# 9. Qualitative research in demography: marginal and marginalised<sup>1</sup>

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### INTRODUCTION

Demography, as a discipline, developed from a desire to understand human population dynamics (e.g., Graunt's Bills of Mortality in the seventeenth century (Glass, 1964), the works of Thomas Malthus (Wrigley and Souden, 1986)) and the development of the modern nation-state, which required counting people in order to administer and control them (Foucault, 2003; Legg, 2005). The discipline retains a close relationship with governance and policy, particularly through quantitative administrative data (e.g., censuses), which are key sources for demographic analysis. Quantitative data are fundamental to demography: population-level dynamics can only be expressed through quantitative means.

With a few notable exceptions (Cicourel, 1974), there was little qualitative demographic research before the 1980s. Assumptions in qualitative methods that 'facts' are socially constructed and vary from person to person are counter to objectivist approaches in quantitative demography. The latter has historically been represented as atheoretical, while the former critiqued for its reliance on theory. Yet this is a false binary – to be positivist and objectivist is to make theoretical assumptions of the nature of the answers to survey questions. The emergence of qualitative methods within demography has challenged this, with qualitative work highlighting that the answers to 'simple' questions, such as how many living children a person has, are, in fact, complex and socially and culturally shaped.

### DISCIPLINARY ORIGINS AND TRADITIONS

During the eighteenth and nineteenth centuries, colonial European census administrators incorporated approaches that could be thought of as 'qualitative research', although it was not articulated as such. The control and governance

of people living under colonial regimes meant that censuses – with their focus on complete enumeration – were sometimes informed by colonial administrators' understandings of residential and marriage patterns, and vocabulary to define and explain the units of data collection (Randall et al., 2015). However, as demographic data collection became more standardised and harmonised during the 1960s and 1970s, more demographers were trained, both from the Global South and Global North. Whatever their geographic origins, these demographers were trained in the Global North – or in Global South schools which followed these standardised paradigms, methods and definitions. Representativity and comparability were, and remain, key dimensions of these paradigms, and locally informed definitions and concepts were discarded in favour of UN sanctioned universal definitions.

Overlaps between anthropological and demographic interests (reproduction, birth, family, marriage, migration) meant that some demographers acknowledged the relevance of anthropological insights for demography. Anthropological demography, however, tended to be dominated by anthropologists, trained in anthropological methods, theory and epistemology tackling themes which were of interest to demography. Some demographers (e.g., Jack Caldwell), eagerly embraced the integration of anthropological ideas into demographic research, although demography's simplistic approach and functionalist vision of anthropology was criticised by many anthropologists: 'the use of "culture" in demography seems mired in structural-functional concepts that are about 40 years old, hardening rapidly, and showing every sign of fossilization' (Hammel, 1990: 456).

Professional societies reflected the growing interest in the intersections of demography and anthropology. The International Union for the Scientific Study of Population (IUSSP) set up a working group on Micro-approaches to Demographic Research in 1982. Two years later, they convened a workshop on 'Micro-approaches to demographic research' (Caldwell, Hill, and Hull, 1988) that brought together early career researchers whose work integrated anthropology and demography, many of whom went on to pioneer anthropological demography and qualitative demographic research. Other initiatives included the IUSSP Committee on Anthropological Demography (1998–2002) and in the early 2000s the European Association of Population Studies (EAPS) hosted a Working Group on Anthropological Demography (Bernardi and Hutter, 2007). The rapid increase in qualitative demographic data collection and research since the late 1990s is evidenced by analysis of key words in abstracts in mainstream demographic journals (Randall and Koppenhaver, 2004).

This has accelerated more recently with the development and use of different qualitative methods, which battle to be acceptable to the demands for representative and comparable data by quantitative demography. Recent

demographic conferences have reflected this in the uptick of qualitative strands, including 'Qualitative demographic research: Challenging paradigms' at the British Society for Population Studies Conference, 2021 (British Society of Population Studies, 2021), and 'Sex, Childbearing, and Qualitative Perspectives' at the Population Association of America Conference, 2021 (Population Association of America, 2021).

