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# **Sales promotion as strategy and tactic among small independent retailers**

Theses of Doctoral Dissertation

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# **Sales promotion as strategy and tactic among small independent retailers**

**(Investigation among small independent retailers and consumers  
on the market of over clothes)**

## **Placing the theme in national and international researches**

In the 21st century integrated marketing communication is dominant that means a harmonized adoption of different promotional tools for convincing customers with the most effective methods possible (Józsa et al. 2005, p. 286.). The general trend is that companies spend more money on BTL (below the line communication) and sales promotion (SP, promotion, deal) than on advertising (above the line communication). The international literature concerning sales promotion is very rich since a lot of books (Cummins and Mullin 2002, Blattberg and Neslin 1990, Schultz et al. 1998) were published on how traders and manufacturers can design effective campaigns. Most of the studies concentrating on fast moving consumer goods (FMCG) and investigating the planning and implementing stages of sales promotion techniques aimed at consumers and initiated by manufacturers or retailers. Another popular direction of sales promotion literature is the investigation of customer behavior namely how consumers respond to deals and what kind of factors influence their attitude in the cognitive, affective and conative phases (Laroche et al. 2001 and 2003). Investigating the demand side it can be said that GfK Hungarian Research Institute regularly conducts representative researches focusing on the response to deals. Analyzing the supply side there are Hungarian researches, mainly Józsa and his coauthors (2005, 2006, 2007), who investigated the sales promotion the integrated marketing communication strategy of independent clothing and shoe retailers. Generally it can be ascertained that only a few studies aimed at the analysis of SP techniques in a higher involvement product category and there is not such a comprehensive study that would analyze the problem from the demand and the supply side at the same time.

## **The aim of the dissertation and timeliness**

The aim of my dissertation is on the one hand is to analyze the sales promotion strategy and tactic of small independent retailers<sup>1</sup> specialized on the selling of overclothes in Transdanubia and in Budapest and on the other hand the identification of preferred sales promotion techniques and factors influencing deal proneness. In an

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<sup>1</sup> According to Smith and Sparks (2000) small independent retailers are retailers with between one and five outlets and less than ten employees.

empirical research I wanted to point at such connections how the change of external environment affects the promotional budget and the importance of sales promotion, and how retailers following different strategies can be characterized based on their sales promotion tactics and how successful and unsuccessful companies can be characterized. As Schultz and his coauthors (1998) emphasize that a successful SP plan does not exist without the knowledge of customers that is why I considered investigating customers important. I analyzed what type of sales promotion methods are preferred by customers in case of purchasing of over-clothes, the hedonic and utilitarian benefits of incentives whether purchasing over-clothes is characteristic of consumers and finally the demographic and psychographic traits of deal-prone shoppers.

The timeliness of the research can be explained by the economic recession since Sándor (2006) emphasizes that stagnant economies reinforce researches focusing on sales promotion. At the same time investigating small independent retailers is also important because of the economic and the competitive environment. 17% of all retailers and 26% of all non-food retailers are clothing and shoe shops. Relying on the data of the Central Statistical Office (CSO) and reports of marketing research institutes the number of small independent shops are decreasing from year to year, but multinational companies become popular because of their favorable prices and constant deals. The process of concentration is the highest in this sector and smaller clothing shops can maintain their position in villages or rural areas. Under such circumstances the question arises how important the retailers consider sales promotion techniques in their marketing program, whether they use incentives in order to convince customers and how consumers respond to deals.

### **The structure of the thesis**

The thesis is divided into eight parts. I have summarized the most important national and international literature in three chapters. Then I introduced the steps of my empirical research from planning till data analysis from the fifth chapter.

