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Festive Season 2025

App marketing trends and
strategies for India

ESSENTIAL GUIDE 2025



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Introduction

India's festive season, which spans a full quarter-year, from Onam in August through Diwali and Christmas in December, is a time of cultural and religious celebration. It's also a critical period for app marketers to drive scale, optimize media investments, and engage high-value audiences.

In 2025, festive campaigns are expected to account for more than 30% of total annual digital ad spend, with mobile continuing to dominate both attention and transaction volumes.

This report, composed in collaboration with **Sensor Tower** and **Mobupps**, synthesizes key market data, campaign benchmarks, and creative strategies to help mobile-first brands succeed during the busiest shopping and engagement window of the year. From CPI and ROAS trends to media mix modeling and creative fatigue mitigation, the insights presented here reflect the latest findings across thousands of campaigns and billions of impressions....



The festive season in India is not just about momentary spikes – it's a strategic window where data-driven storytelling and timely user engagement make all the difference. At the scale we operate, leveraging real-time insights allows us to move beyond just installs and focus on long-term impact. Reports like these help decode shifting consumer behavior during high-intent periods like Diwali, enabling marketers to optimize both performance and brand outcomes.



Nikhil Sharma
Head - Growth & Partnerships



By Singular, in partnership with Sensor Tower and Mobupps





01

Market trends

The festive season
app economy

In 2024, the festive period delivered strong momentum across both gaming and non-gaming. As you'd expect during the holidays, gaming downloads outpaced nongaming in sheer volume.

That said, non-gaming categories – in particular, finance, food delivery, and OTT – showed significant shifts in user intent and monetization, indicating broader adoption of mobile-first services as people enjoyed more leisure time.

- ▶ **Mobile games** saw total downloads surpass 3.2 billion, with in-app purchase (IAP) revenue reaching \$151 million.
- ▶ While Q3 and Q4 downloads dropped slightly from Q2, they delivered the highest revenues of the year – \$88.8M in Q3 and \$92.3M in Q4 – evidence that festive-season users are higher-value and more likely to spend.
- ▶ **October**, the month of Diwali, saw the highest installs overall during the festive period.
- ▶ Revenue grew steadily month over month, peaking in **December**.

