The following report is a deep dive into how Snapchatters are using AR in Japan based on the Snap Consumer AR Global Report.

For a more comprehensive market view, please read the Snap Consumer AR Global Report.
Table of Contents

01 Introduction
AR is a critical tool for brands to stand out and deliver customer value and confidence.

02 AR’s Impact on Brands
AR is the next form of mobile engagement, elevating the consumer experience and setting new expectations for digital engagement.

03 AR is Evolving Fast
AR is already here, widely recognized as both fun and useful and driving fast adoption and growth.

04 AR is Here Today and Here to Stay
AR cannot be ignored as the new, rapidly-growing consumer experience that will soon be everywhere, all the time.

05 Conclusion
There is an imperative to meet consumer’s AR demand, and now is the time to act for brands, platforms, and developers.
Introduction
Key Takeaways

AR adoption is tracking with the mobile usage boom - by 2025, over 65% of the Japan population and almost all people who use social / communication apps will be frequent AR users.1

77% of people successfully identify AR when they see it, but when talking about it, they have a hard time defining or describing what it is.

62% of Snapchatters in Japan and across generations use AR to have fun; the majority are discovering AR through social / communications apps.3

AR is generally seen as a “toy”, but 82% of people expect and desire to use it as a practical “tool” in their everyday lives.4

Interacting with products that have AR experiences leads to a 94% higher conversion rate.5

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1. See additional methodology details in appendix.
2. 2021 Global Digital Lifestyle Study commissioned by Snap Inc.
3. Base = Snapchatters (n=319)
4. 2021 Global Digital Lifestyle Study commissioned by Snap Inc.
5. Harvard Business Review Article, “How AR is Redeeming Retail in the Pandemic”
There is something really unique happening right now – an incredible number of hobbyists and professionals are using AR. Downloading tools across the Snap AR platform. They’re taking time to learn, they’re curious.”

AR is growing

By 2025, over 65% of the Japan population* and almost all people who use social / communication apps will be frequent AR users.¹

Frequent AR Consumers

Based on people ages 13-69 who use social / communication apps

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¹ See additional methodology details in appendix

*Global population includes people ages 13-69 (based on UN World Population Prospects 2019)

Note: 2021 AR Consumers based on people who use AR weekly or daily from 2021 Global Deloitte Digital Study commissioned by Snap Inc.

2024 to 2025 forecasted to be the 2000/2003 growth rate of smartphone users since AR is in the Toy phase of adoption. For look at when this transition took place with mobile phones, one can argue that was when games like ‘snake’ started being available (e.g., 1997: Nokia 6110 device released, 1999: emojis were invented, 2000: Nokia 3310 launched, and the first commercially available camera phone launched in Japan).
Younger generations and Snapchatters are driving AR growth

**Age Differences**

Younger people are **22% more likely** to use AR than older generations.¹

Snapchatters are **2.7x as likely** to use AR frequently compared to Non-Snapchatters.³

**69%** of Snapchatters believe AR is important to their lives.⁴

But, AR is not just for Gen Z; **Millennials and Gen X show the highest affinity for AR.²**

1. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
2. QP7A: Thinking about your expected use of AR technology post-COVID, do you expect to start using AR? Please select one response
3. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
4. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
As AR evolves, it will revolutionize our lives and will become as significant of a technology shift as the web or mobile was to society, changing how we view and interact with the world around us.”
AR’s Impact on Brands
A lot of people are using AR to make purchase decisions... and plan to keep doing so.

There are 100 million consumers shopping with AR online and in-stores.¹

93% of Snapchatters agree they’ll use AR the same or more when shopping next year.²

¹ Gartner, “The Role of AR in Consumer Engagement,” 2021
² 2021 Global Deloitte Digital Study commissioned by Snap Inc.
AR captures consumer attention

AR delivers almost **2x** the levels of visual attention compared to their non-AR equivalent, leading to improved memories and more powerful responses from consumers.¹

Snapchatters who frequently use AR with their family and friends are **68% more likely** to pay attention to a brand.²

¹: Zappar, Article, “How augmented reality affects the brain.”
²: 2021 Global Deloitte Digital Study commissioned by Snap Inc.

