THE NEW CODES OF SOCIALIZING & CELEBRATIONS

Lessons from Raya in the backdrop of Covid-19 Captured via Digital Immersions

An Ipsos Malaysia Thought-Piece

July 2020



IPSOS WEBINAR

In Covid-19 times – New Codes of Socializing and Celebrations – Lessons from Raya 2020

Team-Profile



Anshuman Ray Group Service Line Lead Ipsos UU & SIA



Asrul Sani Consultant Ipsos UU



Dex Yeoh Research Manager SIA



Hykarl Sufardi Research Executive Ipsos UU

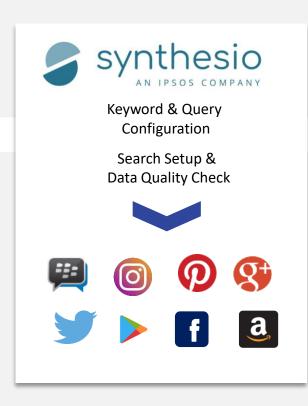


Jane Ramasamy
Community
Administrator





A SIA study capturing social sentiments during Ramadhan and Hari Raya festive in Malaysia in the backdrop of MCO







NOISE DETECTION & QUERY REFINEMENT

Removal of spams, brand & promotional posts and other irrelevant mentions





Extract 2,000 sample size for secondary data processing (Sentiment re-segregation & Sub-topic analysis)



REPORTING

Quantification Measurements (charting and summary) & Qualitative Analysis (find out the unknown's unknown and why)

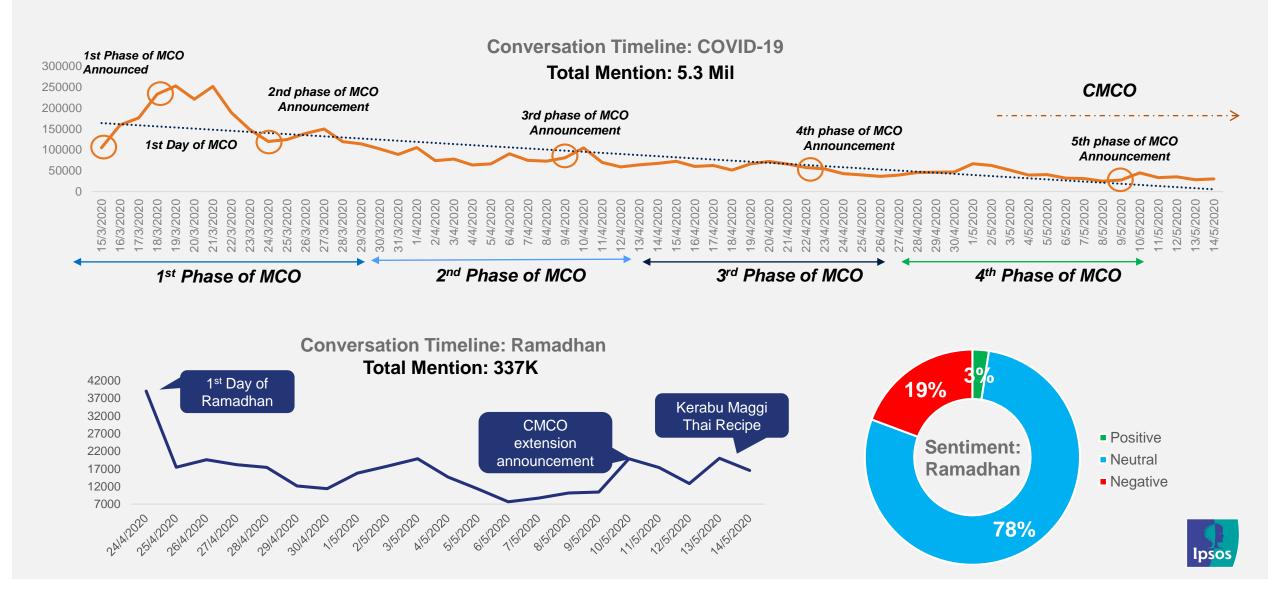
Time Period: 24th April 2020– 14th May 2020





FAITH REMAINS AT THE HEARTLAND OF RAMADHAN

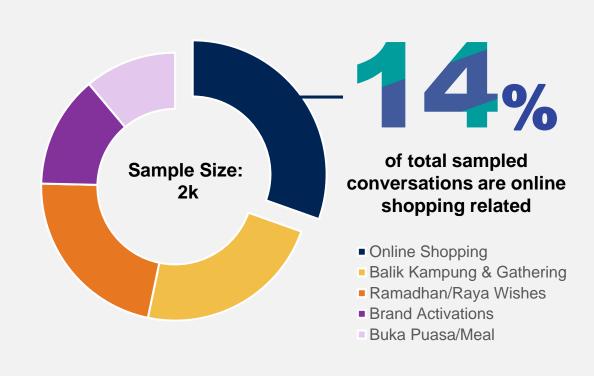
Even during uncertain times, netizens driving positive conversations



ONLINE SHOPPING ACTIVITIES SOAR DURING THIS PERIOD AS A RESULT OF THE NOVEL COVID-19 OUTBREAK

Conversations are highly concentrated on Twitter and Instagram.

