Sensor Tower

India
**State of Digital
Advertising** 2025
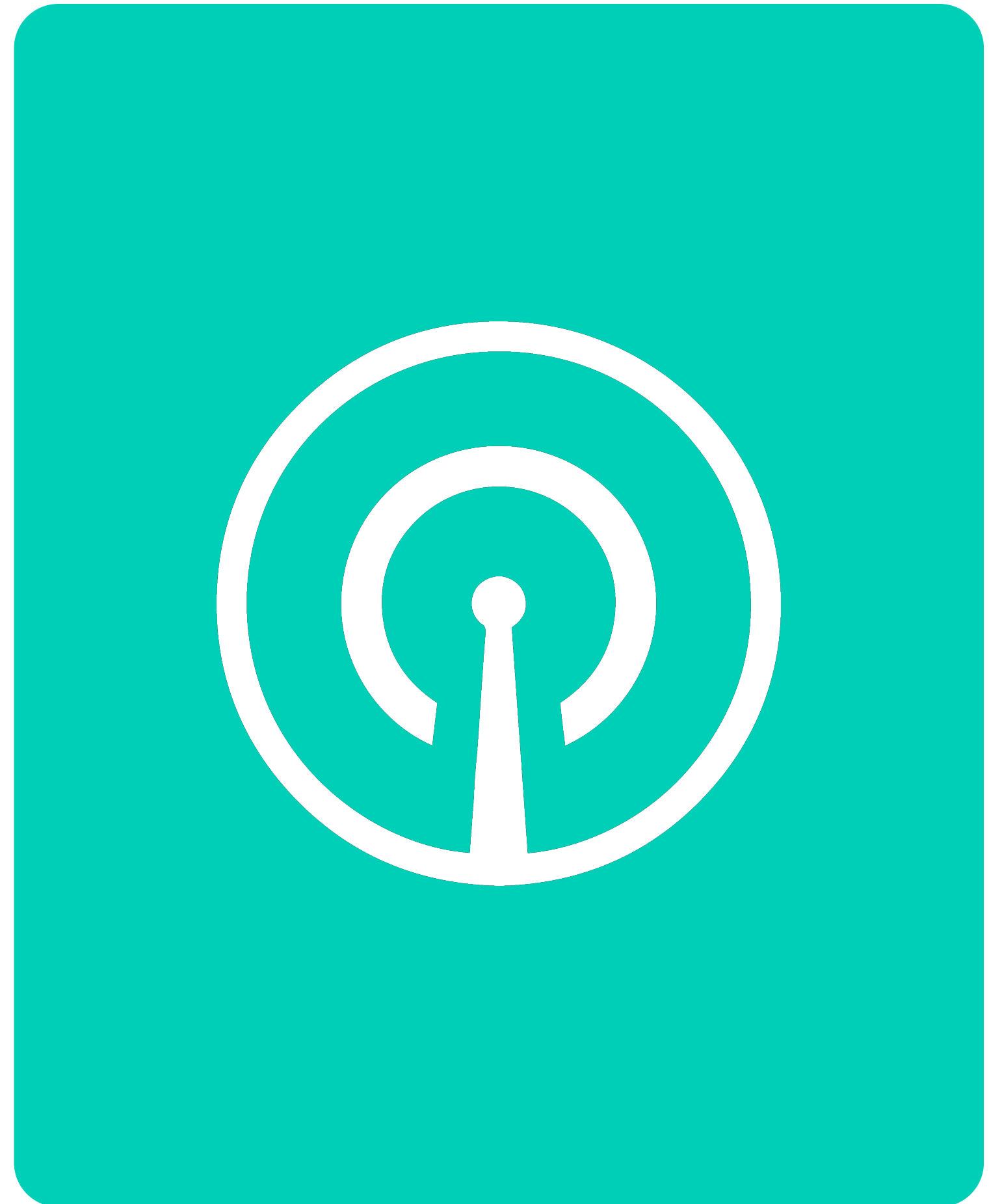
Sensor Tower
Introduction/Overview

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

Press Inquiries: press-apac@sensortower.com
Business Inquiries: sales@sensortower.com

Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

Note: Top publishers by app store revenue | Source: Sensor Tower

Sensor Tower
Solutions
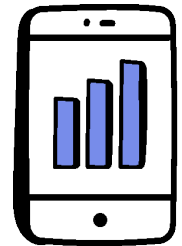
Sensor Tower
App Performance Insights

For those who need visibility into the mobile app ecosystem.

Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.

Sensor Tower
App Advertising Insights

For those who need visibility into paid user acquisition strategies.

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.
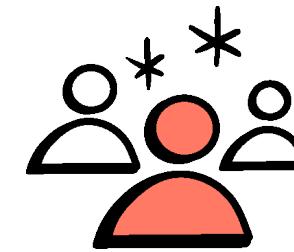
Sensor Tower
Audience Insights

For those who need visibility into your existing, competitor, and potential new audiences.

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

Sensor Tower
Pathmatics Digital Advertising Insights

For those who need visibility into the digital ad ecosystem.

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

Sensor Tower
Solutions
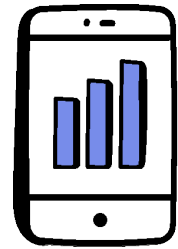
Gaming Insights

For those who need the deepest look into the mobile gaming ecosystem.

Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).
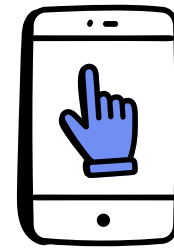
Sensor Tower
Advanced Usage Insights

For those who need the deepest look into app user engagement.

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.

Sensor Tower
Pathmatics Retail Media Insights

For those who need industry-first insight into on- and off-site retail media network investments

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.

Sensor Tower
Video Game Insights

Discover top game trends on PC and Console platforms

Get deep insights into key metrics like sales, revenue, DAU, and MAU for over 140,000 PC and Console games across 100+ global markets. Analyze shifts in player behavior to uncover critical intelligence on player acquisition and retention.

Sensor Tower
Data & Methodology

Sensor Tower's **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimize ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, India, Japan, Mexico, New Zealand, Spain, South Korea, and the United Kingdom. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

Pathmatics collects digital ad samples from the web and utilizes statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

Digital Advertising Channels Supported by Pathmatics Across Markets

	Desktop Display and Video	Facebook Instragram	LINE	Linkedin	Mobile App Ad Networks	Mobile Display and Video	OTT	Pinterest	Reddit	Snapchat	TikTok	X	YouTube
United States	•	•		•	•	•	•	•	•	•	•	•	•
Australia	•	•				•		•		•	•		•
Brazil		•		•				•			•	•	
Canada	•	•		•		•		•		•			•
France		•		•				•					•
Germany	•	•		•				•					•
India		•						•		•		•	
Italy		•						•			•		•
Japan		•	•		•						•		•
Mexico		•									•		•
New Zealand	•	•				•							•
South Korea		•			•						•		•
Spain		•						•		•	•		•
United Kingdom	•	•		•	•	•		•	•	•	•	•	•

Sensor Tower
Executive Summary

The report provides an in-depth analysis of India's digital advertising market in 2025. It includes trends in advertising spend and impressions, as well as the performance of key categories such as Shopping, and a deep dive of the Festive Season in India. Through case studies, the report also explores digital advertising strategies, creative trends, and audience profiles of leading advertisers in India—including Beauty Retail brands Nykaa, and Apparel Brands Myntra and AJIO.

Clarification on Downloads Data

Sensor Tower's downloads figures are derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

Agenda
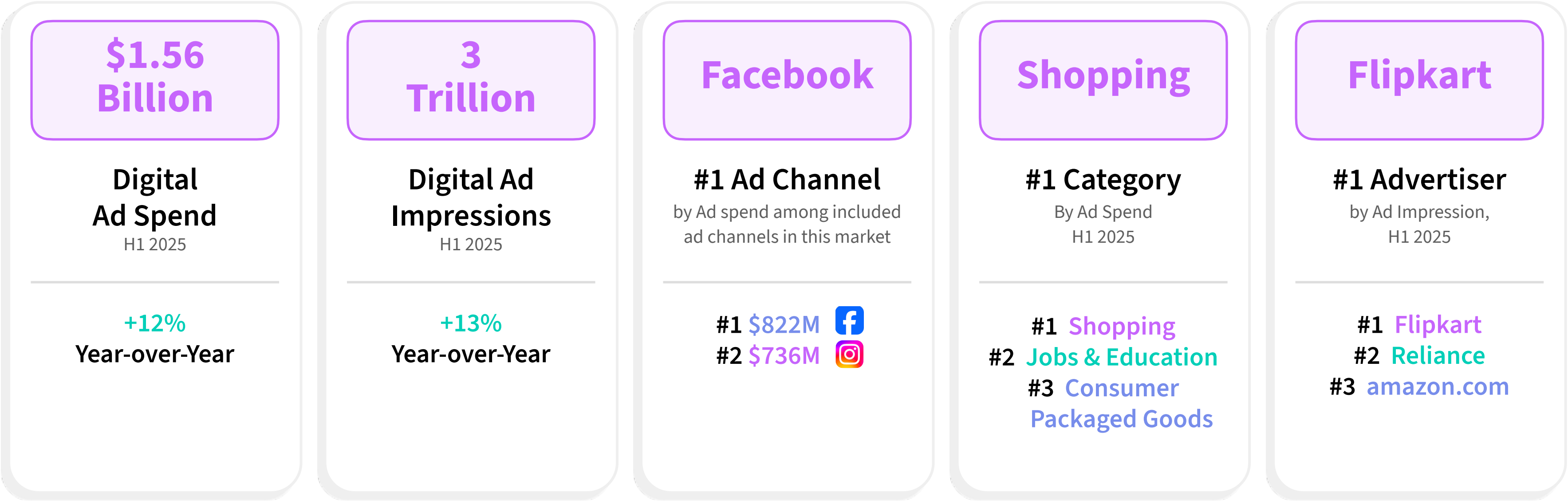
India Digital Advertising
Overview

Total Digital Advertising Spend in India Reached $1.56 Billion in H1 2025

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook and Instagram, covering the period from January to June 2025. Ad spend estimates as of July 30, 2025.
General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

Included Ad Channels

| $1.56 Billion	3 Trillion	Facebook	Shopping	Flipkart
Digital Ad Spend	Digital Ad Impressions	#1 Ad Channel	#1 Category	#1 Advertiser
H1 2025	H1 2025	by Ad spend among included ad channels in this market	By Ad Spend H1 2025	by Ad Impression, H1 2025
+12% Year-over-Year	+13% Year-over-Year	#1 $822M #2 $736M	#1 Shopping #2 Jobs & Education #3 Consumer Packaged Goods	#1 Flipkart #2 Reliance #3 amazon.com

Digital Ad Spend and Impressions on Facebook and Instagram Continued to Rise in India in H1 2025

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook and Instagram, covering the period from January to June 2025.

