U. S. Hotels and Social Media: Objectives, Reporting, Measurement and Results Submitted by

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Abstract

Lodging Industry applications of social media continue to evolve; this study reports on a survey to understand Organizational Reporting, Resources, Goals and Objectives, Demographics, Activities, Return on Investment and Trends and Outlook related to hotel Location, Hotel Size, Supply Segment, Affiliation/Management Structure. Findings include that 20 percent of hotels have two or more full time social media employee equivalents, 85 percent of hotel social media programs are managed at the property level, the most important goals of social media are to increase room reservations and guest satisfaction, for 23 percent of hotels ROI on social media programs is estimated, and there are significant differences among hotel attributes for many social media activities, including the percent of total room nights generated.

Introduction

It is a challenge to identify all of the current and emerging providers and applications of social media for the lodging industry. Social media has become an important source of information for travelers in making travel decisions and sharing their experiences, a core activity for lodging marketing executives for individual and aggregate targeted marketing and guest relations programs, for planners and designers to access large amounts of data about guest likes and dislikes including for use in capital expenditures planning, for brand managers to compare satisfaction and guest response to brand initiatives, and for lenders and investors as a form of due diligence, among others.

There has been some excellent research about social media and the lodging industry (Blal and Sturman 2014; Wilson, Murphy, and Fierro 2012). There are emerging practices and trends about organizational reporting of the social media function, outsourcing, measurement of demand and revenue generation and budgeting for social media programs; it seems to be an appropriate time for an update of past research and some new topics to be explored. This research reveals some findings not explored in prior research and that represent the evolution of social media for hotels.

Literature Review

Much of the published social media literature related to hospitality and in particular the lodging sector has focused primarily on a single social media platform at a time such as online travel reviews (Anderson 2012; Levy, Duan, and Boo 2013; Park and Allen 2013), social

networking (Hsu 2012; Wolfe, Phillips, and Asperin 2014), or micro-blogs (Lee 2011) and blogs (Banyai and Havitz 2013). Emergent research has begun to investigate traveler photo and video sharing (Lim, Chung, and Weaver 2012; Wilson, Murphy, and Fierro 2012). Additional hospitality research has focused on consumers' use of social media for information search (McCarthy, Stock, and Verma 2010), formation of consumer perceptions and motivations (Browning, So, and Sparks 2013; Munar and Jacobsen 2014) and in consumer travel purchase decisions (Racherla, Connolly, and Christodoulidou 2013; Sparks, Perkins, and Buckley, 2013). Still other reports have discussed the internal management of social media in hospitality (Bokunewicz 2014; Lanz 2010; Needles and Thompson 2012).

Across industries, managers debate the challenges and metrics appropriate to use in measuring the return on investment (ROI) of social media activities (Applebaum 2001; Fisher 2009; Hoffman and Fodor 2010; Kumar and Mirchandani 2012; Smits and Neijens 2011). The literature about social media has been evolving and recent studies have begun to show that a singular type of social media, usually user-generated content on social review sites, had influence on the pricing power of hotels (Anderson 2013) or in driving referrals for additional profits in food and beverage outlets (Karson and Murphy 2013). However, as the hospitality and travel sector increasingly invests more capital into social media expenditures, the management imperative to measure and track the return on this investment has intensified. Today, the discussion has shifted to not if social media generates revenue but how much it generates.

This exploratory study investigated how social commerce, defined by Marsden and Chaney (2013) as using social media to sell products and services, is currently being measured in the lodging industry. There is a paucity of studies that demonstrate the current practices of measuring social commerce in the lodging industry and in particular individual hotel operators'

expectations and management practices that quantify revenue and financial benefits of social commerce. As noted by Noone, McGuire, and Rohlfs (2011) future research should seek to determine the relationship between social media and key lodging operating metrics.

The hotel industry metrics of room nights sold (occupancy percentage) as a measure of sales volume, average daily rate (ADR), have long been established as appropriate metrics upon which to compare the management and financial success of a particular hotel to another property's performance. To generate room reservations at the maximum possible price, hoteliers engage in multiple marketing efforts including brand affiliation, advertising, public relations, merchandising, and direct sales through sales personnel. In 2013 these marketing efforts consumed an estimated 5.6 percent to 7.0 percent on average of a US hotel's generated sales for independent and chain-affiliated properties, respectively (STR Analytics 2014) these figures represent a 3.6% increase over same store marketing expenditures in 2012 (STR Analytics 2014). These figures do not include the 1.1% cost-to-sales for the U.S. franchise fees that incorporates brand-related activities which subsume brand-level social media expenses. U.S. hotels are expected to spend 20% of the over \$1 billion social media advertising budgets in 2015 (Powell, 2014). The increasing need for managing and understanding the revenue generated from social media is evident and increasingly called for by marketing researchers and industry practitioners alike (Finley-Bajak 2012; Peters, Chen, Kaplan, Ognibeni, and Pauwels 2013; Trainor 2014; Wilcox and Kyung 2013). Subsequently, the present study sought to benchmark the current management practices and measures of social commerce in the U.S. lodging sector.

