数据助力移动电商
APP的精准营销

Tony Lin
Agency Development
Google

- RMB100

智能手机深刻地改变了我们每个人的生活

→

我们不再上网，我们生活在网络上

68%
的手机用户
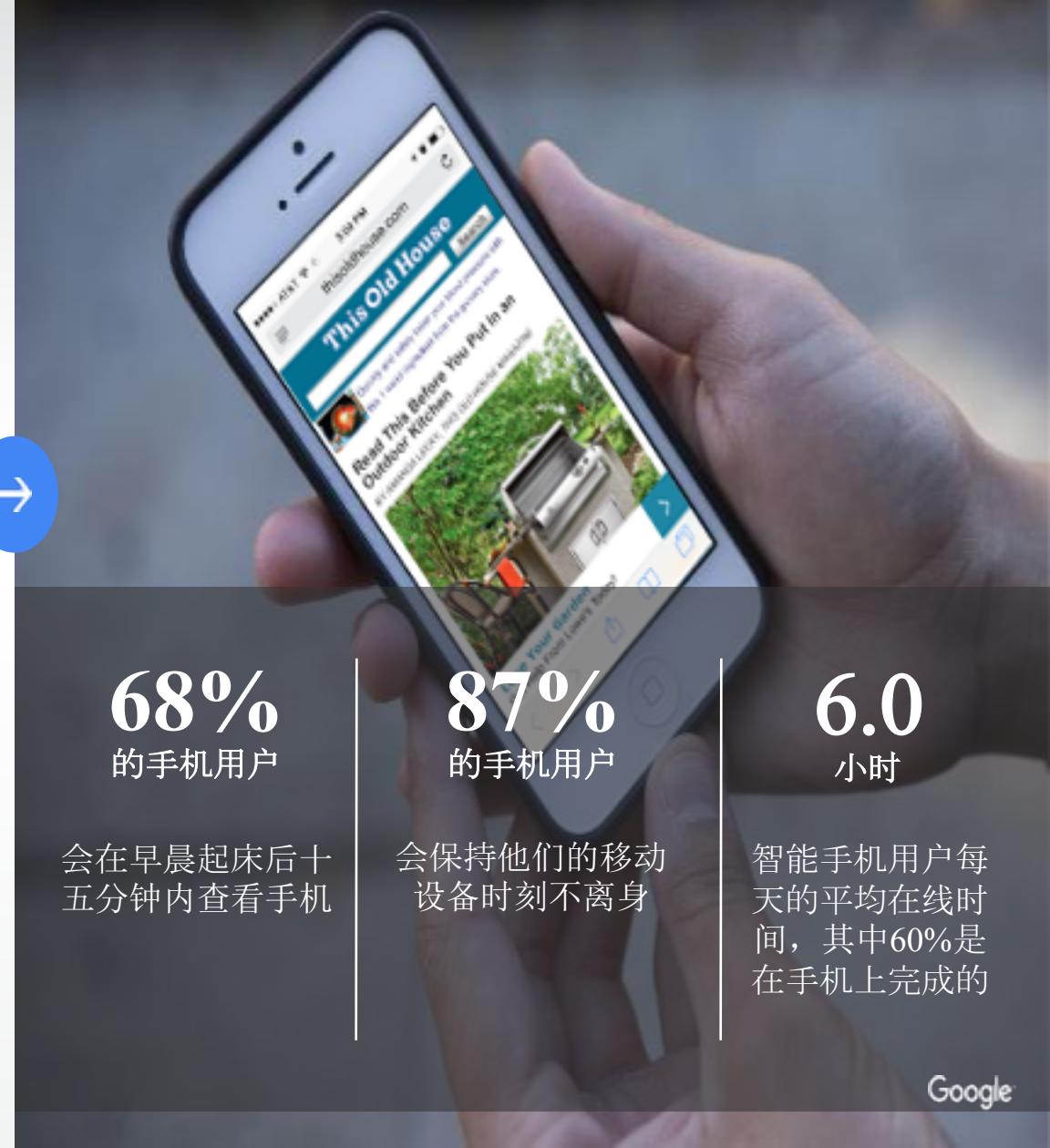
会在早晨起床后十五分钟内查看手机

87%
的手机用户

会保持他们的移动设备时刻不离身

6.0
小时

智能手机用户每天的平均在线时间，其中60%是在手机上完成的

Google

消费者的行为习惯也
在发生改变…

65%

使用手机作为
网购的起点

46%

使用手机完
成网购支付

81%

使用每天的碎
片化时间进行
网购

41%
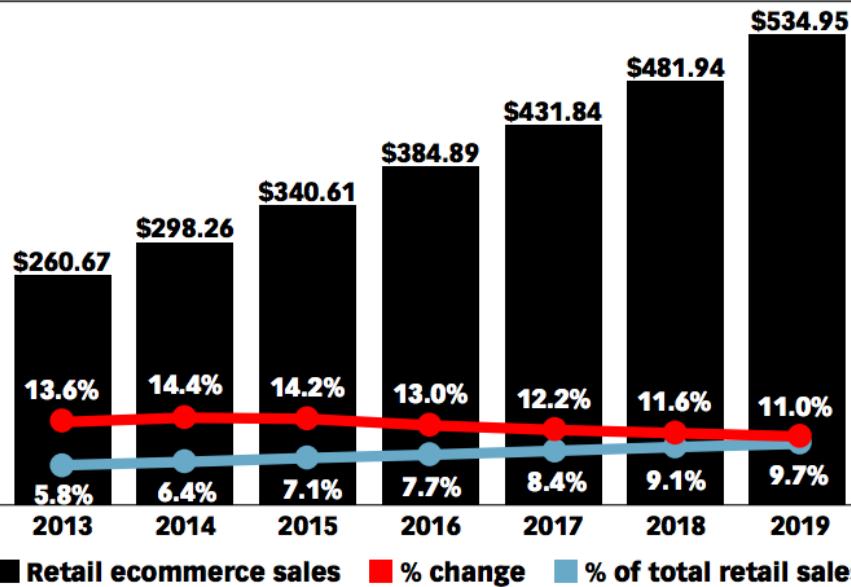
在外出时使用
手机进行网购

美国零售行业

US Retail Ecommerce Sales, 2013-2019
billions, % change and % of total retail sales
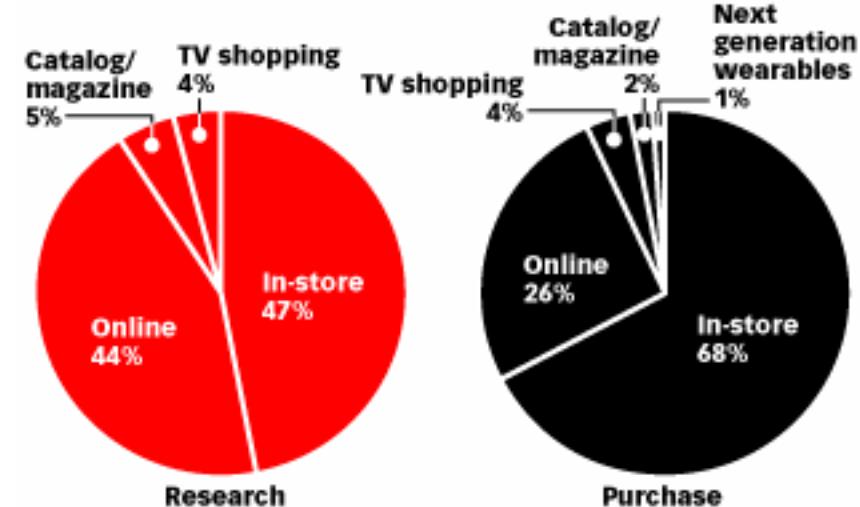
Year	Retail ecommerce sales	% change	% of total retail sales
2013	$260.67	13.6%	5.8%
2014	$298.26	14.4%	6.4%
2015	$340.61	14.2%	7.1%
2016	$384.89	13.0%	7.7%
2017	$431.84	12.2%	8.4%
2018	$481.94	11.6%	9.1%
2019	$534.95	11.0%	9.7%

- ■ Retail ecommerce sales
- ■ % change
- ■ % of total retail sales

Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets
Source: eMarketer, June 2015

Preferred Channel for Researching vs. Purchasing Clothing/Footwear Among US Internet Users, Sep 2014
% of respondents