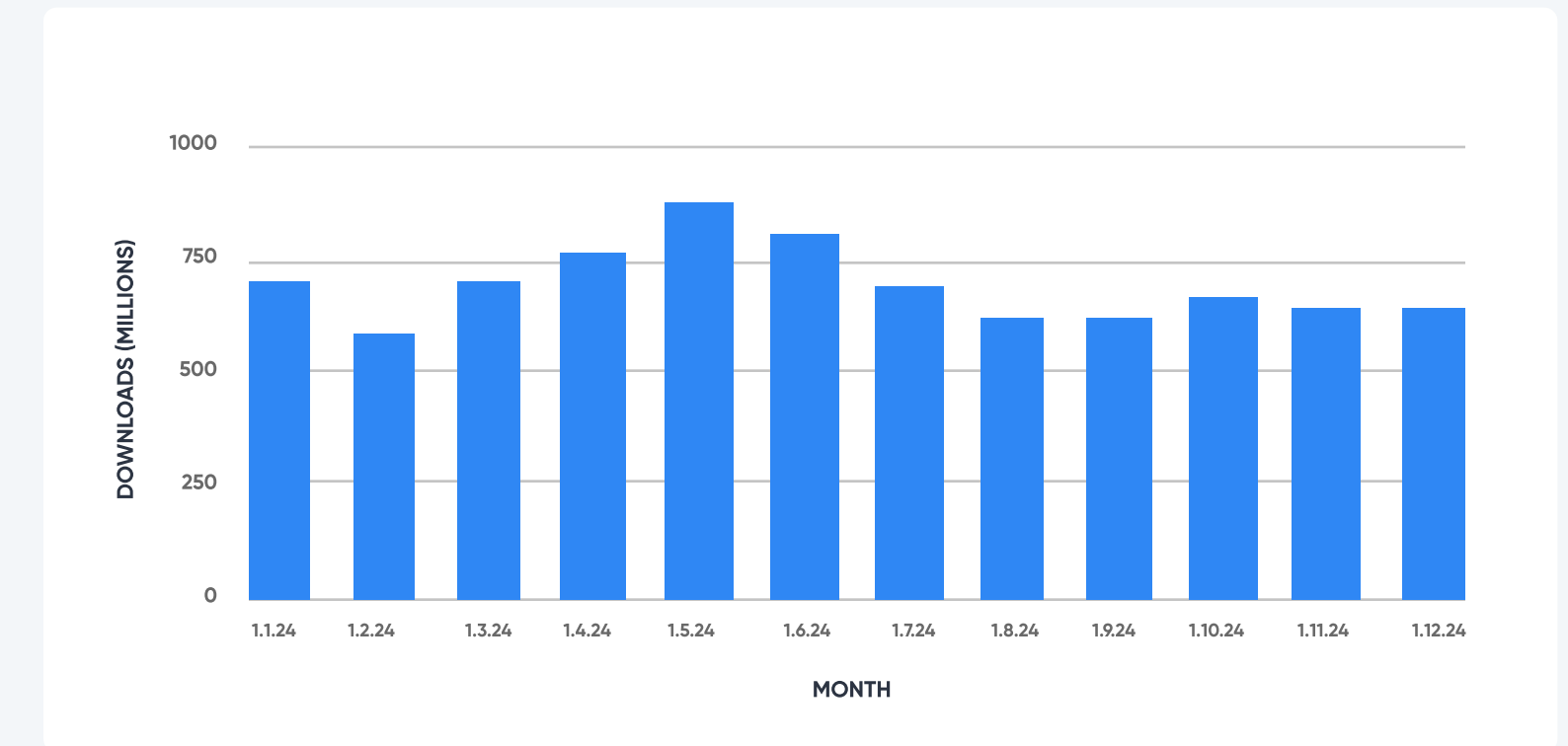
\$88.8M

Revenue delivered in **Q3** 2024

\$92.3M

Revenue delivered in **Q4** 2024

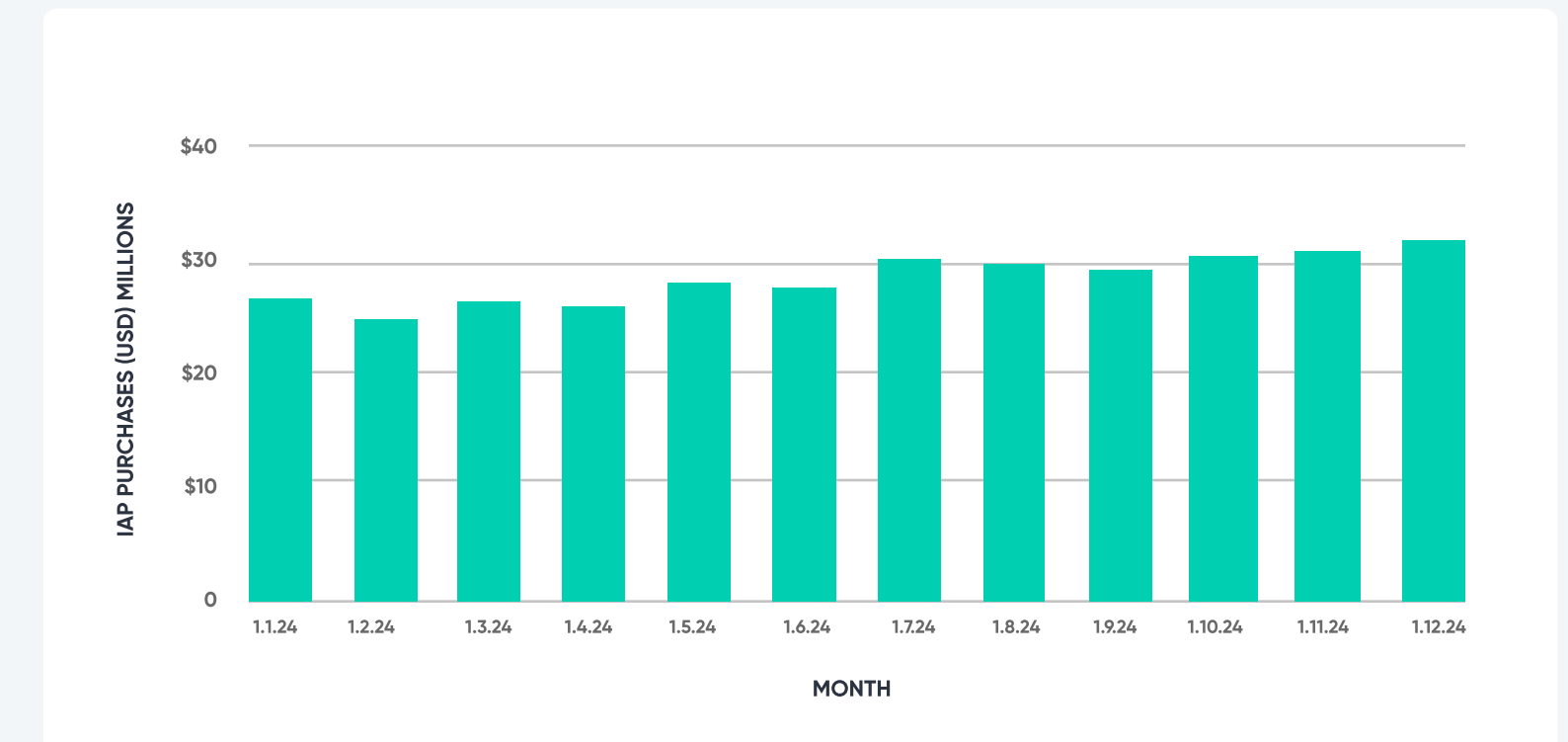
Mobile Games App Downloads January – December 2024 | India



