The Thinking House

BORD BIA INSIGHT CENTRE

Potato Usage & Attitudes In Ireland - 2019

Contents Page

- Objectives and Methodology
- Millennial world deep dive
- Millennial culinary behaviours
- The carbohydrate world
- Potato purchaser
- Potato purchaser: why and when
- Ways to eat
- In-Store Behaviour
- INSPIRE platforms

Research Objectives

"To provide Bord Bia and the industry with a detailed understanding of consumer attitudes towards potatoes and drivers behind purchasing decisions."

1. Attitudes Towards the Consumption and Purchasing of Fresh Potatoes



3. Understanding the Purchasing Journey Including Triggers and Barriers To Purchase





2. Profiling the Potato Consumer Including Understanding Usage Occasions and Need States



4. Explore the Category Dynamics Including the Role of, and Relationships with, Different Brands and Varieties

Bord Bia
Irish Food Board

Research Approach



25 Minute Online Survey Amongst 1,500 Adults Aged 18+



2 x Instore Predatory Interviews Amongst Potato/Potato Alterative Shoppers



2 x Focus Groups Amongst Millennial Grocery Shoppers

Where possible results have been compared to previous research conducted in 2012. However please note this was a face to face survey amongst 700 household decision makers.

Bord Bia
Irish Food Board

Our research partners



Bord Bia
Irish Food Board

Additional sources from the Thinking House



Google

NewNutrition Business

MINTEL

IGD

GlobalData.

The Grocer

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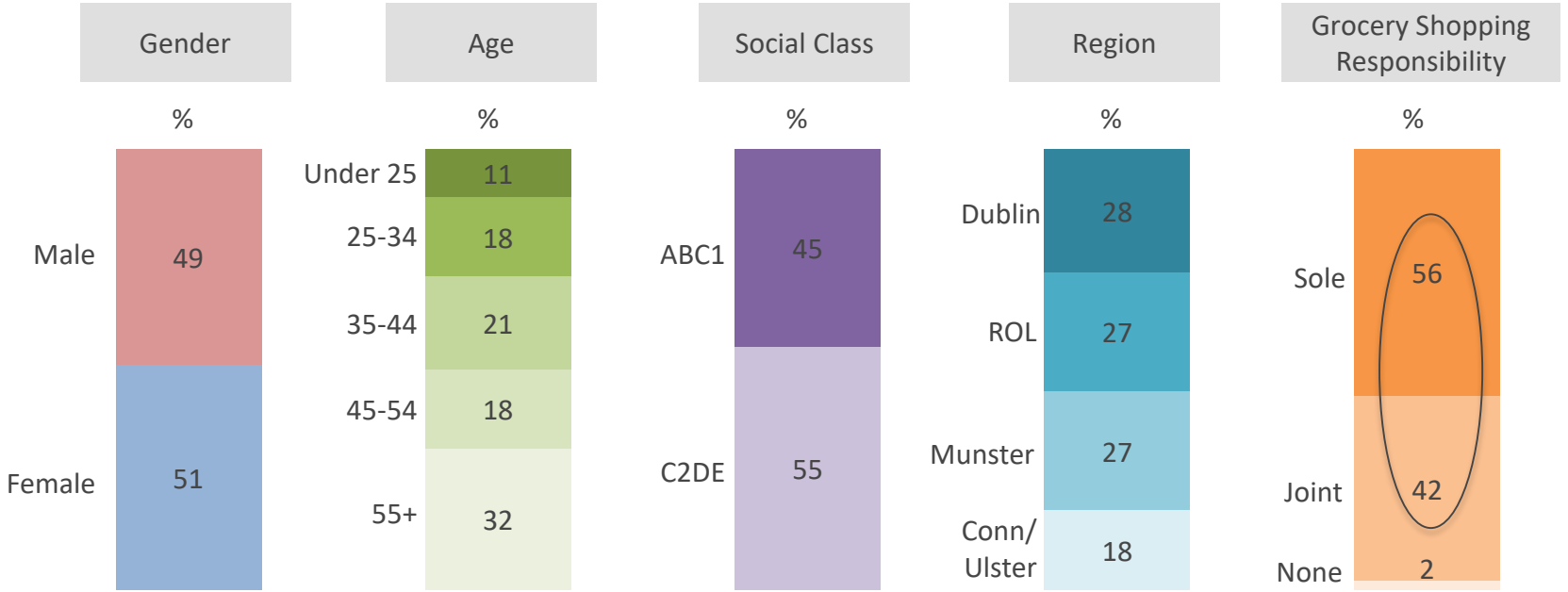
Consumer
LIFESTYLE TRENDS

Research Audience



The total sample is nationally representative based on gender, age, social class and region. Analysis focuses on all grocery decision makers.

Profile. Base: All adults aged 18+ - 1,500

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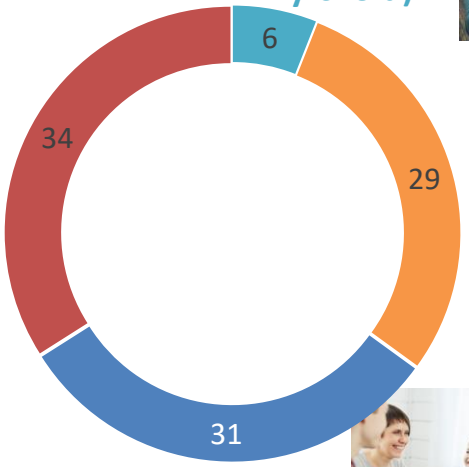
Research Segments



Gen Z (18-22 yrs. old)



Baby Boomers+ (54+ yrs. old)





Gen X (38-53 yrs. old)



Millennials (23-37 yrs. old)

The focus groups were conducted amongst Millennials (younger/older).

Results have been analysed by generation, including by the key target of Millennials. Gen Z are a smaller cohort but have a sample size over 75 so are analysable.

Profile. Base: All grocery decision makers – 1,466

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Research Segments - Profile



Gen Z
(18-22 yrs. old)

Majority are living with parents and studying

59% Live with parents

22% Live with friends



Millennials
(23-37 yrs. old)

Mix of families with young children and pre family couples/ singles

50% Have children under 13

Living on own or with partner 37%



Gen X
(38-53 yrs. old)

Families with teens and younger children

63% Living with children



Baby Boomers+
(54+ yrs. old)

Majority are empty nesters…

78% Have Children

Adults only in household 88%

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Profile. Base: All grocery decision makers – 1,466


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Millennial World Deep Dive

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Consumer

LIFESTYLE TRENDS

The Consumer Lifestyle Trends represent the biggest trends shaping people's lives over the next 3-5 years. By keeping up with trends and understanding what's coming next, the programme helps companies within the food & drink industry in Ireland to better prepare for the future needs and desires of their consumers.

GOOD THINKING Consumer LIFESTYLE TRENDS

(Bord Bia, 2018)[1]

ENGAGING Experiences

Consumers want moments of discovery and delight that enhance their day, sharing exciting stories and spaces with others.

HEALTH & Wellbeing

Consumers want to eat, drink and live to optimise their body's systems, to feel better than well today and tomorrow.

Fuller LIVES

Consumers want to use their time to be as productive and sociable as possible, flowing from one thing to the next - and want to be helped, not hindered, by tech.

Responsible LIVING

Consumers want to have a positive impact on society and the environment, and take pride in a sustainable way of living.

COMMUNITY & Identity

Consumers want to express the views and values of themselves and their community, and have their uniqueness and creativity respected and celebrated.

Consumer LIFESTYLE TRENDS

ENGAGING Experiences



“I want moments of discovery and delight that enhance my day, sharing exciting stories and spaces with others… (Bord Bia, 2018)[1]


FOOD 35w
Yasss
Story Culture
@naturalbornfeeder oat
crepes


Sensory Experiences
BUTTERFLY EFFECT
BUTTERFLY PEA FLOWER
SMOOTHIES


Peer to peer
ENGAGING
Experiencey


Food Fusions

Consumer LIFESTYLE TRENDS

Responsible LIVING



“I want to have a positive impact on my society and the environment, and take pride in that sustainable way of living…

(Bord Bia, 2018)[1]

picard

Eco status



Image Source: Tael [CC BY-SA 3.0)
https://creativecommons.org/licenses/by-sa/3.0

Responsible LIVING

Innovating Against Waste



Image Source: Nestle on Flickr
https://www.flickr.com/photos/nestle/46134189344/



“I want to eat, drink and live to optimise my body’s systems, to feel better than well today *and* tomorrow… (Bord Bia, 2018)[1]

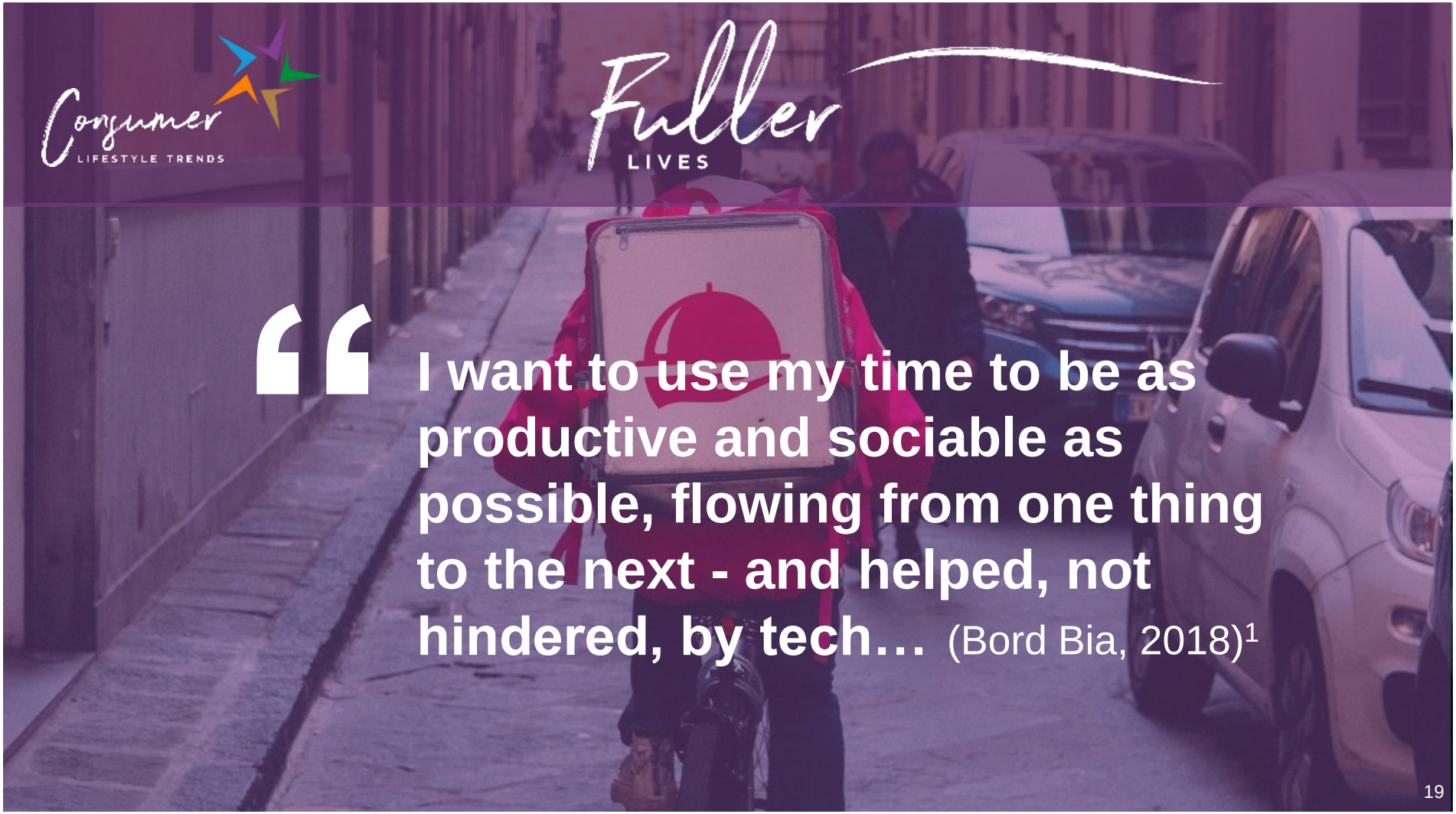


Rediscovering natural

HEALTH & Wellbeing



Engineering goodness


Consumer
LIFESTYLE TRENDS
Fuller
LIVES
“
I want to use my time to be as productive and sociable as possible, flowing from one thing to the next - and helped, not hindered, by tech… (Bord Bia, 2018)[1]

