COVID POSITIVE

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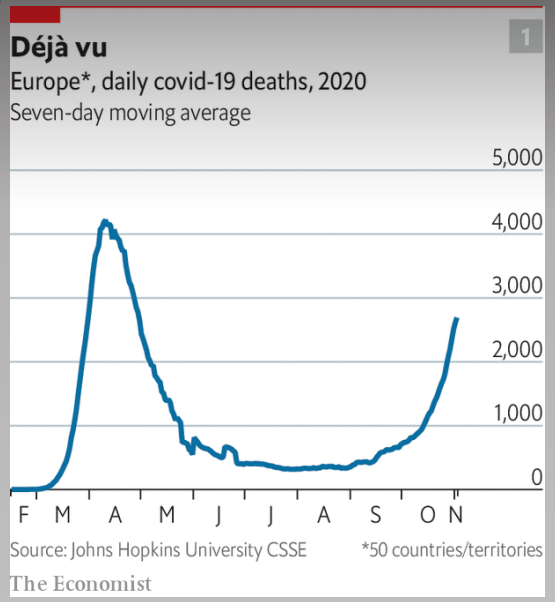
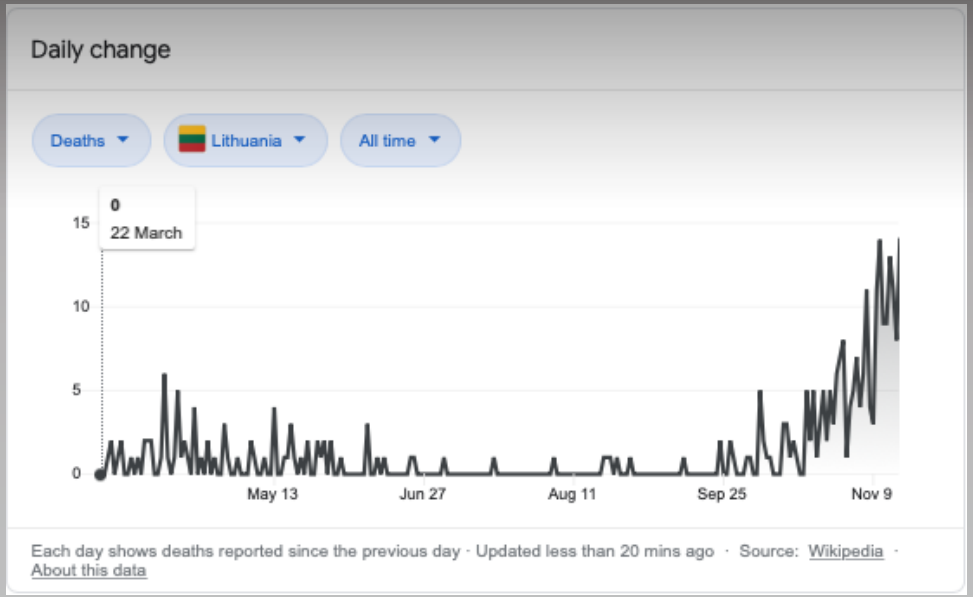
WINTER IS COMING





© Inspired UM 2020 | Data: https://www.economist.com/briefing/2020/11/07/the-second-wave-of-covid-19-has-sent-much-of-europe-back-into-lockdown

Economics

Europe's Economy Will Reopen for Christmas, JPMorgan Predicts

By Carolynn Look
2020 m. lapkričio 12 d. 13:14; GMT+2

Bloomberg

Economics

Saving Christmas From Covid Is More Critical for Britain

The U.K. relies more on retail than other big European economies and 20% of consumer spending comes in the last two months of the year.

By Deirdre Hipwell and David Goodman
2020 m. lapkričio 13 d. 07:00; GMT+2

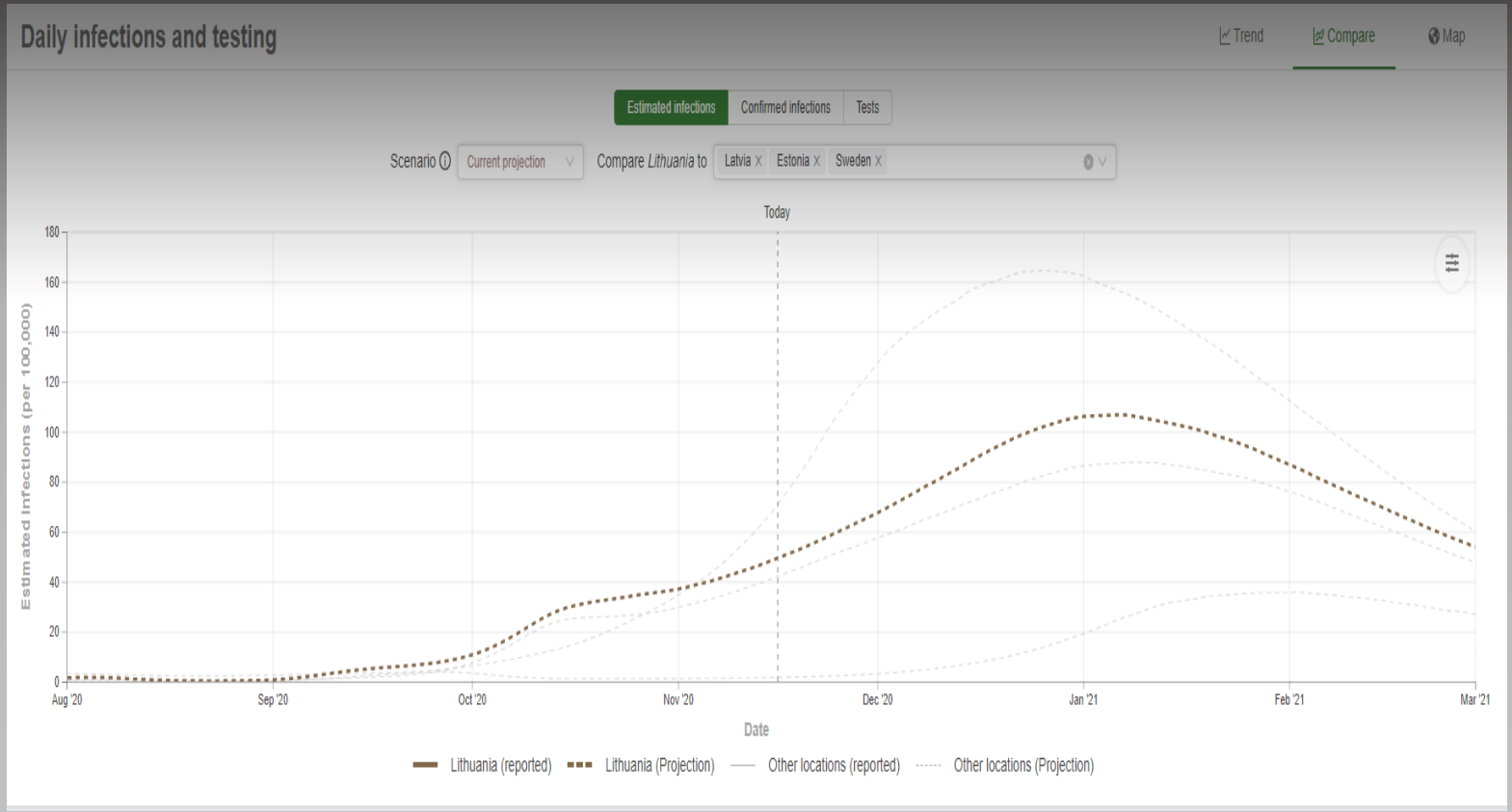
Europe's Second Lockdowns
JPMorgan analysts expect economy to reopen before Christmas

	Start date	Intended end date
Germany	Nov. 2	Nov. 30
France	Oct. 30	Dec. 1
Italy	Oct. 26	Nov. 22
Spain	Oct. 26	Not decided yet
Netherlands	Oct. 23	Nov. 19
Belgium	Nov. 2	Dec. 13
Ireland	Oct. 20	Not decided yet
Slovakia	Oct. 15	Not decided yet
UK	Nov. 5	Dec. 2

Source: JPMorgan

© Inspired Life 2020 | Data: https://www.bloomberg.com/news/articles/2020-11-12/europe-s-economy-will-reopen-for-christmas-jpmorgan-predicts;

THE DARKEST HOUR



© Inspired UM 2020 | Data: The Institute for health metrics and evaluation (IHME) http://covid19.healthdata.org/global?view=social-distancing&tab=trend

The Economist | Today | Weekly edition | Menu

Science & technology

The shot that rang across the world

Pfizer's and BioNTech's vaccine is the start of the end of the pandemic

Its 90% effectiveness is as good as it gets, and bodes well for other vaccines. But getting them quickly to the right people will be hard

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Health | Coronavirus

Covid vaccine: First 'milestone' vaccine offers 90% protection

By James Gallagher
Health and science correspondent

1 day ago

Coronavirus pandemic

Bloomberg

World

Moderna Vaccine Found Highly Effectiv at Preventing Covid

By Robert Langreth
2020 m. lapkričio 16 d. 13:58; GMT+2 *Updated on 2020 m. lapkričio 16 d. 14:21; GMT+2*

- Vaccine has 94.5% efficacy in an analysis of late-stage trial
- Interim results suggest vaccine may also block severe cases

LanguageLine Solutions

BREAKING

Early Data Show Moderna's Coronavirus Vaccine Is 94.5% Effective

Moderna is the second company to report preliminary results from a large trial testing a vaccine. But there are still months to go before it will be widely available to the public.

Moderna Therapeutics in Cambridge, Mass. Tony Luong for The New York Times

FARMA LENKTYNĖS

Coronavirus Vaccine Tracker

By Jonathan Corum, Sui-Lee Wee and Carl Zimmer Updated November 10, 2020

PHASE 1	PHASE 2	PHASE 3	LIMITED	APPROVED
38	14	11	6	0
Vaccines testing safety and dosage	Vaccines in expanded safety trials	Vaccines in large-scale efficacy tests	Vaccines approved for early or limited use	Vaccines approved for full use

BIONTECH Pfizer FOSUN PHARMA

moderna NIH National Institutes of Health Turning Discovery Into Health

Johnson & Johnson Beth Israel Lahey Health Beth Israel Deaconess Medical Center

AstraZeneca UNIVERSITY OF OXFORD

NOVAVAX Creating Tomorrow's Vaccines Today

BHARAT BIOTECH icmr INDIAN COUNCIL OF MEDICAL RESEARCH

CanSinoBIO

武汉生物制品研究所有限责任公司 WUHAN INSTITUTE OF BIOLOGICAL PRODUCTS CO.,LTD.

murdoch children's research institute

sinovac

МИНИСТЕРСТВО ЗДРАВООХРАНЕНИЯ РОССИЙСКОЙ ФЕДЕРАЦИИ

A full field

Selected covid-19 vaccines in phase-three clinical trials, 2020

Developer	Type	Doses	Participants*	Study location	Phase-3 start date
Johnson & Johnson	Viral vector	1	60,000	International	Sep 7th
AstraZeneca/Oxford University	Viral vector	2	50,000	International	Aug 28th†
Novavax	Inactivated	2	45,000	Britain, US, Mexico	Sep 28th
Pfizer/BioNTech	mRNA	2	43,998	International	Jul 27th‡
Gamaleya (Sputnik V)	Viral vector	2	43,600	International	Sep 7th
Moderna	mRNA	2	30,000	United States	Jul 27th
Sinovac	Inactivated	2	27,980	International	Jul 21st

Sources: PLOS; VFA; ClinicalTrials.gov; press reports *Estimated number of enrolees in phase three †US trial ‡Announcement of phase 2/3

The Economist

Coronavirus Drug and Treatment Tracker

We are following **22 coronavirus treatments** for effectiveness and safety:

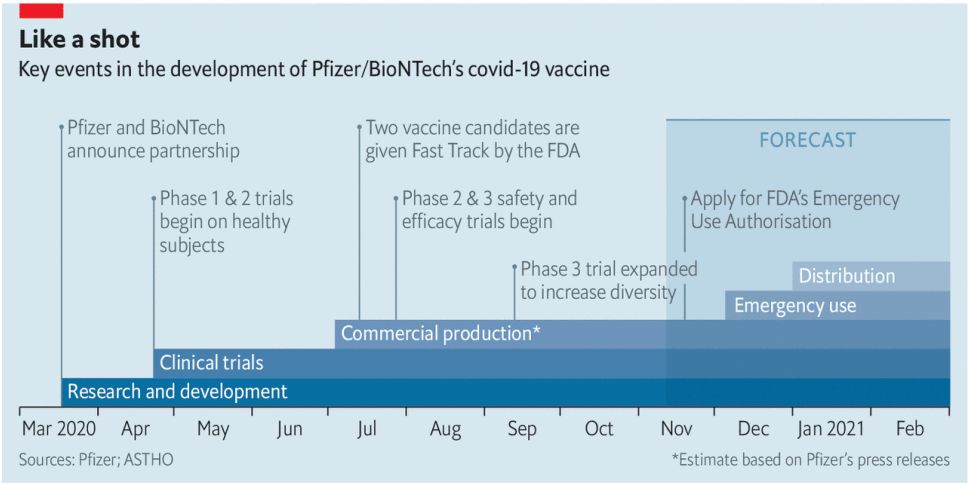
F.D.A. approved	Widely used	Promising evidence	Tentative or mixed evidence	Not promising	Pseudoscience or fraud
1	2	2	13	2	3

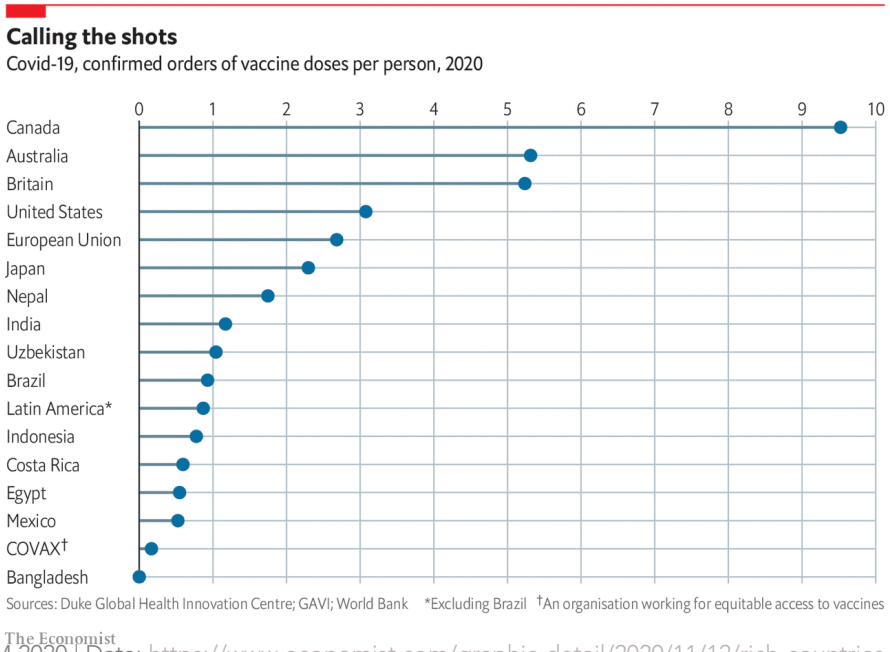
Remdesivir

Dexamethasone and Other Corticosteroids

© Inspired UM 2020 | Data: https://www.nytimes.com/interactive/2020/science/coronavirus-vaccine-tracker.html; https://www.economist.com/briefing/2020/11/14/an-effective-covid-19-vaccine-is-a-turning-point-in-the-pandemic?fsrc=newsletter&utm_campaign=the-economist-today&utm_medium=newsletter&utm_source=salesforce-marketing-cloud&utm_term=2020-11-12&utm_content=article-link-1&etear=nl_today_1

VAKCINŲ KARAI





© Inspired UM 2020 | Data: https://www.economist.com/graphic-detail/2020/11/12/rich-countries-grab-half-of-projected-covid-19-vaccine-supply; https://launchandscalefaster.org/COVID-19

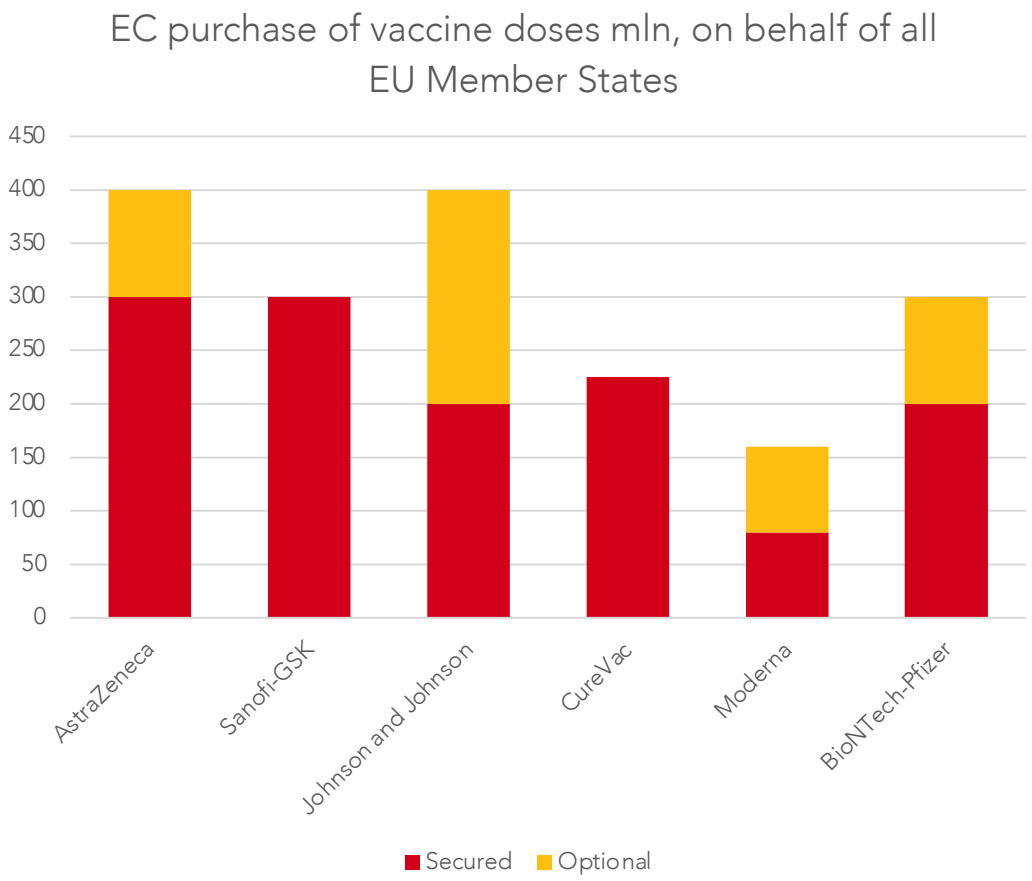
Home > Press corner > Commission approves contract with BioNTech-Pfizer

Available languages: English

Press release | 11 November 2020 | Brussels

Coronavirus: Commission approves contract with BioNTech-Pfizer alliance to ensure access to a potential vaccine

European Commission



1,3mlrd vaccine doses

secured + 480mln optional

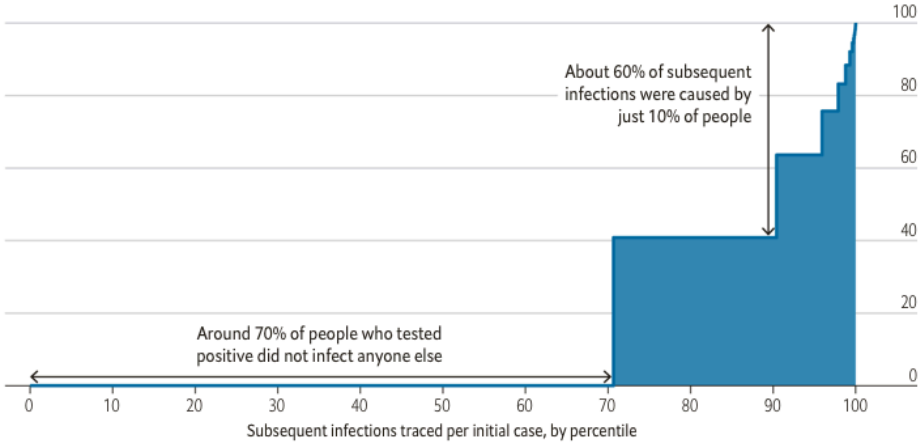
© Inspired UM 2020 | Data: https://ec.europa.eu/info/live-work-travel-eu/health/coronavirus-response/overview-commissions-response_en

inspired UM

KAS PIRMAS?

→ A small share of the population is responsible for a majority of infections

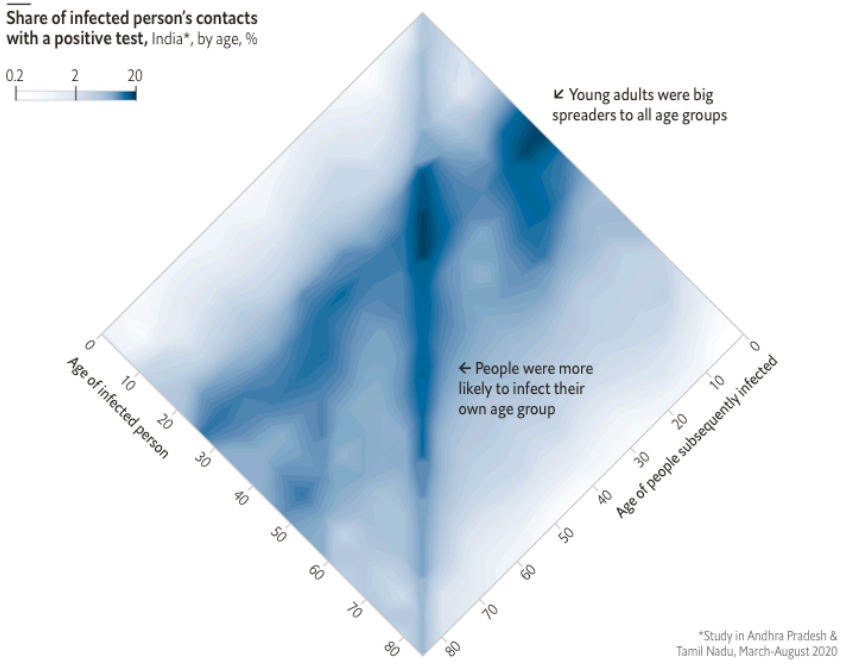
Cumulative share of subsequent covid-19 infections, %
India*, by percentile of subsequent infections per initial case



*Study in Andhra Pradesh & Tamil Nadu, March-August 2020

→ Transmission was more common among similarly aged people

Share of infected person's contacts with a positive test, India*, by age, %



*Study in Andhra Pradesh & Tamil Nadu, March-August 2020

Breaking the generation barrier
Europe*, covid-19 cases by age group, '000

Age group	July 5	12	19	26	August 2	9	16	23	30	September 6	13	20	27	October 4	11	18	25	Fatality rate†, %
0-4	2	2	3	3	4	4	5	5	6	7	9	11	10	10	11	14	19	0
5-14	4	5	5	6	7	8	10	12	14	16	22	29	31	32	43	65	97	0.01
15-24	11	12	15	16	19	21	25	29	33	39	44	57	72	117	150	170	204	0.02
25-49	46	49	52	57	62	67	80	92	100	116	132	159	171	214	306	454	671	0.127
50-64	25	25	26	28	30	31	35	42	47	56	65	78	85	111	161	239	339	0.660
65-79	12	12	11	12	13	14	16	19	21	26	29	35	38	48	69	102	153	2.548
80+	5	4	4	4	5	5	7	7	8	11	13	16	17	20	30	46	84	10.93
Total	105	108	115	126	140	150	177	207	230	270	314	383	424	553	770	1,089	1,567	1.04

Sources: WHO; Brazeau et al. (2020); *The Economist* *Estimate based on case by age where available †Estimate, includes undiagnosed infections

The Economist

© Inspired UM 2020 | https://www.economist.com/graphic-detail/2020/11/07/a-minority-of-people-with-covid-19-account-for-the-bulk-of-transmission; https://science.sciencemag.org/content/early/2020/10/21/science.abe5938; https://pubmed.ncbi.nlm.nih.gov/19696313/; https://www.medrxiv.org/content/10.1101/2020.08.07.20170456v1;

Science AAAS inspired UM

SANTRAUKA

1. Panašu, kad gruodžio mėnesį turėtume sulaukti šiokio tokio karantino atpalaidavimo, darant išlygas užsikrėtimams;
2. Žmonės iki naujų metų veikiausiai gyvens gana šventinėmis nuotaikomis;
3. Užsikrėtimų ir mirčių piką turėtume pasiekti sausio – vasario mėnesiais;
4. Piko metu galimi griežti suvaržymai ar net visuotinis karantinas;
5. Vasario – kovo mėnesiais turėtu pasirodyti pirmosios vakcinos;
6. Pavasarį vartotojų lūkesčiai vėl turėtų pradėti gerėti.