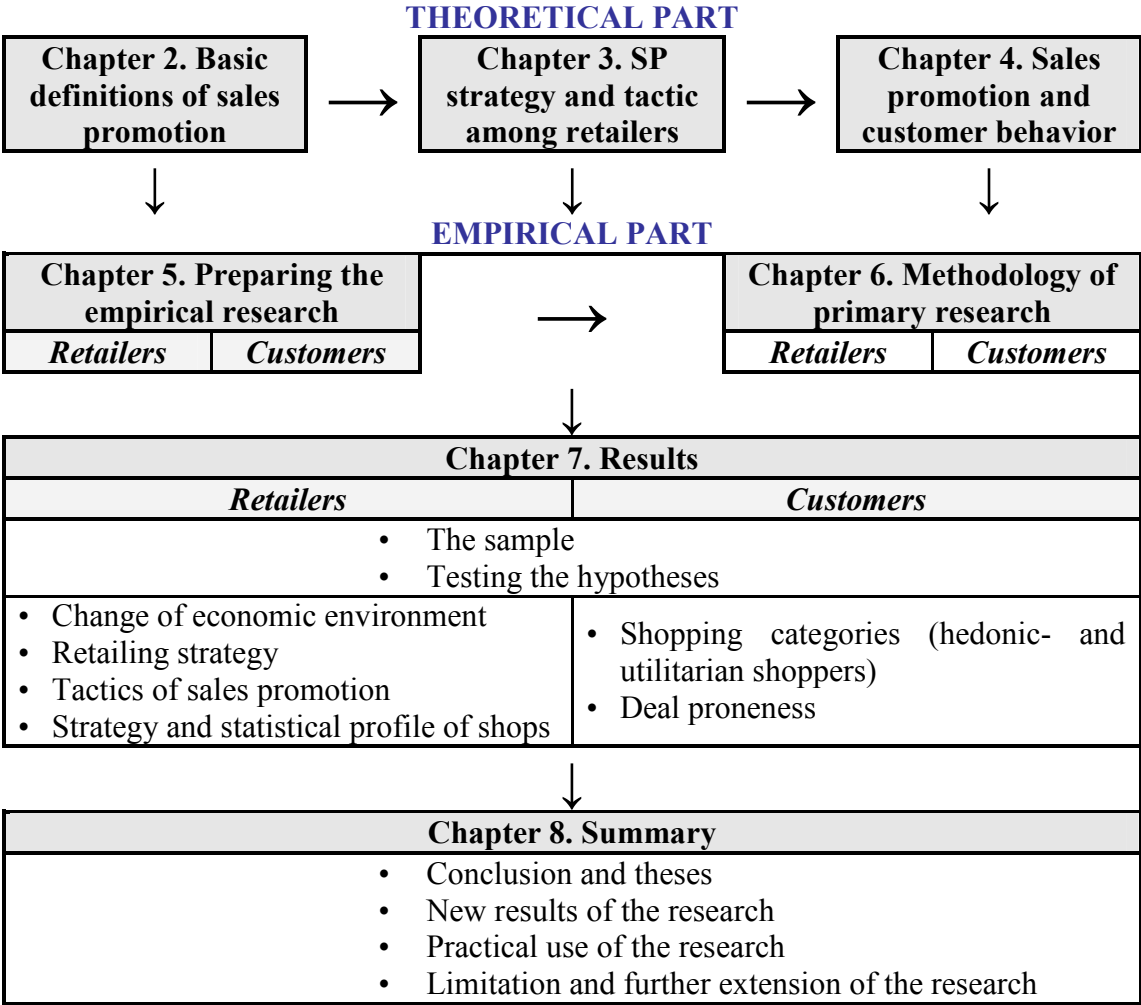
In the theoretical part first I summarized the definition of sales promotion and “push” and “pull” strategies focusing on consumer SP methods concretely the types, the