Source: Sensor Tower



Mobile Games App IAP Store Revenue January - December 2024 | India



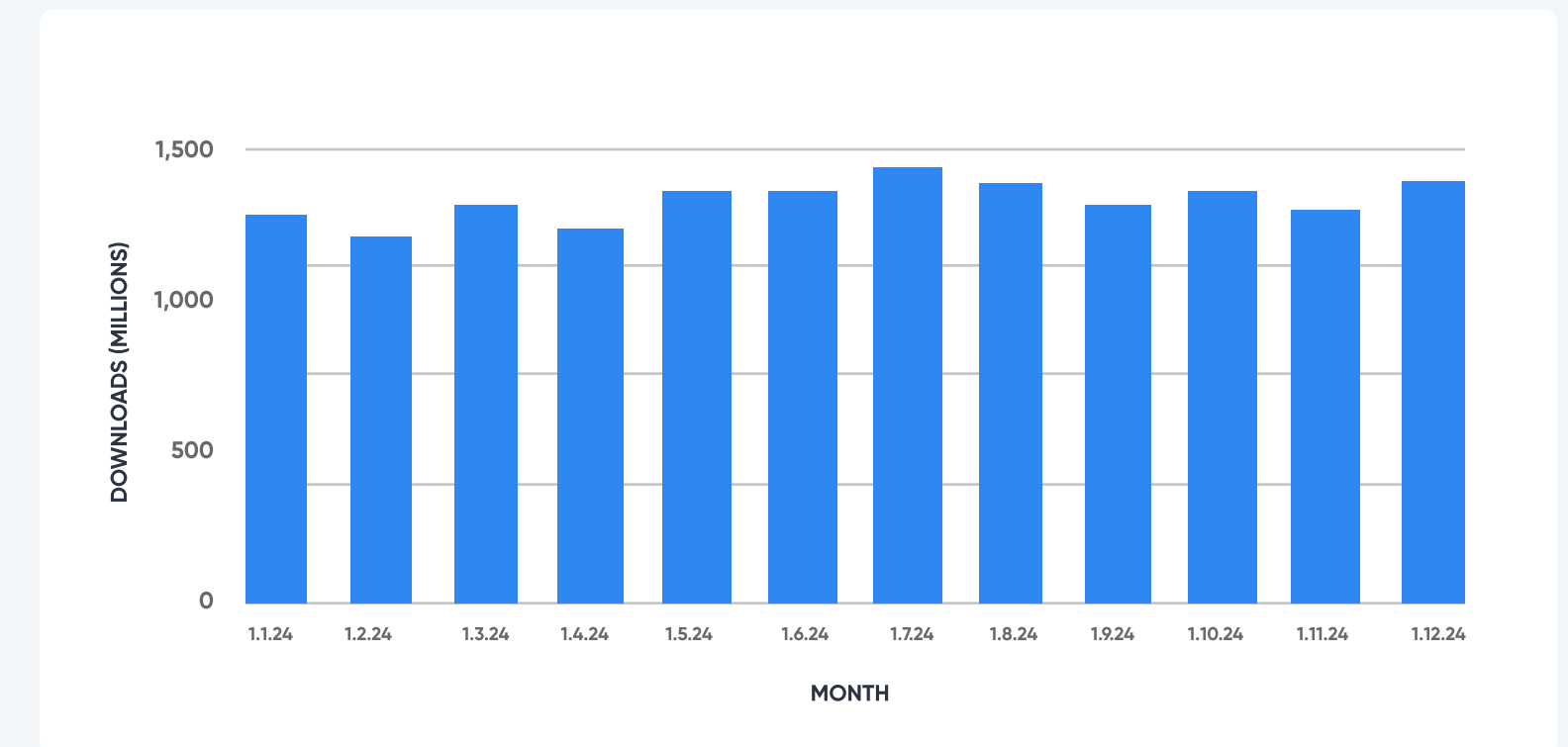
Source: Sensor Tower





- ▶ **Non-gaming apps** also surged during the festive quarter, particularly in shopping, fintech, food delivery, and OTT, where seasonal behavior shaped both install and revenue trends.
- ▶ **In non-gaming**, there was a strong correlation between festive milestones and transactional behavior. This suggests that during the holidays, users prefer the convenience of mobile to manage shopping, meals, payments, and entertainment.

