

The Impact of COVID-19 on Safari Lodges in Northern KwaZulu-Natal, South Africa

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Abstract

This investigation explores the impacts of COVID-19 on safari lodge operators in the northern districts of Zululand and uMkhanyakude in KwaZulu-Natal, South Africa. The area in which these lodges are located is a renowned leading safari lodge destination. This investigation is structured into four core sections. Firstly, brief insights into current debates concerning the influence of COVID-19 on tourism generally are provided. Secondly, the impact of COVID-19 on visitor profiles of safari lodges is analysed. Thirdly, the impact of COVID-19 on the functioning and operations of these safari lodges is examined. Fourthly and finally, the coping mechanisms implemented by the safari lodges are presented. The research deployed snowball sampling and conducted in-person interviews using a semi-structured questionnaire. The study reveals that this tourism subsector, like other tourism subsectors globally, suffered greatly as a result of COVID-19. Various adjustments to its operations had to be implemented in order to survive. These adjustments included scaling back operations, cutting costs wherever possible and drastically reducing staff. Additionally, many lodges tried to compensate for a lack of incoming international tourists by attracting local tourists by offering deep discounts. However, low levels of disposable income among South Africans means that this is not a long-term sustainable strategy. Future uncertainty was a key concern for safari lodge operations.

Keywords: COVID-19, safari lodges, Northern KwaZulu-Natal, South Africa, tourism

Introduction

“The years 2020-2021 (are) defined ... by the enormous challenges and changes that COVID-19 ... brought to everyday life. With continued travel and lockdown restrictions around COVID-19 severely impacting international tourism flows it is observed ‘in no uncertain terms, the pandemic has forever changed the tourism industry as we once knew it’” (Sin, Mostafanezhad & Cheer, 2021: 655-656). The impacts of COVID-19 on the tourism industry - domestic tourism, international travel, public and air transport, cruises, restaurants, and accommodation - have been devastating (Gössling, Scott & Hall, 2021; Rodríguez-Antón & Alonso-Almeida, 2020; Yuki, Fujiogi & Koutsogiannaki, 2020). Globally, interventions to mitigate the spread of the Coronavirus included lockdowns (mandatory/voluntary quarantine, home isolation), social distancing measures, postponements or total cancellation of events such as conferences, festivals, trade shows, elections, and the closures of universities/schools and non-essential businesses such as restaurants, bars and workplaces (Gössling et al., 2021). These measures had extremely harmful effect on multiple industries, especially the tourism industry. All parts of the hospitality value chain were affected, resulting in restaurants closing their doors and massive accommodation cancellations. Recent research has shown that the global tourism GDP lost up to US\$ 2.1 trillion and shed 75 million workers in 2020/2021 (IATA, 2021). In

Africa, the effect of the pandemic interventions hit hard particularly for mainstay tourism product segments such as safari tourism and safari lodges (Rogerson & Rogerson, 2020, 2021).

Against this background, the research investigated the impact of COVID-19 on the safari lodge industry of Northern Zululand and uMkhanyakude, KwaZulu-Natal, South Africa (see Figure 1). The safari lodge industry is part of the nature/wildlife tourism sub-sector, where tourists pay for encounters with non-domesticated animals in their natural environment, either as eco-tourists (wildlife safaris) or as hunters. Safari lodges are a common type of tourist accommodation in Eastern and Southern Africa and are typically located within or next to, wildlife parks or game reserves. The accommodation on offer in safari lodges ranges from limited to serviced accommodation such as lodges, self-service accommodation (chalets), safari tents, tented camps and log cabins (Kriek, 2017). Safari lodges are spread across the length and breadth of South Africa, but this study elected to focus only on two specific districts of Zululand and uMkhanyakude in the province of KwaZulu-Natal. Both districts are home to a multitude of safari lodges (44 in total) and as a result, safari lodges play a significant role in the tourism sector of KwaZulu-Natal.

