ECE customer survey with 90,000 respondents

How customers in Europe use shopping centers

Usage profiles, drivers of value, and relevance to the brick-and-mortar retail sector



Foreword

Dear Reader,

Data, statistics, and analytics are indispensable when making many of today's business decisions – especially in a world that is changing ever more rapidly.

For complex, highly frequented, and management-heavy properties like shopping centers, data and analytics are essential for measuring their performance and making informed decisions about their ongoing development. As a leading shopping center operator and landlord, ECE Marketplaces therefore has its own department that conducts and evaluates location-based and cross-market competitive analyses, market research, customer surveys, research studies, and data analyses, enabling ECE to create a data-driven decision-making basis for owners and tenants as well as for its own business activities.

This white paper constitutes part of this work. It is based on the latest ECE customer survey, which, with around 90,000 personal interviews in eight European countries, is one of the largest consumer studies in Europe. The customer survey provides empirical insights into shopping behavior, customer loyalty, and the everyday use of shopping centers. It also highlights their importance to the retail sector and the provision of daily essentials as well as their role as places where people spend time and meet others. The better we understand our customers, the better we can work with owners and tenants to tailor the shopping center as a product to their needs. I hope you find this report interesting and insightful.

Joanna Fisher
CEO, ECE Marketplaces

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1 Key insights

With 90,000 interviews conducted in eight countries, the ECE customer survey is one of the largest on-site surveys of shopping center customers in Europe. It gives the real estate industry a broad empirical basis and boasts exceptional market coverage.

Shopping centers are an integral part of daily life – even in view of the increasing competition from online retailers.

1. **High relevance of brick-and-mortar stores:** Around 60 percent of respondents prefer **shopping in-store**. (see Chapter 3.2, p. 10).
2. **High proportion of regular customers:** Around 63 percent of respondents are regular customers in ECE centers (see Chapter 3.4 / Fig. 4, p. 14).
3. **High level of customer satisfaction in ECE centers:** Around 70 percent of visitors rate their center as "good" or "very good" – the average grade is 2.3 (see Chap. 3.1 / Fig. 1, p. 10).

Accordingly, rather than being mutually exclusive, online retailers and brick-and-mortar stores actually complement each other: Digital channels primarily facilitate transactions and the search for information, while shopping centers impress people with instant availability, personal advice, service, shopping experiences, and quality of stay.

High conversion rate of 85 percent: Frequency generates sales, purchasing power influences the transaction value

1. **Visitor frequency leads to purchases:**
   Particularly relevant to management, leasing, and investment considerations is the insight that 85 percent of all visitors make a purchase during their stay (see Chap. 3.3 / Table 4, p. 12). This high **conversion rate** shows that visitor frequency directly contributes to sales.

2. **Propensity to buy remains stable across income groups:**
   The propensity to buy remains remarkably stable across various income groups. This suggests that purchasing power has less of an impact on purchasing decisions than the average transaction value (see Chap. 3.3 / Table 4, p. 12).

Various success factors for shopping centers: location, function, usage profile, and customer structure

One key takeaway is that there is no single success model for shopping centers. That's because the KPIs vary significantly across individual locations.
The location and function of the center in the catchment area and the structure of its target groups shape both its usage logic and KPIs such as dwell time, proportion of regular customers, purchase conversion rate, and average transaction value:

- Out-of-town centers are of particular relevance for clothes shopping and as shopping destinations. They are characterized by a long dwell time and high average transaction value.
- Neighborhood centers tend to have a higher proportion of regular customers and are places where people go for their daily necessities.
- Urban centers are for everyday use, while also serving as places where people like to spend time and are seeking an experience. They generally have high footfall.

Individual KPIs should therefore always be interpreted in the context of the respective property's function (see Chap. 3.7 / Table 10, p. 17). Location strategies and the tenant mix should be individually based on the location, function, and usage logic of the respective location. The key factors for investment valuation are therefore not so much the KPIs in isolation as the ability of a location to fulfill its role as a solid local port of call for daily necessities, an urban center with high footfall, or regional shopping destination in the given setting.

The defining factors are the cultural and social context

Different forms of use are also evident in European comparisons. In Germany and Austria, usage is more functional and geared toward everyday needs, while in Italy and Turkey there is a greater focus on the actual stay, the food courts, and the center's social function. In the Czech Republic, daily necessities and the quality of stay are closely linked, while Poland and Hungary have their own usage patterns that are more geared toward basic needs.

