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First-party data and customer trust: The keys to succeed in APAC's new privacy era

Lessons from conversations with leading publishers and app developers across the region

Executive Summary

MAKING AN IMPACT THAT MATTERS since 1845

Key report findings and recommendations

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Introduction

This report, based on interviews with and a survey of publishers and app developers (the "**sell-side**") across APAC, builds on similar research in Europe and the Americas and aims to provide a qualitative summary of:

01 The **privacy state of play** across the APAC advertising ecosystem and the sell-side perspectives on it.

02 An articulation of the **implications** of existing and upcoming privacy changes for sell-side players.

03 **Tangible steps** which sell-side players can draw inspiration from as they face a more privacy-centric future.

Research highlights

14 **markets** covered across APAC, including 72 interviews and 88 survey respondents

65% of respondents expect **advertising revenues to fall** due to the rise of privacy

73% of respondents believe that **using first-party data would mitigate** the impact of the rise of privacy

Key findings

01 Lower focus on privacy in APAC

Despite strong support for recent privacy changes, privacy is yet to become as much of a focus for sell-side players in APAC as it is in Europe or the Americas. This is due to both the nature of the APAC market (e.g., a predominantly mobile market forecast to grow faster than global average with resilient traditional media), and the fact that privacy impacts sell-side players very differently across the region.

02 Differing approaches to privacy

Sell-side players are responding to the rise of privacy in starkly different ways, depending on their appetite to invest ahead of the market, as well as their ability and willingness to embrace first-party data-based solutions.

03 Though market leaders are seeking to differentiate through trust and first-party data, the relative lack of action remains a source of concern

Given the wide-ranging impact that privacy can have on all sell-side growth levers, the relative lack of action across APAC remains worrying. Nevertheless, it is encouraging to see market leaders aiming to build significant competitive advantage in the age of privacy by focusing on customer trust and first-party data.

04 The time is now

It is not too late to take action, and a growing number of solutions are readily available. However, given the journey towards privacy readiness can take years, there is not a moment to waste.

Recommendations

The awareness of the impact of the rise of privacy is leading sell-side players to take a broad range of actions, which our report aims to summarize.

Setting up for first-party data success
First-party data is expected to be a core source of competitive advantage in a more privacy-centric ad sales ecosystem. Focusing on collecting, storing, analyzing and leveraging it is key to privacy readiness (*Chapter 2*).

Connecting to advertisers and agencies
The withdrawal of support for third-party cookies will require that you choose a different way to connect to advertisers and agencies (the "**buy-side**") in line with your context, strategy and view of privacy (Chapter 3).

Winning through first-party data
Success in a more privacy-centric ad sales ecosystem will require that you lean into difficult trade-offs around investment timing and data strategy (Chapter 4).

Making progress on your privacy journey
Leveraging existing and new partners, do not delay starting your privacy journey (Chapter 5).

Chapter 01

Privacy state of play across APAC and its implications for publishers and app developers

The evolving privacy landscape across APAC

Over the past five years, the APAC region has witnessed a rise in its focus on privacy, in the form of rising consumer concern, increased regulatory intervention and changes to platform policies placing constraints on the use and collection of user data.

The rise of privacy

Over the past five years, the Asia Pacific (APAC) region has witnessed a steady increase in its focus on privacy in the form of increasing regulatory intervention, changes to platform policy and an increase in consumer concern over how data is used online.

This increased focus on privacy is already having a **profound impact on the way advertising is bought and sold throughout the region**, affecting every aspect of publisher and app developer business and operating models.

Consumer Concern	• Rising concerns over privacy, mainly among consumers with higher digital sophistication in large metropolitan centres, have contributed to the increased focus on privacy across the wider ecosystem.
Regulatory Intervention	• In response to consumer concern and in line with their counterparts around the globe, regulators across the region have both introduced new privacy regulation and amended existing privacy laws over the past few years. • Their intervention has mainly focused on defining what constitutes personal information, defining consumers' rights when it comes to managing their privacy, and setting clearer guidelines for how personal data should be captured, stored and shared.
Platform Policies	• Changes implemented at the global level by major browsers and app operating systems, such as the withdrawal of support for third- party cookies, easy-to-use interfaces asking users to opt in to data sharing and changes to mobile AdIDs have put constraints on the way publishers and app developers collect and use user data.

Important terminology used in report

Market players

The advertising marketplace consists of:

- **Sell-side**: All companies that sell advertising solutions. For the purposes of this research, this includes broadcasters, publishers and app developers.
- **Buy-side**: Brands and their agencies that advertise their products and services through advertising solutions provided by the sell-side.