Conversation Topics (Top 5)

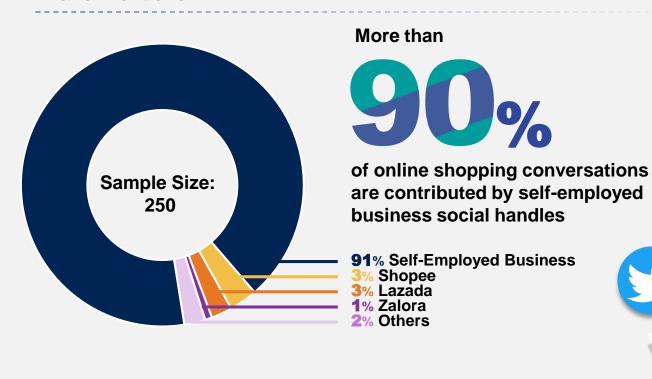




ONLINE CITIZENS ARE OFFERED WITH ABUNDANCE OF CHOICES

Drastic increase Self-Employed Business as many sellers have moved online due to MCO

Brand Mentions



'Launched! Korang nak grab?
Jom wasap Cikna laju-lajuuuu

B Habis batch ni, restock lepas
raya tau. Kalau plan nak pakai
raya, wajib grab sekarang
Tudung Labuh Premium'

'Terbaru dari Yarra Scarf, iaitu Bawal Express. Sempena Hari Raya tahun ni sebanyak 20 design Kak Yun a.k.a Lady Ingat gaiss, koleksi kali ni limited once dah sold out takkan restock lagi (1) (2).

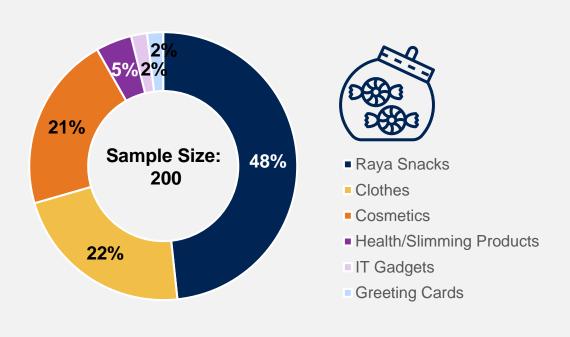
Haa, berkenan terus booking (with payment) pada Cik Kin



FOOD AND FASHION ITEMS ARE THE MOST MENTIONED COMMODITY

Snacking is a big opportunity area... Lockdown creates new meal occasions and binging moments

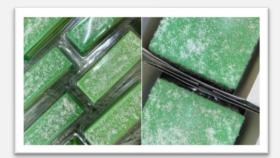
Commodity Types











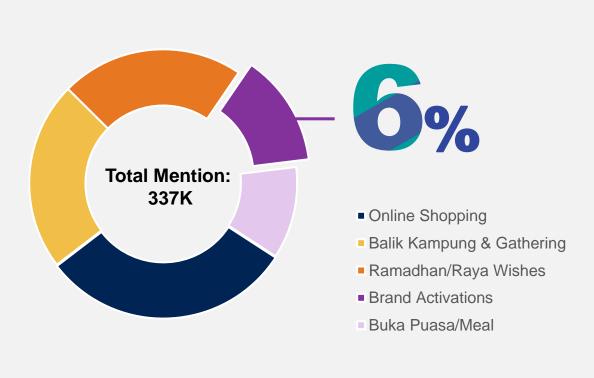




BRANDS TOOK A DIFFERENT STANCE FOR THIS YEAR'S RAYA CAMPAIGNS

Majority of brands focus heavily on 'Stay at Home' concept

Conversation Topics (Top 5)



celebrate Raya at home sahur resipi **IftarTogether** tutorials Jom cuba buat **#StayHome** dudukrumah aktif e-kitchen Facebook live masak **Buat sendiri** Makeup tutorials Resipi senang