objectives, the advantages and disadvantages and the possible classification of these incentives. In the third chapter I analyzed the importance of strategic thinking. The three main stages of “planning – implementation – controlling” are necessary for a successful marketing and marketing communication strategy. When companies think of sales promotion as a strategic tool in order to achieve long term aims they rely on their strategy and organizational objectives. Since the marketing strategy of retailers is specific I summarized those researches that aimed at revealing these peculiarities and exploring the competitive advantages of “small retailers” comparing with “large ones”. After this overview I summarized theories connected to SP strategy in chronological order. I dealt with the process of planning a sales promotion strategy emphasizing such tactical questions as the suggested forms and types of sales promotion techniques. I used the data base of EBSCO and Science Direct to find empirical researches in relationship with sales promotion strategies of retailers. Only a few former researches focused on the analysis of sales promotion strategy of independent small retailers. In the fourth chapter I highlighted the connection between sales promotion and consumer behavior because it is important to understand the process till customers decide to buy promoted products. Among the psychological factors influencing the purchasing process learning and attitude is determining in the process of purchase. I introduced such national and international researches that aimed at the classification of customers based on their attitude towards sales and factors influencing the three elements (cognitive, affective and conative) of attitude. Relying on the previously mentioned scientific databases I gave an overview about the researches connected to deal proneness, which aim at exploring the demographics and psychographics of customers who can be influenced by various offers. At the end of this chapter I summarized Hungarian researches connected to this topic. All in all it can be said that most of the former studies investigated FMCG or packaged products and deal proneness in that product category.

In the fifth chapter I detailed the steps of my empirical research separately to the retailers and separately to the customers. I defined the research questions and hypotheses related to the scientific problems. In the sixth chapter I introduced the methodology of my empirical research. In case of customers the research started with a

qualitative investigation in the exploratory phase. In case of retailers I did not consider qualitative research necessary since I partially repeated a former research of my supervisor. In this part of my dissertation I concerned with measurements and structures of the two types of questionnaires. I detailed the methods of sampling and defining the size of the sample and the circumstances of field work and data collection. In the seventh chapter I tested my hypotheses with the help of different univariate and multivariate techniques. In case of customer research I conducted two post focus groups in order to control the validity of the quantitative research. In the last chapter I defined the main consequences and my theses. I referred to the novel and the practical importance results of my research and suggested some ideas that managers should follow in order to be competitive in the 21<sup>st</sup> century. Finally I wrote about the limitation and the possible future extension of my research (figure 1).

**FIGURE 1 FRAMEWORK OF THE DISSERTATION**



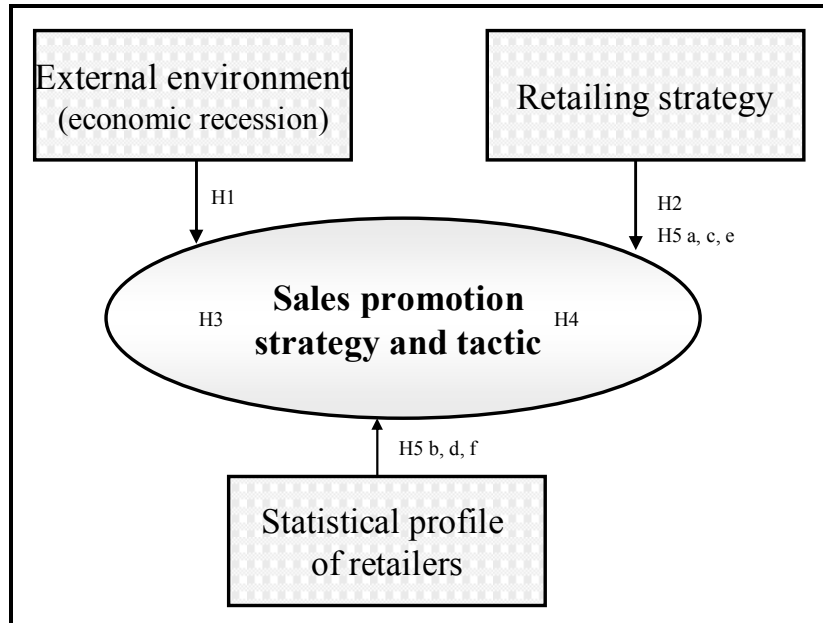
Source: Own construction

## Hypotheses

### Hypotheses related to independent small shops

Considering the demand side I formulated five groups of hypotheses based on the theoretical background (figure 2).