From January to June 2025, digital ad spend on Facebook and Instagram showed a notable upward trend, peaking at nearly $280 million in May. This peak was nearly 1.2 times higher than the period's low point in February. Throughout the first half of the year, both Facebook and Instagram exhibited comparable growth trajectories.

In the first half of 2025, Facebook achieved a massive reach, accumulating nearly 1.6 trillion impressions. This volume slightly outpaced the 1.4 trillion impressions generated on Instagram during the same period, highlighting Facebook's continued leadership in overall market visibility.
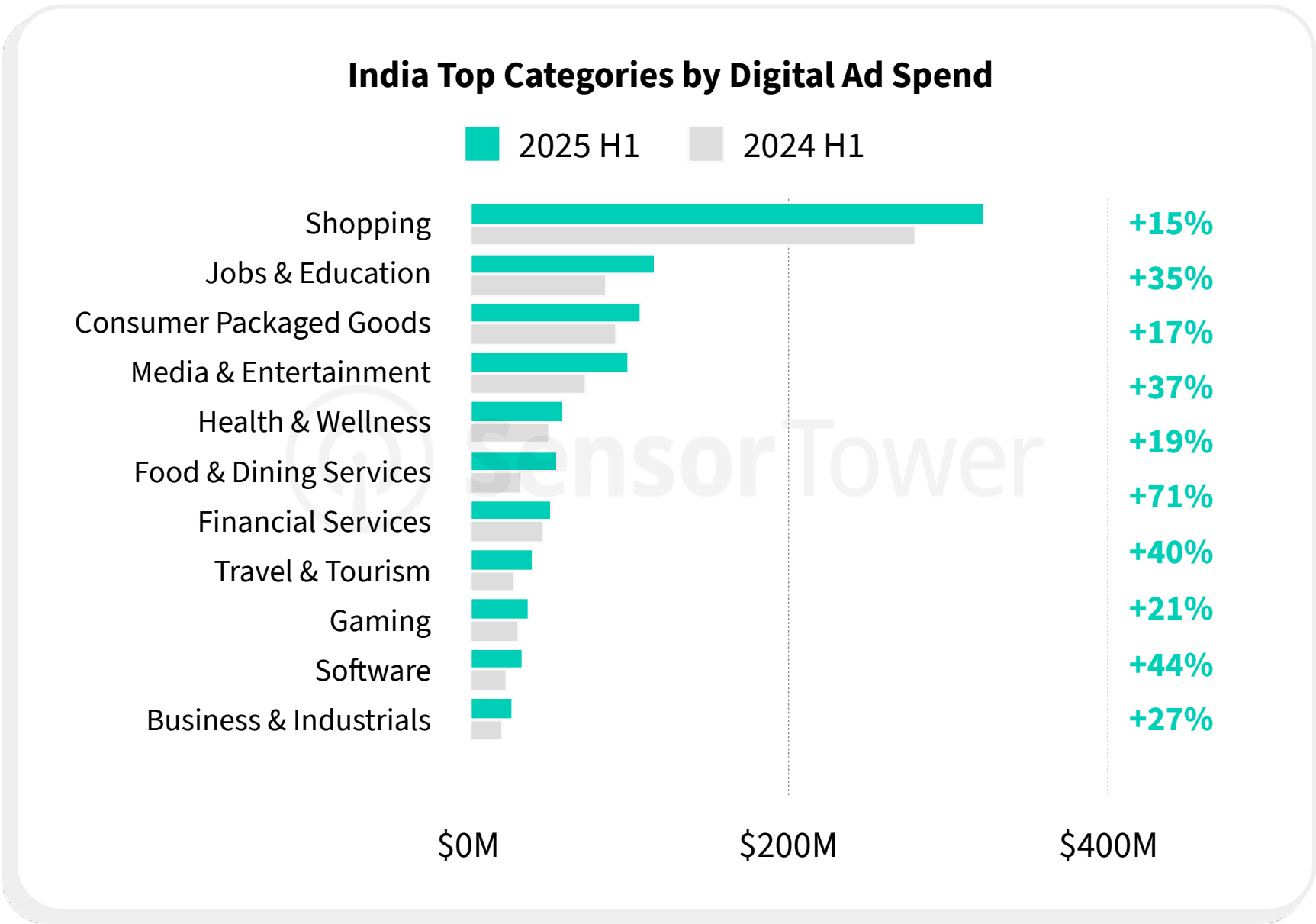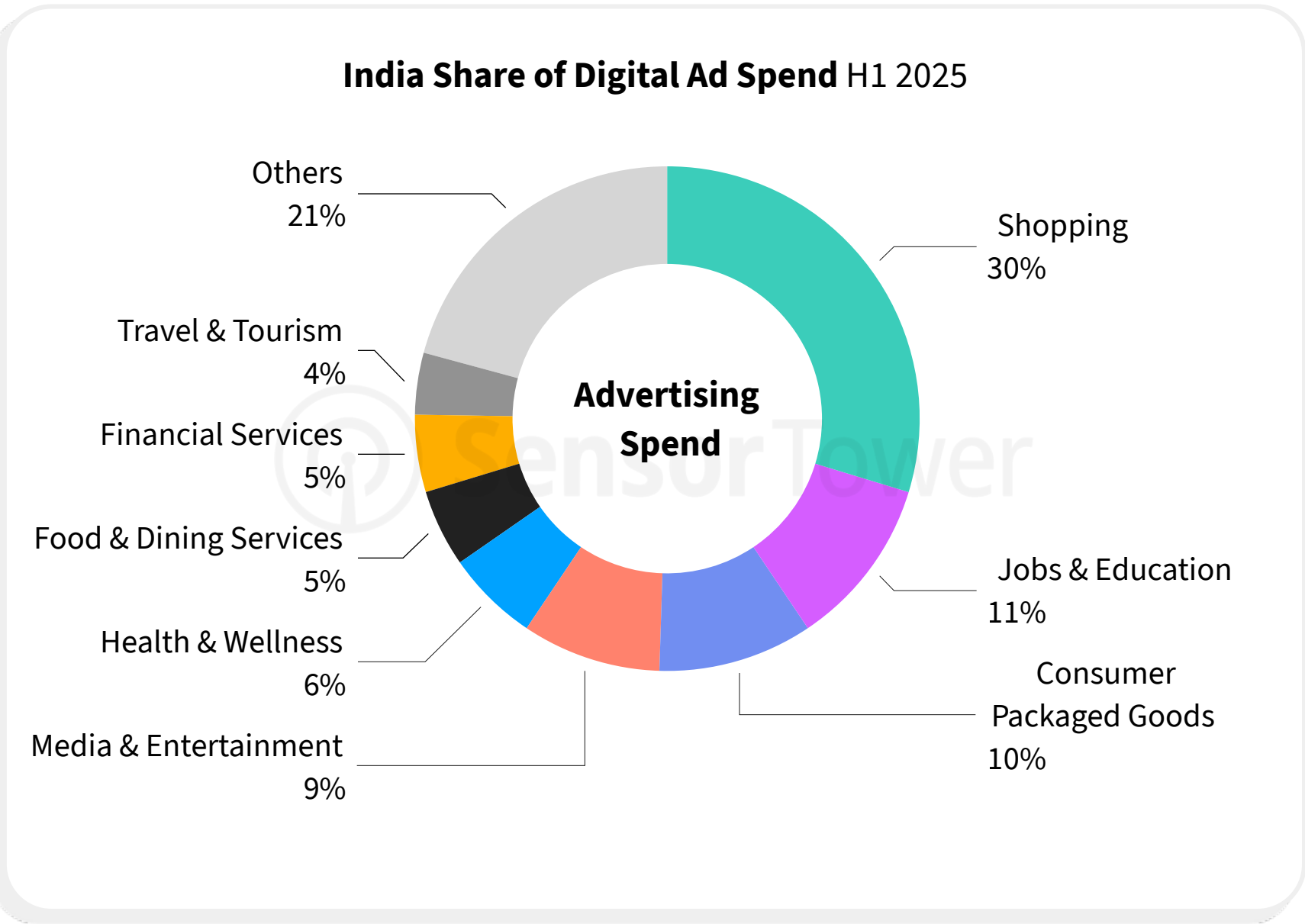