LIVEKINDLY

VEGAN MEAL KIT DELIVERY COMPANY IS FEEDING MILLIONS OF AMERICANS WITH PLANTS

Delivery 2.0



Flexi Food

Fuller LIVES

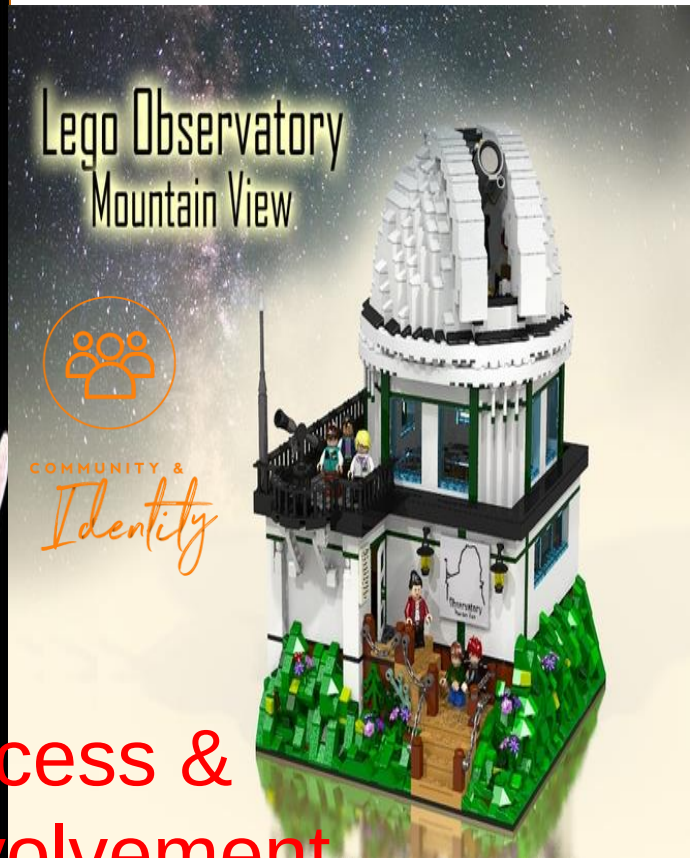

Consumer
LIFESTYLE TRENDS
COMMUNITY &
Identity
“
I want to express the views and values of myself and my community, and have that uniqueness and creativity respected and celebrated…
(Bord Bia, 2018)[1]



Identity Spectrums



MADE



Access & Involvement

1. Millennials Deep Dive

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1. The mainstreaming of health



63% claim to have made SOME effort to **eat more healthily** in the past year (Bord Bia, 2018)[2]

60% have made a SOME effort to **exercise more** in the past year (Bord Bia, 2018)[2]



Changes Made in the Past 12 Months

Eat more Healthily	69% Effort TOTAL	73%	68%
	62%	73%	71%
Exercise More	60% Effort TOTAL	67%	58%
	64%	56%	60%



(Bord Bia, 2018)[2]

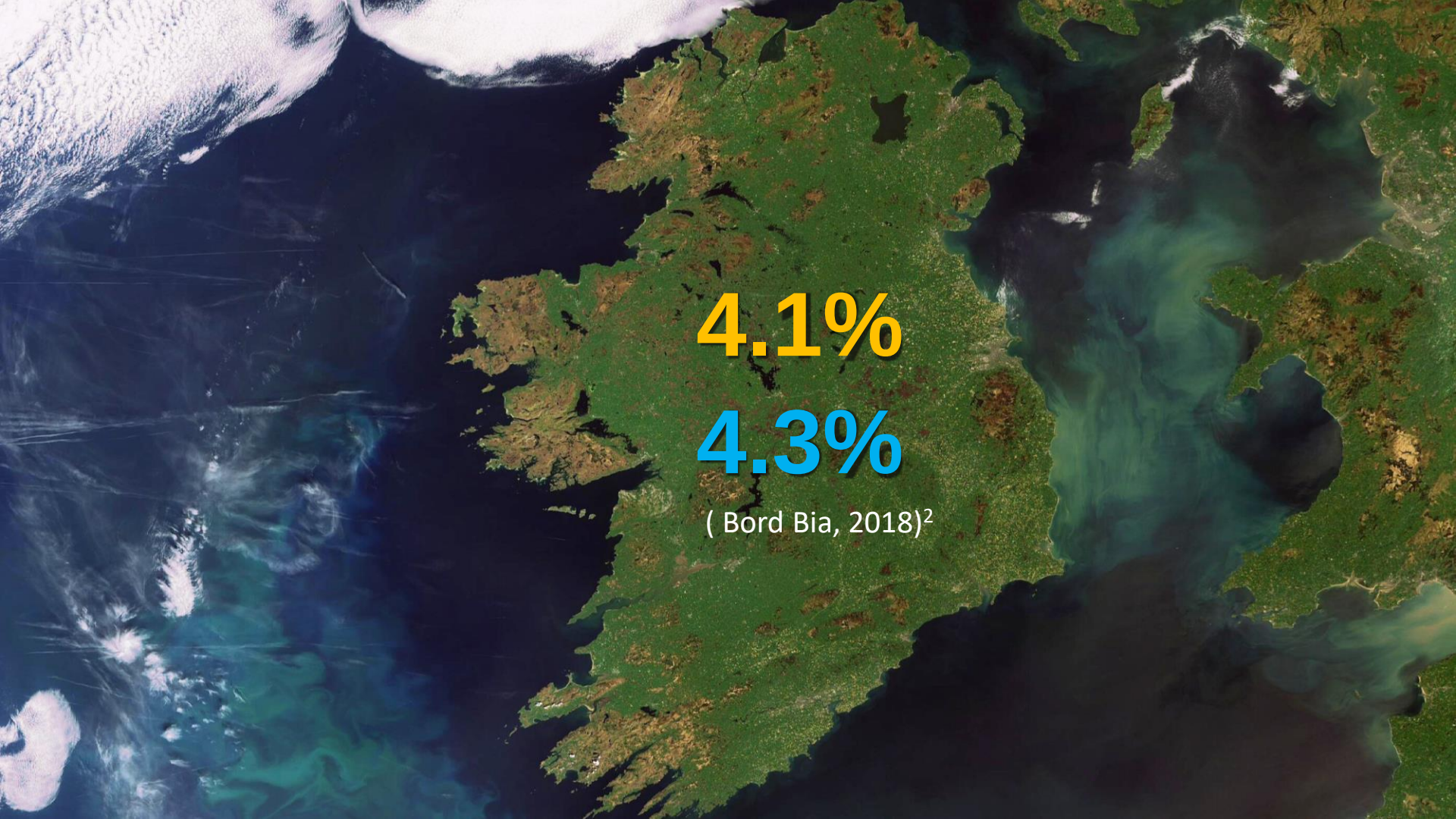
92% indicate that they **would like to make a change** to improve their health and wellbeing

*The most common change that people would like to make is to be more **physically active** (40%), followed by being more financially secure (31%), sleeping better (30%) and **eating more healthily** (29%)*

(Department of Health, 2016)[3]


22% of People claim to be following a specific dietary regime
(Bord Bia, 2018)[2]


19% of People
claim to be following
a diet that has a
greater emphasis on
plant-power
(Bord Bia, 2018)[2]


4.1%
4.3%
(Bord Bia, 2018)[2]

2. The role of identity

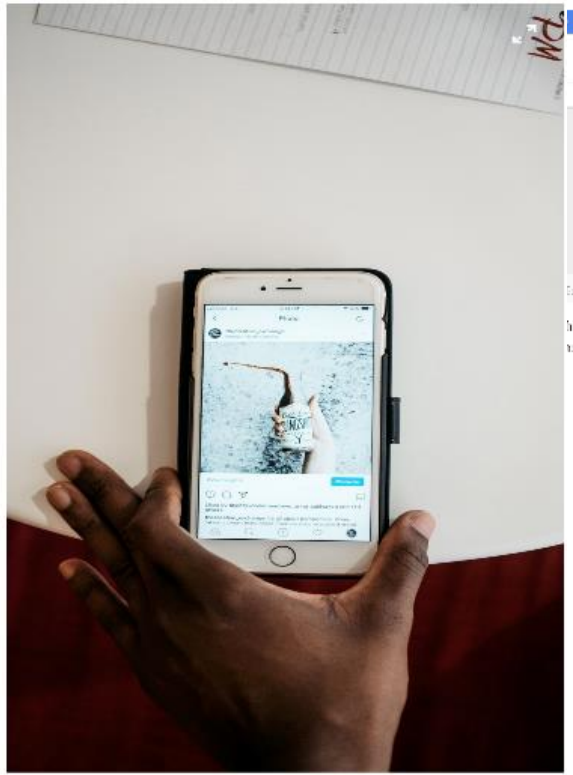


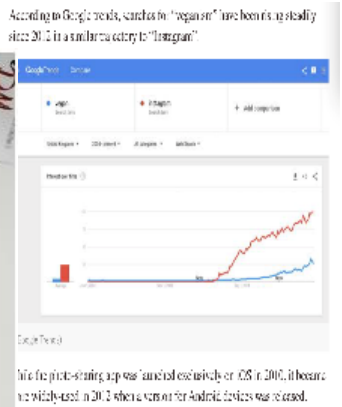
63% of vegans stated that food choices are a big part of their identity (Bord Bia, 2018)[2]

Opportunity: social

The Instagram Generation

Trends around new diets have been rising steadily since 2012..in a similar trajectory to Instagram



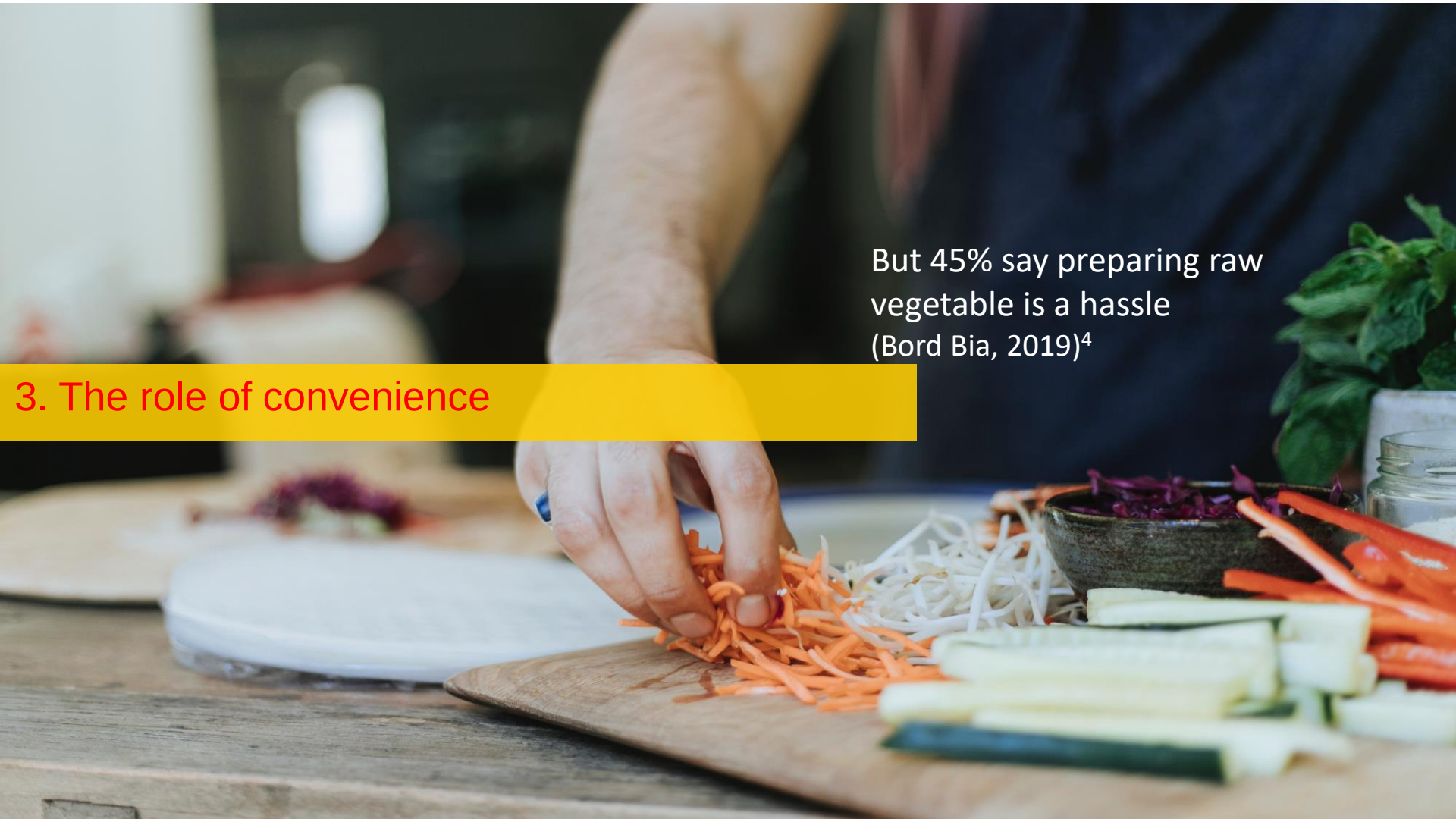


"veganism has got the instagram generation"