**FIGURE 2 THE FRAMEWORK OF HYPOTHESES RELATED TO THE SALES PROMOTION ACTIVITY OF INDEPENDENT SMALL RETAILERS**



Source: Own construction

### *Hypothesis related to environmental uncertainty*

According to Sándor (2006) and Fam and Yang (2006) when the external environment becomes uncertain, small independent retailers prefer to spend more money on in-store promotions and sales promotion rather than on outdoor promotions.

**H1a:** The economic uncertainty inclines independent small clothes shops to put more emphasize on sales promotion in their marketing program and promotional budget.

**H1b:** Due to the economic uncertainty small clothes retailers experience a decline in their sales and the number of customers and an increase in the price-sensitivity of customers, which means that managers spend less on advertising and more on sales promotion.

### ***Hypotheses related to retailing strategy***

Clothes shops can be distinguished into different groups based on the priorities of their partial strategies namely considering their applied product-, brand-, price policy and services and physical evidence (Levy and Weitz 2004). Thus the group of exclusive shops offers internationally branded products (over-clothes) with high quality at prestige price and puts more emphasize on the physical environment of the shop, personal selling and individual requirements. On the other hand the group of discounts offers private label or not branded over-clothes with average or below the average quality at low price and does not consider the physical environment, personal selling and individual requirements important. Relying on cluster-membership clothes retailers use different sales promotion techniques.

**H2a:** Exclusive shops prefer value added sales promotion techniques such as gifts, contests and sweepstakes and loyalty programs.

**H2b:** Discount stores mainly use sales promotion techniques offering financial benefits like discounts, seasonal sales, coupons and BOGOF<sup>2</sup> incentives.

According to Fam and his coauthors (2006) successful retailers prefer personal selling and in-store promotions, so these communication techniques are the most popular among them and they spend the highest amount of money on those solutions. According to Józsa and Tárkányi (2005) successful and unsuccessful retailers consider SP important to boost sales.

**H2c:** Retailers considering their marketing strategy successful place more emphasis on sales promotion in their promotional expenditure than less successful shops.

**H2d:** Retailers are more successful if they apply SP for achieving strategic (long-term) aims.

### ***Hypotheses related to sales promotion tactics***

Many authors highlighted that small entrepreneurs are not aware of marketing science, and they often identify marketing as a tactic of selling and advertising (Marcati 2008). Small retailers are not aware of their possibilities. In Hungary Józsa (2004) came to

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<sup>2</sup> Buy one get one free incentives or indirect financial allowances.



the conclusion that short-term thinking is a typical behavior for small enterprises, and these organizations miss the use of marketing as a strategy and define their aims based on their former experiences.

**H3:** Retailers determine their budget for sales promotion arbitrary regardless the aims.

According to Józsa and Tárkányi (2005) small shoe and clothing shops apply seasonal sales to boost sales and remove the stock.

**H4a:** Discounts (price-offs) and seasonal sales are the most popular sales promotion techniques among retailers and they apply these methods most often.

**H4b:** Retailers use sales promotion techniques for achieving short-term aims, i.e. prompt increase sales, which is possible through financial solutions.

**H4c:** In case of long-term goals, e. g. image building or retaining loyal customers, shop-owners choose value added promotions.

***Hypothesis related to the connection between a sales promotion strategy and the statistical profile of shops***

Based on the retailing strategy and the statistical profile (date and place of operation, number of employees, and the number of managed shops) there are significant differences among the tactical elements of the sales promotion strategy of retailers.

**H5a:** Discount stores offer incentives in longer periods of time than exclusive shops.

**H5b:** Shops operating in towns that were established formerly with fewer employees guarantee incentives in a shorter period of time than stores established in the 21<sup>st</sup> century, employing more employees and operating in the capital city.

**H5c:** Discount stores offer incentives in a higher degree than exclusive shops.

**H5d:** Shops operating in towns that were established formerly with fewer employees guarantee incentives in a lower degree than stores established in the 21<sup>st</sup> century, employing more employees and operating in the capital city.

