What We Are Learning from COVID-19 and How it Could Impact Transportation Planning in the San Diego Region

Board of Directors Meeting | July 24, 2020
Regional Plan and Transportation Projects: State and Federal Laws

- Climate change and air quality: greenhouse gas emissions, smog, localized air pollution
- Social equity: compliance with federal civil rights requirements (Title VI) and environmental justice considerations
- SB 743: shift to vehicle miles traveled to evaluate impacts of transportation projects
Learning from the COVID-19 Crisis: Re-envisioning Transportation Investments
Economic Crises in the 21st Century

- September 11 Attacks
- “Dot-Com” Bubble
- Housing Market Bubble
- Auto Crisis
- Sub-Prime Mortgage Crisis
- Global Financial Crisis
- Great Recession
- COVID-19 Recession

Timeline:
- 2000: Recession
- 2001: “Dot-Com” Bubble
- 2002: September 11 Attacks
- 2003: Housing Market Bubble
- 2004: Auto Crisis
- 2005: Sub-Prime Mortgage Crisis
- 2006: Global Financial Crisis
- 2007: Great Recession
- 2008: COVID-19 Recession
COVID-19 Impacts Many Aspects of the Lives and Communities in our Region

Unemployment
- Reduction in Savings
- Inability to Pay Mortgage
- New Career

Communities
- Families
- Geographies
- Mental Health
- Race & Ethnicity
- Transportation

Economic Sectors
- Tourism & Entertainment
- Hospitality
- Restaurants/Food & Beverage
- Retail

Small Business
- Closures
- Layoffs
- Inability to pay bills

Taxable Sales
- Sales Tax Revenue
- Local Jurisdictions
- TransNet Revenue
## Tracking the Reopening

SANDAG is monitoring key variables to determine how far each one is from returning back to normal (pre-COVID-19 levels)

### Unemployment

<table>
<thead>
<tr>
<th></th>
<th>Pre-Covid</th>
<th>March</th>
<th>April</th>
<th>May</th>
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<th>July</th>
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<tr>
<td>Rate</td>
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### VMT

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</thead>
<tbody>
<tr>
<td>Rate</td>
<td>100%</td>
<td>101%</td>
<td>93%</td>
<td>54%</td>
<td>54%</td>
<td>58%</td>
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</table>

### Overall Mobility Data

#### Retail and Recreation

<table>
<thead>
<tr>
<th></th>
<th>Pre-Covid</th>
<th>March</th>
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<tbody>
<tr>
<td>Rate</td>
<td>100%</td>
<td>103%</td>
<td>98%</td>
<td>55%</td>
<td>49%</td>
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#### Grocery and Drugstore

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<tr>
<th></th>
<th>Pre-Covid</th>
<th>March</th>
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<th>May</th>
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<tr>
<td>Rate</td>
<td>100%</td>
<td>102%</td>
<td>108%</td>
<td>102%</td>
<td>79%</td>
<td>73%</td>
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### Foot traffic by type of business

#### Supermarket

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<thead>
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<th></th>
<th>Pre-Covid</th>
<th>March</th>
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<th>May</th>
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<td>Rate</td>
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#### Apparel Stores

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<th>March</th>
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<tr>
<td>Rate</td>
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<td>64%</td>
<td>24%</td>
<td>19%</td>
<td>23%</td>
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#### New Car Dealers

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<tr>
<td>Rate</td>
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<td>96%</td>
<td>80%</td>
<td>40%</td>
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#### Building Material and Supply

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<td>Rate</td>
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<td>54%</td>
<td>69%</td>
<td>93%</td>
<td>76%</td>
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#### Home Garden and Equipment

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#### Personal Care Services

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<td>39%</td>
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#### Golf Courses and Country Clubs

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<th>Pre-Covid</th>
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<th>May</th>
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#### Fitness and Rec Sports Centers

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#### Airport

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#### Restaurants

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<th>Pre-Covid</th>
<th>March</th>
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#### Hotels

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<th>April</th>
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#### Others

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#### Restaurant Reservations

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Source: SANDAG based on Applied Geographic Solutions, Inc., Thousand Oaks, California; Caltrans PeMS, Google mobility, SafeGraph COVID-19 Response Dataset - Weekly Patterns
San Diego Regional Economy

San Diego Gross Regional Product

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
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<tr>
<td></td>
<td></td>
<td>4.1%</td>
<td>2.6%</td>
<td>2.2%</td>
<td>4.7%</td>
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</table>

-7.1%

Visits to restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters

Significant Impact on Taxable Sales

PRE-COVID-19

MARCH AVERAGE,
-25%

APRIL AVERAGE,
-44%

MAY AVERAGE,
-35%

2018 2019 2020 2021

Source: BEA, SANDAG estimates

San Diego Regional Economy

$200,000,000 $400,000,000 $600,000,000 $800,000,000 $1,000,000,000 $1,200,000,000 $1,400,000,000