Base = Snapchatters with over 60% of friends and family sharing AR (n=55), Snapchatters with less than 40% of friends and family sharing AR (n=57)

Q: How many of your friends and family do you think use AR today?
Q: Sometimes brands will create AR experiences through an app camera (e.g., a big movie company makes an AR experience where the heroes of a movie are fighting next to you, or a restaurant provides you a lens/filter/effect that turns you into a hamburger). What impact, if any, does interacting with that AR experience have on your perception of that brand?
Brands and people connect better with AR experiences

44% more likely to be considered if they have a branded AR experience.\(^1\)

Snapchatters are 27% more likely than Non-Snapchatters to share a brand’s AR experience with friends and family.\(^2\)
AR builds consumer confidence

73% of Snapchatter shoppers agree that AR gives them more confidence about product quality.¹

Over half of people want to use AR technology to assess products, allowing for a risk-free, “try-before you buy”, experience.²

Nearly 3 in 4 consumers say they’re willing to pay more for a product that promises the total transparency that AR can provide.³

Returns are a $550 billion problem, which AR can help fix. AR-guided purchases led to a 25% decrease in returns.⁴

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=379)
² NielsenIQ Analysis, Augmented retail: The new consumer reality
³ 2016 Label Insight Transparency ROI Study via Inc.
⁴ ARInsider Article, “Does AR Really Reduce eCommerce Returns?”
The results are in 🎼
AR interactions drive conversion

The conversion rate of our lens product was very high with 62% of those who used AR lens ending up buying a product.”

Alice Bezirard-Fischer
Communications Lead
Wella

Interacting with products that have AR experiences leads to a higher conversion rate, as individuals can better assess them and feel connected with brands.¹

Snapchatters are 44% more likely to purchase products through a brand’s website than Non-Snapchatters.²

¹ Harvard Business Review. “How AR is Redeﬁning Retail in the Pandemic.”
² 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=260), Non-Snapchatters (n=167)

Q: Sometimes brands will create AR experiences through an app camera (e.g., a big movie company makes an AR experience where the heroes of a movie are ﬁghting next to you, or a restaurant provides you a lens/ﬁlter/effect that turns you into a hamburger). What impact, if any, does interacting with that AR experience have on your perception of their brand? A: I am more likely to purchase their products through the brand’s website.
AR connections drive revenue

Consumers who view AR as a social activity are **46% more likely** to purchase products from the brand.¹

- Snapchatters are **132% more likely** than Non-Snapchatters to use AR to connect with others.²
- Snapchatters share AR photos and videos with friends and/or family **175% more** than Non-Snapchatters.³

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = AR is a group activity – Agree much more with (n=77), Aggregate (n=389)
Q: AR is a group activity / AR is a solo activity | A: Agree much more with A

2: Base = Snapchatters (n=182), Non-Snapchatters (n=106)
Q: Why do you use AR?

3: Base = Snapchatters (n=170), Non-Snapchatters (n=84)
Q: How often do you capture or share photos and videos with your friends and/or family? | A: Several times each day
AR is Evolving Fast
Almost 70 Million AR photos and/or videos are taken daily by consumers. AR use will grow with an increase in awareness and access to AR experiences and content.

On Snapchat, there are 500 million minutes of AR playtime per day on average.

AR Photos / Videos Per Day
Generational Breakout of Daily AR Photos / Videos Created

2021-2025 CAGR of AR Photos / Videos per Day

+40%

1. See additional methodology details in appendix. CAGR: 4-year compounded annual growth rate that measures the annual increase in AR Photos/ Videos per day from 2021 to 2025
2. Snap Inc. internal data Q1 2020.
AR is Here
Today and
Here to Stay
Where do Snapchatters use AR most today?

64% of consumers use AR primarily in their homes.¹

Consumers predominantly use AR at home and do so for a wide range of uses.

What are Snapchatters using AR for at home?²

- **68%** Communication
- **48%** Media & Entertainment
- **54%** Gaming
- **40%** Shopping

Today’s use cases most align with activities you would do at home, and 53% of Snapchatters say they will use AR at home more than last year.³

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1. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
   Base = Aggregate (n=722)

2. 2021 Global Deloitte Digital Study commissioned by Snap Inc.

3. Across all 15 markets, the 2021 Global Digital Study commissioned by Snap Inc in April, 2021 to May 2021.

Note: Across all 15 markets, for the 2021 Global Deloitte Digital Study commissioned by Snap Inc in April 23, 2021 to April 3, 2021, survey the survey was conducted during the COVID-19 pandemic: primary range of AR consumers’ homes may be higher than normal.
How are Snapchatters learning about AR?