### WHAT ARE DEMOGRAPHIC 'FACTS'?

As cogent disciplines like Sociology and Economics grapple with the 'critical turn' in their fields, there have been recent efforts to interrogate and reckon with some of the assumptions and ideas underpinning demographic work. Chatterjee and Riley (2018: 38) critique demography's 'facticity of numbers' – a reliance on the 'facts' of its 'objective' numerical data. Others have described this penchant as 'spreadsheet demography' – where human beings are treated as 'units' in demographic exercises, overlooking sociological meanings and lacking critical self-reflection (Wang, Cai, Shen, and Gietel-Basten, 2018: 694–695).

Within this 'critical turn', efforts like FemQuant (2021), a network of researchers drawing on feminist theories in their quantitative work, consider demographic knowledge production as political and mired in power. Drawing on the germinal theory of intersectionality (Crenshaw, 1989), Bauer (2014) and Green (2020), for example, demonstrate how it can be incorporated into quantitative population research without falling into an 'additive' trap.

These critical turns underscore the importance of theory in demography as necessary to social science research and to enriching the discipline (Krieger, 2001; Williams, 2010). They also highlight that quantitative demographic data are no longer convincingly atheoretical nor apolitical (Horton, 1999; Sigle, 2016). Critical qualitative demographic research has challenged understandings of assumed universal or static notions (e.g., populations, households, fertility desires), highlighted persistent silences (e.g., infertility, men's roles in reproduction), and problematised concepts (e.g., autonomy) and their implications for policy constructions (e.g., population policies) and analytical categories (e.g., categorical thinking).

# SITUATING THE QUANTITATIVE-QUALITATIVE PARADIGM IN DEMOGRAPHY

Greenhalgh (1997) argues that the role of qualitative approaches is not just methodological but also one of disciplinarity and how knowledge is produced and utilised. Qualitative methods in anthropology and demography, for example, may be similar (e.g., interviews, focus group discussions) but their

use, understanding, and meaning differ between disciplines. Methods and their units of inquiry are linked to disciplinary priorities and frames. Qualitative methods when applied more critically in disciplines like Gender Studies, Sociology or Anthropology pay particular attention to 'power' and its many permutations, in addition to questioning and/or critiquing how knowledge is produced (see Chapters 3, 4 and 12 in this volume). Demographic work – at the risk of generalising – largely shies away from grappling with questions of power, despite a keen interest in measuring and documenting demographic inequalities.

Despite the inclusion of qualitative research within demography, there has been an adherence to and strengthening of the centrality of quantitative research. Disciplinary backgrounds play a key role in shaping data and analytic approaches. Comparability is a core demographic value (Coast, Fanghanel, Lelievre, and Randall, 2016), reflected in the value for demography of national population censuses, which are the 'most visible, and arguably the most politically important, means by which states statistically depict collective identities' (Kertzer and Arel, 2002: 3).

Quantitative surveys – often household-based – are a critical source of data for demographic analyses. Demographic research and its funding tend to privilege tools and instruments that allow for cross-contextual comparison. Harmonised surveys have been used to create global data, operationalised on the assumption that the global population can be measured, understood and explained using the same indicators. Such datasets are valued for their ability to achieve 'representativeness', allowing for claims and inferences to be made that are 'generalisable' to an entire population.

These questionnaires and surveys – used to collect much demographic data – have become increasingly complex, elaborate and detailed. Demographic knowledge and evidence on population (fertility, mortality, migration and distribution) underpins much policy planning and agenda setting, confirming demography as a 'policy science' (Hodgson, 1983). A combination of drivers has led to qualitative methods: intractable problems or apparently inexplicable relationships identified by quantitative analyses; increasing demands to use data as a tool to effect change (desirable to those with power); and the imperative to understand the demography of people who might either avoid or be excluded from responding to large-scale data collection exercises. Qualitative methods and data have challenged the quantitative paradigm, including the questions asked, and the constraints, biases and consequences generated by the categories used in demographic research (Szreter, Sholkamy, and Dharmalingam, 2004; Randall and Coast, 2015).

# SPEAKING FROM THE MARGINS: QUALITATIVE RESEARCH

Demography tends to focus on the production of robust and reliable scientific evidence, with little reflexive engagement in its own scientific project. The strength of the quantitative data commodity chain in demography often renders qualitative research marginal (Erikson, 2012; Béhague and Storeng, 2013; Storeng and Béhague, 2017a). Quality standards and analytic expectations of mainstream qualitative methods (e.g., in-depth interviews, focus group discussions) are not tethered to notions of sub-/national representativeness or statistical generalisability. Rather, they rely on the assumption that people are not comparable but are unique and are shaped through their social interactions, constructing intersecting and diverging ways of thinking and knowing. Thus, their use in demography can play a dual role, where they are critical *to* demography whilst also being critical *of* demography.