Sample and Data Collection

An invitation to participate in the research study was sent to hotel property managers by mail to 52,932 individual addresses provided by Smith Travel Research's (STR), a leading global provider of information to the hotel industry, Census Database in spring 2014. To respond, hoteliers could choose from a Quick Response (QR) code or web link to an electronic survey developed in Qualtrics software to participate by April 15, 2014. A total of 121 mailings were returned undeliverable; 693 individuals responded and 519 answered all questions for a 74.9% completion rate and an overall 1.3% response rate. As an incentive, participating hoteliers were offered a copy of the study's results, with an opt-in link collecting addresses separately from the anonymous survey link.

Drawn from the literature, six different forms of social media were identified: 1) guest review sites, 2) social networks, 3) location-based media (geo-social), 4) blogs, 5) microblogs, and 6) media sharing and various objectives and metrics were adapted for hotel-level managers (de Rosario, Rodriguez, and Carmen 2013; Huang 2012, Peters et al. 2013, Marsden and Chaney 2013). Data were gathered about management practices, organizational financial objectives, revenue and strategic expectations regarding each social media category. Nominal scales were used to determine various management responsibilities (General Manager, Director of Sales and Marketing, Director of Revenue Management, Director of Front Desk, or Other with text capture of other) and outsourcing entities (Third Party Manager, Corporate or Brand Manager, Property Manager, Do Not Participate). Data relative to the targeted demographic cohort (Gen Y, Gen X, Boomer, and Silent generations) of each social media category were collected. In addition the importance of eight traditional marketing objectives for a hotel's social media initiatives were measured using a five-point Likert-type scale with anchors of *not at all important* at 1 and

extremely important at 5. A number of statements regarding the context of social media's use in hotel marketing activities were posited for respondents' level of agreement using a 5-point Likert-type scale with anchors of *strongly disagree* at 1 to *strongly agree at 5*. An open-ended question collected thoughts on social media activities in lodging from the hoteliers surveyed.

The survey was vetted by senior lodging marketers prior to being piloted with members of the Hospitality Sales and Marketing Association International (HSMAI) industry group.

Subsequent changes to wording of objectives as well as to scale descriptions were made to improve face validity.

Method

Statistical techniques employed to analyze the data collected were performed using statistical software IBM's Statistical Package for the Social Sciences (SPSS) version 21. Hotels identified by name were coded into the appropriate chain scale as defined by Smith Travel Research 2014 Chain Scale (Economy, Extended Stay, Midscale, Upper Midscale, Upscale, Upper Upscale or Luxury class).

Data Analysis and Results

The findings are presented with the aggregate answers to the questions in the survey instrument, with selected additional findings related to brand and property attributes of:

- Location (Urban, Suburban, Airport, Resort, Highway/Interstate and Small Town/Metro)
- Hotel Size (Less than 50 rooms, 50 to 100 rooms, 101 to 200 rooms, More than 200 rooms)
- Supply Segment ("Full Service", including the Smith Travel Research promulgated
 Chain Scale Segments of Luxury and Upper Upscale, "Upscale and Midscale", including

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the Smith Travel Research promulgated Chain Scale Segments of Upscale, Upper Midscale and Midscale, and "Economy", Economy loas promulgated by Smith Travel Research)

- Affiliation/Management Structure (Franchised Brand, Managed Brand and Independent – for Franchised and Managed Brands, this was based on the most common structure for a brand)

Significance references are at p = 0.05.