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EKONOMIKA

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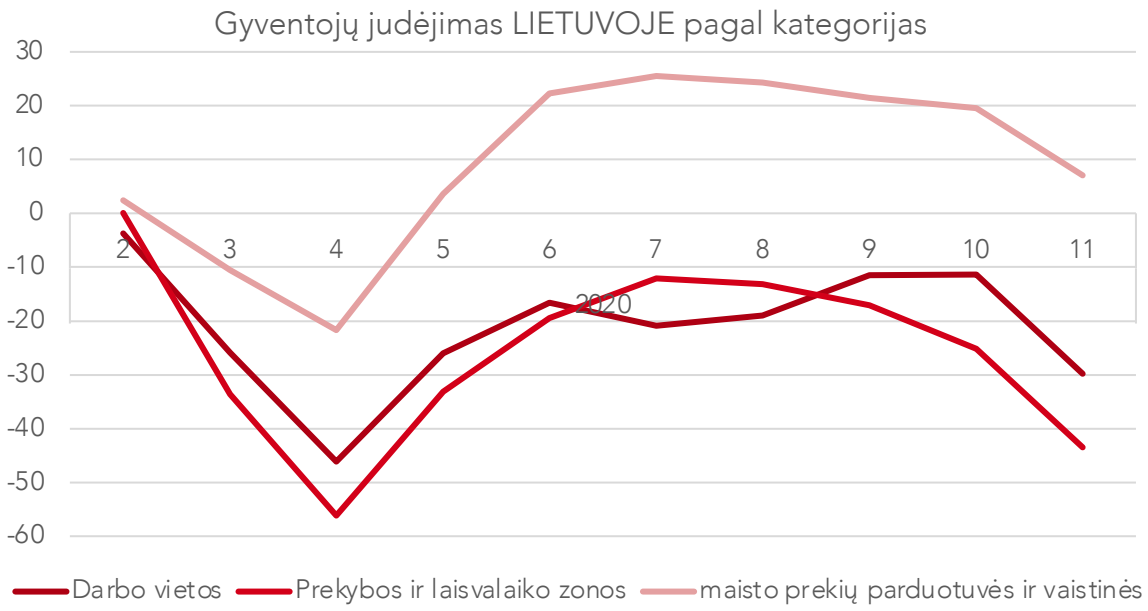

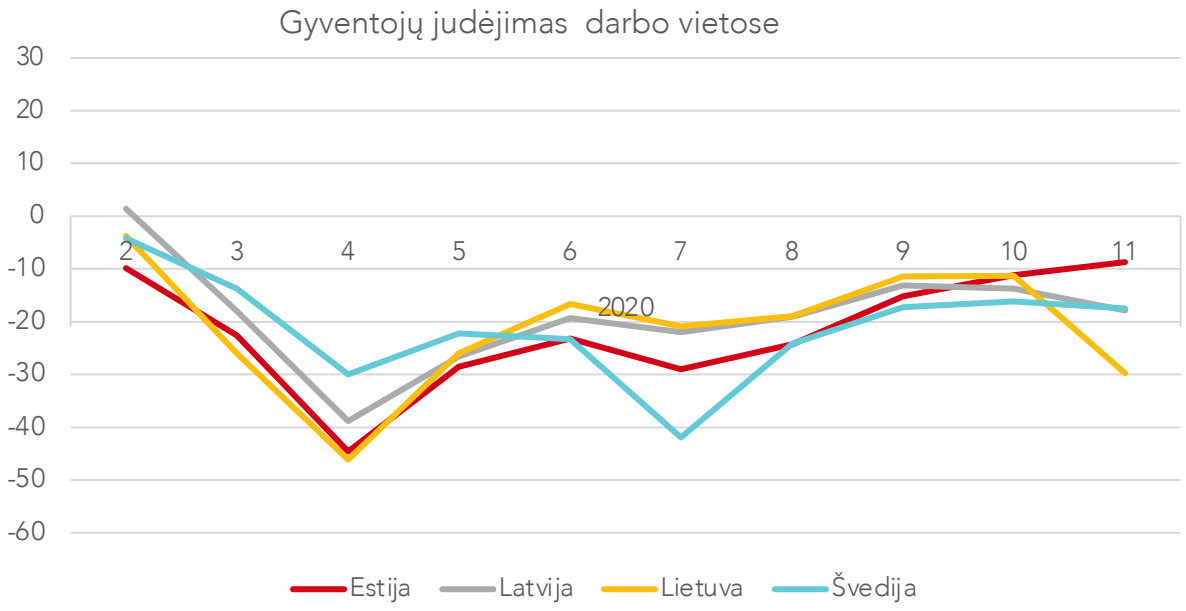

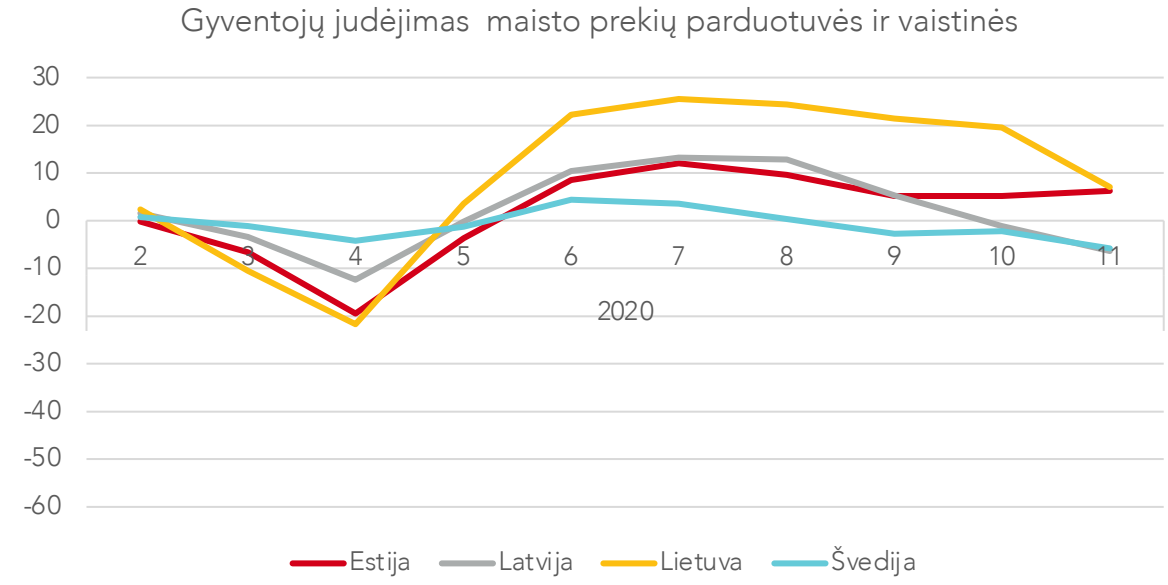

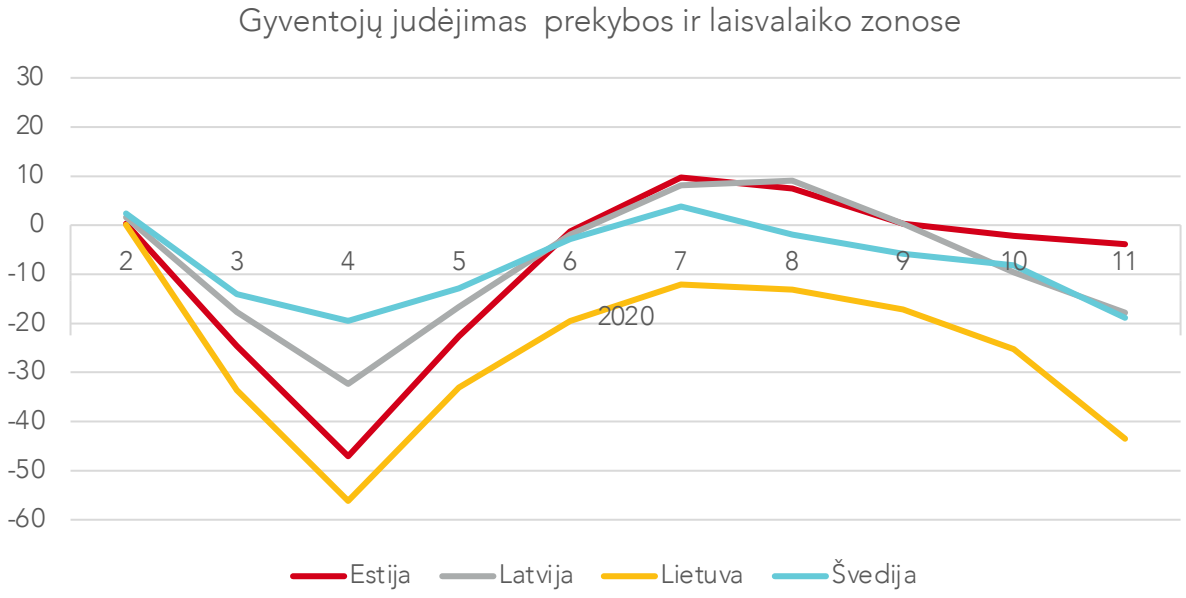

© Inspired UM 2020 | Data: Google COVID-19 Community Mobility Report,

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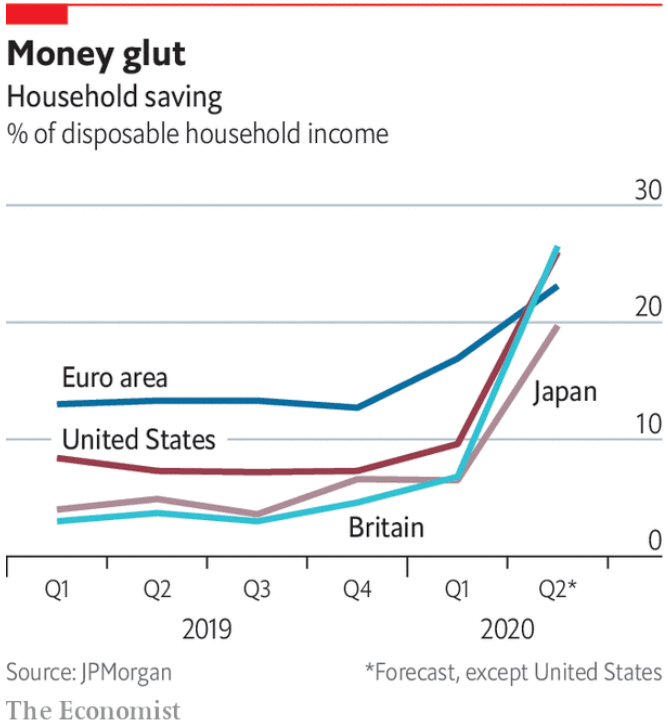
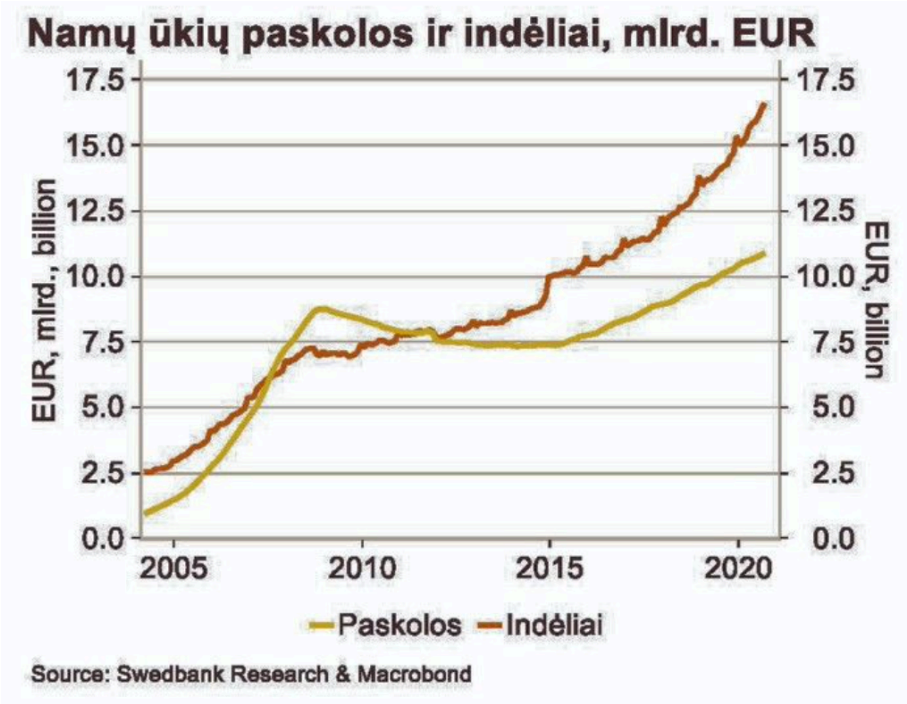
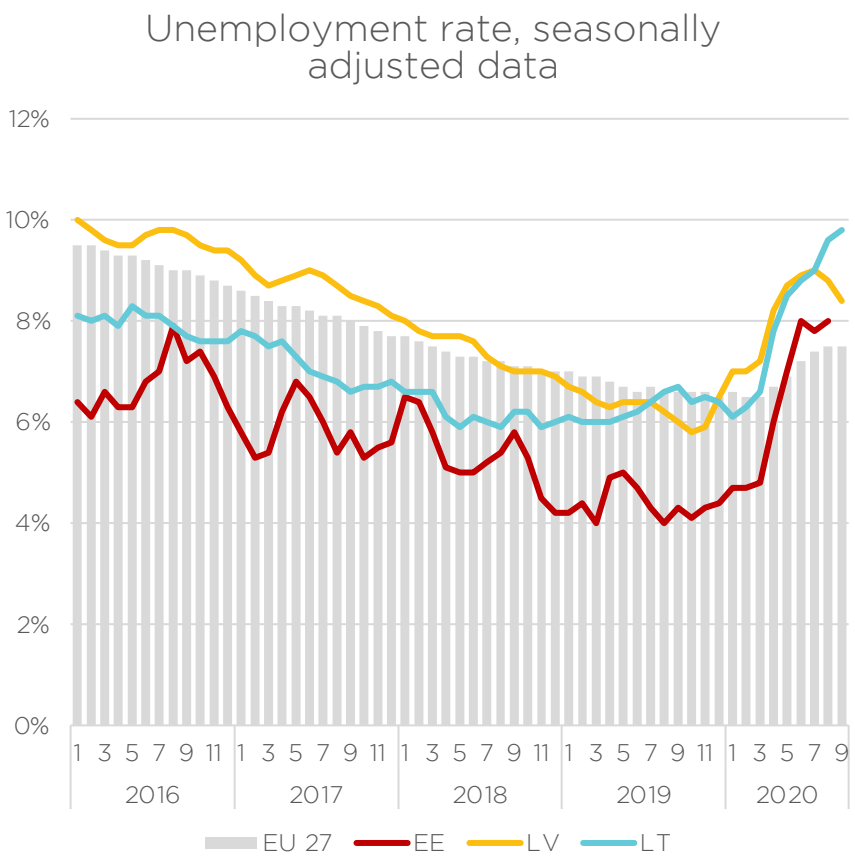
PINIGŲ MASĖ

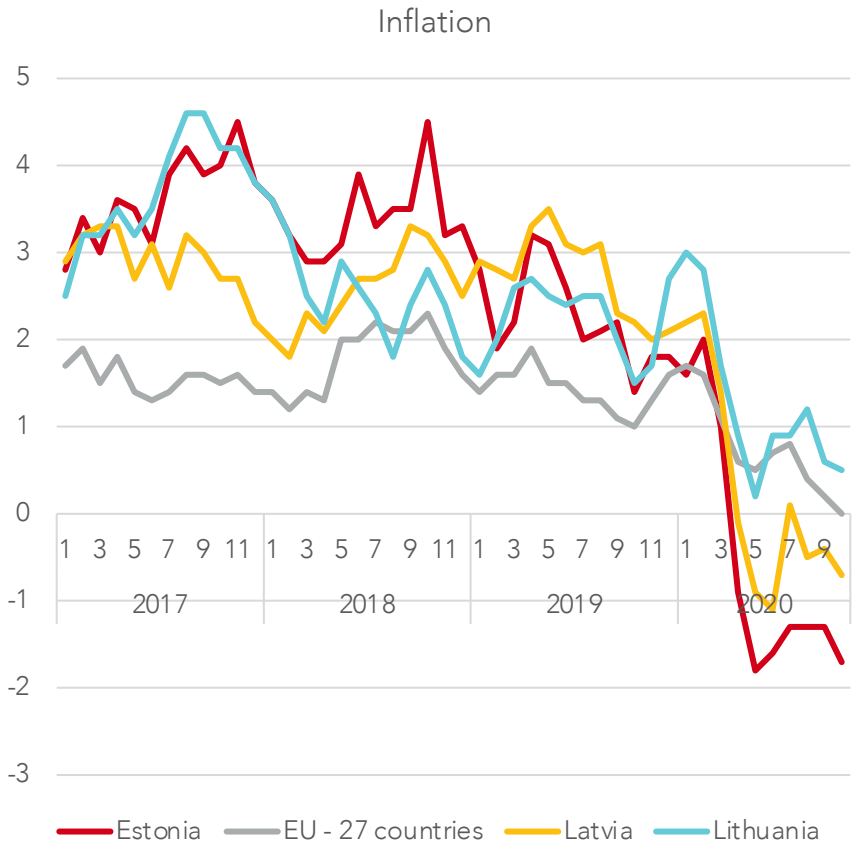


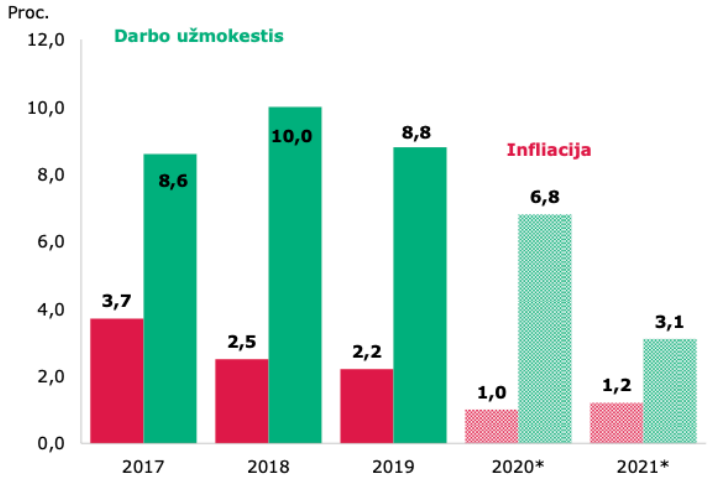


© Inspired UM 2020 | Data: Swedbank; https://www.economist.com/finance-and-economics/2020/11/07/how-economically-damaging-will-new-lockdowns-be

FINANSAI: VISKAS POZITYVU, IŠSKYRUS NEDARBĄ







Šaltiniai: Lietuvos statistikos departamentas
* Lietuvos banko prognozė

© Inspired UM 2020 | Data: Eurostat; LB

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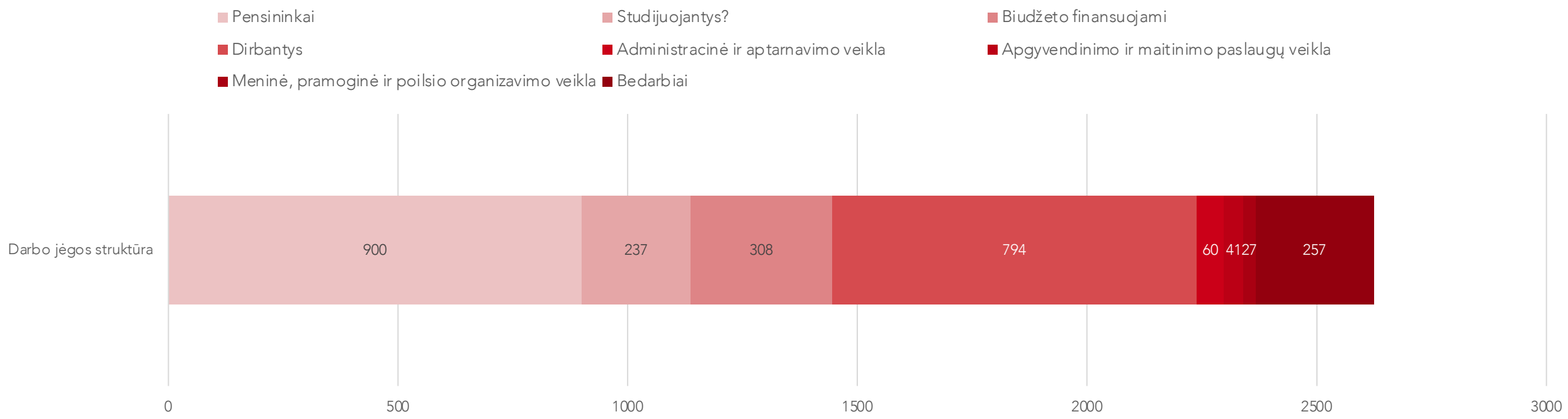
Darbo jėgos struktūra



Dabartiniu metu jau yra 30K žmonių prastovose

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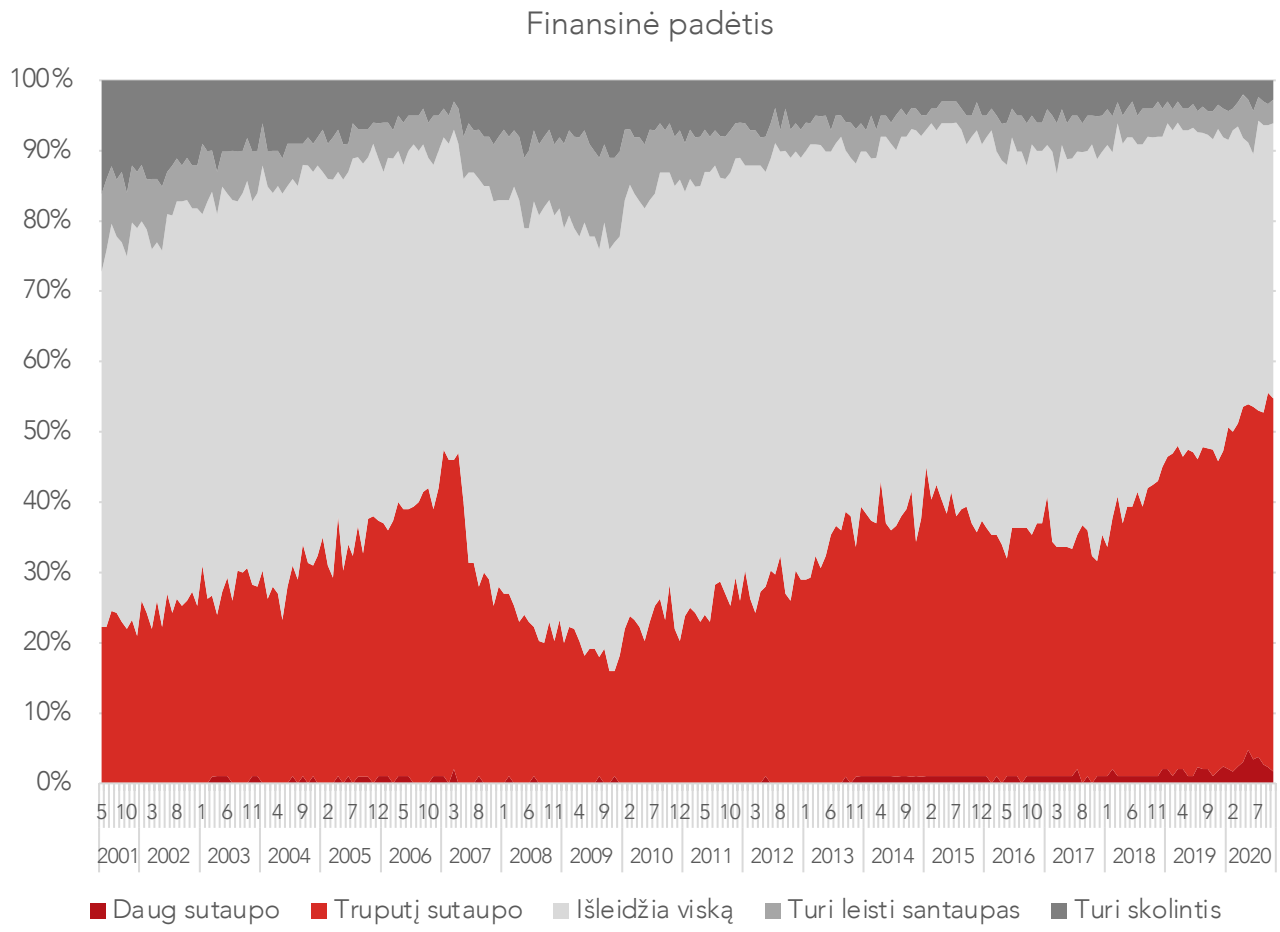
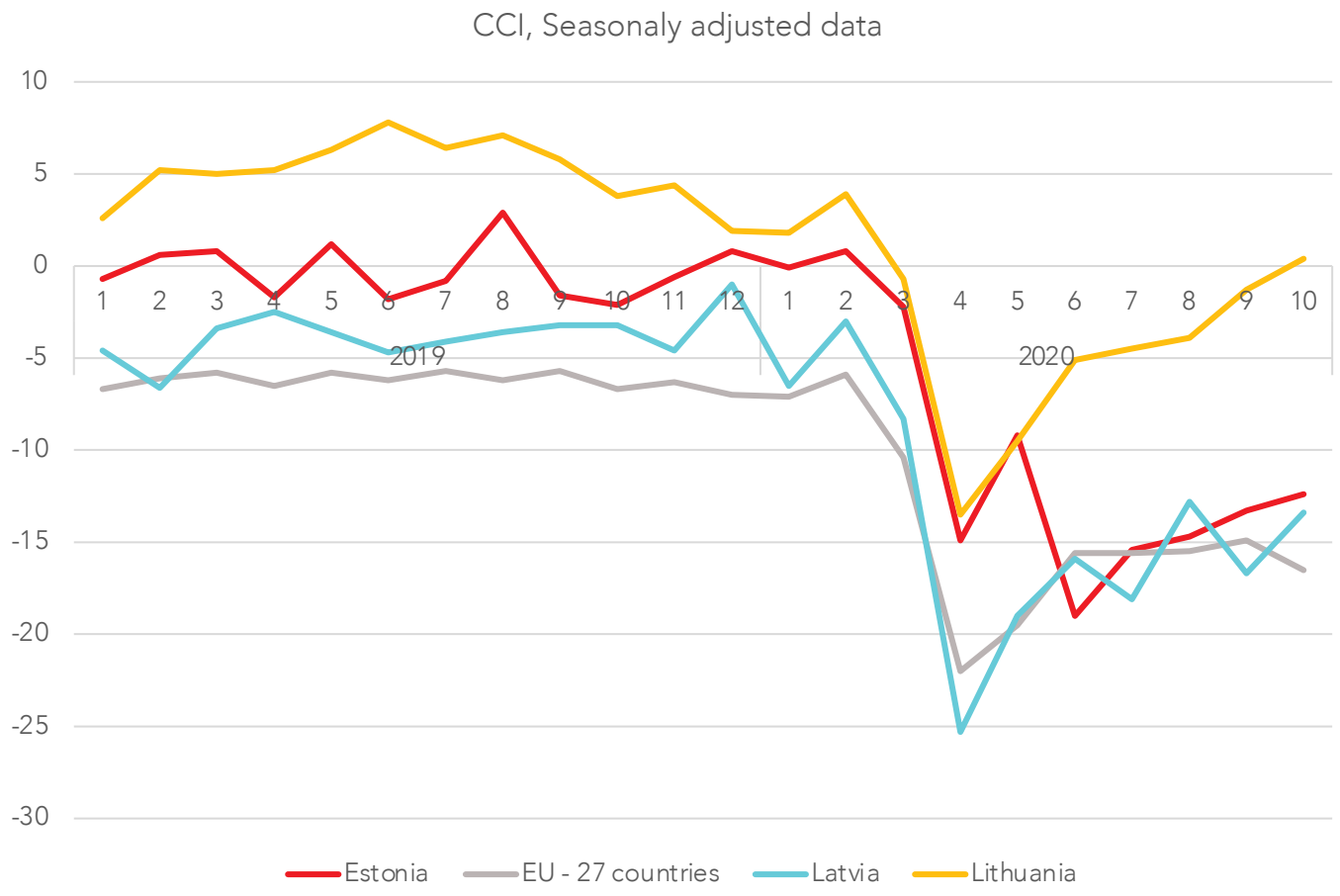
KAIP ŽMONĖS JAUČIASI