Research:
- Catalog/magazine 5%
- TV shopping 4%
- Online 44%
- In-store 47%

Purchase:
- TV shopping 4%
- Catalog/magazine 2%
- Next generation wearables 1%
- Online 26%
- In-store 68%

Note: n=1,011 ages 18+; numbers may not add up to 100% due to rounding
Source: PricewaterhouseCoopers (PwC), "Total Retail V Survey: United States," Feb 9, 2015
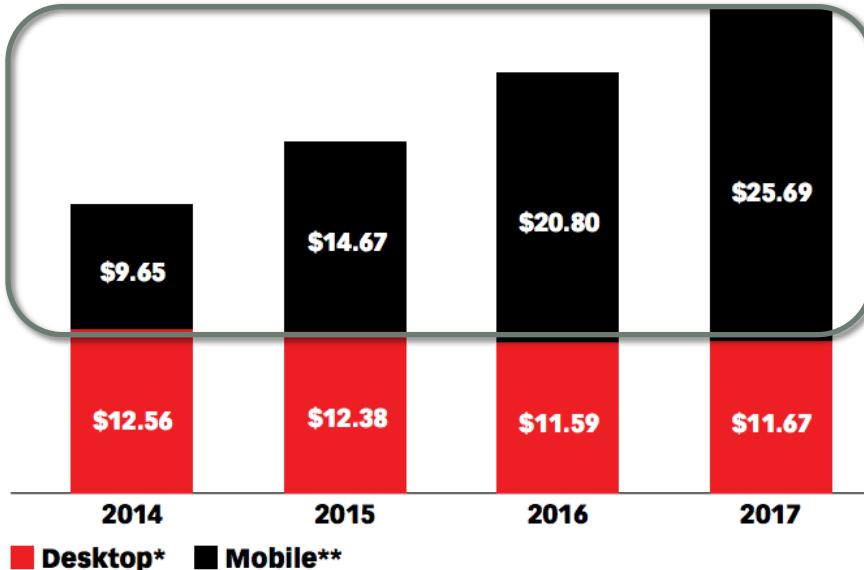
186199   www.**eMarketer**.com

移动端展示广告花费增长迅速，远远超越桌面展示广告

US Display Ad Spending, by Device, 2014-2017
billions

	2014	2015	2016	2017
Mobile**	$9.65	$14.67	$20.80	$25.69
Desktop*	$12.56	$12.38	$11.59	$11.67

■ Desktop* ■ Mobile**

*Note: includes banners, rich media, sponsorships, video and other (static display ads such as Facebook's News Feed Ads and Twitter's Promoted Tweets); *includes spending primarily on desktop-based ads; **ad spending on tablets is included*
Source: eMarketer, March 2015

- 展示广告的下一个战场是在移动端，而且包括视频，多媒体等各种类型广告

移动电商是E-Commerce的最新发展方向

Retail Mcommerce Sales in China, 2014-2019

	2014	2015	2016	2017	2018	2019
Retail mcommerce sales (billions)	$180.40	$333.99	$505.74	$737.07	$1,039.84	$1,410.72
—% change	211.5%	85.1%	51.4%	45.7%	41.1%	35.7%
—% of retail ecommerce sales	38.1%	49.7%	55.5%	61.0%	66.3%	71.5%
—% of total retail sales	4.7%	7.9%	10.9%	14.5%	19.0%	24.0%

Note: converted at exchange rate of US$1=RMB6.15; includes products or services ordered using the internet via mobile devices, regardless of the method of payment or fulfillment; includes sales on tablets; excludes travel and event tickets; excludes Hong Kong
Source: eMarketer, July 2015
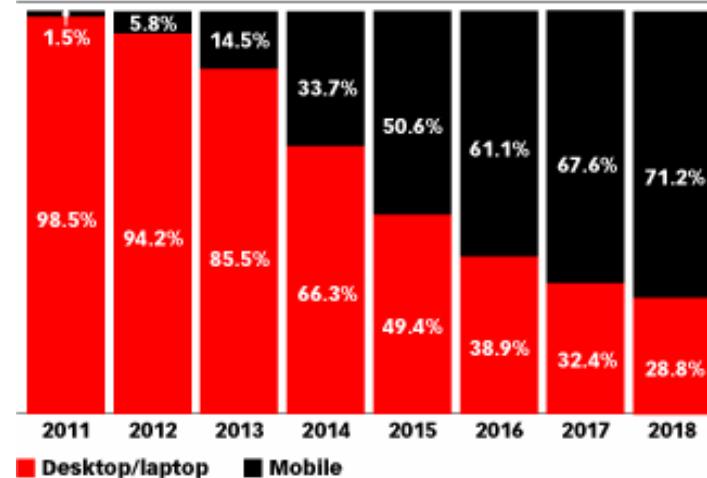
192088   www.**eMarketer**.com