Daily necessities generate footfall; food courts and fashion extend the dwell time and increase the size of shopping baskets

The analysis also shows that shopping centers serve different needs simultaneously. Groceries and drugstore products generate regular day-to-day footfall by accounting for 53 percent of purchases, while clothing, shoes, and accessories continue to play a key role in the dwell time and larger shopping baskets with a figure of 50 percent. (see Chap. 3.3 / Table 5, p. 13). Food courts also contribute to the quality of stay and boost combination purchases. The economic performance of a center is thus the result of a wide range of usage occasions and is not solely attributable to individual anchor tenants.

Gen Z is among the regular customers in ECE centers

The results of the survey also send a positive signal in terms of future viability, with Gen Z continuing to use shopping centers on a regular basis. The proportion of regular customers in this age group is at the same level of respondents overall. Although the average transaction value for this target group is lower, its members play a key role in breathing life into the centers through their frequent visits, use of the food courts, clothing purchases, and social activities (see Chap. 3.5 / Table 8, p. 15). Shopping centers thus remain relevant to younger target groups – but more as hybrid places between consumption, leisure, and social meeting places.

High-intensity use: Families use every aspect of shopping centers

Family households make comprehensive use of shopping centers. Households with children do not necessarily visit centers more often than other visitor groups, but they do use them more intensively, with a longer dwell time, higher average transaction value, and broader spending structure (see Chap. 3.6 / Table 9, p. 16). Families thus serve as a particularly attractive target group for centers because they combine their need for daily necessities with more general shopping and leisure activities.

2 The 2025 ECE customer survey: scope and methodology

The results are based on the 2025 ECE customer survey. Over a total of 509 days, almost 90,000 customers were surveyed across 119 centers in eight countries. The surveys were mostly conducted between early September and mid-December 2025, covering a large proportion of the centers managed by ECE Marketplaces. Customers aged 16 and over who had already completed their visit to the center were randomly selected and surveyed.

90,000 respondents from eight countries	
Germany – 57,643 respondents (87 centers)	Hungary – 5,052 respondents (5 centers)
Turkey – 8,243 respondents (9 centers)	Austria – 3,397 respondents (4 centers)
Poland – 8,132 respondents (8 centers)	Italy – 2,118 respondents (3 centers)
Czech Republic – 1,666 respondents (2 centers)	Denmark – 911 respondents (1 center)

Table 1: Respondents by country

The survey included 24 standard questions as well as center-specific supplementary questions. Key aspects of the center visit were recorded – including visitor profile, visit frequency, shopping behavior, satisfaction, and catchment area. The survey thus made it possible to conduct cross-portfolio assessments and perform differentiated analyses by target group, location, and usage pattern.

Overview			
Social demographics	Center location	Catchment area	Capture rates
Visit frequency	Shopping behavior	Dwell time	Average transaction value
Satisfaction	Media use	Voucher	Supplementary questions

Table 2: Key areas covered in the ECE customer survey

ECE has been conducting comparable surveys since 2016, initially annually. Since 2022, it has been done for all centers on a mandatory basis every three years. If specific issues are identified, individual aspects are explored in greater depth. This creates a consistent data basis for time comparisons, location analyses, and strategic derivations.

3 A focus on Germany: customer profile and usage logic for ECE centers

The following assessments relate to Germany. They are based on surveys in 87 German ECE centers and thus cover over 95 percent of the German ECE portfolio.
This high coverage of the ECE portfolio provides a reliable picture of the customer structure in the German ECE centers.

Customer aspect	ECE customers	DE population Ø	
Ø Age	43 years	45 years	Our center customers represent a broad cross section of the population. **Plus:** High proportion of families and slightly above-average purchasing power.
Proportion of women	Approx. 59%	Approx. 51%	
Ø Household size	Approx. 2.3 people	Approx. 2.0 people	
Net income > €3,500	13%	11%	
Households with children	Approx. 35%	29%	

Table 3: ECE customer aspects compared in Germany

As broad retail and real estate formats, shopping centers appeal to different sections of the population. Accordingly, the profile of center customers largely resembles the population average. At the same time, there are some differences: The figure for women, larger households, and families is above average; center customers are on average somewhat younger and have slightly above-average purchasing power.

3.1 Satisfaction and ECE center ratings

The ECE centers are rated positively by most visitors. Around 70 percent of respondents rate the center in question as "good" or "very good"; the average rating is 2.3 (ECE overall: 2.1) on a scale ranging from 1 ("very good") to 6 ("unsatisfactory"). Overall, this yields a positive image of the centers from the customer's perspective.