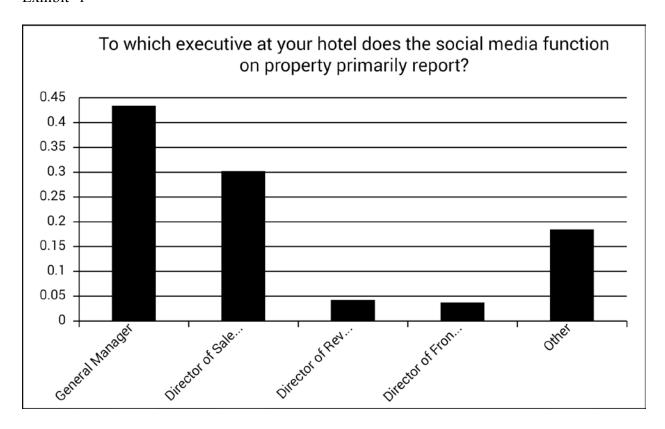
The research reveals some findings not explored in prior research and others that represent evolution of social media for hotels, and includes what may be some surprising findings about the objectives, use, effects and attitudes related to social media for hotels by hotel executives. The analysis and results are several topics:

- 1. Organizational Reporting
- 2. Resources
- 3. Goals and Objectives
- 4. Demographics
- 5. Activities
- 6. Return on Investment
- 7. Trends and Outlook

Results and Discussion

As shown in Exhibit 1, for 43 percent of respondents, the social function reports to the General Manager, and for 30 percent of respondents, it reports to the Director of Sales and Marketing.

Exhibit 1



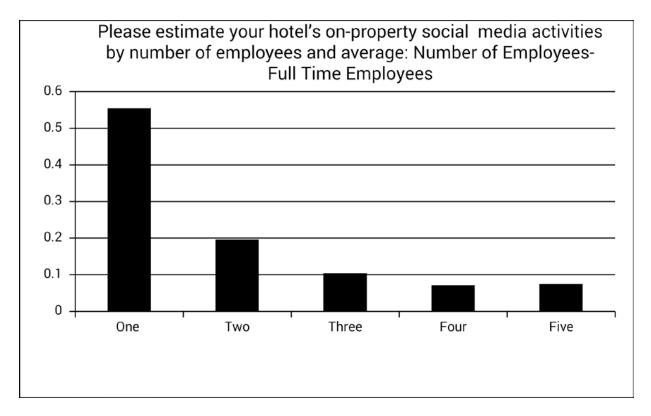
There are significant differences in reporting based on size of hotel at p =.01 with more reporting to the General Manager for smaller hotels and more reporting to the Director of Sales and Marketing for larger hotels. There are also significant differences in reporting based on location with more frequent reporting to the Director of Sales and Marketing for Urban and Resort hotels. The highest frequency of reporting to the General Manager is for Highway/Interstate (68 percent), Airport (64 percent) and Small Town/Metro (57 percent).

Significant differences are also based on supply segment, with the highest frequency of reporting to the General Manager for Economy, Upscale and Midscale and the lowest for Full Service.

There are significant differences at p = .01 in the reporting based on location with more frequent social media function between Franchised and Managed hotels: for 63 percent of Franchised hotels the social media function reports to the General Manager, but for Managed hotels only 24 percent report to the General Manager; for Managed hotels, 46 percent the reporting is to the director of sales and Marketing and 24 percent to Other. These results are significant at p = .01.

The answers indicate that for smaller hotels, which may be more likely to be franchised than managed, in the Economy, Midscale and Upscale segments than Full Service, and in locations other than Urban, the social media function most frequently reports to the General Manager, and for larger hotels, the social media function more frequently reports to the Director of Sales and Marketing or others. This is logical with larger hotels having more management positions and potentially more defined demand segments (such as Groups).

Exhibit 2



Most hotels, 55 percent have approximately one full time employee equivalent; 20 percent have two and 10 percent have three full time employee equivalents. The differences among hotel attributes are significant, with some surprising results.

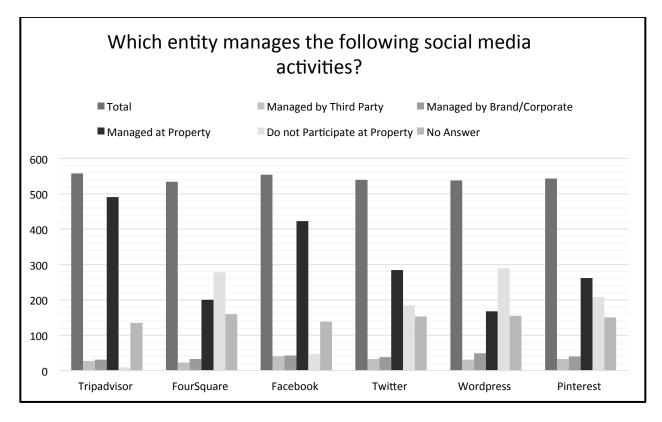
The results are that hotels with multiple employees active in social media are Airport, Economy, Less than 50 rooms, Highway/Interstate, Independent, 50 to 100 rooms, Small Town/Metro, Resort and Franchised. The hotels with the greatest frequency or responses that there is one employee: Managed, Full service, Suburban, 101 to 211 rooms, Over 200 rooms, Upscale and Midscale and Urban, but there is a significance at p = .02 for size of hotel only. A possible explanation for what might not be the intuitive answer of more employees for larger hotels having more social media staff could be that larger, managed, urban and other hotels have a full time dedicated specialist supported by others not dedicated to social media, and for smaller,

franchised, non-urban and other hotels are less likely to have a full time dedicated specialist, and involve more employees in social media.