Retail and C2C Ecommerce Transaction Share in China, Desktop/Laptop vs. Mobile, 2011-2018
% of total

	2011	2012	2013	2014	2015	2016	2017	2018
Mobile	1.5%	5.8%	14.5%	33.7%	50.6%	61.1%	67.6%	71.2%
Desktop/laptop	98.5%	94.2%	85.5%	66.3%	49.4%	38.9%	32.4%	28.8%

■ Desktop/laptop   ■ Mobile

Note: excludes travel
Source: iResearch Consulting Group, "2015 China Online Shopping Report," June 26, 2015
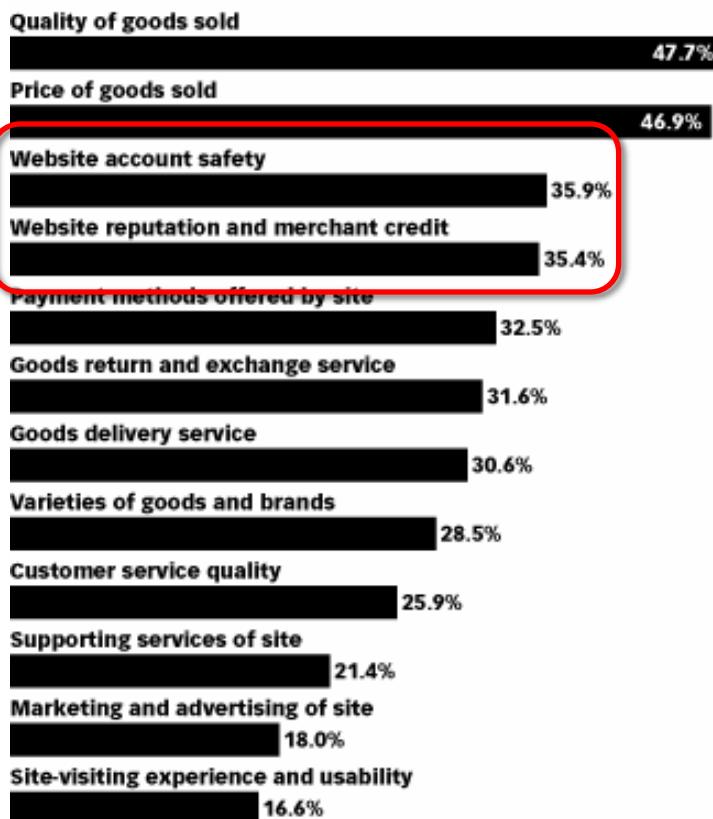
193142   www.**eMarketer**.com

- M-Commerce 移动电商预计在未来四年，在中国会持续高增长。值得一提的是，移动电商占零售业的比重将会提升，预计在2019年，中国零售业的24%销售额来自移动电商。

- 同时，中国消费者也越来越习惯和偏向于在移动端付款。

- 对于APP开发者来说，如何设计出能抓住消费者习惯的APP是制胜关键。零售APP和游戏／工具类APP不同，需要了解的方面有: Consumer Path to Purchase, Browsing Behavior, Seasonality, "Fashion Sense/Predictability", User Experience (Retail Point of View)等

除了APP，移动网站的设计也至关重要

Important Factors When Choosing Which Ecommerce Sites to Visit According to Digital Buyers in China, Dec 2014
% of respondents