How satisfied are you with the center overall? (Grade)

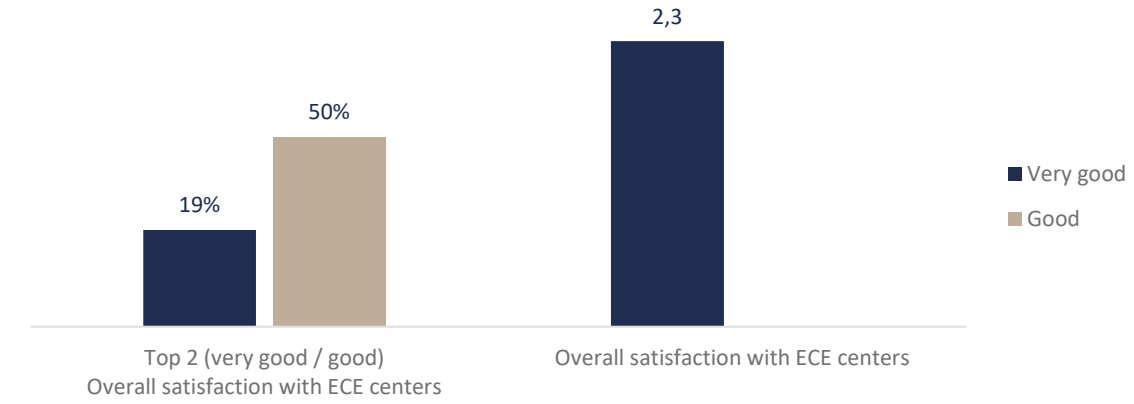

Figure 1: Customer satisfaction with ECE centers

3.2 Relevance of brick-and-mortar stores stable since 2019

The ECE customer survey reveals a stable preference for brick-and-mortar shopping. In 2025, around 60 percent of center customers surveyed preferred shopping in-store, bringing the figure back to the level of 2019, the last customer survey before the pandemic.

What is your attitude to online shopping?

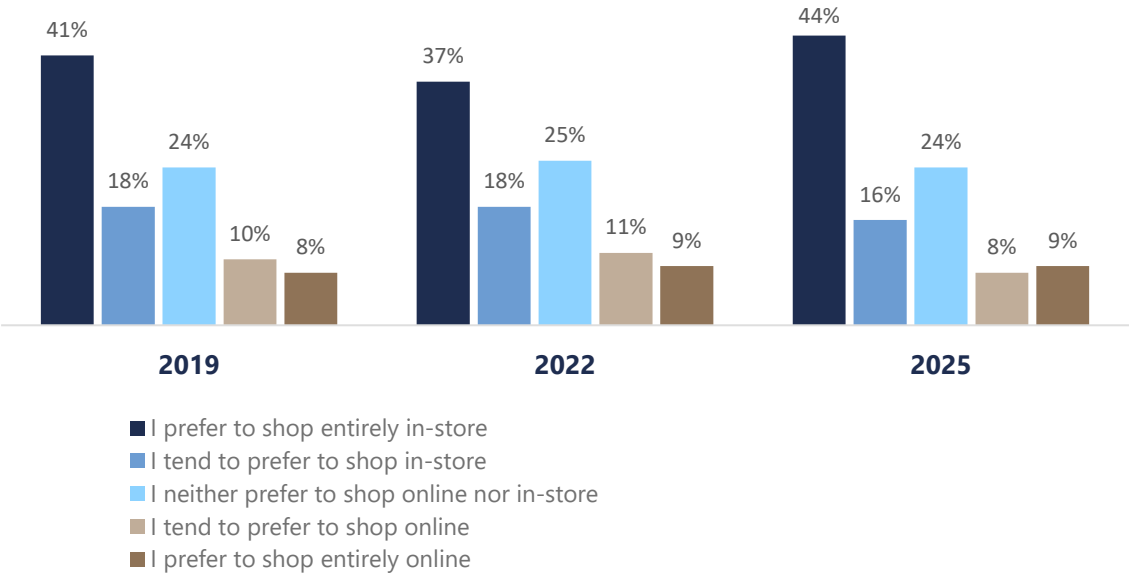

Figure 2: Customer attitudes to online shopping

In addition, the ECE Online Tracker – regularly conducted market research involving a survey panel – also reveals a normalization of channel preferences after the significant shifts seen

during the coronavirus years. Since 2022, values have stabilized at a new level. There has been no shift away from brick-and-mortar stores either among customers on-site or among respondents on the online panel. No comparable time series data is available for the other ECE countries.