Eighty-eight percent of respondent hotels manage review site activities at the property level. For hotels with these activities not managed at the property level, it is managed at the brand or corporate level for 50 percent and by a third party for 42 percent. Seventy-six percent of respondent hotels manage social networks at the property level. For the remaining hotels with these social media activities, they are managed at the brand or corporate level for 33 percent and by a third party for 30 percent.

Unlike for review sites for which most activities are managed at the property level, 52 percent of respondents' answers are "Do not participate at the property level" for geosocial media activities. Given the prominence of location to hotel selection, it is interesting to note that more properties do no actively engage in geo-social activities. There are no significant differences among all hotels by property attribute.

Exhibit 3



A finding from the differences among the answers to the management of social media activities is that not all social media channels and programs are managed in the same manner, with some managed primarily at the property level (such as TripAdvisor and Facebook) and others most frequently not managed or without an active program at the property level (such as Geosocial, Media Sharing and Blogs and Forums).

Please rate the importance of the following objectives to your hotel's overall social media initiatives.

Respondent ratings for increasing the number of loyalty or rewards program members, increasing guest satisfaction scores, enhancing positioning, generating media attention, generating referrals, increasing guest spending, increasing the number of guest room reservations, increasing search rankings and other (by writing comments) are:

The highest "extremely important" ratings, so the most important objectives for social media are:

- Increase room reservations 61 percent
- Increase guest satisfaction scores 59 percent
- Increase search rankings 56 percent
- Generate referrals 52 percent
- Enhance positioning 48

percent Still important, but less

important are:

- Generate media attention 36 percent
- Increase loyalty or rewards program members 36 percent

Selected "Other" comments include:

- Appearance of being current and tech savvy
- Engagement with guests
- Enhance emotional connection with guests
- Presence to compete with competitors

The objectives receiving the highest importance rankings are generally the most quantitative and directly associated with direct or indirect effects related to occupancy (Increase room reservations, Increase search rankings, Generate referrals) or another quantitative measure of guest satisfaction scores (Increase guest satisfaction scores).

Another quantitative objective, Increase loyalty or rewards program members is also important.

Less important generally were more qualitative objectives such as Appearance of being current and tech savvy, Engagement with guests, Enhance emotional connection with guests and Presence to compete with competitors. This may indicate an input/output or possibly even a ROI (return on investment) test or thought process for social media. However, answers to the next question may indicate that quantitative or qualitative results are not being estimated or measured.

When asked "Do you estimate or measure the room nights sold that are directly attributed to your hotel's social Media Activities?" Sixty eight percent of all responses are "No", 32 percent "Yes."

There are some significant differences by property attribute, but the highest "no" answers are for Economy (81 percent), Highway/Interstate hotels (80 percent), Franchised (79 percent), Full Service (79 percent), Upscale and Midscale (77 percent), Suburban (75 percent), and 50 to 100 room hotels (75 percent).

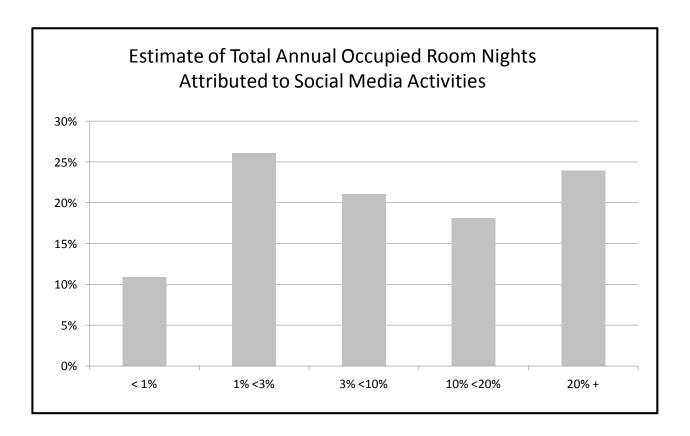
The highest property attribute associated with estimating or measuring room nights sold directly attribute to social media activities is Independents (36 percent). Other property attributes with the highest scores were 101 to 200 rooms, more than 200 rooms, Urban and Small Town/Metro, Upscale and Midscale, all with 32 percent "Yes" answers.