The disciplinary focus on understanding and counting populations has been strengthened by the increased sophistication and scale of quantitative survey techniques (Erikson, 2012; Béhague and Storeng, 2013; Storeng and Béhague, 2017a). The resulting epistemological tension has limited qualitative research in demography to three main uses. First, qualitative data and methods are treated as ancillary to quantitative research and methods, often utilised to 'set the scene' or inform the development of quantitative instruments. Second, they are used to explain outlying quantitative results or trends beyond the scope of quantitative explanation. Third, they can be seen as a mechanism to reach those made marginal in society, particularly hard to reach and hidden populations, who are frequently excluded from or invisible within large-scale quantitative enquiries.

Qualitative data are often posited as ancillary to quantitative data within demographic research. Pushed to the margins, these data and the methods used to gather them are frequently applied either to describe the context of a survey, or to critique methods conventionally used to gather quantitative data. Ethnographic methods and data rooted in constructionist, qualitative epistemologies form the foundations of qualitative disciplines such as Anthropology (see also Chapters 3 and 4 in this volume). Within demography, ethnographies are often limited to being used as evidence to inform the creation of survey tools or describe the context of a quantitative study (Coast, 2003). By placing qualitative methods and data on the margins, demography limits the development of these methods, and is ill-equipped to grapple with the material, words, representations and relationships that are generated. This can result in an uncritical use of qualitative data to inform quantitative inquiry, without con-

sidering what the qualitative data and methods might be (re)producing because of the assumptions, methods and analytical framework applied.

Moreover, qualitative research is frequently used to explain components of population dynamics that are made inexplicable through quantitative analysis (Randall and Koppenhaver, 2004; Coast, Hampshire, and Randall, 2007). Where unexpected or inexplicable responses or trends are uncovered, qualitative research is used to supplement or explain away these findings. Demography tends towards removing or marking these incongruities or outlying trends as erroneous, as opposed to mapping the margins of data to understand the social, political and economic factors at play. Recent focus on the role of gender in fertility, for example, has led to an increased reliance on the role of qualitative data to counter the limitations of quantitative data in capturing complex, gendered realities (Schatz, 2003). Difficulties in constructing a category of gender have meant that quantitative data have been limited in understanding the relationships between gendered dynamics and fertility behaviours, with researchers predominantly using qualitative data to complement quantitative data (Schatz, 2003).

The origins of demography as a discipline to 'count' cannot be separated from the deeply politicised nature of 'counting populations', one that historically threatened marginalised and oppressed communities with state violence (Randall, National Research Council, and Committee on Population, 2004). These realities can create populations who are either hard to reach due to ongoing marginalisation, and/or who make themselves less visible to avoid interaction with potential state mechanisms of population counting (Sydor, 2013; Bonevski et al., 2014; Randall, 2015; Rockliffe, Chorley, Marlow, and Forster, 2018). Where quantitative surveys and questionnaires exclude particular populations, or address complex or sensitive topics, qualitative methods are often treated as an alternate approach. This is due to the more culturally appropriate, contextually sensitive and iterated possibilities of qualitative methods, able to respond to the needs and desires of research participants.

# DEMOGRAPHIC AND HEALTH SURVEYS: A CRITICAL CASE STUDY

The Demographic and Health Survey (DHS) is a useful case study in understanding how demography as a discipline has approached and privileged quantitative data. The DHS contributes to understandings of trends, patterns and behaviours by providing evidence for comparative (time and space) demographic studies. Such 'objective' surveys with supposedly value-neutral frames can be interpreted as extending demographic surveillance and governance (Chatterjee and Riley, 2018). The DHS and other quantitative data are

central to policy formulation and governance efforts (Casterline and Sinding, 2000; The DHS Program, 2020c).