Brick-and-mortar retail has returned to its pre-pandemic level

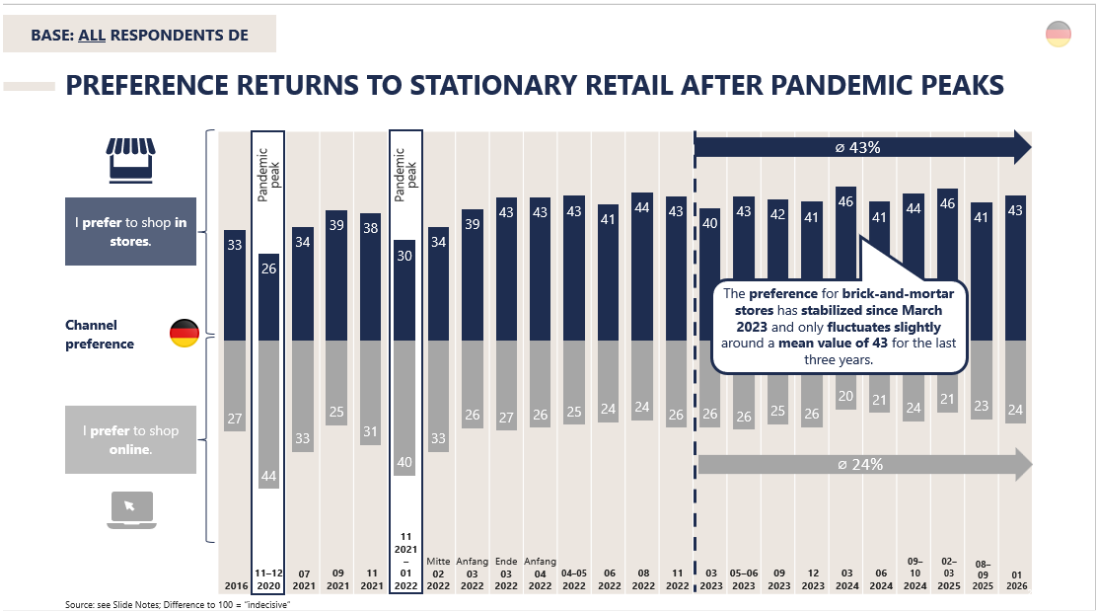

Figure 3: A long-term comparison of channel preference (so-called Online Tracker)

The customer survey and Online Tracker reveal that online retailers and shopping centers complement each other but serve different functions. Online channels primarily support information searches and transactions. Shopping centers, meanwhile, are preferred for their everyday necessities, instant product availability, service, and quality of stay.

3.3 From footfall to sales: spending rate, average transaction value, and product categories

Shopping centers encourage spending through a wide range of usage occasions, with 85 percent of visitors spending money during their visit to the center. The center visit is thus not only relevant in terms of footfall, but also from a spending perspective.

Income mainly influences the average transaction value, less so the spending rate
An analysis by net household income reveals that the likelihood of spending money during a center visit remains comparatively stable across income classes. The spending rate is therefore not limited to individual groups with purchasing power. The income effect is more evident in the spending level than in the spending rate: As net household income rises, so does the average transaction value.

Net household income	Spending rate / percentage spending	Average transaction value
< €1,000	85%	€51
€1,000 to below €1,500	89%	€63
€1,500 to below €2,500	87%	€78
€2,500 to below €3,500	88%	€92
€3,500 to below €5,000	88%	€113
€5,000 and above	88%	€142
Total	**85%**	**€77**

Table 4: Income, spending rate, and average transaction value by NHI

Note on methodology: The average transaction value shown in the table is based on information provided by respondents aged 16 and over after completing the center visit. It should be viewed as a survey-based spending indicator rather than calculated sales per center visitor. It is not possible to determine center sales from these figures because spending may also be household-related and only respondents who are spending money are considered.

The spending rate is influenced more by behavior than by income

When it comes to the spending rate, behavioral factors are more important than sociodemographic aspects. The dwell time, specific purpose of the visit, and the type of visit especially play a role in determining whether or not money is spent during the center visit. Income, meanwhile, accounts not so much for the basic likelihood of making a purchase as for the average transaction value.