Monthly Digital Ad Spend by Ad Channels

Monthly Digital Ad Impressions by Ad Channels
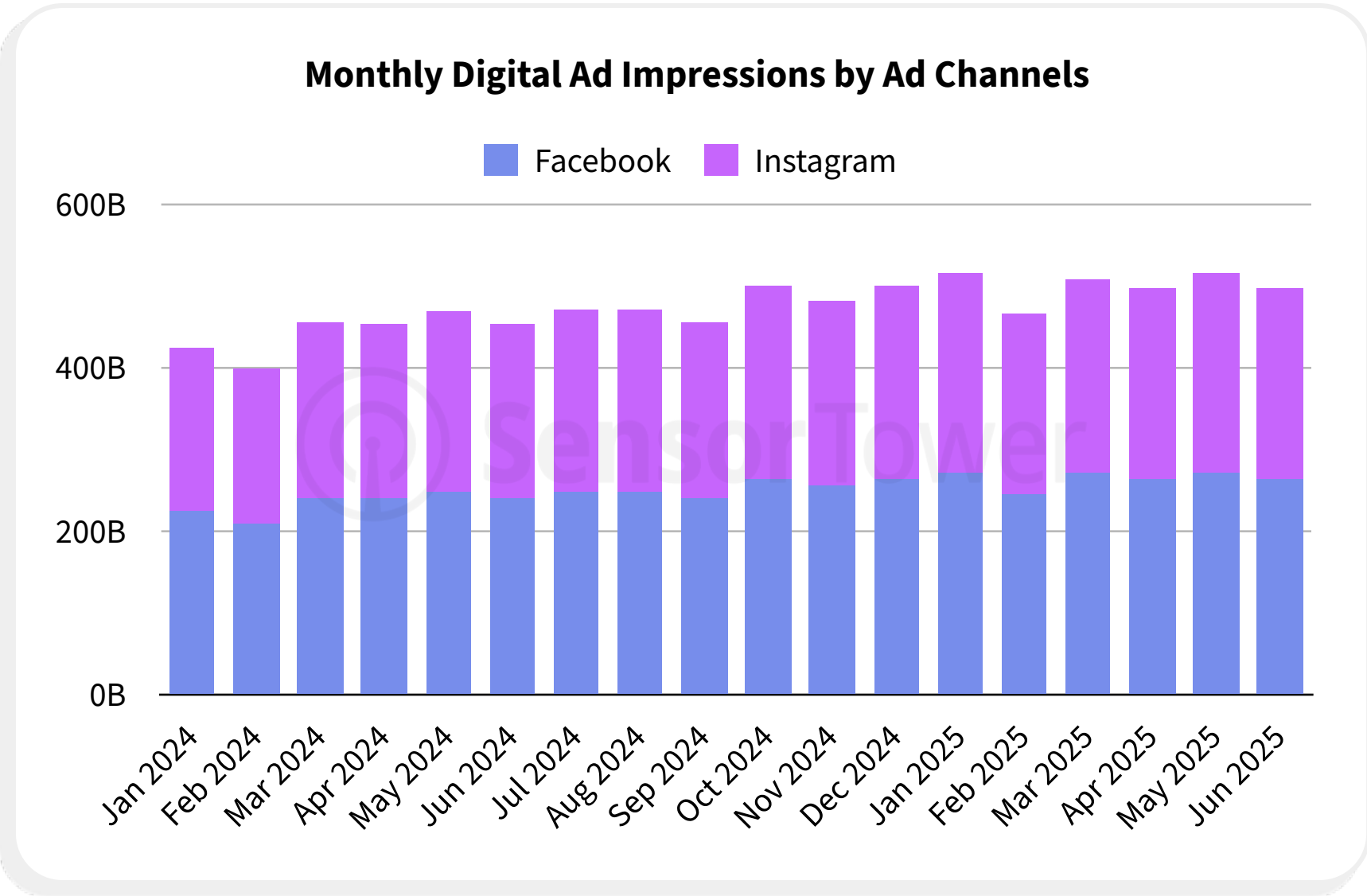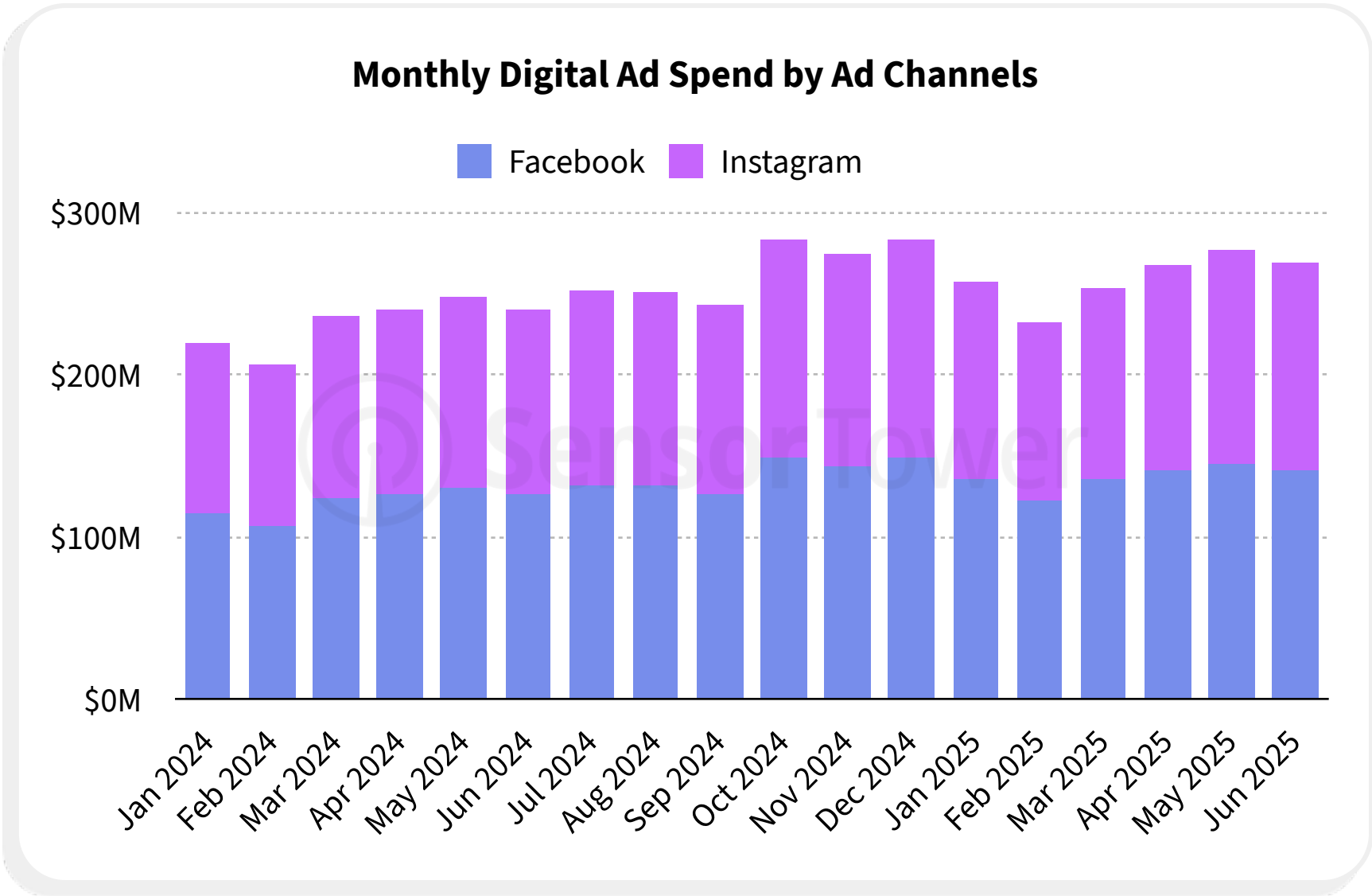
Which Categories are Driving Digital Advertising Growth In India?

The Shopping category overwhelmingly dominates India's digital ad spend with a 30% share, nearly three times that of the next largest sectors, Jobs & Education (11%) and Consumer Packaged Goods (10%). Other major categories like Media & Entertainment and Financial Services command a smaller, single-digit share.

While Shopping remains the top category by total ad spend in H1 2025 with 15% YoY growth, other sectors are expanding much faster. The Food & Dining Services category saw the highest growth at 71%, followed by Software (+44%) and Travel & Tourism(+40%).

India Share of Digital Ad Spend H1 2025

Advertising Spend

- Others 21%
- Travel & Tourism 4%
- Financial Services 5%
- Food & Dining Services 5%
- Health & Wellness 6%
- Media & Entertainment 9%
- Shopping 30%
- Jobs & Education 11%
- Consumer Packaged Goods 10%

India Top Categories by Digital Ad Spend

■ 2025 H1   ■ 2024 H1

Category	Growth
Shopping	+15%
Jobs & Education	+35%
Consumer Packaged Goods	+17%
Media & Entertainment	+37%
Health & Wellness	+19%
Food & Dining Services	+71%
Financial Services	+40%
Travel & Tourism	+21%
Gaming	+21%
Software	+44%
Business & Industrials	+27%

$0M $200M $400M

See Which India Advertisers Made the Biggest Engagement in 2025

E-commerce giants overwhelmingly led the charge for engagement in the first half of 2025. Flipkart Internet, Reliance Retail, and Amazon.com secured the top three ranks respectively, showcasing their massive investment in digital visibility. Their dominance highlights a fierce, ongoing battle for market share and consumer attention within India's highly competitive online shopping sector.

Beyond the top three, the list reveals a diverse and dynamic digital landscape. Food-tech rivals Zomato (by Eternal Limited) and Swiggy both featured in the top ten, alongside specialized apparel and beauty retailers Myntra and Nykaa. The presence of a CPG leader like Unilever and digital natives like Kuku FM and Sporta Technologies underscores the broad range of industries now vying for massive digital engagement.

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook and Instagram, covering the period from January to June 2025.

India Top Advertisers by Impressions
H1 2025

Rank By Impressions		Advertiser	Key Category
1		Flipkart Internet Private Limited	Shopping
2		Reliance Retail Ltd.	Shopping
3		Amazon.com	Shopping
4		Eternal Limited	Dining Listings, Reviews & Reservations
5		Myntra.com	Apparel
6		Nykaa E-Retail Private Limited	Beauty Retail
7		Unilever	Consumer Packaged Goods
8		Swiggy Limited	Restaurant Ordering & Delivery
9		Kuku FM (Mebigo Labs Private Limited)	Music & Podcasts
10		Sporta Technologies Private Limited	Fantasy Sports

Market Trend Spotlight
India Festive Season

India Festive Season Advertising Starts Early with Ad Spend Spiking in October

Digital ad spend in India consistently follows a seasonal pattern, with a significant ramp-up ahead of the main festive season. The 2024 trend illustrates this clearly, showing relatively stable spending for most of the year before a sharp spike begins in October, indicating the start of major festive campaigns.

This trend is poised to intensify in 2025. Ad spend in the first half of the year has already outpaced 2024 levels, and forecasts predict a more pronounced festive surge. The projected sharp increase beginning in October is expected to push monthly spending towards the $250 million mark, signaling a record-breaking holiday season.

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook and Instagram, covering the period from January 2024 to June 2025.

India Monthly Digital Ad Spend Trends and Forecast

— 2024 — 2025 -- 2025F
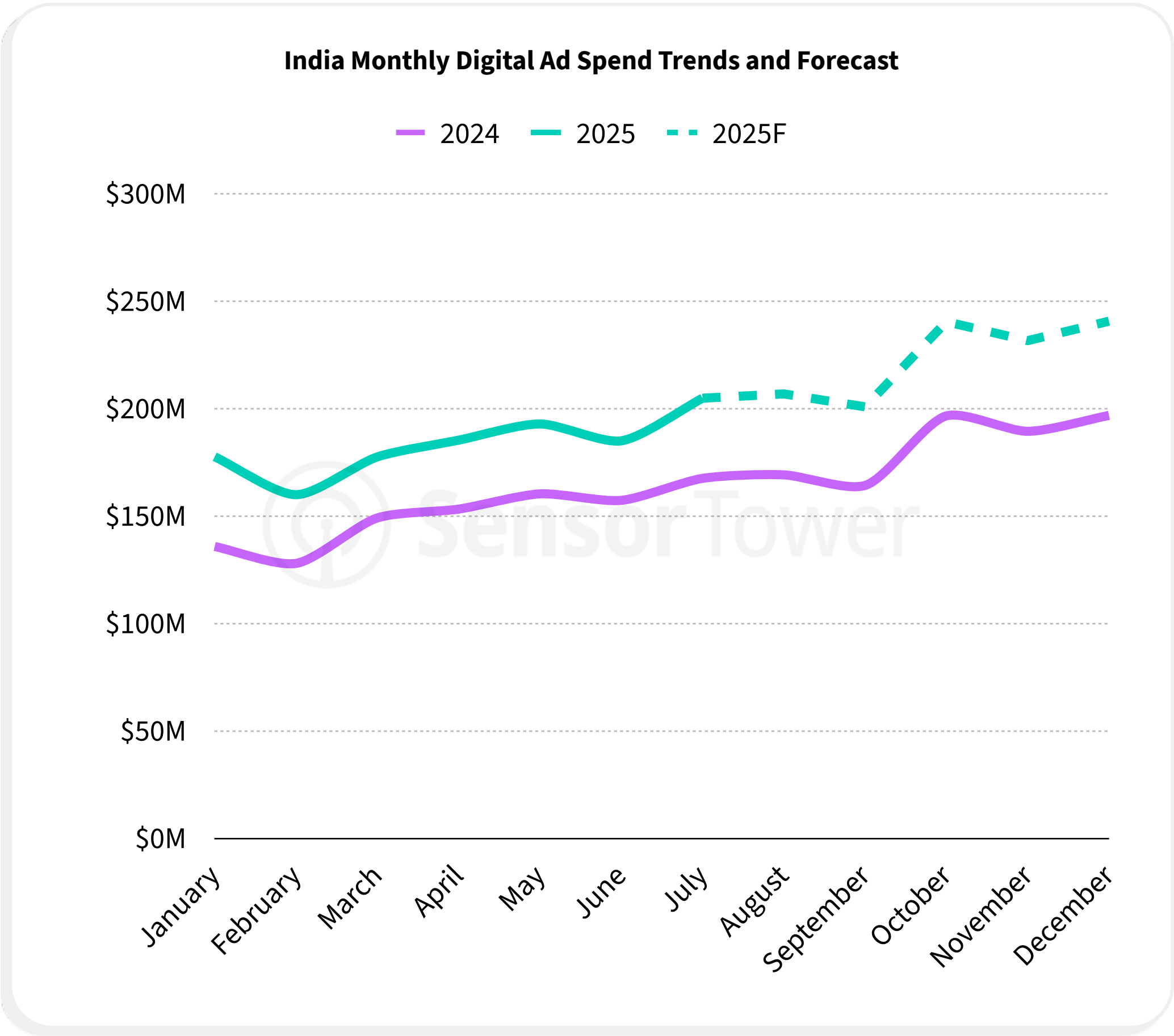
Discover Which Subcategories Make the Biggest Push During the Festive Season