From the literature search and anecdotes, it may be that the challenge to identify social media's direct and even indirect contribution to room nights is an important reason why the effect is not estimated or measured.

As a percent of total annual occupied rooms, what is an estimate of those that can be attributed to social media activities?

The results of this question are only for respondents indicating that social media generated room nights are measured or estimated.

Exhibit 4



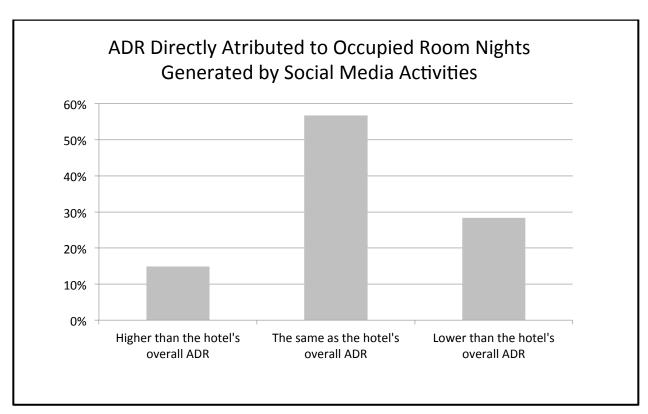
As shown in Exhibit 4, the most frequent answer is one to three percent (26 percent of respondents), but the next most frequent answer was 20 percent or more (24 percent), followed by three to 10 percent (21 percent). The least frequent response is below one percent (11 percent).

These answers indicate an anticipated large effect on occupied rooms from social media. Social media is among the newest type of distribution channel, so for few hotels to realize one to three percent of rooms nights resulting from social media, and many realizing over 20 percent, is a major finding. Based on the literature review and anecdotes, combined with answers in this research about the limited dedicated employees to social media, this maybe an especially cost effective channel.

Is the ADR attributed to occupied room nights generated by social media activity higher, lower or the same as the hotel's overall ADR?

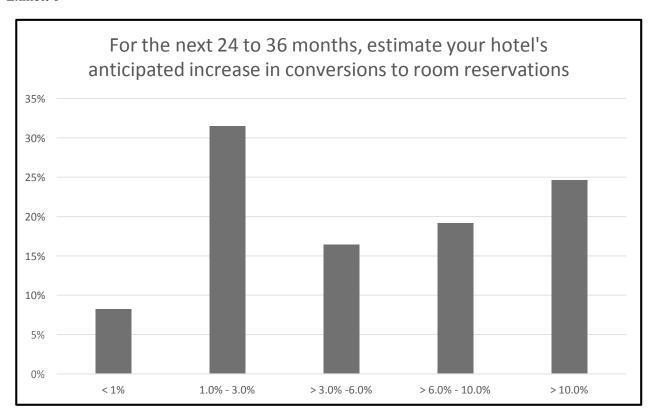
As shown in Exhibit 5, the most frequent answer is "the same" (57 percent), and the next frequent answer was "lower" (28 percent).

Exhibit 5



It may be that it is assumed room rates are lower for social media generated demand is lower because of the assumed comparison shopping, "last minute" reservations and demographics of social media users for hotel decisions. This answer indicates that there is no significant difference in the average daily rate for social media generated rooms the fact that the cost of customer acquisition through social media maybe less than other channels.

Exhibit 6



The two most frequent answers for the largest estimated increases are:

- Review sites (TripAdvisor) one to three percent and greater than 10 percent
- Social networking (Facebook) one to three percent and greater than 10 percent
- Geosocial (FourSquare) less than one percent and one to three percent
- Blogs and forums less than one percent and one to three percent
- Micro blogs and Twitter less than one percent and one to three percent

- Media sharing (Flickr) - less than one percent and one to three percent

There were no significant differences among hotels by property type.

On a scale of High, Medium, Low, None and No Answer, the most frequent responses are:

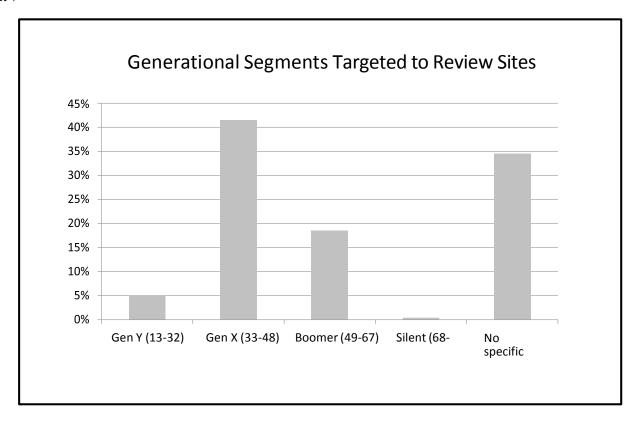
- Attract new guests High (51 percent) refer to Exhibit 7 as an example of these responses
- Beverage revenue None (41 percent)
- Food revenue None (40 percent)
- Longer length of stay Medium (36 percent)
- Loyalty program membership Medium (31 percent)