Product categories reveal differing usage logic

Two product categories inform the spending structure particularly clearly, with clothing, shoes, and accessories as well as groceries and drugstore products each purchased by roughly every other visitor. Clothing thus remains a relevant part of the center visit; groceries and drugstore products also play a part in regular footfall and everyday use.

In which categories have you spent your money? (Multiple answers possible)	
Clothing, shoes, accessories	50%
Groceries and drugstore products	53%
Food and drink	31%
Services, e.g., key cutting, hairdresser, nail studio	6%
Entertainment and leisure activities, e.g., movie theater, bowling, arcade	4%
None of the above categories	4%

Table 5: Spending by product category

The correlation analyses support these relationships, with longer stays mainly associated with spending on clothing, shoes, and accessories as well as food and drink, while groceries and drugstore purchases tend to be associated with shorter, functional visits. Clothing and food and drink feature together more often, while clothing and groceries / drugstore products feature much less frequently.

The following table classifies these product categories by visit context, center function, and strategic importance.

Usage pattern / product category	Typical visit context	Function in the center	Value contribution / strategic importance
Groceries and drugstore products	Short, regular, more functional visits	Everyday necessities and solid footfall generator	Generates regular footfall, with returning customers and local relevance
Clothing, shoes, and accessories	Browsing, specific purchases, longer stays	Factor in improving consumption and image	Encourages larger shopping baskets and longer stays, boosts the center's appeal as a shopping destination, and benefits from combined visits to the food court
Food court	Complements the shopping experience, social meeting place for a break during the visit	Longer stays and enhanced experience	Extends the visit, supports combined purchases with clothing, and boosts center loyalty
Services	Everyday errands, often in addition to other uses	Convenience and routine	Supports the integration of the center into everyday life, but generally has only a limited impact on the individual spend
Entertainment and leisure	On certain occasions, less commonly routine visits	Contributes to the experience and differentiation strategy	Enhances quality of stay and image, but is highly dependent on location and target group

Table 6: Product category logic in the context of usage

3.4 Regular customers: proximity, routine, and stable footfall

Regular customers are those who visit a shopping center at least every 14 days. In the survey, around 63 percent of visitors belong to this group. Regular customers thus constitute a central basis for regular use of the center.

The following diagram shows the breakdown of respondents into regular customers (visiting at least every 14 days) and less frequent visitors.

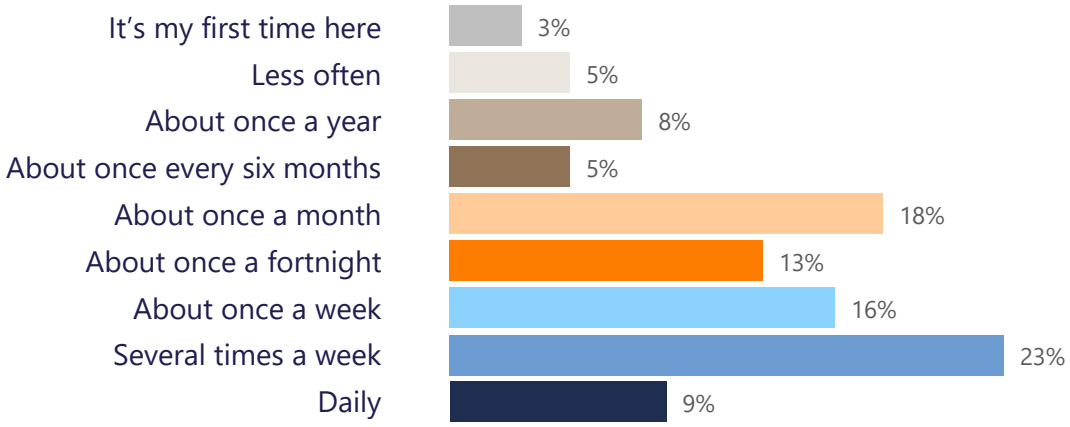

Figure 4: Visit frequency in ECE centers

A regular customer base is generated through everyday practicality

It is primarily everyday practicality that determines the regular customer base: Proximity, accessibility, and the combination of regular errands with other uses make the center an integral part of recurring journeys. The high proportion of regular customers is thus less an indicator of occasion-specific use and more a sign of the functional anchoring of the center in the everyday lives of its customers.