Sample Size: 1,819

ONLINE CONTESTS, ONLINE RECIPES AND TUTORIALS GARNER HIGHER SOCIAL TRACTIONS, CREATING NEW OPPORTUNITIES FOR BRANDS



Top 10 Brands (Facebook)		Total Post	Total Engagement	Impressions	
(01)	SAMSUNG	8	500	1b	
02	Lazada	18	3k	533m	
03	Shopee	42	29k	714m	
04	watsons	57	37k	640m	
05	MAYBELLINNE	7	53	244m	
06	HUAWEI	4	3k	233m	
07	NESCAFÉ.	5	366	186m	
08	L'ORÉAL PARIS	3	180	106m	
09	Grað	10	747	67m	
10	Fird	3	57	47m	















WHILE BRAND ACTIVATIONS ARE SEEN TO BE SUCCESS ON FACEBOOK,

KOLs play a more influential role with Insta-Live skyrocketing

Top 5 KOLs (Instagram)		Total Post	Total Engagement	Impressions	
01	Rozita Che Wan	44	780k	4.8m	
02	Laudya Cynthia Bella	4	584k	31m	Fashion
03	Mrs Nedim	18	203 k	6.9m	Beauty
04	Ohabangkosmetik	14	10k	55m	
05	Mira Filzah	8	274k	6.4m	CPG



WE SEE A SIGNIFICANT CHANGE OF DINING BEHAVIOUR WITH NETIZENS OPTING FOR MEALS VIA FOOD DELIVERY INSTEAD OF IFTAAR BUFFETS

Home-cook vs Food Delivery



'Today berbuka with my fav Nasi
'Today berbuka with my fav Nasi
Ayam Geprek (**) (**) Now KOTAK
Ayam Geprek (**) (**) Now KOTAK
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'Bazaar ramadhan online area Batu Pahat, Johor. Boleh tengok kat bawah ni ws dan beli !!!'



'Area Subang kalau ada Y9 buat ketupat ni tolong pm saya. Saya nk order utk raya'



COOKING BECOMES A NEW LIFE-SKILL EVERYONE WANTS TO OWN

Kuih Raya

momscooking

sahur

foodporn

Malay food

e-Ramadhan delivery

masak

bazaar online

order #dudukrumah

#stayathome

resepi

#zerocovid19 #staysafe

buka puasa

sedap giler

iftar





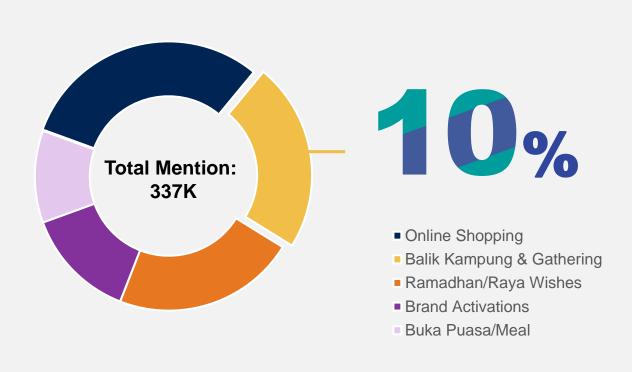






HOWEVER, WE SOME LOW SPIRITS CAPTURED AS INTERSTATE BALIK KAMPUNG WAS NOT ALLOWED IMPACTING FESTIVE SPIRIT

Conversation Topics (Top 5)







COMMUNITY DURATION AND RESPONDENT CRITERIA



METHODOLOGY

Online community on lpsos proprietary platform



DURATION

2 weeks, covering the week before Hari Raya, and the Hari Raya week



WHOM WE MET

- **■** 30 Malay consumers
- Good mix of Male & Female
- Across different lifestage
- Higher income & lower income