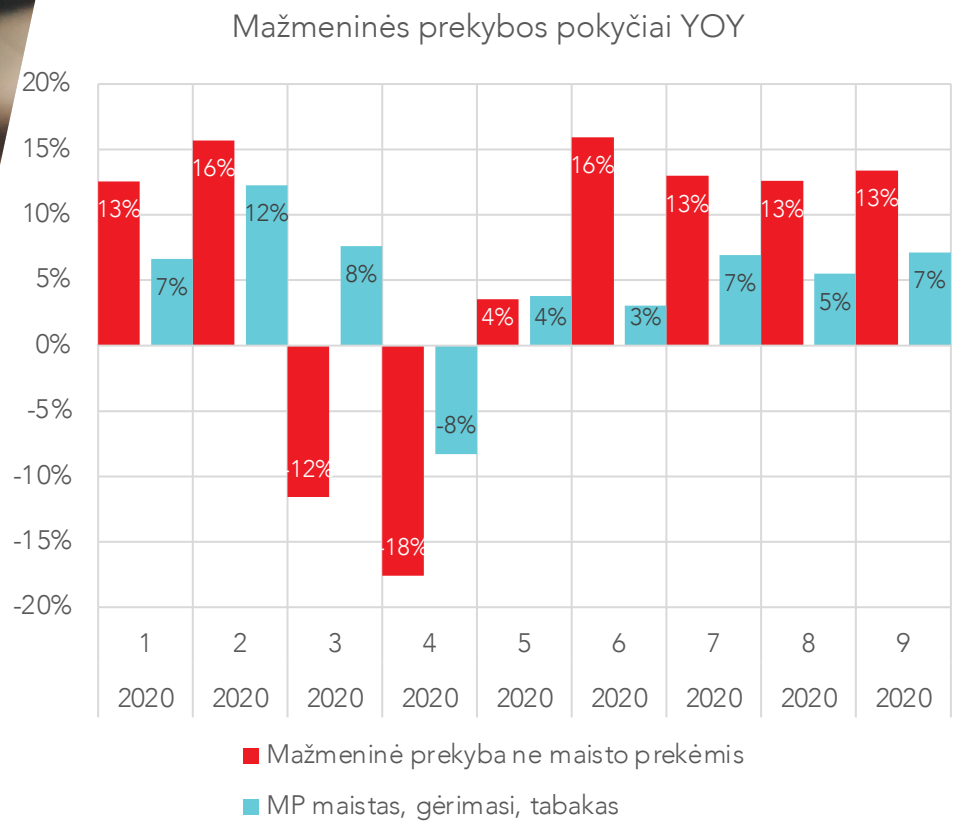


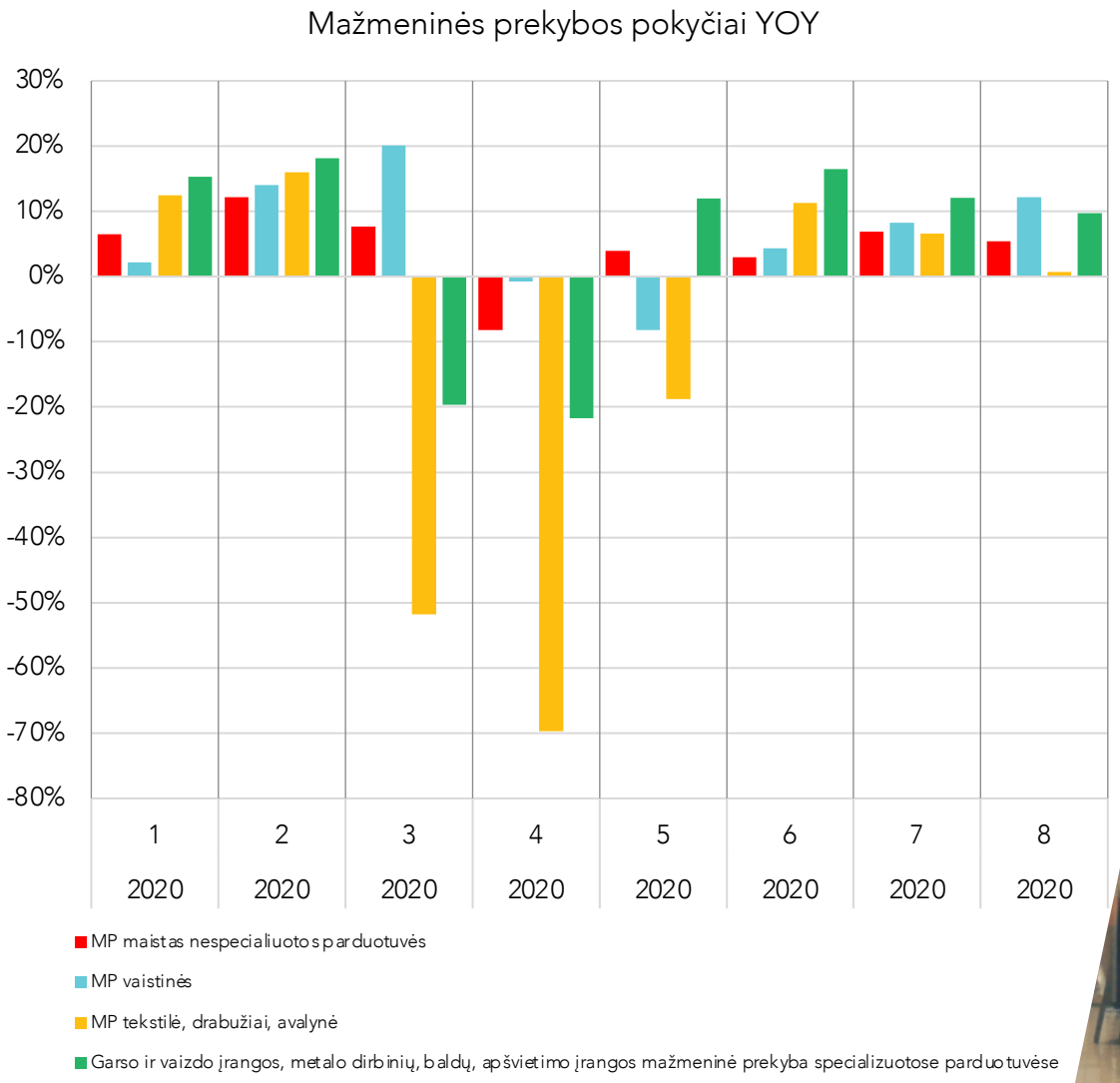
© Inspired UM 2020 | Data: Eurostat

VARTOTOJŲ PASITIKĖJIMO INDEKSAS



VARTOJIMAS





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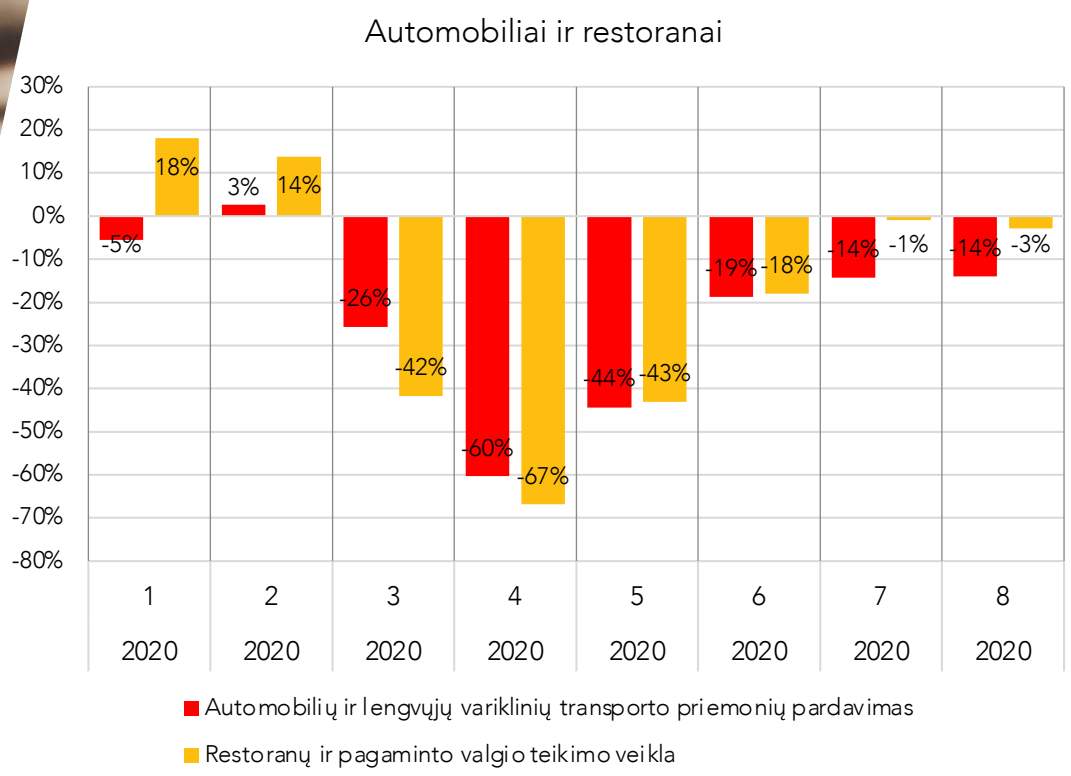

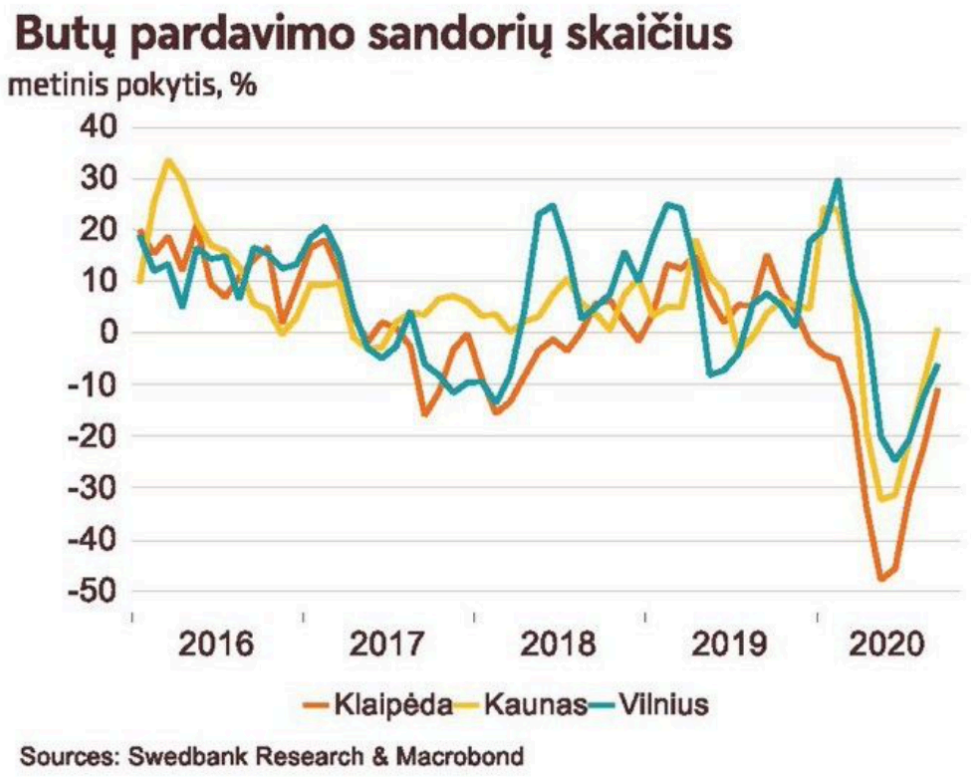

© Inspired UM 2020 | Data: Eurostat; Swedbank

EKONOMINĖ KRIZĖ

V, U ar L?

Harvard Business Review

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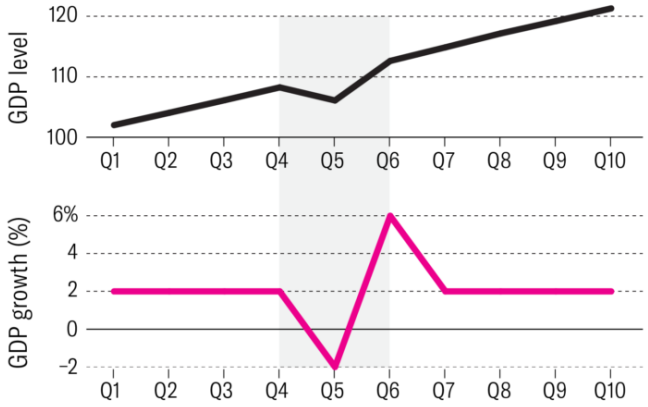
KRIZIŲ SCENARIJAI

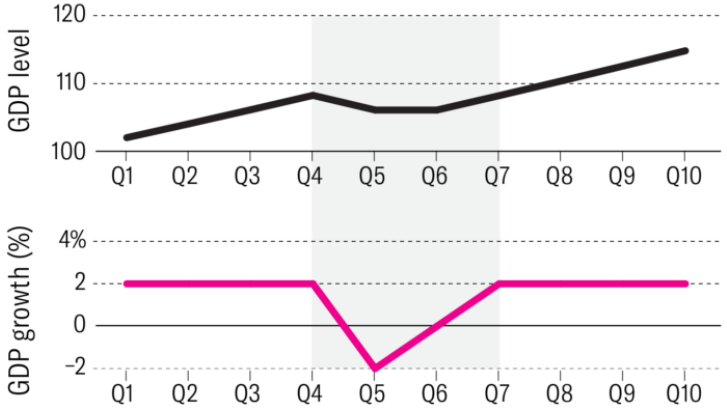
Economic Shock: 3 Scenarios

A V-shaped scenario depicts a classic economic shock, where growth eventually rebounds. In a U-shaped scenario, there is some permanent loss of output after the initial shock. An L-shaped scenario signals real structural damage, with a significant impact on growth.

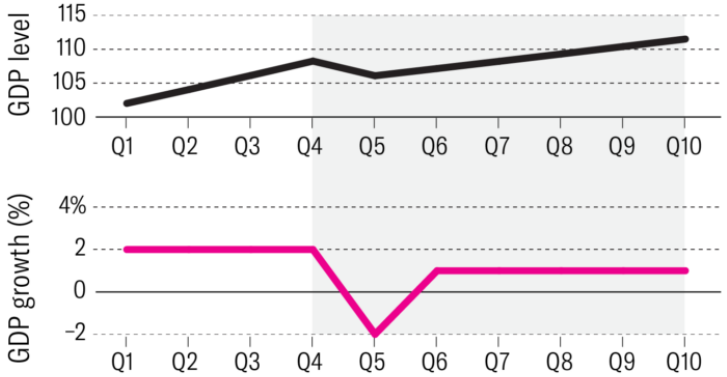
"V" scenario (likely)



"U" scenario (plausible)



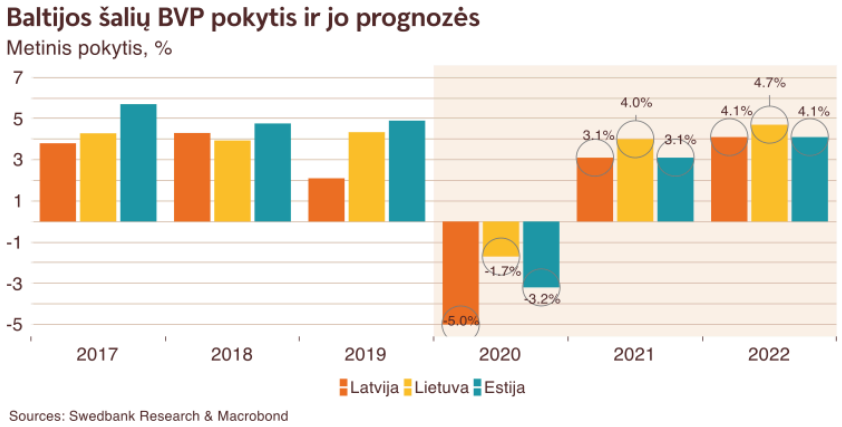
"L" scenario (unlikely)

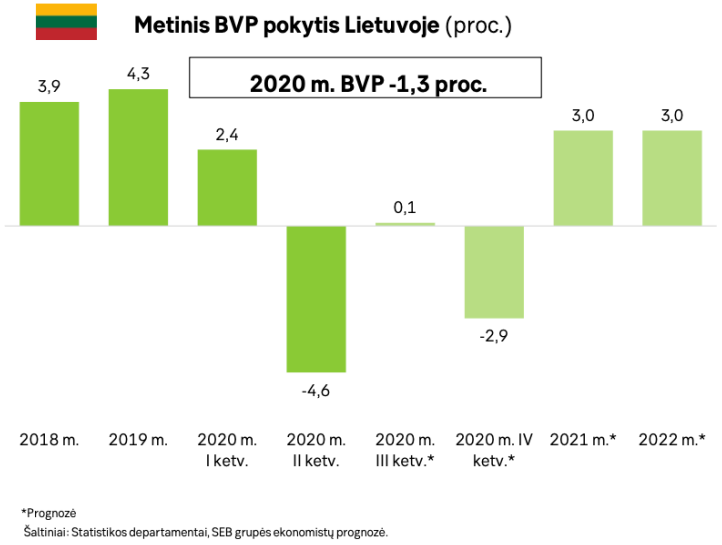


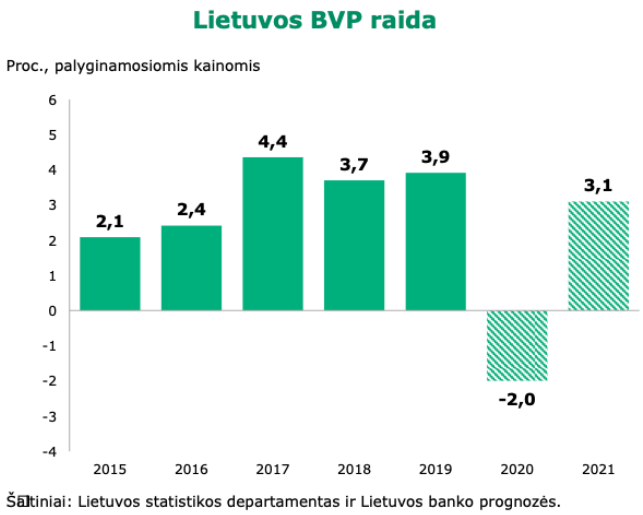
Source: BCG Center for Macroeconomics analysis HBR

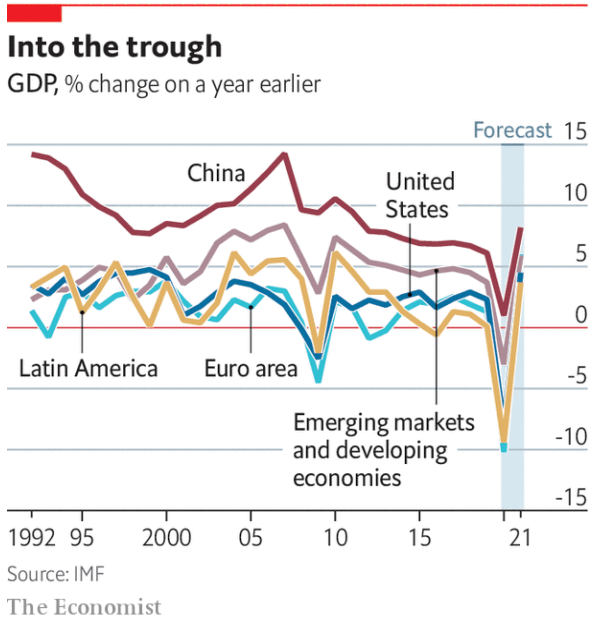
© Inspired UM 2020 | Harward Business Review, *What Coronavirus Could Mean for the Global Economy*, 2020 April

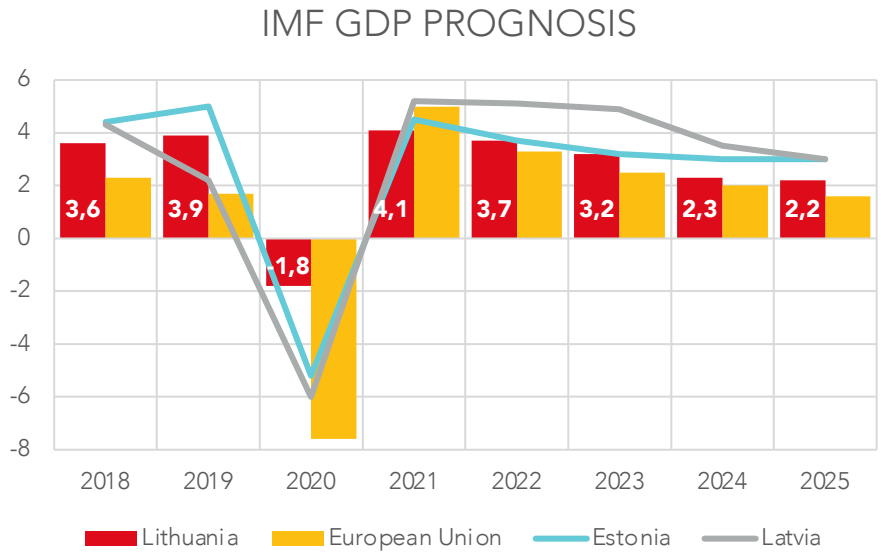
V-FORMA, AUGIMAS 3-4% 2021'ais











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SANTRAUKA

1. Indėlių augimas signalizuoja, jog žmonės ir verslas jaučiasi nestabiliai;
2. Dirbančių žmonių pajamos auga labiau nei bendra kainų infliacija, pensijos nėra mažinamos, tad žmonės turi daugiau pinigų;
3. Greitai augantis nedarbas gali signalizuoti nepakankamą valdžios paramą darbo vietoms išlaikyti.
4. Mažmeninė prekyba iki karantino spėjo pilnai atsigauti, tačiau tam tikros kategorijos neatsigavo ir veikiausiai artimoje ateityje neatsigaus – tai gali skatinti dar didesnį nedarbo augimą.
5. Panašu, kad Lietuva sugebės 2020 pabaigti geriausiu scenarijumi;
6. Kaip buvo prognozuota, Lietuvos ekonomikos atsigavimas veikiausiai bus V formos.

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VARTOTOJAI

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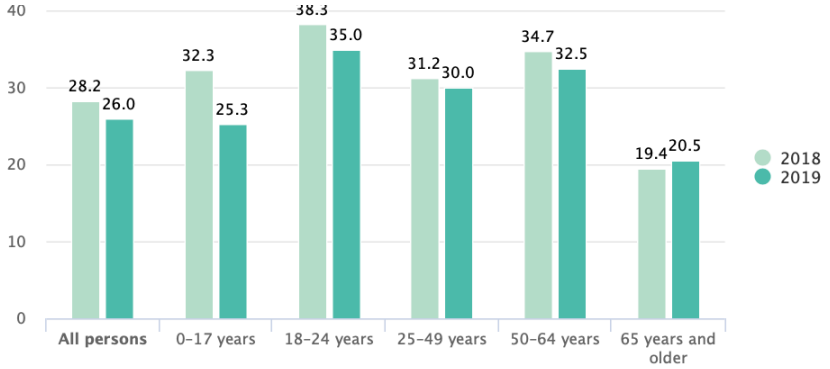
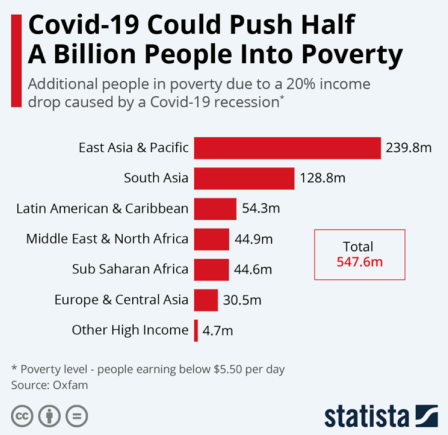
WORLD ECONOMIC FORUM

There's nothing new about the 'new normal'. Here's why

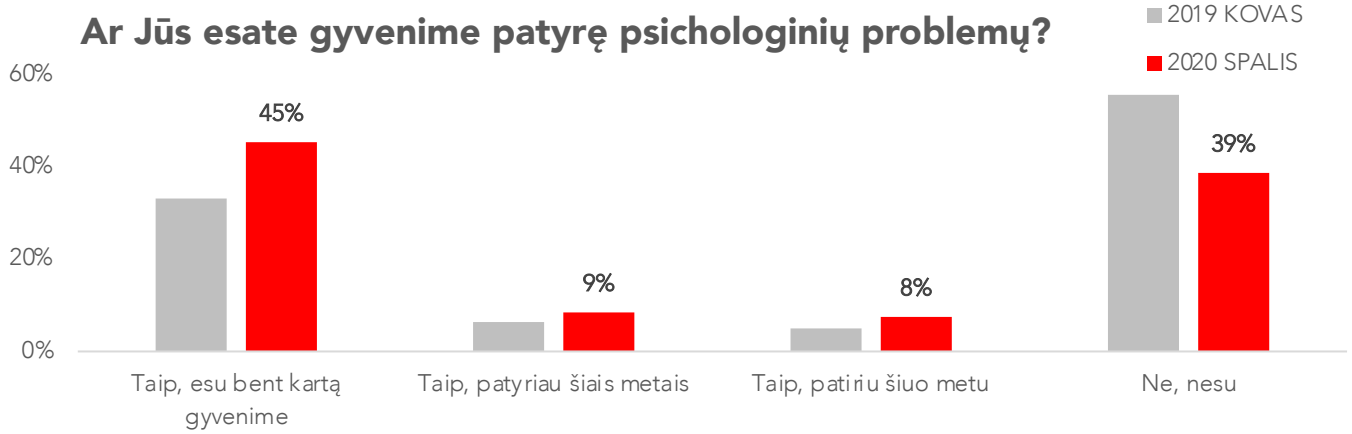
How much poverty is there really in Lithuania?

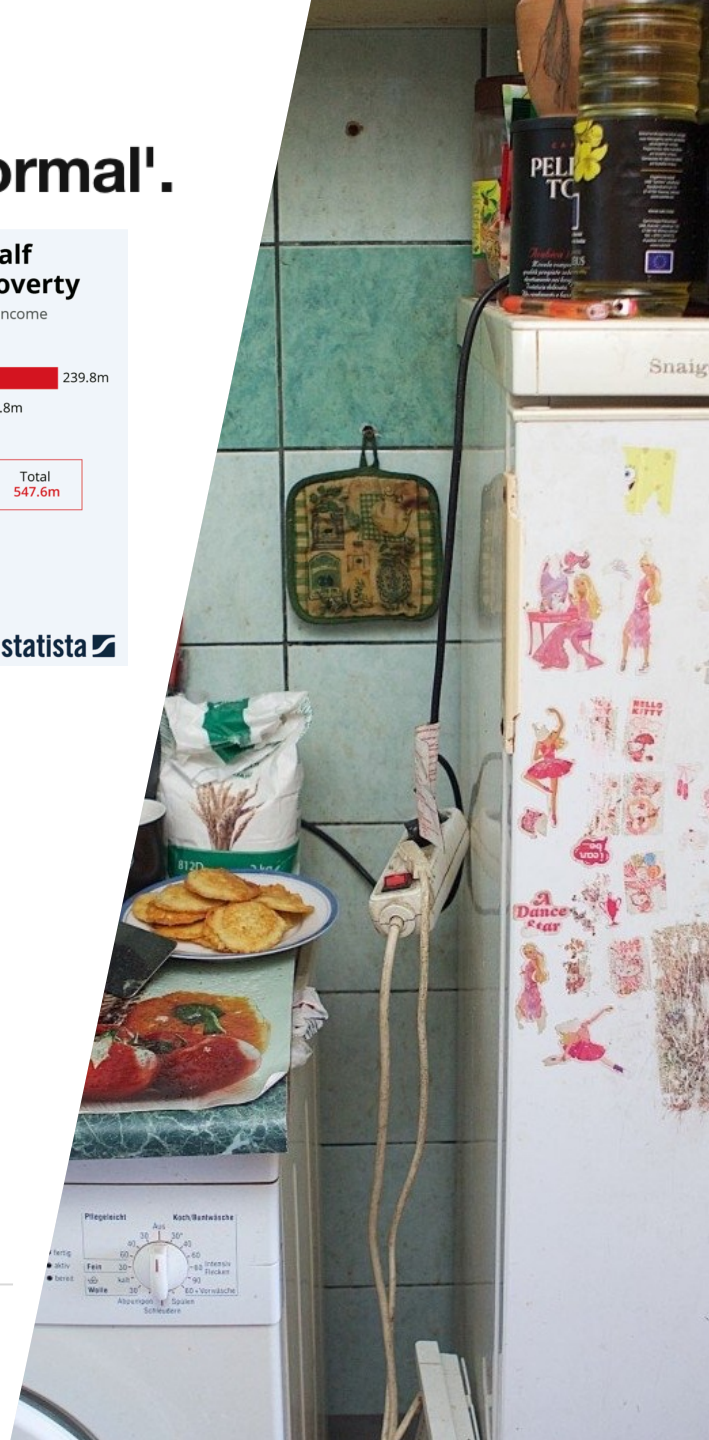
10





Ar Jūs esate gyvenime patyrę psichologinių problemų?