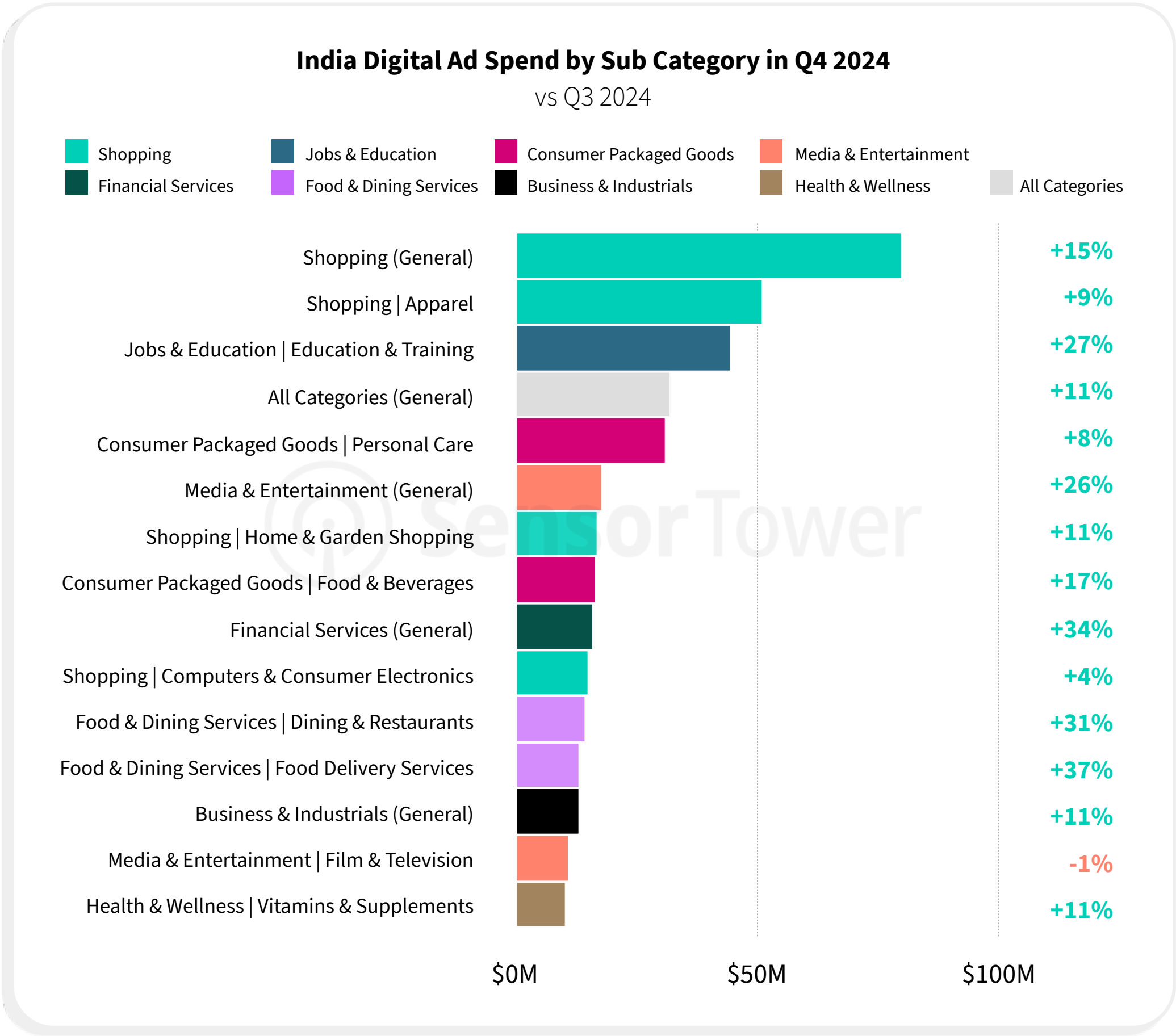During the Q4 festive season, the Shopping category makes the most significant push in terms of absolute ad spend. The general Shopping subcategory leads all others with around $80 million in spending, followed by Apparel at approximately $50 million, clearly dominating the digital advertising landscape.

However, the most aggressive festive push, when measured by quarter-over-quarter growth, comes from other sectors. Food Delivery Services saw the highest increase at +37%, followed closely by Financial Services at +34%. This indicates these subcategories strategically intensify their advertising to capitalize on specific festive season behaviors.

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook and Instagram, covering the period from July to December 2024.

India Digital Ad Spend by Sub Category in Q4 2024
vs Q3 2024

Legend:
- Shopping
- Financial Services
- Jobs & Education
- Food & Dining Services
- Consumer Packaged Goods
- Business & Industrials
- Media & Entertainment
- Health & Wellness
- All Categories

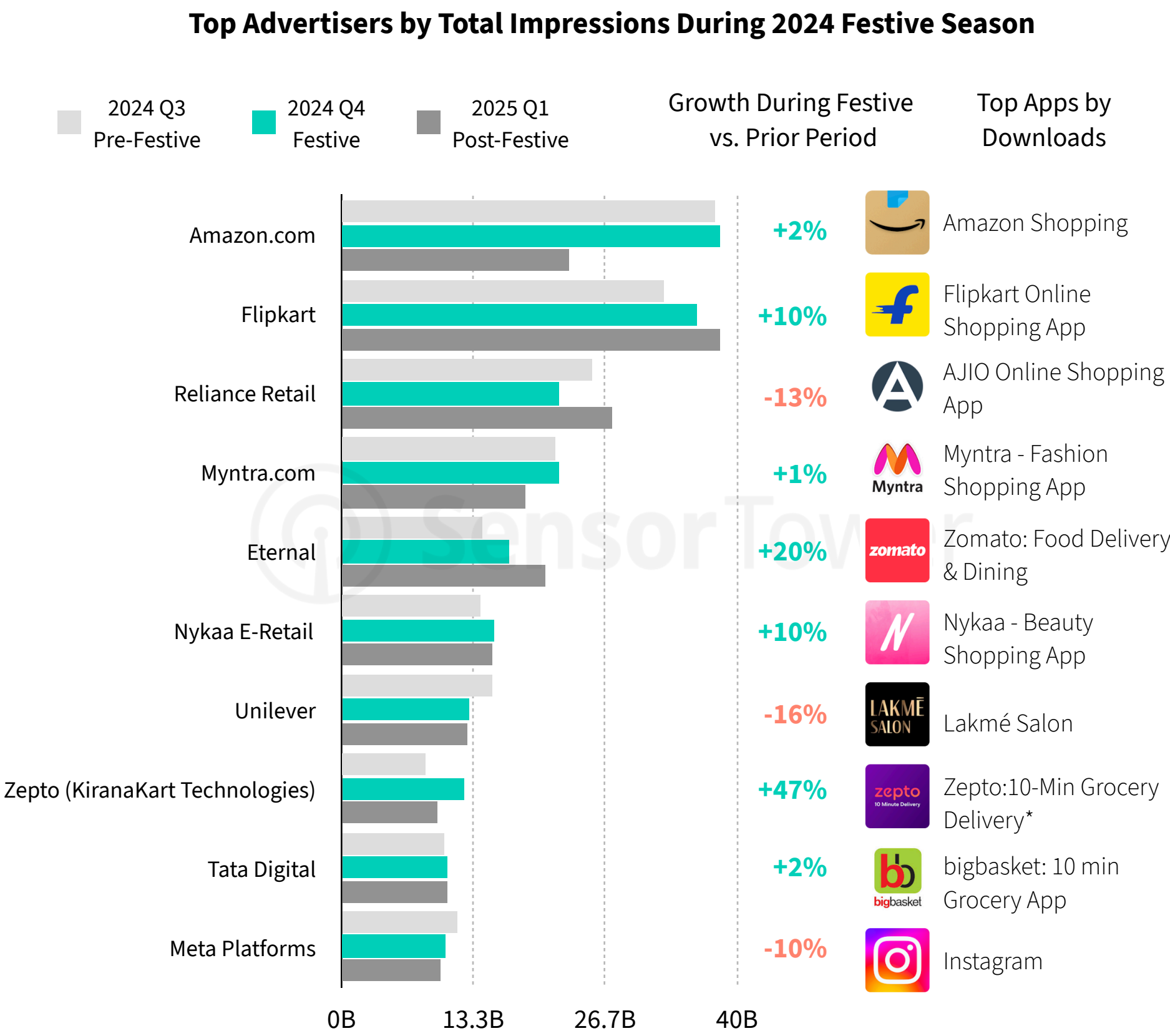| Subcategory	Growth
Shopping (General)	+15%
Shopping	Apparel	+9%
Jobs & Education	Education & Training	+27%
All Categories (General)	+11%
Consumer Packaged Goods	Personal Care	+8%
Media & Entertainment (General)	+26%
Shopping	Home & Garden Shopping	+11%
Consumer Packaged Goods	Food & Beverages	+17%
Financial Services (General)	+34%
Shopping	Computers & Consumer Electronics	+4%
Food & Dining Services	Dining & Restaurants	+31%
Food & Dining Services	Food Delivery Services	+37%
Business & Industrials (General)	+11%
Media & Entertainment	Film & Television	-1%
Health & Wellness	Vitamins & Supplements	+11%

See Which Advertisers in India Made the Biggest Splash for Festive Season

During the 2024 festive season, e-commerce titans Amazon and Flipkart dominated with the highest impression volumes to win consumer mindshare. However, the biggest growth momentum came from quick-commerce and food delivery, where Zepto surged by 47% from the prior period, and Zomato's parent, Eternal, grew by 20%.