From a methodological point of view, non-probability snowball sampling was used with the aim of interviewing as many of the 44 lodges as possible until saturation was reached. For this reason, snowball sampling continued until the saturation points for the research themes were reached. The main data-gathering tool was an interview with a focused set of questions. Participants were asked to take part in the study via an email invitation which fully explained the reasons behind the study, after which, if they accepted, they were contacted with further information regarding the setup of an interview. Of the 44 safari lodges, 15 agreed to participate. These interviews were set against larger debates.

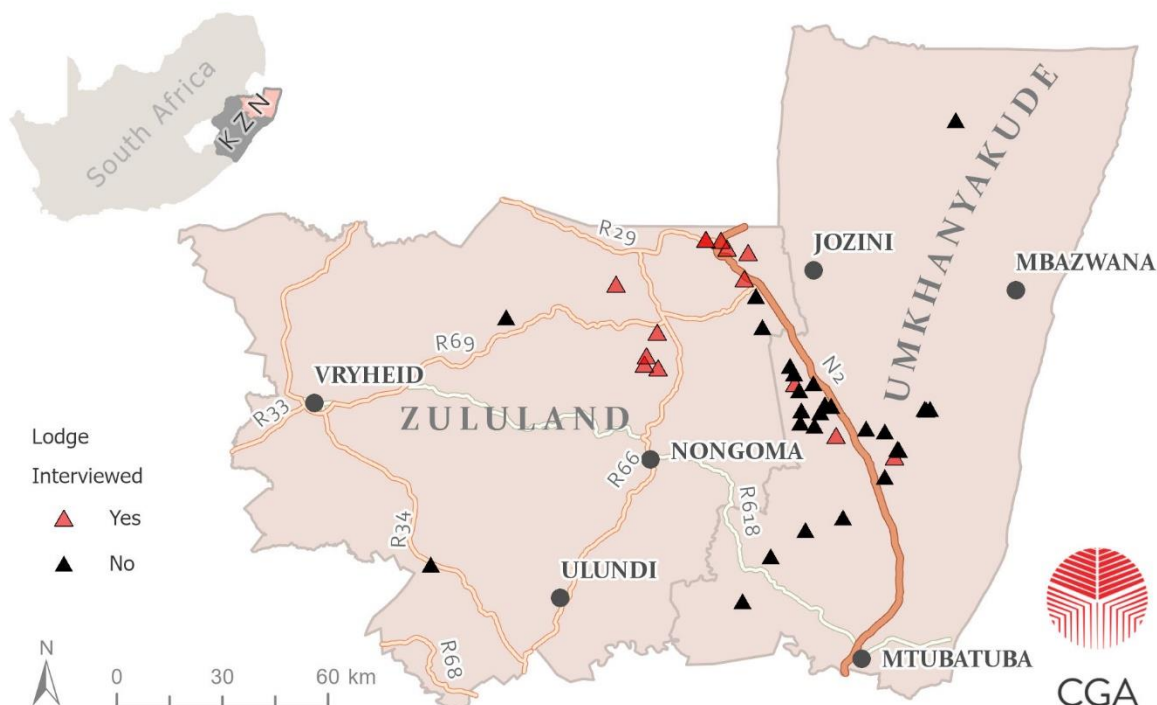


Figure 1: Map of the area showing location and participation of safari lodges in the study

Current debates on tourism and pandemics

Globally, the deployment of tourism as a developmental driver is well documented (Rogerson & Rogerson, 2020; Rogerson & Visser, 2020). The sector is, however, hamstrung by challenges such as political instability, economic downturns, natural disasters, and government policy (Gössling et al., 2021; Visser & Ferreira, 2013). Multiple crises such as the 9/11 terrorist attacks on the United States of America, the SARS (severe acute respiratory syndrome) outbreak of 2003, the global economic crises of 2008 and 2009, the eruption of the Eyjafjallajökull volcano in Iceland and the MERS (middle east respiratory syndrome) outbreak of 2015, all caused massive disruptions in the European and trans-Atlantic aviation systems (Hall, Scott & Gössling, 2021) and the increased connectiveness of countries around the world has meant that such crises have widespread effects. Global systems such as economies, media and transport systems have become so intertwined that when a crisis occurs in one sector, the impacts reverberate throughout the entire system (Visser & Ferreira, 2013).