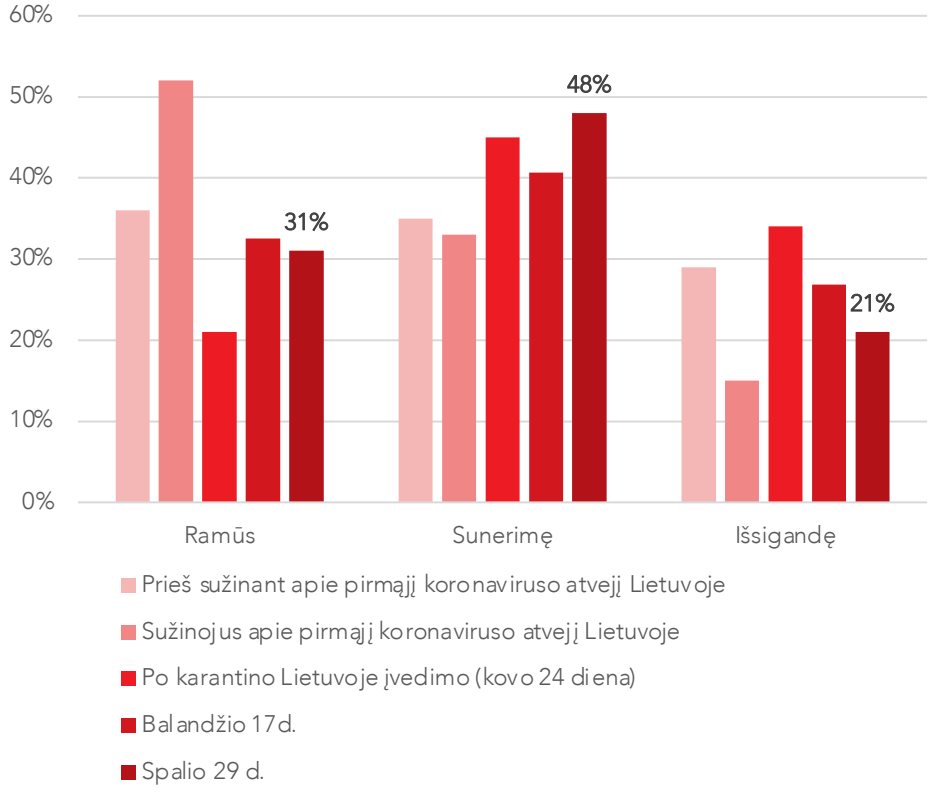


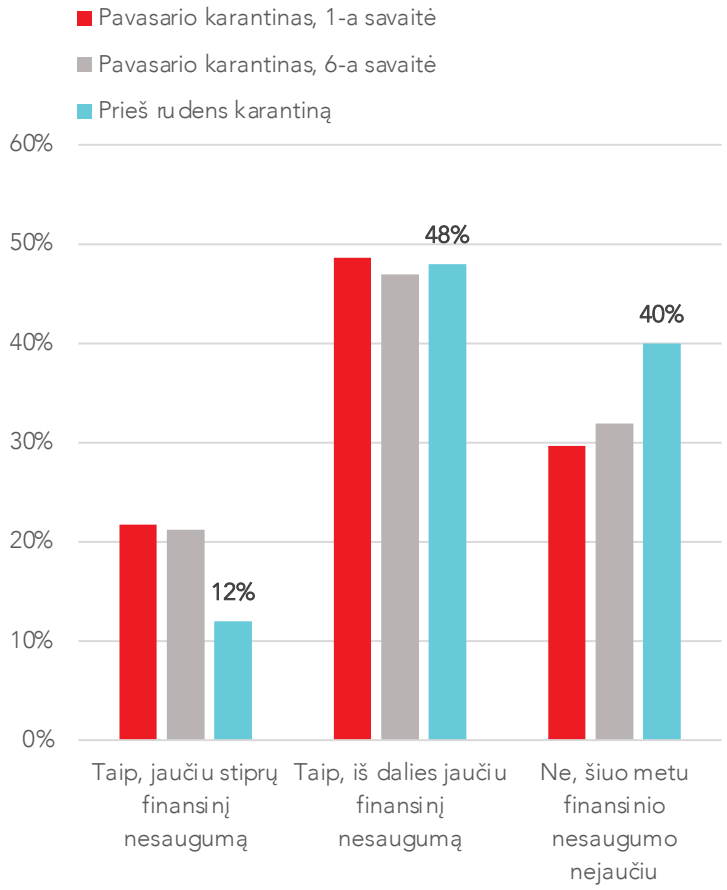


https://www.weforum.org/agenda/2020/06/theres-nothing-new-about-this-new-normal-heres-why/

1 MILIJONAS GYVENTOJŲ RAMŪS IR SAUGŪS

Susirūpinimas dėl bendros situacijos





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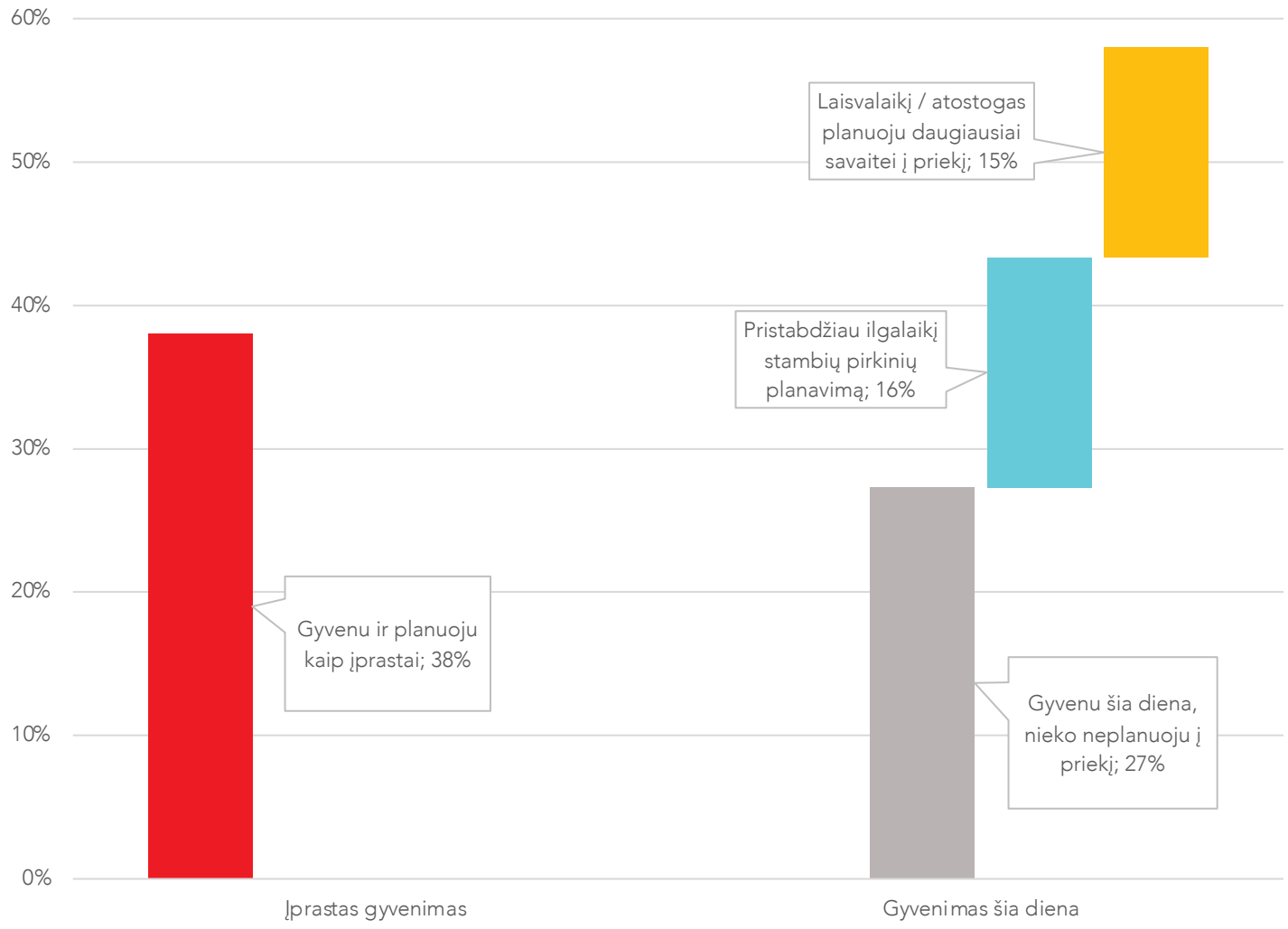
2/3 GYVENA ŠIA DIENA



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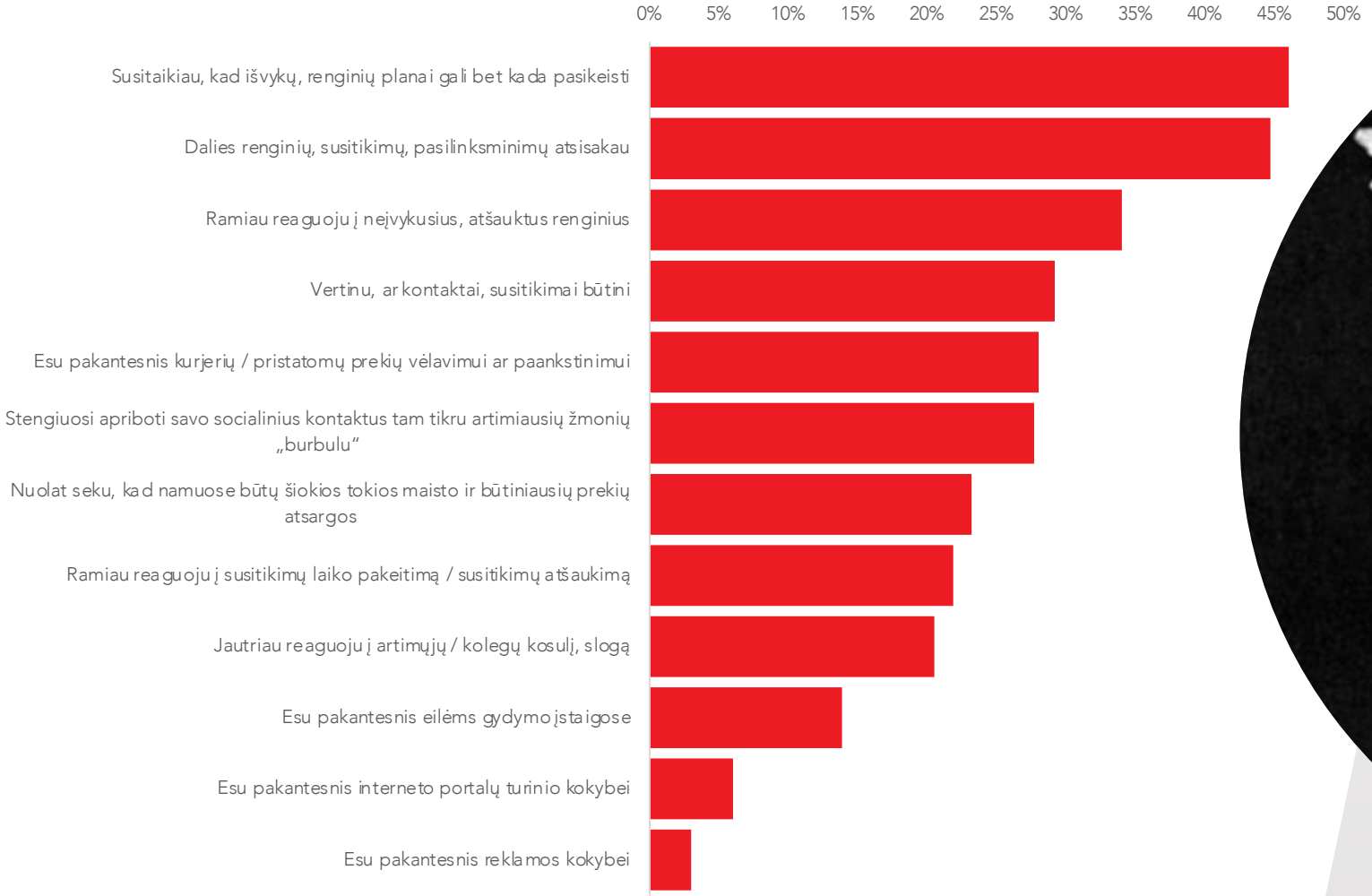
SUSITAIKYMAS IR LAUKIMAS

Ar per pandemiją pasikeitė Jūsų požiūris į tarnybas, paslaugas, žiniasklaidą?



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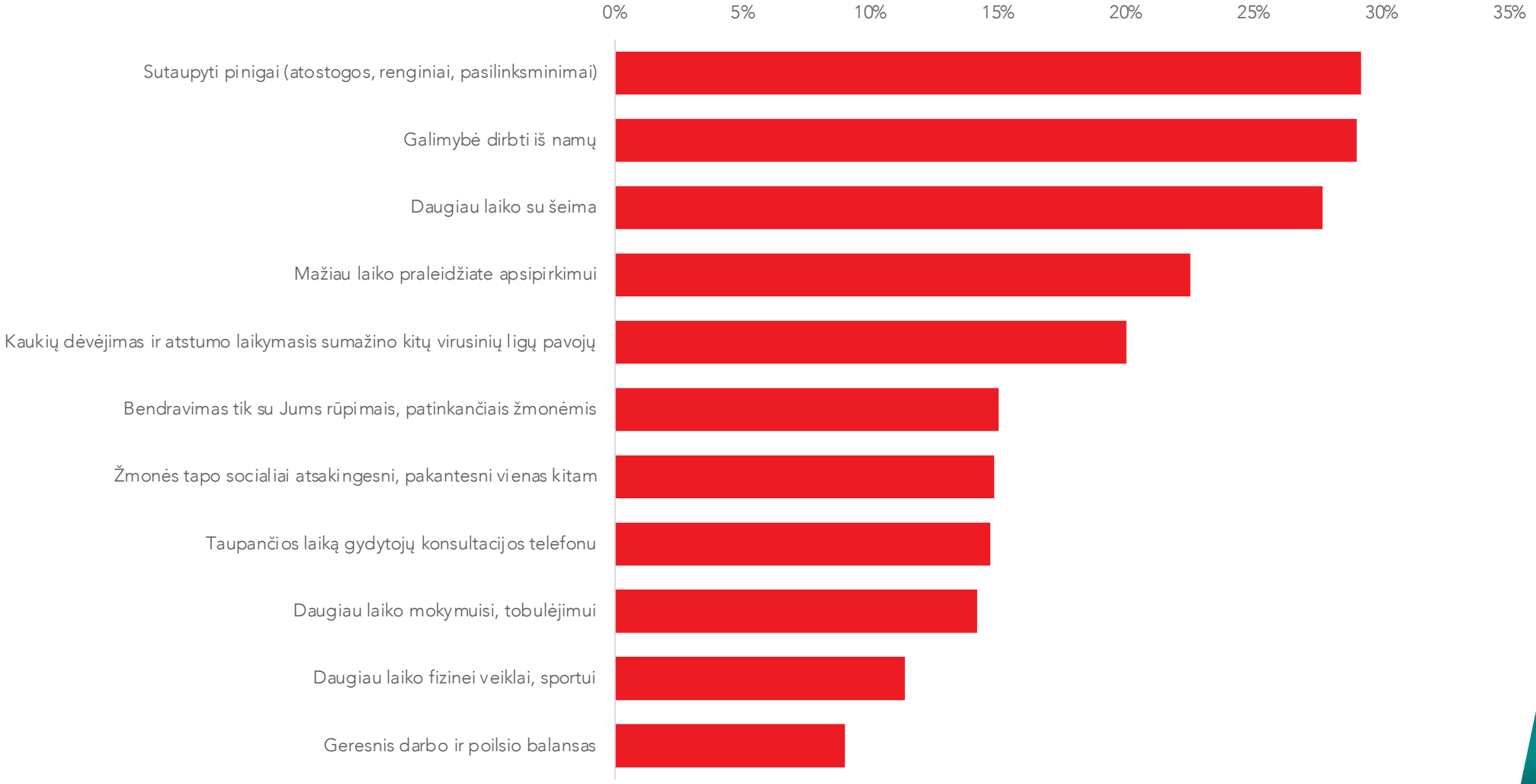
TEIGIAMA KARANTINO PUSĖ



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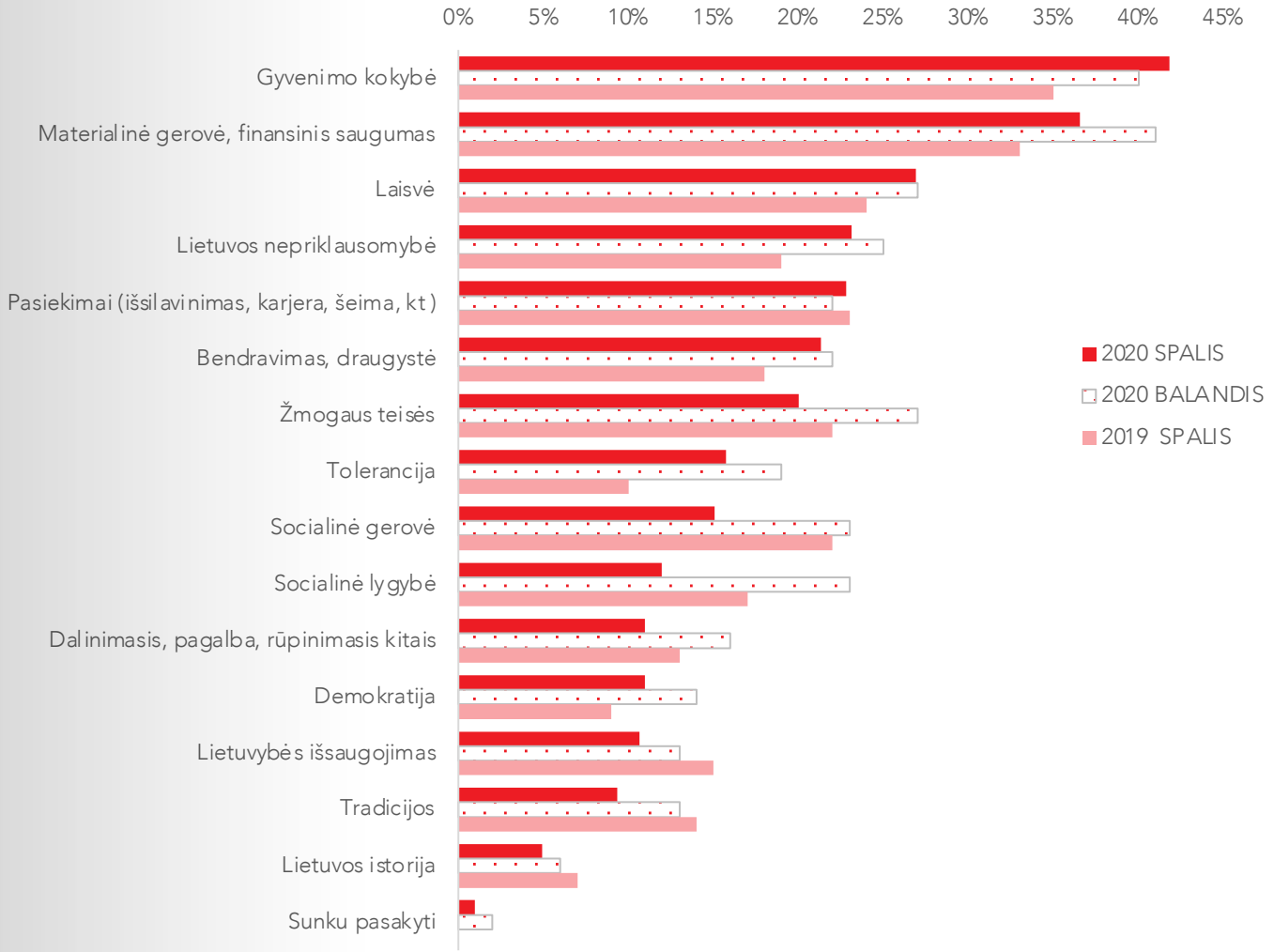
SOLIDARUMAS GERAI, BET VISŲ PIRMĄ – GERAS GYVENIMAS



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GYVENIMAS TARP BANGŲ

Work

Rise of unemployment
On-the-go consumption
Remote working

*"**20x** increase in Zoom daily participants"*

Source: Bond Capital

Learning

Spend on learning adjacencies
Remote learning

*"~**35%** of Netflix subscribers use it for educational content"*

Source: YouGov

Communications and information

In-person sampling decline
Shift in media consumption

Further migration to digital

Travel and mobility

Reduction in tourist spend and travel retail
Increase in domestic tourism

*"**80%** reduction in international travel and related tourist spend"*

Source: McKinsey analysis in partnership with Oxford Economics

Shopping and consumption

Surge in e-commerce
Preference for trusted brands
Decline in discretionary spend, trading down
Larger basket, reduced shopping frequency
Shift to stores closer to home
Polarization of sustainability

"Personal disposable income is not expected to recover to pre-crisis level until Q2 2024 in the US"

Source: McKinsey analysis in partnership with Oxford Economics

Life at home

Nesting at home
Surge in online

Home is recast as the new coffee shop, restaurant and entertainment center

Play and entertainment

Preference for digital entertainment
Entertainment channel shift (eg, cinema to streaming)
Additional play time

"Disney+ achieved in 5 months what took 7 years for Netflix"

Source: PhoneArena

Health and well-being

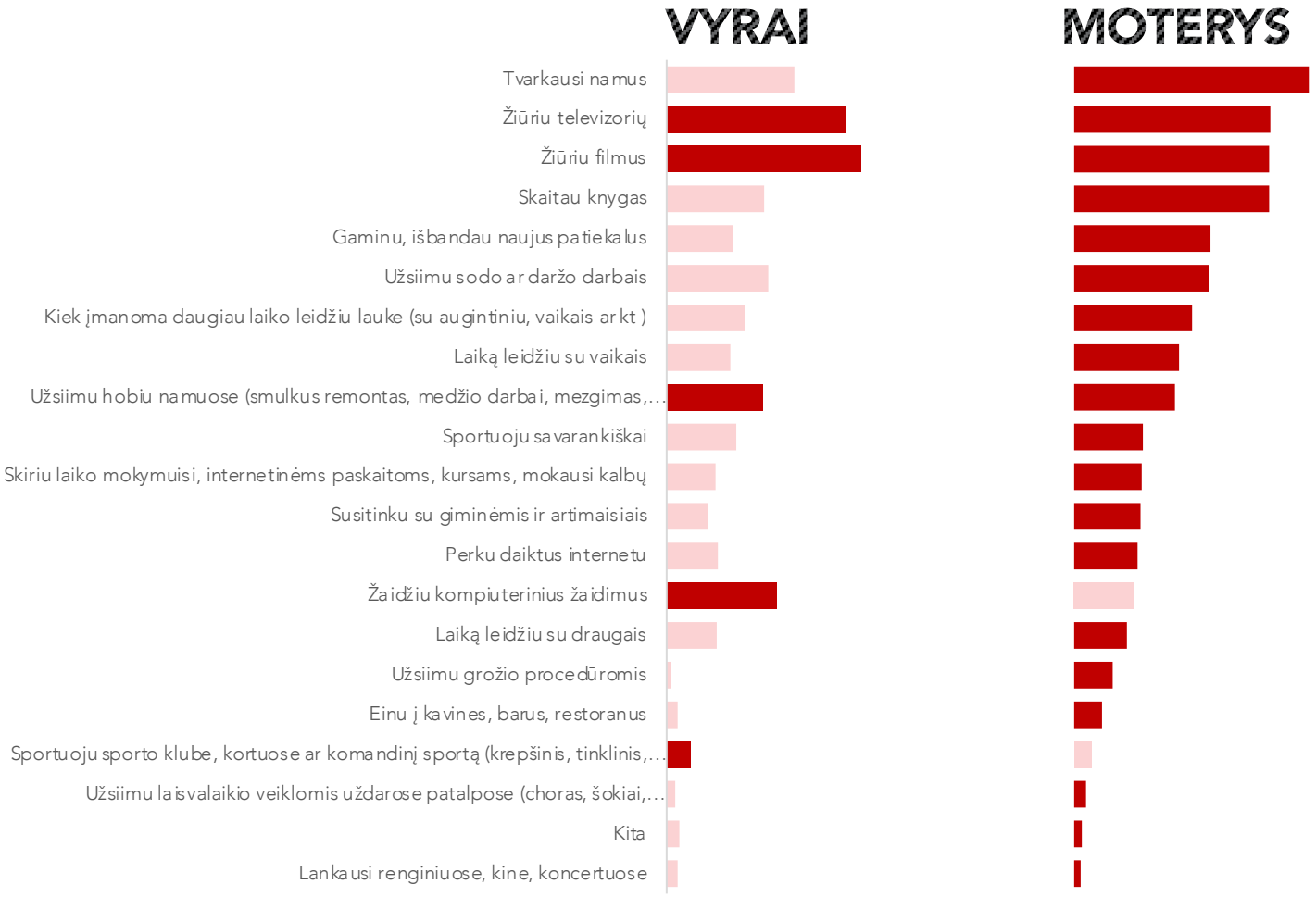
Focus on health and hygiene
Acceleration of organic, natural, fresh
Fitness on-demand
E-pharmacy and e-doctor at scale

"Monthly year-over-year growth of organic produce in the US increased by 10x in March compared with January and February"

Source: Organic Produce Network

© Inspired UM 2020 | Data: https://www.mckinsey.com/about-us/covid-response-center/leadership-mindsets/webinars/evolving-consumer-how-covid-19-has-changed-us-shopping-habits

KĄ ŽMONĖS VEIKIA VISĄ DIENĄ



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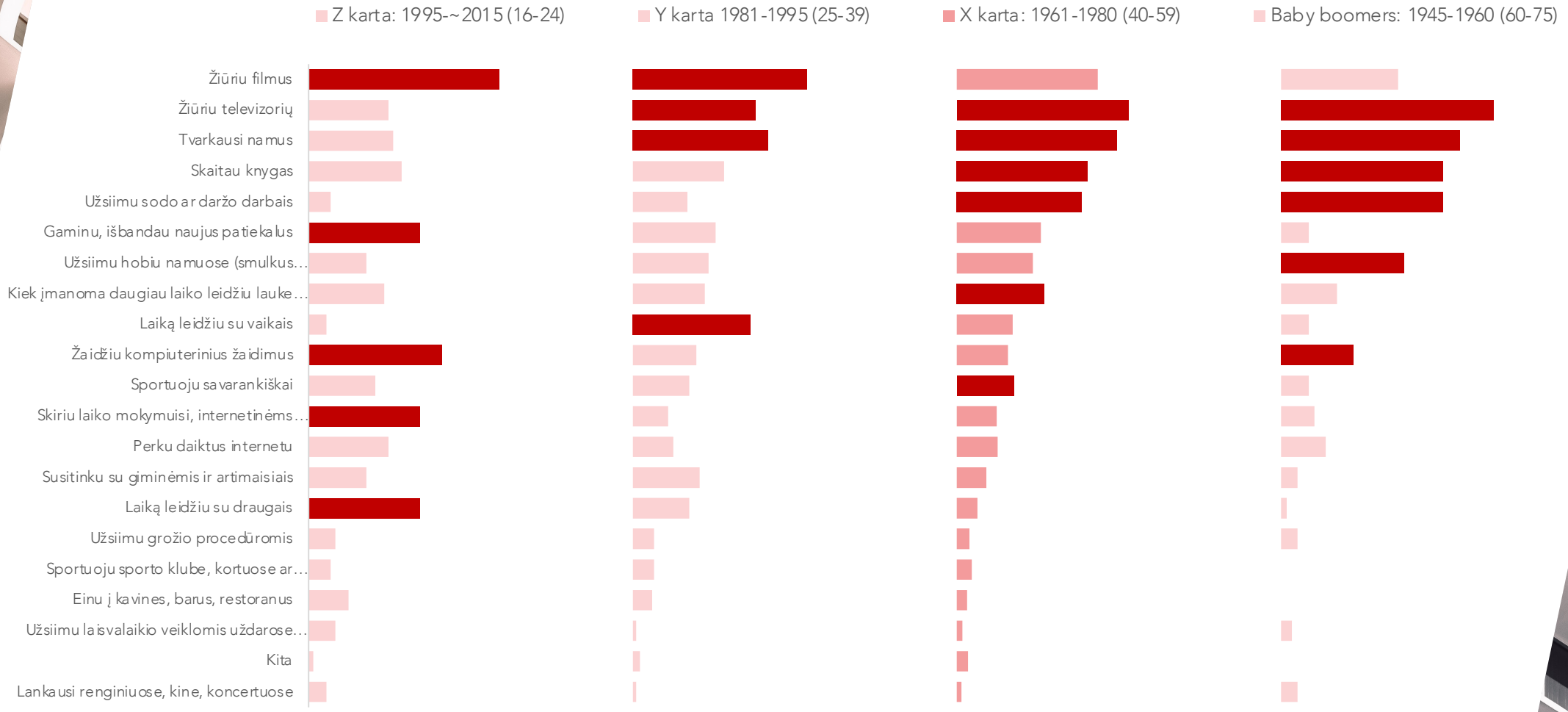
KĄ ŽMONĖS VEIKIA VISĄ DIENĄ