The post-festive period in Q1 2025 revealed diverging strategies. Notably, Flipkart and Reliance Retail continued to grow their impression volume, suggesting a push to sustain momentum year-round. In contrast, other advertisers like Amazon and the seasonal sprinter Zepto scaled back their campaigns, indicating a focus on a concentrated burst specifically for the festive window.

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook and Instagram, covering the period from July to December 2024.

Top Advertisers by Total Impressions During 2024 Festive Season

Legend:
- 2024 Q3 Pre-Festive
- 2024 Q4 Festive
- 2025 Q1 Post-Festive

Advertiser	Growth During Festive vs. Prior Period	Top Apps by Downloads
Amazon.com	+2%	Amazon Shopping
Flipkart	+10%	Flipkart Online Shopping App
Reliance Retail	-13%	AJIO Online Shopping App
Myntra.com	+1%	Myntra - Fashion Shopping App
Eternal	+20%	Zomato: Food Delivery & Dining
Nykaa E-Retail	+10%	Nykaa - Beauty Shopping App
Unilever	-16%	Lakmé Salon
Zepto (KiranaKart Technologies)	+47%	Zepto:10-Min Grocery Delivery*
Tata Digital	+2%	bigbasket: 10 min Grocery App
Meta Platforms	-10%	Instagram

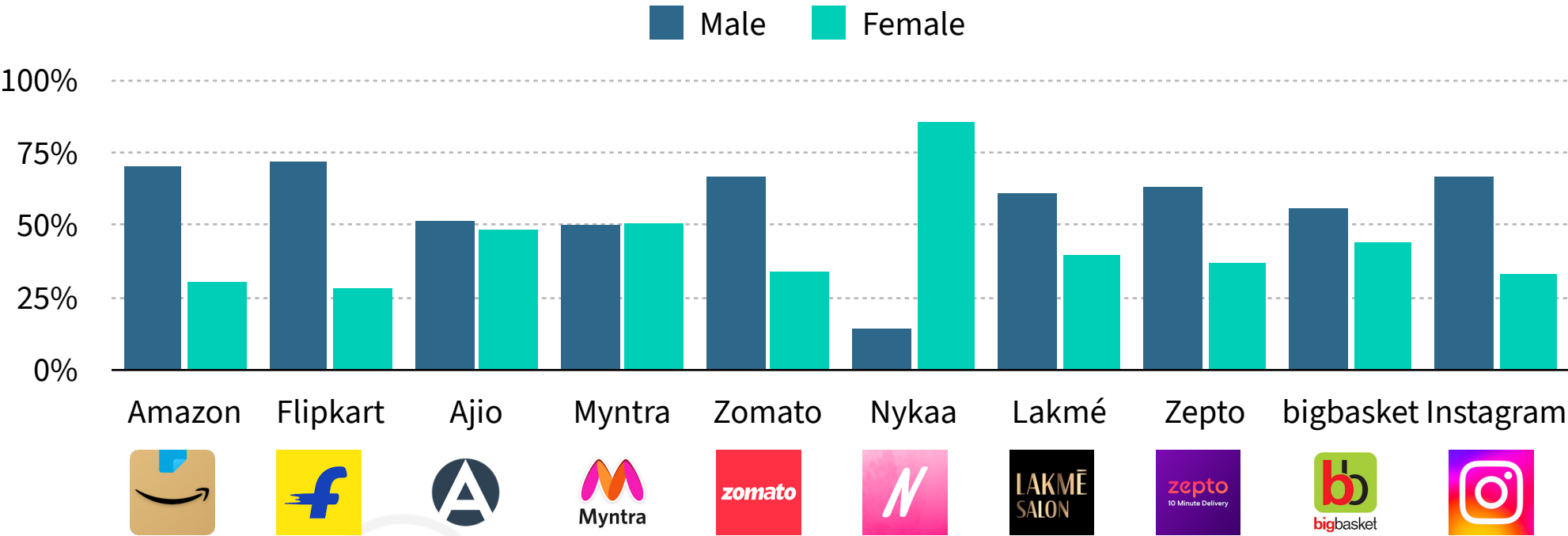Chart x-axis: 0B, 13.3B, 26.7B, 40B

Unpacking the Festive Shopper: A Demographic Profile of Key Apps in India

Beauty retailer Nykaa shows an overwhelmingly female audience, while fashion app Myntra also skews female. In stark contrast, major e-commerce and quick-commerce platforms like Flipkart and Amazon attract a predominantly male user base.
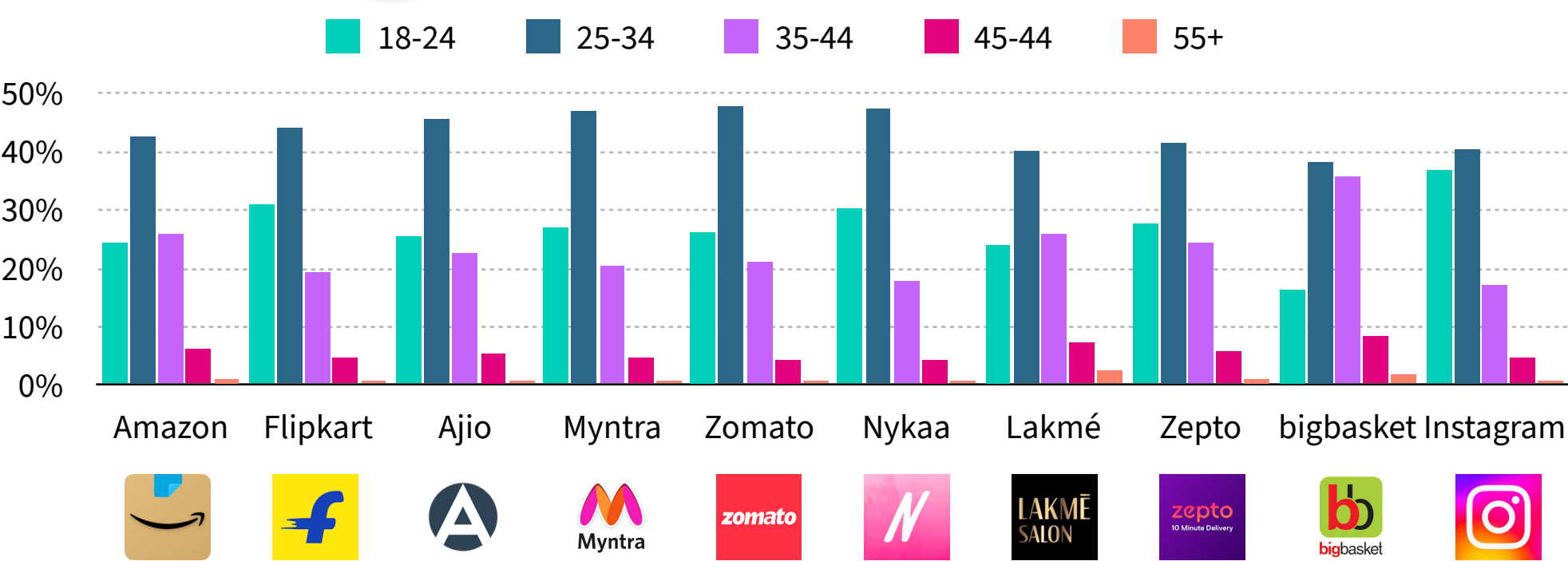
Age is another critical factor, with the audience in India being predominantly young. The 18-24 and 25-34 age brackets form the core user base for most platforms, with Instagram and Nykaa showing a particularly strong concentration of younger users. A notable exception is bigbasket, which attracts a comparatively older demographic than its quick-commerce rivals.

Source: Sensor Tower Audience Insights

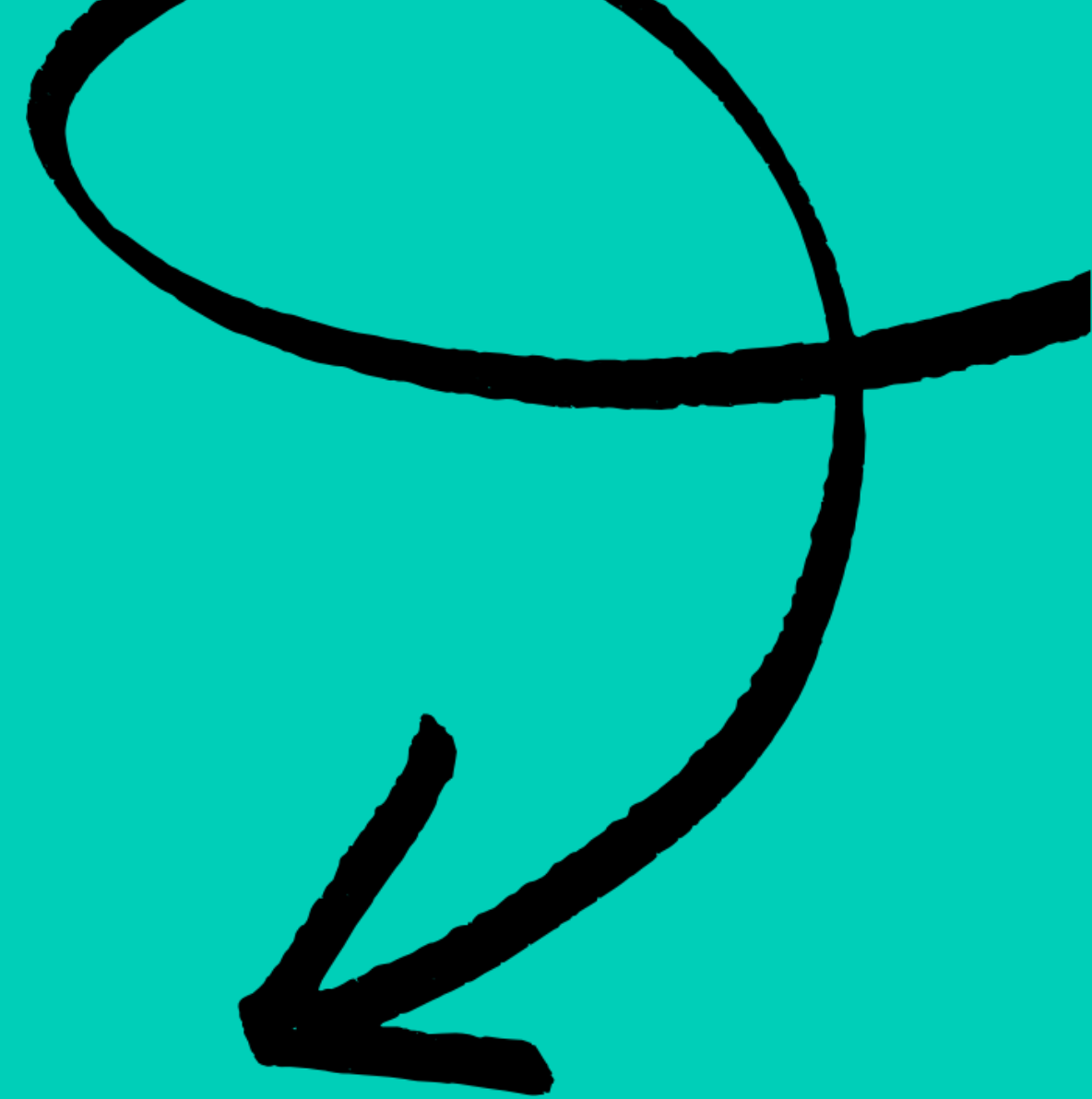## Gender Distribution Among Select Apps During Q4 2024 Festive Season