Types of Data

For simplicity, we will use the term **"first-party data"** throughout this report to refer to both zero-party data and first-party data:

- **Zero-party data**: Data directly contributed by the user at key touchpoints on the customer journey (e.g., consent, registration subscription, purchase) or through an ongoing dialogue with publishers and app developers (e.g., surveys, product testing).
- **First-party data**: Data indirectly obtained through analysis of user on-platform behavior (e.g., purchase history or behavioral data).

An asymmetric impact in the APAC advertising landscape

The rise of privacy is having an asymmetric impact across the region and sell-side players are responding in starkly differing ways.

Multiple factors sharpening contrasts across APAC

The following factors impact the extent to which sell-side players are having to evolve their data and advertising strategies in response to the rise of privacy:

1. **Regulatory intervention**: Dedicated privacy regulation now covers a significant percentage of the APAC population, with more platform and regulatory developments set to take place over the coming months and years.
2. **Platform penetration**: The market penetration of browsers that have withdrawn their support of third-party cookies or app operating systems that ask users to opt into data collection increases the degree to which a publisher needs to source first-party data to fuel growth.
3. **Ad market sophistication**: The reliance of audience matching drives the degree to which advertising revenues are impacted by a player's ability to source the data required to deliver audience-based advertising solutions.

The prevalence of these factors **varies greatly across markets**, leading privacy to impact sell-side players in **widely asymmetric ways** across the APAC ad sales ecosystem and partially explaining the **breadth of responses by sell-side players**.

An asymmetric impact

1. Limited impact to date
- Emerging privacy regulation
- Low platform penetration
- Low ad sales sophistication

2. Moderate impact to date
- Evolving privacy regulation
- Medium platform penetration
- Growing ad sales sophistication

3. High impact to date
- Evolving privacy regulation
- High platform penetration
- Growing ad sales sophistication

4. Highest impact to date
- Mature privacy regulation
- High platform penetration
- Higher ad sales sophistication

Mixed signals from sell-side players

01 **Intent to invest in privacy readiness**:

On the one hand, players are planning to take action to make the most of the rise of privacy:

- 65% of respondents shared plans to increase their focus on first-party data to mitigate the loss of customer insight from the withdrawal of consumer consent for data collection and of browser support for third-party cookies.
- Close to two-thirds of respondents reported making privacy a key priority, with close to a fifth even going so far as to state that privacy was a "key strategic pillar".

02 **Delay response**:

On the other hand, players across APAC who are choosing to delay investing in a meaningful response to privacy claim to do so for the following reasons:

- The future is too uncertain
- Local and global competitors are making it hard for them to compete
- There is no regulatory or consumer imperative to invest
- Low buy-side willingness to pay makes it harder to make the case for investment

Support for privacy despite wide-ranging impact

Despite the widespread impact of privacy on sell-side growth levers, sell-side players expressed strong support for recent changes, seeing privacy as a mix of opportunity and business challenge.

Wide-ranging impact of privacy

Unless mitigation action is taken, privacy can have **a wide-ranging impact on sell-side performance:**

1. **Impact on core drivers of performance:** More than 75% of survey respondents indicated that the withdrawal of support for third-party cookies would result in, at least, some impact on core drivers of performance, such as audience matching, campaign management and user acquisition.
2. **Impact on advertising revenues:** Nearly 70% of survey respondents acknowledged a decline in their advertising revenue, with more than a third experiencing a decline of at least 25%, following the partial withdrawal of third-party cookie support and on app operating systems requiring users to opt into data collection.
3. **Impact on expenditures:** A third of survey respondents expect to increase both cost and capital investment to respond to the rise of privacy.

"The real impact will not be felt until support for third-party cookies goes away!"
Japanese publisher

Support for privacy

Despite the impact of privacy on business, we witnessed **a widespread support for privacy changes**:

- **Privacy changes welcomed as timely or overdue:** More than two thirds of survey respondents expressed the view that changes are either coming at the right time or are long overdue. In line with international peers, this perspective appears to be consistent across web and app-based players and geographies.
- **Confidence in capturing data needed in a privacy-centric future:** The broad support for privacy seems to be driven, in part, by a certain level of confidence in capturing the data needed, with close to three quarters of respondents believing that they will have at least most of the data they will need to thrive in a privacy-centric future.

Similarly, the rise of privacy seems to **have done little to erode sell-side belief in the attractiveness of digital advertising across web players**:

- Close to 70% of survey respondents expressed a view that digital advertising will remain at least as attractive as a monetization approach as it is today.
- The same cannot be said for app players, who seem to be looking to other forms of monetization, especially in-app purchases, to drive continued revenue growth.