Source: Google mobility report

Source: SANDAG
Impact of COVID-19 Pandemic and Economic Crisis

Unemployment
Population and Employment in the San Diego Region

- **Peak** (Jul-07)
- **Trough** (Mar-10)
- **Recovery** (Nov-13)

1,000,000 - 1,700,000

Great Recession
76 Months
120 Months

COVID-19 Stay Home Order

Impact of COVID-19 on Employment in the San Diego Region

March 7, 2020
3.3% Avg

May 9, 2020
25.0% Avg

June 27, 2020
14.3% Avg
Unemployment Estimates
Number of Unemployed and Rate

Unemployment Rate

Source: Applied Geographic Solutions, Inc., Thousand Oaks, California, Weekly Release July 6, 2020
San Diego Region Employment by Race and Ethnicity and Frontline Workers

Share of ethnic group in selected industries relative to their share of all employed residents

<table>
<thead>
<tr>
<th>Industry</th>
<th>Black</th>
<th>Hispanic</th>
<th>Asian</th>
<th>White</th>
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</thead>
<tbody>
<tr>
<td>Other (not frontline or high contact)</td>
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<tr>
<td>Personal Care</td>
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<tr>
<td>Food Service</td>
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<tr>
<td>Retail</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Grocery, Convenience, and Drug Stores</td>
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<td></td>
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<tr>
<td>Child Care and Social Services</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Health Care</td>
<td></td>
<td></td>
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<tr>
<td>Other frontline</td>
<td></td>
<td></td>
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</tbody>
</table>

Impact of COVID-19 Pandemic and Economic Crisis

Communities
Communities Most Impacted as of May 30
An assessment of communities most impacted by both COVID-19 cases and unemployment

- 91910 (Chula Vista N)
- 91911 (Chula Vista S)
- 91917 (Duizura)
- 91932 (Imperial Beach)
- 91950 (National City)
- 91977 (Spring Valley)
- 91978 (Rancho San Diego)
- 92020 (El Cajon)
- 92021 (El Cajon)
- 92032 (Golden Hill)
- 92105 (City Heights)
- 92113 (Logan Heights)
- 92114 (Encanto)
- 92115 (College)
- 92139 (Paradise Hills)
- 92154 (Nestor)
- 92173 (San Ysidro)
COVID-19 Cases and Estimated Unemployment by Race and Ethnicity

**Black**
- Unemployment Rate by Zip: 21.6%
- County: 0.26%
- COVID Cases as Percentage of Population by Zip: 26.1%
- County: 28.5%

**Hispanic**
- Unemployment Rate by Zip: 27.9%
- County: 0.26%
- COVID Cases as Percentage of Population by Zip: 23.1%
- County: 28.5%

**White**
- Unemployment Rate by Zip: 29.9%
- County: 0.26%
- COVID Cases as Percentage of Population by Zip: 51.9%
- County: 28.5%

**Asian**
- Unemployment Rate by Zip: 19.1%
- County: 0.26%
- COVID Cases as Percentage of Population by Zip: 48.9%
- County: 28.5%
Impact of COVID-19 and Unemployment by Race and Ethnicity in the San Diego Region

Unemployment | COVID-19 Cases | Unemployment and COVID-19 Cases

- Black: 67% | 52% | 70%
- Hispanic: 43% | 32% | 49%
- Asian: 44% | 18% | 45%
- White: 32% | 18% | 42%

Source: SANDAG Annual Estimates 2019; Applied Geographic Solutions, Inc., Thousand Oaks, California; County of San Diego, Health and Human Services Agency
Impact of COVID-19 Pandemic and Economic Crisis

Economic Sectors
San Diego Region Employment by Key Economic Sector

- **High Impact**
  - Tourism
  - Retail
  - Transportation

- **Moderate Impact**
  - Healthcare
  - Education
  - Government
  - Manufacturing

- **Low Impact**
  - Innovation
  - Military
  - Finance, Insurance, Real Estate
  - Construction

COVID-19 Impacts
- Tourism: 31%
- Retail: 37%
- Transportation: 42%
- Finance, Insurance, Real Estate: 16%
- Manufacturing: 5%
- Construction: 3%
- Innovation: 2%
Employment Sector Forecast

Supporting Sectors
- Health Care
- Education
- Government

Driving Sectors
- Tourism
- Innovation
- Military

Traditional Sectors
- Retail/Wholesale Trade
- Professional
- Construction
- Manufacturing
- Transportation & Utilities

This forecast assumes about a loss of 100,000 jobs in 2020 resulting in 9% unemployment rate

Source: CA Employment Development Department (EDD), Labor Market Information Division, Quarterly Census of Employment and Wages; SANDAG
COVID-19 Impacts to Local Industries