Shane Holland

Slow Food, UK

(Bord Bia, 2018)[2]



But 45% say preparing raw vegetable is a hassle (Bord Bia, 2019)[4]

3. The role of convenience

43% of over 65s eat at mealtimes vs 24% of U65s

(Bord Bia, 2018)[5]



4. The traditional ways of eating are on the wane

Base: UK nat rep n=2,000; Irl nat rep n=1,004



5. How we eat can often be scrutinised

Just over 90% of Irish consumers worry about what they eat! (Bord Bia, 2018)[5]

Base: UK nat rep n=2,000; Irl nat rep n=1,004



Source: unsplash

7. Sustainable stories

"With six in ten Irish consumers noting they would support a ban on plastic packaging for fruit and vegetables, it could see overall use of loose fruit and vegetables increase in 2019 and beyond.

However prepared fruit and vegetable portions – which require packaging – may need to source more environmentally friendly packaging options."
– Brian O'Connor, Analyst (Mintel, 2019)[6]



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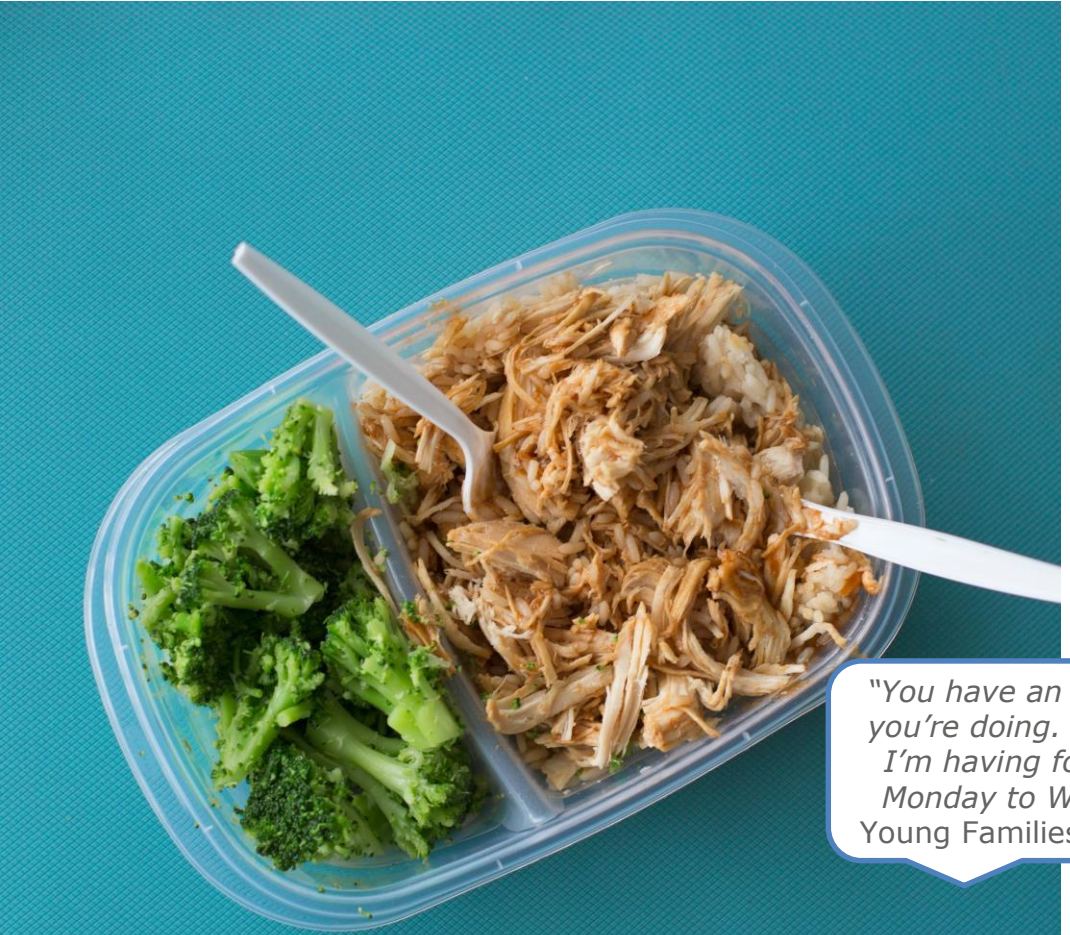
Millennial Culinary Behaviours



Source: PEXELS.COM

Bringing lunch to work is the norm..

"You have an idea of what you're doing. I know what I'm having for my lunch Monday to Wednesday."
Young Families (30-38 yrs)

Bord Bia
Irish Food Board

Batch cooking is part of the weekly routine

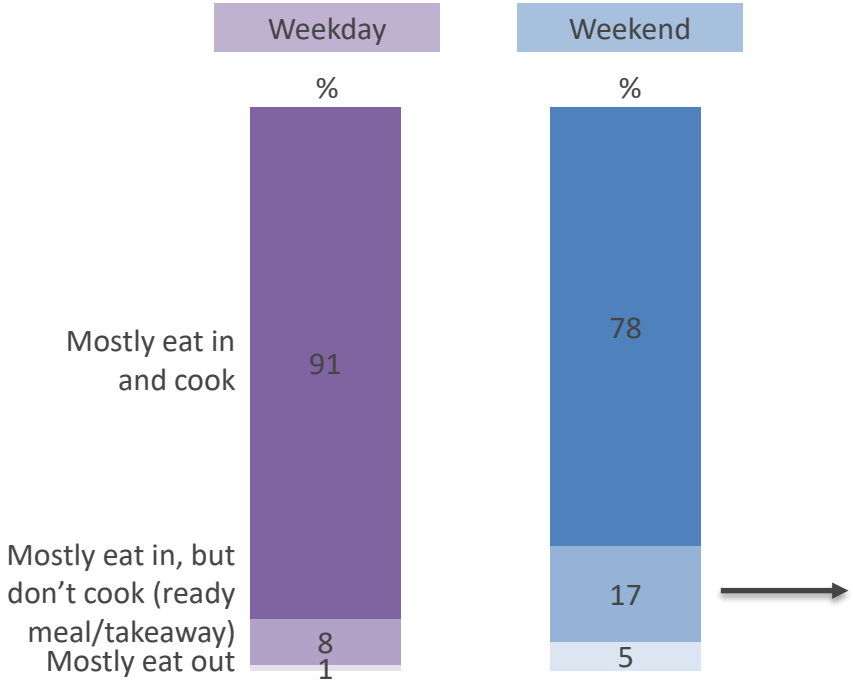
"When you're in college it's like anything goes. When you move to work, most people are so regimented from Monday to Friday that apart from the consistency in their diet, people are more aware of how their lifestyles are set." Younger Millennials (22-29yrs)



"Batch cooking is definitely something that we try and do but it probably leans more towards the things that are easier like curries or chilli con carnes. Essentially what you can stick in a pot." Younger Millennials (22-29 yrs)

Source: Picture ella Olsson pexels.com

Weekends are more about taking it easy on the cooking





Eating In But Not Cooking		
	Weekday	Weekend
Gen Z	15%	33%
Millennials	14%	27%
Gen X	7%	15%
Baby Boomers	3%	7%

Q.33a/b Base: All grocery decision makers – 1,466

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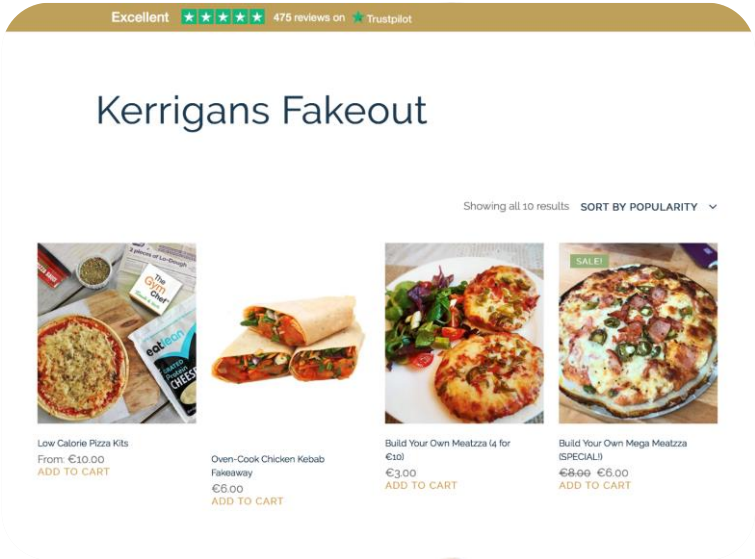
There is a 15-20 minute meal prepping rule during the week..



Source: pixabay.com

A new(ish) food vernacular

"I have to get inventive with my Keto diet… It can get quite boring otherwise." Young Families (30-38 yrs)

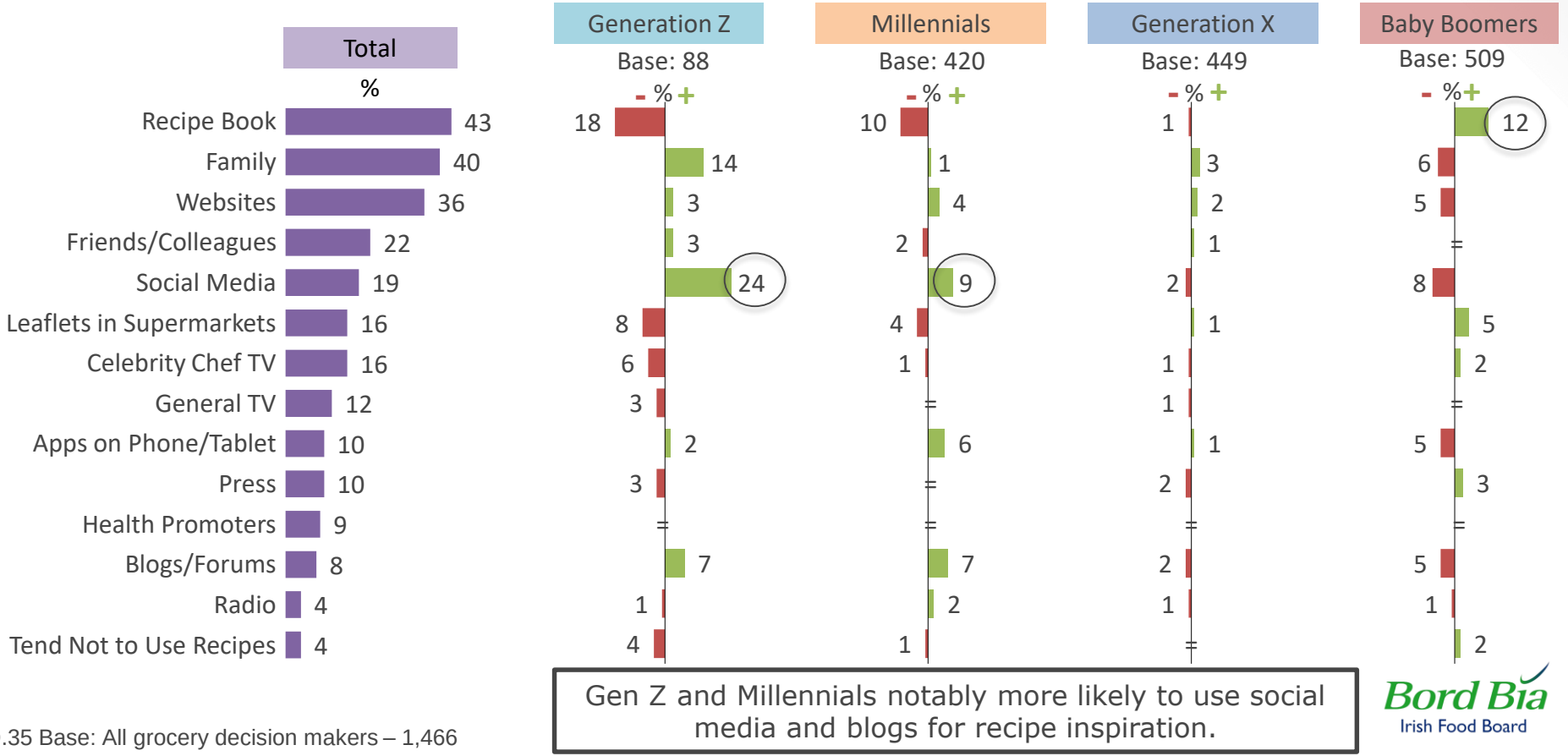


"I find that Kerrigan's and the Dublin Meat Company have got a full range of 'fit-foods' now. They break everything down what is in them and the selection is massive." Young Families (30-38 yrs)



"I wouldn't be a Facebook person but I like Instagram. I follow personal trainers or groups like Slimming World." Young Families (30-38 yrs)

Sources of Recipe Inspiration



Gen Z and Millennials notably more likely to use social media and blogs for recipe inspiration.