It has been argued that the increase in pandemics in the 21st century, such as SARS, MERS and now COVID-19, is in part due to rapid population growth, increased urbanisation resulting in increased population densities, global transport systems that enable the rapid spread of pathogens, and lastly, growing consumer product demand (Hall et al., 2021). Anti-COVID-19 measures represent by far the most serious challenge the tourism sector has ever faced, with the impact estimated to be about seven times worse than that of the financial crises of 2008 (Cetin, 2020). In an extensive recent literature review, Rogerson and Rogerson (2020, 2021) summated that preliminary evidence on international COVID-19 impacts should lead to critical reconsiderations of the current model for tourism which has focused on growth, to consider the risks incurred by global travel, as well as the sector's contribution to climate change. This is in line with recent academic narratives that challenge the pre-COVID-19 view that more arrivals automatically equates to greater destination benefits. For example, Gössling et al. (2021) call for the global tourism system to be re-oriented towards addressing the United Nations Sustainable Development Goals (SDGs) instead of towards "growth as an abstract notion benefiting the few" (Ioannides & Gyamóthi, 2021). In this interpretation, a return to business-as-usual when the crisis is over should rather be an opportunity to consider a transformation of the global tourism system that is more aligned with the SDGs (Gössling et al., 2020). That said however, as shall be illustrated by this study within the context of the South African safari lodge sector, this goal is not necessarily one shared by industry players in response to the current situation which is in contrast to Benjamin, Dillette and Alderman, (2020: 476) arguing "We can't return to normal: Committing to tourism equity in the post-pandemic age".

In recent publications, various perspectives have been applied to investigate the impacts of the COVID-19 pandemic on tourism and hospitality (Rogerson & Rogerson, 2021). We contend that these are projections and not a reflection of real responses on a longer term basis. Nevertheless, from the literature it was observed that the impacts of COVID-19 include tourist accommodation (American Hotel & Lodging Association, 2020), environmental distress (Crossley, 2020), human rights (Baum & Nguyen, 2020), mobilities (Abu-Rayash, & Dincer, 2020; Iaquinto, 2020; Renound, 2020), media analysis and communication (Seraphin & Dosquet, 2020; Wen, Kozak, Yang & Liu, 2020; Yuki et al., 2020; Zheng, Luo & Ritchie, 2021) global versus local approaches (Brouder, 2020; Higgins-Desbiolles, 2020; Jamal & Budke, 2020; Niewiadomski, 2020; Romagosa, 2020; Tomassini & Carvagnaro, 2020), sustainability (Corbisiero & La Rocca, 2020; Ioannides & Gyamóthi, 2021), travel preferences (Yuni, 2020), as well as, technology and the fourth industrial revolution (Gretzel et al., 2020; Sigala, 2020; Zheng et al., 2021). Inter-disciplinary and integrated studies have also flourished to add further rich insights on the ramifications of the COVID-19 pandemic on the tourism sector (Aliperti, Sandholz, Hagenlocher, Rizzi, Frey & Garschagen, 2019; Brouder, 2020; Lew,

Cheer, Haywood, Brouder & Salazer, 2020; Rogerson & Baum, 2020). Zenker and Kock (2020) however have issued a call for tourism researchers to transcend impact studies and rather interrogate deeper underlying relationships and how these – such as tourist behaviour or destination image - might shift as a result of the coronavirus pandemic.

Owing to COVID-19, countless tourism enterprises have ceased to operate which has resulted in an estimated \$1 trillion in lost revenue (Gössling et al., 2021; Škare, Soriano & Porada-Rochón, 2021). This is specifically due to governments making decisions that undermined two essential components of the tourism industry: the ability to travel, and social interactions between tourists and the host populations. Confinement restrictions such as nationwide lockdowns, travel bans and social distancing measures resulted in the tourism industry switching, albeit potentially just momentarily, from over-tourism to non-tourism (Corbisiero & La Rocca, 2020: 95). Initially, the drastic measures taken in early 2020, such as lockdown implementations, were touted as being a ‘quick fix’ that would last ‘three weeks’ however, restrictions continued in various forms and still continues into late 2021, as the severity of the COVID-19 virus fluctuates in different countries around the world’. Consequently, the activities of the tourism industry underwent - and are still undergoing - massive changes to their central operations as the industry has had to adopt coping mechanisms to survive.

