

A top-down photograph of a person with dark hair, wearing a light blue long-sleeved shirt, sitting at a white desk. They are holding a fork and eating from a clear plastic container filled with a salad. On the desk, there is also a notebook with a blue pen, a smartphone, and a tablet. A semi-transparent blue rectangular box is overlaid on the center of the image, containing the title text.

## **EFFECT OF COVID-19 ON CAMBODIAN CONSUMER EATING HABITS**

**Prepared by:  
MRTS Consulting Ltd  
10 October 2021**

A close-up photograph of two people shaking hands. The person on the left is wearing a light-colored, possibly grey, long-sleeved shirt. The person on the right is wearing a dark blue suit jacket over a light-colored shirt. The background is blurred, showing warm, yellowish light, suggesting an indoor setting with large windows or a bright interior. A blue rectangular box with the word 'Background' in white text is overlaid on the right side of the image.

# Background

# CONTEXT

- **Covid-19 has been impacting the lifestyle of people in a significant manner**
- **Eating habits of consumers have changed, which is causing a change in the market of food and food seasoning in Cambodia**
- **MRTS Consulting Ltd. wished to understand the changing consumer habits during Covid-19 which has started impacting the household and food service market**
- **This study was conducted in Phnom Penh in Sept-Oct 2021**
- **The findings of the study are presented in this document**

# METHODOLOGY & TARGET AUDIENCE

## Methodology

- **Quantitative survey**
- **Using a structured questionnaire**
- **The survey was administered via self complete with an online link**

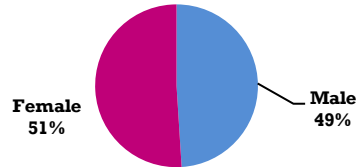
## Target Audience

- **Men and women**
- **Aged 25-45 years**
- **Married / unmarried**
- **From households with MHI USD 300-800 (SEC BC)**
- **Respondents being – households, white collared workers, Govt. Officers, others**

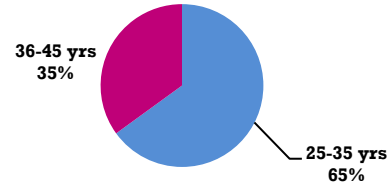
# PROFILE OF RESPONDENTS

***Total Sample Size: 164 respondents***

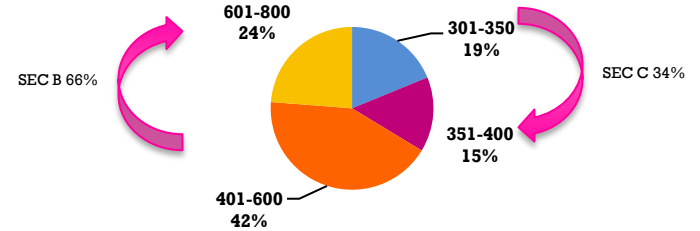
**Gender**



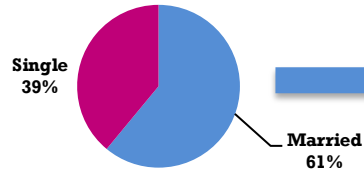
**Age**



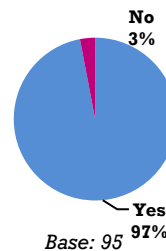
**MHI (USD)**



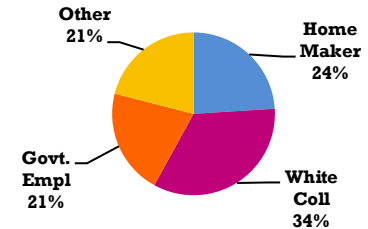
**Marital Status**



**Children**



**Occupation**



# NOTES FOR READERS

## Testing of Statistical Significance

- Statistical significance testing has been done for all data cuts compared to 'Total', to understand if any segment of consumers behaves differently compared to the overall audience
- Testing has been done at 95% significance
- Numbers in **green** are higher than overall, those in **red** are lower

## Calculation of Wtd. Avg. Consumption Frequency

- The logic that has been used for avg. monthly consumption is in multiples of 4 weeks



Consumption Frequency	No. of times / month
Almost everyday (7 times)	28
6 times a week	24
5 times a week	20
4 times a week	16
3 times a week	12
2 times a week	8
1 time a week	4
Once a fortnight	2
Once in 3 weeks	1.3
Once a month	1
Less often / Never	0