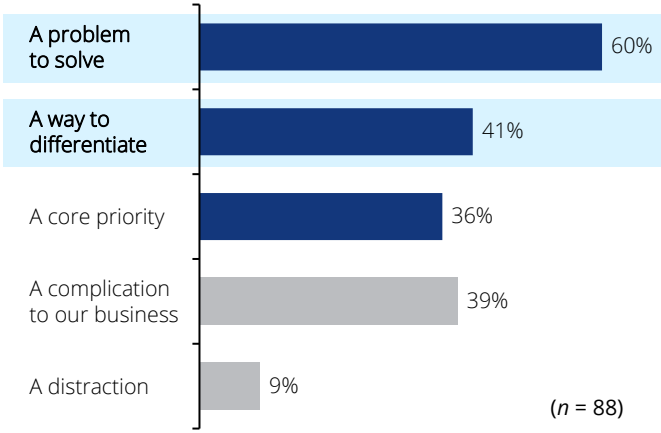
Privacy as a mix of opportunity and business challenge

APAC publishers and app developers are seeing privacy as **a mix of opportunity and business challenge**.

Awareness of the impact of the rise of privacy is leading sell-side players to, at least, plan to take a broad range of actions.

Whether you see privacy as a problem to solve or as a way to differentiate, we hope that the learnings in this report help you to accelerate your privacy journey.

How do you view the **increased focus on privacy?**



Chapter 02

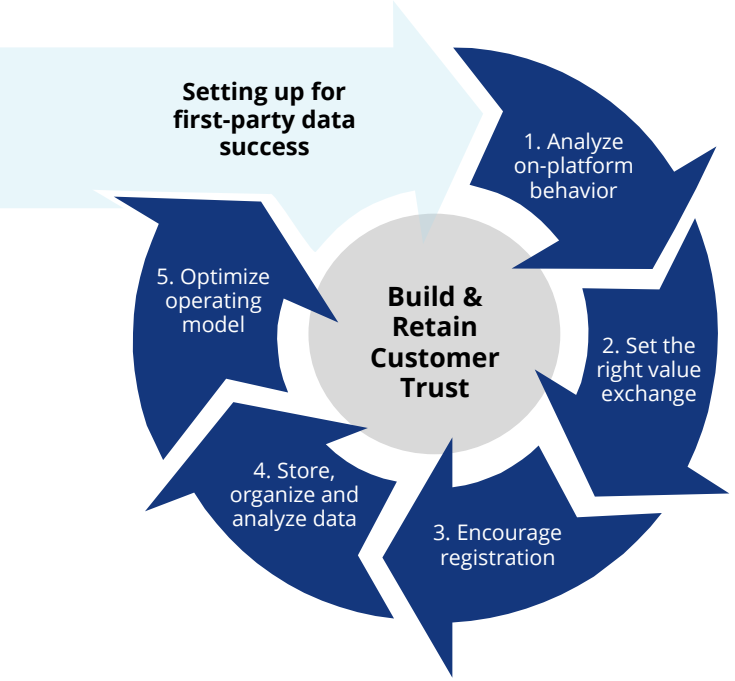
Setting up for first-party data success

Setting up for first-party data success by building customer trust

Customer trust serves as the foundation of an effective first-party data strategy, which starts with a robust approach to data collection, storage and analysis, underpinned by the right operating model.

Setting up for first-party data success

Despite differences across geographies, 65% of our survey respondents reported plans to **evolve their data strategy** in response to the rise of privacy, starting with an increasing focus on **collecting more data as part of a trust-based relationship with their customers**.



Building and retaining customer trust

To achieve this objective, some of our respondents took great care in **the way they communicated with their consumers**, **laying the foundation for a two-way relationship that will build and sustain customer trust**.

This approach has allowed them to achieve consent rates of up to 85% and opt-in rates of up to 55%, showing that privacy does not have to come at the expense of data collection and good business.

Top tips from market leaders on how to earn customers' trust:

- Use simple language
- Tell customers what they will get for opting in
- Make it clear why you are collecting data
- Do not sound like a lawyer
- Do not use misleading visuals (especially buttons)
- Use UX to remind users of the benefits of opting in

1. Analyze on-platform behavior

Understanding that the **collection of personal information from users on one's platform is compatible with privacy**, provided such collection is done in a fair, transparent and privacy-preserving manner and that data is **used responsibly**, many publishers and app developers we spoke to prioritized **collecting data about customer behavior on their own platforms**. Challenging themselves to "**only collect the data you need**", they used this tactic to gain deep insight into customers without ever having to ask them to contribute personal information.