Quality of goods sold	47.7%
Price of goods sold	46.9%
Website account safety	35.9%
Website reputation and merchant credit	35.4%
Payment methods offered by site	32.5%
Goods return and exchange service	31.6%
Goods delivery service	30.6%
Varieties of goods and brands	28.5%
Customer service quality	25.9%
Supporting services of site	21.4%
Marketing and advertising of site	18.0%
Site-visiting experience and usability	16.6%
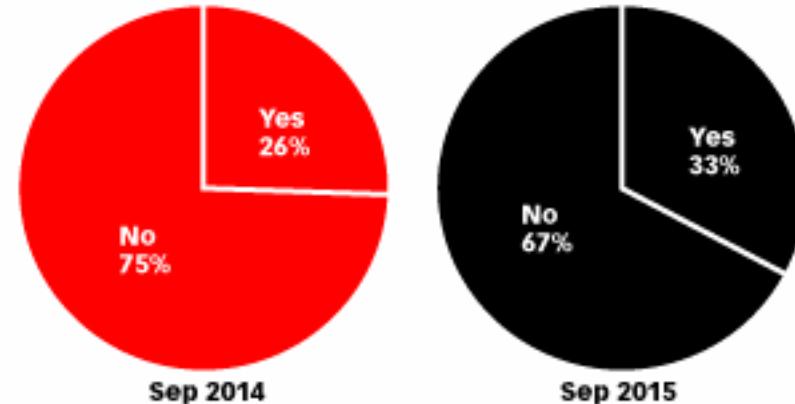
Source: iResearch Consulting Group, "2015 China Online Shopper Report," May 4, 2015

191157   www.**eMarketer**.com

US SMBs that Have a Mobile-Optimized Website, Sep 2014 & Sep 2015
% of respondents

Sep 2014: Yes 26% / No 75%
Sep 2015: Yes 33% / No 67%

Note: n=379 who have or plan to create a professional website for their business; numbers may not add up to 100% due to rounding
Source: RBC Capital Markets, "Internet: Highlights from SMB Survey of Web Enablers," Sep 10, 2015
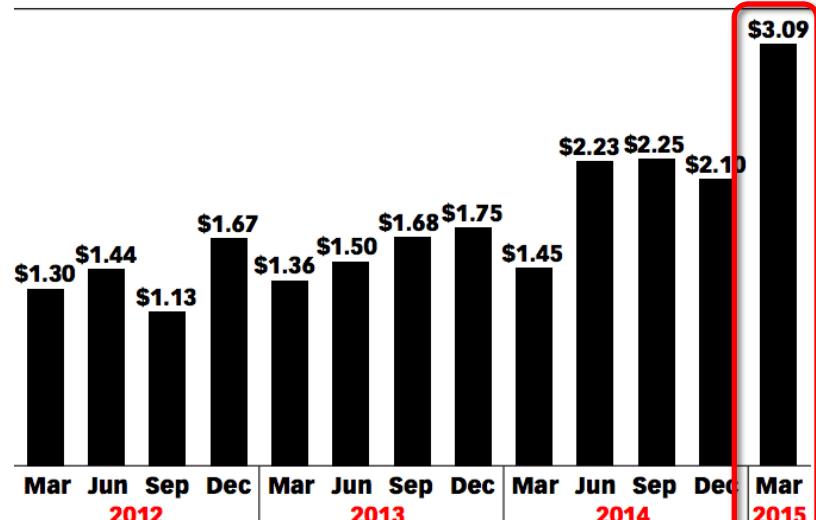
196639   www.**eMarketer**.com

- 在消费者心中，网上购物时，除了看货品的质量，价钱以外，最重要的就是网站的安全和声誉

- 如果移动电商没有一个好的移动站，着两方面会大折扣

- 而很多SMB由于种种原因，是没有一个好的移动网站的

- 在美国，SMB已经意识到这个问题并做出改变

拿到用户的cost大幅度的上升是客户需要面对的事实

Average Cost of Acquiring a Loyal iPhone App User in the US, March 2012-March 2015

Period	Cost
Mar 2012	$1.30
Jun 2012	$1.44
Sep 2012	$1.13
Dec 2012	$1.67
Mar 2013	$1.36
Jun 2013	$1.50
Sep 2013	$1.68
Dec 2013	$1.75
Mar 2014	$1.45
Jun 2014	$2.23
Sep 2014	$2.25
Dec 2014	$2.10
Mar 2015	$3.09

Source: Fiksu, Sep 2012-April 2015
172832   www.**eMarketer**.com

Average Cost per Install (CPI) for Android and iOS Mobile Apps in the US, March 2013-March 2015