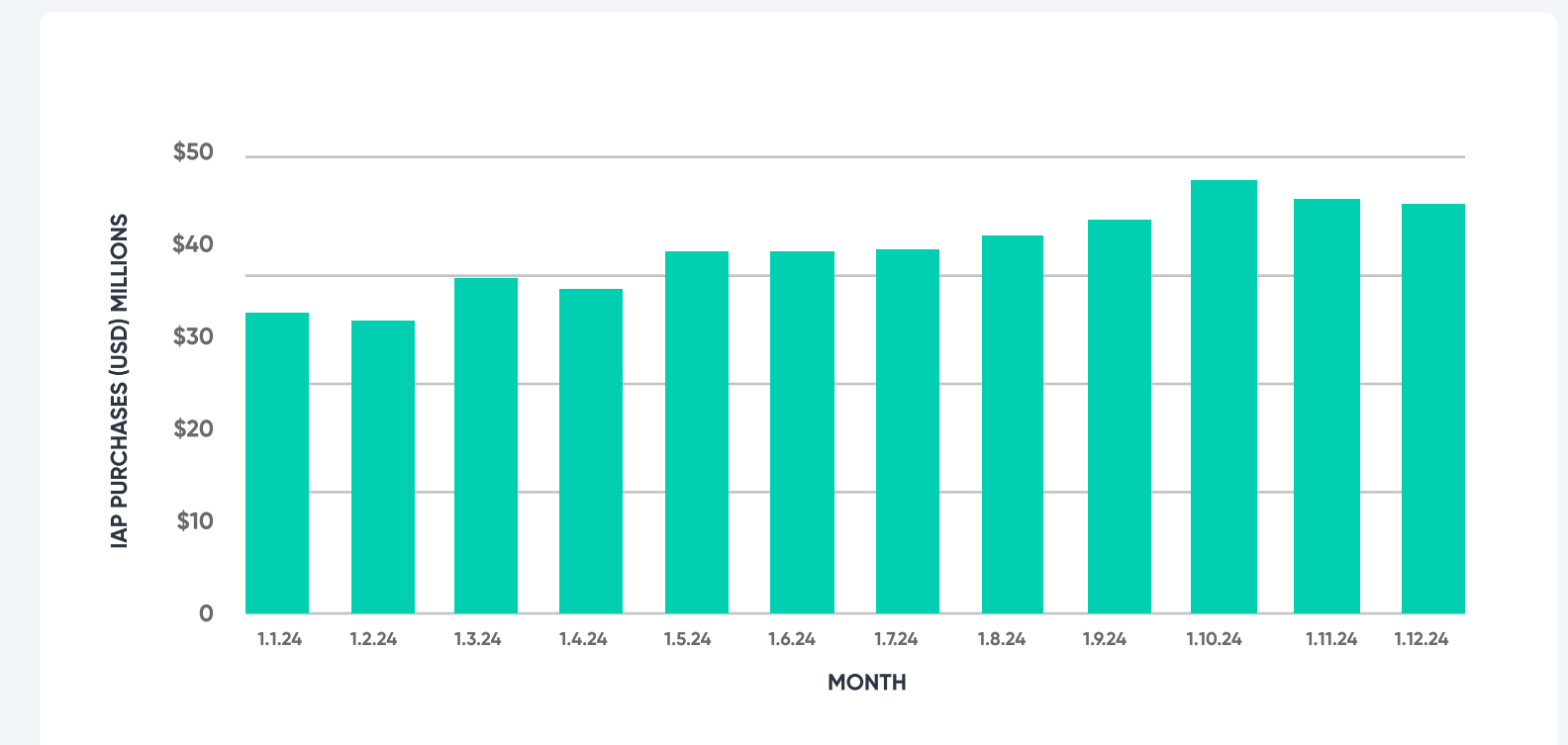
Mobile App (Non Games) Downloads January - December 2024 | India



Source: Sensor Tower



Mobile App (Non Games) App IAP Store Revenue January - December 2024 | India



Source: Sensor Tower



Key indicators from the 2024 season (SEP-DEC)

India's festive quarter outpaces the rest of the year. Mobile ad spend in India surged from ₹850 crore in Q1-Q2 2024 to ₹1,300 crore in Q3-Q4, marking a 53% increase, according to data from Mobupps.

The holiday season created a massive opportunity for brands as they tapped into the celebratory spirit, and users responded with rapt attention.

 India Monthly Digital Ad Spend Trends and Forecast



Source: Sensor Tower



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.

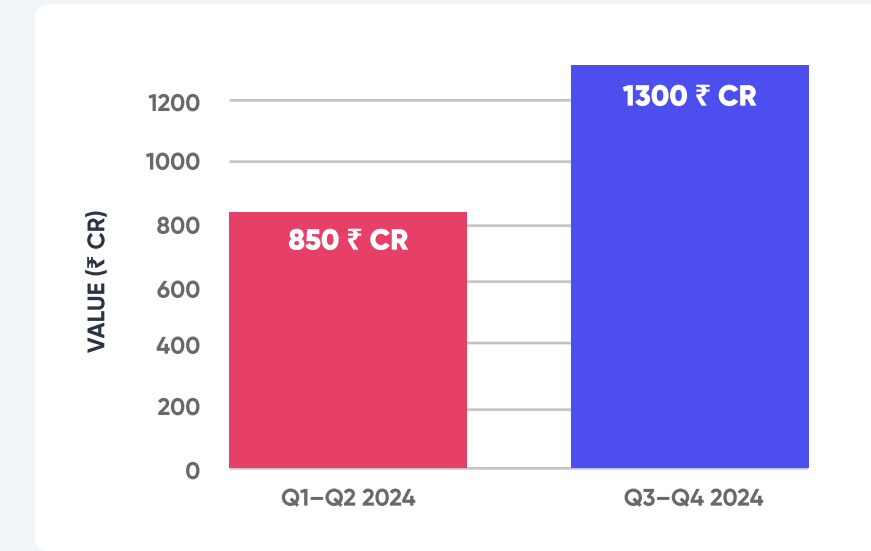
The projected sharp increase beginning in October is expected to push monthly spending towards the \$250 million mark, signaling a recordbreaking holiday season.

India: State of Digital Advertising



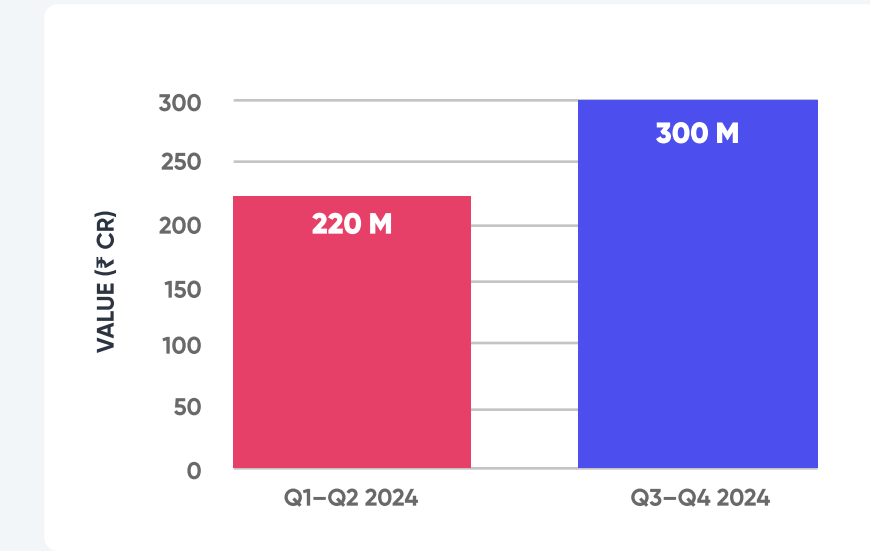


Total Mobile Ad Spend (India)