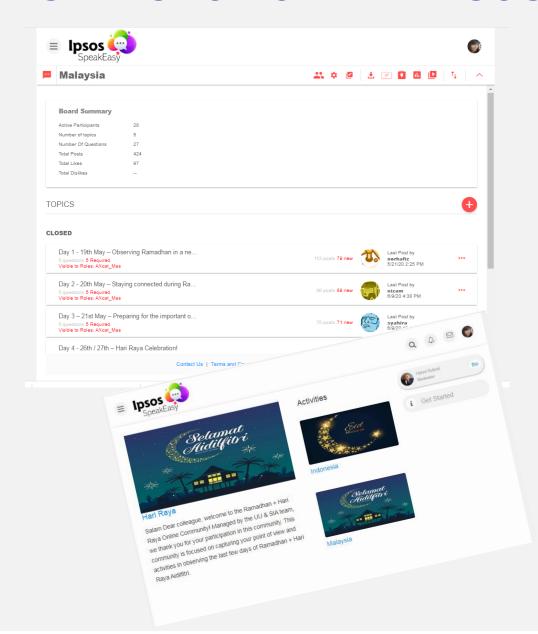


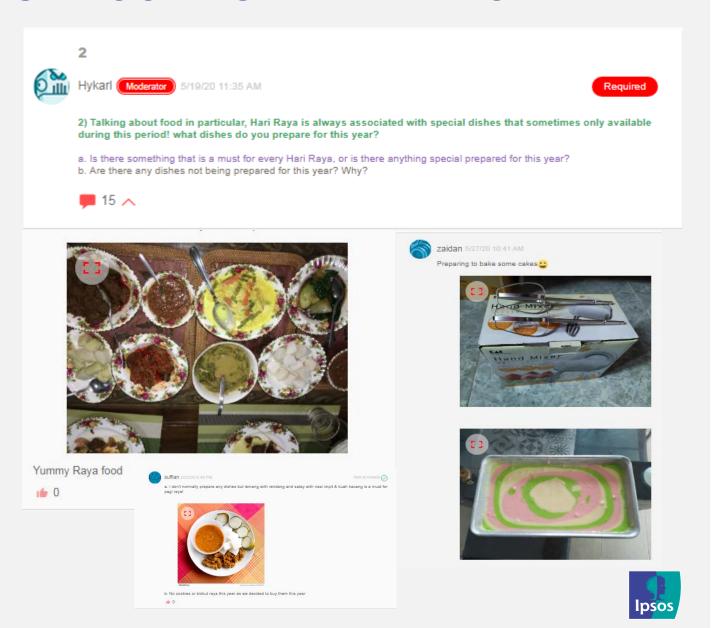
5 AREAS COVERED

- Ramadhan rituals in MCO
- Lifestyle & Socializing during Ramadhan in MCO
- Ramadhan Shopping in MCO
- Hari Raya celebration
- Media & entertainment in MCO



SNAPSHOT OF THE IPSOS SRP COMMUNITY PLATFORM





RAMADHAN & RAYA - CULTURAL AND ECONOMIC SIGNIFICANCE

One of the most significant events in the calendar for Malays



1.8 Billion Muslims
globally and approx. 19
Million Muslims in
Malaysia practice fasting
during Ramadhan and
celebrate Raya



There is a vibrant and significant 'Ramadhan Economy' created by consumption, gifting and charity



Fasting during the month of Ramadhan is one of the main five pillars of Islam



A time for togetherness and socialization. At the same time it's the time for generosity, compassion, self-reflection and spiritual significance, to develop a deeper connect with Allah



Spending for Ramadhan and Raya goes up to MYR 18 billion each year, with an average revenue of MYR 1000 per Malaysian for Raya and Ramadhan related consumption



SEVERAL SENTIMENTS EMERGED THROUGH THIS PERIOD

These stages are indicative based on sentiments and AI based analysis



DISBELIEF

#Coronavirusoutbreak - Confusion, disorientation and fear. Also a sense of denial



PREPARATION

#StayAtHome - Changing socializing and Iftaar plans, stockpiling supplies where possible, panic-buying, coming to grips with stockouts and short supply



ADJUSTMENT

#LockdownLife - Acceptance of the changes and restrictions during Ramadhan. Social distancing during festivity is a new concept.



ACCLIMATIZATION

#Thistooshallpass – The 'Pajama days' - Settled into routines and exploring new ways of connecting and socialising. Some sweet spots as people explore new activities and interests during an easy paced Ramadhan.



ENDURANCE

Tension builds up and fluctuates over time, with the restriction of movement/social activity affecting mood, relationships and the festive spirit. This can be aggravated by unsure timelines, loss of income and jobs



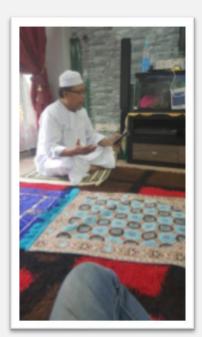
ANTICIPATION, ANXIETY

Relief as businesses start to reopen, signaling the end is in sight. New world order. New rules. But concerns about job and financial security due to economic uncertainty remain



THE VARIED RAYA MOODS THIS YEAR

The separation, yet the positivity & humour – The polarized sentiments





"We are very aware that we can't touch each other, keep washing our hands and just being so careful but I saw on social media that some were not so vigilant! am just worried on the next 5 days numbers of new cases!"