Legend: Male, Female. Apps: Amazon, Flipkart, Ajio, Myntra, Zomato, Nykaa, Lakmé, Zepto, bigbasket, Instagram

Age Distribution Among Select Apps During Q4 2024 Festive Season

Legend: 18-24, 25-34, 35-44, 45-44, 55+. Apps: Amazon, Flipkart, Ajio, Myntra, Zomato, Nykaa, Lakmé, Zepto, bigbasket, Instagram

Case Study
Advertising Insights from India Shopping Brands

Nykaa - Beauty Shopping App

Data Source: Sensor Tower App Performance Insights as of July 30, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China.

Since its launch, Nykaa has become India's go-to online beauty destination. Central to its experience is the mobile app, which sources directly from hundreds of partner brands to guarantee authenticity and offers a vast catalog, meeting the diverse makeup, skincare, and wellness needs of men and women.

Nykaa Quarterly Downloads and Total Cumulative Downloads
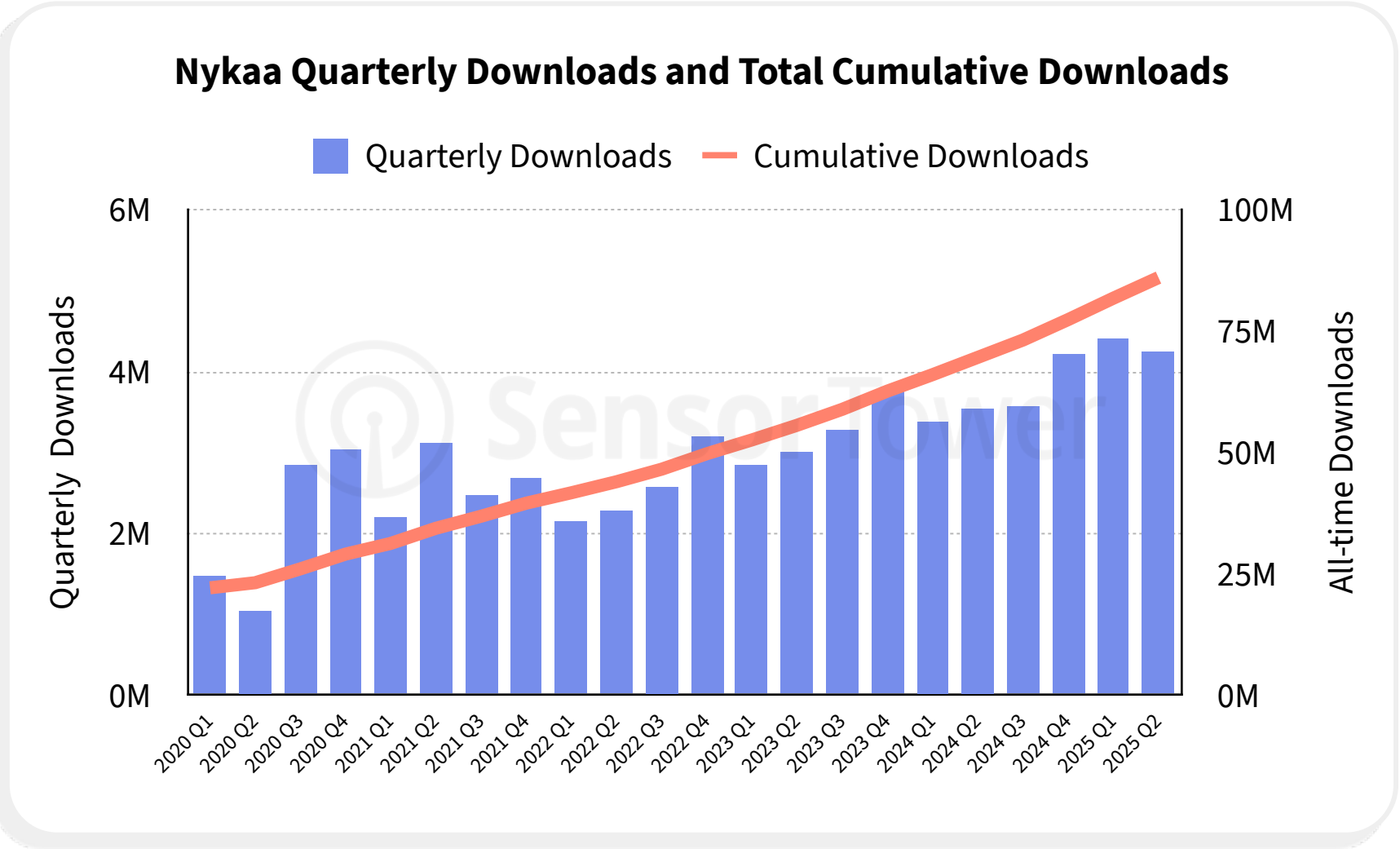
Creative Gallery for Nykaa India

Nykaa demonstrates powerful momentum in India, becoming the top downloaded Beauty Retail app in H1 2025. Fueled by strong quarterly performance, it is on track to surpass 100 million cumulative downloads across iOS and Google Play, solidifying its dominant position in the digital beauty market.

Nykaa engages Indian shoppers with a continuous calendar of themed sales. By anchoring promotions to key cultural festivals like Diwali alongside global and behavioral events, it creates constant urgency. Layered offers like exclusive member discounts and daily deals ensure consumers have a compelling reason to return to the platform frequently.

Myntra - Fashion Shopping App

Rolled out in 2014, the Myntra Mobile App has become a premier fashion shopping destination in India. Beyond its vast collection of brands and styles, it integrates unique features like Myntra Move, a program that rewards users' daily steps with shopping benefits, innovatively blending fitness with fashion for a more engaging experience.