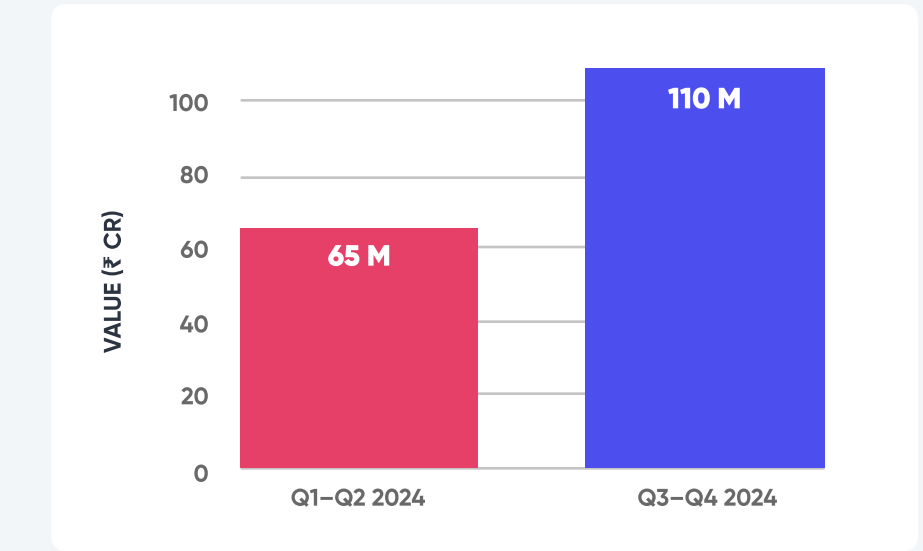
Source: Mobupps

App Installs



Source: Mobupps

Re-engagement Events



Source: Mobupps

Key indicators from the 2024 season (Sep–Dec):

- ▶ **App installs** rose 36% exceeding 300 million during the festival season.
- ▶ **Re-engagements** increased 69%, as brands pushed retention-focused campaigns in the weeks following Diwali, and users responded by coming back for more.
- ▶ **Gaming and entertainment categories** peaked during Diwali week, while finance, travel, and shopping apps saw extended activity through December.



If the first half of 2024 was the warm-up, Q3–Q4 turned into a full-blown celebration for mobile advertisers in India. The Diwali week alone saw record-breaking activity, proving once again that seasonal moments are both culturally and commercially significant.