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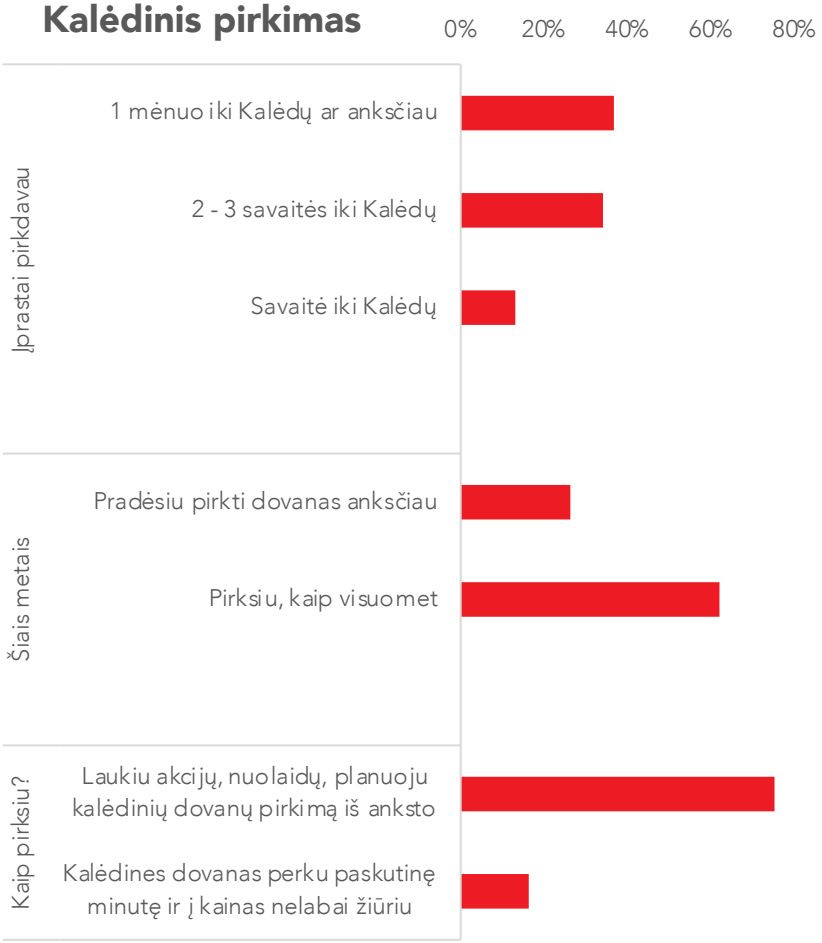
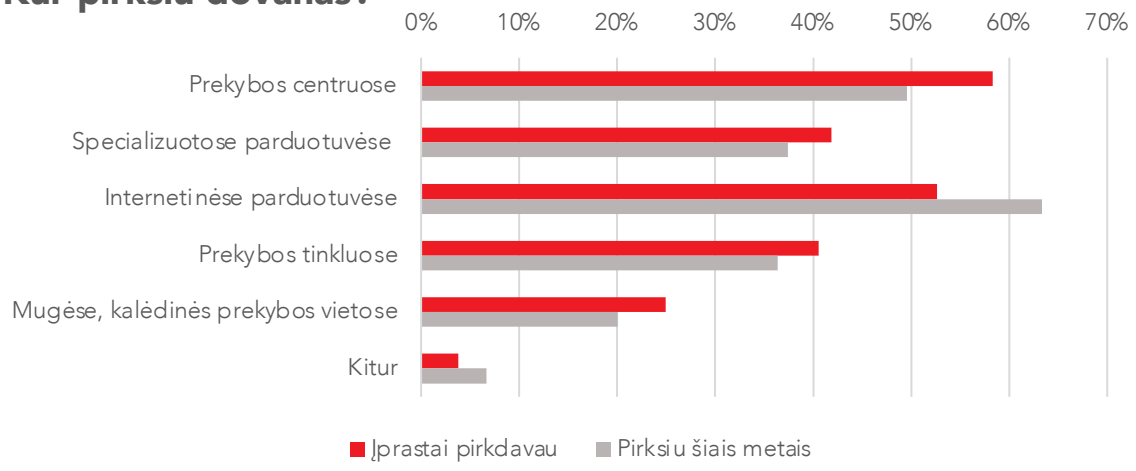
NE TIK E-KALĖDOS

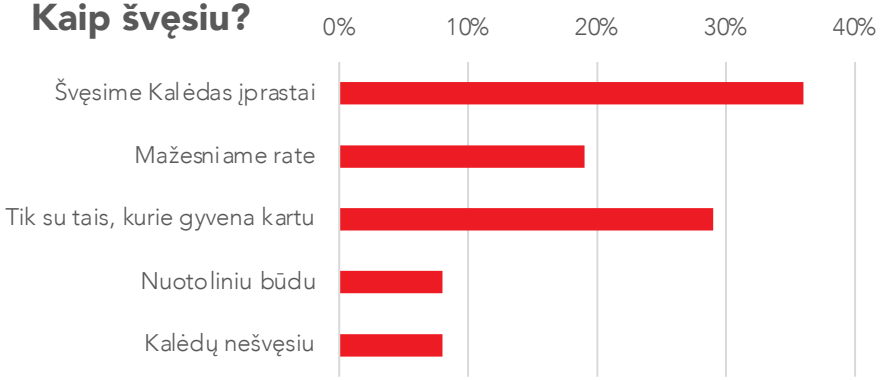
Kalėdinis pirkimas



Kur pirksiu dovanas?



Kaip švęsiu?



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SANTRAUKA

1. DIDŽIAUSIOS PERKAMOSIOS GALIOS GRUPĖ GYVENA GAN ĮPRASTĄ GYVENIMĄ.
2. TOLIMESNĖ PERSPEKTYVA ATRODO GERA, TAČIAU TRUMPUOJU PERIODU "MIGLOTA" IR VYRAUJA GYVENIMAS ŠIA DIENA.
3. ŽMONĖS TAPO PAKANTESNI.
4. GYVENIMAS VYKSTA BANGOMIS. PREKĖS ŽENKLAI TURI NAUDOTIS BANGOMIS SUSTIPRINTI SAVO POZICIJAS.
5. AR ATSIRAS REIKŠMINGI NAUJI ILGALAIKIAI ĮPROČIAI MATYSIME TIK KITŲ METŲ PABAIGOJE.
6. KALĖDOS BUS. DĖL „NATŪRALIŲ" PRIEŽASČIŲ ŠIEK TIEK MAŽESNĖS.

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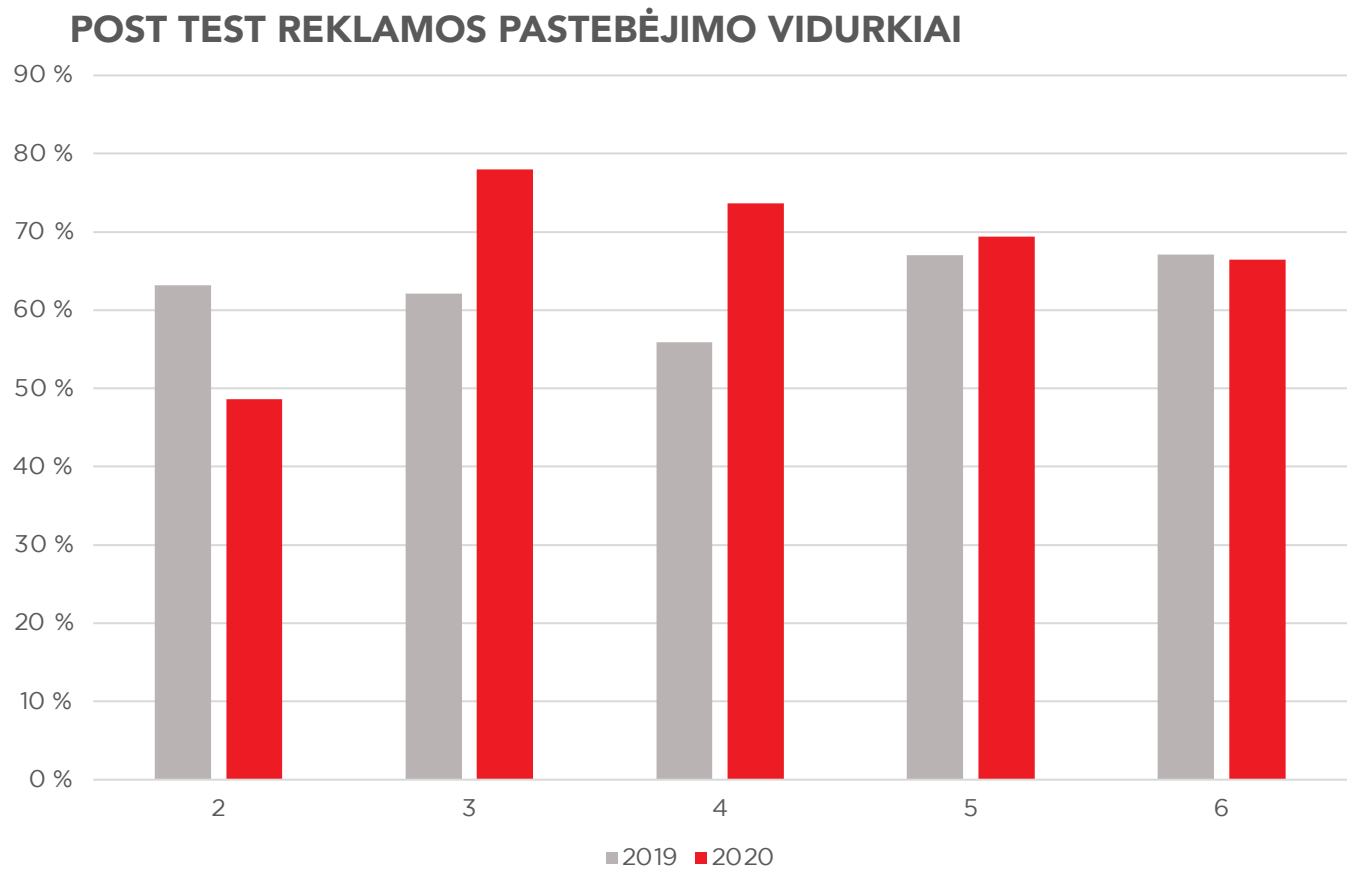
PAMOKOS. REKLAMA MATOMA IR AKTUALI



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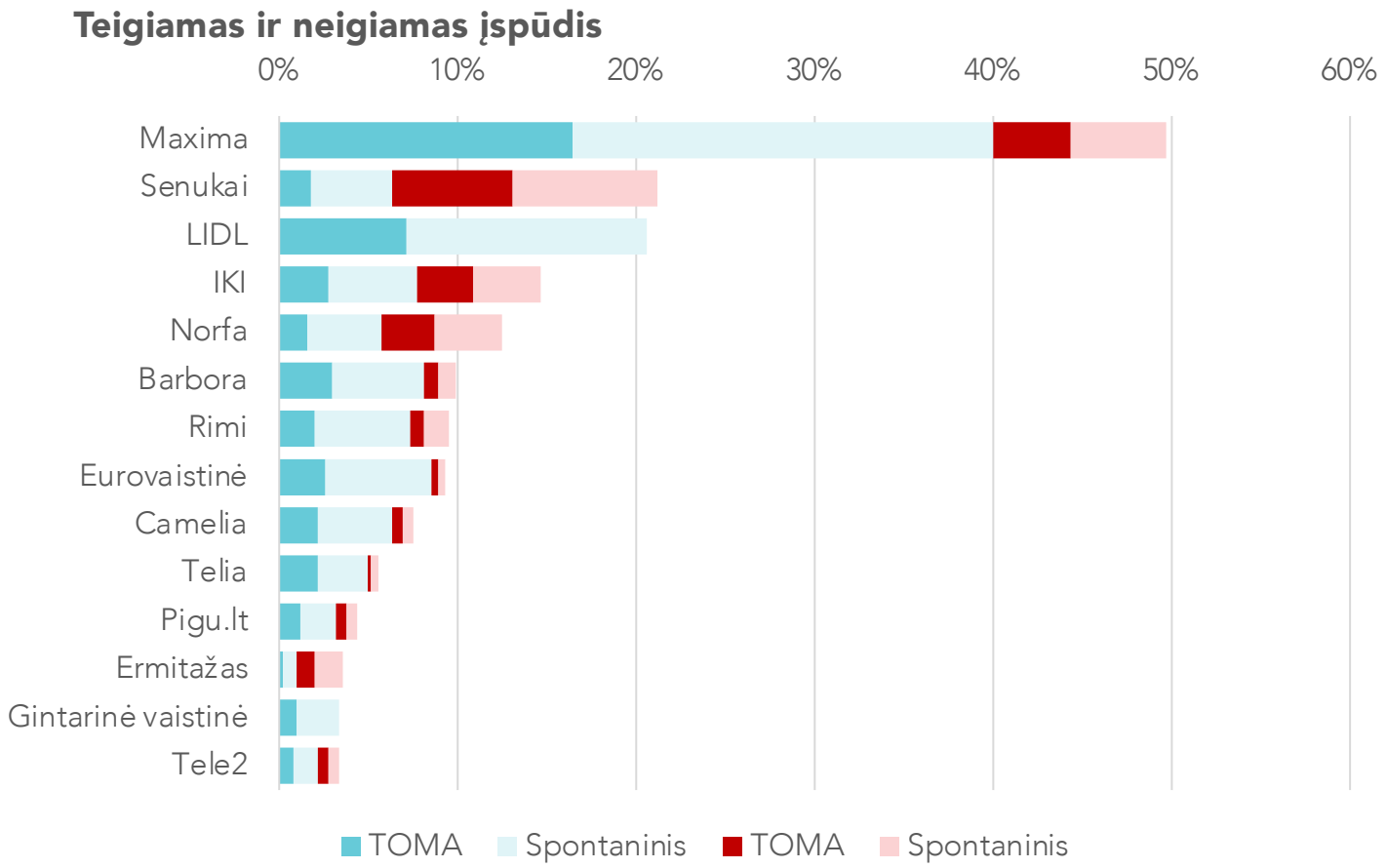
PAMOKOS. EMPATIŠKA KOMUNIKACIJA ATSIPERKA



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SOLIDARUMO BANGA

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BURGER KING

ORDER FROM MCDONALD'S.

We never thought we'd be asking you to do this. Just like we never thought we'd be encouraging you to order from KFC, Subway, Domino's Pizza, Pizza Hut, Five Guys, Greggs, Taco Bell, Papa John's, Leon… or any of the other independent food outlets, too numerous to mention here. In short, from any of our sister food chains (fast or not so fast).

We never thought we'd be asking you to do this, but restaurants employing thousands of staff really need your support at the moment.

So, if you want to help, keep treating yourself to tasty meals through home delivery, takeaway or drive thru. Getting a Whopper is always best, but ordering a Big Mac is also not such a bad thing.

Take care,
Team Burger King UK

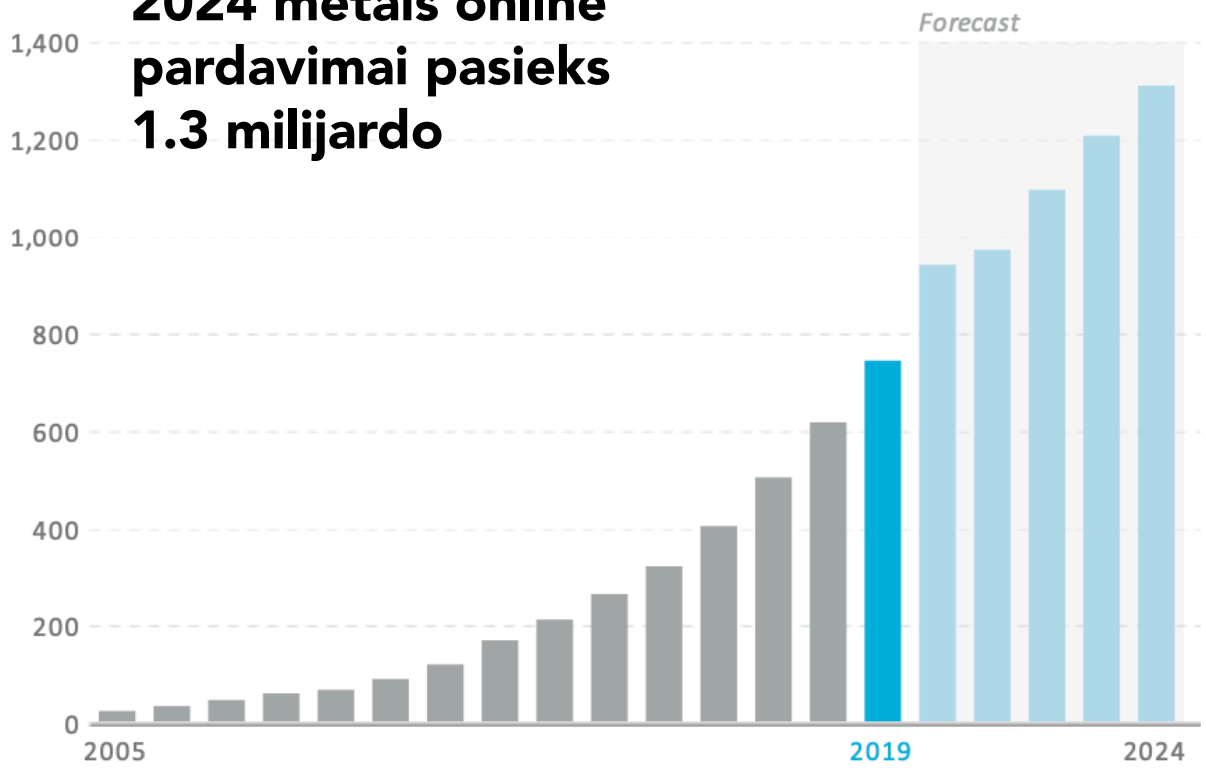
PAMOKOS.
54% TAUTOS PERKA INTERNETU

Sales of E-Commerce

Retail Value RSP excl Sales Tax - EUR million - Current - 2005-2024

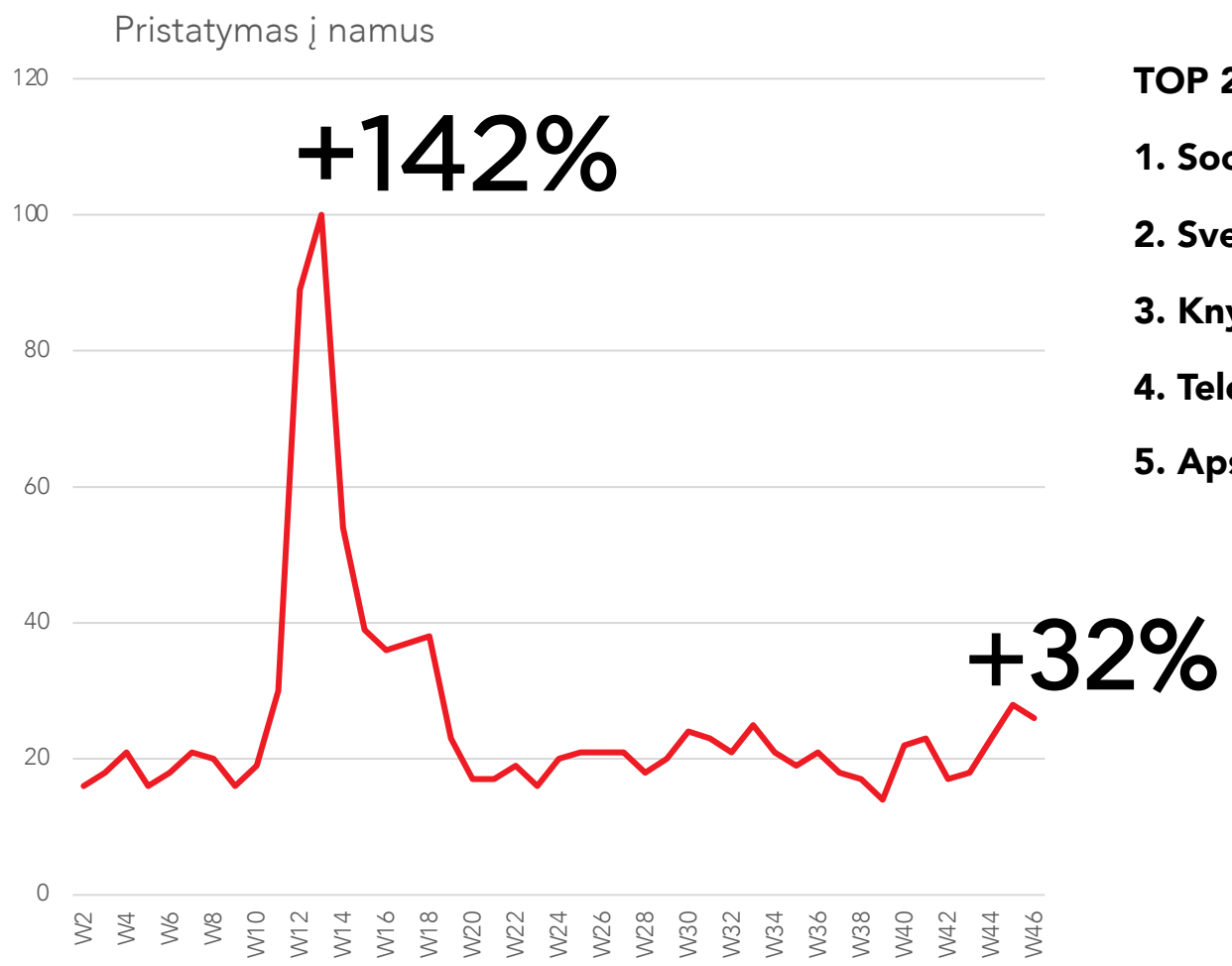
741

2024 metais online pardavimai pasieks 1.3 milijardo



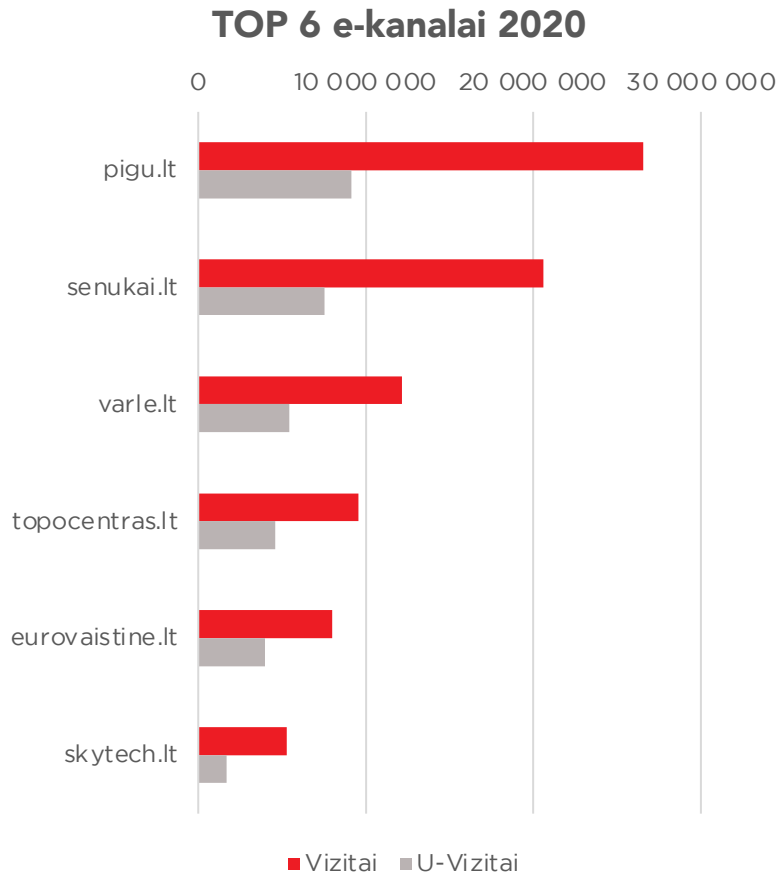
© Inspired UM 2020 | Euromonitor: Internet retailing in Lithuania – datagraphics, Lithuanian Department of Statistics data

KARANTINAS TENDENCIJĄ PASPARTINO



TOP 2020 paieškos:

1. **Socialiniai tinklai**
2. **Sveikata**
3. **Knygos**
4. **Telekomunikacijos**
5. **Apsipirkinėjimas**



BALANDIS – ANTROS KALĖDOS

VERSLO ŽINIOS > RINKODARA

PREMIUM

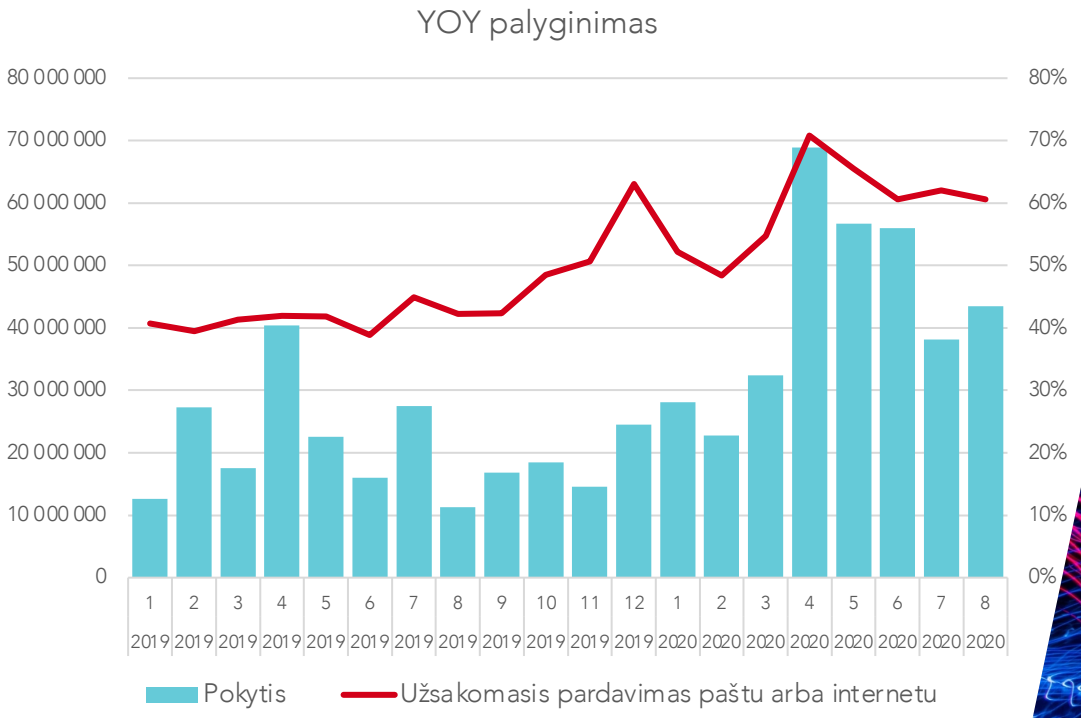
Konkurencija e. prekyboje: biudžetai auga kartais, „Pigu“ nebedominuoja

Publikuota: 2020-11-11

Rūta Balčiūnienė
„Verslo žinios“

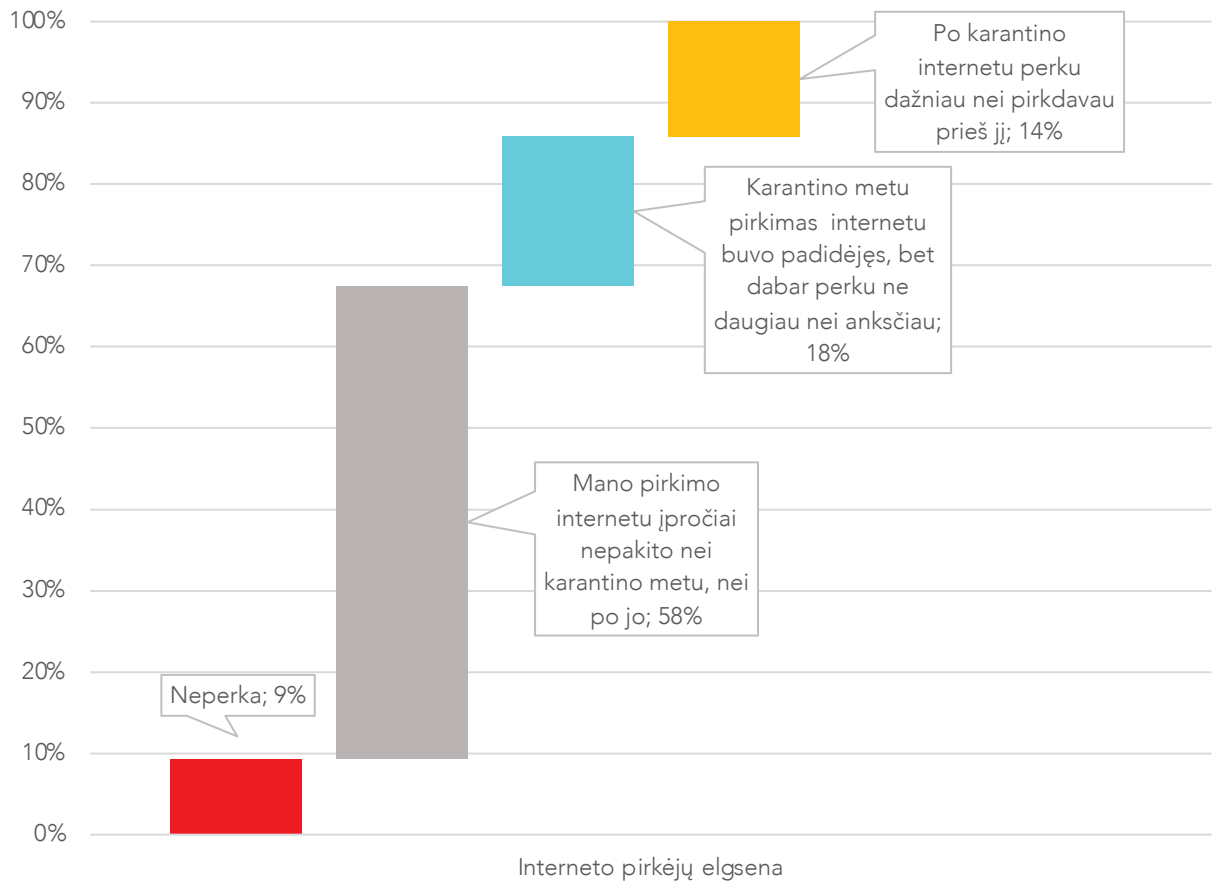
Rašyti komentarą 0

- „Pigu.lt“ komunikacijos biudžetai tradicinėje medijoje šiek tiek sumenko, bet ji išlaiko pirmaujančias pozicijas.
- Kitų e. prekybininkų rinkodaros biudžetai šiemet augo kartais.
- „AboutYou.lt“ atsistojo į ketvirtą vietą.
- Naujokai šioje kategorijoje ir „Ermitažas.lt“, „Vinted.lt“ bei „Ikea.lt“.
- Yra pasiruošę aptarnauti reikšmingai augančius srautus e. prekyboje.