"But Raya is Raya. We will definitely have a celebration, only that we cannot balik kampung or go for iftar buffets"





Final thoughts –
"Hope this will all end
soon so we can go out to
'lepak at mamak' with
friends"

Being at home alone - sad
Being at home with family - Great!
Working from home - Cool
Working from home when people
expect you are available anytime
- LOL not cool!



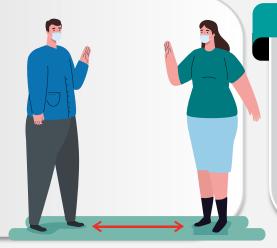


THE 4 BIG SHIFTS THAT WILL IMPACT THE WAY PEOPLE CELEBRATE FESTIVE MOMENTS

We have now delved into each of these shifts to uncover the emerging insights and the biggest areas of opportunity for brands to act upon

RAYA REVISITED

The rituals, practices and socializing drastically changed during Raya but festivity and faith are still at its heart



DIGITAL UBIQUITY

Physical connectivity is substituted by virtual connectivity.

Recreation & faith embracing technology



REVITALISING CREATIVITY & WELL-BEING

Pursuing new passions and interests to achieve a feeling of self-accomplishment and to fight boredom



CHANGING RAMADHAN ECONOMY

Due to social distancing, we witness changes in purchase behavior and also role reversals in the context of shopping







WHAT IT MEANS?



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Overview | Cultural Drivers | Implications

The rituals, practices and socializing drastically changed during Raya but festivity and faith are still at its heart

Concept of festivities changing through never-before experiences evoking stronger feeling of faith, introspection and simplicity

People are re-defining Ramadhan experiences and codes, which don't revolve around communal prayers, feasts and bazaars that are a hallmark of Ramadhan. But it brought the immediate family closer due to social isolation

8 big themes are identified under this shift







WHY IS THIS HAPPENING?



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Positive Sentiments of Being Close to Family

There is a growing spirit of 'Family-First'.

Staying at home creates more 'We Time' - Praying together, cooking together, breaking fast together creates an essence of a wellknit family



Less Paced Life. Enables Connecting with Self

The less chaotic schedule offered a perfect opportunity to introspect life, in an otherwise very busy Ramadhan schedule. It was like watching myself in a parallel dimension.



From Indulgence to Generosity

The desire for social status and standing-out during this Raya was not strong, due to less opportunity for social validation. So no fancy iftar buffets or no expensive gifting. However, the 'spirit of giving', through acts like Donation etc. continued



Different Rituals. Same Essence

As praying in the mosque was not allowed, the Imam was not leading the prayer. But it didn't restrict the head of the family to recite the beautiful words of Allah at home, with the virtual companion of your siblings, parents, relatives or friends



WHY IS THIS HAPPENING?



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Loss of Income, hence less festive but stronger faith

Ramadhan is the time when Muslims are expected to empathize and support the less fortunate ones. However, the uncertainty in the job market made it more important to be frugal, spending only on essentials.



Missing the key traditions (Balik Kampung)

Balik Kampung is a key highlight of Eid with planning and preparations coming together for a trip back home.

With restricted movements, it was impossible for many to 'balik kampung'.



Lack of sensorial feast & festive vibes

This Ramadhan was not associated with the fast-breaking bazaar and community buffets, hence the festive spirit got hampered.

Those favourite stalls were missed at the Bazaars - Raja Murtabak & 1001 Beriani Gamat TTDIs, The Roti John at PutraJayas



No physical togetherness & socializing

Be it the ambience of community prayers for Night Prayers (Terawih) where there is usually a supper session after prayers in the mosque, or visiting relatives with gifts – these social engagements were missed out



WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?



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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

> Many people will choose not to participate in crowded gatherings yet would like to experience the festive spirit.



Consumer tension...

"I want to have moments of fun and socializing but would like to feel safe by not compromising on my health or privacy"



What could brands do...?

CREATE A VIRTUAL OR **NEW SOCIAL SPACES**

Find ways to authentically curate a festive experience digitally or create ways to get people to the venues, events and activities by assuring safety



How this could come to life?

GAMIFICATION OF FESTIVE EVENTS 8 EXPERIENCES



Consider virtual parties for your customers and employees. Your brand ambassador could host a specially designed Spotify list, a virtual party or an event. There are many possibilities where your brand values can converge with current consumer needs



WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?



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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

One wants to remain connected to the inner social circle, even during turbulent times, as it gives me a sense of belonging



Consumer tension...

"Even during turbulent times, I want to remain engaged and connected to my core family"



What could brands do...?

CREATE FAMILIAL INSTEAD OF A SOCIAL-COMMUNITY

The concept of community is dynamic in today's era, while a family brings stability.