This logic is also reflected in the KPIs and their correlations, with regular local customers paying frequent visits more geared toward shopping for daily necessities. They spend less time in the center per visit and spend less money on average than infrequent visitors, but they do come more often – especially for recurring routines like grocery shopping. Less frequent visitors, meanwhile, tend to stay longer and have higher individual spends, especially on clothing, shoes, and accessories as well as food and drink.

Physical proximity plays a key role for regular customers, with 73 percent stating that the center is close to where they live – compared to 43 percent for infrequent visitors.

KPI	Regular customer (at least every 14 days)	Infrequent customer	Δ
Ø Dwell time	69 min.	82 min.	–13 min.
Ø Average transaction value	€65	€98	–€33
Proportion with grocery shop	61%	39%	+22 pp
Walk to the center	23%	7%	+16 pp

Table 7: Regular customer vs infrequent customer – a KPI comparison

3.5 A comparison of age groups: spotlight on Gen Z

Gen Z is often described as a target group with a strong online focus. However, the age-related analysis from the 2025 customer survey reveals that this assessment misses the mark when it comes to the use of shopping centers.

At around 64 percent, the proportion of regular customers among Gen Z is at the same level as the overall sample. Young visitors thus use shopping centers regularly rather than only occasionally or on certain occasions. This suggests that younger target groups continue to incorporate shopping centers into their daily lives and leisure activities.

Gen Z differs from older target groups in economic terms, with a shorter dwell time and lower average transaction value. By visiting the centers, taking advantage of the food and drink options, purchasing clothes, and using the centers for socializing, they also contribute to the overall performance.

KPI	Gen Z (16–29)	30–59 years	60 plus	Total	Categorization
Proportion of regular customers (at least once/fortnight)	64%	58%	70%	63%	Proportion of regular customers among Gen Z level with overall figure
Ø Average transaction value	€62	€94	€71	€77	Gen Z has lower average transaction value
Clothing purchases	49%	55%	43%	50%	Proportion buying clothes close to overall average
Food court visits	33%	32%	27%	31%	Above-average demand for food and drink among Gen Z
Grocery and drugstore purchases	51%	52%	58%	53%	60+ age group more focused on daily necessities

Table 8: A comparison of age groups – selected KPIs and categorization

3.6 Households with children: daily mainstay with intense use

Households with children account for 34 percent of all visitor households, representing a key user group of the shopping centers.

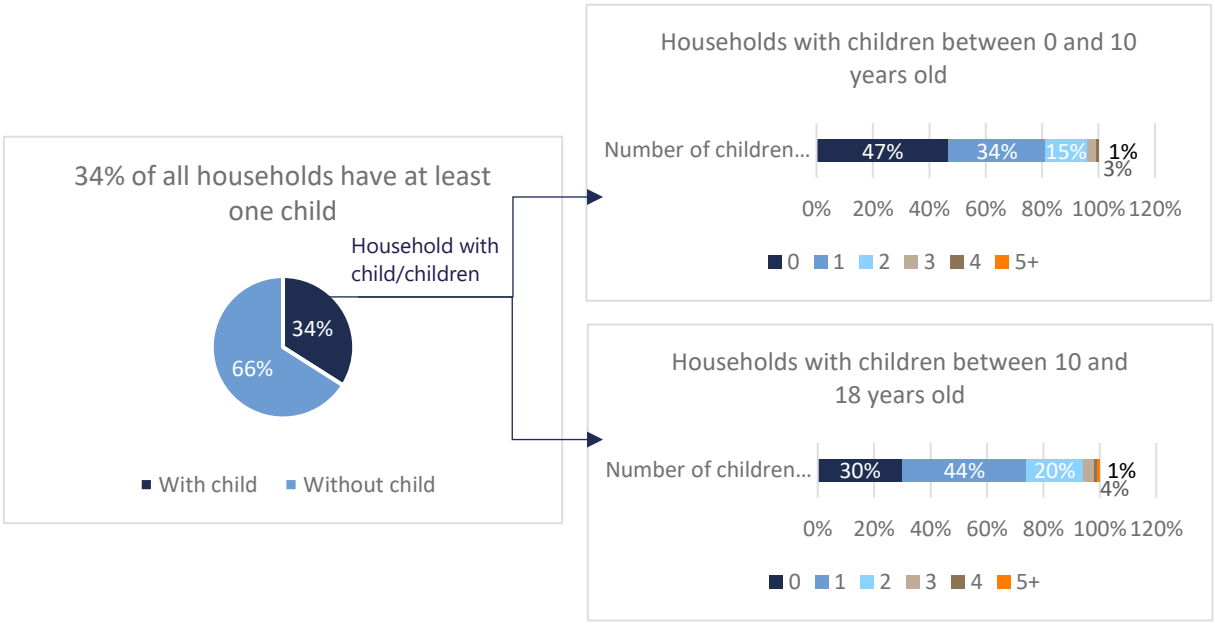

Figure 5: Households with children

At 63 percent, the proportion of regular customers among households with children is exactly the same as the overall level. These households therefore do not visit centers more often than households without children, but use them more intensively, staying longer (81 minutes compared to 70 minutes) and spending more per visit (average transaction value: 84 euros against 74 euros).