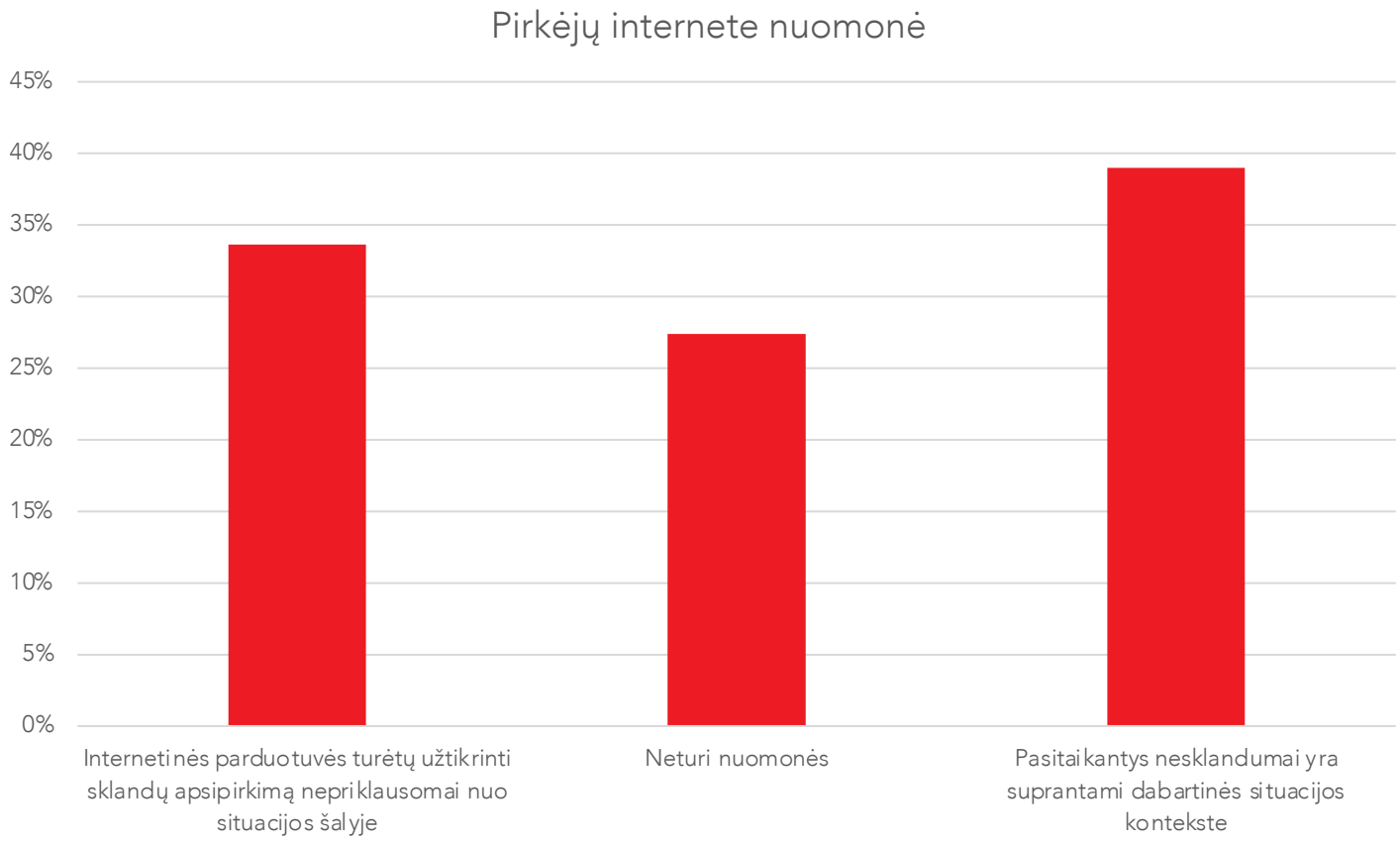
© Inspired UM 2020 | Data:

E-KOMERCIJA GAVO 14% NAUJŲ PIRKĖJŲ



© Inspired UM 2020 | Data: KOG Covid19 tracker, 2020 03 – 10, n=600

NORS ŽMONĖS PAKANTESNI, TAI NEREIŠKIA, KAD JUOS GALIMA PRASČIAU APTARNAUTI



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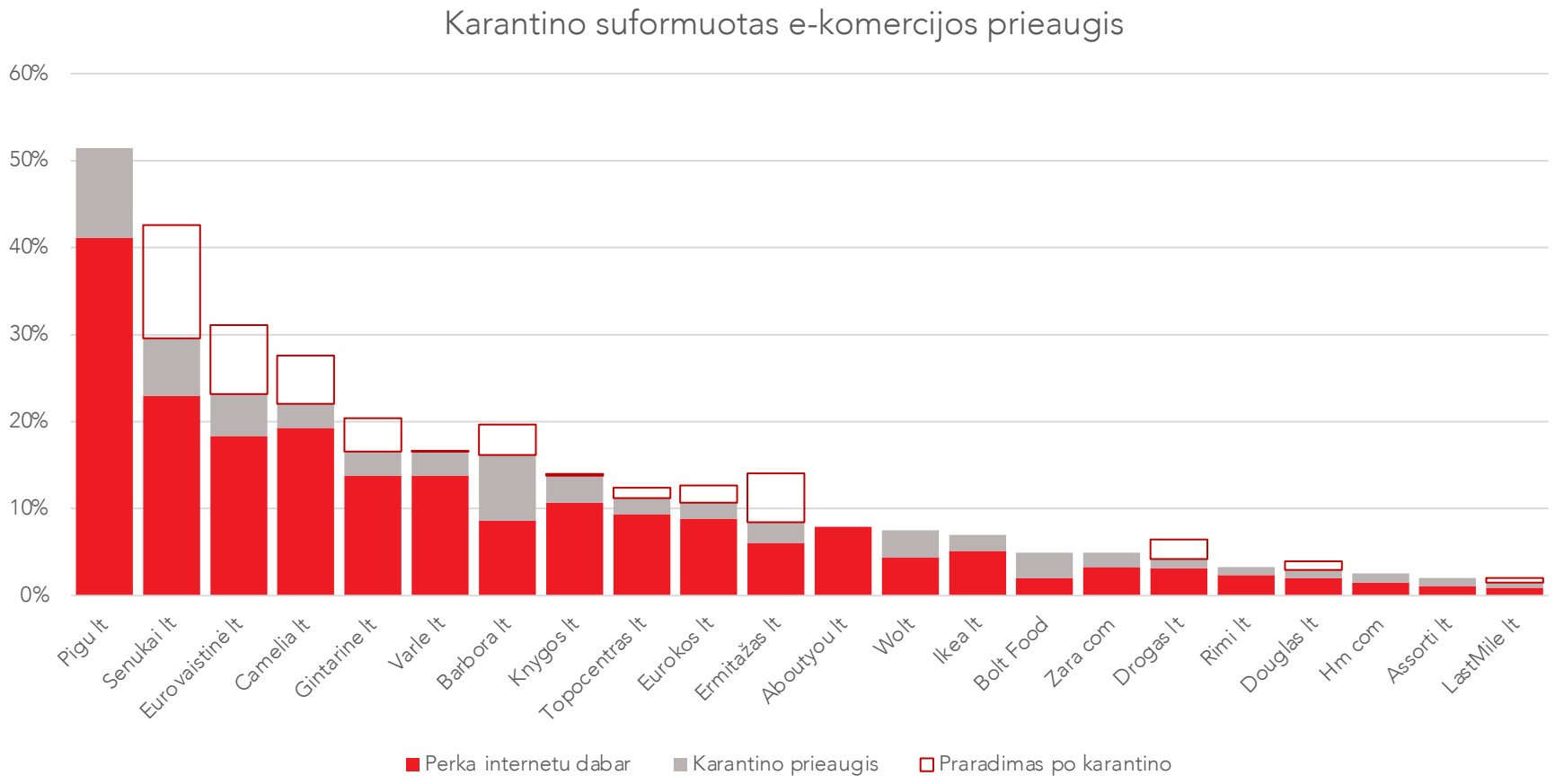
IR NE VISI PREKĖS ŽENKLAI TAI SUPRATO



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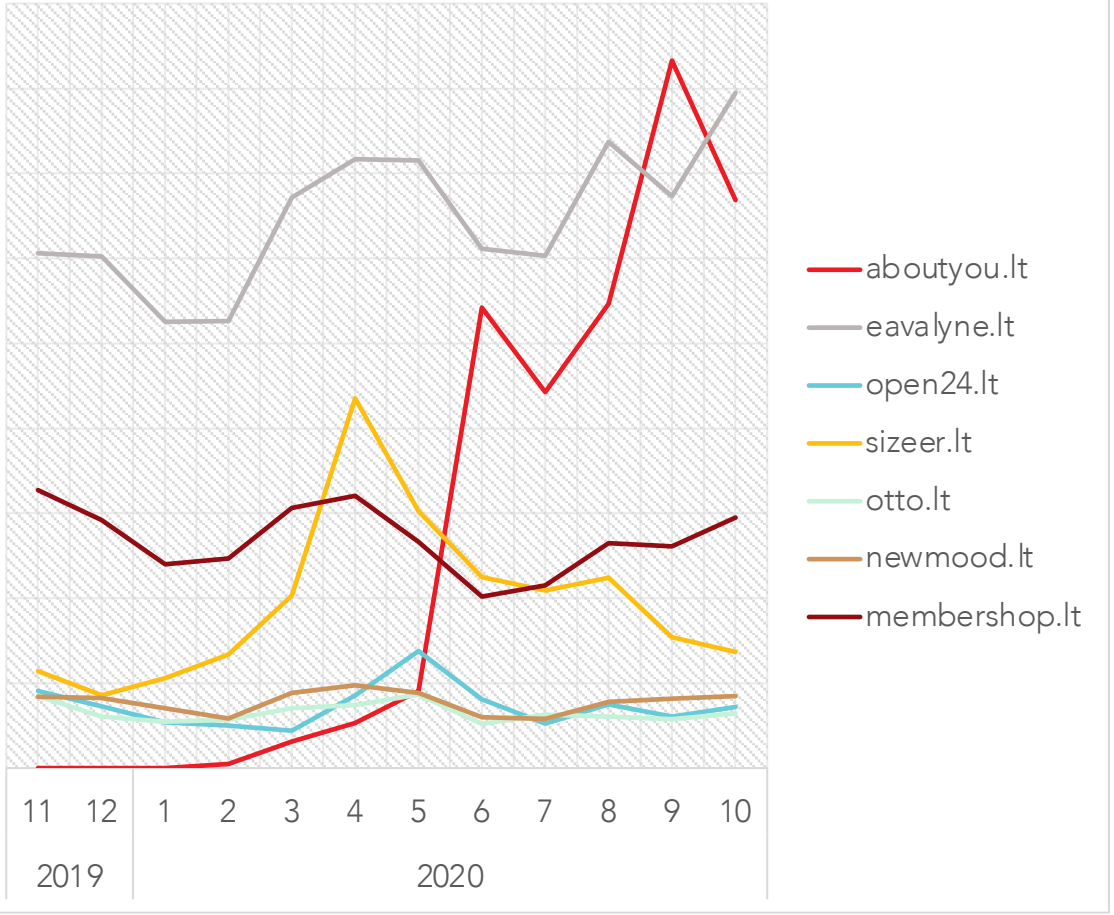
PAMOKOS.
GALIMYBĖ NAUJIEMS ŽENKLAMS

4

ABOUT YOU



© Inspired UM 2020 | Euromonitor: Internet retailing in Lithuania – datagraphics, Lithuanian Department of Statistics data

SANTRAUKA

2020

1. Kalėdoms galimai žmonės išleis mažiau pinigų nei 2019
    - Nebus rengiami įmonių vakarėliai;
    - Nebus viešų renginių / pramogų;
    - Žmonės lankys mažiau žmonių, atitinkamai mažiau bus perkama dovanų;
    - Veikiausiai Kalėdos geriausios bus/jau yra el-prekybai;
    - Sunkesnės Kalėdos bus prekybos centrams.

2021

1. Pirmą ketvirtį Covid situacija gali būti prasta;
2. Kita vertus, nežinomybės bus daug mažiau
    - Žmonės jau žino kaip persijunginėti iš vieno gyvenimo režimo į kitą;
3. E-komercija vėl turėtų augti;
4. TV/Online vartojimas išaugs ir bus gera proga įvaizdinei komunikacijai;
5. Pavasarį nuotaikos stipriai gerės sulig pirmomis vakcinomis ir natūraliai blėstančiu virusu;
6. Vartojimas turėtų pradėti sparčiai augti (žmonės bus neišleidę lėšų nei per šventes nei per karantiną);
7. Manome, kad vasarą nemažai žmonių gali atostogauti ne Lietuvoje (priklausys nuo vakcinavimo greičio);
8. Galimai vartotojų pasitikėjimo indeksas bus aukščiausias per pastaruosius 10 metų.

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REKLAMOS RINKA

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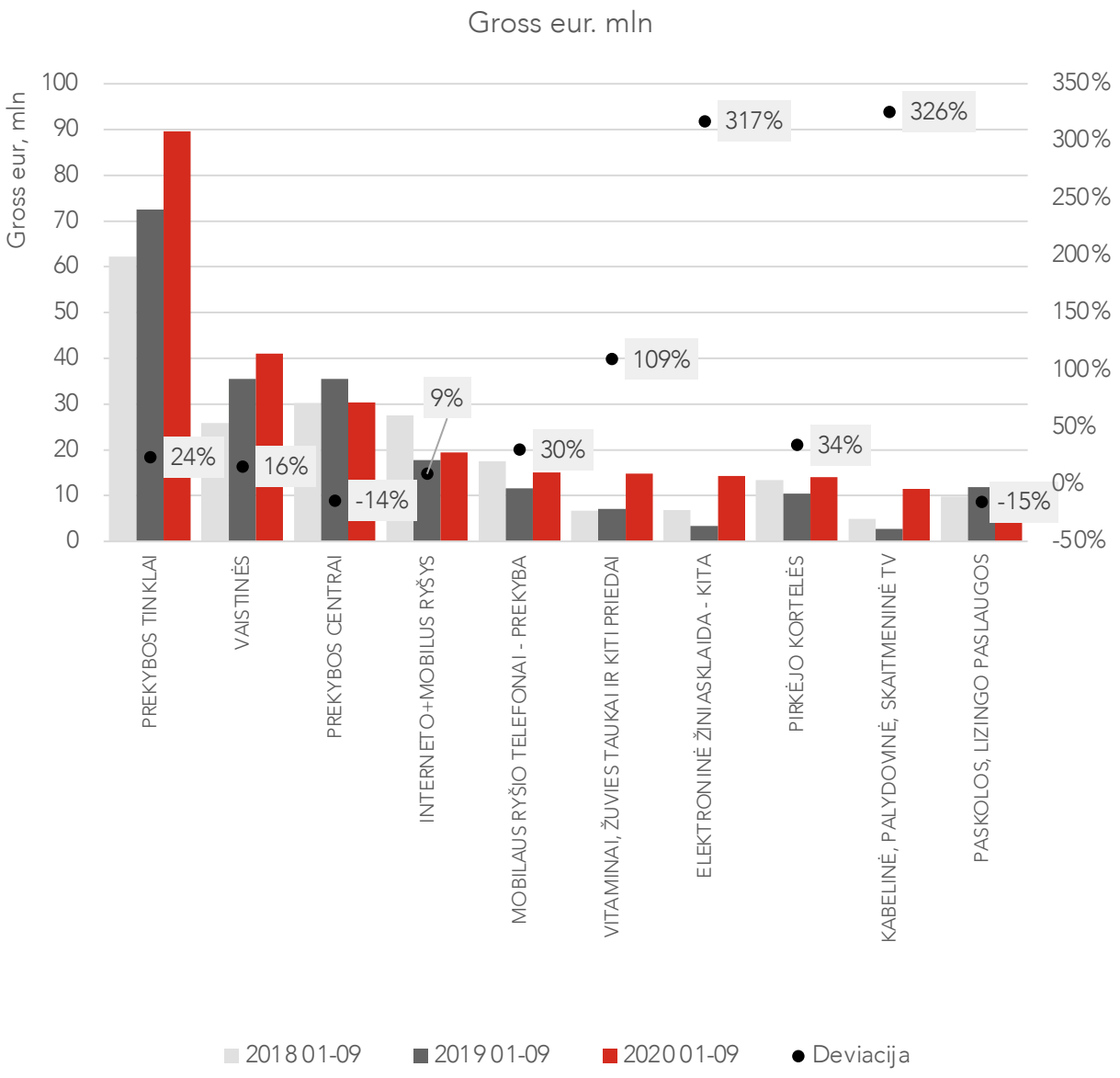
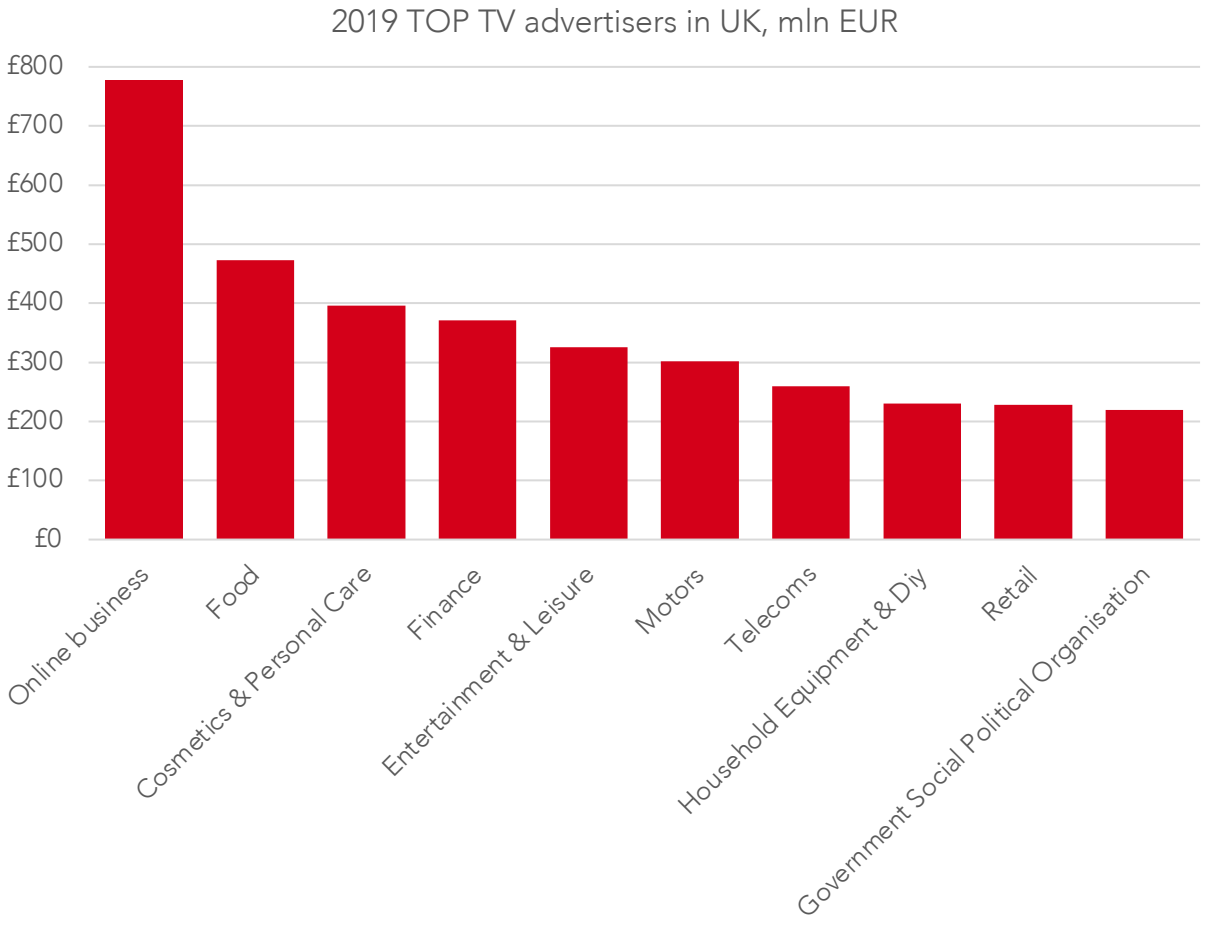
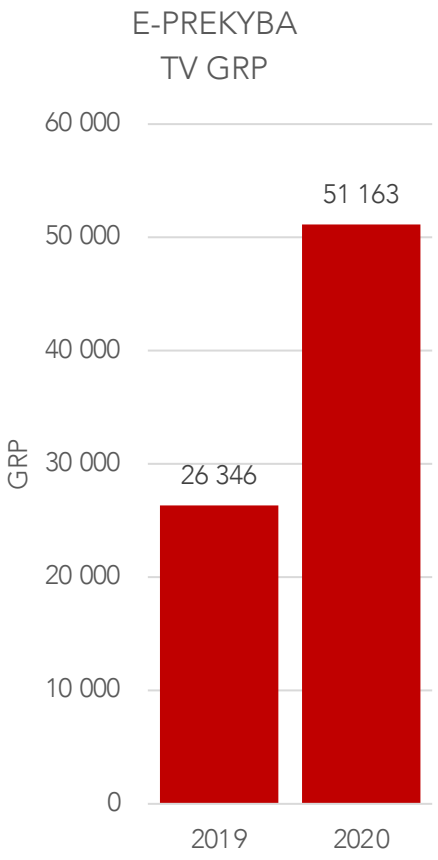
TOP PRODUKTŲ GRUPĖS 2018-2020 M. 1-9 MĖN.

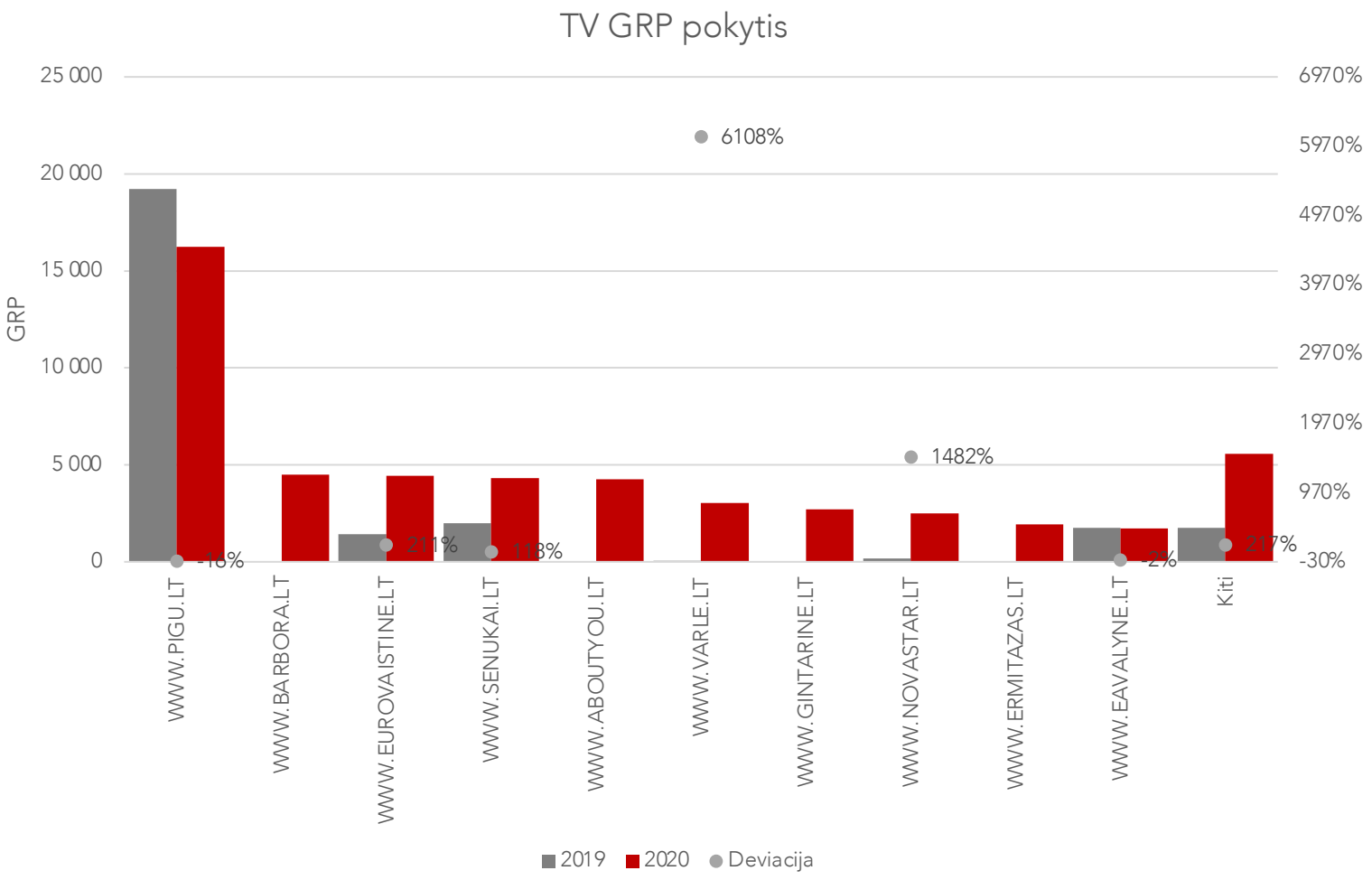




© Inspired UM 2020 | TNS LT; Source: Nielsen, 2019 'Online business' is a Thinkbox-created category which consists of all online-only brands and online services for bricks and mortar businesses.