General Retail

- Apparel Stores
- Florists
- Furniture and Appliance Stores
- Pharmacies
- Recreation Products

Transportation

- Auto Dealers
- Auto Repair/Maintenance
- Gas Stations

Food and Beverage

- Coffee and Snack Bars
- Fast Food Restaurants
- Grocery Stores
- Sit Down Restaurants

Construction Materials

- Home and Garden Equipment Repair and Maintenance
- Home Centers/Hardware Stores

Down 35%
Down 35-40%
Down 25-45%
Up 10-15%

Source: SafeGraph COVID-19 Response Dataset - Weekly Patterns, v2
High-Contact-Intensity Occupations

337,570 High Contact-Intensity Jobs Requiring Close Contact by Sector

Healthcare – Moderate Job Loss
Most considered “essential workers” job loss in non-essential healthcare, e.g. dentistry, elective surgeries

Education – Moderate Job Loss
Technology like Zoom, enables remote learning and allows for social distancing

Transportation – High Job Loss
Airline workers, taxi drivers, chauffeurs, delivery drivers and other occupations in transportation are significantly impacted

Food & Beverage Services – High Job Loss
Restaurant and bar closures, catering companies, social events canceled, significantly impact occupations in this sector

Personal care and services – High Job Loss
Non-essential services requiring close proximity like fitness workers, childcare, nannies, barber shops, hair dressers, manicurists ordered to curtail operations.
Impact of COVID-19 Pandemic and Economic Crisis

Small Business
Impacts to Small Business in San Diego Region

Change in Revenue in the Last Week

- Decreased Revenue in the Last Week
- Increased Revenue in the Last Week

Source: U.S. Census Small Business Pulse Survey, Week Ending June 27, 2020
COVID-19 Impact on Small Business in San Diego Region

Overall, how has this business been affected by the COVID-19 pandemic?

- Large & Moderate Negative Effect: 82%
- Little to No Effect: 3%
- Large & Moderate Positive Effect: 15%
- Other: 2%

Since March 13, 2020, has this business requested financial assistance from any of the following sources?* Select all that apply:

- Paycheck Protection Program: 73%
- Economic Injury Disaster Loans: 25%
- Not requested financial assistance from any source since March 13, 2020: 20%

* Some small businesses applied for both PPP and Economic Injury Disaster Loans

Source: U.S. Census Small Business Pulse Survey, Week Ending June 27, 2020
Impact of COVID-19 Pandemic and Economic Crisis

Taxable Sales
Impact of Recessions on Taxable Sales

- 1991 Recession
- "Mild" Recession
- 2001 Recession
- "Severe" Recession
- Great Recession
- COVID-19 Recession

Down 13%
6 ½ years to recover to 2007 level

Billions of Dollars in Year of Collection
Calendar Year

COVID-19 Impact on San Diego Region
Taxable Retail Sales

<table>
<thead>
<tr>
<th>Category</th>
<th>Pre-COVID-19</th>
<th>April</th>
<th>May</th>
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</thead>
<tbody>
<tr>
<td>Business To Business</td>
<td></td>
<td></td>
<td>-57%</td>
</tr>
<tr>
<td>Restaurants</td>
<td></td>
<td>-67%</td>
<td>-54%</td>
</tr>
<tr>
<td>Other Retail</td>
<td></td>
<td>-48%</td>
<td>-24%</td>
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<tr>
<td>Auto Repairs and Sales</td>
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<tr>
<td>Construction</td>
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<tr>
<td>Department Stores</td>
<td></td>
<td>-19%</td>
<td>-28%</td>
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<tr>
<td>Service Stations</td>
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<td>-57%</td>
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<td>Apparel Stores</td>
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<td>-82%</td>
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<tr>
<td>Food Market and Liquor Stores</td>
<td></td>
<td>-14%</td>
<td>-18%</td>
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Billions of Dollars
Impact of COVID-19 Pandemic and Economic Crisis

Recovery
### Economic Recovery Outlook

#### Possible lasting effects beyond 2026
- Discouraged workers leaving the workforce
- Educational disruptions (students drop out rates)
- Less investment in the capital stock
- Existing capital less productive given restrictions
- Real Estate, Commercial Leasing

#### Shape of the recovery
- V ruled out
- Assumption: No return to “normal” until a vaccine is available
- Most Likely Scenario: V long or U long depending upon the speed at which all businesses can reopen

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Impact of COVID-19 Pandemic and Economic Crisis

Transportation
Transit Ridership

2020 decrease in ridership (compared to 2019)

- Trolley
- MTS Buses
- COASTER
- SPRINTER
- BREEZE

March April May June

March

April

May

June
Essential Workers Depend on Transit

• **20%** of people who ride transit to work have no vehicles available

• **79%** of people who ride transit to work travel 30 minutes or longer

• The median transit travel time is **51 minutes**, which is double the travel time for people who drive to work
Travel Around the San Diego Region Survey: Public Transit