Q.35 Base: All grocery decision makers – 1,466

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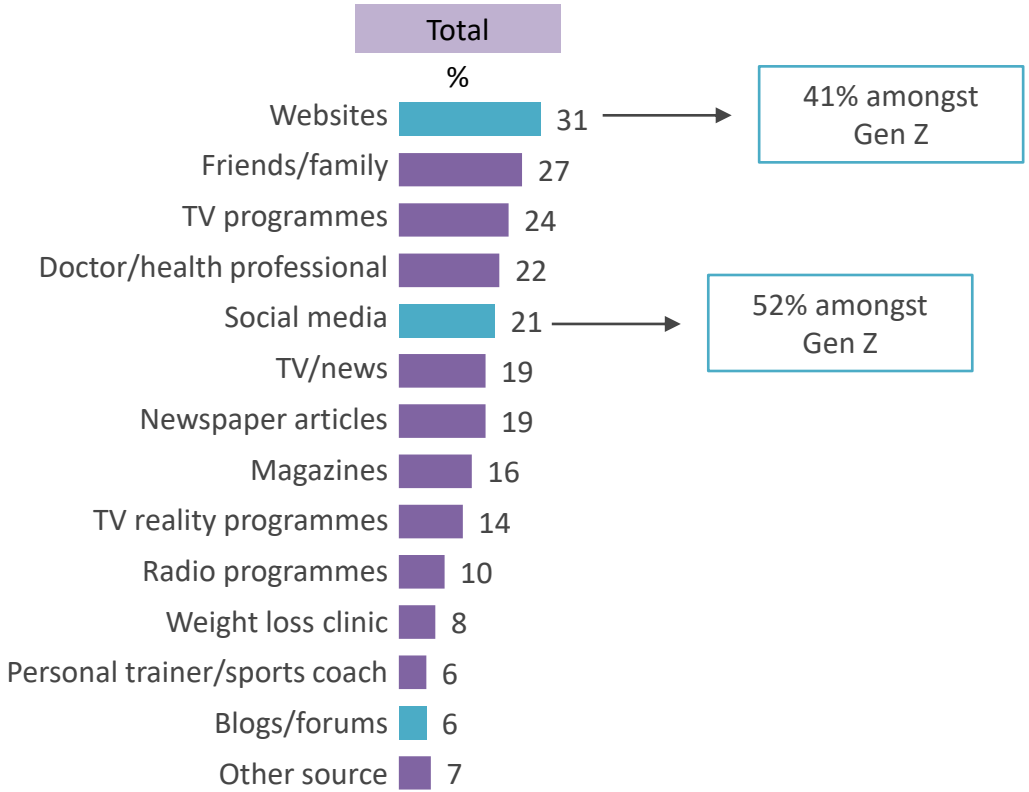
Irish Food Board

Gen z in particular are online focused

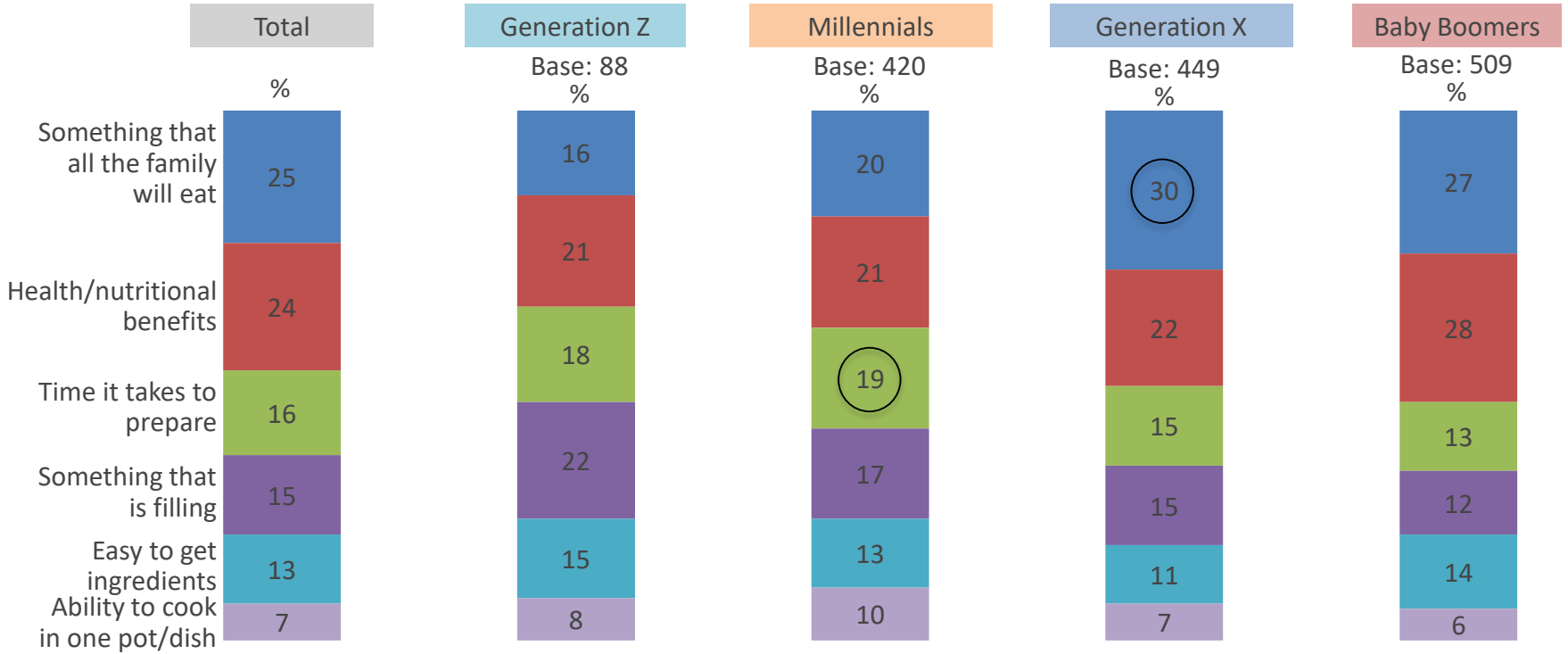


% Using any Websites/ Social Media/ Blogs/Forums	
Total	**45%**
Generation Z	72%
Millennials	53%
Generation X	47%
Baby Boomers	32%

Q.37 Base: All grocery decision makers – 1,466

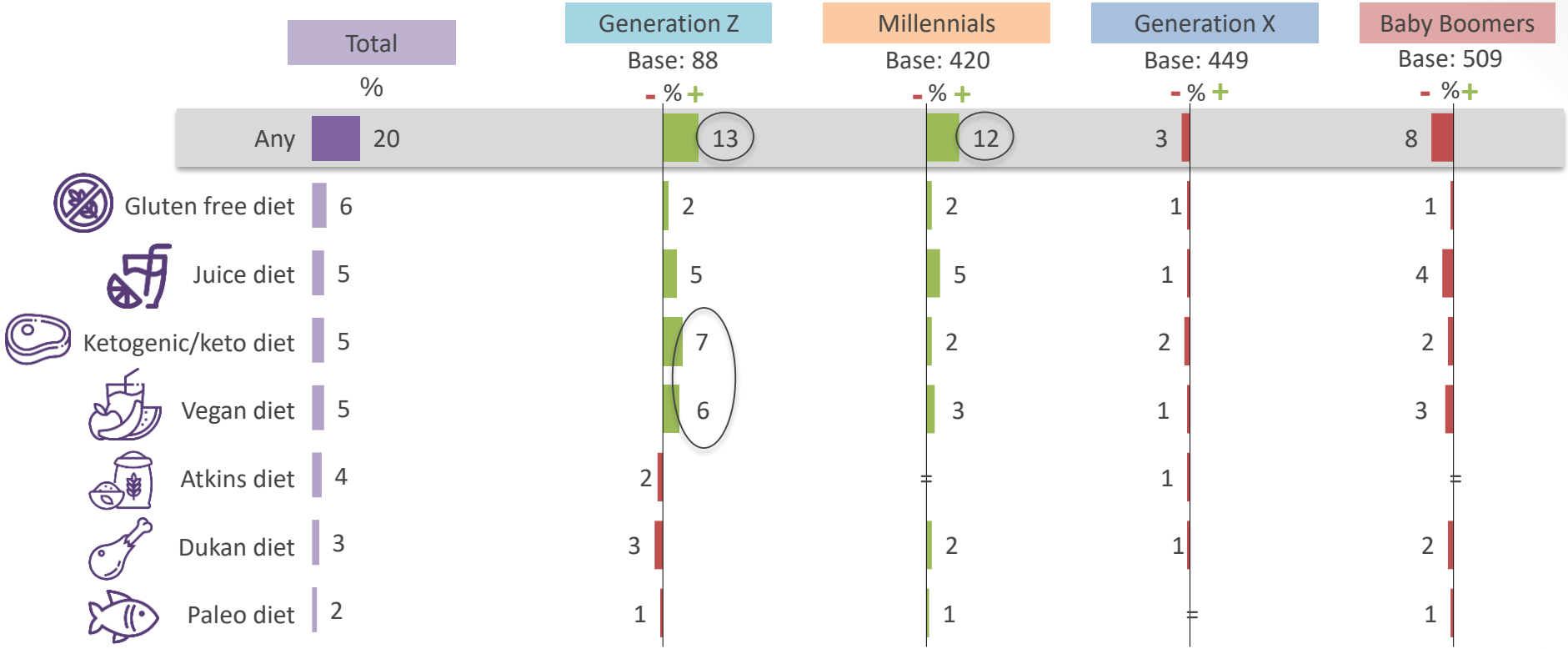
Bord Bia
Irish Food Board

Meal choice drivers slightly nuanced by generation



Q.29 Base: All Grocery Decision Makers – 1,466

Dietary requirements more prevalent amongst millennials



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Q.40 Base: All grocery decision makers – 1,466



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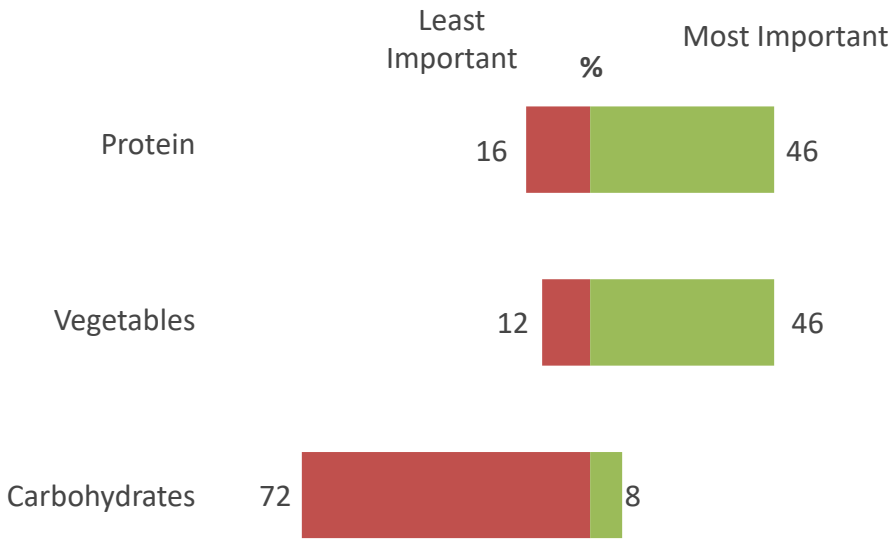
The carbohydrate world

Currently seen as the least important part of the plate





Q.1 Base: All grocery decision makers – 1,466

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The carb under challenge….