79%

learn about AR from social / communication channels and networking.¹

Frequent AR users are more likely to have over 50% of their friends and family using AR.²

Snapchatters are 90% more likely to discover AR by seeing celebrities / influencers use it on social media, communication, and camera apps.³
### Why do they use AR?

<table>
<thead>
<tr>
<th>TECH:</th>
<th>OSMOSIS</th>
<th>“I didn’t even realize I was using it”</th>
</tr>
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<tbody>
<tr>
<td>TOY:</td>
<td>JOY</td>
<td>“I want to have fun and connect with friends”</td>
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<tr>
<td>TOOL:</td>
<td>UTILITY</td>
<td>“I need to and it’s useful”</td>
</tr>
<tr>
<td>TOTALITY:</td>
<td>UBIQUITY</td>
<td>“It’s everywhere and commonplace”</td>
</tr>
</tbody>
</table>
What are people using AR for, today?

**Communication**
- 72% use
- 25% to be more creative

**Gaming**
- 57% use
- 32% to make gameplay more interactive

**Media**
- 52% use

**Shopping**
- 46% use

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Snapchatters frequently use AR for communication (+182%) and gaming (+210%) more than Non-Snapchatters.9

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1: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=878)
Q: Frequency of Use by Reason: Communication | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month
2: Base = Snapchatters (n=555)
Q: Frequency of Use by Reason: Gaming | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month
3: Base = Snapchatters (n=637)
Q: Frequency of Use by Reason: Media | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month
4: Base = Snapchatters (n=691)
Q: Frequency of Use by Reason: Shopping | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month
5: Base = Snapchatters (n=158)
Q: How does AR impact your communication experience?
6: Base = Snapchatters (n=164)
Q: How does AR impact your gaming experience?
7: Base = Snapchatters (n=293)
Q: How does AR impact your entertainment experience?
8: Base = Snapchatters (n=239)
Q: How does AR impact your browsing and/or shopping experience?
9: Base = Snapchatters – Communication (n=161), Non-Snapchatters – Communication (n=69), Snapchatters – Gaming (n=169), Non-Snapchatters – Gaming (n=68)
Q: How often do you use AR when connecting with friends and family?
Q: How often do you use each type of AR when gaming? – Social media, communication, and camera apps that have AR games? – A few times a week, Several times a week, Once a week, A few times a month, Once a month
Q: How often do you use each type of AR when shopping?
Q: How often do you use each type of AR when playing video games?
What are shoppers using AR for, today?\(^1\)

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Used AR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
<td>68%</td>
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<tr>
<td>Entertainment</td>
<td>67%</td>
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<tr>
<td>Beauty and Wellness</td>
<td>64%</td>
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<tr>
<td>Telecommunications</td>
<td>64%</td>
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<tr>
<td>Restaurant &amp; Food Delivery</td>
<td>54%</td>
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<tr>
<td>Travel</td>
<td>57%</td>
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<tr>
<td>Household goods</td>
<td>54%</td>
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<tr>
<td>Automotive</td>
<td>47%</td>
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<tr>
<td>Home Décor</td>
<td>62%</td>
</tr>
</tbody>
</table>

1. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
   Base: Aggregate - Retail (n=376), Beauty and wellness (n=351), Household goods (n=296), Telecommunications (n=351), Restaurants and food delivery (n=297), Entertainment (n=370), Home decor (n=343), Automotive (n=261), Travel (n=314)

Q: AR Shopping Categories | A: Total Used AR
What are Snapchatter shoppers using AR for, today?¹

AR is a natural extension of the shopping experience, aiding in decision making

- 65% of shoppers are likely to use AR when they come across it²
- 40% help shoppers decide what to buy³
- 34% discovered it as part of browsing or shopping¹

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
²: Base = Aggregate (n=357)
³: Base = Aggregate (n=222)

Questions:
1. How have you found AR while browsing and/or shopping?
2. If you come across AR while browsing and/or shopping, how likely are you to try it? (Somewhat/Very Likely)
3. How does AR impact your browsing and/or shopping experience?
4 in 5 consumers believe that AR will be even more important in their lives in the next 5 years.¹

Next year, Snapchatters plan on using AR more in 4 key growth areas.