There are no significant differences among hotels by property attribute, except Trip Advisor and size hotel (p = .05) and Facebook, etc. and location (p = .05)

There was an opportunity for comments; selected comments include:

- Employee morale
- Increase loyalty visits
- Seasonal travel

Exhibit 7



The choices of social media are the same as the earlier questions. The generational segment choices are:

- Gen Y (13-32)
- Gen X(33-48)
- Boomer (49-67)
- Silent (68-91)
- No specific generation

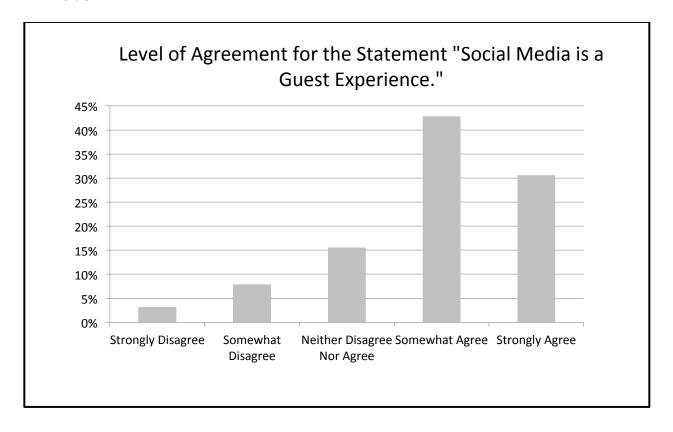
The two most frequent answers are:

- Review sites Gen X (42 percent), No specific generation (35 percent)
- Social networking–Gen X (43 percent), No specific generation (29 percent)
- Geosocial No specific generation (55 percent), Gen Y (27 percent)
- Blogs No specific generation (57 percent), Gen X (25 percent)
- Micro blogs No specific generation (46 percent), Gen Y (29 percent)
- Media sharing– No specific generation (48 percent), Gen X (27 percent)

The target audiences social media activities and programs, especially for Review sites and Social networking, is a Gen X, but for all social media activities "No specific generation" is a frequent answer. Gen Y May have been an intuitive answer because of that demographics association with social media but these results that Gen Y as a specific audience for hotel social media is not necessarily the norm. Boomers, although active with social media (eMarketer, 2013) are not the first or second answer for any social media activity included in the questions. Gen Y, sometimes referred to as Millennials, may have been an intuitive answer because of that demographics' association with social media to the exclusion of other generations.

There are no significant differences among hotels by property type at p = .05 or higher levels of significance from many of the target audiences by property attributes.

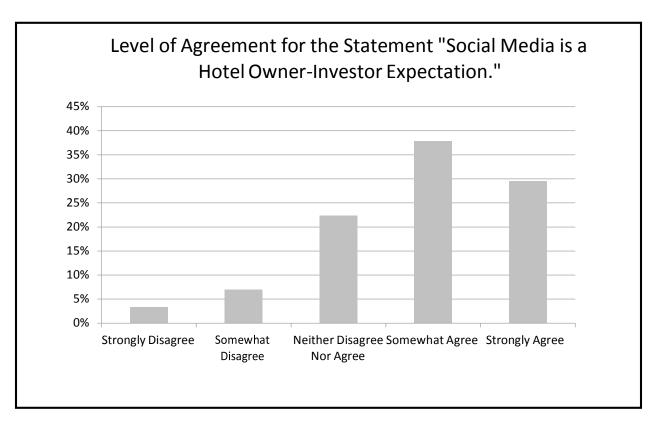
Exhibit 8



As shown on Exhibit 8, 74 percent of respondents Somewhat Agree or Strongly Agree that social media is a guest expectation.