Myntra Total Impressions and Channel Breakdown
Total Channel Impressions

Legend: Facebook, Instagram, Snapchat, Reddit, Pinterest

Creative Gallery for Myntra India
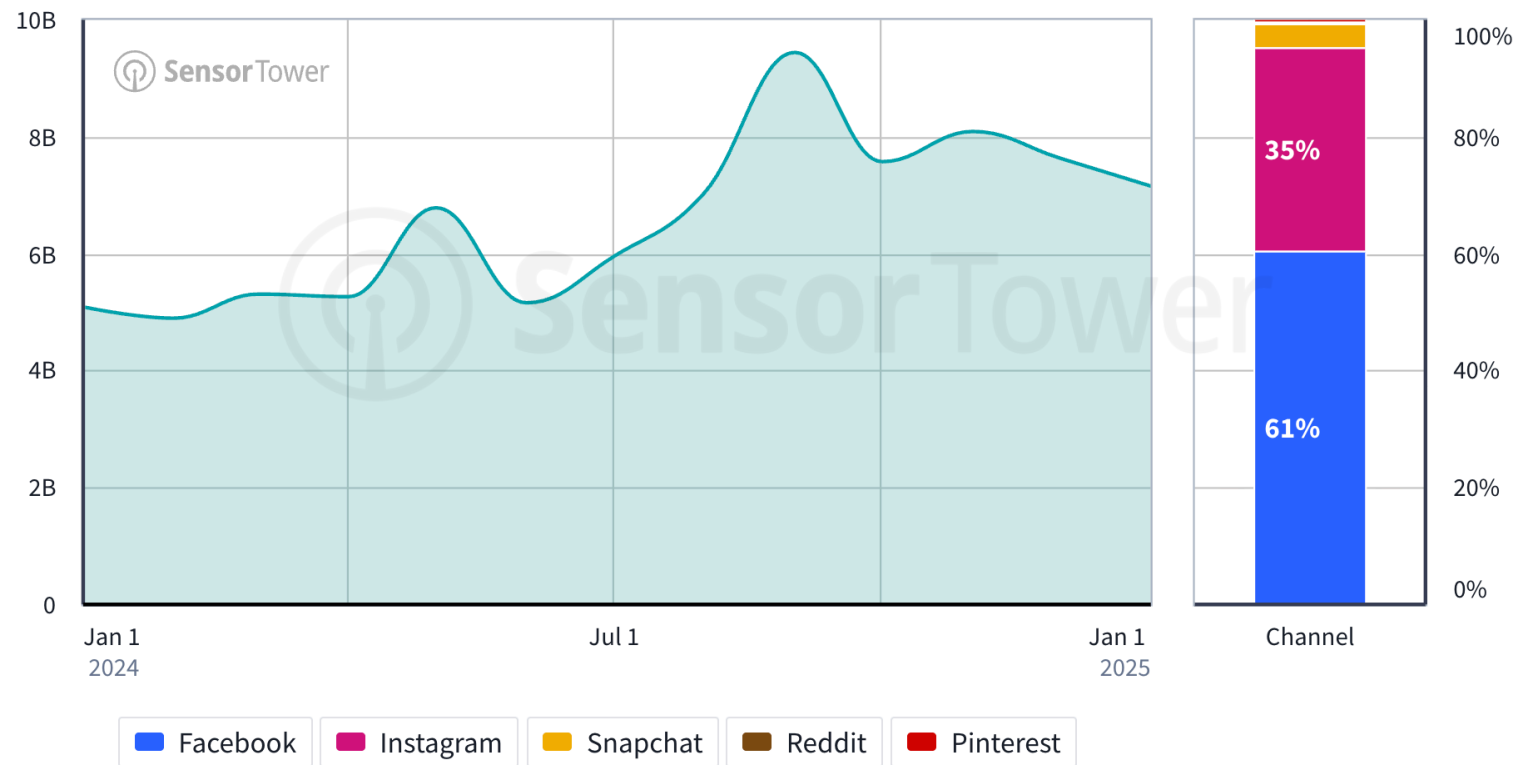
Myntra's ad strategy targets India's festive seasons, with impressions spiking to nearly 10 billion during the 2024 Diwali period to capture consumer spending. This investment is highly concentrated on Meta platforms, with Facebook (61%) and Instagram (35%) overwhelmingly dominating its advertising channel mix and digital reach.
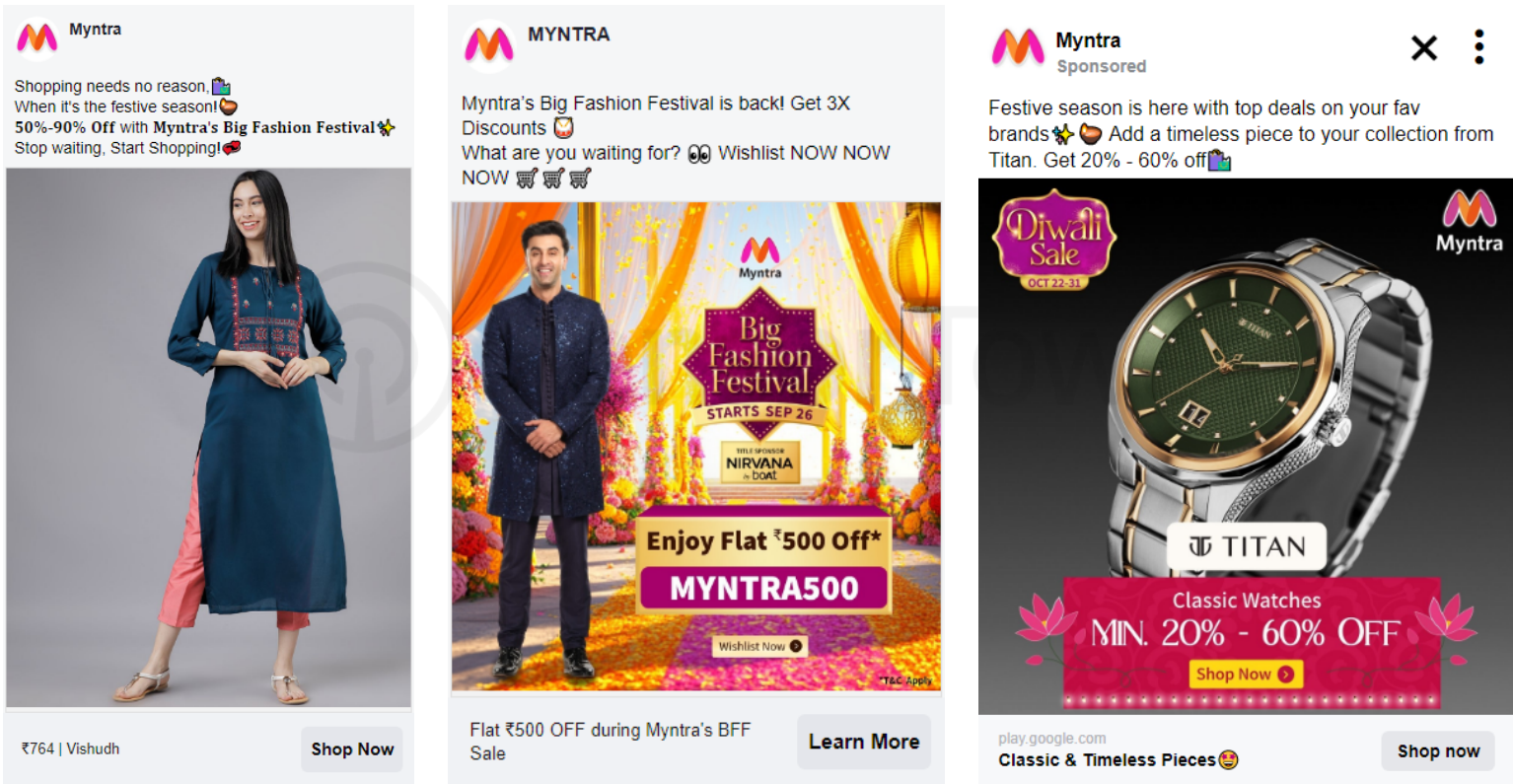
Myntra's creative strategy uses a multi-faceted approach for major events like its "Big Fashion Festival." It builds hype with celebrity endorsements while simultaneously running targeted ads for specific products and brand partners like Titan. A key engagement hook is the "Wishlist NOW" call-to-action, driving pre-sale interaction.
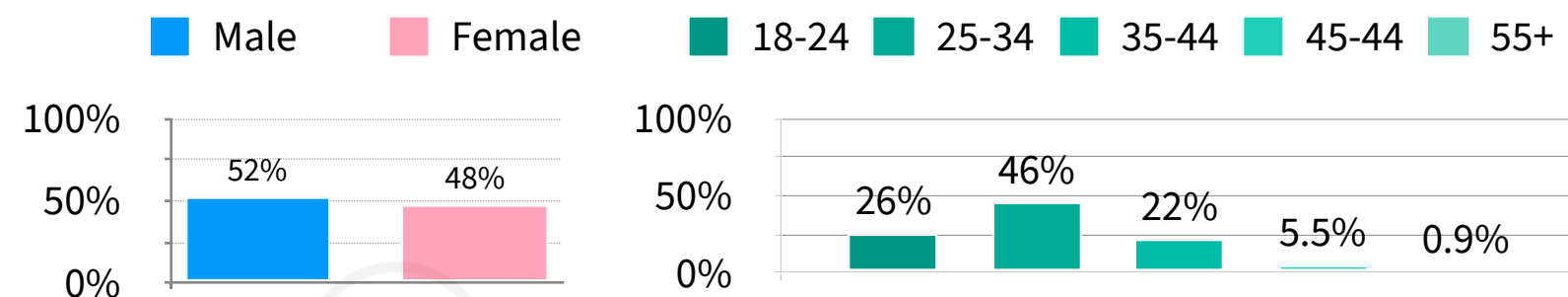
AJIO Online Shopping App

Launched in 2016, AJIO is a fashion and lifestyle platform defined by its curated collections. Its unique features include offering exclusive international brands not found elsewhere in India and a dedicated "Indie" collection that supports local artisans, blending traditional crafts with contemporary fashion for a distinctive offering.

## AJIO Audience Overview and Personas H1 2025 India

Legend: Male | Female | 18-24 | 25-34 | 35-44 | 45-44 | 55+

Gender chart:
- Male: 52%
- Female: 48%

Age chart:
- 26%
- 46%
- 22%
- 5.5%
- 0.9%

AJIO Audience vs. General Population % Difference

Persona	Value
Fashionistas	7.18x
Sneakerheads	4.66x
Shopaholics	4.59x
Latte Lovers	3.11x
Delivery Diners	3.00x
Home Cooks	2.96x
Fine Diners	2.81x

(x-axis: 0, 2, 4, 6, 8)

Creative Gallery for AJIO India
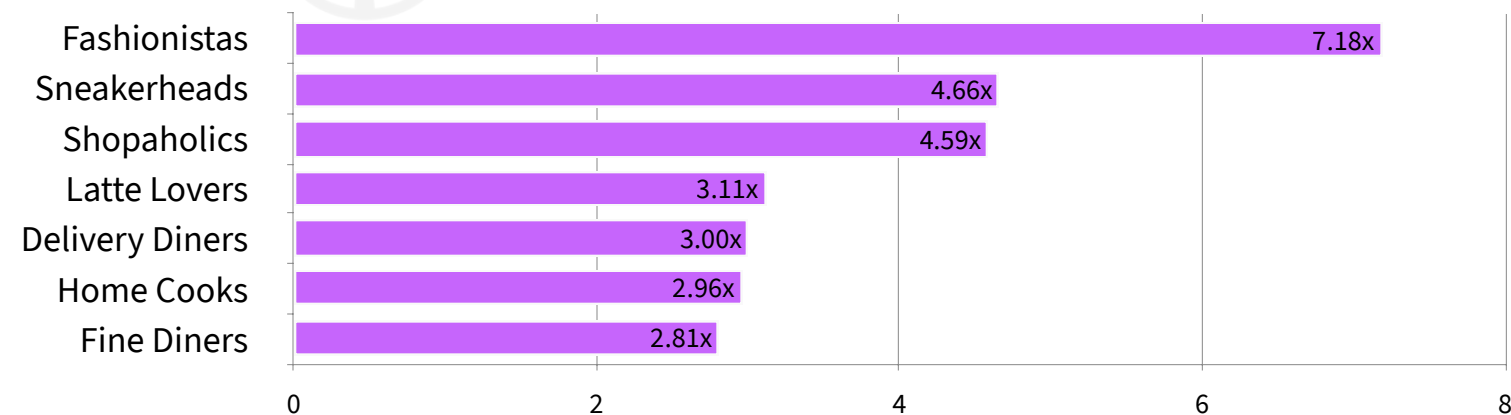
AJIO's user base skews young and is nearly balanced in gender, with 52% male users and 72% of the audience under age 35. This suggests strong appeal among digitally savvy, style-conscious consumers in India, particularly the 25–34 age group, which constitutes nearly half of the app's user base.
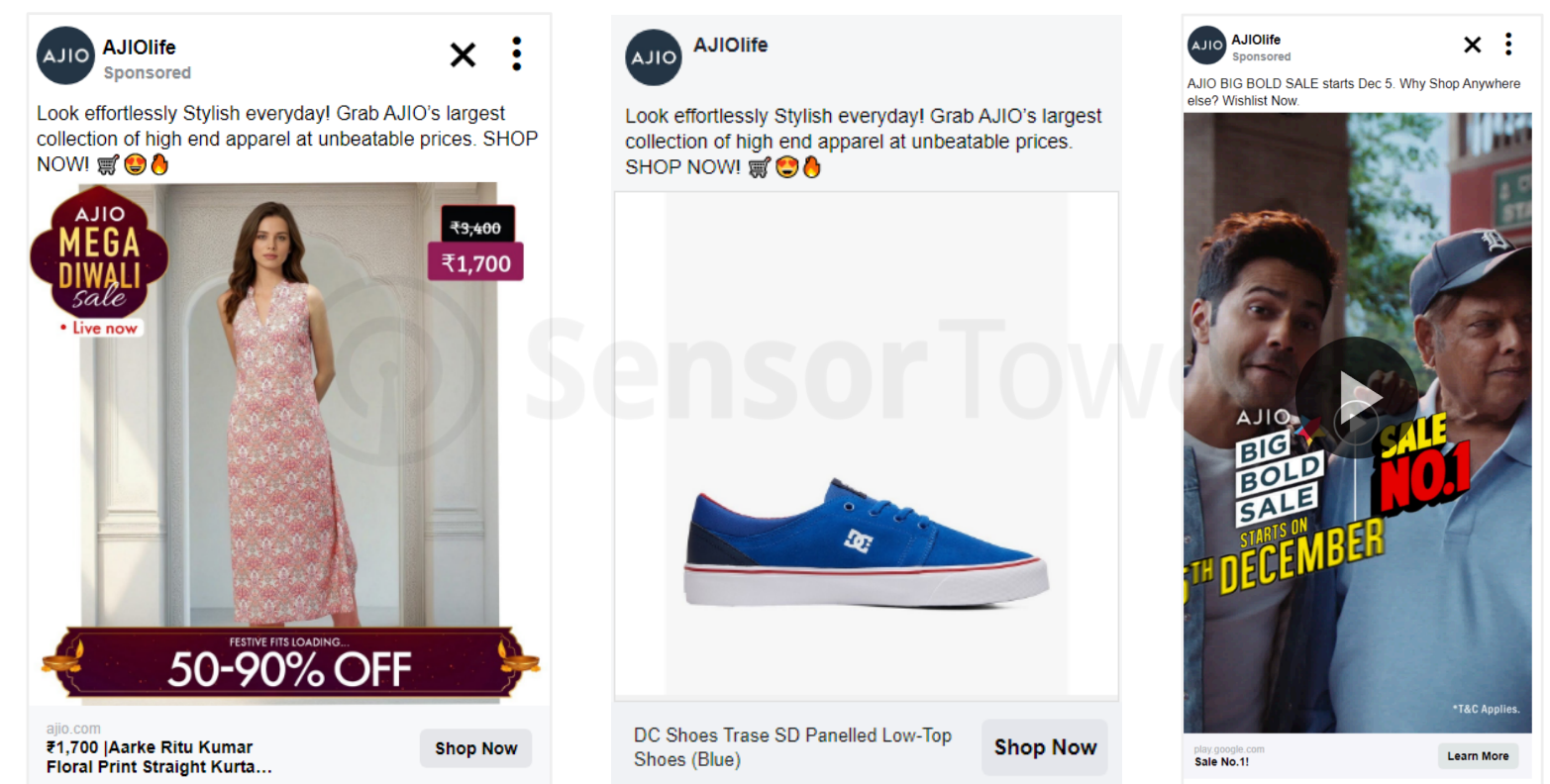
AJIO's creative strategy **directly targets its young, fashion-forward demographic.** It uses **celebrity-led campaigns for broad appeal**, while running highly-targeted ads featuring specific products like sneakers for its "Sneakerhead" persona and trendy ethnic wear for "Fashionistas" during festive sales, ensuring maximum relevance and engagement.

