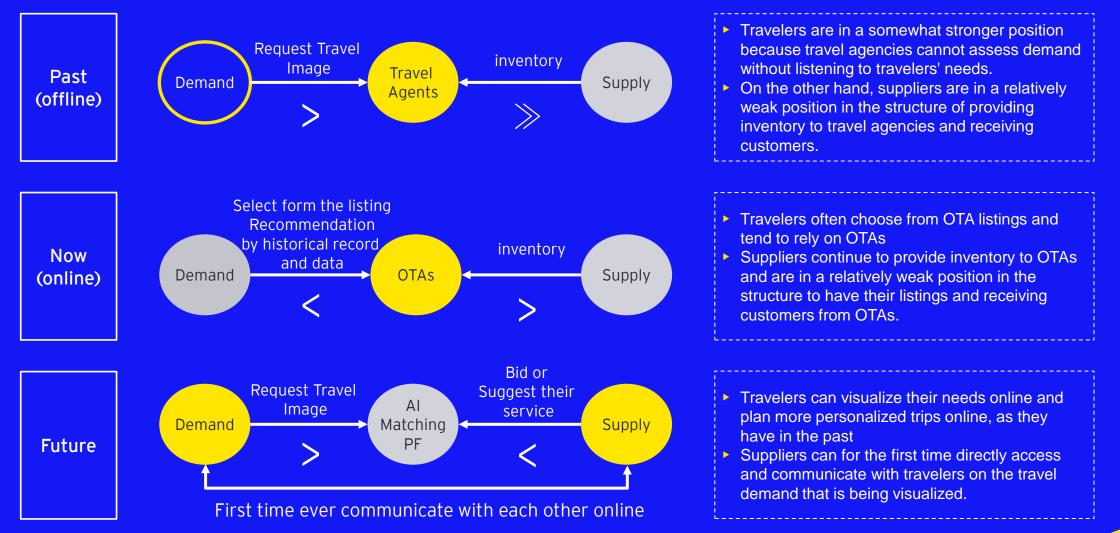
Al will have a significant impact on the tourism industry, transforming the balance of power within the industry

Summary:

- The tourism industry is on the verge of a significant transformation, driven by the rapid growth of the AI market and the potential for generative AI to disrupt existing business models. With a projected CAGR of 35.5% through 2030 and the potential to boost the market by an additional 15-40%, AI is set to become a major player in the industry.
- Al's impact on the tourism industry goes beyond personalization and efficiency. It has the power to empower suppliers by enabling direct communication with travelers and facilitating personalized experiences. This shift towards a more suppliercentric approach could reshape the competitive landscape, allowing suppliers to attract customers independently and offer tailored services.
- By leveraging AI to visualize and unbundle traveler needs, suppliers can enhance service sophistication and increase their autonomy. This transformation could lead to a more localized and personalized travel experience, meeting the unique needs and preferences of each traveler.
- As the industry evolves, the traditional intermediary-centric model may give way to a more supplier-centric approach. This shift in the balance of power could create new opportunities for suppliers to differentiate themselves and offer personalized services, ultimately changing the way travelers plan and experience their journeys.
- To remain competitive in this rapidly changing landscape, stakeholders in the tourism industry must embrace AI and adapt to these developments. The transformative potential of generative AI promises to revolutionize the industry, paving the way for personalized, dynamic travel experiences that cater to the ever-changing needs of travelers.
- As the tourism industry moves forward, those who harness the power of AI will be well-positioned to lead the way in shaping the future of travel. Embracing these technological advancements will be crucial for businesses looking to stay ahead of the curve and provide innovative solutions to meet the evolving demands of the market.



Al could bring back power to suppliers for the first time and the structure of industry could change dramatically



Key Insights were being shared as...(1/4)

2. Lessons From Beyond Travel

Could travel take lessons from retail?

An example was shared whereby Walmart is changing the user experience using Gen AI, where consumers can now search by themes, "I want to throw a party with a unicorn theme", as opposed to before when it was search by information gathering.

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The travel industry changes so much, with new hotels and other variables constantly shifting.