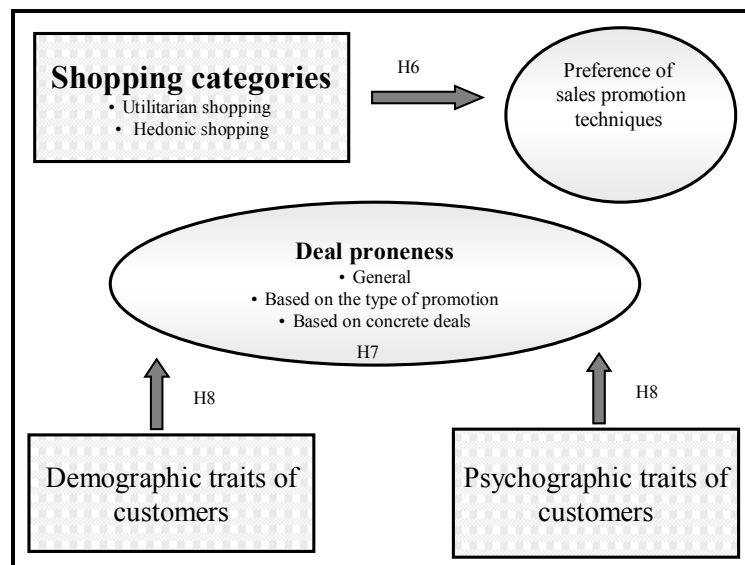
**H5e:** Discount stores do not consider ATL support and the outdoor information of customers of sales promotion campaigns important.

**H5f:** Shops operating in towns that were established formerly with fewer employees do not consider ATL support and the outdoor information of customers of sales promotion campaigns important.

### Hypotheses related to customers

Regarding customers I defined three hypotheses connected to shopping categories and deal proneness (figure 3).

**FIGURE 3 THE FRAMEWORK OF HYPOTHESES RELATED TO CUSTOMERS**



Source: Own construction

#### *Hypothesis related to shopping category*

There are different shopping categories based on the benefits of shopping namely utilitarian and hedonic purchasing (Töröcsik 2007). In case of utilitarian shopping customers are rational and they consider the activity as fulfilling an obligation. In case of hedonic shopping emotional elements come in foreground and customers consider shopping as a form of entertainment and relaxation when they can forget about their problems (Babin et al. 1994). According to Chandon and his coauthors (2000) sales promotion techniques offer different *economic* (saving money, access to a product of higher quality and time of search) and *hedonic benefits* (pride, adventure of exploring, entertainment) for customers.

**H6:** Utilitarian shoppers prefer financial promotions solely, while hedonic shoppers prefer value added promotions, too.

### ***Hypotheses related to deal proneness***

*Lichtenstein and his coauthors* (1995) showed that deal proneness should be examined at three different levels: (1) generally, (2) based on certain type of deals, (3) based on concrete techniques.

**H7a:** Customers can be distinguished into three different groups based on deal-proneness. One group of customers like using many different sales promotion methods and one group of customers like only price promotions. However there are customers, who only like certain deals.

Relying on the results of GfK Hungarian Research Institute Hungarian people like price promotion techniques, especially direct and indirect financial allowances.

**H7b:** Customers are prone to price promotions namely to discounts and BOGOF incentives in case of purchasing over-clothes.

More international researches (*Lichtenstein et al.* 1997, *Vyas* 2005, *Martínez és Montaner* 2006) aimed at exploring the demographic and psychographic factors of deal prone customers.

**H8a:** Non brand loyal females are generally prone to sales promotion techniques.

**H8b:** Young and middle-aged price- and value-conscious women living in towns, who consider purchasing clothes as an important decision and plan their shopping trip, are prone to financial deals.

**H8c:** Coupons are preferred by higher educated young people living in financial wellness and in towns, who are not brand or store loyal.