KPI	With children	Without children	Δ / Categorization
Ø Age	32 years	49 years	Much younger
Ø Dwell time	81 min.	70 min.	+11 min.
Average transaction value	€84	€74	€+10
Proportion of regular customers	63%	63%	No difference
Clothing and shoes	55%	47%	+8 pp
Food court	34%	30%	+4 pp
Only groceries and drugstore products	22%	28%	Fewer single purchases

Table 9: Households with children – selected KPIs

Family households exemplify how shopping centers combine daily necessities and consumption in everyday life, while also serving as places where people spend time.

3.7 KPI ranges: Why there is no such thing as "the" shopping center

The ranges of the main KPIs highlight the fact that there is no such thing as "the one shopping center."
Age, household structure, mobility, dwell time, and spend sometimes vary significantly between locations and reflect different location qualities, catchment areas, and tenant mixes. While some centers are strongly geared toward everyday life and necessities, with a high proportion of regular customers and short, efficient visits, others serve more as shopping destinations. People spend longer here, average transaction values are higher, and there is a greater focus on clothing.

KPI	Mean value	Range	Significance / influencing factors
Age	43 years	29–58 years	Population in catchment area and offering
Proportion of women	59%	48–73%	Population in catchment area and offering
Households with children	34%	14–57%	Population in catchment area and offering
Proportion of customers in cars	44%	10–91%	Center location (urban vs out-of-town center)
Proportion of regular customers	63%	22–94%	Center location (urban, tourist location vs close to home)
Dwell time	74 min.	35–135 min.	Type of visit (browsing or passing through)
Proportion of buyers	85%	62–99%	Center type (neighborhood / passing through or destination)
Average transaction value	€77	€31–177	Center type (neighborhood / passing through or destination)
Clothing purchases	50%	14–77%	Center type (neighborhood / passing through or destination)

Table 10: KPI ranges in the customer survey

The ranges show that KPIs should not be viewed as quality judgments, but rather reflect location, function, and tenant mix.

3.8 Center location: How it influences the target group mix and usage pattern

The location determines the usage logic

The center location clearly informs the target group mix, the reason why people visit, and the economic logic of a center. Out-of-town centers, urban centers, and neighborhood centers fulfill different roles: Their functions range from destinations for shopping and leisure activities to places for daily necessities. KPIs such as dwell time, average transaction value, spending rate, and proportion of regular customers should therefore not be assessed in isolation, but rather in the context of the respective center location.

These KPI differences are also reflected in product categories and visit reasons: While out-of-town centers have a particularly strong focus on clothing purchases and serve as destinations, neighborhood centers are more geared toward meeting people's daily needs. Urban centers are for everyday use, while also serving as places where people like to spend time and are seeking an experience.

Usage focus	Out-of-town	Urban	Neighborhood
Clothing and shoes	67%	49%	48%
Groceries and drugstore products	41%	52%	57%
Only specific purchases	48%	40%	44%
Browsing and experience	29%	33%	28%

Table 11: Usage focus by center location

The differences first become apparent in the key performance indicators:
Out-of-town centers have the highest transaction values and the longest dwell times, while neighborhood centers have the highest proportion of regular customers. Urban centers fall in between the two in many of the KPIs, with various stages of a journey a distinct feature.

KPI	Out-of-town	Urban	Neighborhood
Ø Dwell time	106 min.	71 min.	74 min.
Ø Average transaction value	€139	€74	€70
Spending rate	93%	84%	88%
Regular customers (at least once a fortnight)	42%	62%	69%

Table 12: KPI profile by center location

Different strategic roles can be derived from the KPI profile and usage focuses.