How do you make this data fresh and readily available for users?

Having the right data at the right time and then asking the right question balances that. It's not about making it happen just once; it's a journey.

You keep building the data foundation, the data platform, the data estate, to ensure it's fresh and accurate.

Ken Otani Executive Officer, Director of Azure Data & AI Enterprise Sales Lead at Microsoft



Key Insights were being shared as...(2/4)

3. Think Unorthodox Partnerships

Leveraging AI to the hilt means connecting as many data points as possible – linking transportation apps, to restaurants, to tours and activities, to credit cards. Think horizontally and the possibilities for linking up the traveller journey are endless.

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Let's walk through an example of user journey from booking an OpenTable reservation or purchasing a local tour through Viator, you will need a ride to get to the destination.

ML/AI plays a key role in Uber's business to make critical decisions like calculating the ETA, rider-driver matching to completing the transaction with frictionless and secured payment experience.

In addition to that, Uber employs AI to enhance its advertising tools, helping merchants grow their businesses. The ads delivery system shows the most relevant ads to customers, maximizing returns for merchants.

To optimize performance, Uber developed an Ads Simulator, which explores various configurations like ad placements and bidding strategies, replicating outcomes efficiently and cost-effectively.

Sheue Chee Beh Director at Uber



Key Insights were being shared as...(3/4)

4. Reimagining Of The User Interface

- In the rapidly evolving landscape of user interfaces, the future may see traditional search methods replaced by more dynamic interactions.
- Another challenge is that designing for increasingly shorter attention spans. From 12 seconds in 2000 to just 2-3 seconds today, capturing user attention has become more demanding than ever. How can such a complex product as travel be effectively presented in such a brief window?

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Maybe at some stage down the road, we can completely change the interface. It's no longer a user coming up to search. Maybe they're going to tell you something or they're going to show you a picture or whatever and you're going to start this engagement with the user from there.

We need to make it as easy as possible, as intuitive as possible, for customers. But the easier it is on the surface, the harder it is for us under the surface.

David Liu Chief Product Officer at Klook

5. Keeping up with the pace of change: Reskill and build for agility

- Rapid reskilling is needed for the workforce to work with the new tools to ensure their jobs are not displaced. And while there was much talk about AI replacing skills, not jobs, the reality is, many tasks will be taken over by the machine and humans will have to figure out their place in the value chain.
- One practical tech solution is to build flexible and modular systems which allows for rapid adaptation of the tech infrastructure and for systems to be decoupled to meet shifting consumer demands.

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Al isn't replacing jobs but skills. To adapt, we're upgrading our workforce. For example, linguists who used to translate content are now focusing on content quality and creation. In customer service, junior agents are being trained in emotional support and problem-solving to enhance

their roles beyond simple tasks. The goal is to equip employees with diverse skills that AI cannot easily replace.

David Liu Chief Product Officer at Klook



Key Insights were being shared as...(4/4)

6. Move Beyond "Curse Of The Search Box"

- How do you strike the balance between tech and product innovation and the human behavior of consumers – so that all the AI-infused products being rolled out by travel brands are not too far ahead of what consumers are used to?
- Can the industry move beyond the "curse of the search box", where consumers remain tethered to the traditional destination and date search paradigm, hindering the adoption of more advanced recommendation systems?

7. Resource Allocation Quandary

How do you prioritize and develop systems to make strategic choices amidst competing demands and the ever-present threat of competitors gaining an edge? This challenge involves selecting the right systems and processes to focus on, a task that is inherently difficult and fraught with complexity.







Section 2: Workshop

The Thinktank focused on the impact of AI on four main themes

Impacting Customer Behavior with Al in Product Innovation

 Generative AI could significantly transform customer behavior by providing personalized travel recommendations, optimizing booking processes, and enhancing overall service experiences, but the adoption of AI could also introduce challenges such as maintaining user privacy, ensuring ethical data usage, and addressing potential biases in AI-driven recommendations.

Talent in The Age of Al

 Generative AI could enhance the industry's productivity, efficiency, and creativity, but it could also lead to job displacement, skill gap, and talent retention issues.