**H8d:** Loyalty programs are preferred by prestige sensitive, fashion follower store and brand loyal customers.

### **Methodology**

I chose the *quantitative* method of the primary research that aims at the statistical generalization of mass marketing phenomena (*Veres et al.* 2006). In the exploratory phase of my research I questioned 16 customers, 7 males and 9 females belonging to different age groups and family life-cycle. I also conducted two paired interview with

a young couple and a middle aged couple since the personal interviews highlighted that purchasing over-clothes is a family program and women have a decisive role in the process of the purchase. I finalized my hypotheses related to customers and specified the sampling and the questionnaire based on the results of depth interviewing. In case of retailers I repeated the former research of Józsa with a minor change since he focused on the integrated marketing communication activity of retailers while I concentrated on sales promotion.

**Table 1 Summary of the methodological characteristics of the surveys**

<b>ASPECTS</b>	<b>RETAILERS</b>	<b>CUSTOMERS</b>
<b>Method of data collection</b>	100% personal survey	100% survey (self-fulfilled questionnaires)
<b>Applying interviewer</b>	65% with the help of interviewers, 35% own survey	Interviewers were applied in forwarding the questionnaires.
<b>Geographical area of the research</b>	Western Pannon region Central Pannon region Budapest	Western Pannon region Central Pannon region Budapest
<b>Aim of the research</b>	Analysis the sales promotion strategy and tactic of small independent retailers	Analysis of customer behavior in case of the purchase of over-clothes
<b>Time of the research</b>	April and May 2009	April and May 2009 Research in Budapest June 2009
<b>Respondents</b>	Small independent retailers specialized on selling over-clothes, where the number of employees is less than 10	People over 17 who regularly purchase over-clothes
<b>Method of sampling</b>	non-probability, quota sampling	snowball sampling
<b>Number of questions</b>	32	24
<b>Number of valid questionnaire</b>	216	419
<b>Number of invalid questionnaire</b>	15	19
<b>Method of data analysis</b>	SPSS software	SPSS software
<b>Average length of the survey</b>	15 minutes	15 minutes
<b>Response rate</b>	58.9%	65.46%
<b>Clarity of questions</b>	There was no problem with the clarity in case of both surveys.	

Source: Based on Szakál, Z. (2008) A tokaji borvidék borkülönlegességeinek marketing szempontú elemzése

In case of retailers I chose quota sampling within non-probability sampling and I determined regional quotas. I mainly focused on the Western Pannon region. In case of customers I combined quota sampling with snowball sampling. I basically focused on the young and middle-aged generation since the qualitative research and the literature suggested that this group of people is considered to be the heavy users of over-clothes (Goldsmith et al. 1999, Central Statistical Office). In order to collect primary data I aggregated two short questionnaires and the survey was about 15 minutes long. The surveys were conducted in the following counties Győr-Moson-Sopron, Vas, Zala, Komárom-Esztergom, Veszprém and Fejér and in the capital city in April and May 2009. The circumstances of quantitative research are summarized in the table 1.

## **Measurement**

The standard questionnaires contained close-ended questions measured on metric and non-metric scales. In the questionnaire aimed at retailers I used itemized rating scales within non-comparative techniques. I applied five point Likert scales and nominal scales measuring the statistical profile of shops. In the questionnaire aimed at customers I used itemized rating scales within non-comparative techniques. I used forced rating scales namely balanced scales<sup>3</sup> to avoid neutral answers. I applied scales developed and validated by former researches. I used scales developed by Babin et al. (1994) to differentiate utilitarian and hedonic shoppers. I applied scales introduced by Chandon and his coauthors to measure the *utilitarian* and *hedonic* benefits of sales promotion techniques. I determined *deal proneness* with a graphic model (circle). Respondents had to evaluate how many promoted over-clothes they bought in a year, and the ratio of this quantity within all purchase. Proneness to concrete deals was measured on graphic rating scales with the endpoints few and many. Among psychographic traits I relied on multi-item scales developed by Sproles and Kendall (1986), Sproles and Sproles, Lichtenstein et al. (1993) and by Feick and Price (1987). I applied the following scales: fashion involvement, price perception scales measuring sale proneness, price and value consciousness and prestige sensitivity, market maven, quality consciousness, impulsivity, loyalty and confused by overchoice. Relying on the

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<sup>3</sup> Favorable and unfavorable aspects are used in the same ratio.

results of our qualitative research and the pilot study I decreased the items involved in each psychographic trait to shorten the questionnaire.