Unprecedented global lockdowns, social distancing measures, the closure of ports and flight cancellations accounted for the most critical impacts on the global hospitality and tourism sector due to COVID-19 (Gössling et al., 2020; Nhlamo, Dube & Chikodzi, 2020; Rogerson & Rogerson, 2020, 2021). These interventions interrupted the supply chain of tourists, and as a result, occupancy rates at all forms of accommodation providers collapsed (Gursoy & Chi, 2020; Hall et al., 2021; Robinson, Mearns & McKay, 2021). As cancellations increased, accommodation providers such as hotels and Airbnbs found themselves in a liquidity crisis with very little cash flow (Nhlamo et al., 2020). Consequently, drastic cost-cutting measures had to be implemented including employee furloughs and layoffs. In addition to low occupancy rates, accommodation providers have further been subject to changes in their functioning and operations such as intense increases in the usage of cleaning and disinfection chemicals, the increased cleaning of all common areas at the accommodation providers, personal protective equipment (PEE) for all staff, regular temperature checks and contact tracing registers. Coping mechanisms adopted by the sector included implementing reduced accommodation fees, requesting or accepting stimulus packages from governments, taking loans as well as increased media advertising (Dayour, Adongo, Amuquando, & Adam, 2020).

Of course, the accommodation sector has not suffered alone as the restaurant industry, a subset of the hospitality industry, has also been a casualty of the pandemic (American Hotel & Lodging Association, 2020). Initial findings suggesting that the buffet sections of cruise ships served to spread COVID-19 meant that restaurants faced severe restrictions such as forced closure or reduced seating capacity owing to social distancing. By the end of March 2020, restaurants in major cities across the globe recorded business levels at between zero and two percent of normal rates, especially as sit-in customers disappeared completely (Nhlamo et al., 2020). Resultingly, restaurants around the world laid off up to 80% of their staff. As countries eased lockdown restrictions, restaurants have been allowed to operate once more. However, changes have occurred to their functions and operations. Some of these include contactless menus, routine table sanitisation, guest capacity restrictions, the separation of tables for increased social distancing between diners, guest screening, sanitising stations at both entrances and exits, intense increase in the disinfection of cutlery as well as removing buffet dinners (Dube, 2021). Additionally, many restaurants switched their offerings from eat-in to takeaway services (Dayour et al., 2020).

The aviation industry is a crucial segment of the global tourism industry, thus, the catastrophic effects of COVID-19 on this sector has proven very destructive for all other tourism subsectors. The aviation industry is dependent on the movement of people, cargo, and other travel-related products for revenue generation (Robinson et al, 2021). International travel bans and social distancing measures saw the activities of commercial flights in March 2020 reduce to less than 75% in comparison to March 2019 (Sanchez, Voltes-Dorta & Cugueró-Escofet, 2020). This has had direct knock-on effects to connected industries, such as air traffic navigation companies, airport companies and retailers that operate within airports (Sun, Wandelt, Zheng & Zhang, 2021). Clearly, owing to the extensive and dense network of supply chains and other types of interfaces associated with the tourism system there is no part of this economic ecosystem that has not been impacted by COVID-19 (Hall et al., 2021). With that in mind, attention now turns to the background development of the lodges investigated.