Empowering the Long Tail with Al

 Generative AI could facilitate the discovery, curation, digitization, training, and feedback of micro service providers, but it could also encounter challenges in data quality, consistency, incentives, and privacy.

Addressing Over Tourism with Al

 Generative AI could help to incentivize adjacent tourism spots, disincentivize poor usage, and use tech to decongest crowded destinations, but it could also raise privacy, bias, and algorithmic issues.



The Thinktank provided us with suggestions on how to move forward in the age of AI

1. Impacting Customer Behavior with AI in Product Innovation

The industry need to take a customer-centric approach that prioritizes seamless UX design, robust data management, and industry-wide collaboration to effectively integrate AI solutions

RECOMMENDATIONS

2. Empowering the Long Tail with AI

The industry should develop standardized protocols for training large language models so that the AI can understand micro service providers's needs and integrate seamlessly with existing technology

IMPLEMENTATION D

3. Talent in The Age of Al

Key
TakeawaysLeveraging AI, upskilling, collaboration, and fair evaluation practices are key to addressing workforce
challenges and creating a sustainable growth that benefits both employees and businesses.

4. Addressing Over Tourism with Al

The tourism industry must balance saying 'no' by limiting visitors to primary destinations and making travelers say 'yes' to alternative destinations, a balance that AI could support.



The industry need to take a customer-centric approach that prioritizes seamless UX design, robust data management, and industry-wide collaboration to effectively integrate AI solutions

Current Situation and Challenges

- Early adoption of AI: Travel companies are beginning to explore and implement AI technologies to enhance customer experiences and streamline operations.
- Fragmented approaches: Different companies are experimenting with various Al applications, such as chatbots, personalized recommendations, and dynamic pricing, but there is a lack of industry-wide standards and best practices.
- Data silos: Travel companies possess vast amounts of customer data, but it often
- remains siloed and unintegrated, hindering the development of comprehensive user profiles and personalized experiences.
- Limited personalization: While some companies offer basic personalization, such as recommending destinations based on past bookings, the level of personalization is still limited due to data challenges and the early stage of Al adoption.

Suggested Next Actions

UX Design Approaches:

To create a seamless and user-friendly AI-powered travel experience, the industry should focus on identifying specific pain points in the customer journey and gradually introducing AI features to address them. Starting small and continuously gathering user feedback will allow for iterative improvements in UX design. Establishing a set of AI UX design principles will ensure consistency and intuitiveness across the industry.

Data Utilization:

The travel industry should prioritize the integration of data from various sources to create comprehensive user profiles that enable personalized experiences. Implementing robust data privacy measures and adhering to regulations will build trust with customers. Continuously refining data models based on user feedback and market trends will unlock valuable insights for targeted marketing, pricing optimization, and enhanced personalization.

Industry Collaboration and Standardization:

 To accelerate the adoption of AI and create a consistent, user-friendly experience across the travel industry, companies should actively collaborate and share knowledge. Engaging with industry associations to define best practices and standards for AI interaction design will ensure a unified approach.
 Partnering with technology vendors and startups will help identify and integrate innovative AI solutions. Working closely with regulators and policymakers will promote the responsible and ethical use of AI, building trust with customers and stakeholders.



(Ref) Additional points discussed about Impacting Customer Behavior with AI in Product Innovation

Challenges **Possibilities:** 1. User Adoption: 1. Enhanced UX Design: Overcoming resistance and educating users on AI features. Intuitive interfaces and gradual feature rollouts. 2. Data Utilization: 2. Data Quality: Ensuring high-quality data for AI functionality. Leveraging and continuously improving data. 3. Standardization Complexity: 3. Standardization in Al: Establishing industry-wide AI interaction standards. Industry-wide standards for consistency and reliability. **Opportunities: Recommendations:** 1. Prototyping and Testing: 1. Customer-Centric Design: Focus on small, valuable improvements from the outset. Starting with defined problems and iterative improvements. 2. Industry Collaboration: 2. Data Integration: Learning from others and encouraging public sector involvement. Continuous improvement of data through user interaction. 3. Incremental Implementation: 3. Establishing Standards: Gradual introduction to enhance adoption. Collaboration for industry-wide AI UX standards.