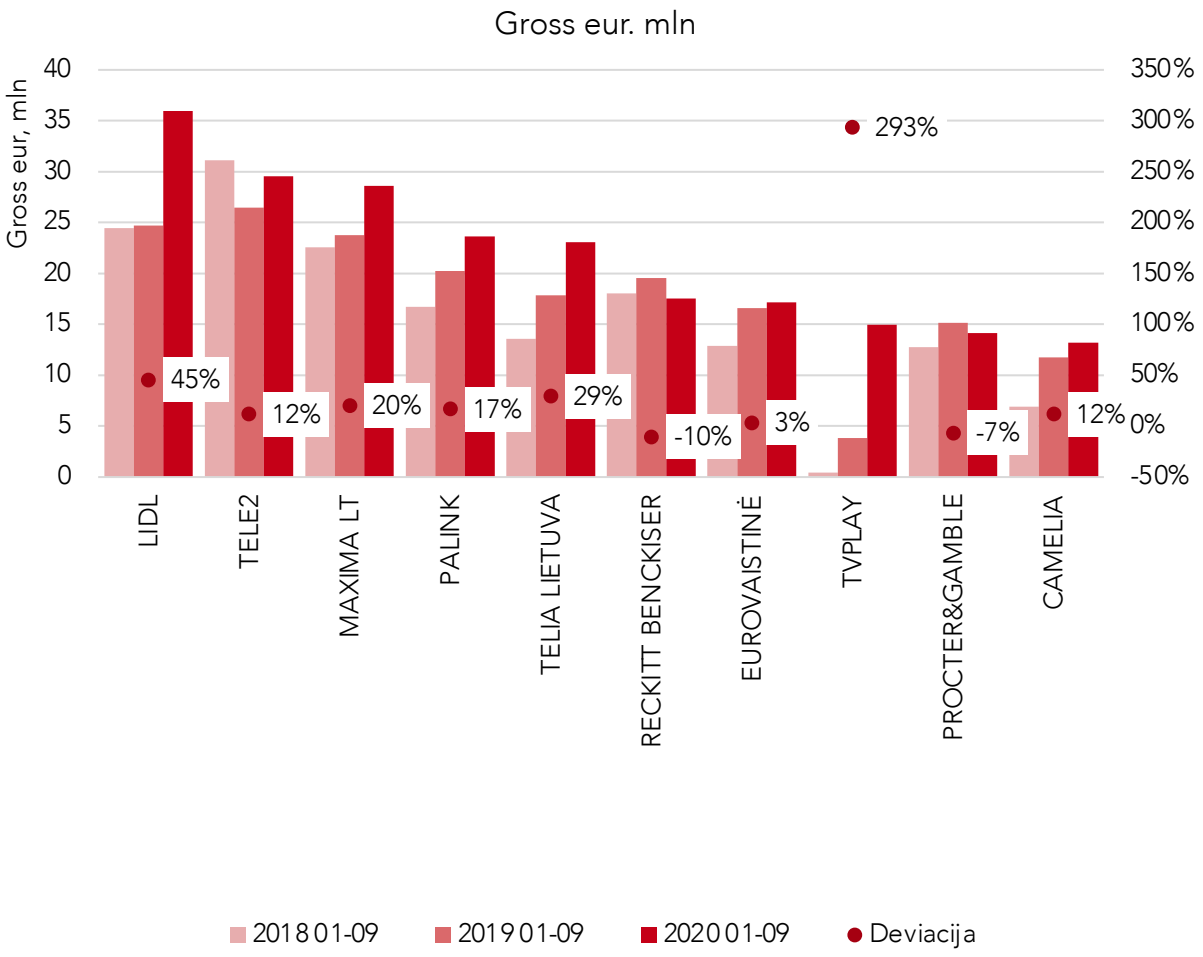
E-PREKYBA 2019-2020 M. 1-10 MĖN. TV GRP



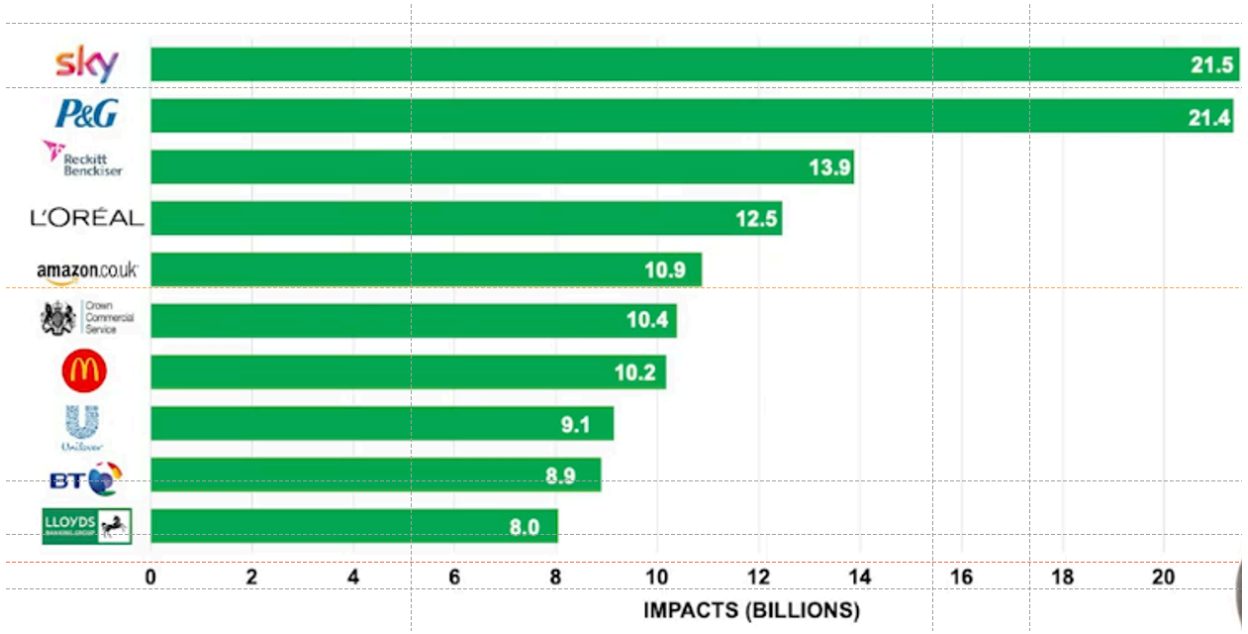


© Inspired UM 2020 | Kantar

Reklamuotojai 2018-2020 m. 1-9 mėn.



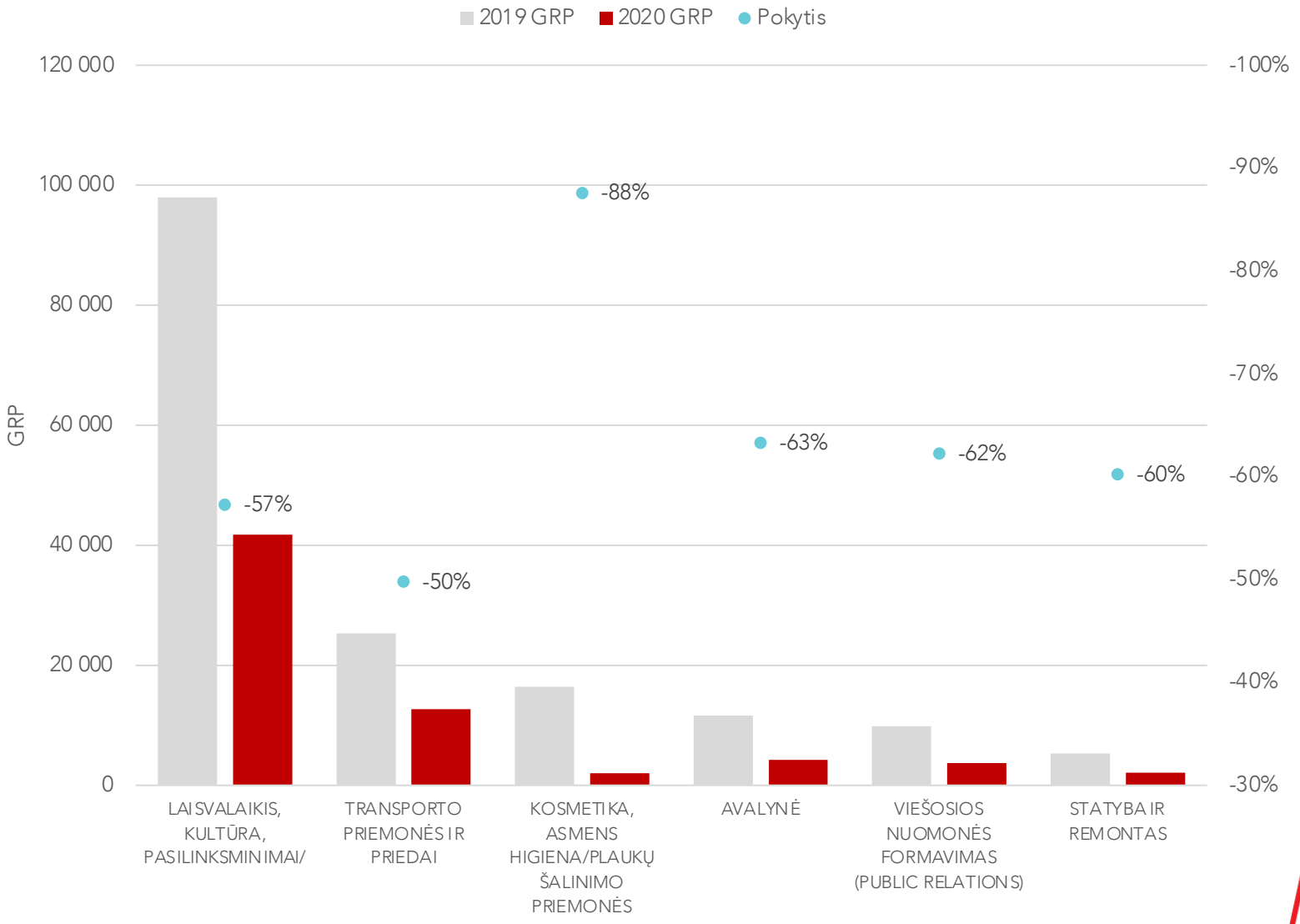
TOP UK Advertisers on TV



inspired UM

© Inspired UM 2020 | TNS LT; Source: Nielsen, 2019 'Online business' is a Thinkbox-created category which consists of all online-only brands and online services for bricks and mortar businesses.

LABIAUSIAI REKLAMOS KIEKIUS MAŽINĘ SEKTORIAI



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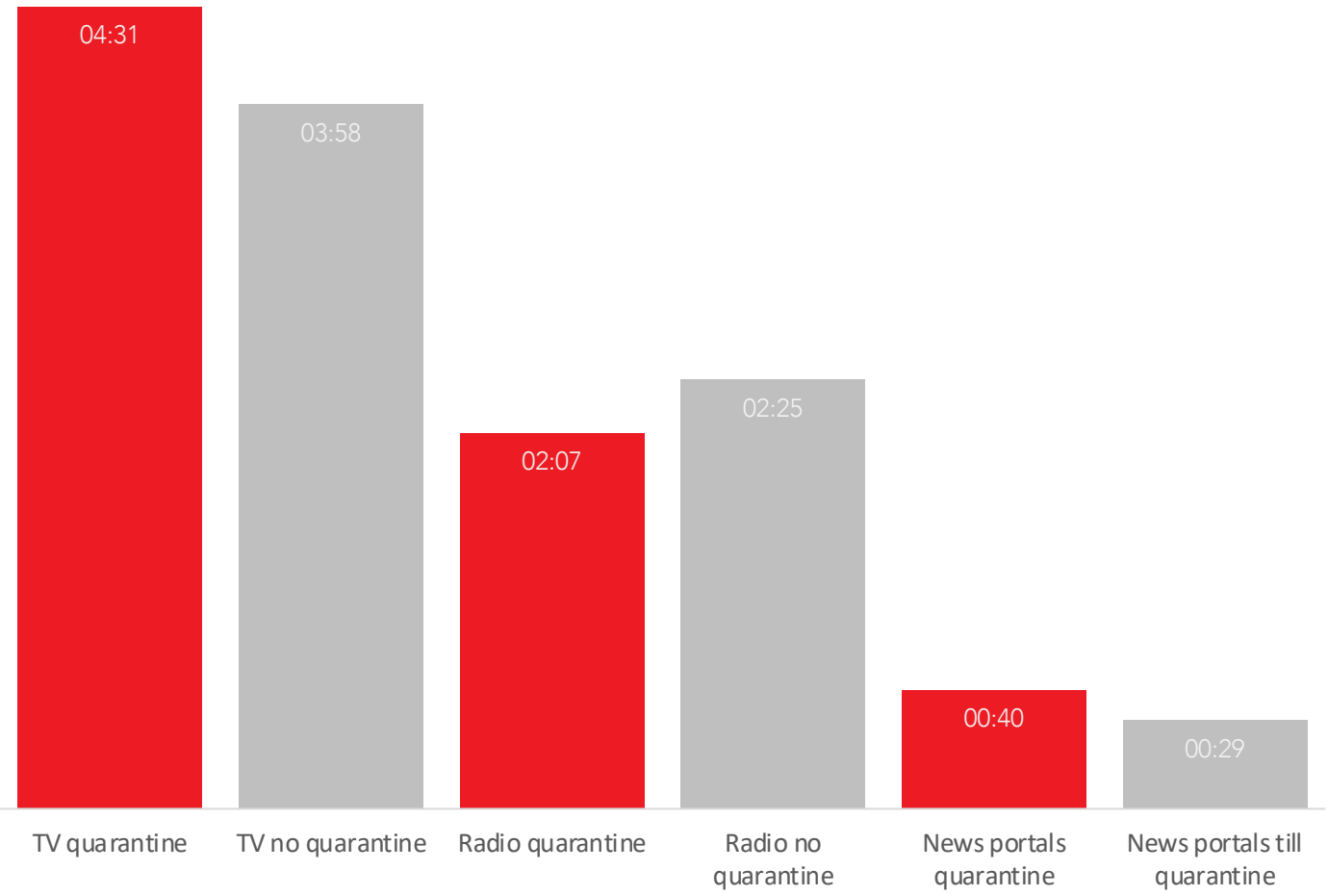
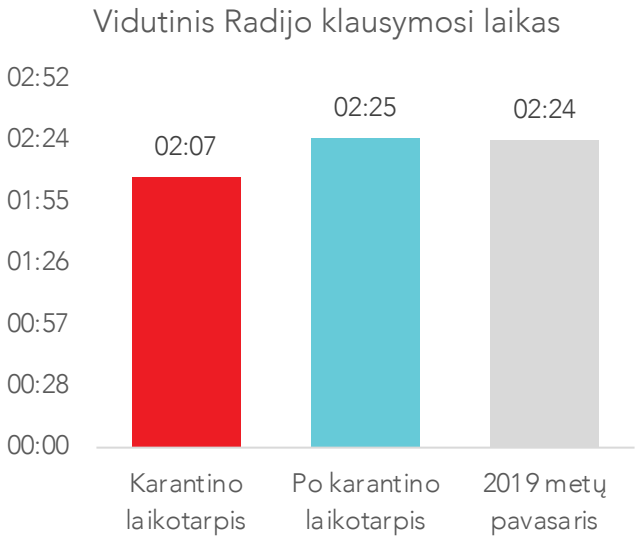
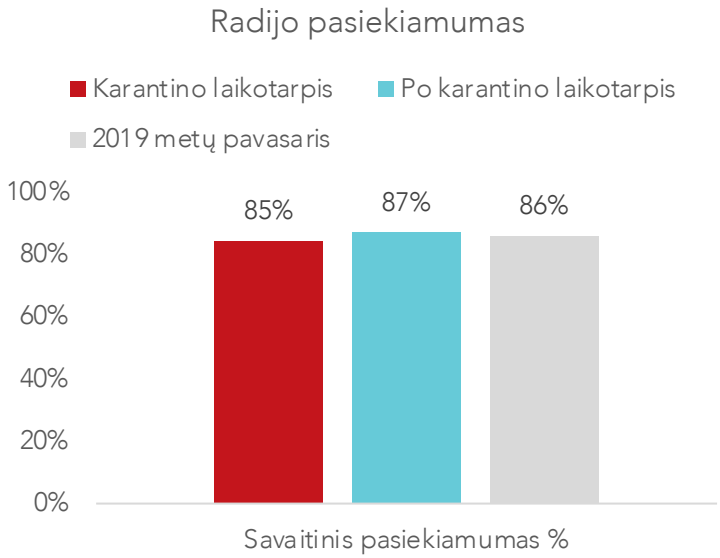
PRALEISTAS LAIKAS SU MEDIA



© Inspired UM 2020 | TNS Kantar; Atlas, Media day, Gemius; Pastaba: reali auditorijų statistika lyginta su tais pačiais tyrimo periodais kaip kad asmeninės nuomonės tyrimo (TNS Media day 2020) IKI Karantino – 2020.02.10-2020.03.15 Karantinas – 2020.03.16-2020.04.05

RADIJAS : KARANTINO ĮTAKA





Vidutinis dienos klausymosi laikas per karantiną sumažėjo **tik 18 min**.

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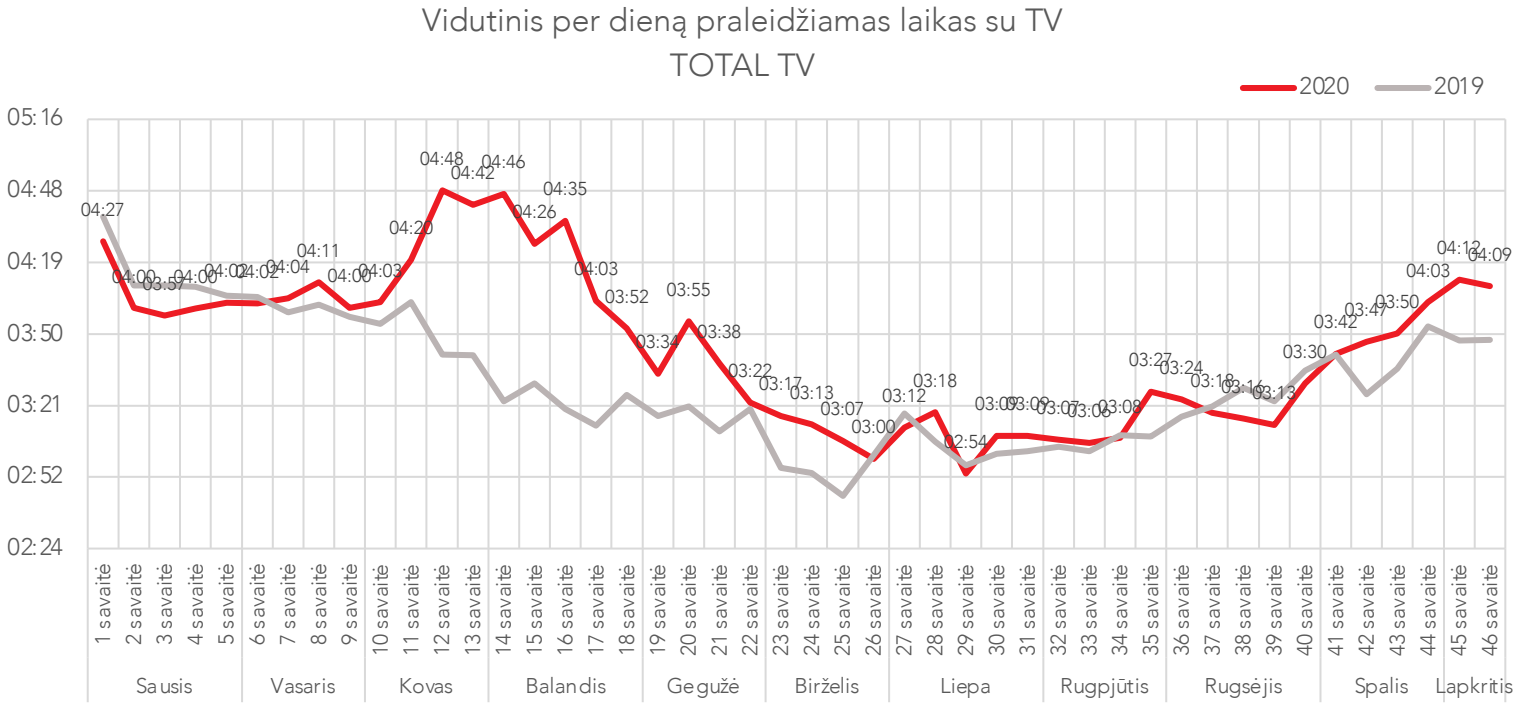
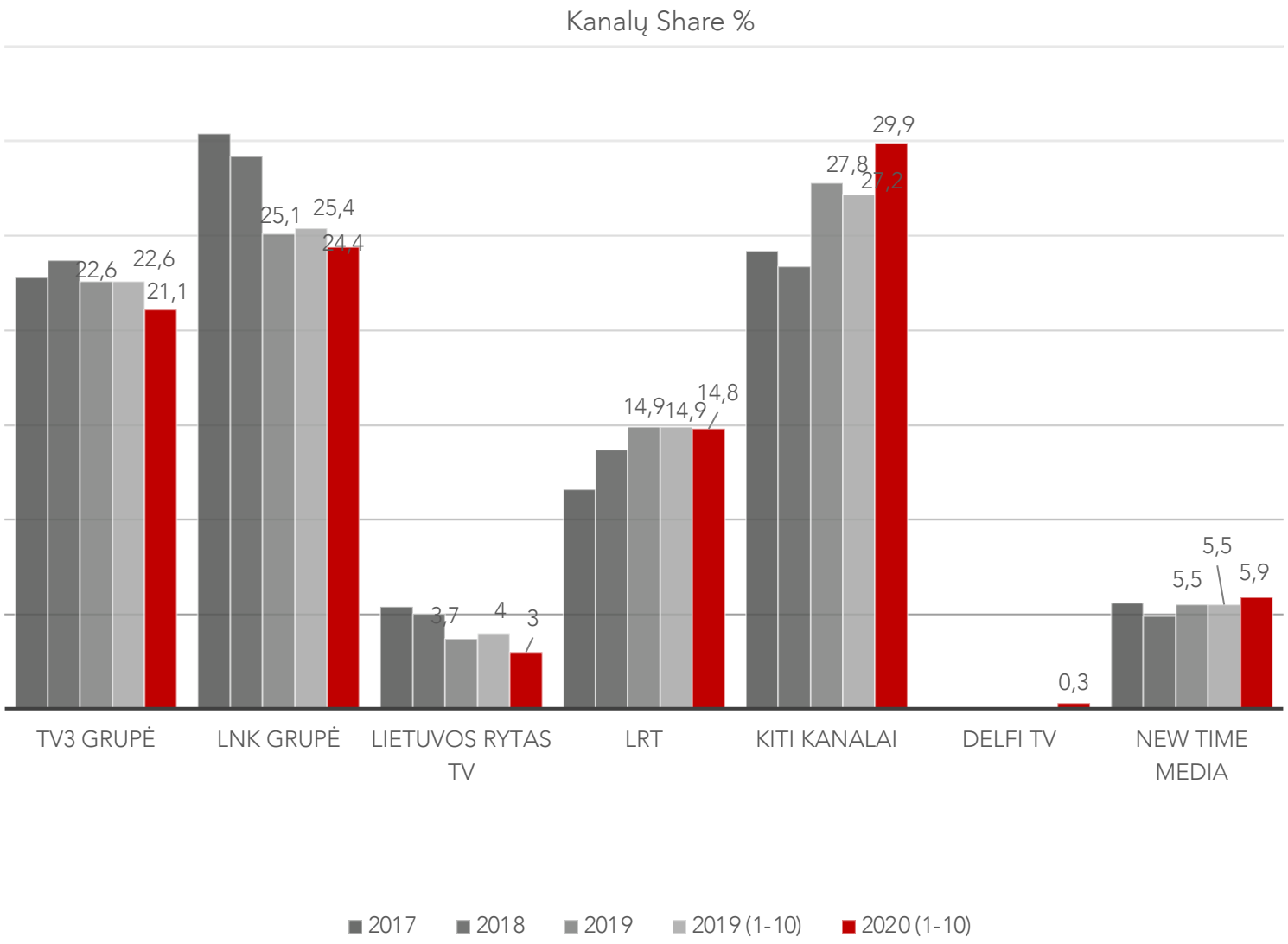
TV

+14 MINUČIŲ KIEKVIENAM PER DIENĄ



© Insp UM 2020| K Instar Analytics; 2020 m. vid. dienos laikas žiūrint TV 3:44 val. 2019 m. – 3:30 val.