DHS data are collected via four model questionnaires, and the structure of these questionnaires assumes that emotional and deeply personal experiences and events (e.g., births, pregnancy loss, sexual intercourse, circumcision) or questions asking for 'justifications' (e.g., for hitting or beating partners, refusal of sex) can be categorised in legible ways (e.g., treating 'depends/not sure' as meaningfully the same response), overlooking the complexity of peoples' lives that are not so easily countable, enumerated, or ranked (Chatterjee and Riley, 2018; The DHS Program, 2020a, 2020b; Strong, 2021). Many of these topics are also stigmatised, with implications for both interviewer effects and willingness to disclose, shaping the kinds and quality of demographic data available (Leone, Sochas, and Coast, 2021).

Analysing the gendered nature of the DHS, as well as the categorisation of gender, gives insight into the assumptions and subjectivity that drives 'objectivist' survey data. Gender, rather than a static category, is a social phenomenon and is continuously (re)produced through interactions, exchanges and practices (Connell, 1987). Demography – until fairly recently (see Riley, 1998; Agadjanian, 2006; Williams, 2010; Fennell, 2011) – has largely focused on sex categories even when some of the behaviours and actions it focuses on are better served by attention to gender and gendered relations (Riley, 1997). Focusing on fertility – without specifically conceptualising and acknowledging it as mainly women's bodies that experience interventions such as modern contraceptive methods – 'de-genderizes' (Presser, 1997: 298) the data, which in turn impacts policy and practice. By doing so it avoids entanglements with intersectional power relations of gender, class, race or caste (or other markers) and how it shapes and structures women's reproductive autonomies and agencies.

Herein lies the major tension for qualitative demography. Quantitative demography is predicated upon comparability and representativity – yet anthropological and qualitative research consistently shows that different social groups are frequently not directly comparable (Randall, 2020): they have different living arrangements, different priorities, use language in diverse ways that cannot always be translated, have different value systems, different power relations and so on. Differences permeate the social world and qualitative demographic research can go some way to challenging interpretations based on quantifiable data, understanding and interpreting findings and contributing to developing theory and policy.

# METHODS OF QUALITATIVE RESEARCH IN DEMOGRAPHY

The increasing use of qualitative research in demography has been driven primarily by in-depth interviews, focus group discussions and life histories. These form the bulwark of methods that were operationalised to grapple with more nuanced and complex research, with an increasing proportion of studies using either one or a combination of these methods from the 1990s onwards (Randall and Koppenhaver, 2004). These methods remain popular within demography, in part due to their ability to allow for larger sample sizes, thereby grappling with demographic privileging of 'representativeness' and 'generalisability' within research. These methods have allowed for a greater exploration of people's experiences of births, deaths and migration, and are able to grapple directly with issues deemed 'sensitive' (Coast et al., 2007).

Qualitative demographic research has also enabled the study of stigmatised behaviours (e.g., abortion) or made-marginalised populations (e.g., sex workers) or linked to illegal or taboo activities (e.g., injecting drug users). In this context a much wider portfolio of methods has developed: photovoice, field journals, diaries, interviews, life histories, body mapping. Such studies have enriched understanding and approaches. They have contributed not just descriptive or predictive frameworks, but explanatory or theoretical ones, sharpening both qualitative and quantitative methods in the discipline (Riley and McCarthy, 2003; Fisher, 2006; Coast, Mondain, and Rossier, 2009).

Document analysis has been an important emerging qualitative method in demography. Analysis of policy has been used to interrogate the role of governance systems in shaping notions of the reproductive citizen, creating structures that (re)produce inequalities and violence, and in building conditions for reproductive governance in India (Chimbwete, Watkins, and Zulu, 2005; Nandagiri, 2019, 2020). For example, analysis of policy documents allows for an understanding of how men and boys are not included in conceptualisations of wartime sexual violence (Touquet and Gorris, 2016). Document analysis of enumerator manuals for quantitative surveys have been used to critique the current construction and training of data collectors, and how critical definitions – such as the 'household' – lack cultural specificity and contextual realities (Randall et al., 2015). Such analyses complicate concepts and definitions that are used to create quantitative measures, by questioning the populations and people included or excluded from those definitions.