Yaron Tomchin
CEO



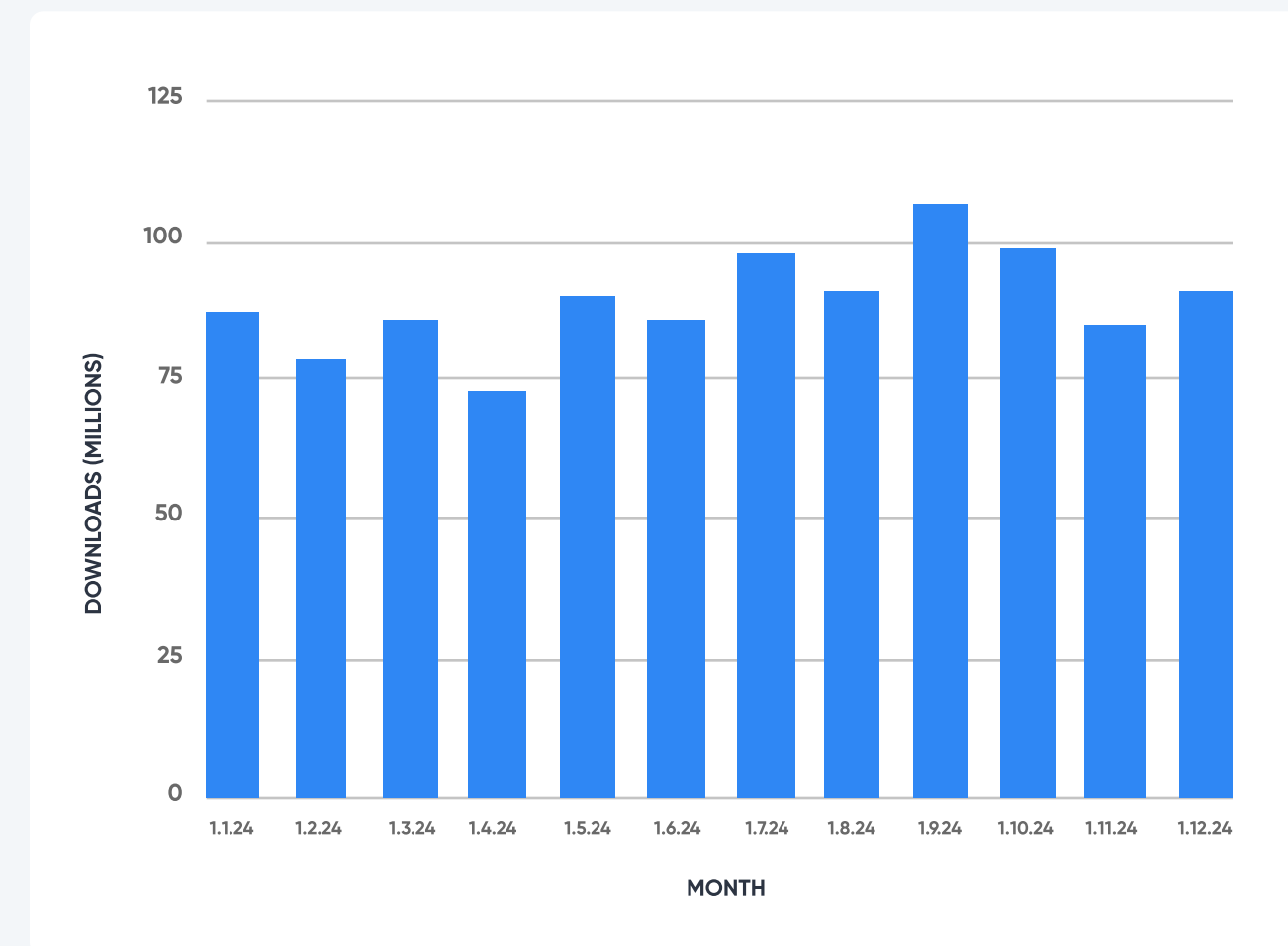
Category-level shifts

User behavior and engagement varied across verticals during the holidays. App categories saw distinct seasonal patterns that were influenced by factors including timing, audience demographics, and cultural triggers. According to Sensor Tower ▶

Shopping apps

Saw the steepest install acceleration during Dussehra and Diwali. In Q3, downloads rose nearly 20% over Q2. October marked the annual peak, driven by Diwali mega-sales. Meesho, Flipkart, and Amazon led across both installs and engagement, reflecting strong demand in both Tier 1 and Tier 2/3 markets.

 Mobile Shopping App Downloads
January - December 2024 | India



Source: Sensor Tower

 Sensor Tower

These trends highlight the importance of building momentum from late Q2 or early Q3, leveraging emotional, regional, and urgency-driven creatives to capture early shoppers – while continuing strong throughout Q4 to drive re-engagement and gifting-led conversions.