- **Shopping**²: 62%
- **Gaming**³: 55%
- **Media**⁴: 53%
- **Communications**⁵: 42%

- **57%** want to readily view information about an item or product as soon as it’s scanned with the phone camera.⁶
- **43%** want to project their AR avatar into their favorite games, media & entertainment.⁸
- **35%** want to create their own interactive media plots by guiding characters through a script.⁹
- **34%** want to customize environments to their own imagination and share with others.⁶

¹ 2021 Global Deloitte Study commissioned by Snap Inc. Base = Aggregate (n=798)
² Q: How useful and/or important do you think AR will be in 5 years? | A: Very useful / important, Somewhat useful / important
³ Q: Will you use AR while browsing and/or shopping more or less than last year?
⁴ Q: How would you like to use AR in the next year to enhance the way you view sports, concerts, movies, and TV?
⁵ Q: How do you feel about AR on social media, communication, and camera apps? | A: I want more ways to interact with friends and family using AR
⁶ Q: Will you use AR in gaming more or less than last year?
⁷ Q: How want to use AR in the next year to enhance the way you view sports, concerts, movies, and TV?
⁸ Q: How do you feel about AR on social media, communication, and camera apps? | A: I want more ways to interact with friends and family using AR
⁹ Q: Will you use AR in gaming more or less than last year?
Utility is a primary driver for future AR usage

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.

Base = Why use AR - Wellness (n=193), Improve Productivity (n=207), Instructions (n=248), Learn something new (n=295), TV & Sports (n=325), Navigation (n=321), Improve Shopping (n=333) | Desire for more AR use - Wellness (n=278), Improve Productivity (n=321), Instructions (n=380), Learn something new (n=426), TV & Sports (n=363), Navigation (n=477), Improve Shopping (n=449)

Q: Why use AR

- Navigation: 48%
- Wellness: 44%
- Improve Productivity: 55%
- Learn Something New: 44%
- Instructions: 53%
- Improve Shopping: 35%
- TV & Sports: 11%

Q: Desire for more AR use

- Navigation: 55%
- Wellness: 44%
- Improve Productivity: 48%
Snapchatters are 2x as likely to be AR creators.\(^3\)

80%  
Snapchatters

vs.

40%  
Non-Snapchatters

Consumers are becoming creators

Everyday consumers have more access to technology tools that enable them to be creators of digital content.

AR is a creative vehicle

55% believe AR allows them to be more creative.\(^1\)

57% believe they are AR creators in their everyday lives.\(^2\)

Snapchatters are 2x as likely to be AR creators.\(^3\)

Snapchatters

40% have used tools to create AR.

Non-Snapchatters

\(^1\) 2021 Global Deloitte Study commissioned by Snap Inc.  
\(^2\) Base = Aggregate (n=690), Snapchatters (n=412), Non-Snapchatters (n=278)  
\(^3\) 2021 Global Deloitte Study commissioned by Snap Inc.
“Consumers are now seeing [AR] as a bilateral conversation and as a production tool to create new content; now consumers can edit their environment and transport themselves where they want to be.”
Conclusion

Consumers continuously expect more personalized and engaging experiences that enable them to interact with the world. **AR is delivering that to consumers, today, but there remains untapped potential for so much more.**

Brands know the consumer appetite for AR is already here – consumers are far more likely to pay attention to brands using AR. **There is a content imperative for brands to meet consumers AR demand, and now is the time to meet this demand. Brands that meet the demand for AR experiences may be more likely to gain market share in the future.**

The convergence of use cases and the networking effects is expediting AR adoption. But to unlock AR’s potential, **brands, developers, and platforms need to work together to accelerate content development and grow the AR ecosystem.**
Thank you
Appendix
Consumers are redefining the digital experience by using AR.

Augmented Reality (AR) is the next form of mobile engagement that is exciting consumers, driving an enhanced engagement with brands, elevating consumer experiences and increasing brand revenues.

Augmented Reality refers to experiences in which the real-world environment seen through your phone, computer, app camera, or an AR headset is altered or enhanced with the addition of images, objects, text, or other digitally-added information. Augmented Reality could be applied to both visuals of the front facing (selfie) and outward facing (world) cameras.
Research Overview

Japan Report, Quantitative Online Survey

- 20-minute online survey among 15,000 international respondents
- Survey in field from February 23, 2021 – April 5, 2021

Alignment with Interdisciplinary Experts

- Experts within the AR industry participated in in-depth interviews to provide context for survey findings and contribute guidance on the future of AR in society.