Safari Lodges in the districts of Zululand and uMkhanyakude in the province of KwaZulu-Natal

The development of nature reserves in South Africa, particularly in KwaZulu-Natal, has a long history, with some established in the early 20th century (Brooks, 2004, 2005; Ezemvelo KZN Wildlife, 2015). Most safari lodges in Northern KwaZulu-Natal, the focus of this study, have been in operation since the early 2000s although the reserves where the lodges are located were mostly established in the early 1950s. Most of the reserves initially operated as former cattle farms for Bonsmara and Braham cattle, where new breeds were introduced to South Africa in the 1950s. Over time, farmers found that an abundance of indigenous wildlife (antelope species such as impala, kudu, bushbuck, and duikers) presented an opportunity for a better source of income than cattle farming. Unlike cattle, game is more difficult to steal and re-sell outside of the formal game auctions. Game also has fewer overheads than cattle since game is generally less vulnerable to diseases, less labour intensive and more able to live off the land. Additionally, increased demand for African safari tourism led most farms to switch to conservation operations and building safari lodges in order to provide accommodation and recreational activities for foreign and domestic visitors. With the transition to wildlife, owners initially introduced zebra, giraffe and wildebeest and later added the Big Five (lion, rhino, elephant, leopard and buffalo). More recently, reserves have also introduced cheetah, black rhino and the African wild dog. The introduction of the Big Five along with highly endangered species have greatly added to the overall conservation and market value of the reserves and safari lodges located within them. Such practices have, however, been critiqued in relation to alternative land uses and prior ownership (see Brooks, Spierenburg, Van Brakel, Kolk & Lukhozi, 2011; Spierenburg & Brooks, 2014).

Results

The introduction of wild animal species, especially the Big Five, to land formerly used for cattle farming impacted on carrying capacity meant that farmers had to have land reserves ranging from 2 000ha to 29 000ha in size. This was achieved by smaller farm owners agreeing to remove their fences in order to create larger reserves. There are however some smaller reserves, with no neighbouring farms or neighbours to other game reserves, that chose to stay single entities. Local politics and friction surrounding wildlife ownership between reserve and lodge owners are the main reasons for the existence of these small entities.

In terms of ownership, the lodges within the study were either family-owned by South Africans or foreign-owned. The reserves which were family-owned were run by farmers who had the land, and by extension the lodges, in their family for many generations and who intended to bequeath it to the next. Some of these families had lived in the area since the late

1800s. The foreign owners of reserves in the area were people from Europe including Spain, the Netherlands, Germany, and Switzerland, who, back in the 1950s, had the means and desire to own a piece of land in South Africa and so either purchased farms from South Africans or from the State. These farms were also passed down from generation to generation.

Regardless of ownership, the lodges were found to have several similar features. One common feature was that the lodges all had a “main lodge” otherwise known as the main building that includes a kitchen, a reception and a dining room area followed by accommodation structures. The accommodation structures of the safari lodges were either chalets, suites, glamping tents or self-accommodation chalets. Most of the lodges had full catering facilities, however, there were a few that provided self-catering accommodation. The typical size of the lodges was such that they provided accommodation for between 16 to 24 guests, apart from one lodge that could accommodate up to 150 guests. Of the 15 safari lodges, six had spa facilities and three had fitness centres. Most of the lodges offered multiple activities for their guests including game drives, bush walks, birding safaris, visits to local Zulu tribes, fishing trips, excursions to nearby oceanic and wetland locations, horse riding, target shooting and other ecotourism activities.

Visitor profiles

Pre-COVID, the primary target market for the safari lodges was international tourists, with an estimated ratio of 85% international and 15% local guests. A minority did, however, cater primarily to South African tourists. Recent international flight cancellations, national border closures and travel bans, however, resulted in the lodges facing extremely high booking cancellations. For example, one respondent saw a 70% decline in their occupancy rates during the time of the international travel restrictions, especially during the first COVID-19 wave (March-July 2020). Another respondent highlighted that a travel company that usually booked their lodge for eleven consecutive weeks out of the year for major international group bookings, cancelled for both 2020–2021. One respondent revealed that they closed one of their safari lodges entirely during the first lockdown and it is still not in operation. Many others indicated that they closed from late March 2020 and only re-started operations in May 2021.