2. Set the right value exchange

Virtually all the players we spoke to understood that successfully collecting first-party data at scale required offering customers something in exchange. Such incentives include:

01 Personalization
02 Access to a greater volume of content
03 Access to premium content
04 Access to advanced functionalities
05 Financial and non-financial rewards
06 A two-way relationship

3. Encourage registration

Using a mix of value exchanges, close to 75% of survey respondents **made registration a priority** on, at least, a part of their platform. In so doing, they are creating the foundation for a rich data model that can drive all activities across the company.

Setting up for first-party data success by building customer trust

Making the most of first-party data requires the right capabilities and new ways of working.

4. Store, organize and analyze data

Coming hand in hand with the need to capture data through a direct relationship with customers is the question of how best to store it, prepare it, and develop it.

In contrast to their international peers, the APAC players we surveyed still primarily relied on third-party hosted Data Management Platforms (DMP) and third-party Customer Data Platforms (CDP), rather than building their own customized CDPs.

However, we did encounter **a few players opting to drive their ad sales efforts from owned and operated CDPs**, out of a desire to **take more control over first-party data**. Doing so enabled them to:

01 Craft a more holistic data strategy powering multiple parts of their business

02 Minimize system integrations and handovers

03 Make better use of first-party data through the use of machine learning

04 Control who uses their first-party data

Managing first-party data complexity

- ☐ Clean your data
- ☐ Make your data usable by all key systems
- ☐ Make sure that all use cases link to KPIs
- ☐ Set a standard taxonomy across properties
- ☐ Leverage first-party identifiers

Augment data

Similarly, the high-quality third-party datasets and technical sophistication required to augment first-party data seem yet to materialize around the region. Instead, multiple players, achieving fill rates of up to 80-90%, recommended using first-party data-based "**natural segments**" (e.g., age, income, language) to underpin segmentation in low data maturity markets.

> "You need to have a very clear data structure in mind."
>
> **Large Indian publisher**

5. Optimize your operating model

Beyond technical sophistication, our most advanced interviewees took great pain to stress that, at the heart of any data maturity effort, is a **data team, working in close partnership with every part of the organization**.

Similarly, **the right structures and processes** need to be put in place to ensure a robust approach to privacy protection.

Setting up governance

Levers used by respondents (n = 88)

44% Clear internal data governance to ensure proper handling of personal data	59% Consent forms
34% Regular training to reinforce the importance and compliance with guidelines	44% No sharing of emails or phone numbers with third parties
20% Sophisticated defenses against cyber-attacks	41% No sharing of any kind of personally identifiable information with third parties
17% Only share hashed email add. or phone nos. with third parties	

Chapter 03

Connecting to the buy-side

A need for new solutions

The withdrawal of support for third-party cookies requires alternative ways to connect to the buy-side, which sell-side players should choose based on their unique context and perspective on six key dimensions.

The need for new solutions

Third-party cookies and mobile AdIDs have provided an easy, albeit imperfect, way to match sell-side audiences with buy-side demand. Following the rise of privacy, sell-side players need **alternative ways to connect to the buy-side**.

Choosing solutions

Speaking to publishers and app developers around the region, many of whom had not yet evolved their strategy, it became clear that the choice of a particular solution **depended on a company's unique context and perspectives on six dimensions**:

01 The degree to which a company has access to plentiful relevant first-party data

02 The level of sophistication of a company's data management efforts

03 Whether a company's ad sales efforts are focused on enabling individual or cohort matching

04 The extent to which it was willing to invest in the face of significant uncertainty

05 Whether a company believes sharing encrypted personal identifiers is in line with privacy

06 Its willingness to trust a third-party with its first-party data

Type of Solution		How it works
First-party data-based solutions	**Ad exchange based**	Publisher creates custom audiences based on consumer attributes and makes them available for purchase through an exchange
	Clean rooms	Publisher and advertiser both provide identifier into a clean room to identify a set of users that meet advertiser needs
	First-party identifiers	Publisher creates encrypted identifiers that are specific to its site(s) and shares it through its ad exchange, selecting with whom this ID can be shared
Third-party solutions	**Third-party audiences**	Buy-side and sell-side send attribute data to an SSP, moderation platform or ad exchange provider, which is used by the provider to build audiences
	Third-party ID graphs	Third-party player creates a "unified" identifier based on hashed email or phone number provided by both buy-side and sell-side, who are then allowed to use this ID to trade
	Browser based solutions	Browser highlights characteristics of a site (e.g. key focus, topics of conversations) to allow buy-side to target the site

A lack of clarity on solutions

Though market leaders recommend focusing on a few tools to make the most of them, the lack of consensus on which solution will prevail is creating confusion and delaying adoption.