Additional text-based qualitative methods include the use of journals, written by research participants, to create longitudinal qualitative data. Watkins and colleagues (Kaler, Watkins, and Angotti, 2015) set up a longitudinal qualitative study, utilising observational field journals to document infor-

mal conversations and observations on AIDS and then religion in rural Malawi (1999–2015). Adapting ethnographic methods into conversational journals by 20 Malawians, the study was originally linked to a household survey as part of the Malawi Diffusion and Ideational Change Project (Watkins, 2004). Diary data have produced important analyses for demography including on cultural change and authoritative knowledge (Kaler et al., 2015), prevention strategies to avoid infection (Watkins, 2004) and testing-related behaviours (Kaler and Watkins, 2010), amongst others.

The increasing use of text-based qualitative data has implications for research. The proliferation of spaces and mechanisms to access large volumes of qualitative, text-based data – such as social media, online journals – can exceed the capacity of qualitative analysis. Mixed-methods futures for these include the integrated use of computational text analysis alongside more conventional qualitative approaches (Chakrabarti and Frye, 2017). Novel technologies are being used in demographic research exploiting social media data, photo elicitation techniques, and more participatory methods (Alburez-Gutierrez et al., 2019).

The boundaries of qualitative research and the extent to which demography cross-pollinates with disciplines such as anthropology are made evident by the limited use of ethnographies and participant observation within demographic research. Exceptions include Hukin's (2014) study of contemporary childbearing in Cambodia, Biruk's (2018) ethnography of the data collection process itself and Alburez-Guttierez's (2018) use of genealogies to understand mortality in Guatemala. That these qualitative methods are rare in demography highlight the continued weight given to representative, larger-scale, and shorter-term, more rapid methods privileged within the discipline (Coast et al., 2007).

Research has increasingly reflected on the impact of making qualitative methods more central within core demographic inquiry. Fixed, positivist measurements of fertility and mortality have been questioned using qualitative methods. Fertility preferences and related behaviours are complex, fluid and non-linear. Trinitapoli and Yeatman (2018) argue the need for more qualitative approaches to survey methods to understand these realities better. Alburez-Gutierrez and colleagues (Alburez-Gutierrez, Kolk, and Zagheni, 2021) recommend that mortality data be more responsive to the impact of mortality, not merely its occurrence or prevalence, using qualitative methods to illustrate how experiences of child mortality have an impact on parents throughout their lifecourse. To a large extent, qualitative methods are used to complement and improve the quality of quantitative approaches.

### CRITIQUING DEMOGRAPHY

Methodological innovations in qualitative approaches to demographic research have underscored their importance in collecting robust and rigorous data. They have offered richer and more nuanced understandings of 'culture' in demographic behaviours (Coast, 2003; Bernardi and Hutter, 2007), challenged demographic theories and explanations (Bauer, 2014; Senderowicz, 2019) and attempted explanations of behaviours (Von der Lippe and Fuhrer, 2004; Johnson-Hanks, 2006). These contributions have demonstrated how crucial qualitative research is to demography, shaping new ways of collecting and analysing data.

Qualitative methods in their 'critical turn' have drawn on theory and knowledge from a range of disciplines, questioning and critiquing demography whilst at the same time deepening and complicating demographic knowledge. Biruk's ethnographic research (2018) on the collection of DHS data in Malawi demonstrates how the making of statistical data is a social process, challenging understandings of such quantitative data as 'pure' and 'objective'. This critical approach demonstrates how the production of demographic knowledge (e.g., statistics) is mired in what Biruk calls social and cultural scaffolding. It deepens demographic claims and subsequent programmes to see that numbers alone do not reflect authoritative knowledge but depend on *who* makes the claim and the contexts which give rise to it.

Brunson (2020) explores family planning and contraception use in Nepal. Utilising a case history of a social and behavioural change communication campaign, Brunson examines its meanings and uses. She demonstrates how discursive ideas of 'small family' are tied to the economisation of life and health (Murphy, 2017), as part of larger global agendas surrounding replacement fertility and population stabilisation. Senderowicz (2019, 2020) draws on reproductive justice frameworks (Ross and Solinger, 2017) to challenge long-held demographic measures of contraception (non)use and the assumptions that underpin them. Operationalising a new, expanded understanding of contraceptive autonomy, she offers a novel indicator for demographic research on fertility. In unpacking how quantitative data are collected, framed, measured, evaluated and reproduced within demographic research, these scholars draw on qualitative research and critical theories to critique established assumptions and ideas within demographic research, whilst at the same time questioning how the discipline (re)produces knowledge (amongst others, see for example, Siri Suh (2021), Katerini Storeng (2014; Storeng, and Béhague, 2017b; Storeng and Ouattara 2014), Marlee Tichenor (2017), Vincanne Adams (2016; Adams, Graig, and Samen, 2016)). Through qualitative methods they make explicit the implicit assumptions within quantitative data collection and

analysis, highlighting how rather than 'objective truths', quantitative data are also partial approximations and constructions of the social world.