The industry should develop standardized protocols for training large language models so that the Al can understand micro service provider's needs and integrate seamlessly with existing technology

Current Situation and Challenges

- Limited visibility: Micro service providers struggle to gain visibility and compete with larger players because of their limited resources and smaller scale of operations.
- Discovery and curation: The absence of centralized platforms/format and curated experiences makes it difficult for travelers to discover unique offerings from micro service providers.
- Data quality and consistency: Fragmented systems and limited standardization across platforms make it challenging to ensure accurate and consistent data for

micro service providers.

- **Scalability and sustainability:** Small businesses struggle to digitalize independently due to lack of scale-merit benefits, making it challenging to invest in and sustain digital initiatives without external support.
- Training and support: Providing micro service providers with the specialized knowledge and ongoing learning opportunities to effectively leverage AI requires substantial resources and investment.

Suggested Next Actions

Training Models and Standardized Protocols:

 To provide valuable data to small operators, large technology companies like Microsoft need to develop open protocols for training large language models (LLMs) tailored to the specific needs of the travel industry. These models should be capable of understanding the requirements of small operators, such as hoteliers and transport providers. Establishing new, modern protocols through industry boards or government agencies is crucial for ensuring interoperability and efficiency.

Leveraging Existing Chat Apps/Platforms:

The interface for this technology must be user-friendly and compatible with the chat apps commonly used by operators, such as Line, Kakao, WhatsApp, and WeChat. By leveraging these existing platforms, which operators are already familiar with, the integration of new technology can be more seamless and efficient. Integrating mini-app programs within these platforms could further facilitate this process.

Reallocating Funds from Traditional Advertising to Technology Development:

 Destination marketing organizations (DMOs) should reallocate funds from traditional ads to technology development. Emphasizing community-driven tech generation, local entities should collaborate to adopt technological advancements.

Building Community Involvement for Technological Advancement:

Tourism boards need to build a community reach by engaging with university people, existing venture capital arms, and organizations. They should focus on collaborative efforts to fund and grow technological advancements rather than acting as venture capital businesses themselves.

Implementing Pilot Programs in Tech-Saturated Areas:

Implement pilot programs in tech-saturated areas such as Korea or Japan, where dominant chat platforms can support new technology integration. This approach can foster a community-driven funding model and leverage existing infrastructures, ensuring widespread adoption and effective use of new technologies.



(Ref) Additional Key points discussed about Empowering the Long Tail with AI

Challenges

- 1. Implementation Barriers for Small Hotels:
 - \checkmark Overwhelmed with daily operations.
 - ✓ Complex integration of AI models.

2. Funding and Resource Allocation:

- ✓ Uncertainty over funding sources.
- ✓ Need for adequate support from tourism boards.

3. Standardization and Protocol Development:

✓ Lack of modern standards in the industry.✓ Reliance on outdated systems like GDS.

4. Localized Implementation Issues:

✓ Diverse communication platforms in different regions.

5. Community and Industry Collaboration:

✓ Requires effective collaboration among stakeholders.

Recommendations:

1. Develop Open Protocols:

 Tech companies should create open protocols for training and using AI models.

2. Create Al Interfaces on Chat Platforms:

✓ Develop user-friendly interfaces on popular chat apps.

3. Shift Focus of Tourism Boards:

✓ Invest more in tech solutions and community-based initiatives.

4. Collaborate with Universities and Organizations:

- Partner with academia and existing organizations for tech development.
- ✓ Pilot projects in saturated chat platform areas.



Leveraging AI, upskilling, collaboration, and fair evaluation practices are key to addressing workforce challenges and creating a sustainable growth that benefits both employees and businesses

Current Situation and Challenges

- Skill gap: The tourism workforce lacks AI skills, requiring training programs.
- Job displacement: Al automation may lead to job losses, necessitating role redefinition.
- AI talent retention: Attracting and retaining AI professionals is challenging for the tourism industry.