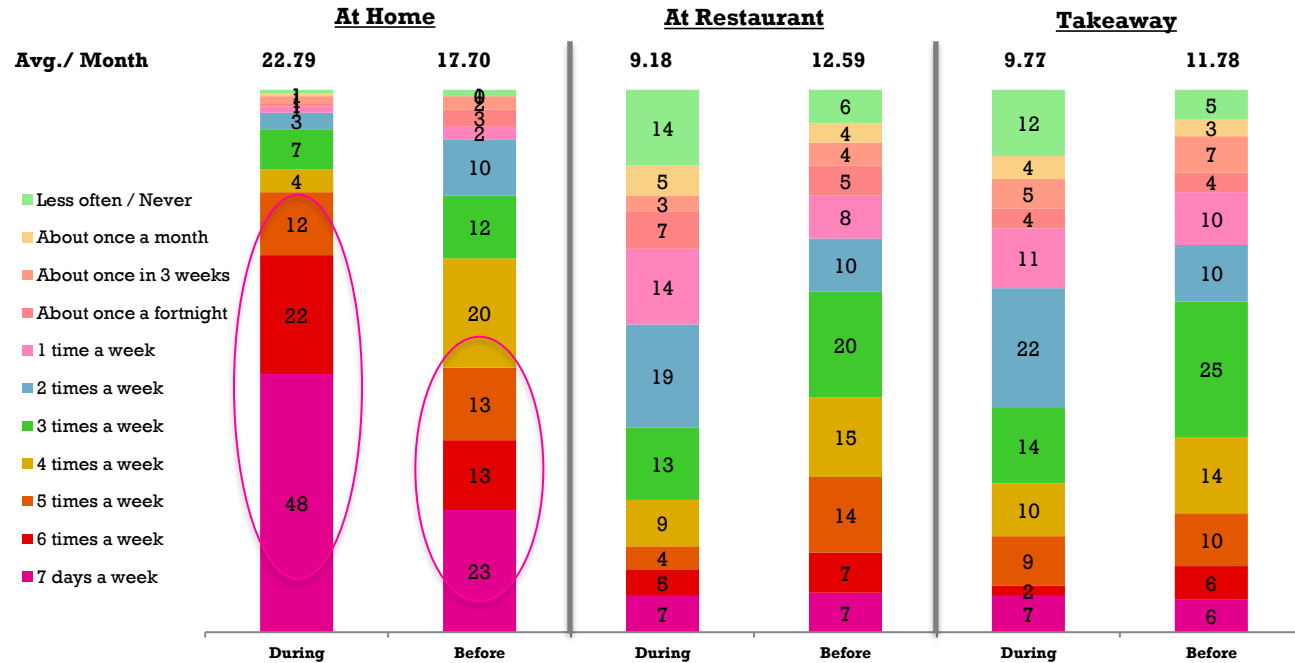


# Findings

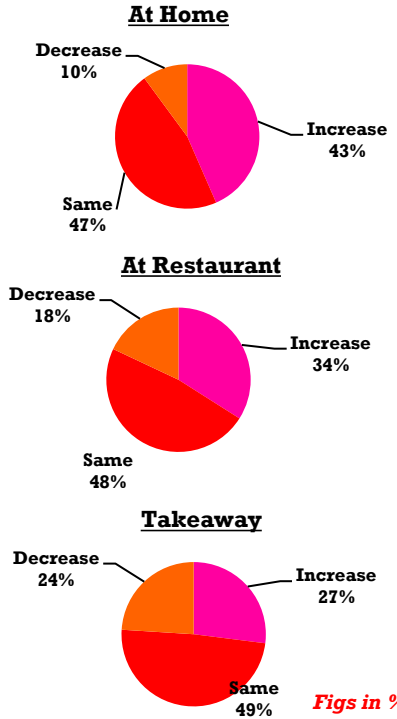
# SNAPSHOT OF BREAKFAST OCCASSIONS

- Majority seem to have breakfast at home during COVID; substantial increase in lunch consumption at home during COVID times compared to earlier, lunch from restaurants and takeaways lower
- Post COVID, 4 in 10 consumers believe that their lunch consumption at home will increase compared to what it was before COVID; nearly half believe that it will be the same as before COVID
- Nearly half claim that their breakfast habits in restaurants / takeaway will remain the same as earlier; 3 in 5 believe that it will increase and about 2 in 5 believe that it will decrease

## Habits During and Before COVID



## Perceptions after COVID





# BREAKFAST OCCASSIONS AT HOME DURING – BY RESPONDENT TYPES

- Breakfast at home during COVID
  - Higher compared to earlier among females, married, SEC B, home makers and others
  - Lower among males, single, SEC C, and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	48	48	48	50	42	39	53	50	42	55	46	38	50
6 times a week	22	20	24	20	26	19	24	19	27	28	21	24	15
5 times a week	12	11	12	10	14	11	12	14	7	8	13	12	15
4 times a week	4	4	5	5	4	9	1	3	7	0	7	0	9
3 times a week	7	8	7	8	5	13	4	9	4	3	5	15	9
2 times a week	3	4	2	2	5	3	3	2	5	3	2	6	3
1 time a week	1	1	1	0	4	0	2	2	0	3	2	0	0
Once a fortnight	1	1	0	1	0	2	0	1	0	0	2	0	0
Once in 3 weeks	1	3	0	2	0	3	0	0	4	0	2	3	0
Once a month	1	0	1	1	0	0	1	0	2	3	0	0	0
Less often / Never	1	1	0	1	0	2	0	0	2	0	0	3	0
<b>Avg. times / Month</b>	<b>22.79</b>	<b>22.26</b>	<b>23.30</b>	<b>22.86</b>	<b>22.67</b>	<b>20.95</b>	<b>23.97</b>	<b>23.28</b>	<b>21.81</b>	<b>24.13</b>	<b>22.70</b>	<b>20.98</b>	<b>23.18</b>

# BREAKFAST OCCASSIONS AT HOME BEFORE – BY RESPONDENT TYPES

- Breakfast at home before COVID
  - Higher among females, married, SEC C, home makers, white collared workers
  - Lower among males, older age, single, SEC B and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	23	19	26	23	21	27	20	17	35	30	29	9	18
6 times a week	13	10	15	15	9	9	15	11	16	15	11	9	18
5 times a week	13	10	17	10	19	6	18	18	4	15	11	15	15
4 times a week	20	20	20	21	19	16	23	23	15	20	21	21	18
3 times a week	12	16	7	11	12	14	10	16	4	10	16	12	6
2 times a week	10	11	10	11	9	17	6	8	15	5	9	9	21
1 time a week	2	3	2	2	4	2	3	3	2	3	0	6	3
Once a fortnight	3	6	0	3	4	5	2	4	2	0	4	9	0
Once in 3 weeks	2	4	1	2	4	2	3	1	5	3	0	9	0
Once a month	0	0	0	0	0	0	0	0	0	0	0	0	0
Less often / Never	1	1	1	2	0	3	0	0	4	0	0	3	3
<b>Avg. times / Month</b>	<b>17.70</b>	<b>15.97</b>	<b>19.35</b>	<b>17.88</b>	<b>17.38</b>	<b>16.68</b>	<b>18.36</b>	<b>17.33</b>	<b>18.44</b>	<b>19.93</b>	<b>18.86</b>	<b>13.47</b>	<b>17.41</b>

# BREAKFAST OCCASSIONS AT HOME AFTER – BY RESPONDENT TYPES

- Nearly half (46%) claim that their breakfast occasions at home will remain the same after COVID, 4 in 10 claim that there will be an increase in breakfast consumption at home
- Only a tenth claim that they will have breakfast less often at home after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	43	48	39	45	40	45	42	44	42	45	39	53	38
Remain the Same	46	43	50	48	44	45	47	46	47	43	55	35	47
Decrease	10	10	11	7	16	9	11	10	11	13	5	12	15