Conclusion

1

E-commerce Titans Define India's Digital Ad Landscape

India's digital advertising market demonstrated significant scale in the first half of 2025, with total ad spend reaching $1.56 billion and generating 3 trillion ad impressions. Facebook led as the primary ad channel by spend. The market is heavily influenced by e-commerce, with Shopping being the top spending category at a 30% share and Flipkart ranking as the #1 advertiser by impressions.

2

Festive Season Sparks Predictable Ad Spend Surge

India's digital ad spend follows a distinct seasonal pattern, consistently spiking in Q4 ahead of the festive season. This trend is forecasted to intensify, with spending projected to hit new highs in late 2025. While Shopping dominates in absolute spending during this period , the most aggressive growth comes from sectors like Food Delivery (+37%) and Financial Services (+34%).

3

Growth Momentum Shifts to Niche and Quick-Commerce

While e-commerce titans lead in volume, the greatest growth momentum is found in specialized and quick-commerce sectors. During the 2024 festive season, Zepto demonstrated this with an explosive 47% increase in impressions, followed by Zomato's 20% growth. This highlights a dynamic shift where convenience and specialized services are becoming key battlegrounds for digital engagement.

4

Targeted Demographics Define Winning Strategies

A deep understanding of demography is central to effective advertising strategy in India. The stark contrast between Nykaa's heavily female-skewed audience and the male-dominated user bases of Flipkart and Amazon reveals highly targeted approaches. Similarly, while most app users are young , outliers like bigbasket successfully appeal to a comparatively older demographic.
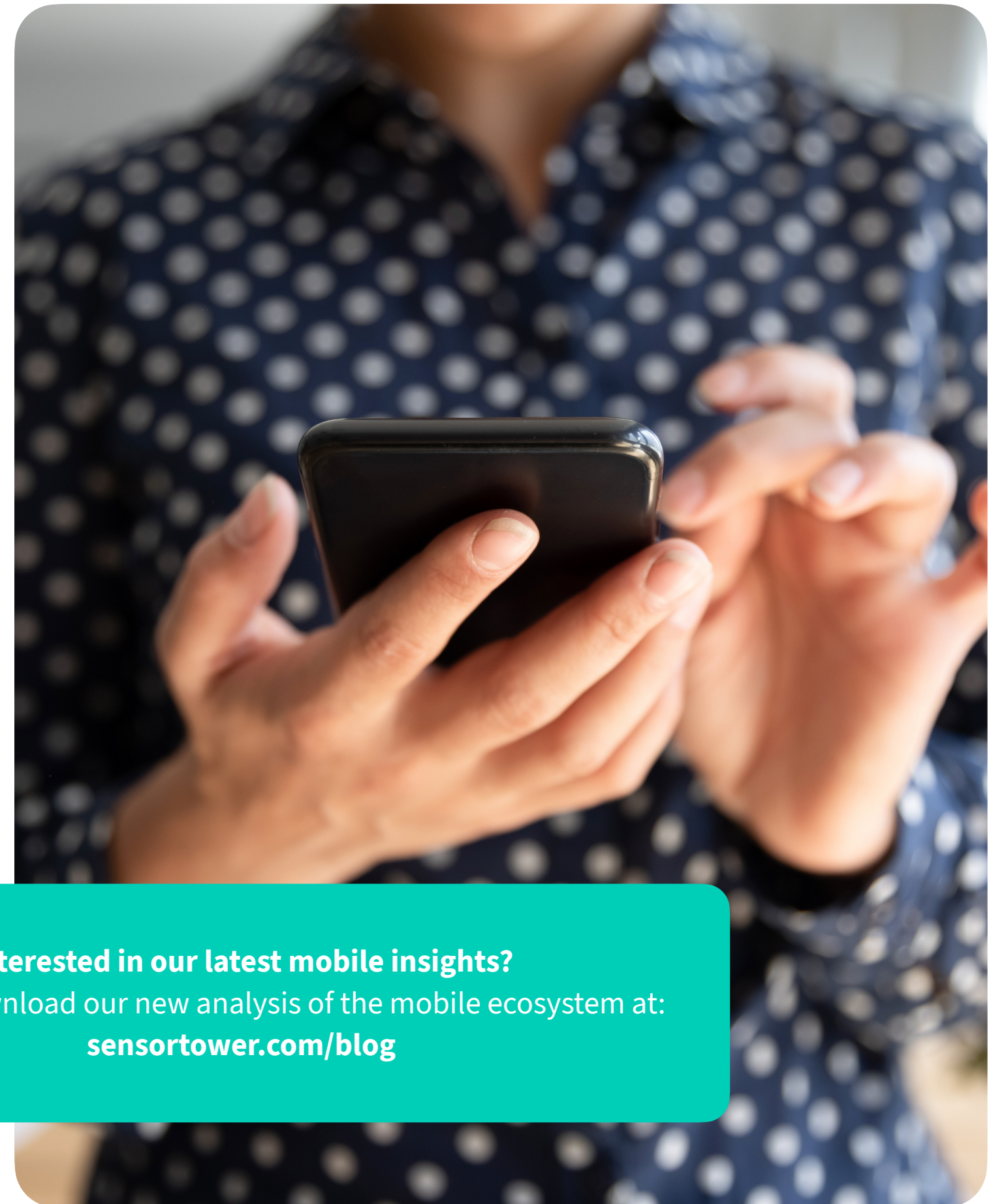
Sensor Tower
Terms of Use

This report and all original content contained within are wholly owned by Sensor Tower, Inc. © 2025. Modification, republication, distribution, or other unauthorized usage violate this copyright, unless express permission has been granted. App icons, images, and other branding assets are property of their respective publishers and are used expressly for the purpose of editorial commentary. If you would like to republish any of the data contained in this report, please email info@sensortower.com for further information on how to do so. We're always happy to work with news organizations to provide custom data, insights and commentary.

Contact **press-apac@sensortower.com** for help.

Interested in our latest mobile insights?
Read and download our new analysis of the mobile ecosystem at:
sensortower.com/blog

Sensor Tower
APAC Insights Team

Author

Donny Kristianto
Principal Market Insights Manager
Singapore

Contributor

Hideyuki Tsuji
Insights Strategist
Tokyo

Contributor

Rui Ma
Senior Analyst, APAC
Hubei

Contributor

Nan Lu
VP of Marketing, APAC
San Francisco

Contributor

Daniel Zhang
Field Marketing Manager, GCR
Beijing

Contributor

Sara Tan
Marketing Operations, APAC
Singapore

Contributor

Yena You
Insights Strategist
Seoul

Sensor Tower
About us

Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.

Los Angeles
3840 Watseka Ave
Culver City,
CA 90232
United States

New York City
WeWork
33 Irving Place
9th Floor,
#9031 New York,
NY 10023
United States

San Francisco
44 Montgomery St
San Francisco,
CA 94104
United States
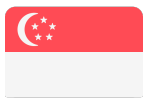
Vancouver
555 Burrard St
Vancouver
BC V7X 1M9
Canada

London
3rd Floor,
Hend House
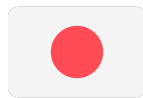233 Shaftesbury Ave
London
WC2H 8EE
United Kingdom

Seoul
909-ho, 22,
Teheran-ro 7-gil,
Gangnam-gu,
Seoul, South Korea,
06130

Singapore
WeWork
9 Battery Road,
Level 6
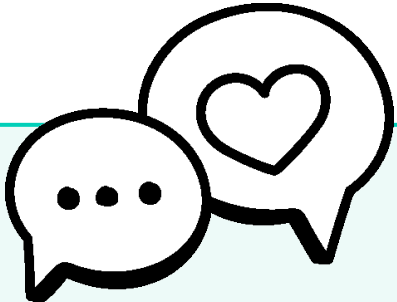Singapore 049910
Singapore

Beijing
Guanghua Ocean
International Center,
10 Jintong Rd (W.),
Tower AB, 7/F,
Chaoyang, Beijing,
100020 China

Tokyo
Kanda First
Building,
45-1 Kandakonyacho,
Chiyoda-ku,
Tokyo 101-0035
Japan

Contact Info:
sensortower.com
sales@sensortower.com

Contact Us

Press : press-apac@sensortower.com
Sales: sales@sensortower.com

Get in touch

Help site

Your online resource for any questions you may have

Learn more

Blog

Check out our blog

Read more