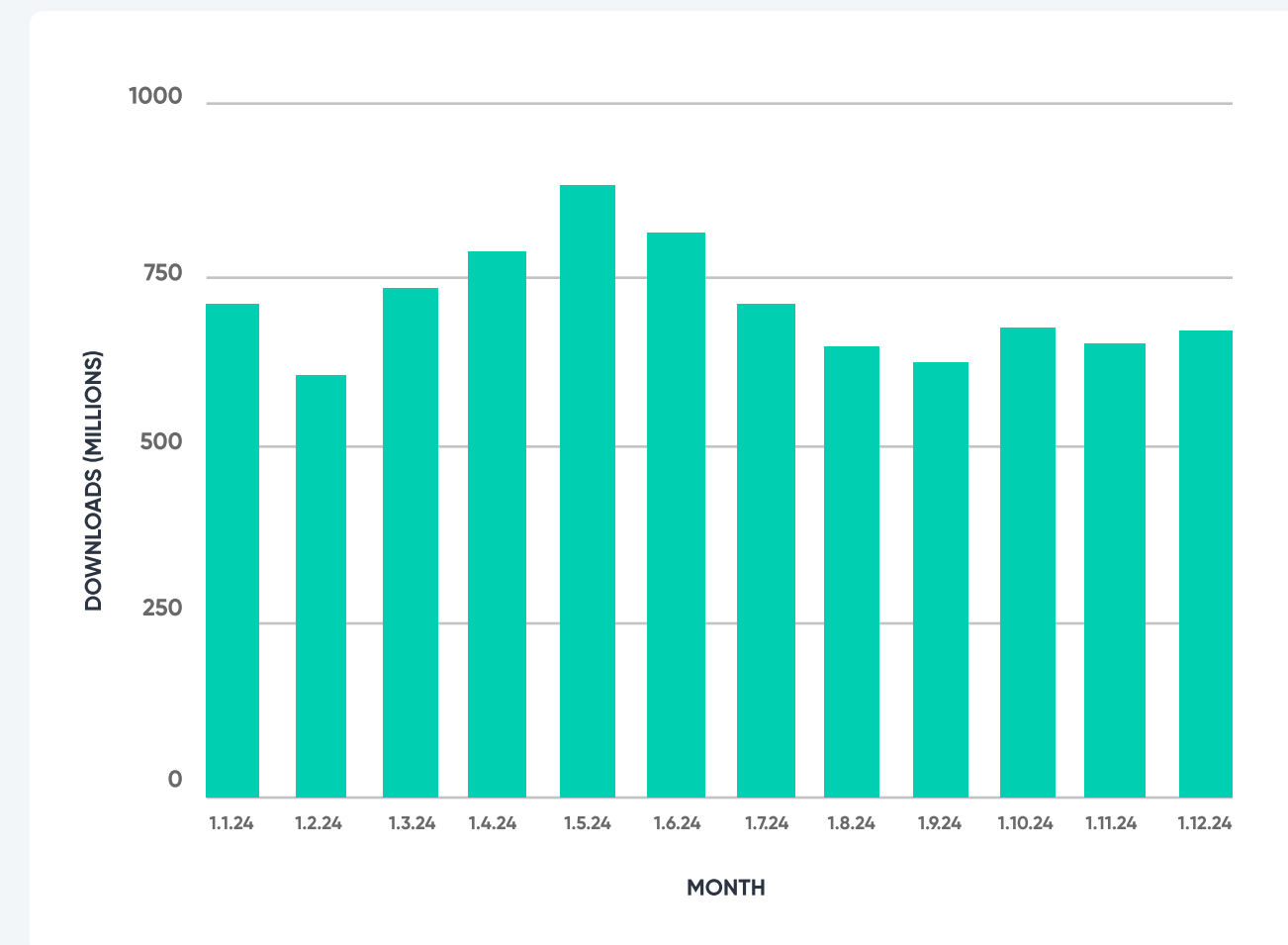
Gaming apps

Saw strong momentum throughout the 2024 festive season, generating more than 3.2 billion downloads and \$151 million in in-app purchase (IAP) revenue between August and December.

Volume in Q3 and Q4 was slightly lower than in Q2, but revenue performance reached annual highs (\$88.8 million in Q3 and \$92.3 million in Q4) illustrating the higher lifetime value of users acquired during the festive season. October delivered the highest install volume of the season, while IAP revenue continued to climb month over month, peaking in December.



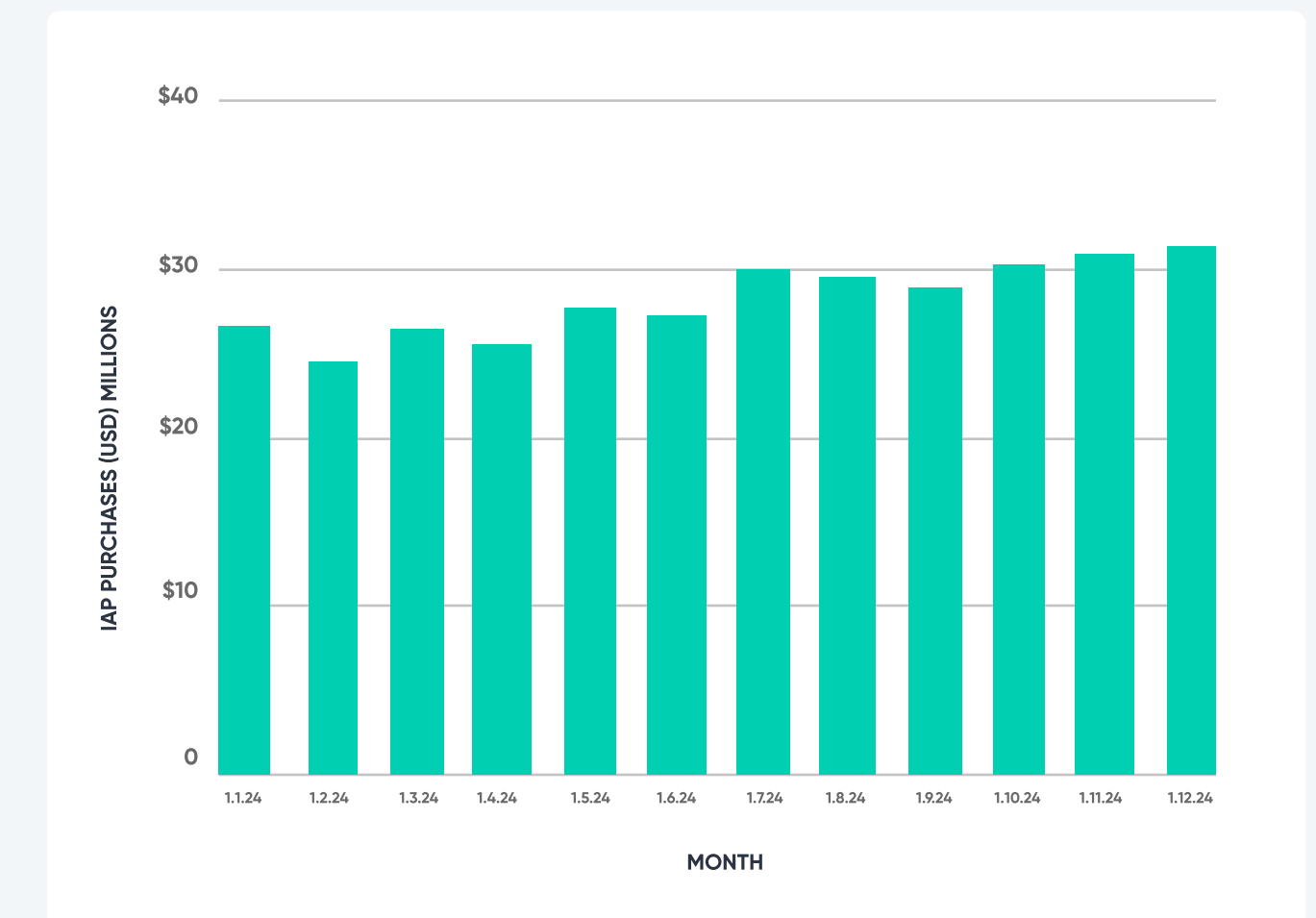
 Mobile Games App Downloads
January - December 2024 | India



Source: Sensor Tower



 Mobile Games App IAP Store Revenue
January - December 2024 | India



Source: Sensor Tower





These trends suggest that the festive season presents a high-intent window for finance marketers; not just to drive installs, but to deepen lifecycle value through trust-building and timely re-engagement.