KANALŲ SHARE %



© Inspired UM 2020| Kantar, Instar Analytics

Šiek tiek auga „Kitų“ kanalų auditorijos dalis, DelfiTV žiūrovas dar neatrado

TOP SHOW

Nr.	Kanalas	Laida	GRP
1	LNK	KAUKĖS	9,6
2	TV3	TV3 ŽINIOS	9,4
3	TV3	LEDYNMETIS (3 filmai)	8,9
4	LNK	KK2	8,3
5	LNK	NUO...IKI	8,3
6	TV3	FARAI	8,0
7	LRT	AUKSINIS PROTAS	7,7
8	LNK	BUČIUOJU. RŪTA	7,7
9	LRT	EUROLEAGUE/ANADOLU EFES-ŽALGIRIS LRT	7,7
10	TV3	GERO VAKARO ŠOU	7,4

DIGITAL

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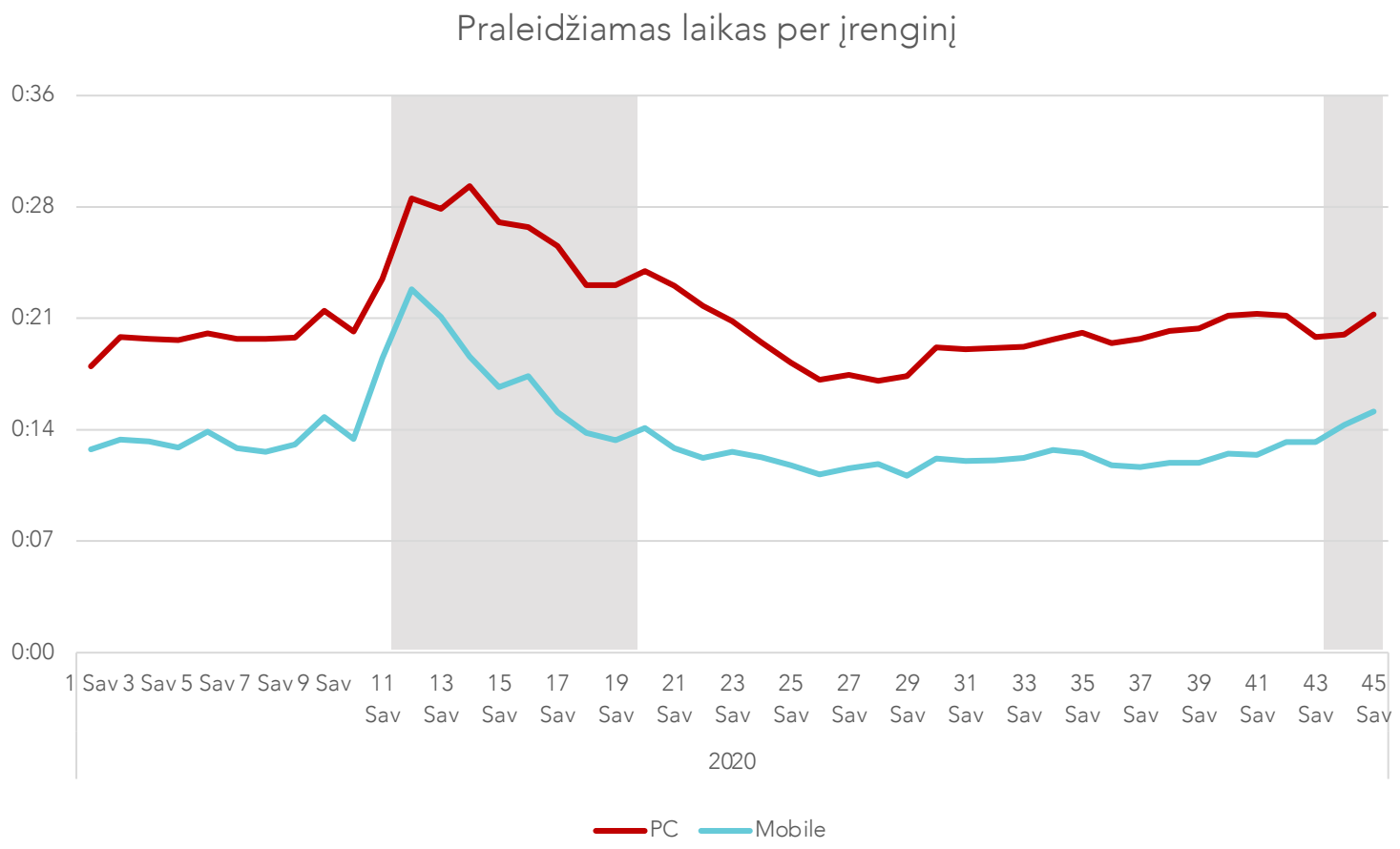
LOCAL PORTALŲ VARTOJIMAS



+28% / +22%

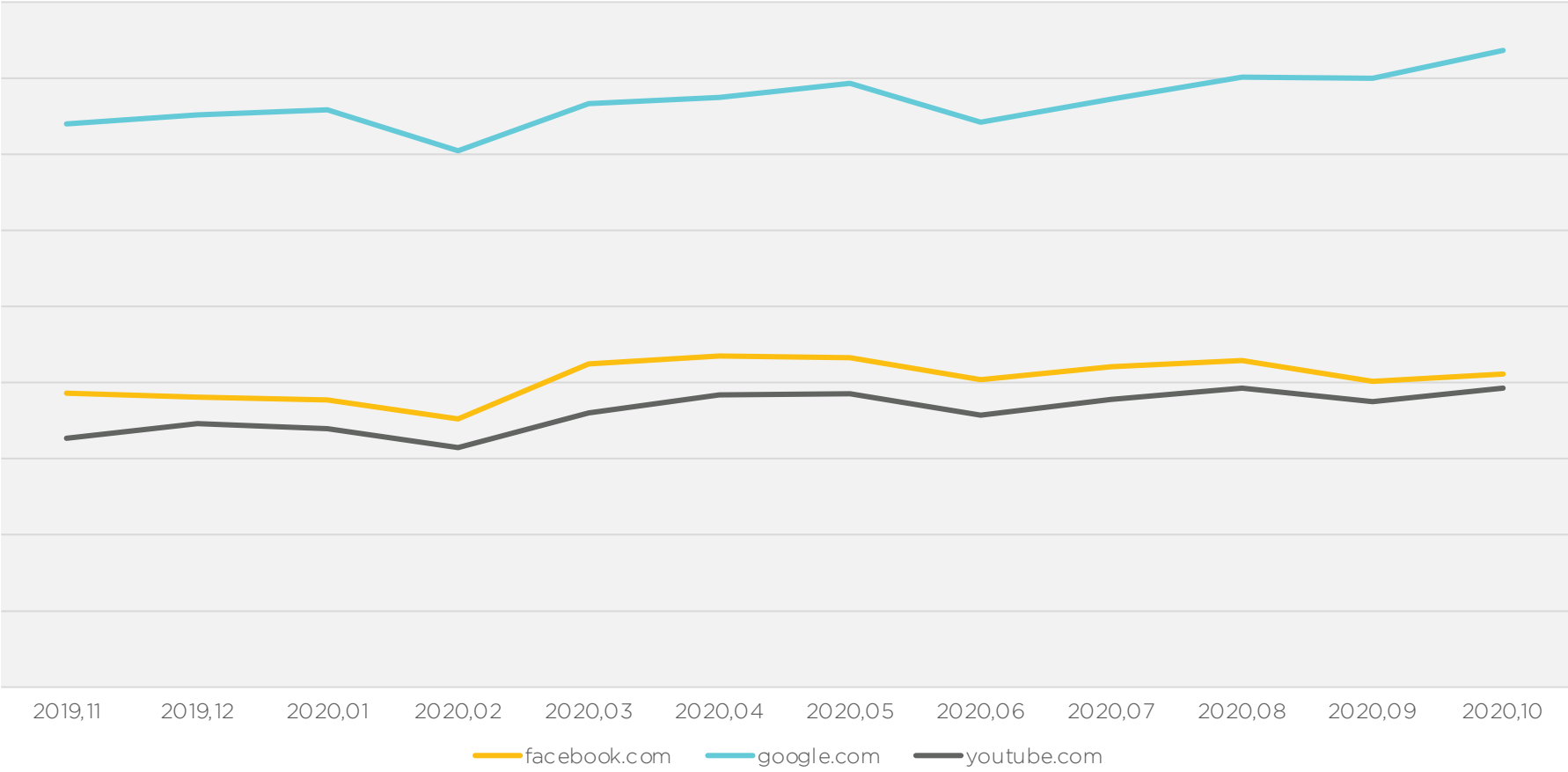
augimas pirmo karantino metu

0% / +11%

augimas prasidedant antram karantinui

© Inspired UM 2020 | GEMIUS 2020; Pirmas karantinas: lyginamos 12-20 karantino savaitės su 2-11; Antras karantinas: lyginamos 45-46 savaitės su 44-43

TOS PAČIOS TENDENCIJOS IR UŽSIENIO PORTALUOSE



© Inspired UM 2020 | Data: Similarweb pro 2020-11 (paskutiniai 12 mėnesių)

ATSAKINGAS MAISTO IR GĖRIMŲ REKLAMAVIMAS GOOGLE PRODUKTUOSE

RIBOJIMAI PRODUKTAMS SU DAUG PRIDĖTO CUKRAUS, DRUSKOS AR RIEBALŲ

REGISTRUOJAMOS VIDEO IR VAIZDO KAMPANIJOS, KURIOSE RODOMI TOKIE PRODUKTAI

REKLAMA LEIDŽIAMA TIK 18+

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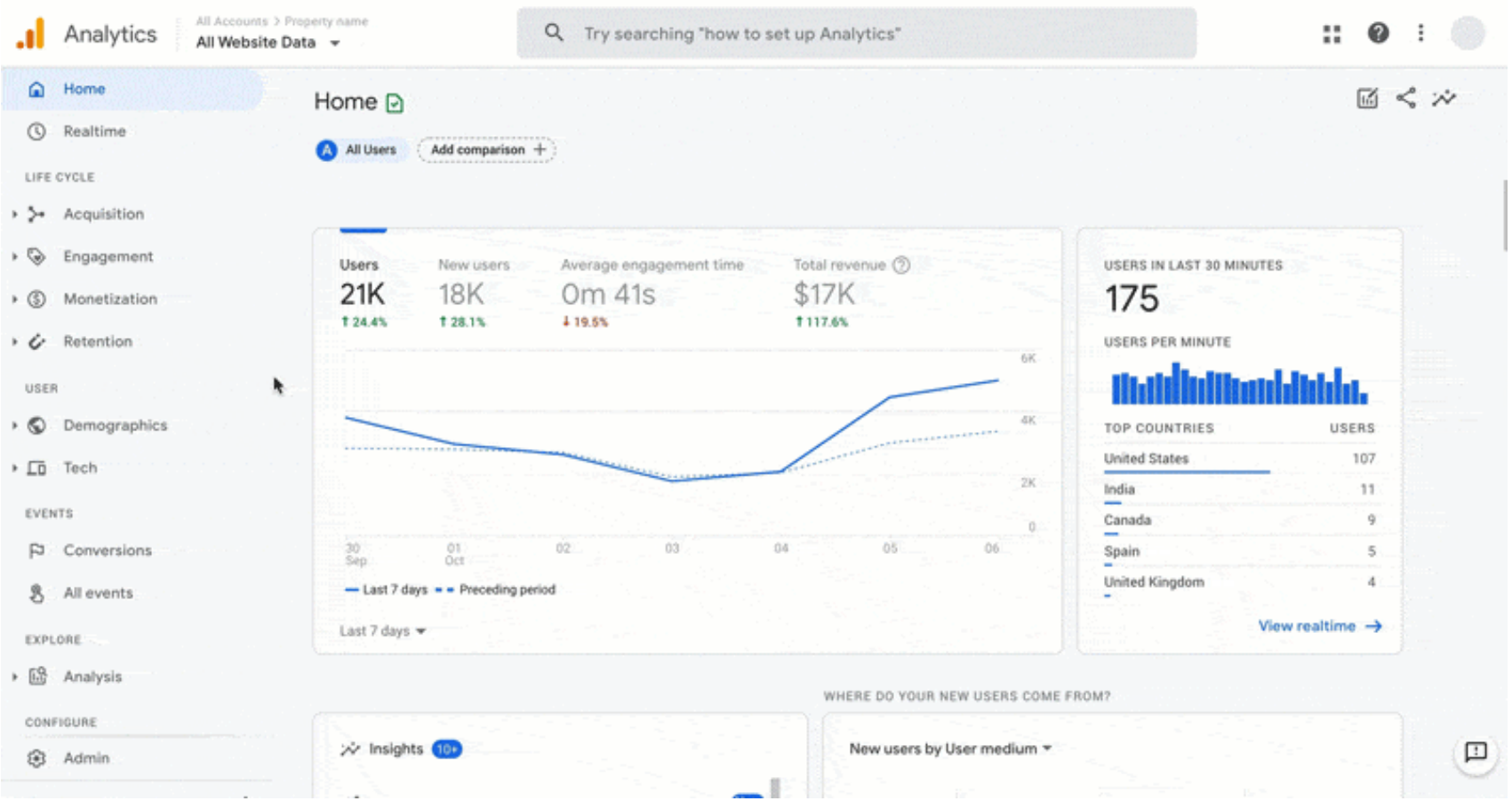
ATSINAUJINANTIS GOOGLE ANALYTICS



PAGRINDINIAI AKCENTAI:

1. DABARTINĖ GA VERSIJA NEBEBUS TOBULINAMA
2. COOKIES PAGRĮSTAS SEKIMAS KEIČIASI Į USERS SEKIMĄ
3. VIENINGI WEB + APP DUOMENYS
4. NAUDOJAMAS USER BASED MODELIAVIMAS, NEBELIEKA DUOMENŲ *SAMPLING*

CONTENT

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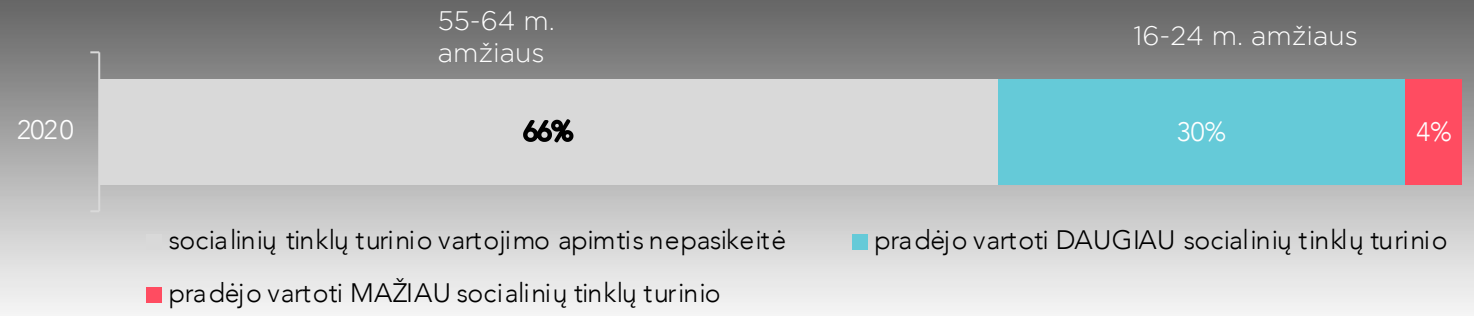
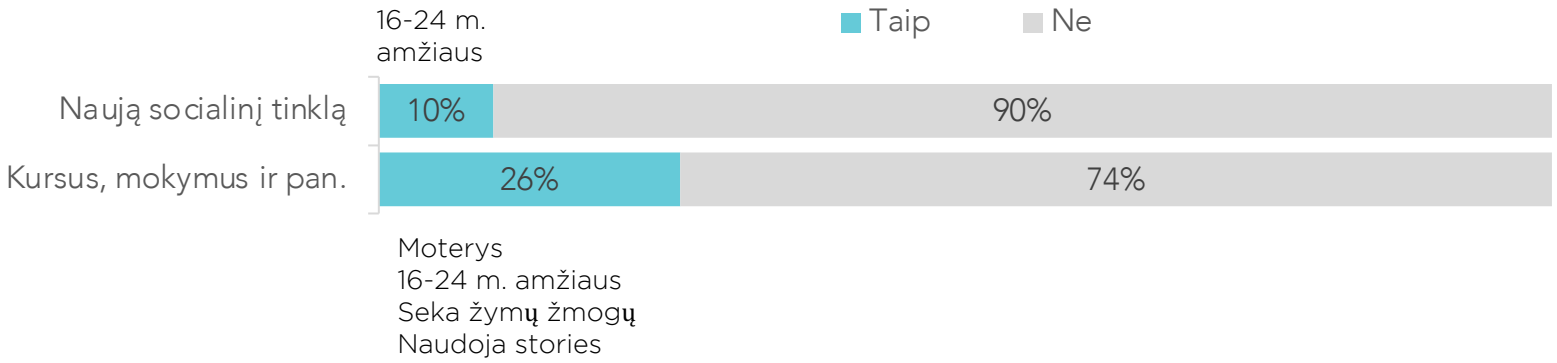
SOCIALINIŲ TINKLŲ VARTOJIMAS KARANTINO METU

Ar karantino (2020 m kovo – birželio mėn.) metu...

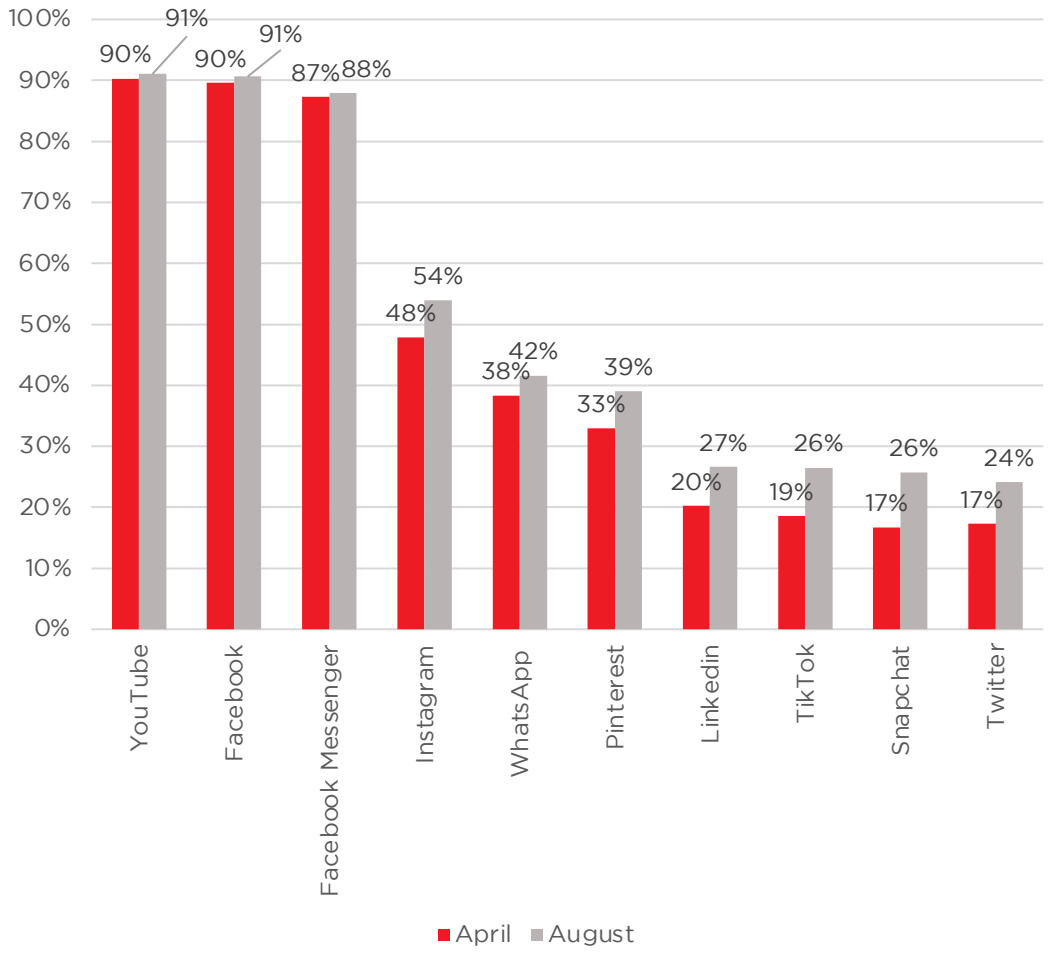


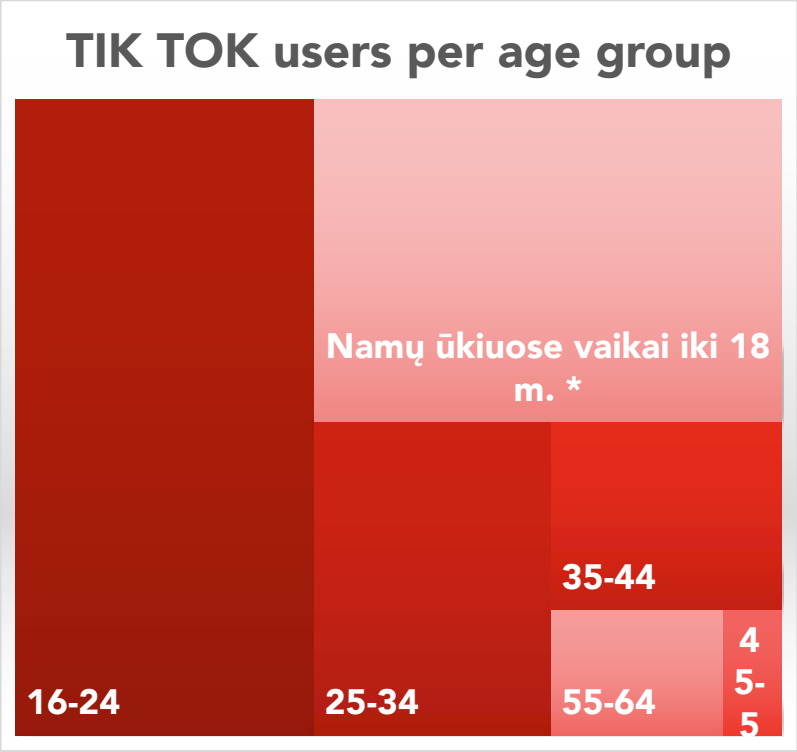
Karantino (2020 m kovo – birželio mėn.) metu jūs atradote:



© Inspired UM 2020 | Data: KOG 2020 n=605

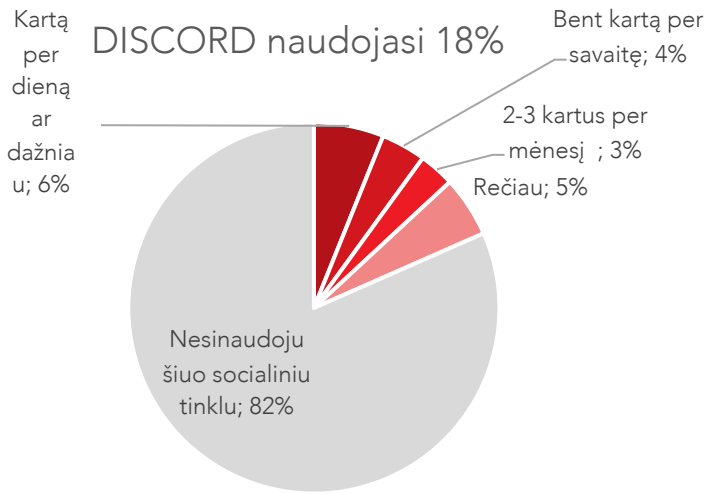
AR VISI VARTOTOJAI IŠĖJO Į TIKTOK?

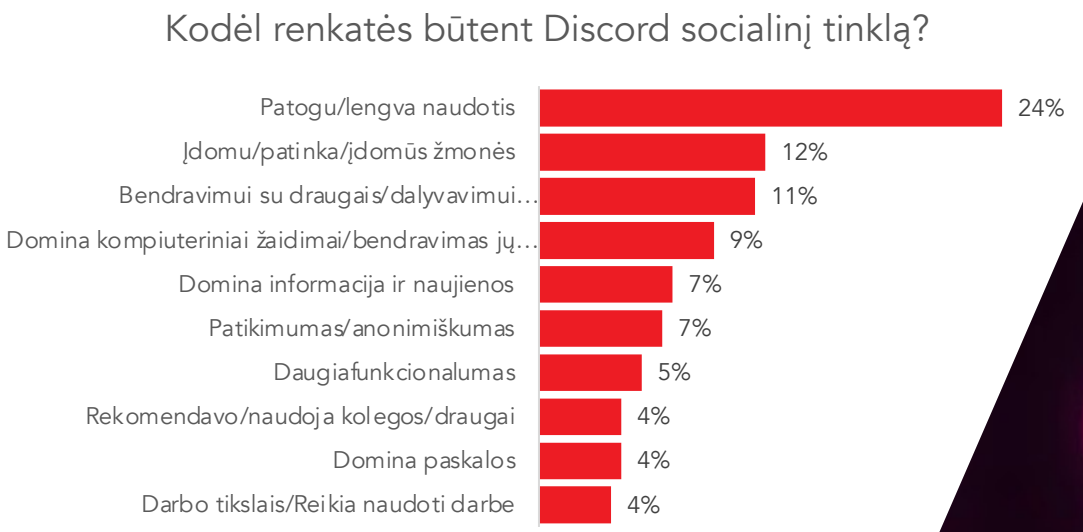


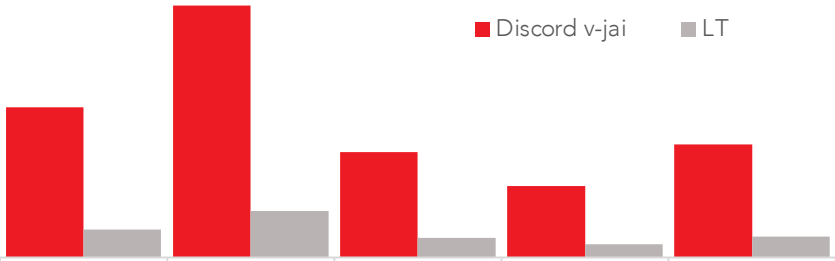


© Inspired UM 2020 | TNS COVID Barometer; KOG tyrimas 2020 07

KARANTINAS 2% PAAUGINO IR DISCORD VARTOTOJŲ



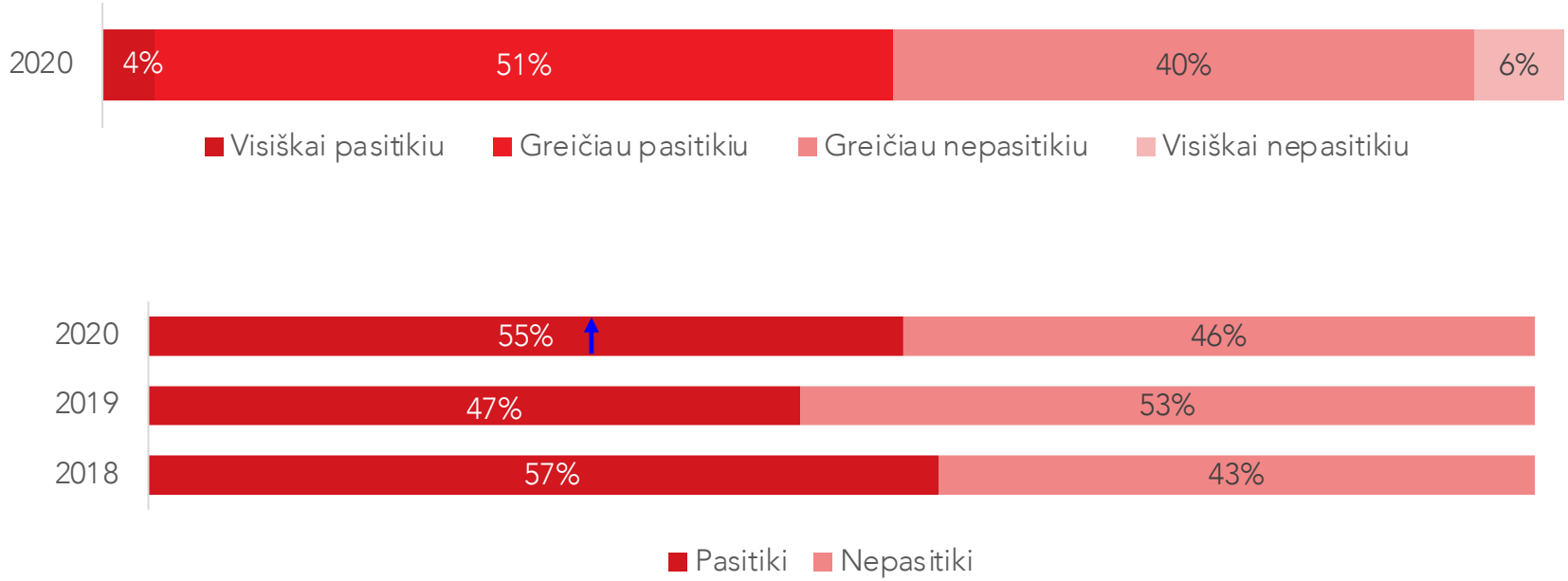




	Daugiau nei iki karantino	Tiek pat, kiek iki karantino	Mažiau nei iki karantino	Iki karantino nesinaudojau (pradėjau naudotis karantino metu)	Sunku pasakyti
Discord v-jai	22%	36%	15%	10%	16%
LT	4%	7%	3%	2%	3%

PASITIKĖJIMAS NUOMONĖS FORMUOTOJAIS

Ar jūs pasitikite žymių žmonių ar kitų socialinėje erdvėje besireiškiančių asmenų nuomone apie paslaugas / produktus?



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„Evelinos kuchnia“ grupė

Karantino kuchnia

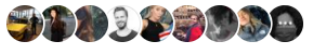
Vieša grupė · Narių: 35,1 tūkst.

„Maxima LT“ grupė

„Telia Lietuva“ grupė

Įsijungiam

Vieša grupė · Narių: 5,5 tūkst.



+ Pakviesti

„Gubernija Brewery“ grupė

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STAY HEALTHY & POSITIVE!

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