"Our research tells us that 15% of the American public is actually following some form of lower-carb, lower sugar approach to eating. We've had a dramatic effect in terms of leading that direction,
Keto, Paleo, Whole 30- all of those approaches are rooted in the concept of lowering carbohydrates and sugars
Scott Parker, Atkins Chief Marketing Officer

The Washington Times

Reliable Reporting. The Right Opinion.

'Carbohydrates are killing us'

By Eric Thorn - - *Sunday, July 8, 2018*

ANALYSIS/OPINION:

ENGLISH ESPAÑOL 中文

The New York Times

How a Low-Carb Diet Might Aid People With Type 1 Diabetes

By Anahad O'Connor

May 7, 2018

Bord Bia
Irish Food Board



Source: unsplash

For those who are consuming “more” it’s because 60% of people like them with 1 in 2 saying they taste great

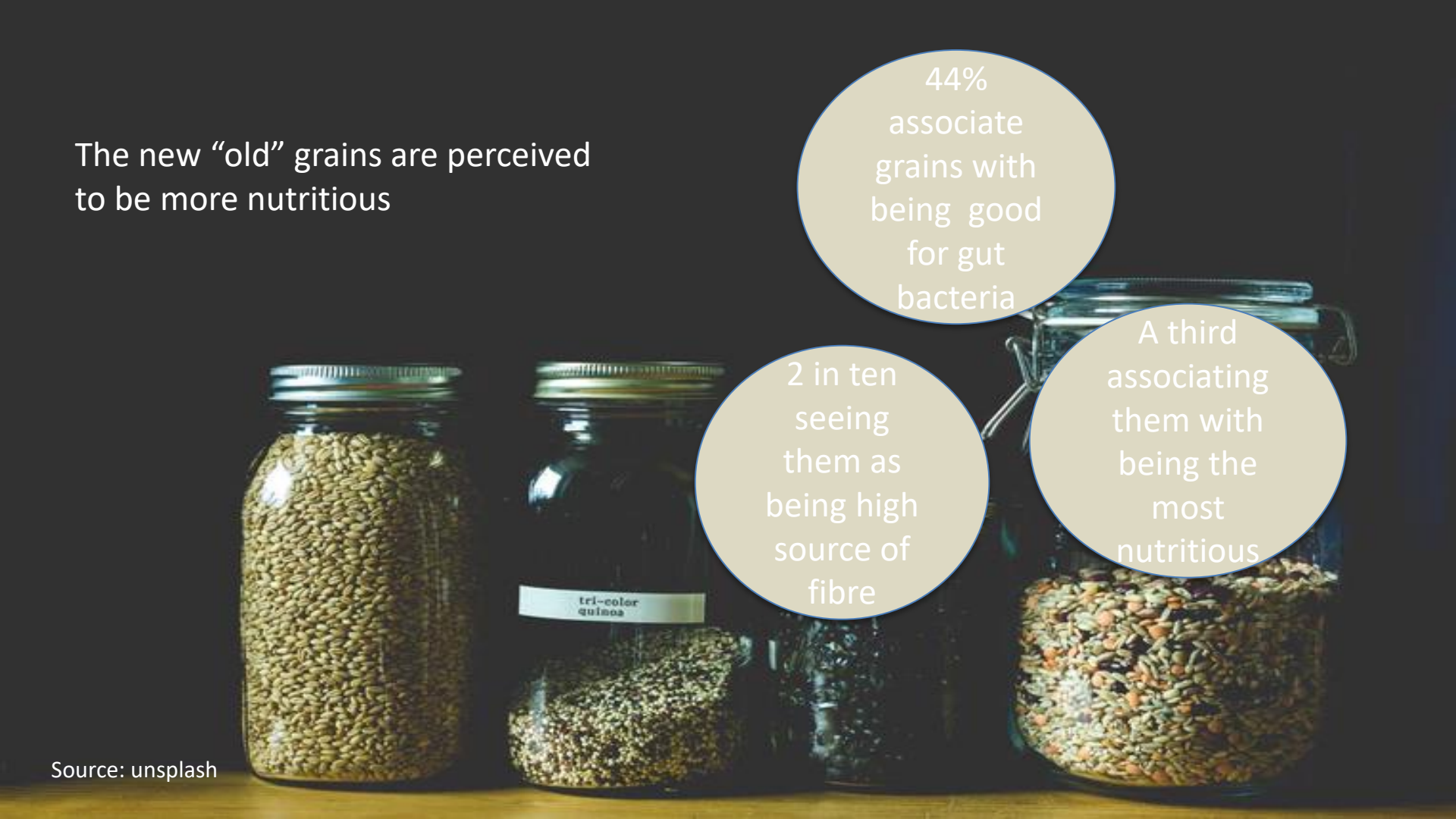
“It’s just one meal that the whole family can eat.” Young Families (30-38 yrs)

“They are a superfood.” Young Families (30-38 yrs)



Source: unsplash

The new “old” grains are perceived to be more nutritious



Source: unsplash

Whole grain rice gives all rice a “halo” effect and is understood to be more nutritious and probably enhances white rice consumption

Brown rice does not appear as popular as white however

Rice consumption is up since 2012

“Brown rice is definitely better for you than white rice.” Younger Millennials (22-29 yrs)

“I’m eating less of processed food, frozen food, quick-meals. But I probably don’t eat that much brown rice or pasta either.” Younger Millennials (22-29yrs)

“More rice during the week. Potatoes during the week just take so long to cook.” Younger Millennials (22-29 yrs)



Source: unsplash



Where people are consuming more potatoes

50% of people are doing so because of awareness of higher fibre content

35% of this cohort are millennials

Bord Bia
Irish Food Board



Source: unsplash

Pasta is strongly associated with speed with 71% saying see it as quickest to cook and prepare

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Irish Food Board

Enter the pasta generation



While “better than some” the majority of millennials do not understand the health credentials of the potato associating them with fat and calories

Potatoes - “Clean carbohydrate source. If you compare some other things that might be on the table… you would much rather than a baked potato than a wrap that has a 6 week shelf life.” Younger Millennials (22-29 yrs)





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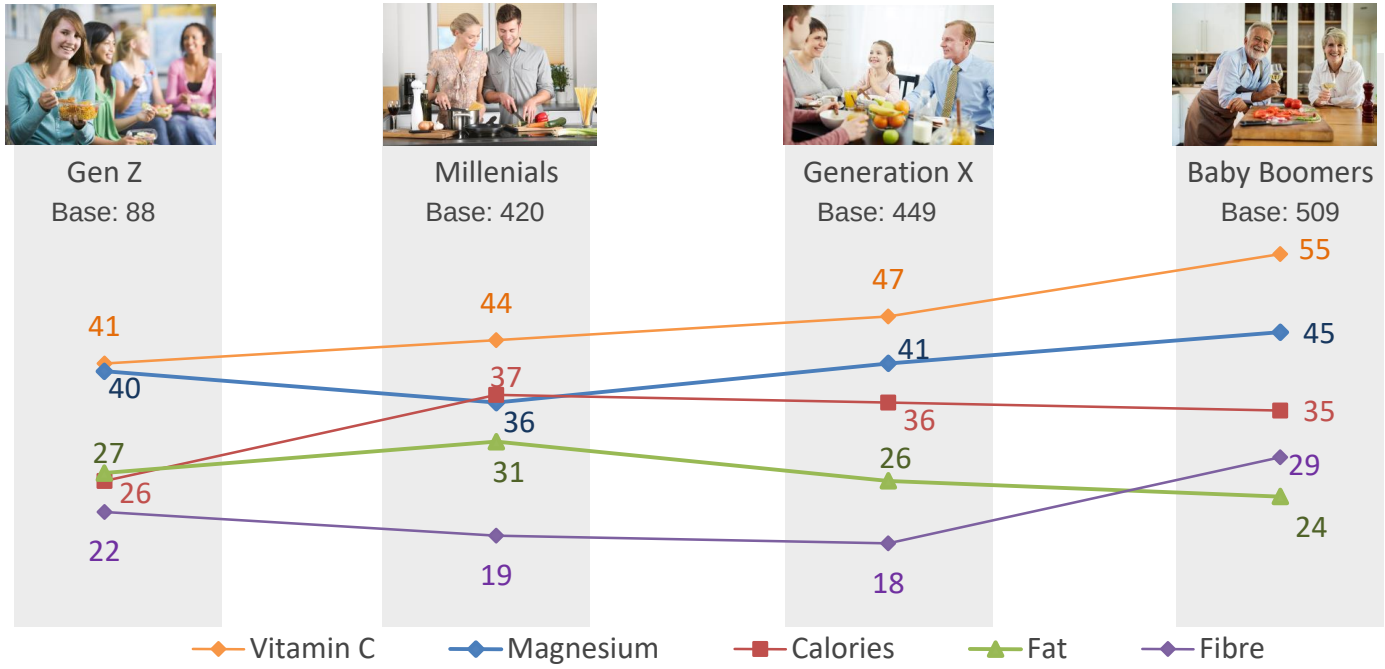
Potato Perceived Health Benefits x Age



Older age cohorts more likely to think potatoes have the most vitamin c, magnesium and fibre. Whilst Millennials are most likely to think they have the most fat and calories.

Q.2 Base: All grocery decision makers – 1,466

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Irish Food Board



Eating potatoes in a “tasty” way often involve considering “less good for you” toppings, etc

“There’s no taste off a boiled potato compared to a roast potato.” Younger Millennials (22-29 yrs)

“You’d want to lash butter, milk, salt into it. Potatoes would taste nothing without it and this would raise the calories.” Younger Millennials (22-29yrs)

“There’s a wealth of things out there that’s a lot tastier that a boiled potato.” Younger Millennials (22-29 yrs)

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Carb Personification

Potato

GAA Player
Older
Frugal
Farmer
Male
Paddy



Middle-Aged
Boring
Bland
Country
Male
Bloated

Rice



Hipster
New
Millenials
Modern
Young
Male



Quinoa

Traditional
Warm
Italian
Female
Friendly
Voluptuous



Pasta

Wrap



Cheeky
Young
Decieving
Hard-Worker
Lighter
Fresh
Labourer

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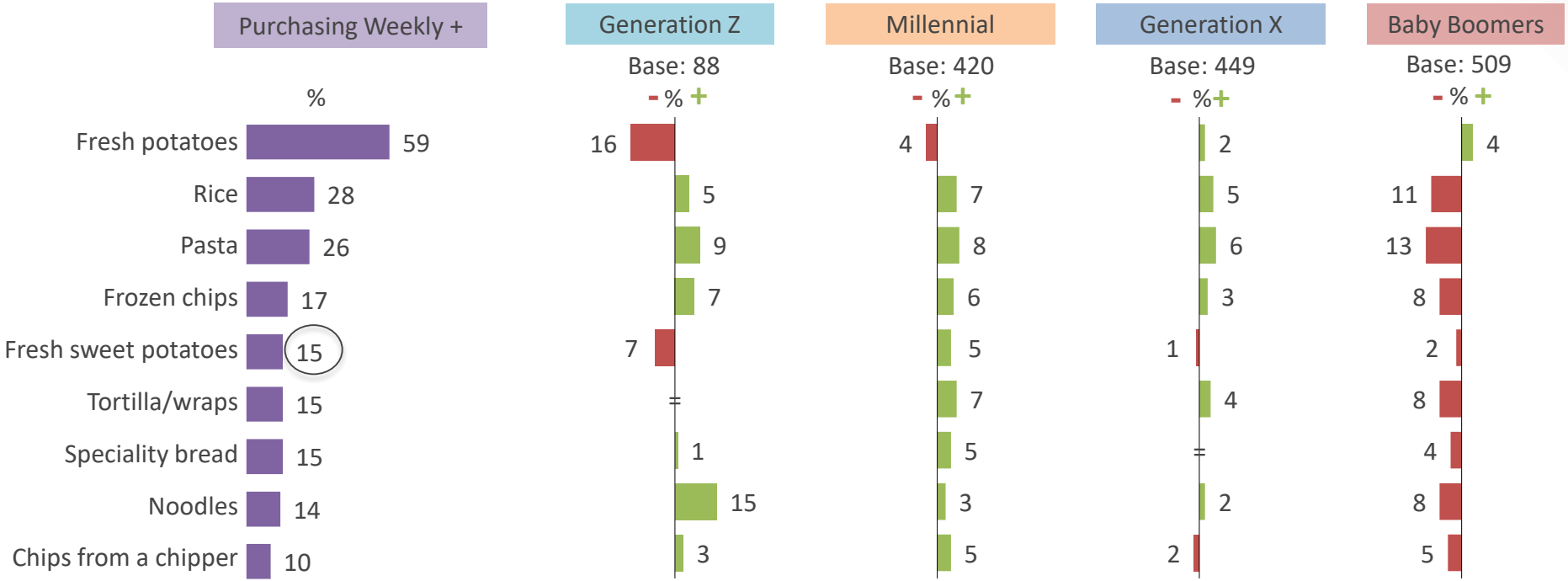
Carbohydrate Purchasing: The Who