A lack of clarity on solutions

While many solutions are available, each has its own set of challenges and most are yet to meet with significant demand from the buy-side.

As a result, it is not surprising that there is no consensus on what solution will prevail across the APAC region, making it **harder for players to choose the best path forward**.

Focus on key tools and don't get distracted by tech

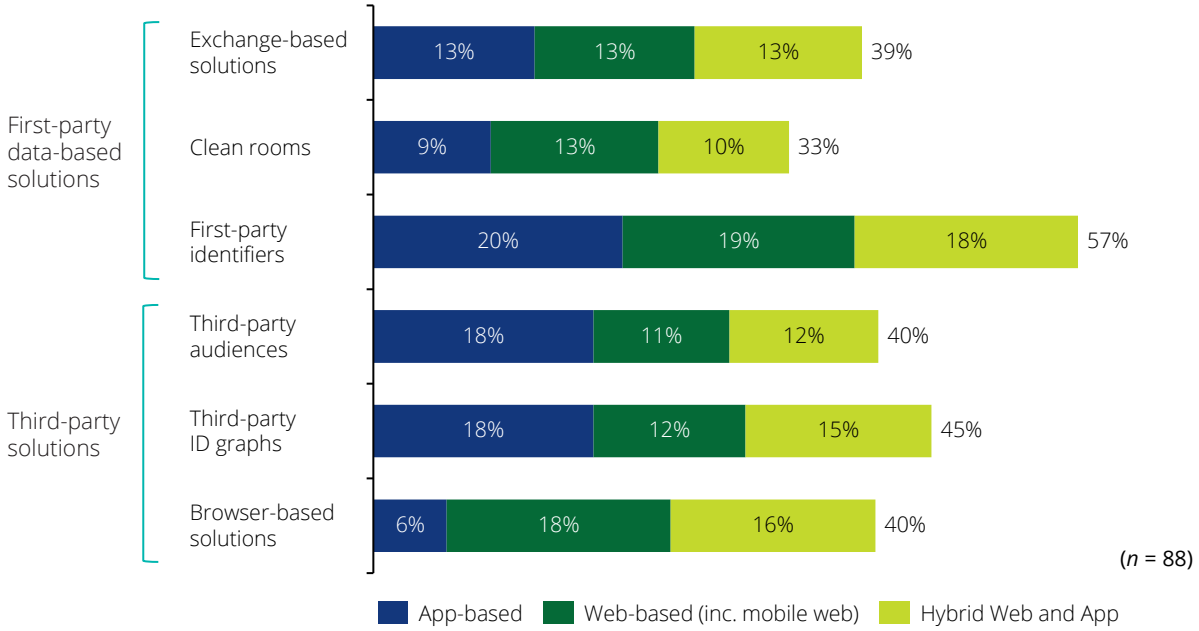
Even though solutions are readily available, and the awareness of options is high, our research points to a distinct lack of Ad Tech innovation across most of APAC.

In fact, market leaders advised that all innovation was not worth pursuing, recommending instead that all players "not get distracted by all the tech", **focus on a few key solutions** and get to know their tools so that they can make the most out of them.

"The fact that no one solution has emerged as the standard makes it harder for us to define our strategy."

Leading Japanese publisher

How important to your Ad Sales effort do you expect the following **Ad Sales solutions** to become in a privacy-centric future? (Aggregated response of "**Important / Most Important**")



Except for first-party identifiers that are deemed important or very important to close to two thirds of our publishers, we witnessed a very evenly spread response to the various technologies currently available to connect to the buy-side.

Chapter 04

Winning through first-party data

Strategic choices by sell-side players

In the face of uncertainty, APAC sell-side players we surveyed claimed to be making very different strategic choices, although we expect strategies to converge towards the use of more first-party data moving forward.

Four strategy archetypes

While we witnessed **a broad range of approaches** to deal with the rise of privacy, our research highlighted **four sell-side strategy archetypes**, each with its own set of technological solutions, based on the approach to the following dimensions:

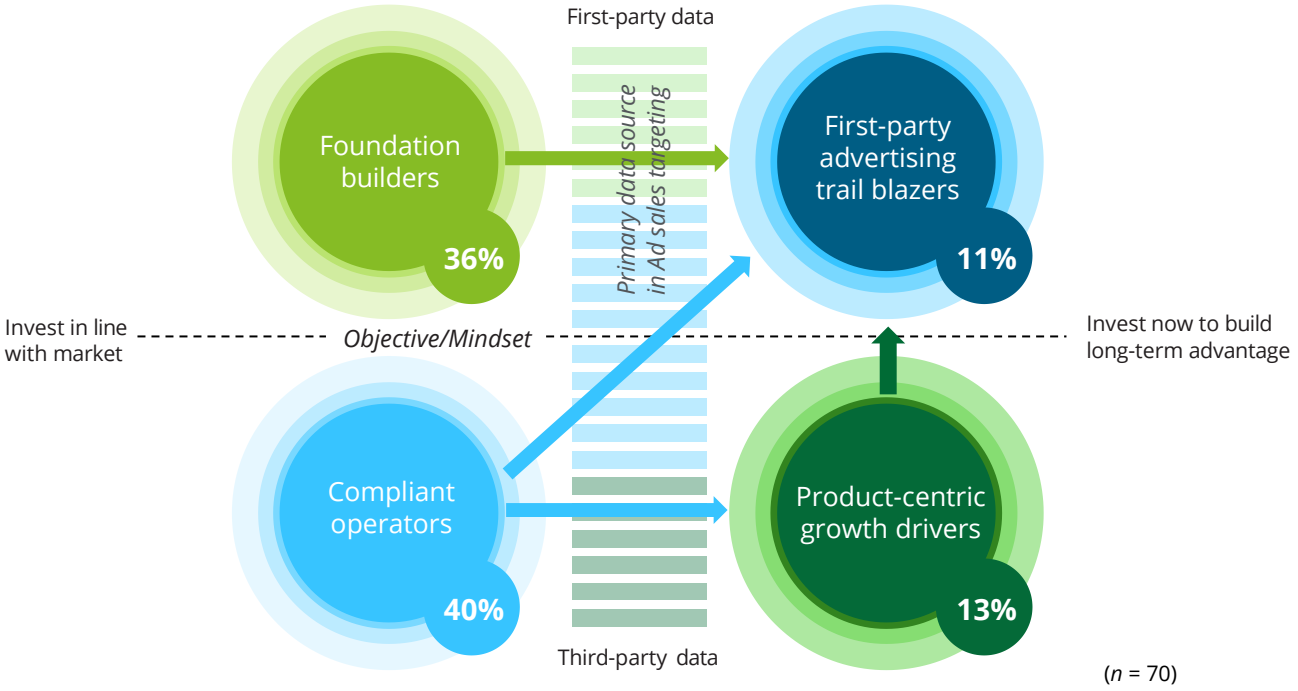
1. To primarily use first or third-party data in audience matching.
2. To invest in line with the market or to invest now to build long-term advantage.

At this stage, the overwhelming majority of players seems to be timing investments in line with market developments, but **we expect strategies to evolve** going forward:

01 Once Foundation Builders complete their investment in underlying capability, they will naturally attempt to roll out more sophisticated use cases.

02 As we are already witnessing, some Product-centric Growth Drivers will "take the plunge" and invest in first-party data-based capabilities to differentiate in ad sales.

03 Compliant Operators will "get off the fence" and start investing more aggressively to catch up and even leapfrog competitors.



Peeking into a first-party future?

The shift towards first-party data-based solutions is likely to be led by players who, by investing early, aim to build upon their competitive position in the age of privacy.

Winning through first-party data

While the benefits of first-party data reach far beyond advertising, **our research identified five ways leading players are leveraging first-party data** to keep and build on their competitive position in ad sales.

Five ways to supercharge ad sales growth:

- ☐ 1. Fuel more effective audience matching
- ☐ 2. Build a more direct relationship with the buy-side
- ☐ 3. Optimize ad placement
- ☐ 4. Drive user acquisition
- ☐ 5. Unlock new forms of monetization

Investing early in first-party data

Despite these benefits, **it can be hard to make the decision to invest in first-party data-based solutions**.

Third-party solutions can appear to provide simpler, more readily available solutions requiring lower capex. Yet, these solutions hand over many levers of ad sales success to a third party and deprive sell-side players of many of the benefits of first-party data.

In this context, the majority of players we surveyed has chosen to time investment in line with the market.

Meanwhile, **a few players in the very same markets chose to invest early** in order to be in a position to differentiate once planned privacy changes materialize.

Based on our conversations with them, their decision to embrace this bold strategy was based primarily on:

01 Their experience in more privacy-centric markets.

02 The knowledge of how long it can take to develop the capabilities required to achieve privacy readiness.

03 Deeply-embedded customer centricity.

Leading the way in a privacy-centric future

The evolution towards using more first-party data is likely to be led by the players who have chose to invest early. These First-Party Trail Blazers will continue to build and capitalize on their differentiating access to data, and could focus on:

01 Collecting transactional data

02 Insourcing data capabilities

03 Advanced analytics

At the very least, it seems likely that many global players will bring these capabilities and practices to APAC and influence the share of the region's digital ad sales ecosystem.