• **42%** of survey respondents reported that they used transit before and after COVID-19
• **36%** said they did not use transit before and will not in the future
• **18%** did not use transit before but stated they would after a vaccine
• **4%** said they used transit before but not after COVID-19
Freeway Travel Trends

Average Decreases in Daily Traffic Volumes at Freeway Hotspots in the San Diego Region (2019 to 2020)

March - April
-27%
-43%
-42%
-50%

April - May
-42%
-40%
-33%
-31%

May - June
-29%
-25%
-23%
-21%

June - July
-20%
-17%
-16%
-18%

Source: Performance Measurement System (PeMS), Caltrans
Vehicle Miles Traveled

Percent Change VMT 2019 to 2020

Month 1: -44%
Month 2: -40%
Month 3: -30%
Month 4: -22%
Border Crossing Volumes

Northbound Pedestrian Crossings
May 2020:
-65% below monthly average (Jan 2019-Feb 2020)
increase from April 2020 to May 2020:
+44%

Northbound POV Crossings
May 2020:
-44% below monthly average (Jan 2019-Feb 2020)
increase from April 2020 to May 2020:
+17%

Note: Monthly averages are for Jan 2019-Feb 2020 period.
Travel restrictions at the border were implemented in March 2020.
Source: U.S. Customs and Border Protection (CBP)
Travel Around the San Diego Region Survey: Vehicle Travel and Telework

• **89%** reported driving less during the health crisis
  – 81% expect their vehicle travel to increase over the next six months

• **78%** reported using online shopping and delivery more
  – 42% expect to continue at a higher rate

• **48%** reported driving less for work because of telework
  – About half of those who teleworked said they saw it continuing
Employer Telework Trends During the COVID-19 Health Crisis

Of the 137 employers surveyed

55% said they have had employees who have teleworked during the COVID-19 health crisis.

When asked if they would offer telework after COVID-19

26% said yes

46% said no

28% said maybe
Employers' Future Telework Plans

When asked what percent of their workforce would continue to telework, the most common response was less than 25%

Of those companies who said they would offer telework post-COVID-19, 9% said they would offer it full-time

The most common response (71%) was to offer telework 2-3 times a week
Employers' Top 5 Reasons for Offering Telework

- Increased job satisfaction (67%)
- Productivity (55%)
- Improved work / life balance (55%)
- Helping the environment (50%)
- Cost savings in leasing commercial space (30%)
What is the Potential for Telework in the San Diego Region?

61% of occupations are not conducive to telework

64% of occupations are considered essential jobs

- 42% of essential jobs are not conducive to telework
Jobs that Can be Done at Home Typically Earn Higher Wages
Who Teleworks in San Diego Region?
Telework Targets in Regional Plans

- **Baseline**
  - Always works at home (7%)
  - Teleworks at least 1 day/week (8%)

- **2011 RP targets**
  - Always works at home (7%)
  - Teleworks at least 1 day/week (8%)

- **2015 RP targets**
  - Always works at home (7%)
  - Teleworks at least 1 day/week (8%)

- **2019 RTP targets**
  - Always works at home (7%)
  - Teleworks at least 1 day/week (8%)

- **Proposed 2021 RP targets**
  - Always works at home (7%)
  - Teleworks at least 1 day/week (8%)

*2016 Regional Transportation Study (baseline)
Broadband Connectivity and Internet Access

• **23%** of households earning less than $50,000/year do not have a broadband subscription

• **20 – 40%** of students in many local districts are under-connected or lack home internet access

• **42%** of people who live in the County’s rural areas have fixed internet, versus **97%** of the people who live in urban areas
Travel Around the San Diego Region Survey: Active Transportation

• **14%** are biking more
  – 85% will continue biking more for recreation, exercise, shopping, and errands

• **50%** are walking more
  – 82% will continue walking more for recreation, exercise, shopping, and errands
Cycling on the Rise in the Region

- **91%** increase in bike volumes on eight regional bikeway corridors
- Data collected May 2020 and compared to May 2019 volumes

Source: SANDAG Eco-Counters
Cycling on the Rise in the Region

San Marcos Inland Rail Trail +211%
Solana Beach Coast Highway +109%
Rose Canyon Bike Path +107%
Chula Vista Bayshore Bikeway +158%

University Avenue +88%
4th & 5th Avenues +63%
Landis Street +52%
30th Street +54%

Source: SANDAG Eco-Counters
Shared Streets

• SANDAG Shared Streets Pilot Program awarded $95,000 to 11 jurisdictions to create safe spaces for biking, walking, scooting, and more
Toward a more inclusive, sustainable and resilient economy and society
This relates to Item No. 12
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