An additional problem for safari lodges was the overall negative media coverage that South Africa received. Initially, the main cause for low occupancies to the safari lodges was the international travel ban and global lockdowns. However, as time went on and non-pharmaceutical interventions were slowly being lifted, the portrayal of South Africa in the international media delivered a further blow to the sector. One respondent expressed as follows: *“During the initial outbreak of the pandemic, we had an occupancy rate of only 10%, as time has passed and restrictions have been lifted here, we have seen our occupancy rates climb to 40%; this growth is however threatened by the media that continuously depicts South Africa and its COVID-19 strain as highly dangerous, despite our vaccination roll-out programme.”* [Respondent 1]. Another respondent observed that, *“Our lodge is extremely reliant on the European market. South Africa has been placed on the ‘red list’ by multiple European countries as a result of our high COVID-19 cases and highly contagious Delta strain. Consequently, despite travel bans having been lifted here and elsewhere to some degree, we are still not receiving the number of tourists we need to ensure our business survival”* [Respondent 2].

Owing to ongoing international travel bans safari lodge operators turned to the domestic market in 2020 once domestic travel was reopened, with special rates offered to locals. As a result, some recorded a 15% increase in occupancy rates in August 2020, mostly over weekends and public holidays. These local customers were either those who had never been on safari before, “budget consumers” looking for bargains or affluent consumers who, owing to

international travel bans, had substituted their yearly overseas holiday with a local safari holiday. The closures of South Africa's beaches in December 2020 also resulted in a significant increase in bookings as locals swapped beach breaks to bush holidays. The rise in local market share may herald a future tourism industry belonging to the local (Everingham & Chassagne, 2020). In that regard, most respondents said domestic tourists were not a major source market in the long term. Locals have lower disposable incomes and so cannot pay the rates required to cover the significant overheads the lodges have. This is something only well-heeled international tourists can do. For example: *"People do not realise how expensive it is to run a safari lodge within South Africa, never mind a five-star lodge. You need highly skilled individuals such as chefs, food and beverage managers, and financial managers - who are not cheap to hire. Marketing is an extremely expensive cost that needs to be covered every year. For example, we pay a retainer fee of R20 000 every month to our marketing agency to ensure that we get enough marketing exposure. In addition to the lodge costs, you have the costs of running a game reserve as well. Infrastructure costs such as roads and up-to-standard fences are extremely expensive. This is not even talking about annual anti-poaching units and wildlife vet fees. Having all of these expenses to cover, there is just no way that the safari lodges can solely focus on the local market by keeping the prices as low as they are now, it simply is not viable."* [Respondent 4].

Functions and operations

A multitude of lodge functions and operations had to change in order to adapt to the new circumstances surrounding COVID-19, the most important of which was COVID-19 protocols which included sanitising stations, COVID-19 notices, ongoing sanitation, face mask wearing and a COVID-19 screening questionnaire for contact tracing and temperature checks. The application and implementation of these standard COVID-19 protocols is also noted in the literature among the other tourism sub-sectors (Dayour et al., 2020).

The operations and functions of the restaurants, dining areas and kitchens were also subject to several changes. For example, tables had to be moved further apart from one another to ensure that social distancing requirements were met. Buffet dinners also changed, for example: *"Guests are only allowed to dish up per table, rather than having all the guests dish up at once. We have found this to be a great way of reducing contact and crowding amongst guests and thus the possibility of cross-contamination"* (Respondent 3). Keeping the buffet was not in line with WHO recommendations, but the lodges said 'al la carte' menus were simply too expensive and resulted in food wastage. Additionally, surfaces in bathrooms, toilets and restaurants were monitored carefully, and staff would clean surfaces after use. This led to a massive increase in the use of cleaning chemicals. All guest rooms also had to undergo extreme sanitising and cleaning before guest arrivals and after they left. Staff also had to do "spring cleaning" once a week to thoroughly clean every inch of the sleeping areas which necessitated mist blowers which are used to fumigate the suites twice a week.

Recreational activities were third-in-line to receive some changes. In terms of game drives, the number of guests in game drive vehicles at any one time was reduced from nine to six. Owing to a decrease in the overall carrying capacity of game drive vehicles, more vehicles had to be used which led to an increase in diesel consumption as well as the need for more rangers and trackers. The game drive vehicles also needed to be sanitised before and after drives. Each guest rain poncho also had to be stored in separate plastic bags to avoid cross-contamination. In addition, some lodges closed their spas and wellness centres, especially during peak COVID-19 infections.