Suggested Next Actions

Leveraging AI for Workforce Enhancement:

One effective approach to address the workforce challenges is to leverage the power of generative AI (GenAI) to enhance the skills and creativity of the existing workforce. By providing training in areas where AI cannot be fully utilized, employees can develop unique skills that complement AI systems, making the workforce more valuable and creating opportunities for growth and advancement within the industry.

Focus on Prompt Engineering:

Upskilling efforts should emphasize prompt engineering, which involves designing
effective prompts for AI systems to generate desired outputs. This skill is particularly
valuable for creative designers and roles that rely on generating innovative ideas and
solutions. Despite initial trial and error, case studies indicate that the effectiveness and
scalability of this approach are significant.

Collaboration for Comprehensive Training:

 To support upskilling efforts, collaboration between companies and the government is crucial. Increased funding and resources should be allocated to develop comprehensive training programs tailored to the tourism industry's needs.

Collaboration: Effective AI implementation requires collaboration between AI experts and tourism specialists.

 Balancing human touch: Maintaining the right balance between AI efficiency and human interaction rism is crucial.

Attracting Talent from Other Industries:

Another key strategy to address the workforce shortage is to attract talent from non-tourism industries. By creating a welcoming and inclusive environment and offering competitive compensation and benefits packages, the tourism industry can tap into a broader pool of skilled individuals with diverse perspectives and experiences. Targeted recruitment efforts can help achieve this goal.

Using Technology for Fair Evaluation:

The use of technology, particularly GenAI, can help overcome biases in employee evaluation. While developing complex evaluation systems can be challenging, GenAI can assist in creating more objective and fair assessment processes. By leveraging this technology, the industry can create a more transparent and equitable work environment, encouraging employee retention and long-term growth.



(Ref) Additional Key points discussed about Talent In The Age of AI

Challenges

- 1. Integration of AI in Creative Processes:
 - ✓ Requires significant calibration and learning.
 - ✓ Balances AI efficiency with human creativity.

2. Training and Upskilling Workforce:

- ✓ Ensures adequate training in new technologies.
- ✓ Secures funding for comprehensive programs.

3. Reducing Subjectivity in Employee Evaluation:

- ✓ Overcomes biases in traditional systems.
- ✓ Implements fair Al-driven assessments

Opportunities:

- 1. Innovation in Creative Fields:
 - ✓ Invests in Al-unutilized areas.
 - Empowers creative processes with AI tools.

2. Workforce Development:

- ✓ Adapts to technological advancements.
- ✓ Supports training programs with government funding.

Possibilities:

1. Leveraging AI in Creative Industries:

- ✓ Focuses on imagination and scalability.
- ✓ Enhances productivity in design.

2. Enhanced Training and Reskilling Programs:

- ✓ Benefits various sectors with prompt engineering.
- ✓ Improves personnel assignments using AI.

Recommendations:

1. Promote Creativity Beyond Al:

- ✓ Encourages skills complementary to AI.
- ✓ Balances human creativity and efficiency.

2. Enhance Upskilling Initiatives:

- ✓ Provides AI-related training across industries.
- ✓ Establishes comprehensive programs with support.

3. Implement Unbiased Evaluation Systems:

- ✓ Deploys AI-driven assessments.
- ✓ Predicts retention risks and identifies development areas.



The tourism industry must balance saying 'no' by limiting visitors to primary destinations and making travelers say 'yes' to alternative destinations, a balance that AI could support in achieving

Current Situation and Challenges

- Overtourism pressures : Many celebrated tourism destinations are already coping with the negative effects of overtourism, implying congestion, environment degradation, and overburdening the local infrastructure and resources.
- Limited use of AI: While there is growing interest in the potential of AI to help manage overtourism, the actual use of AI in this context is still limited and mostly experimental.

Complex root causes : Overtourism is a multi-faceted issue with complex root causes, such as the growth of global tourism, the popularity of certain destinations, the concentration of visitors in specific areas or during peak seasons, and the lack of effective tourism management strategies. There is often no single solution, including AI, that can address all of these underlying factors.