	Android	iOS
March 2013	$1.25	$0.81
June 2013	$0.82	$0.81
Sep 2013	$0.75	$0.87
Dec 2013	$1.87	$0.93
March 2014	$1.07	$1.05
June 2014	$1.40	$1.06
Sep 2014	$1.14	$1.21
Dec 2014	$1.41	$1.17
March 2015	$1.74	$1.53

Note: defined as the cost per app install directly attributed to advertising
Source: Fiksu, May 2013-April 2015
183574   www.**eMarketer**.com

- APP会越来越多，用户选择会越来越多，投广告的预算也会越来越多

- In-APP 投放的优化技巧，方式，Google已经和我们代理商，直客经常沟通，做培训。In-APP高手也越来越多。

- 除了比产品，比营销预算，客户可以考虑用一些 non-traditional 的方法做投放，多方位抓出潜在用户

用户通过不同的渠道和思维方式来找到新的应用并且下载它们

不同的广告形式/类型促使用户进行应用程序的下载
在智能设备上展示的广告

50%	搜寻 广告
47%	应用中展示的图片广告
45%	网页中展示的图片广告
43%	视频 广告

Google

Google 的应用广告资源不但质量优异，而且规模庞大

覆盖面

AdMob by Google

Google Display Network

9 亿	每个月的唯一身份设备数
65 万+	款付费小众应用
200 万+	个网站

意向

g 搜索

Google play

10 亿+	用户
190+	个国家/地区
27%	的用户借助搜索来查找应用
1000 亿	次移动搜索/月

互动
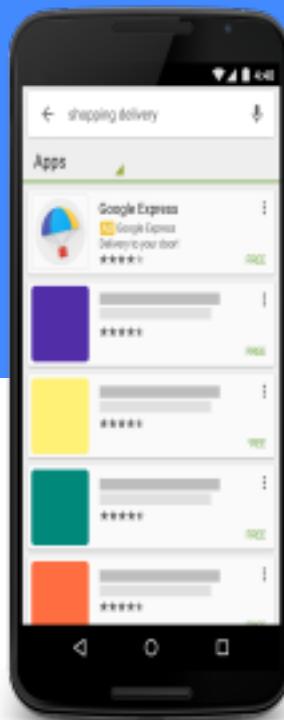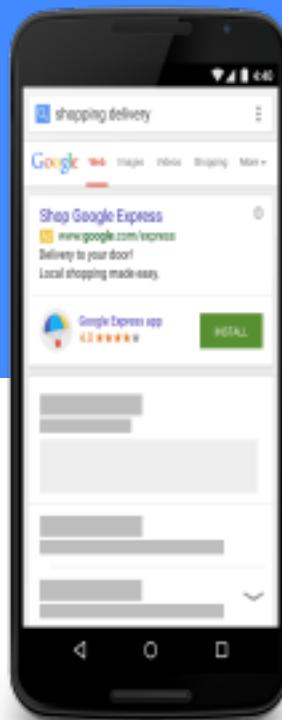
YouTube

10 亿+	唯一身份用户
60 亿	小时的视频观看时长/月
20 亿+	次移动观看/天
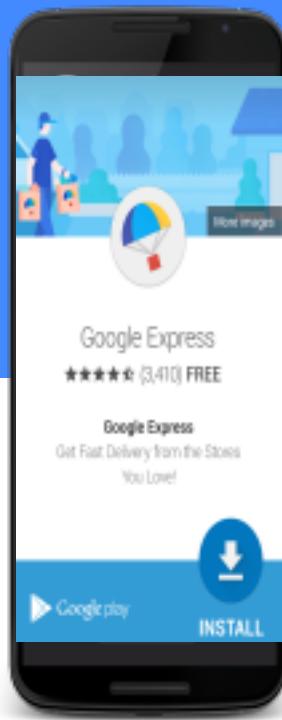
Google可提供一站式解决方案，帮助您吸引各种情境中的理想用户安装您的应用…
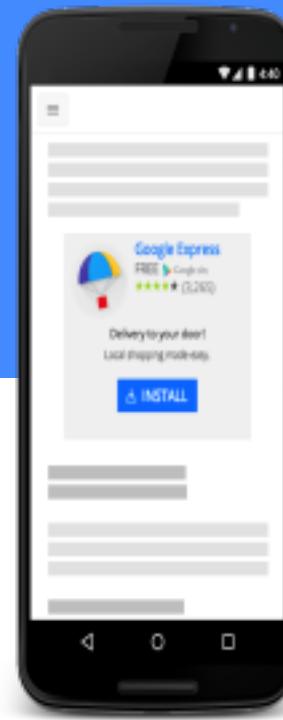
在 Play Store中
发现精彩
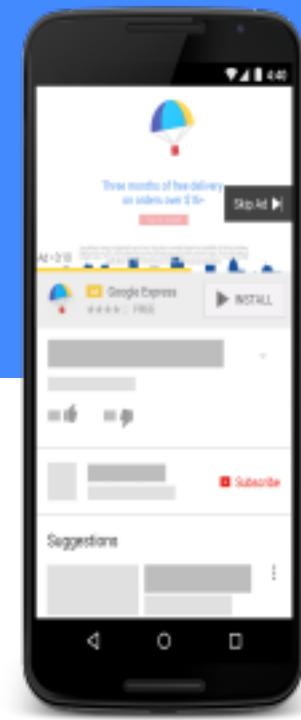
在 Google.com 上
搜索