Respondent Qualification

- n=1000 per market
  - Ages 13-50
  - 500 Snapchatters who use Snapchat at least once daily, split evenly amongst age groups 13-17, 18-24, and 25-50
  - To ensure a representative read on Snapchatters, cell weighting based on nested gender and age were applied to each country to correct for demographic imbalances due to set sampling size.
  - 500 Non-Snapchatters, who do not have Snapchat downloaded/have never heard of Snapchat, minimum of N=100 in all three age groups
- Markets: Australia, Canada, France, Germany, India, Japan, Malaysia, Mexico, The Netherlands, Norway, Saudi Arabia, Sweden, United Arab Emirates, United States, United Kingdom

Local Market Additions and Exceptions

- US: Ethnicity quota (maximum 65% white respondents, maintained only for Snapchatters; Non-Snapchatters sample should be roughly nationally representative)
- KSA and UAE: Representative expat / citizen quotas (88% expat in UAE; 30% expat in KSA for both Snapchatters and Non-Snapchatters).
- Norway: Sample recruited for n=1000 to be representative of social media and communication app users in that market, with a skew on ages reflective of other markets (evenly distributed across 13-17, 18-24, and 25-50)
- Japan: Sample recruited for n=1000 to be representative of smartphone users in that market, with a skew on ages reflective of other markets (evenly distributed across 13-17, 18-24, and 25-50)
Frequent AR Users Methodology

2021 Baseline

**Frequent AR Users**

People who use AR weekly or daily based on responses to 2021 Global Deloitte Digital Study commissioned by Snap Inc.¹ and extrapolated to population.

**Population Base**

2021 Global Population Base: People ages 13-69 = 5.61B worldwide in 2020²
2021 Social and Communications App Population Base: Global Population x Social Media Penetration Rate (48% in 2021)³ = 2.71B

Note: Assumes no increase or decrease in population. Base from 2021 stays same across five years.

**AR Adoption Rate**

AR Adoption Rate of Total Population
AR Adoption Rate of Social and Comms App Population

Note: Adoption Rate capped at 100% in out years.

2022-2025 Forecast

**2022 Baseline**

See above

**2000 Growth Rate of Smartphone Users**

Note: 2021 AR Users is at 1999 smartphone user’s adoption level since AR is in the Toy-phase of adoption; if we look at where this transition took place with mobile phones, one can argue that this was when games like ‘snake’ started being available (e.g., 1997: Nokia 6110 device released, 1999: emojis were invented, 2000: Nokia 3310 launched, and the first commercially available camera phone launched in Japan).

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
³: Statista Global Social Network Penetration 2017-2025
**AR Photos / Videos per Day Methodology**

Overall: Calculations were done by age groups in the 2021 Global Deloitte Digital Study commissioned by Snap Inc. and netted up into a generational view. The following methodology was used for each age group (Ages: 13-17, Ages 18-24, Ages: 25-34, Ages: 35-44, Ages: 45-50)

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### 2021 and 2022 Baselines

<table>
<thead>
<tr>
<th>Step 1: Determine Global Population for ages 10-69 (5.99B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note: Survey only included Ages 13-50. Ages 10-12 were assumed to have similar behavior to Ages 13-17. Ages 51-69 were assumed to have similar behavior to Ages 45-50.</td>
</tr>
</tbody>
</table>

| Step 2: Determine percent of people within crosstab of survey questions for Frequency of photos and/or videos taken daily AND % of photos and/or videos that are AR. 2021 based on responses to behaviors today. 2022 based on responses to behaviors next year. |

| Step 3: Apply percent of population from Step 2 to population to get number of people within each crosstab |

### Daily AR Photos and/or Videos

<table>
<thead>
<tr>
<th>Step 1: Take annual AR photos and or videos and divide by 365 to get daily AR photos and or videos by age group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2: Add all age groups to get total daily AR photos and or videos</td>
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</tbody>
</table>

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### 2023-2025 Forecast

<table>
<thead>
<tr>
<th>2022 Baseline</th>
<th>2007 Growth Rate of Smartphone Device Sales</th>
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</thead>
<tbody>
<tr>
<td>Note: Device growth is used as a proxy for photos/videos growth. Growth rate assumes 2007 smartphone device growth. As of 2021, there are ~1.05B AR Compatible Devices: ARCore (Android) + ARKit (iOS). If this grows at global smartphone growth equivalent, there could be ~4.1B by 2025</td>
<td></td>
</tr>
</tbody>
</table>

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2. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
3. AR Insider Article, “ARCore Reaches 400 Million Devices”
4. Statista Research, “Augmented reality (AR) and virtual reality (VR) headset shipments worldwide 2020-2025”
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<tr>
<th>First Name</th>
<th>Last Name</th>
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