To be sure, timing will vary greatly across players and geographies, but one thing is certain: **Status quo is simply not an option.**

"I think that it has almost become a necessity to own the relationship with the customer, own your own consumer data platform and own the ways that you connect third parties."

Global, US-based publisher

Chapter 05

Making progress on your privacy journey: The time is now

Making progress on your privacy journey

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While there is some time left to catch up on privacy readiness, doing so will require increased focus and collaboration.

An opportunity to catch up on privacy readiness

Google's decision to delay the withdrawal of its support of third-party cookies in Chrome and the time left before changes to the Android AdID have given publishers who are yet to progress on their privacy readiness journey an opportunity to catch up.

At the same time, with respondents reporting years spent on their privacy journey, **these changes are really just around the corner**.

Making progress on your privacy journey

- ☐ 1. Stay abreast of developments
- ☐ 2. Understand how privacy impacts you
- ☐ 3. Join and shape the conversation
- ☐ 4. Lead from the top
- ☐ 5. Experiment at scale
- ☐ 6. Make it a company-wide effort
- ☐ 7. Never walk alone
- ☐ 8. Partner for success
- ☐ 9. Don't delay!

Understand the wider implications of privacy

(Stay abreast of developments, understand how privacy impacts you, and join and shape the conversation)

If you have not done so, we strongly encourage you **get up to speed with and keep abreast of both technological and legal developments impacting privacy** in your markets. Regardless of where you are on your privacy journey, it is **essential that you take an honest look at how privacy is impacting all parts of your business and your relationship with customers**.

Additionally, given that the future of privacy is still being written, this is **a "once-in-a-generation opportunity" to shape the future of the ecosystem** by engaging in conversations that will shape the regulation and platforms that will underpin digital ad sales and preserve privacy for years to come. Don't miss out!

Appreciate how privacy changes are carried out in your company

(Lead from the top, experiment at scale, and make it a company-wide effort)

Leading from the top is critical, especially when considering that 35% of respondents prioritize commercial goals over privacy most of the time. As a result, building awareness, understanding and strong buy-in from the top will be a key step in the journey. Doing so in a way that emphasizes customers and the best approach to **earning and retaining their trust** may help achieve increased focus and buy-in.

The journey towards privacy readiness is **a multi-functional effort** requiring engagement from many parts of the organization and can have many leaders. Furthermore, **the path to success is not a straight line**, often requiring much experimentation before gaining confidence to invest at scale.

Privacy as a team sport

(Never walk alone, and partner for success)

Many of our respondents reported **reaching out** to peers, industry bodies, advisors or even, in a third of cases, technology providers for advice and support.

Similarly, in some geographies, we witnessed players **joining forces with others** to build scale quickly. Though well received by the buy-side, these collaborations are not without their challenges, making proper planning essential to increasing the odds of success.

The time is now

Leading players are already forging ahead to build competitive advantage in a privacy-centric era and the journey towards privacy readiness can take years, so don't delay and take action now!

Don't delay!

Much as APAC will be in a better position to catch up given the availability of tried and tested solutions, we were concerned when witnessing a certain passivity only months before major global platform changes are scheduled to take place.