Suggested Next Actions

Balancing 'No' and 'Yes' Philosophies:

To manage over tourism, the tourism industry must balance 'no' (limiting visitors to primally destinations) and 'yes' (make people to say yes to visiting alternative destinations). This protects sensitive environments, reduces pressure on local resources, and improves the experience for tourists and residents. Al supports this balance by providing data-driven insights and personalized recommendations for sustainable choices.

Dynamic Pricing for Sustainable Tourism Management:

 Al-powered dynamic pricing could effectively manage tourism demand and promotes sustainability. By analyzing data on seasonality, popularity, and realtime demand, destinations can adjust prices for accommodations, attractions, and services. This encourages off-peak travel, longer stays, and visits to less popular attractions, spreading tourism benefits and reducing over tourism impacts.

Implementing AI-Driven Dynamic Tourism Taxes:

 Al could also help implement dynamic tourism taxes, adjusting them based on visitor numbers, stay lengths, and environmental impact. Using Al algorithms on tourism data, destinations can create effective taxation systems, balancing revenue generation with sustainability.

Personalized Recommendations for Alternative Destinations:

 Al-powered trip planning systems can suggest lesser-known destinations based on traveler preferences and past experiences. This helps distribute tourism benefits and reduces pressure on overcrowded hotspots.

Use AI as a Supportive Tool:

 Al should be seen as a supportive tool in the battle against overtourism, not a panacea. While Al-generated insights and recommendations can provide decision-makers with valuable information to adapt to unfolding events and implement more sustainable practices, it is not a standalone solution. Ultimately, it is up to the human's decision making to take the necessary actions and lead the way towards a sustainable future.



(Ref) Additional points discussed about Overtourism with AI

Challenges

- Resistance to Restrictions: Balancing economic benefits with sustainable practices.
- 2. Complexity of Implementation: Coordination among stakeholders and accurate AI integration.
- Dependence on Technology: Risk of overlooking human preferences and investment requirements for robust AI systems.

Possibilities:

- 1. Managing Tourist Flow: Implementing restrictions and using AI to monitor demand.
- 2. Alternative Destinations: Promoting less crowded options with personalized AI-driven recommendations.

Opportunities:

- 1. Dynamic Pricing and Tourist Taxes: Controlling influx and managing visitor numbers effectively.
- 2. Technology Integration: Providing real-time data and suggesting alternative destinations based on preferences.

Recommendations:

- **1. Implement Tourist Restrictions**: Limiting tourists and hotel constructions to preserve quality experiences.
- 2. Promote Alternative Destinations: Encouraging visits to less crowded locations.
- 3. Utilize AI for Demand Management: Analyzing tourist demand and providing personalized recommendations.





Conclusion: Imagine The Future

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Travel will enter the AI Agent Era. Each individual will have a personal AI agent who understands my preferences, private information, interests and tastes.

I would not be surprised that my AI agent will go to the AI travel agent to discuss the next vacation plan and give me the options to pick and choose and will recommend the least carbon footprint option.

I don't have enough knowledge to think about the environmental impacts by the travel options, but the AI agent can do for me.

For this to happen, travel needs to develop industry-wide AI-to-AI communication protocols that could help integrate fragmented travel data silos, enabling AI agents to collaborate seamlessly.

Atsushi Tarai Co-founder, TheEdge Of





The possibilities are endless, the challenges immense, and the rewards real.







JAPAN & NORTH ASIA

WiT Japan & North Asia is the Tokyo-based edition of the Web in Travel (WiT) conference first launched in Singapore in 2005. It was launched in Tokyo with co-founders, Kei Shibata and Aya Aso, in 2012 to act as a bridge between Japan & North Asia and the rest of the world to unearth and share the latest innovations and trends happening in travel technology, distribution and marketing in one of the world's most dynamic and biggest travel markets.

Its objective is to showcase the dynamism and diversity of the Japanese & North Asia travel startup ecosystem, as well as the trends, issues and opportunities within the online travel market. For global travel brands, it will be an opportunity to learn about an exciting growth region as well as form relationships and build partnerships for the future.



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