# BREAKFAST OCCASSIONS AT RESTAURANT DURING – BY RESPONDENT TYPES

- Nearly half (46%) have breakfast 1-3 times a week
- Breakfast at a restaurant during COVID
  - Higher among males, younger audience, singles, SEC C, white collared workers and others
  - Lower among females, older age, married, SEC B and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	7	11	2	8	4	11	4	3	15	3	9	6	9
6 times a week	5	3	7	7	2	2	7	4	7	10	0	0	12
5 times a week	4	8	1	5	4	3	5	6	2	0	4	6	9
4 times a week	9	11	6	8	9	11	7	11	4	8	9	12	6
3 times a week	13	18	10	12	16	19	10	15	11	3	14	15	24
2 times a week	19	18	20	17	23	13	23	23	11	23	29	12	6
1 time a week	14	15	13	15	12	17	12	12	18	10	11	21	18
Once a fortnight	7	5	8	5	11	6	7	6	9	8	7	6	6
Once in 3 weeks	3	1	5	4	2	0	5	5	0	3	0	9	3
Once a month	5	1	10	5	7	2	8	6	4	15	5	0	0
Less often / Never	14	10	18	15	12	17	12	11	20	20	13	15	9
<b>Avg. times / Month</b>	<b>9.18</b>	<b>11.28</b>	<b>7.18</b>	<b>9.80</b>	<b>8.02</b>	<b>9.89</b>	<b>8.73</b>	<b>8.82</b>	<b>9.89</b>	<b>7.13</b>	<b>9.27</b>	<b>8.47</b>	<b>12.16</b>

# BREAKFAST OCCASSIONS AT RESTAURANT BEFORE – BY RESPONDENT TYPES

- Consumers had breakfast more often at a restaurant before COVID
- Breakfast at a restaurant before COVID
  - Higher among males, older audience, singles, SEC B and white collared workers
  - Lower among females, younger age, SEC C and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	7	9	6	7	7	8	7	3	16	5	11	6	6
6 times a week	7	6	8	7	9	5	9	8	5	13	9	6	0
5 times a week	14	16	12	14	14	14	14	16	11	15	13	12	18
4 times a week	15	15	14	14	16	22	10	17	11	10	13	12	26
3 times a week	20	18	21	20	19	17	21	27	5	18	18	26	18
2 times a week	10	9	11	8	12	11	9	10	9	13	9	12	6
1 time a week	8	9	7	9	5	6	9	6	13	5	9	9	9
Once a fortnight	5	4	7	4	9	2	8	5	7	8	5	3	6
Once in 3 weeks	4	6	2	5	4	3	5	4	5	3	4	6	6
Once a month	4	1	6	4	4	2	5	3	5	8	5	0	0
Less often / Never	6	8	5	8	2	11	3	4	11	5	5	9	6
<b>Avg. times / Month</b>	<b>12.59</b>	<b>12.92</b>	<b>12.28</b>	<b>12.29</b>	<b>13.17</b>	<b>12.90</b>	<b>12.40</b>	<b>12.90</b>	<b>11.98</b>	<b>12.56</b>	<b>13.07</b>	<b>11.90</b>	<b>12.55</b>

# BREAKFAST OCCASSIONS AT RESTAURANT AFTER – BY RESPONDENT TYPES

- Nearly half (48%) claim that their breakfast occasions at a restaurant will remain the same after COVID, a third claim that there will be an increase in breakfast consumption at restaurants after COVID
- Nearly a fifth claim that they will have breakfast less often at a restaurant after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	34	36	32	32	39	38	32	33	36	38	29	29	44
Remain the Same	48	50	46	50	46	48	48	47	51	50	45	56	44
Decrease	18	14	21	19	16	14	20	20	13	13	27	15	12

# BREAKFAST OCCASSIONS FROM TAKEAWAY DURING

## – BY RESPONDENT TYPES

- Breakfast from a takeaway during COVID
  - No difference by gender and age
  - Higher among singles, SEC C and home makers
  - Lower among married, SEC B, govt. employees and others

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	7	8	6	7	7	8	6	2	16	8	7	6	6
6 times a week	2	3	1	1	4	2	2	2	2	3	4	0	0
5 times a week	9	6	12	10	7	11	8	11	5	13	7	12	6
4 times a week	10	14	6	11	7	14	7	11	7	5	13	9	12
3 times a week	14	9	19	10	21	6	19	14	15	23	14	6	12
2 times a week	22	24	20	24	18	23	21	28	11	18	14	29	32
1 time a week	11	13	10	11	11	11	11	12	9	5	16	12	9
Once a fortnight	4	1	6	4	4	2	5	4	4	5	2	0	9
Once in 3 weeks	5	9	2	5	7	8	4	3	11	0	9	9	3
Once a month	4	4	5	4	5	3	5	6	2	5	5	3	3
Less often / Never	12	11	13	13	11	13	12	9	18	18	9	15	9
<b>Avg. times / Month</b>	<b>9.77</b>	<b>9.78</b>	<b>9.77</b>	<b>9.71</b>	<b>9.90</b>	<b>10.23</b>	<b>9.48</b>	<b>9.41</b>	<b>10.49</b>	<b>10.45</b>	<b>9.99</b>	<b>9.09</b>	<b>9.30</b>

# BREAKFAST OCCASSIONS FROM TAKEAWAY BEFORE

## – BY RESPONDENT TYPES

- Breakfast from a takeaway before COVID
  - No difference by gender, age and SEC
  - Higher among singles and home makers
  - Lower among married and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	6	8	5	7	5	8	5	2	15	8	7	3	6
6 times a week	6	6	6	7	5	8	5	7	4	10	2	9	6
5 times a week	10	8	12	8	12	8	11	12	5	13	13	3	9
4 times a week	14	13	15	13	16	14	14	14	15	15	11	15	18
3 times a week	25	28	23	27	21	28	23	29	16	20	25	32	24
2 times a week	10	14	7	8	14	8	12	14	4	5	16	9	9
1 time a week	10	10	10	9	11	9	10	6	18	8	9	15	9
Once a fortnight	4	0	7	3	5	0	6	3	5	5	4	0	6
Once in 3 weeks	7	8	6	7	7	6	7	6	7	5	5	9	9
Once a month	3	4	2	4	2	5	2	3	4	3	5	3	0
Less often / Never	5	4	7	7	2	6	5	5	7	10	4	3	6
<b>Avg. times / Month</b>	<b>11.78</b>	<b>12.04</b>	<b>11.53</b>	<b>11.66</b>	<b>12.01</b>	<b>12.38</b>	<b>11.39</b>	<b>11.87</b>	<b>11.59</b>	<b>12.69</b>	<b>11.48</b>	<b>11.21</b>	<b>11.76</b>