## **Data analysis**

The data analysis was accomplished with SPSS statistical software. In order to test my hypothesis I used one-way analyses (frequency distribution) and multivariate techniques, especially cross tabulation, ANOVA, factor analysis and clustering and multiple regression. The reliability and validity of confirmatory factor analysis was tested with Cronbach's  $\alpha$  method and with Amos 5.0 statistical software to reveal the values of CFI and RMSEA. I visualized the relationships between variables graphically. In case of multivariate techniques I took into consideration the conditions, namely the relevance of each method and homoscedasticity and normality. In case of factor analysis the multicollienarity between variables and the homogeneity of the sample was considered. In case of cluster analysis I discarded outstanding values. In case of cross tabulation I considered that the expected value is over 5 in 80% of the cells. In case of analysis of variance I investigated normality, homogeneity of variance and the results of Levene-tests. In case of linear regression I took into consideration the linear connection between the dependent and the independent variables, and the normal distribution and homoscedasticity of residuum. I considered the level of significance 0.05 in case of every statistical method.

## **Results**

Relying on the results of data analysis I defined the following theses.

**T1a:** The economic recession leads retailers to put more emphasis on sales promotion in their marketing communication activity and their promotional budget.

**T1b:** Small independent retailers, the number of customers of whose decreased and became price-sensitive due to the economic crisis, apply sales promotion techniques more often.

**T2a:** Exclusive shops apply sale promotion techniques variably and they use the traditional forms of SP together with value added sales promotion techniques such as coupons, refunds, gifts, anniversary sales and loyalty programs.

**T2b:** Discount stores mainly use classic sales promotion techniques offering financial benefits like discounts, seasonal sales, coupons and BOGOF incentives.

**T2c:** Retailers are more successful considering their marketing strategy and achieving the aim of sales promotion campaigns if they apply SP for strategic and tactic (long-term and short-term) aims.

**T3:** Discounts (price-offs) and winter and summer sales are the most popular sales promotion techniques among retailers and they apply these methods most often.

**T4a:** Retailers use sales promotion techniques for achieving short-term aims, i.e. prompt increase of sales, which is possible through financial solutions.

**T4b:** The modern types of sales promotion methods such as coupons and anniversary sales are used for achieving long-term goals, e. g. image building or retaining loyal customers.

**T5a:** Retailers guaranteeing anniversary sales for a longer time manage more shops.

**T5b:** Shops operating in the capital city guarantee spring sales in a longer period of time, but guarantee autumn sales in a shorter period of time than stores operating in towns.

**T5c:** Shops operating in towns and employing fewer employees guarantee incentives at a lower degree than stores employing more employees and operating in the capital city in case of contests and sweepstakes and BOGOF incentives.

**T5d:** Exclusive stores consider the ATL support (printed media, local TV and internet) and the outdoor information (direct mails DM) of customers of sales promotion campaigns important.

**T5e:** Shops operating in the capital city and employing more employees consider the ATL support (local media) and the outdoor information (DM and flyers) of customers of sales promotion campaigns important.

**H5f:** Shops operating in towns that were established formerly with fewer employees guarantee incentives in lower degree than stores established in the 21<sup>st</sup> century, employing more employees and operating in the capital city.

**T6:** Utilitarian shoppers prefer financial promotions solely, but hedonic shoppers prefer value added promotions, too.

**T7a:** Customers can be distinguished into three different groups based on deal-proneness. One group of customers like using many different sales promotion methods and one group of customers like only price promotions. However there are customers, who only like certain deals especially price-offs and seasonal sales.

**T7b:** Customers are prone to price promotions namely to discounts and BOGOF incentives in case of purchasing over-clothes.

## **Conclusion**

The dissertation resulted in more *novel results* due to the investigation of the supply and the demand side and the application of qualitative and quantitative research methods.