Hence in the new-world order, the familial community triumphs



How this could come to life?

CREATE ENGAGING
MOMENTS WITH
FAMILY, MAKING
INDOOR LIFE
ENJOYABLE







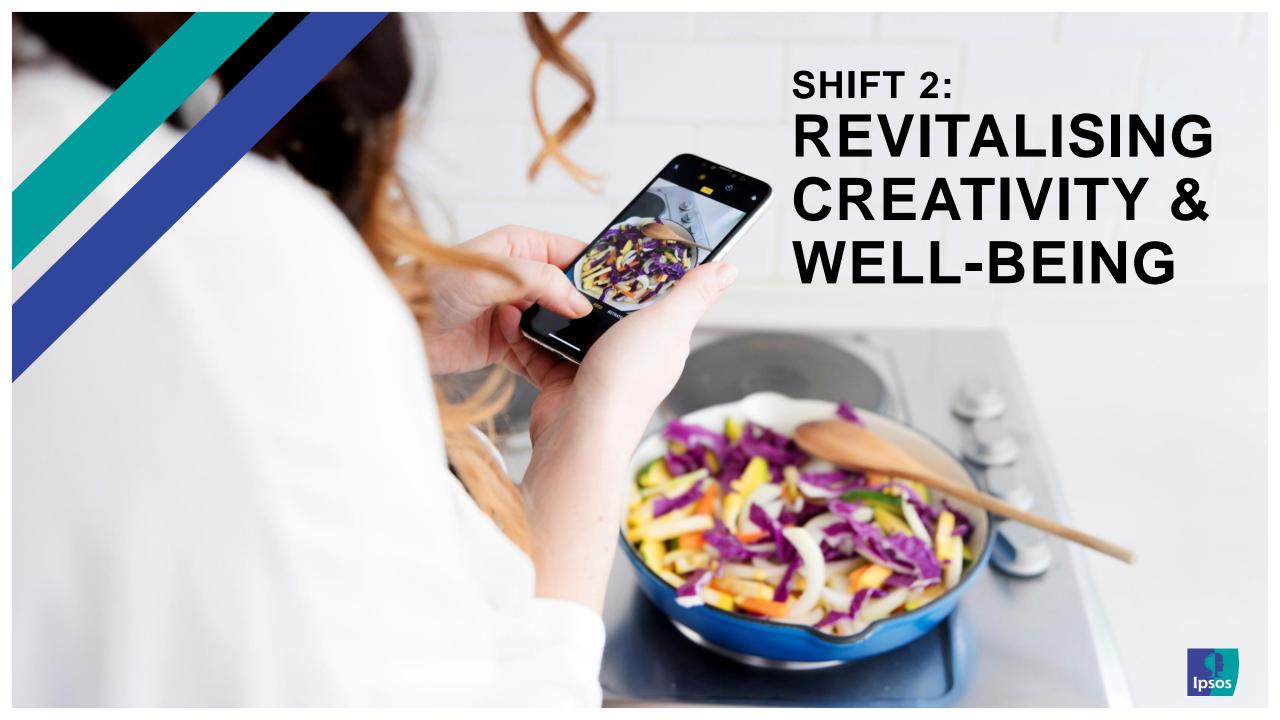
Hundreds of audiobooks released free on Audible to ease cabin fever by Colm Gorey











WHAT IT MEANS?





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Pursuing new passions and interests to achieve a feeling of self-accomplishment and to fight boredom

There is rise of holistic well-being as a practice, with consumers aiming at maintaining one's physical and mental well-being

4 big themes are identified under this shift





Democratization of creativity



Rise of Holistic well-being



Being mindful and promoting mental health



Today's Home is Tomorrow's Sanctuary





WHY IS THIS HAPPENING?





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Democratization of creativity

Lockdown brought out hidden kitchen talents and other creative pursuits in Malaysians

With a lot of content readily available via mobile technology, a new ecosystem of learning and sharing is witnessed



Rise of holistic well-being

Wellness becoming much more than healthy eating and fitness classes, and is increasingly about personal optimization of mind, body and soul.

People are becoming more aware of what goes into their bodies.

More emphasis on organic food, home-cooked food & immunity boosting diets



Being mindful and promoting mental health

Mindfulness is becoming more prevalent.

Meditation, improving mental health, addressing depression due to lockdown are key conversation topics



Today's Home is Tomorrow's Sanctuary

With more people spending disproportionate time at home, it is seen as places of calm sanctuary away from hectic workplace.