Potatoes still the heartland of older cohorts - I



Q.4 Base: All grocery decision makers – 1,466

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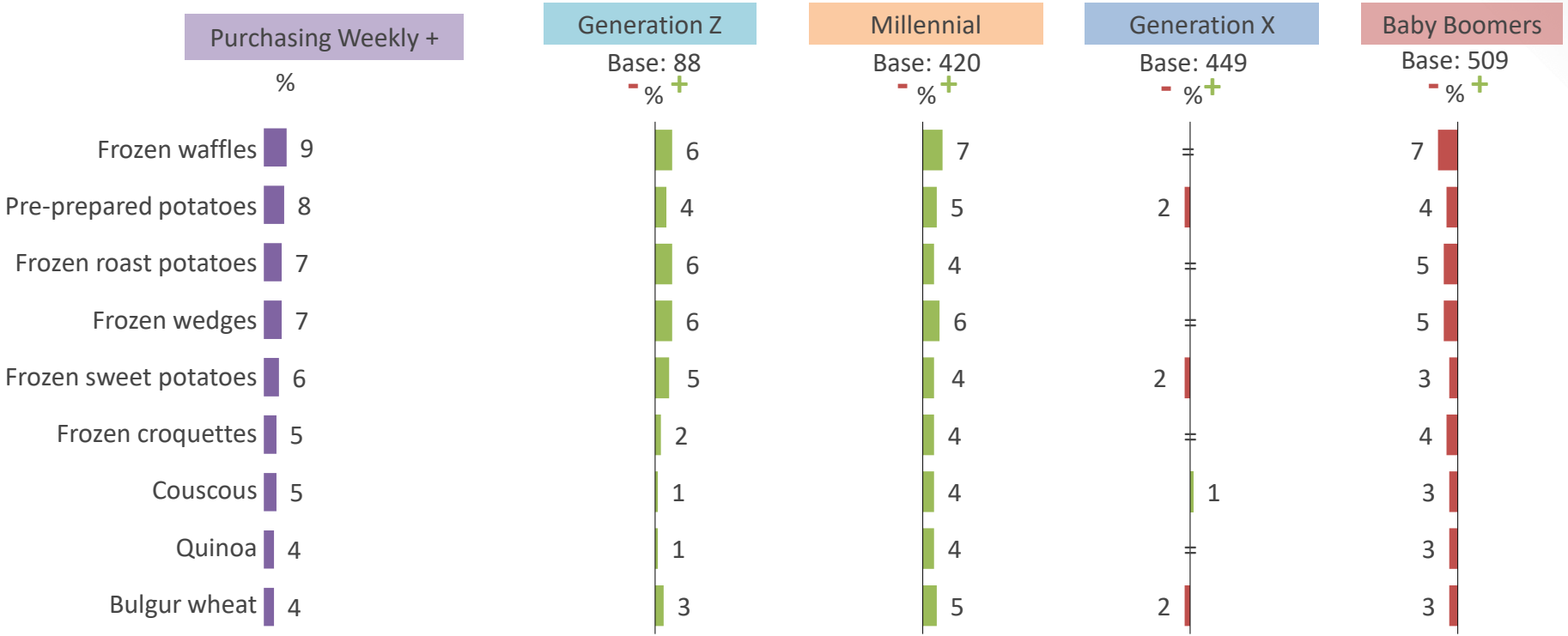
Potatoes still the heartland of older cohorts - II



Q.4 Base: All grocery decision makers – 1,466

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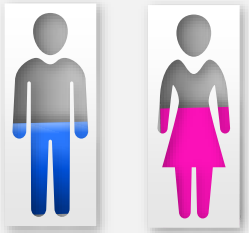
The Potato Purchaser breakout..

Purchasing Potatoes Weekly+

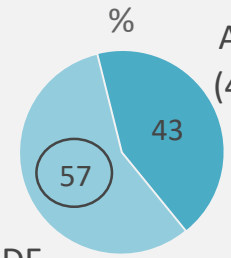
Gender



46% (49%)

54% (51%)

Social Class



Generation



Ave Weekly Carb Consumption

3.6 (3.1)	Potatoes
1.2 (1.2)	Frozen Potatoes
1.4 (1.5)	Pasta
1.6 (1.7)	Rice
0.9 (0.9)	Tortillas
0.49 (0.6)	Grain

(%) = Nat Rep



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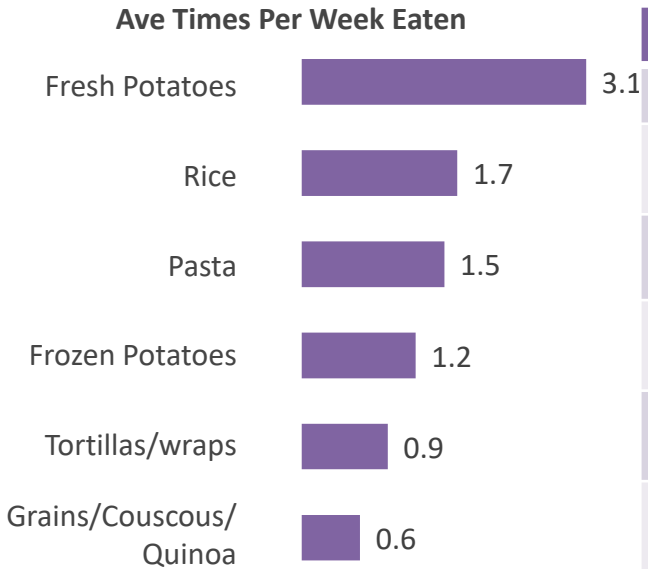
Potatoes still the most consumed “carb” by all, with millennials gravitating towards other carbs



	Segment (average time eaten per week)			
	Gen Z	Millennials	Generation X	Baby Boomers
Fresh Potatoes	2.7	2.7	2.8	3.7
Rice	2.7	2.1	1.6	1.2
Pasta	2.3	2.0	1.5	1.0
Frozen Potatoes	1.9	1.5	1.2	0.9
Tortillas/wraps	1.5	1.4	0.9	0.4
Grains/Couscous/ Quinoa	0.7	1.0	0.6	0.4

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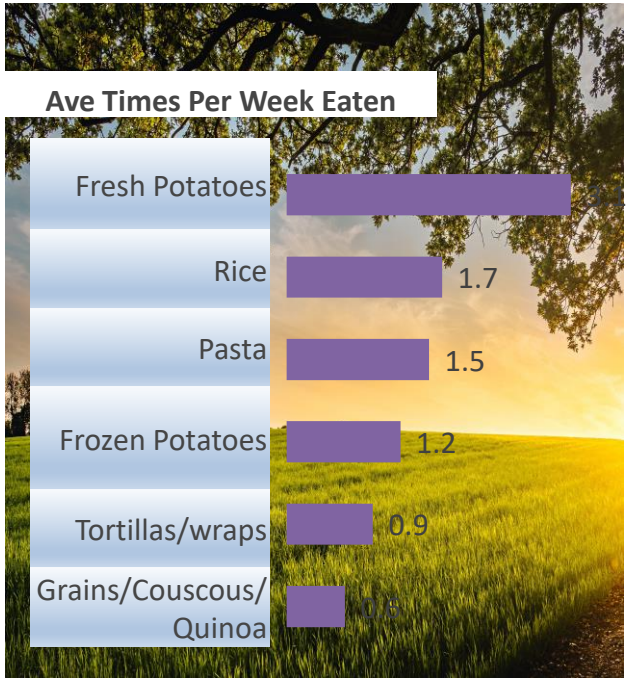
Q.18 Base: All Grocery Decision Makers – 1,466

It's a rural thing..



Region				Household			
Dublin	ROL	Munster	Conn/ Ulster	On Own	With Partner	With Children	Other
2.9	3.1	3.1	3.3	2.9	3.5	3.0	2.7
2.0	1.6	1.5	1.6	1.5	1.6	1.6	2.1
1.7	1.5	1.4	1.5	1.5	1.4	1.6	1.8
1.3	1.3	1.2	1.2	1.1	1.1	1.3	1.5
1.1	0.8	0.9	1.0	0.7	0.8	1.0	1.2
0.8	0.6	0.5	0.7	0.6	0.6	0.6	0.7

Potatoes are a slightly less urban and more family oriented consumption experience

Q.18 Base: All Grocery Decision Makers – 1,466

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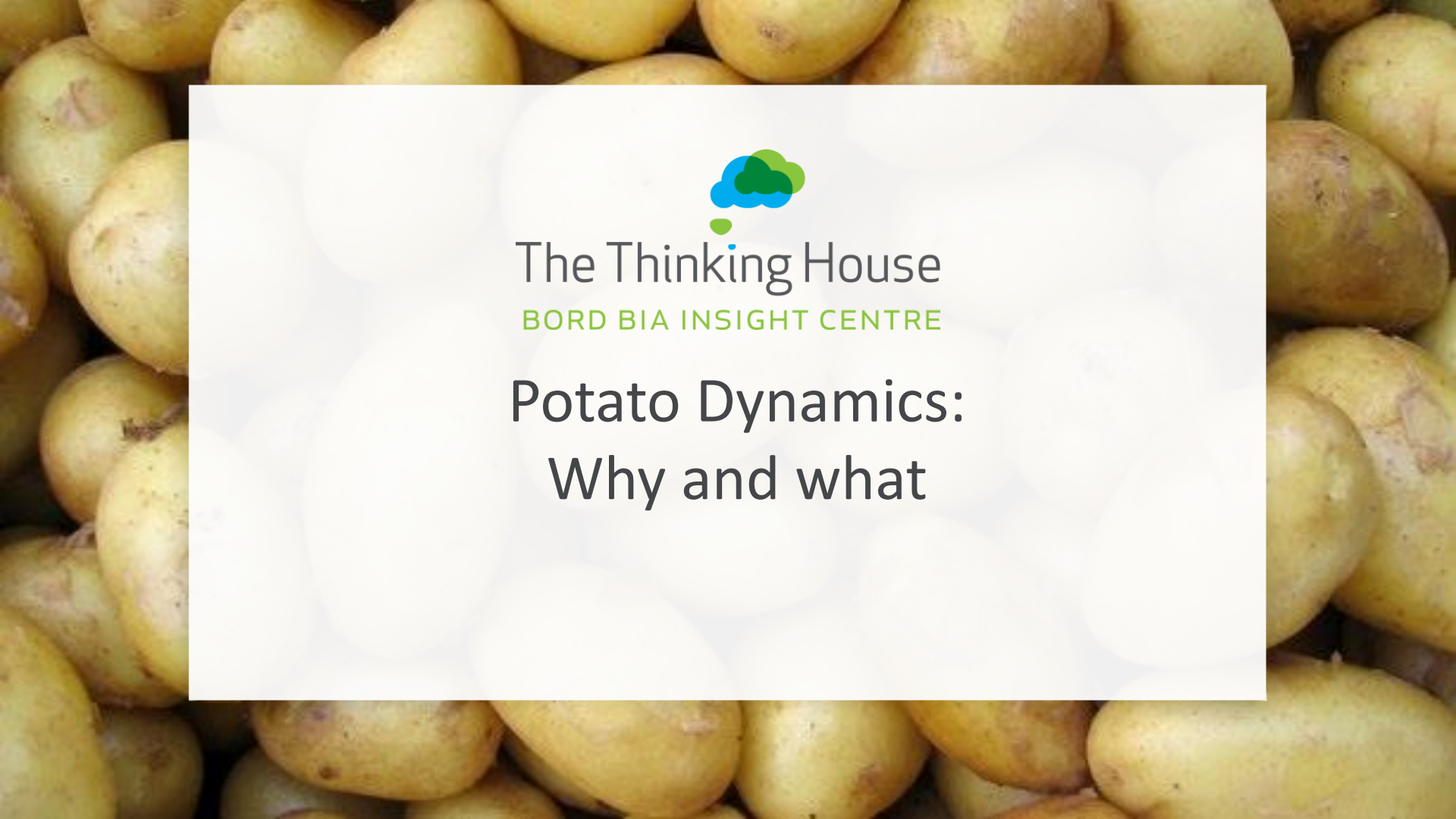