# BREAKFAST OCCASSIONS FROM TAKEAWAY AFTER – BY RESPONDENT TYPES

- Half claim that their breakfast occasions from takeaways will remain the same after COVID, over a fourth claim that there will be an increase
- Another fourth claim that they will have breakfast less often from a takeaway after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	27	33	21	25	30	23	29	23	35	30	23	35	21
Remain the Same	49	48	51	48	53	52	48	52	44	43	52	47	56
Decrease	24	20	27	27	18	25	23	25	22	28	25	18	24

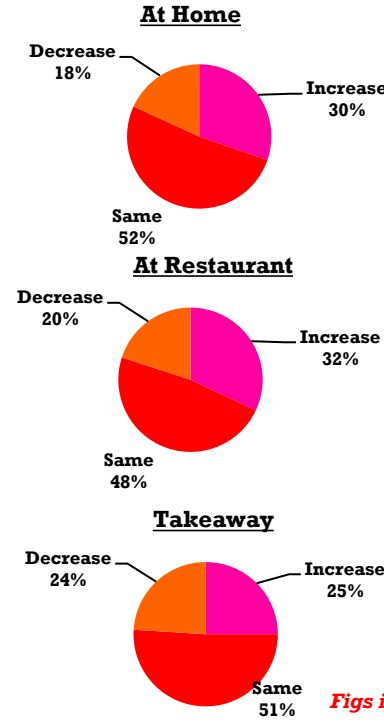
# SNAPSHOT OF LUNCH OCCASSIONS

- Substantial increase in lunch consumption at home during COVID times (67%) compared to earlier (55%), lunch from restaurants and takeaways lower
- Post COVID, less than a third of the consumers believe that their lunch consumption at home will increase compared to what it was before COVID; for restaurants and takeaways half believe that their consumption will remain the same as what was before COVID

## Habits During and Before COVID



## Perceptions after COVID



# LUNCH OCCASSIONS AT HOME DURING – BY RESPONDENT TYPES

- Lunch at home during COVID
  - Higher among females, younger audience, married, SEC B, home makers and others
  - Lower among males, older age group, single, SEC C and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	32	25	38	35	26	31	32	28	38	45	27	12	44
6 times a week	20	21	19	20	21	16	23	24	13	20	25	21	12
5 times a week	15	14	15	13	18	16	14	18	7	13	14	21	12
4 times a week	5	8	2	6	4	9	2	5	5	3	5	9	3
3 times a week	5	6	5	6	5	6	5	7	2	5	5	9	3
2 times a week	12	13	12	10	16	9	14	10	16	10	14	6	18
1 time a week	6	5	7	6	7	6	6	3	13	5	5	9	6
Once a fortnight	1	3	0	1	2	0	2	2	0	0	0	6	0
Once in 3 weeks	1	1	0	0	2	0	1	0	2	0	0	3	0
Once a month	2	3	1	3	0	5	0	1	4	0	4	3	0
Less often / Never	1	3	0	2	0	2	1	2	0	0	0	3	3
<b>Avg. times / Month</b>	<b>19.34</b>	<b>18.09</b>	<b>20.54</b>	<b>19.67</b>	<b>18.73</b>	<b>18.92</b>	<b>19.61</b>	<b>19.94</b>	<b>18.17</b>	<b>21.90</b>	<b>19.25</b>	<b>15.83</b>	<b>20.00</b>

# LUNCH OCCASSIONS AT HOME BEFORE – BY RESPONDENT TYPES

- Lunch at home before COVID
  - Higher among females, younger audience, SEC C, home makers and others
  - Lower among males, older age group, single, SEC C and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	23	15	30	27	14	25	21	16	36	38	21	12	18
6 times a week	12	11	13	12	12	13	12	11	15	15	13	9	12
5 times a week	20	21	18	15	28	16	22	24	11	18	14	15	35
4 times a week	11	13	10	14	5	13	10	15	4	10	14	6	12
3 times a week	11	15	7	10	12	13	10	14	5	5	11	18	12
2 times a week	10	8	13	10	11	9	11	9	13	3	18	9	9
1 time a week	5	6	5	5	7	5	6	5	7	8	2	15	0
Once a fortnight	4	6	1	2	7	3	4	4	4	3	2	12	0
Once in 3 weeks	1	1	0	1	0	0	1	1	0	0	0	3	0
Once a month	2	3	2	2	4	3	2	2	4	3	4	3	0
Less often / Never	1	1	1	2	0	2	1	1	2	0	2	0	3
<b>Avg. times / Month</b>	<b>17.37</b>	<b>15.97</b>	<b>18.71</b>	<b>18.05</b>	<b>16.11</b>	<b>17.66</b>	<b>17.19</b>	<b>16.80</b>	<b>18.51</b>	<b>20.38</b>	<b>17.00</b>	<b>13.01</b>	<b>18.82</b>

# LUNCH OCCASSIONS AT HOME **AFTER** – BY RESPONDENT TYPES

- **Post COVID, over half claim that their lunch occasions at home will remain the same as before COVID, 3 out of 10 claim that there will be an increase**
- **Less than a fifth claim that they will have lunch less often at home after COVID**

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	30	29	32	32	28	34	28	28	36	30	29	41	24
Remain the Same	51	53	50	50	53	47	54	52	49	50	57	41	53
Decrease	18	19	18	18	19	19	18	20	15	20	14	18	24

# LUNCH OCCASSIONS AT RESTAURANT DURING – BY RESPONDENT TYPES

- Lunch at restaurant during COVID
  - Higher among males, younger age group, single, SEC C, white collared workers and govt. employees
  - Lower among females, older age group, single, SEC B, home makers and others