Scheper-Hughes (1997) highlights that while demographic research can make attempts to be culturally sensitive in its data collection it may perhaps overlook its own disciplinary cultures that structure the questions posed and the ways in which it accounts for differences. Instead of relying on reductionist variables to account for 'culture', qualitative research could help challenge the ways these variables and categorical forms are constituted. For example, Kriel and colleagues (Kriel, Randall, Coast, and De Clercg, 2014; Kriel and Risenga, 2014) conducted a qualitative study in South Africa, demonstrating how 'households' are complex social structures and formations, at odds with the universal and simplistic definitions largely utilised in national surveys and census data collection. Sochas (2021), drawing on Connell's (1987) work on 'categorical thinking', applies a mixed-methods approach to interrogating health inequalities in Zambia. Her work highlights the context-specific and grounded meaning of socio-economic status categories (e.g., urban or rural, wealth quintiles, education) and rejects frames of specific categories as problematic or non-compliant to instead emphasise the political and structural institutions that give rise to and reproduce inequalities. Strong and colleagues use a mixed-methods approach to survey design that incorporates open-ended questions to explore the roles of men and masculinity in abortion and emergency contraception in Ghana (Strong et al., 2020; Strong, 2021). This approach offers data that do not necessarily fit a categorical approach (Sochas, 2021) and enables responses that capture non-standard responses (e.g., on patterns of partnership or relationships) or challenge assumptions underpinning the survey questions (e.g., focus on fertility alone, overlooking infertility concerns). It also enables survey feedback loops and notes on language or contextual cues from data collectors, capturing more nuanced (meta-) data for analyses.

### CONCLUSION AND FUTURE DIRECTIONS

Since the 1980s, the use of qualitative methods in demography has been complemented by an increase in interdisciplinary connections, offering new opportunities for understanding complex social phenomena. Despite the increased acceptability of these methods within demography, they are still made marginal by the standards of representativeness and generalisability to which demographic research is held. We argue that qualitative research, far from being ancillary in demography, is essential to understand complex social processes, as well as the biases that emerge in the production of apparently representative, generalisable and comparable data.

In consigning qualitative methods to the margins, demography has yet to fully benefit from innovations both critical to and critical of the discipline. Where qualitative research has been given space, it has encouraged demography to acknowledge the political and theoretical assumptions that underlie all research, regardless of its epistemological alignment. The implications for researchers mean that they are frequently tasked with 'convincing' demographic journals how their work aligns to these privileged epistemologies, adapting and translating methodologies that reinforce their marginality. This does not negate the importance of quantitative data. Rather, it encourages the discipline to consider the constraints of privileging some approaches above others. Newer demographic inquiry shows that qualitative approaches to research can be embedded within the structures of traditionally quantitative methods (such as surveys) to allow for novel, intersectional, contextual understandings of complex demographic behaviours and practices.

By sketching the methodological margins of demography, we aim to highlight the possibilities that can be achieved by inverting the discipline and centring qualitative alongside quantitative research. The limits of quantitative demographic research need to be more fully acknowledged, and the potential of mixed-methods and qualitative research needs to move beyond criticisms of representativeness and comparability. Making explicit the theoretical assumptions behind methodological decisions, unpacking the assumptions and positionality of the researcher/research team, and critiquing what quantitative methodologies are unable to do, are core qualitative expectations that can be centred more firmly.

People are complex, their lives are shaped by the social, political, economic conditions around them, constructed through interactions with others. As demography moves as a discipline towards better understanding the behaviours of people and populations, we inevitably question the demographic tradition of 'counting'. In failing to grapple with the complexities and potentials of qualitative research and in discounting or ignoring some of the challenging ideas that qualitative research reveals, demography risks constraining its progress towards understanding peoples' plural realities.

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