Many have started to sense how lockdown would transform our inside worlds by redefining (and redesigning) our homes



WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

People would constantly strive to make time for creative pursuits to stay occupied and mentally stable



Consumer tension...

"I'm trying to meaningfully stay engaged, adapt and to create positive experiences while at home in the new normal"



What could brands do...?

BRANDS NEED TO FIT IN THE NEW CONTEXT OF SELF-CREATION

Brands will need to stay close to consumers in this new narrative of 'hyperskilling' and constant self-development



How this could come to life?

CREATING
POSITIVE
EXPERIENCE
AT HOME







WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

People would choose to celebrate at home and not at conventional venues for events and parties



Consumer tension...

"I want my home to be the festive destination, by giving everyone a unique experience"



What could brands do...?

CREATE IN-HOME CONSUMER GENERATED EXPERIENCES

Help people to turn their homes into awesome entertainment venues, by enabling them to be amazing hosts.

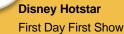


How this could come to life?

ON-DEMAND, PERSONALISED SERVICES









WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

You can also access data about consumer's habits, interests and passionpoints through device data



Consumer tension...

"Too much of choices confuse me. Wish I had products which are more personalized to my needs"



What could brands do...?

CURATE BEHAVIOURAL DATA TO CREATE BRAND RELEVANCE

This allows you to make better predictions as to which brands or products are most likely to appeal to them



How this could come to life?

PERSONALISED RECOMMENDATION **OF PRODUCT & EXPERIENCES**



If your consumers are enrolling to online workout sessions with an interest to eat healthy. then accordingly build an association with your product.

Partnering with food delivery apps also work here, as you would get to know whether your consumer is swaying more towards healthy eating or junk indulgence. Accordingly build a proposition for your brand





WHAT IT MEANS?





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Purchases are made due to practical reasons but considerations may have been compromised

Limited movement forces Muslims to adapt their shopping behavior. At normal times, the Eid buzz is being felt at the shopping areas 2 weeks before the festivities, which was not the case this year.

Also due to social distancing, we witness changes in purchase behavior and also role reversals in the context of shopping

Following are the 4 big themes are identified





Husbands can shop too



Panic buying syndrome



Small joy
→ small SKU



Practicality instead of flaunt





WHY IS THIS HAPPENING?

Overview | Cultural Drivers | Implications



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Husbands can shop

Strict MCO protocols allows for only family heads to be out for purchases

This led to unique shopping challenges that the head of the family had to tackle

Funny memes and communications were rampant



Panic Buying Syndrome

During the initial phase of MCO, fear and anxiety were heightened

Selected popular items were seen to be constantly running our of stock - E.g. bread (Gardenia), spread, rice and cooking oil (Halal brands).



Small Joy → Small SKU

As the MCO progressed, there was an acceptance that Eid in 2020 is not going to be a big social festivity

Preparation for Eid was done in a smaller scale

Smaller SKUs and moderation consumption took place instead of excess consumption



Practicality instead of flaunt

The scale of the festivity was small, hence no motivation to stand out from the crowd

Many have opted to 'reuse' the old Eid items - clothing, drapery, decorations

No luxurious gifting took place



WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

There would be a rise of the male shopper



Consumer tension...

"As the head of the family I would like to take part in tasks like shopping, however I find the whole process quite painful"



What could brands do...?

OFFER A SIMPLIFIED RETAIL EXPERIENCE

Brands could assist retail chains in offering carefully curated selections to the timestrapped male shoppers

Access to quick references will also help unfamiliar shoppers



How this could come to life?





WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

The culture of moderation to dominate the culture of over-indulgence



Consumer tension...

"Indulgence is accepted but in moderation. I do not believe in wastage"



What could brands do...?

FIXING THE PROBLEM OF EXCESS INDULGENCE

Brands could inspire shoppers to opt for a more sustainable and restraint consumerism



How this could come to life?

FRUGAL SHOPPING







DIGITAL UBIQUITY

WHAT IT MEANS?

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Overview | Cultural Drivers | Implications

Recreation & faith embracing technology

Physical connectivity is substituted by virtual connectivity.

Not just for Ramadhan and Raya, the Movement Control Order in Malaysia help to push the huge surge of online presence, for both content creators and viewers.