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	11	11	11	12	9	16	8	6	22	10	11	15	9
6 times a week	3	3	4	3	4	2	4	4	2	0	7	3	0
5 times a week	4	5	4	5	4	6	3	5	4	0	7	6	3
4 times a week	9	10	8	10	7	9	9	10	7	8	11	9	9
3 times a week	7	10	5	7	9	6	8	10	2	8	9	9	3
2 times a week	24	25	23	22	26	19	27	28	15	20	16	29	35
1 time a week	11	16	6	9	14	14	9	11	11	8	13	12	12
Once a fortnight	7	5	10	7	7	8	7	8	5	5	7	9	9
Once in 3 weeks	3	3	4	4	2	3	3	2	5	3	2	3	6
Once a month	10	5	14	8	12	5	13	8	13	20	11	0	6
Less often / Never	10	8	13	12	7	13	9	8	15	20	7	6	9
<b>Avg. times / Month</b>	<b>9.63</b>	<b>10.38</b>	<b>8.90</b>	<b>9.89</b>	<b>9.13</b>	<b>10.56</b>	<b>9.03</b>	<b>9.15</b>	<b>10.56</b>	<b>7.13</b>	<b>10.99</b>	<b>11.51</b>	<b>8.43</b>

# LUNCH OCCASSIONS AT RESTAURANT BEFORE – BY RESPONDENT TYPES

- Lunch at restaurant before COVID
  - Higher among males, singles, SEC B and govt. employees
  - Lower among females, married, SEC C and others

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	8	11	5	9	5	11	6	4	16	8	9	9	6
6 times a week	8	6	10	6	12	6	9	10	4	13	5	9	6
5 times a week	13	9	18	13	14	11	15	14	13	10	21	12	6
4 times a week	13	19	8	17	7	22	8	17	5	13	11	24	9
3 times a week	10	11	8	9	11	6	12	12	5	8	2	12	24
2 times a week	13	13	13	7	23	9	15	17	5	10	20	6	12
1 time a week	10	10	10	10	9	9	10	9	11	10	7	9	15
Once a fortnight	5	5	6	7	4	6	5	4	9	5	4	6	9
Once in 3 weeks	5	4	6	4	7	0	8	5	5	5	4	6	6
Once a month	5	3	8	6	5	5	6	4	9	10	7	3	0
Less often / Never	9	10	8	12	4	14	6	6	16	10	11	6	9
<b>Avg. times / Month</b>	<b>11.77</b>	<b>12.32</b>	<b>11.23</b>	<b>11.64</b>	<b>12.01</b>	<b>12.30</b>	<b>11.43</b>	<b>12.28</b>	<b>10.75</b>	<b>11.47</b>	<b>12.05</b>	<b>13.17</b>	<b>10.25</b>

# LUNCH OCCASSIONS AT RESTAURANT **AFTER** – BY RESPONDENT TYPES

- A little less than half claim that their lunch occasions at restaurants will remain the same as before COVID, 3 out of 10 claim that there will be an increase
- A fifth claim that they will have lunch less often at a restaurant after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	32	39	26	29	39	30	34	38	22	40	21	50	24
Remain the Same	48	46	49	50	42	58	41	44	55	35	52	41	62
Decrease	20	15	25	21	19	13	25	18	24	25	27	9	15



# LUNCH OCCASSIONS FROM TAKEAWAY DURING – BY RESPONDENT TYPES

- Lunch from takeaways during COVID
  - Higher among males, younger audience, singles, SEC C, white collared workers and govt. employees
  - Lower among females, older age group, married, SEC B, home makers and others

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	5	8	4	6	5	8	4	2	13	5	5	6	6
6 times a week	3	1	5	3	4	2	4	3	4	3	7	0	0
5 times a week	8	9	7	10	4	13	5	7	9	8	7	9	9
4 times a week	10	13	7	14	2	16	6	11	7	3	13	21	3
3 times a week	13	14	12	12	14	9	15	17	5	10	13	9	21
2 times a week	18	18	19	16	23	13	22	18	18	20	18	15	21
1 time a week	15	16	14	11	23	13	17	19	7	18	11	21	15
Once a fortnight	4	3	6	3	7	3	5	5	4	8	0	3	9
Once in 3 weeks	5	6	4	5	5	5	5	4	7	3	7	9	0
Once a month	5	3	7	4	7	3	6	5	5	5	9	0	3
Less often / Never	13	11	15	17	7	17	11	10	20	20	11	9	15
<b>Avg. times / Month</b>	<b>9.22</b>	<b>10.01</b>	<b>8.48</b>	<b>9.88</b>	<b>8.00</b>	<b>10.34</b>	<b>8.51</b>	<b>8.81</b>	<b>10.04</b>	<b>7.63</b>	<b>10.18</b>	<b>9.94</b>	<b>8.79</b>

# LUNCH OCCASSIONS FROM TAKEAWAY BEFORE – BY RESPONDENT TYPES

- Lunch from takeaways before COVID
  - Higher among males, older audience, SEC B and home makers
  - Lower among females, younger audience, SEC C and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	7	8	6	7	7	8	6	3	15	8	9	6	3
6 times a week	5	3	7	6	4	2	7	6	4	10	4	3	3
5 times a week	11	11	11	12	9	14	9	14	5	13	9	12	12
4 times a week	10	11	10	8	14	13	9	11	9	13	11	9	9
3 times a week	26	30	21	23	30	22	28	29	18	18	27	21	38
2 times a week	10	9	11	7	14	5	13	13	4	8	11	9	12
1 time a week	10	13	7	12	5	13	8	6	16	8	5	24	6
Once a fortnight	6	4	8	5	9	3	8	6	5	8	4	6	9
Once in 3 weeks	4	4	4	5	2	6	2	3	5	0	7	6	0
Once a month	4	3	6	5	4	3	5	5	4	5	7	0	3
Less often / Never	8	6	10	10	4	13	5	5	15	13	7	6	6
<b>Avg. times / Month</b>	<b>11.36</b>	<b>11.70</b>	<b>11.04</b>	<b>11.04</b>	<b>11.95</b>	<b>11.05</b>	<b>11.56</b>	<b>11.62</b>	<b>10.84</b>	<b>12.20</b>	<b>11.38</b>	<b>10.43</b>	<b>11.26</b>