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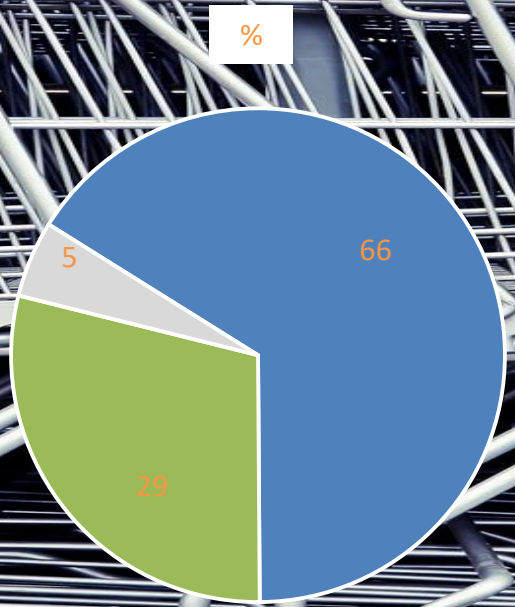
Potato Dynamics: Why and what

An autopilot shop



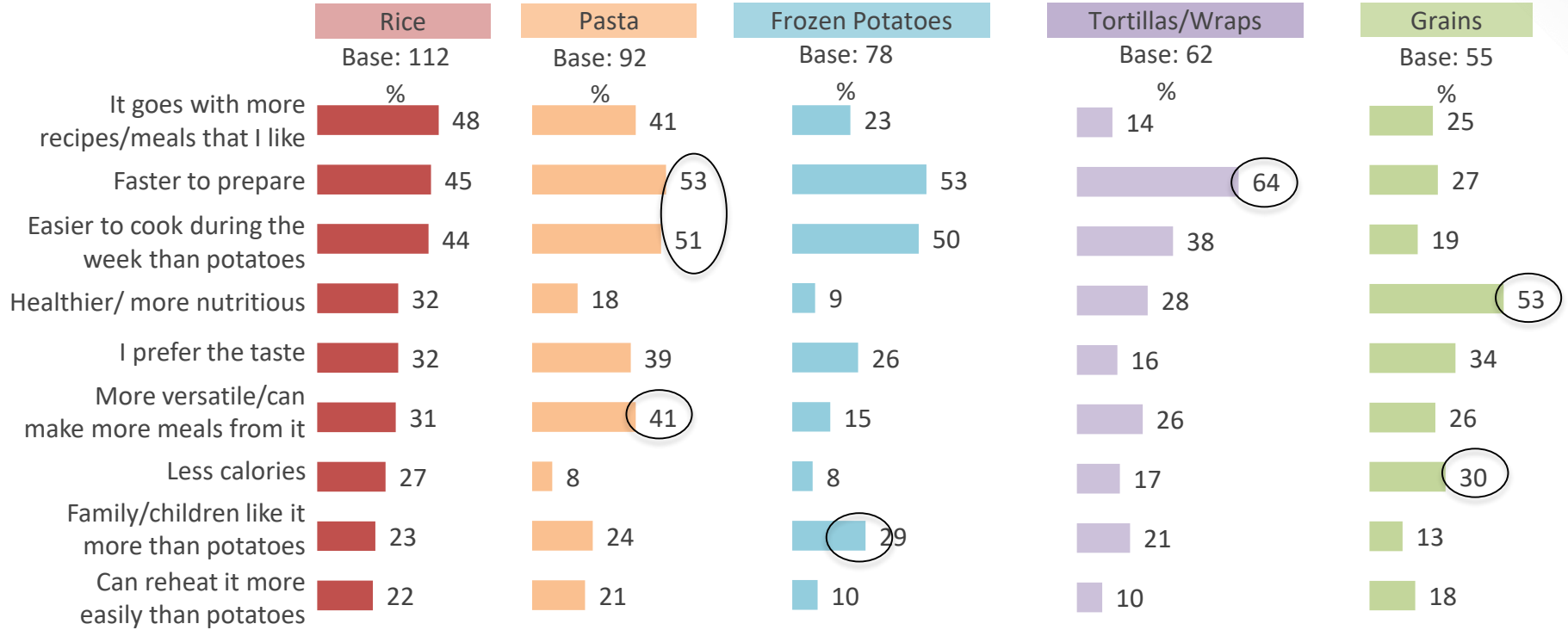
I only decided to buy potatoes when I was in the shop

I knew exactly the potato products I wanted to buy

I knew I wanted to buy potatoes, but only decided on type/ pack when I got there

Q.12 Base: All who bought potatoes in last purchase – 1,159

Drivers across alternative carbs are about convenience, health and better working options



*All Other = < 10%

Q.19 Base: All eating more alternative carbohydrates.

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Millennials and younger people have less of a reason why for potatoes





Older cohorts seek out variety and provenance

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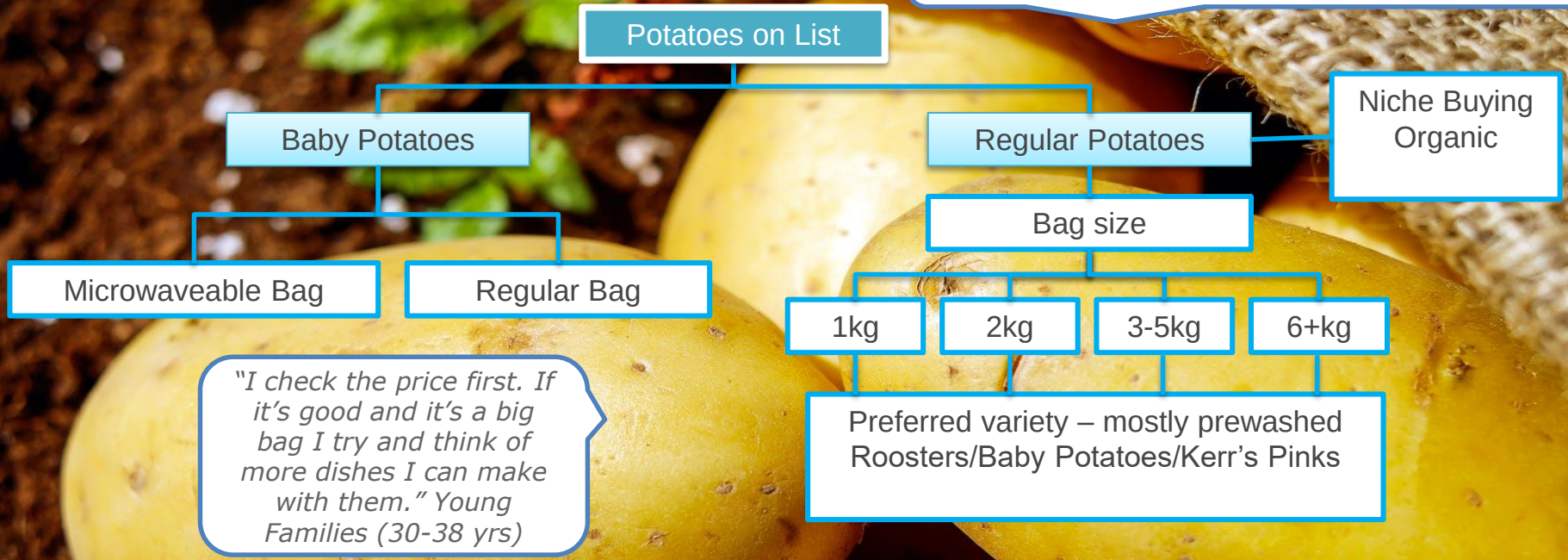
A tale of two halves

"I still absolutely love them but I just don't eat as much. Like I would never buy a bag the size that my mother buys." Younger Millennials (22-29 yrs)



"I check the price first. If it's good and it's a big bag I try and think of more dishes I can make with them." Young Families (30-38 yrs)

- Very simple decision tree funnel as price is not considered to vary across supermarkets – all options considered good value for money.
- Packaging/bag size most important consideration for portion control and storage.
- Majority buying prewashed "red" Roosters or baby potatoes.

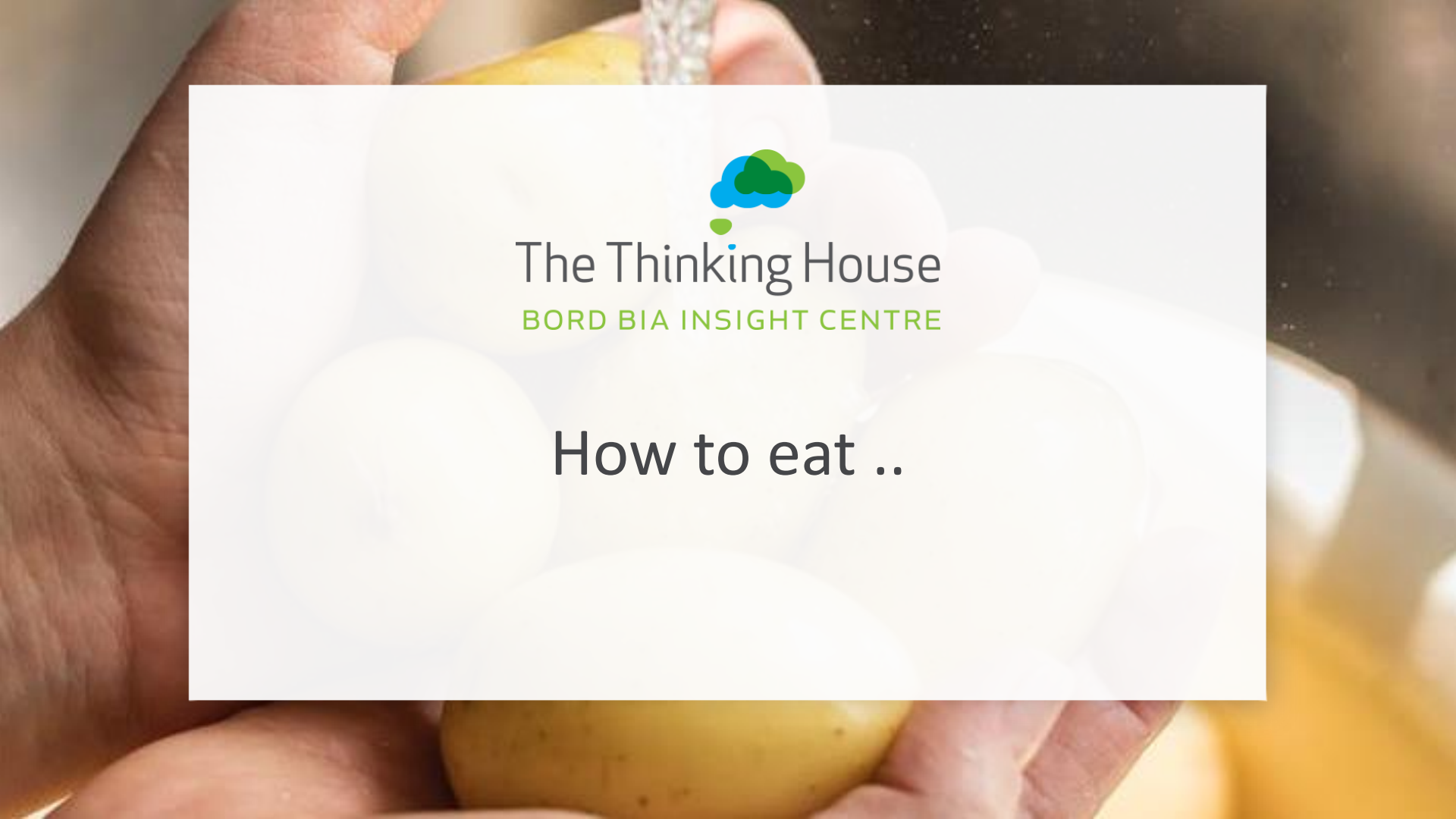
Understanding of brands limited and varieties challenged



78% don't know any brands

35% don't know any variety spontaneously, especially younger cohorts
61% Gen Z
47% Millennials

Roosters had highest recognition but baby potatoes awareness levels up 20% since 2012



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How to eat ..