Across the study sample, in response to the decrease in visitors and revenue, it was found that lodges drastically reduced their staff, such that they were operating on a skeleton staff. Others placed some staff on annual leave or issued temporary layoffs and many were moved to a “days worked; days paid” agreement. Alternatively, some lodges retained their staff but halved their salaries. Many of the retrenched staff had not been replaced, nor had salaries returned to pre-COVID-19 levels. Owing to fewer staff numbers, some staff members took on multiple roles. For example, workers who cleaned rooms or worked in the kitchen now also set tables or waited on guests. Game vehicle drivers now also operate as trackers. In some cases, employees in managerial posts also took on the role of host or took guests on game drives. Despite the extra workload however, staff salaries did not increase.

Coping mechanisms

Overall, three different coping mechanisms were identified:

Firstly, lodges cut operational costs wherever possible by, for example, downscaling services and activities such as reducing food expenses, staff numbers, game drives, spa treatments and overall accommodation capacity. Food costs were cut by making changes to menus such as removing high-priced ingredients or meals, as well as exchanging items for lower-priced ones whilst retaining quality. Owing to the costliness of spa products, spa treatments were either severely scaled back or the entire spa was closed.

Secondly, lodges tried to increase revenue by appealing to and attracting the local market. This involved reducing room rates, offering promotional “specials” and increasing advertising to the local market. Owing to relatively low disposable incomes, few South Africans can afford even typical low-season rates. So, during the pandemic, rates for domestic tourists had to be lowered to such an extent that it threatened business viability. In addition, since all safari lodges in the area were competing for the same pool of tourists, there was tremendous competition among the different business operators. One respondent (5) expressed this sentiment as follows, *“Everyone has been dropping their rates extremely low to try and attract local guests. In truth, everyone is scrambling for cash flow. I have come to the point where I cannot drop the rates any lower than they are now because they are already priced below the viable rate.”*

Thirdly, many operators accessed the Tourism Relief Fund set up by the South African government as well as extra employee assistance offered by the safari lodges among themselves. The South African government established a tourism relief fund (TERS) of R50 000 per entity to assist the tourism sector through the pandemic. Most lodges benefitted from this fund, although they complained about obstacles such as huge amounts of paperwork and compulsory BEE requirements. Applications also took a lot of time and energy to process, with payments being delayed. Pay outs from this fund were also problematic as money had to be directly transferred from the managers’ account to the staff members (Department of Tourism. (2021).

Despite these three coping mechanisms, most respondents felt that none of them worked all that well. Additionally, future uncertainty was a major concern. Lodges felt they could not adequately plan for the future. Additionally, it was clear that the longer COVID-19 restrictions remain in place, the less financially viable the lodges become.

Conclusion

This investigation highlighted that safari lodges in the study area - just like other tourism subsectors - suffered greatly owing to the COVID-19 pandemic and associated preventative measures. Since the subsector is mostly reliant on international tourists, international travel bans and global lockdowns caused exceptional declines in overall occupancy rates for

accommodation businesses and in turn, steep declines in revenue generation. The operations of the lodges were thus severely affected. Whilst efforts were made to cut costs in order to counter the loss of revenue, some costs could not be decreased, and some additional costs were even incurred such as implementing extreme health and safety protocols in line with national COVID-19 regulations. The significant increase in the use of cleaning and sanitizing materials and products also increased the amount of solid and hazardous waste generated by these businesses. Worse so is that, in a country with extreme unemployment (StatsSA, 2021), and in an area that is highly impoverished, many jobs were lost and/or salaries substantially reduced (with no rebound in sight). It is evident from this study that these particular specialist service providers cannot survive in the long-term without access to the international tourism market since there is no simple way to adapt their business model to the domestic market. As a result, concern about the uncertainty of the future for safari lodge operations was a key finding.

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