# LUNCH OCCASSIONS FROM TAKEAWAY AFTER – BY RESPONDENT TYPES

- Over half claim that their lunch occasions from takeaways will remain the same as before COVID, a fourth claim that there will be an increase
- Another fourth claim that they will have lunch less often from a takeaway after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	25	29	21	21	32	27	24	28	20	23	29	24	24
Remain the Same	51	51	51	52	49	53	50	50	55	48	48	50	62
Decrease	24	20	27	26	19	20	26	23	25	30	23	26	15

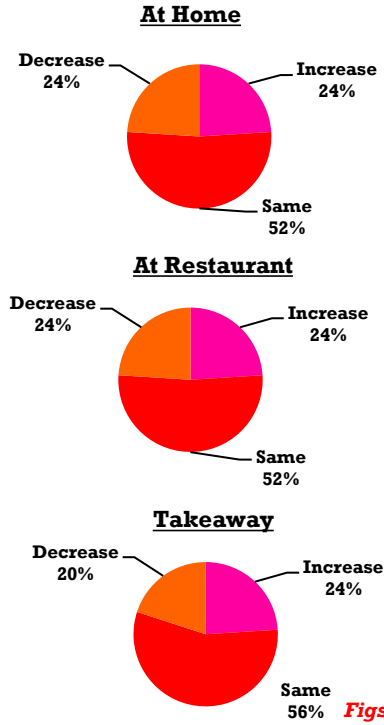
# SNAPSHOT OF DINNER OCCASSIONS

- Substantial increase in dinner consumption at home during COVID times compared to earlier, lunch from restaurants and takeaways correspondingly lower
- Post COVID, half of the consumers believe that their dinner consumption at home, at restaurants and from takeaways will be the same as it was before COVID; for restaurants and takeaways a fourth believe that their consumption will increase compared to what it was before COVID

Habits During and Before COVID



Perceptions after COVID



# DINNER OCCASSIONS AT HOME DURING – BY RESPONDENT TYPES

- Dinner occasions at home during COVID

- Higher among females, SEC C, home makers, white collared workers and others
- Lower among males, older audience, SEC B and govt. employees

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	45	34	55	45	44	41	47	43	47	58	45	24	50
6 times a week	13	18	8	14	11	14	12	12	15	8	14	15	15
5 times a week	12	11	12	11	12	16	9	12	11	5	13	12	18
4 times a week	8	6	10	8	7	5	10	7	9	13	9	6	3
3 times a week	4	6	1	3	5	5	3	5	2	3	4	9	0
2 times a week	6	8	5	7	5	6	6	7	4	8	7	6	3
1 time a week	7	10	4	5	11	6	7	7	5	3	4	15	9
Once a fortnight	2	3	1	2	2	2	2	2	2	0	0	9	0
Once in 3 weeks	2	3	1	2	2	2	2	2	2	3	2	3	0
Once a month	1	1	1	1	2	2	1	2	0	0	2	3	0
Less often / Never	2	1	2	3	0	3	1	1	4	3	2	0	3
<b>Avg. times / Month</b>	<b>20.39</b>	<b>18.75</b>	<b>21.96</b>	<b>20.63</b>	<b>19.94</b>	<b>20.01</b>	<b>20.64</b>	<b>20.01</b>	<b>21.15</b>	<b>21.93</b>	<b>21.04</b>	<b>15.77</b>	<b>22.12</b>

# DINNER OCCASSIONS AT HOME BEFORE – BY RESPONDENT TYPES

- **Dinner occasions at home before COVID**
  - **Higher among females, younger audience, singles, SEC C, white collared workers and others**
  - **Lower among males, older audience, married, SEC C, white collared workers and govt. employees**

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	24	21	26	31	11	28	21	16	40	30	27	9	26
6 times a week	13	11	14	14	11	13	13	13	13	5	18	12	15
5 times a week	21	21	21	19	26	25	19	24	16	18	21	12	35
4 times a week	15	15	14	13	18	14	15	17	9	18	11	21	12
3 times a week	7	9	6	8	5	6	8	9	4	5	9	12	3
2 times a week	9	10	7	6	14	6	10	10	5	8	9	15	3
1 time a week	4	4	5	3	7	3	5	3	7	10	2	6	0
Once a fortnight	2	3	2	3	2	2	3	3	2	3	0	6	3
Once in 3 weeks	2	1	2	1	4	0	3	2	2	5	0	3	0
Once a month	1	0	1	0	2	0	1	1	0	0	2	0	0
Less often / Never	2	5	0	3	2	3	2	3	2	0	2	6	3
<b>Avg. times / Month</b>	<b>18.15</b>	<b>17.37</b>	<b>18.90</b>	<b>19.47</b>	<b>15.68</b>	<b>19.53</b>	<b>17.27</b>	<b>17.12</b>	<b>20.21</b>	<b>17.62</b>	<b>19.66</b>	<b>13.92</b>	<b>20.53</b>

# DINNER OCCASSIONS AT HOME **AFTER** – BY RESPONDENT TYPES

- Over half claim that their dinner occasions at home will remain the same as before COVID, a fourth claim that there will be an increase
- Another fourth claim that they will have dinner less often at home after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	24	20	29	21	30	14	31	23	27	33	21	24	21
Remain the Same	52	58	46	55	46	56	49	50	56	40	61	53	50
Decrease	24	23	25	23	25	30	20	28	16	28	18	24	29

# DINNER OCCASSIONS AT RESTAURANT DURING – BY RESPONDENT TYPES

- Dinner occasions at restaurant during COVID
  - Higher among males, older audience, married and home makers
  - Lower among females, single and white collared workers