使用
手机应用
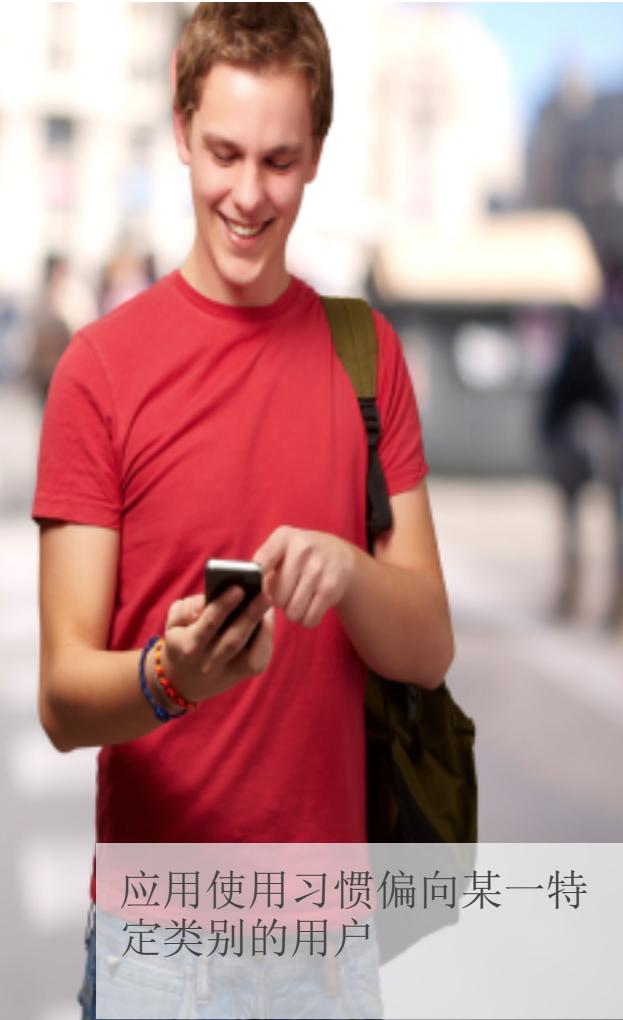
在手机网页上
冲浪

在 手机 YouTube 上
观看视频

Google的大数据帮你定位高价值用户！

没有下载过应用的用户

应用使用习惯偏向某一特定类别的用户

曾在（其他）应用中做过花费的用户

弹性的数据追踪方式任君选择！

跟踪方式	优势
Codeless转化追踪 (仅限安卓)	无需更改应用，无需添加代码
SDK转化追踪	(Google AM推荐）追踪安卓/iOS安装，应用中转化（购买、注册），也可做再行销。
第三方追踪	追踪应用激活（第一次打开），跨渠道追踪，安装回传方案现已生效！
谷歌分析 (GA)	一流的分析跟踪工具，可在分析跟踪来自不同来源的应用用户行为。