Still associated with meat and two veg

Boiling and mashing..

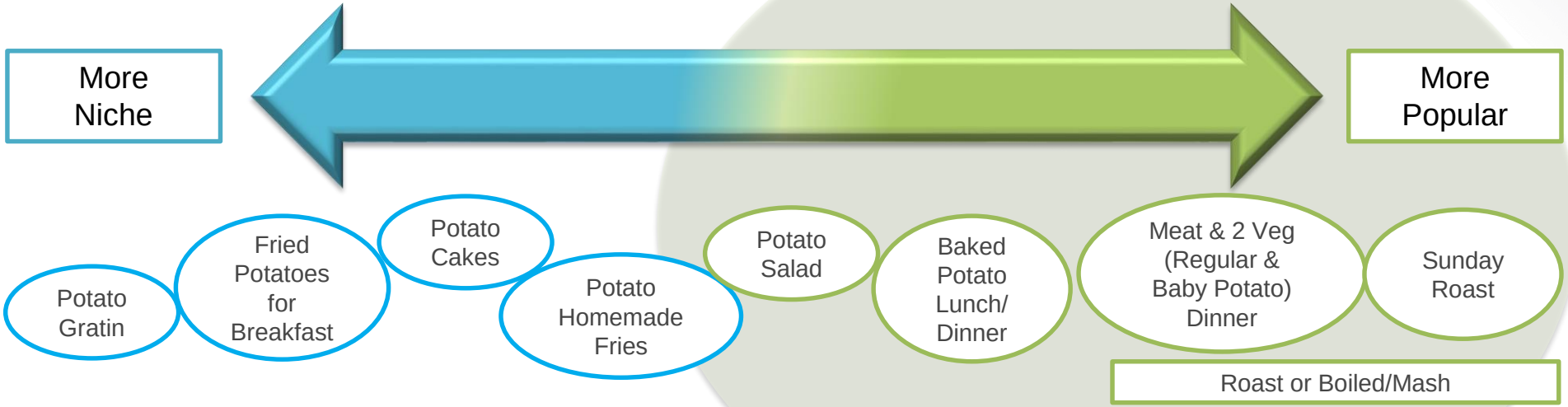
Roasting at the weekend





Over 4 in 5 ate potatoes on last meal with the majority boiling or mashing

It's a main meal and big occasion mentality



- Roast and mash equally suitable for main meal/popular.
- Minority/niche eating potatoes for lunch – more likely baked potato with topping.
- Niche frying leftover potato for breakfast.

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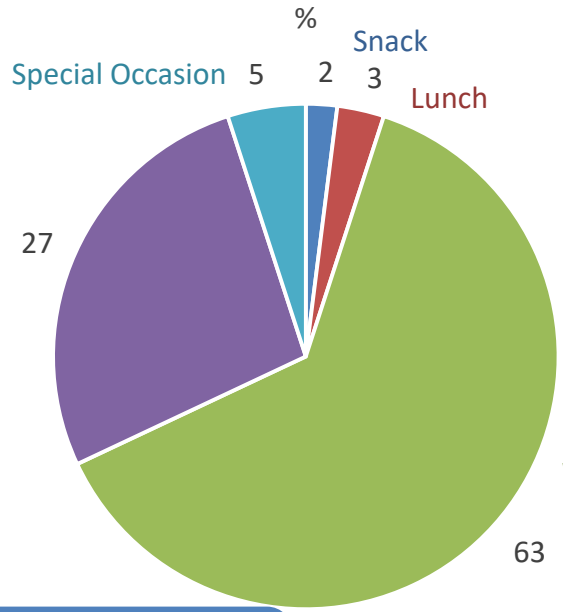
Gen X and boomers more likely to have potatoes mid week



Generation	
Gen Z	31%
Millennials	28%
Gen X	28%
Baby Boomers	24%

Generation	
Gen Z	51%
Millennials	56%
Gen X	62%
Baby Boomers	71%

"On a Sunday, it's a free-for-all; I would eat every single type of potato at the weekend." Younger Millennials (22-29 yrs)

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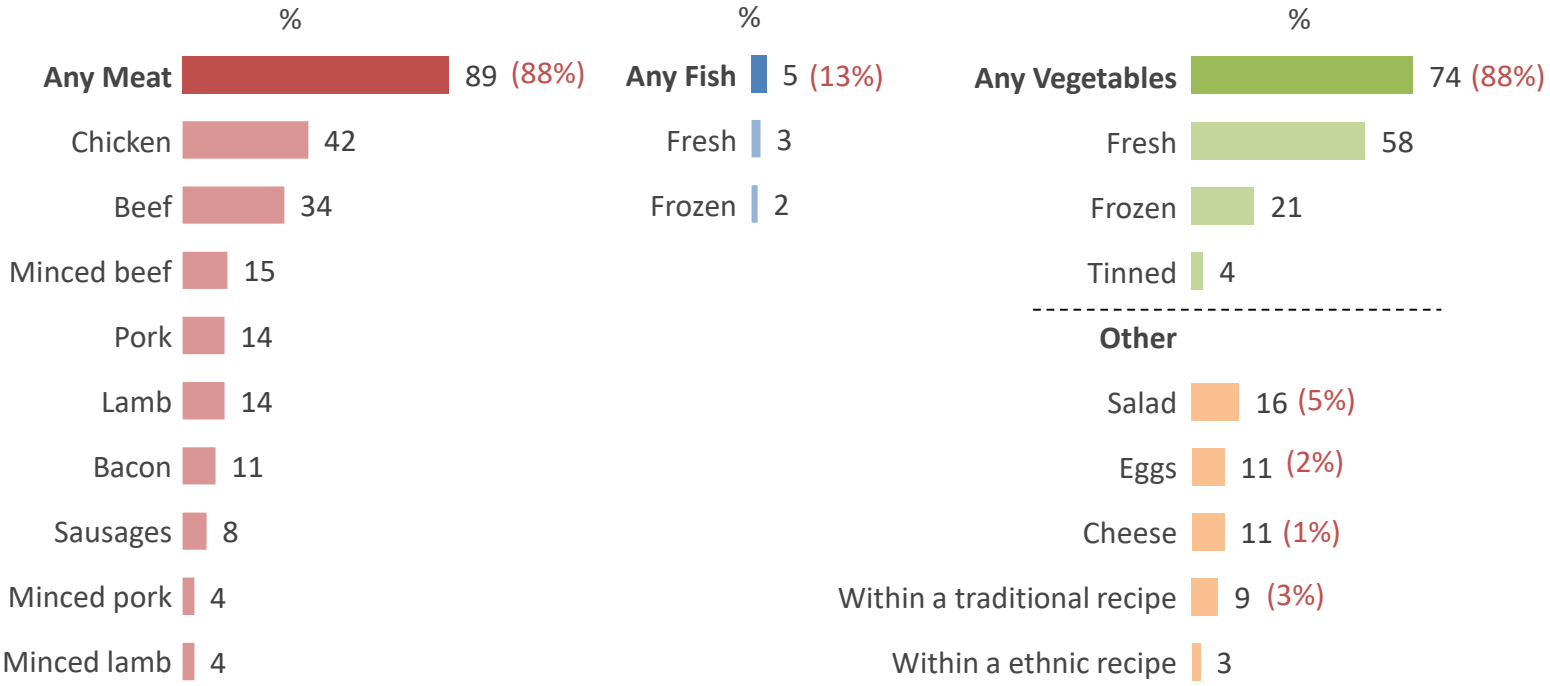
Q.24 Base: All Ever Cooked Potatoes - 1451

There is a trend towards consuming with salads and alternative proteins



Potatoes more likely to be served with meat and vegetables.
However increase in serving with salads, eggs, cheese versus 2012.

(%) = 2012 Results

Q.28 Base: All Ever Cooked Potatoes - 1451

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Ignite
New news
Strength
Presentation
Potato Platforms that I.N.S.P.I.R.E. Millennials and Beyond
Indulgence
Relevant
Educate

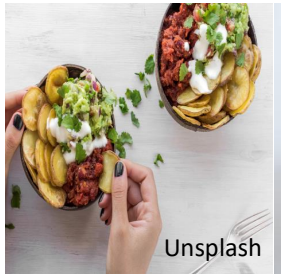
Ignite

- New ways to eat that are “tasteful”
- “Bring bite into boiled”..healthier options
- New recipes and new food fusions
- New ways to eat week, weekend
- Play to the diets of today
- Instagramize..potato pimping..
- Engage consumers in store- provide complementary meal accompaniments

Kepak: Beefroot burger









Fazer: Greener breads with 33% vegetable content



Stretchy

“If people don’t see others using them on Instagram, they’re going to think straight away ‘oh I shouldn’t use them’.” Young Families (30-38 yrs)

“Taste would be a big one for me.” Younger Millennials (22-29yrs)

New news

- The various health benefits that win:
- Fibre, gut, magnesium
- Potatoes as “better” carbs (fat comprehension)
  This is about potato power..
  ..unlocking the superfood within
- Creating new opportunities such as “Lotatoes”
  Or enhanced potatoes







Stretchy

Strength

- The potato as strong, let the potato be taken seriously!
  ‘A *better* carb’
- Rightful place in the fitness world
- Rightful place in the dietary world of today
- How different potatoes might be better for different needs: satiety, energy, etc
- Role of skins



Presentation

Formats that win:

- Celebrate comfort, family fun
- Weekly fast foods,
- Foods for one
- Easy prep – speed of cooking
- Sustainable stories
- Celebrate in the aisles in store









"They're time consuming."
Young Families (30-38 yrs)

Indulgence

"Bringing family together." Younger Millennials (22-29yrs)

- Play to comfort
- Celebrate roasts and weekend moments
- Don't shy away
- Celebrate indulgence for tastefulness
- Play to togetherness
- Play to premiumness

Create potato pride

"Truffles of the earth"







Relevance

"Having to peel them if you don't have the baby potatoes takes time." Younger Millennials (22-29 yrs)

- Create the right tone of voice
- Consider what millennials want from food
  - More snacking opportunities, etc
- Language, nutritional info, provenance

Consider households and the way people live

Can we save on chopping



"They don't keep that well." Younger Millennials (22-29 yrs)

"It's a culture at the moment that people are big into their health and fitness. You don't see influencers on social media using potatoes. They're using sweet potato." Younger Millennials (22-29 yrs)

Educate..about potatoes

- Different types
- Create a lexicon language
  "*Boiled floury crispy crunchy*"
- What potatoes are cooked the best way,etc
- What potatoes are good for batch cooking
- Ways to cook and how long it takes to cook!

Source: Seriouseats.com

The Food Lab: How to Roast the Best Potatoes of Your Life

THE FOOD LAB / Unraveling the mysteries of home cooking through science.

J. KENJI LÓPEZ-ALT • PROFILE / TWITTER / FACEBOOK / CONTACT

"Sometimes I don't know what ones to buy. I might be in the super market and still not know how I'm going to cook them. I have to ask someone beside me about which ones would be best." Young Families (30-38 yrs)



"They're not great for batch cooking." Younger Millennials (22-29yrs)

"I'm afraid that they'd boil dry, that you'd have to stand over watching them and couldn't go off like if you left them in the oven." Younger Millennials (22-29 yrs)

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End

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