Relying on the *supply side* it can be said that the majority of independent small clothes shops do not use sales promotion techniques variably. Exclusive shops apply a wide range of SP methods because this type of stores offers coupons, refunds and gifts. Exclusive shops consider deals as strategic tools but discount stores consider special offers as tactical instruments. Retailers can achieve long term goals with the use of modern types of price promotions that is not the classic discounts but with the use of coupons or anniversary sales. Exclusive shops operating in the capital city offer more valuable prizes in case of contests and sweepstakes and gifts than discount stores.

Relying on the *demand side* it can be said that Hungarian customers assign higher hedonic benefits to price promotions (discounts, coupons, BOGOF incentives) than customers living in more developed western countries where SP methods have been used for a longer time. Hedonic shoppers prefer the different types of SP instruments than utilitarian or purposive customers. Deal proneness should be investigated at three levels (1) generally, (2) based on the type of promotion and (3) based on concrete deals. Young females, who are hedonic shoppers, respond to many different deals in case of purchasing over-clothes. If someone lives in a larger family and is market maven that is well informed about seasonal sales and shares the information with



others respond to many different deals. Value added promotions are favored by fashion followers who have primary school education. Poorly prone customers are loyal and interested in fashion and trends. People highly prone to sales promotion techniques offering economic benefits are involved in fashion and market maven. Applying contests and sweepstakes are not really used among small independent clothes shops. Prestige sensitive, quality conscious market maven people like this type of SP and respond to it if they have the chance. Coupons are used by young and hedonic shoppers who live in larger families and care about fashion and uniqueness and have profound information about deals. BOGOF incentives are used by sale-prone, price- and value-conscious shoppers who consider the opinion of others important and think that their clothing reflects their social status. Influencing customers by gifts is not popular among small independent shops however hedonic, non loyal and impulsive customers would appreciate this way of convincing them to purchase over-clothes.

### **Limitation and possible future extension**

In the research I made a few assumptions therefore I have to mention the *limitation* of my empirical research:

- Results can be generalized only at regional level. The majority of both samples (retailers and customers) were form the Western part of Hungary.
- The data of the empirical research were collected from the most developed region of Hungary, where the sector of retailing is the most developed and customer spend the highest amount of money on clothing.
- The survey concentrated on one sector namely retailers selling over-clothes for women, men and children.
- The survey was conducted in the spring of 2009 when retailers could hardly experience the effects of economic recession.
- The study did not regard the commerce across the borders however this phenomenon is extremely important in the Western Pannon region. Many Hungarian customers travel to Austria to purchase over-clothes in the nearby outlets and many customers come to Hungary from the neighboring Slovakia.

- The research focused on independent clothing shops and customers purchasing promoted over-clothes. Underwear, sport clothes and shoes were not taken into consideration in the consumer research.
- The research aimed at customers did not take the attitude towards sales into consideration in case of purchasing over-clothes as a gift.
- I did not use diary panels in measuring deal proneness.

The possible *future extension* of my research:

- Extending the survey and investigating less developed regions in Hungary or other emerging countries belonging to Eastern Europe in order to see the differences and similarities among retailers and customers.
- Repeating the empirical research in 2010 to get a clearer picture about the effects of the economic recession / uncertainty.
- Collecting data from other sectors and products categories such as shoes, drugs electronic household goods or cars should be collected.
- Extending the research to services since in the sectors of tourism and banking special offers have come in the foreground to the economic downturn.
- Analyzing customer behavior and the process of decision making. The theoretical model of Blattberg and Neslin (1990) should be tested empirically.
- Interpreting the response hierarchy models like Lariche et al. (2001 and 2003). It would be useful to explore the stages of development of consumers till they decide to purchase promotes over-clothes and factors influencing each stage.
- In the future the research should be completed with diary panels to get more reliable results considering deal proneness. A panel of people in different stages of family life cycle should be formulated who make a note of the circumstances of purchasing over-clothes (what, at what price, to whom and how) at a certain period of time.

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