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	10	11	8	10	9	11	9	8	13	13	9	9	9
6 times a week	4	3	5	3	5	0	6	4	4	8	2	0	6
5 times a week	4	4	4	5	2	2	5	5	2	0	5	3	6
4 times a week	7	8	6	6	9	8	6	7	5	8	7	9	3
3 times a week	7	8	7	7	7	11	5	7	7	3	7	15	6
2 times a week	20	24	15	18	23	13	24	23	13	25	20	21	12
1 time a week	15	15	15	16	14	14	16	15	16	5	14	21	24
Once a fortnight	10	5	14	8	12	13	8	9	11	13	9	6	12
Once in 3 weeks	5	8	2	3	9	8	3	6	2	0	4	6	12
Once a month	4	4	5	4	5	2	6	6	2	8	4	3	3
Less often / Never	15	13	18	21	5	20	12	10	25	20	20	9	9
<b>Avg. times / Month</b>	<b>8.77</b>	<b>9.34</b>	<b>8.22</b>	<b>8.58</b>	<b>9.12</b>	<b>7.87</b>	<b>9.34</b>	<b>8.91</b>	<b>8.48</b>	<b>9.33</b>	<b>8.40</b>	<b>8.93</b>	<b>8.54</b>



# DINNER OCCASSIONS AT RESTAURANT BEFORE – BY RESPONDENT TYPES

- **Dinner occasions at restaurant before COVID**
  - **Higher among females, older audience, married, SEC B and home makers**
  - **Lower among males, younger audience, singles, SEC C, govt. employees and white collared workers**

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	8	10	6	9	5	11	6	6	13	10	9	6	6
6 times a week	4	0	7	1	9	0	6	5	2	8	5	0	0
5 times a week	6	6	6	6	7	5	7	7	4	8	4	9	6
4 times a week	10	5	14	7	16	6	12	11	7	20	4	12	6
3 times a week	20	24	17	19	23	19	21	25	11	20	25	21	12
2 times a week	12	13	12	12	12	14	11	14	9	3	14	6	26
1 time a week	16	19	13	18	12	17	15	14	20	10	13	24	21
Once a fortnight	5	9	2	5	7	2	8	6	4	3	2	12	9
Once in 3 weeks	2	1	2	2	2	5	0	2	2	0	4	0	3
Once a month	5	6	5	6	5	6	5	2	13	5	9	3	3
Less often / Never	12	8	15	17	2	16	9	9	16	15	13	9	9
<b>Avg. times / Month</b>	<b>10.09</b>	<b>9.70</b>	<b>10.46</b>	<b>9.11</b>	<b>11.94</b>	<b>9.22</b>	<b>10.65</b>	<b>10.67</b>	<b>8.95</b>	<b>12.40</b>	<b>9.89</b>	<b>9.44</b>	<b>8.36</b>

# DINNER OCCASSIONS AT RESTAURANT **AFTER** – BY RESPONDENT TYPES

- Over half claim that their dinner occasions at restaurants will remain the same as before COVID, a fourth claim that there will be an increase
- Another fourth claim that they will have dinner less often at restaurants after COVID

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	24	21	27	18	37	20	27	26	22	28	36	18	9
Remain the Same	52	53	51	59	39	61	46	48	60	48	46	50	68
Decrease	24	26	21	23	25	19	27	27	18	25	18	32	24

# DINNER OCCASSIONS FROM TAKEAWAY DURING – BY RESPONDENT TYPES

- **Dinner occasions from takeaways during COVID**
  - **Higher among males, older audience, SEC C, govt. employees and others**
  - **Lower among females, younger audience, govt. employees and others**

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	8	10	6	8	7	11	6	5	15	8	11	6	6
6 times a week	1	1	1	1	2	0	2	2	0	0	4	0	0
5 times a week	9	13	5	8	9	9	8	9	7	8	13	9	3
4 times a week	10	6	13	8	12	9	10	10	9	18	5	9	9
3 times a week	14	11	17	11	19	11	16	15	13	15	14	6	21
2 times a week	19	18	20	18	21	11	24	24	9	23	13	32	12
1 time a week	15	20	10	14	16	14	15	15	15	3	13	21	26
Once a fortnight	4	5	2	5	2	5	3	4	4	3	4	3	6
Once in 3 weeks	5	4	6	4	7	8	3	6	4	8	2	0	12
Once a month	5	6	4	6	4	6	4	3	9	3	9	6	0
Less often / Never	12	6	17	17	2	16	9	9	16	15	14	9	6
<b>Avg. times / Month</b>	<b>9.75</b>	<b>10.36</b>	<b>9.16</b>	<b>9.13</b>	<b>10.90</b>	<b>9.45</b>	<b>9.94</b>	<b>9.61</b>	<b>10.03</b>	<b>10.27</b>	<b>10.61</b>	<b>9.06</b>	<b>8.39</b>

# DINNER OCCASSIONS FROM TAKEAWAY BEFORE – BY RESPONDENT TYPES

- **Dinner occasions from takeaways before COVID**
  - **Higher among older audience, married, SEC B and home makers**
  - **Lower among the younger audience, singles, SEC C and govt. employees**

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Almost everyday	7	9	6	8	5	9	6	4	15	8	7	6	9
6 times a week	4	3	5	3	5	0	6	6	0	5	7	0	0
5 times a week	10	9	12	9	12	6	13	12	7	15	11	9	6
4 times a week	11	10	12	7	18	11	11	11	11	10	13	9	12
3 times a week	18	20	15	19	16	17	18	21	11	15	9	24	29
2 times a week	15	18	12	15	14	13	16	18	7	10	14	18	18
1 time a week	13	14	13	12	16	13	14	13	15	18	13	12	12
Once a fortnight	4	5	2	4	4	6	2	2	7	0	5	9	0
Once in 3 weeks	2	3	2	2	4	5	1	4	0	0	2	3	6
Once a month	5	4	7	7	4	6	5	2	13	8	9	3	0
Less often / Never	10	8	13	14	4	14	8	8	15	13	11	9	9
<b>Avg. times / Month</b>	<b>10.75</b>	<b>10.92</b>	<b>10.58</b>	<b>10.18</b>	<b>11.80</b>	<b>9.44</b>	<b>11.58</b>	<b>11.11</b>	<b>10.02</b>	<b>11.28</b>	<b>10.79</b>	<b>9.77</b>	<b>11.02</b>

# DINNER OCCASSIONS FROM TAKEAWAY AFTER – BY RESPONDENT TYPES

- Over half claim that their dinner occasions from takeaways will remain the same as before COVID, a fourth claim that there will be an increase
- A fifth claim that they will have dinner less often from takeaways after COVID