The highest answers about social media as a guest expectation are for Over 200 Rooms (84 percent), Franchised (83 percent), and Full Service (82 percent). The lowest answers are for Less than 50 Rooms (63 percent), Airport (64 percent) and Urban (64 percent). There does not appear to be an obvious pattern of responses. Large and Full Service hotels, but not Urban hotels have high support for the statement. Smaller hotels, but not Franchised hotels have less support for this statement. It may be that attributes not studied in this research are important such as demand segmentation, point-of-origin of guests and region and are areas for future research in the expectations and management of social commerce in hotel properties

Exhibit 9

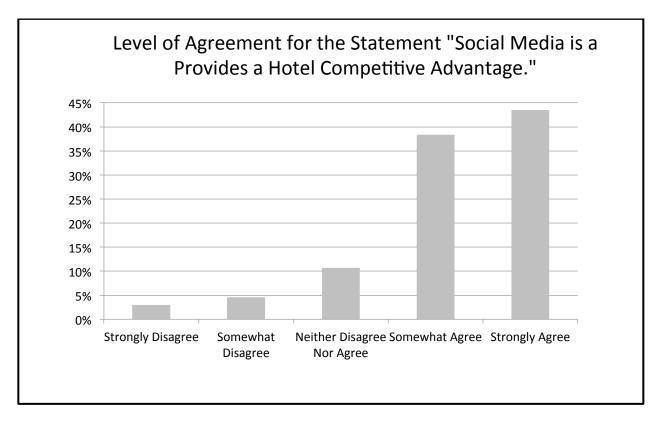


As shown in Exhibit 9, 68 percent of respondents Somewhat Agree or Strongly Agree.

The highest answers about owner and investor social media expectations are for Franchised (75 percent), Suburban (75 percent), and 101 to 200 Rooms (73 percent). The lowest answer is for 50 to 100 rooms (57 percent).

This may be intuitive in that larger and more complex hotels may be associated with more aware or demanding investors and lenders, and may be owned by more aware or demanding owners.

Exhibit 10

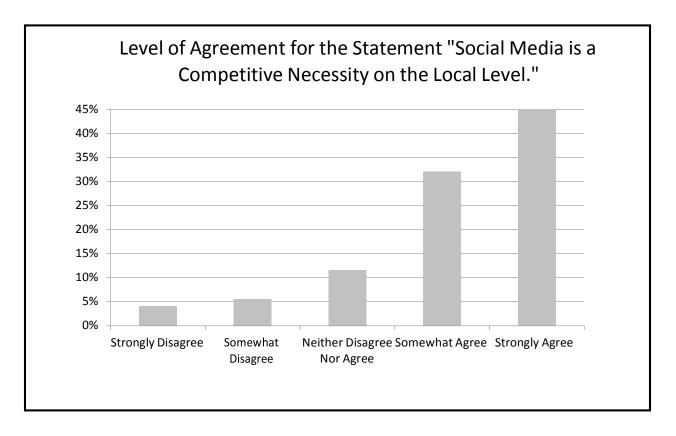


As shown in Exhibit 10, 81 percent of respondents Somewhat Agree or Strongly Agree.

The highest answers about social media as a general competitive advantage are for Highway/Interstate (89 percent), Small Town/Metro (89 percent), Franchised (86 percent) and Over 200 Rooms (86 percent). The lowest answers are for Managed (70 percent), Airport (72 percent) and Independent (78 percent).

It is not in the scope of this research, but it may be that Managed hotels have system marketing and other support, and service levels among hotels and many airport hotels result in less direct competition that some other locations such as Urban, which could explain why answers for these hotels indicate less of a competitive advantage.

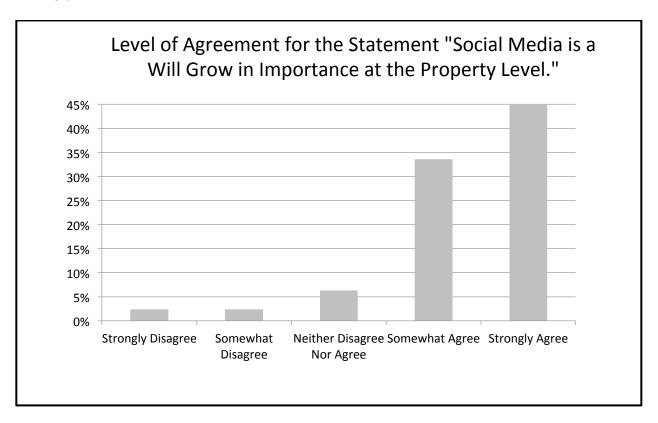
Exhibit 11



As shown in Exhibit 11, 79 percent of respondents Somewhat Agree or Strongly Agree. The highest answers about social media as a competitive necessity on the local level are for Over 200 Rooms (87 percent), Managed (86 percent) and Urban (86 percent). The lowest answers are for 50 to 100 rooms (71 percent) and Small Town/Metro (72 percent).