谨记：准确的追踪是找到高质量用户的前提！

自动屏蔽已经下载过你的App的用户

付费用户定位

没有"付费历史"的Google Play或AppStore账号对应的移动设备，不会看到您的广告

- **In-App Purchasers (IAP):**
  曾在安卓应用中做过应用内付费的用户

- **Paid App Purchasers：**
  适用于曾在Google Play或App Store中购买过付费应用的用户

新移动设备定位
寻找"7天、14天、30天、60天、90天"的新设备 & 定位它！

先睹为快: 相似用户定位 **Beta**

相似用户定位功能帮你找到与你现有高价值用户有着相似行为的新用户！

上传一个包含现有高价值用户设备号的**'seed'列表**，使用Google
　　SDK或你的第三方追踪

Google's 独有的**"machine-learning algorithm"**帮你找到与你所
　　提供列表中有相似行为/特征的用户

需要帐户经理帮您申请白名单

1 ⁱⁿ 4

已安装应用会被用户
每天打开*

1 ⁱⁿ 5

应用被忘记**
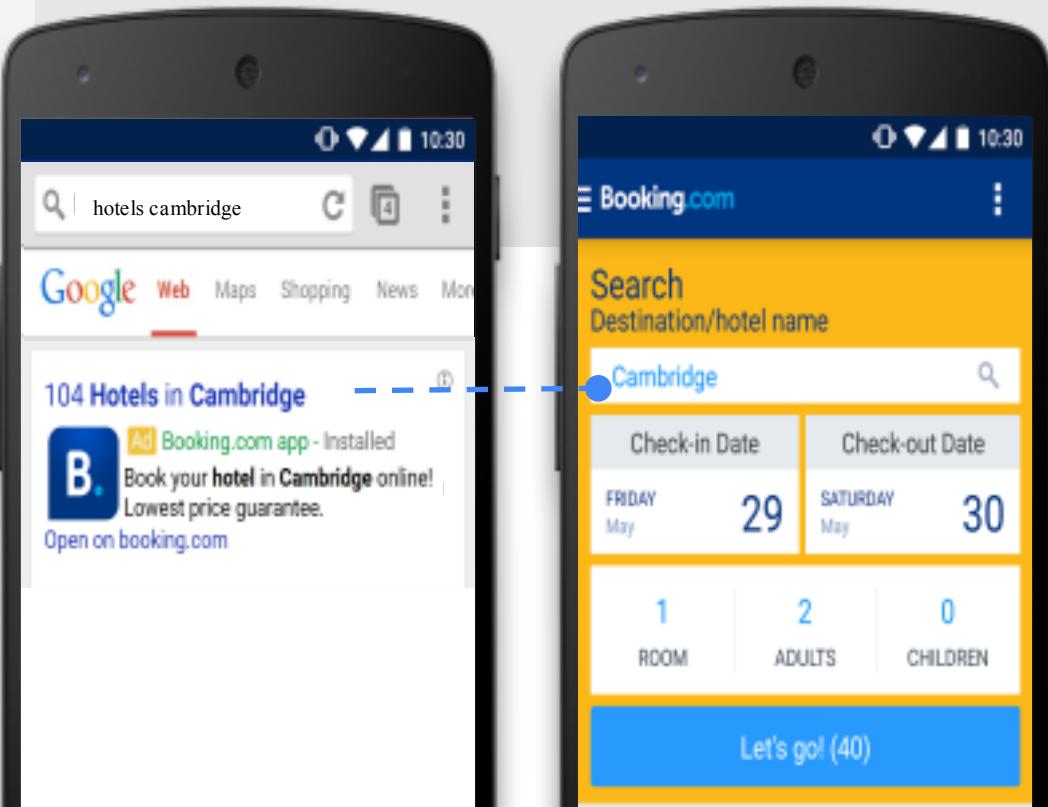
启动深度链接，送用户去到某一特定应用内页

想直接送现有用户去到下单页/游戏第x关/会员注册页面？

绝无仅有的Web-App用户体验！

Talk with your developer team to make sure you have Google's deep linking schema enabled

最佳实践：用户分类

	用户活动	推广策略	广告语
	渐渐不再回到应用中的用户	提升用户互动性	"查看应用内的全新功能！"
	高价值用户	维持用户忠诚度	"买道具A，获道具B半价优惠奖赏"
	"购物车遗弃"用户	Close掉这个订单！	"仅限今天…"
	已经下载您公司另一款应用的用户	交叉推广	"Like Lab Pixies apps? Download the new Lab Pixies app"

RMB100