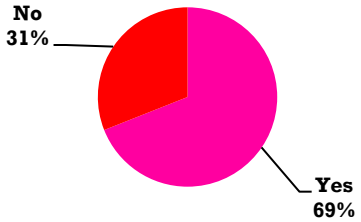
*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	164	80	84	107	57	64	100	109	55	40	56	34	34
Increase	24	24	25	21	32	23	25	23	27	28	25	29	15
Remain the Same	55	60	51	57	53	63	51	57	53	48	55	56	65
Decrease	20	16	24	22	16	14	24	20	20	25	20	15	21

# INCREASE IN PURCHASE OF COOKING SEASONINGS DURING COVID COMPARED TO EARLIER

- 7 out of 10 consumers claimed an increase in purchase of cooking seasonings during COVID times compared to earlier – led largely by females / home makers

*Figs in %*



	Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base	80	84	107	57	64	100	109	55	40	56	34	34
Yes	58	80	71	65	66	71	69	69	88	73	68	41
No	43	20	29	35	34	29	31	31	13	27	32	59

# COOKING SEASONINGS PURCHASED – AMONG THOSE WHO PURCHASED

- Among those who purchased cooking seasonings, sugar, fish sauce, MSG, salt, oil and powder seasoning the key ingredients purchased
- Purchase of salt higher and garlic lower among the older audience compared to overall
- There is no significant difference in findings across other consumers compared to overall

*Figs in %*

		Gender		Age (yrs)		Marital Status		SEC		Occupation			
	Total	Male	Female	25-35	36-45	Single	Married	SEC B	SEC C	Home Maker	White Collar	Govt. Empl.	Other
Base N	113	46	67	76	37	42	71	75	38	35	41	23*	14*
Sugar	70	70	70	71	68	67	72	69	71	69	66	74	79
Fish sauce	84	85	84	87	78	83	85	84	84	86	78	87	93
MSG	43	39	46	46	38	50	39	35	61	49	54	35	14
Salt	71	72	70	62	89	62	76	77	58	74	63	87	57
Oil	27	24	28	18	43	17	32	29	21	31	22	43	0
Powder Seasoning	42	39	45	36	57	43	42	43	42	43	51	26	43
Soy sauce	17	13	19	17	16	12	20	16	18	20	15	22	7
Oyster sauce	13	7	18	13	14	7	17	13	13	17	7	22	7
Garlic	11	7	13	16	0	10	11	7	18	20	7	4	7
Pepper	17	13	19	14	22	17	17	17	16	14	17	13	29
Cube Seasoning	27	28	27	30	22	33	24	31	21	31	34	17	14

\* Low Base



## Summary of Findings



# SUMMARY OF FINDINGS ...1

- Overall, food consumption at home has increased substantially during COVID times compared to the times when there was no COVID, consumption at restaurants and from takeaways has decreased
- This is true across breakfast, lunch and dinner occasions
- The trend seems to be largely led by women (females, home makers) and the older audience more than others
- The following table provides a summary of food habits during and before COVID – at home, at restaurants and from takeaways. This is a comparative depiction of increase (+), decrease (-) and no difference (=) compared to overall (Total)

Audience	Breakfast						Lunch						Dinner					
	At Home		At Restaurant		From Takeaways		At Home		At Restaurant		From Takeaways		At Home		At Restaurant		From Takeaways	
	During	Before	During	Before	During	Before	During	Before	During	Before	During	Before	During	Before	During	Before	During	Before
Male	-	-	+	+	=	=	-	-	+	+	+	+	-	-	+	-	+	=
Female	+	+	-	-	=	=	+	+	-	-	-	-	+	+	-	+	-	=
25-35	=	=	+	-	=	=	+	+	+	=	+	-	=	+	=	-	-	-
36-45	=	-	-	+	=	=	-	-	-	=	-	+	-	-	+	+	+	+
Single	-	-	-	-	-	-	-	=	+	+	+	-	-	+	-	-	-	-
Married	+	+	-	=	-	-	+	=	-	-	-	=	=	-	+	+	=	+
SEC B	+	-	-	+	-	=	+	-	-	+	-	+	-	-	=	+	=	+
SEC C	-	+	+	-	-	=	-	+	+	-	+	-	+	+	=	-	+	-
Home Maker	+	+	-	=	+	+	+	+	-	=	-	+	+	-	+	+	+	+
White Coll	=	+	+	+	=	=	=	-	+	=	+	=	+	+	-	=	+	=
Govt.	-	-	-	-	-	-	-	-	+	+	+	-	-	-	=	-	-	-
Other	+	=	+	=	-	=	+	+	-	-	-	=	+	+	=	-	-	=

## SUMMARY OF FINDINGS ...2

- **Given this trend, the Client needs to ensure adequate availability of food seasonings at retail outlets going forward**
- **Across occasions of breakfast, lunch and dinner approx. 20-25% of consumers have indicated that their consumption of outside food (restaurants, takeaways) is likely to increase post COVID.**
  - **However, we believe that this could be because of the likely fatigue with home cooked food currently due to the on-going pandemic situation, rather than a long term trend of switch to outside food**
- **There is a substantial increase in purchase of food seasoning during COVID times**
- **If the trend of preferring home cooked food continues even after COVID, this trend of increasing demand for food seasonings too is likely to continue**
- **This reiterates the need for the Client to ensure that there are no 'out of stock' situations for their brands in the market place**

# CONTACT US



## EXPERIENCE

Over 15 years of experience in marketing and research in Cambodia.



## LOCAL KNOWLEDGE

Strong knowledge of local markets which can help our clients to design effective research as well as reporting for business needs.



## CONFIDENCE

We undertake work only when absolutely confident in our abilities.



## EXCELLENT SERVICE

We are supportive, reliable and quick in responses with friendly manner throughout.



## COMPETITIVE PRICING

Our pricing strategy is highly competitive in the market, without compromising on the quality and the timeline of project delivery.



## FRIENDLY APPROACH

If our client is not also our friend after the shared work, we do not recognize the work as completely successful.

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