This question adds "on the Local Level" to the previous question, and there are several different responses relative to the question without the "local level" reference. For Managed hotels, in general social media is not ranked nearly as important as it is on a local level (70 percent compared with 86 percent). For Small Town/Metro, local level social media is not ranked nearly as important as general social media (72 percent compared with 89 percent). The variations between general and local indicates specialized objectives and/or expectations from social media.

Exhibit 12



As shown in Exhibit 12, 89 percent of respondents Somewhat Agree or Strongly Agree.

The highest answers about social media growing in importance at the property level are for Managed (100 percent), Urban (92 percent), 101 to 200 Rooms (91 percent), Resort (91 percent) and Highway/Interstate (90 percent). The lowest answers are for Less Than 50 Rooms (82 percent), Franchised (84 percent) and Independent (84 percent).

This question did not distinguish between general and local social media activities, but answers are that for most respondents social media will become even more important. The question did not request an explanation, so it is not known, but it is possible that the "Disagree" answers could indicate that social media is already important and it may not be that it can become more important.

The research includes what may be some surprising findings about the objectives, use, effects and attitudes related to social media for hotels by hotel executives.

This evolution is demonstrated by examples ranging from increased targeting of individual social media for different objectives and for different generational segments to identification and measurement of the results of social media.

For most hotels, social media activities report to the General Manager (43 percent), but for 30 percent of respondents the function reports to the Director of Sales and Marketing (mostly for larger hotels), but other report to corporate or others. For smaller, franchised and non-urban hotels, the social media function more frequently reports to the General Manager than for full service urban ad larger hotels, for which it more frequently reports to the Director of Sales & Marketing.

Most hotels (55 percent) have one full time employee or one full time employee equivalent dedicated to social media; 20 percent have two and 25 percent have three or more.

The social media activity most managed at the property level are for Review sites (88 percent), such as TripAdvisor, followed by Geosocial and Blog initiatives (52 percent), and Microblogs and Twitter and Media sharing (48 percent). The research reveals that there are differences in the priorities and management of different social media activities, but there are no significant differences by property attribute.

The highest priority objectives of social media are, in order with the highest first are:

- Increase room reservations
- Increase guest satisfaction scores
- Increase search rankings
- Generate referrals
- Enhance positioning

Other important and mentioned objectives include:

- Generate media attention
- Increase loyalty or rewards program members
- Appearance of being current and tech savvy
- Engagement with guests
- Enhance emotional connection with guests
- Presence to compete with competitors

Thirty two percent of respondents estimate or measure room nights sold directly attributed to social media activities, and most answer that social media directly generates occupied rooms.

The answers indicate two most common experiences: that room nights sold directly attributable to social media represent one to three percent of total room nights and the other is that room nights directly attributable to social media represent 20 percent or more of total room nights.

Respondents believe social media effects room reservations, especially from Review sites, Social Networking sites.

The most realized benefits generated from social media activities are:

- Attracting new guests
- Longer length of
- Loyalty program

Selected other mentioned benefits include:

- Employee morale
- Increased return visits
- Increased Wedding exposure

Another indication of the evolution of social media for hotels is the difference respondents indicate about generational groups and type of social media outlet, for example the most frequent responses about type of site and generational segment are:

- Review sites Gen X and No specific generation
- Social networking Gen X and No specific generation
- Geosocial No specific generation and Gen Y
- Blogs and forums No specific generation and Gen X
- Micro blogs and Twitter No specific generation and Gen Y
- Media sharing No specific generation and Gen X

This is in contrast to overwhelming emphasis in the trade press hoteliers courting Millennials with social media initiatives statements that social media may be most targeted to Millennials and Gen Y.

Respondents' answers indicate they believe the following with high "Somewhat agree" and "Strongly agree" rankings, but there are significant differences for hotels with different property attributes.

- Social media is a guest expectation
- Social media is a hotel owner/investor expectation.
- Social media provides a hotel competitive advantage.
- Social media is a competitive necessity on the local level.
- Social media will grow in importance at the property level.

The differences follow patterns for some property attributes, with larger hotels sharing some views about higher owner/investor expectations, competitive necessity on a local level, and lower importance for general competitive necessity. Smaller hotels share views with lower importance for competitive necessity on a local level and increasing importance at the property level.

Irrespective of the importance of social media to one type of lodging property or another, lodging investors, owners, and operators must continue to evaluate the cost-benefit relationship of investing in human and financial capital into the ever evolving social media landscape. Today, the reality that social media are a means to influence hotel guest behavior is receding to the management imperative to better measure magnitude and direction social media may drive revenue and other marketing objectives of American lodging operations.

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