Technology is seen as a savior to many people – where there is continuity of work, variety of entertainment content available, and how socializing can be maintained regardless of location





Heighten demands for Digital entertainment



Get-togethers without getting together



Keeping faith through digital means









DIGITAL UBIQUITY

Overview | Cultural Drivers | Implications







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Heighten demands for Digital entertainment & gaming

Most consumers experienced an increase usage of smartphone internet, laptop or video game console during this period. Most use their downtime to catch up on their long watch list of movies, backlog of video games or even playing casual games on their smartphones



Keeping faith through digital means

Due to the mosque being offlimits, people are turning into online hosted religious classes to learn

These sessions are hosted mostly through Facebook, Instagram and what used to be paid content are now free to view. with the intention to share knowledge freely

Emergence of digital wellness content & advisors

The trend of 'lockdown fitness' via online work-out sessions conducted by yoga instructors, fitness experts and psychologists help people to unwind and stay in shape. These are through membership or pay-per-session

Personal care shops such as barbers, and beauty saloons being closed, local influencers / make up artists uploading content on how to 'cope' with the lockdown becomes a trending topic.





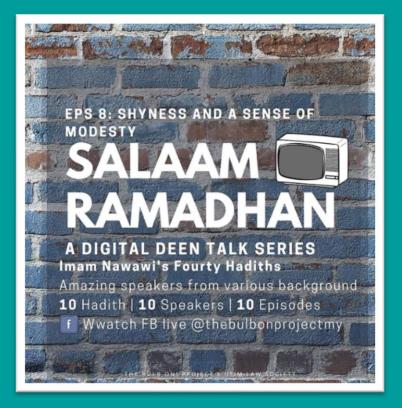


WITH THE HELP OF NEW MEDIA AND TECHNOLOGIES, ISLAMIC EDUCATION SESSIONS CONTINUED TO BE HELD THROUGH FACEBOOK/INSTAGRAM LIVE.











DIGITAL UBIQUITY

WHY IS THIS HAPPENING?



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Overview | Cultural Drivers | Implications

Get-togethers without getting together

Breaking of fast and celebrating Raya has always been a group / community effort. With the help of numerous free platforms (Zoom, WhatsApp, Skype), people are connecting online with family & friends while breaking fast, enjoying meals during Raya



People are setting scheduled iftar sessions, scheduled Raya catchups with self imposed dressing codes to fully immerse themselves in the celebration.

Emergence of – 'The Third Space'

Live sessions on social media, on-demand and streaming services making any space a social space during Covid-19, thus giving rise to a new concept to social venues

Music shows, live bands, chart-topping musicians have all started performing virtually, let it be through 'Instagram live', Facebook live, or even streaming giant 'Twitch' and YouTube.



This is a way for them to reach their fans without having to perform physically on stage, as well as bringing joy to people during trying times



MANY MEDIA COMPANIES AND ARTISTS HAVE JUMPED INTO THE BANDWAGON TO HELP FULFILLING THE DEMAND BY CONDUCTING LIVE MUSIC CONCERT AND UPLOADING FREE DRAMA/MOVIE ON SOCIAL MEDIA.











DIGITAL UBIQUITY

WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

People's lives are fluid and they would like to be involved in events or activities regardless of physical distance



Consumer tension...

"I want to be a part of an event, learn be able to entertain myself without tied to a routine or traditional socializing patterns"



What could brands do...?

HOST EVENTS IN ONLINE THIRD SPACE

Leverage social media / online platforms to bring people to the venues e.g. Launch your brand on TikTok account – it's a great investment to connect with younger audience



How this could come to life?

ESTABLISHING BRAND PRESENCE THROUGH ORGANIC CHANNELS

CHANNELS

Harness social media to create spontaneous social gatherings by transforming familiar locations to venues. Make your

brand visible there

Jao Tim Art Deco Glamour

This cafe attracts patrons with its Art Deco glamour, has shifted its jazz concerts and jam sessions to Instagram Live, featuring one musician a day from 9pm to 10pm



This website allows people to invite their favourite artists to perform



DIGITAL UBIQUITY

WHAT BRANDS COULD DO TO RIDE ON THIS SHIFT?





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Overview | Cultural Drivers | Implications

Imagine future festive occasions where ...

Brands will only create meaningful connections through digital platforms



Consumer tension...

"When I share so much of my social life online, it's more than just connecting with people... it's about being known for my views"



What could brands do...?

CREATE USER GENERATED CONTENT

Encourage your loyal followers and customers to share about brand stories on social media. Everyone with a smartphone is a potential brand ambassador



How this could come to life?

USE INSTAGRAM AS TRADE & AFFINITY CHANNEL

Connect your online store to Instagram Shopping so you can tag products in posts and stories

Share user-generated content in both your stories and your feed to thank your followers for shopping or ordering from you during this time. Use usergenerated (consumer-generated stories) - example: Maggi lockdown recipes, Awesome Milo Milk Shakes,



THANK YOU! Q&A