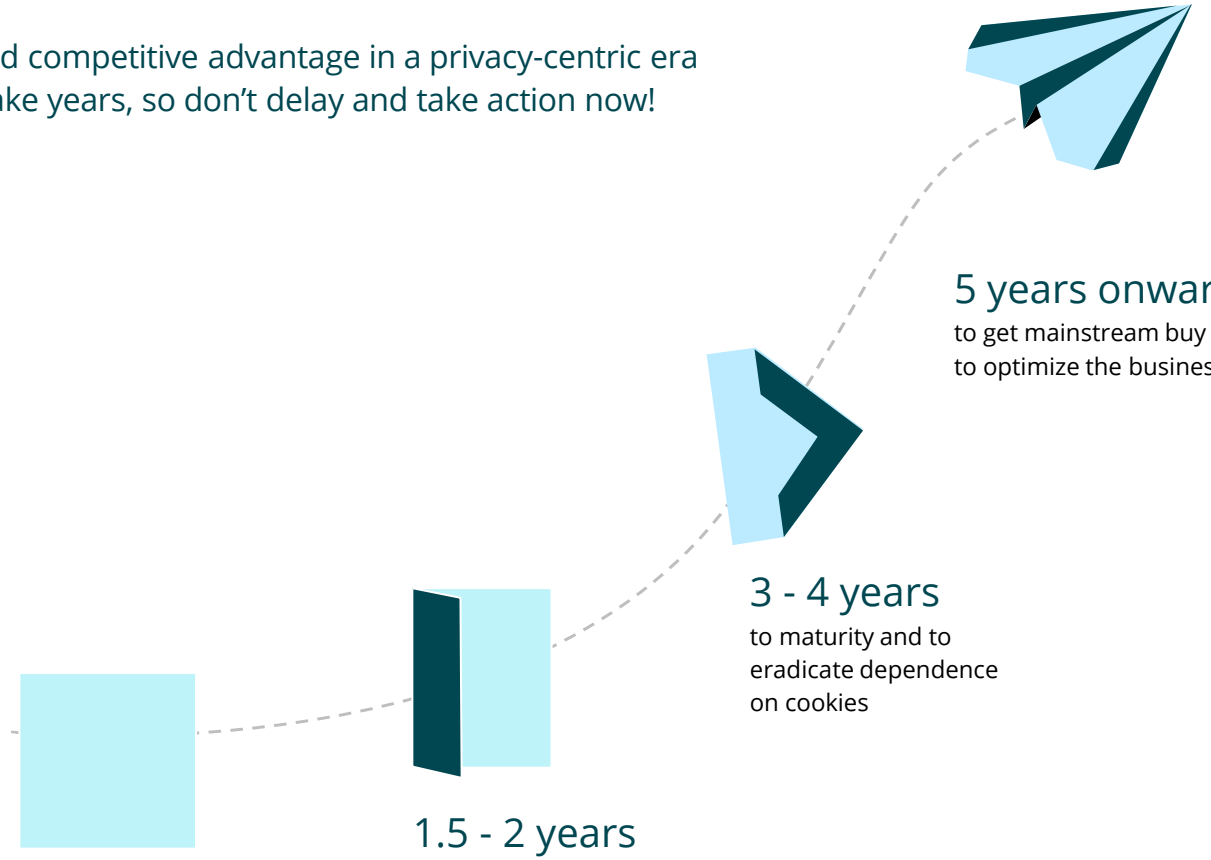
No matter how "local players can be fast followers", it was striking to see **how leading players are already forging ahead**, gaining customer trust and collecting more first-party data, in the hope to build significant competitive advantage in a privacy-centric era, **while so many are still waiting to start on their privacy journey**.

The journey towards privacy readiness can take years, so don't delay, and take action now.

There is simply no time like the present.

"Urgency has not dropped since the delay in third-party cookie deprecation."

Leading Singaporean publisher



"Be patient...
Don't give up...
This takes time."

Indian app developer

Appendix

Methodology

Methodology

Context of this study

In partnership with Google, Deloitte conducted research, interviews and surveys to better understand the current APAC privacy landscape, seeking to uncover the general sentiment and to identify the solutions that have been adopted by publishers and app developers who have utilized Google and Deloitte's services in their Ad Sales business.

Research methodology

In the course of this study, the team adopted the following research methodology:

Primary research
Interviews and survey with publishers and app developers and privacy regulation experts

Secondary research
Review of privacy regulation and ad market drivers

Insights generation
Analysis of data research to derive insights

Insights validation
Discussion of findings with local market experts

Diverse range of perspectives

Our perspectives are shaped by input from a wide range of respondents, covering both publishers and app developers across APAC.

Interviews were conducted with:	over 70 publishers / app developers in APAC
Survey gathered responses from:	close to 90 publishers / app developers in APAC

Markets covered:

Australia	5
China	11
Hong Kong	4
India	24
Indonesia	4
Japan	11
South Korea	6
Malaysia	2
New Zealand	2
Pakistan	2
Singapore	4
Taiwan	5
Thailand	2
Vietnam	5

Publishers covered:

APP developers	31
WEB publishers	41
Hybrid players	16

(Web and App businesses generate broadly equivalent revenue)

Interpretation of report insights

Given the nature of this study, the insights uncovered are primarily qualitative in nature, and should be interpreted with the following **guidelines** in mind:

- Given its qualitative nature, this report aims to **capture the essence of our findings rather than any statistically significant approximation of market reality.**
- **Any quotes** included in this report should be read as **reflecting the opinion of respondents**, in line with broader research findings
- **Figures stated should not be read as market generalization** (i.e., it would be inaccurate to state that: "X% of APAC companies believe...").
- It is important to remember that **APAC-wide findings hide very widely different** realities across APAC.

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