Center type	Primary role in the market	Usage logic	Economic logic	Strategic model
Out-of-town center	Leisure and shopping destination	Planned, longer visits, "self-contained" use	Higher spend per visit, low everyday loyalty	Destination-focused visit
Urban center	Urban visit and experience format	Fragmented use as part of various journeys around the city	Value contribution through footfall and relevance, lower individual spend	Integrated use within the city
Neighborhood center	Mainstay for everyday necessities	Regular, short to medium-length stays	High proportion of regular customers, moderate spend	Everyday needs

Table 13: Strategic roles of center locations

Three conclusions can be drawn from this: Firstly, there is no such thing as "the" shopping center; center locations each follow a different economic logic. Secondly, high spends and strong customer loyalty are different value drivers, each of them valid. Thirdly, the tenant mix, quality of stay, and profile of the offering must be developed in a way that is typical of the center.

4 A comparison of ECE usage patterns across countries

The 2025 ECE customer survey was conducted in eight countries. For the purpose of providing a comparative overview of the countries, however, only the seven markets for which there is a sufficiently broad survey base are presented separately. Denmark remains part of the overall survey but is not presented individually in the country profile because only one center here was included in the survey.

The overview shows how demographic structure, dwell time, and usage logic differ depending on the market. It combines the main KPIs with a qualitative categorization, laying the foundation for the subsequent interpretation of the differences between the countries.

Country	Ø Age	House-holds with children	Proportion of regular customers	Ø Dwell time	Usage logic / qualitative categorization
Germany	43.3 years	34%	63%	74 min.	Functional and geared toward everyday needs; broad product category, high importance of specific targeted purchases and errands.
Austria	45.3 years	37%	62%	89 min.	Similar basic logic to Germany; functional usage with high everyday relevance.
Italy	40.5 years	37%	56%	96 min.	Stronger focus on clothing, leisure, and food and drink; shopping centers more often serve as places to socialize.
Czech Republic	37.2 years	43%	53%	79 min.	Hybrid use covering daily necessities, experience, and a place where people spend time; comparatively high proportion of families.
Hungary	41.7 years	27%	65%	78 min.	Usage more focused on basic needs; groceries, drugstore products, and complementary uses inform the role of the center.
Poland	35.3 years	39%	65%	85 min.	Younger visitor structure; everyday use, where grocery and drugstore purchases play an important role.
Turkey	33.9 years	47%	65%	125 min.	Youngest visitor structure and highest proportion of families; usage strongly geared toward socializing, leisure, and food and drink.

Table 14: ECE demographics and usage patterns by country

When categorizing the country results, it should be remembered that the survey has limited coverage outside Germany and that the centers surveyed here are more often located in metropolitan areas and larger cities. Accordingly, the values can only be directly compared with the results for Germany to a limited extent, although the fundamental trends relating to demographics, dwell time, and usage focus remain informative.

Two key patterns emerge in the comparison of countries: On the one hand, the age structure, proportion of families, and dwell time differ significantly between the markets. On the other, these differences are concomitant with various center roles: from more functional everyday use to a stronger focus on the time spent there, social encounters, clothing, leisure, and food and drink.

Germany and Austria use the centers for more functional purposes and everyday needs. Italy and Turkey are more strongly focused on the time spent in the centers, the food and drink offerings, and social use, while in the Czech Republic, there is a clear link between daily necessities and quality of stay. National differences should therefore not be viewed as deviations from a uniform model, but rather as expressions of different market environments, demographic structures, and usage cultures.

Imprint

About ECE Marketplaces

With a portfolio of around 200 managed retail properties and activities in eleven countries, ECE Marketplaces is a leading service provider in Europe for the management of shopping centers. ECE has extensive expertise and more than 60 years of experience in the operation, leasing, and marketing of shopping centers and their continuous development into vibrant marketplaces and sustainable service centers.

As a full-service provider, ECE Marketplaces offers international shopping center owners – such as stock and investment companies, pension funds, insurance companies, and family offices – all services from a single source, either individually or as a complete package, including asset and property management, leasing, mall marketing, center and facility management, financing, design, and construction services, and innovative ESG solutions for the sustainable transformation of assets. In addition, ECE operates around 70 parking garages at center locations throughout Europe and provides numerous parking and mobility services.

ECE Marketplaces can draw on the commitment of its roughly 2,900 employees and their extensive expertise as operators and developers of complex commercial properties, along with the knowledge and perspective of the Otto family as owner and investor. In total, ECE manages retail assets worth 28 billion euros, comprising over 17,000 stores and seven million square meters of leasable space, attracting 3.4 million visitors every day.

Find out more at: www.ece.com

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