Donny Kristianto
Principal Market Insights Manager



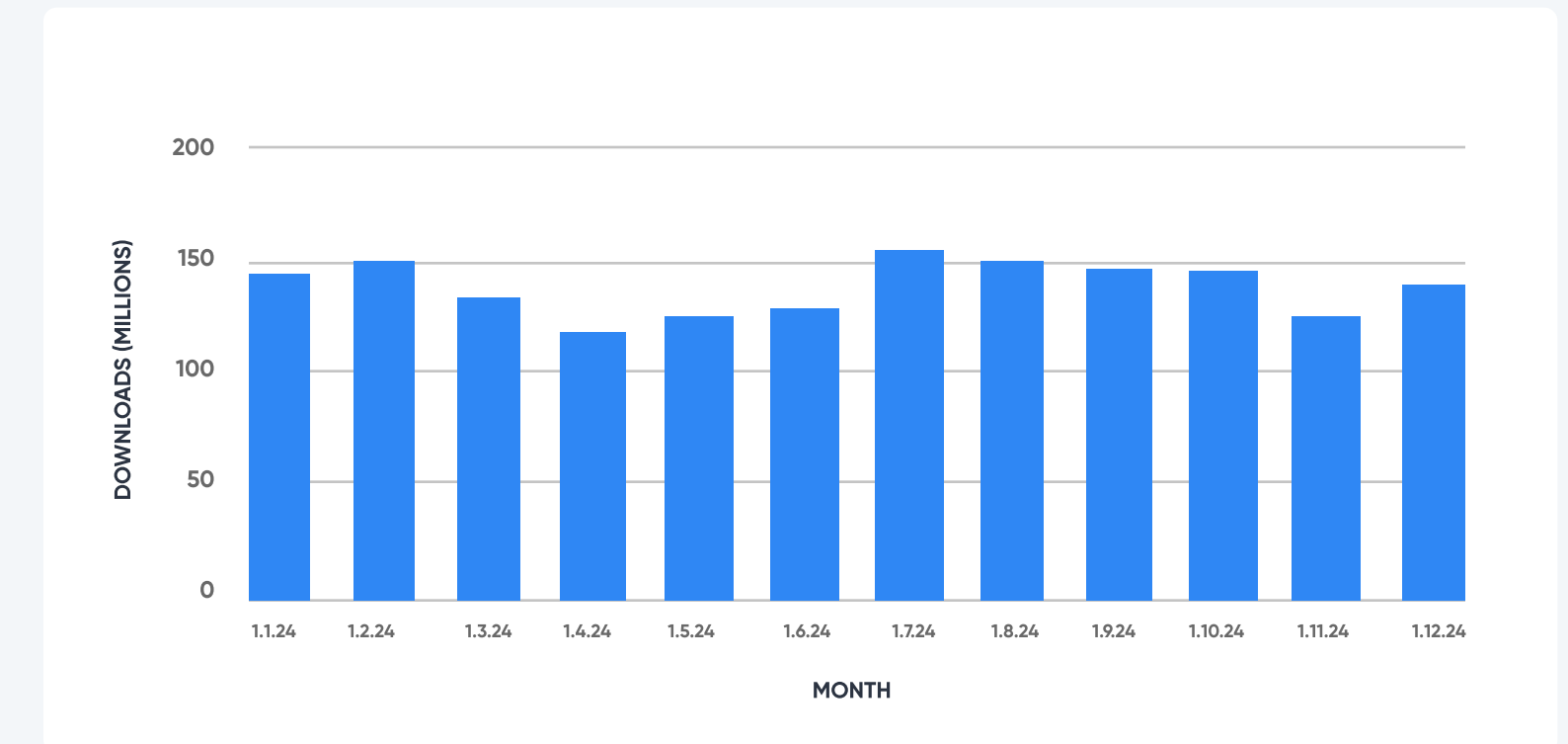
Finance and travel apps

Saw strong post-Diwali momentum, as consumers began planning year-end purchases, vacations, and tax-saving investments.

Finance apps

Made gains in both user acquisition and revenue during the holidays. Reflecting preparation for the season, downloads shot up to 457.1 million in Q3, before leveling off to 414.3 million in Q4, well above levels seen in the first half of the year. Even more significantly, in-app purchase revenue reached \$3.3 million in Q4, up from \$2.43 million in Q3, evidence of a lift in both engagement and transactions. October and December were strong for monetization, since there appeared to be an increased interest in gifting, investing, and financial planning. PhonePe, Google Pay, and Paytm remained the dominant players by downloads and MAU, while apps like Bajaj Finserv, Groww, and YONO SBI made gains thanks to targeted festive offerings. TradingView and Moneycontrol led in revenue over the two quarters.

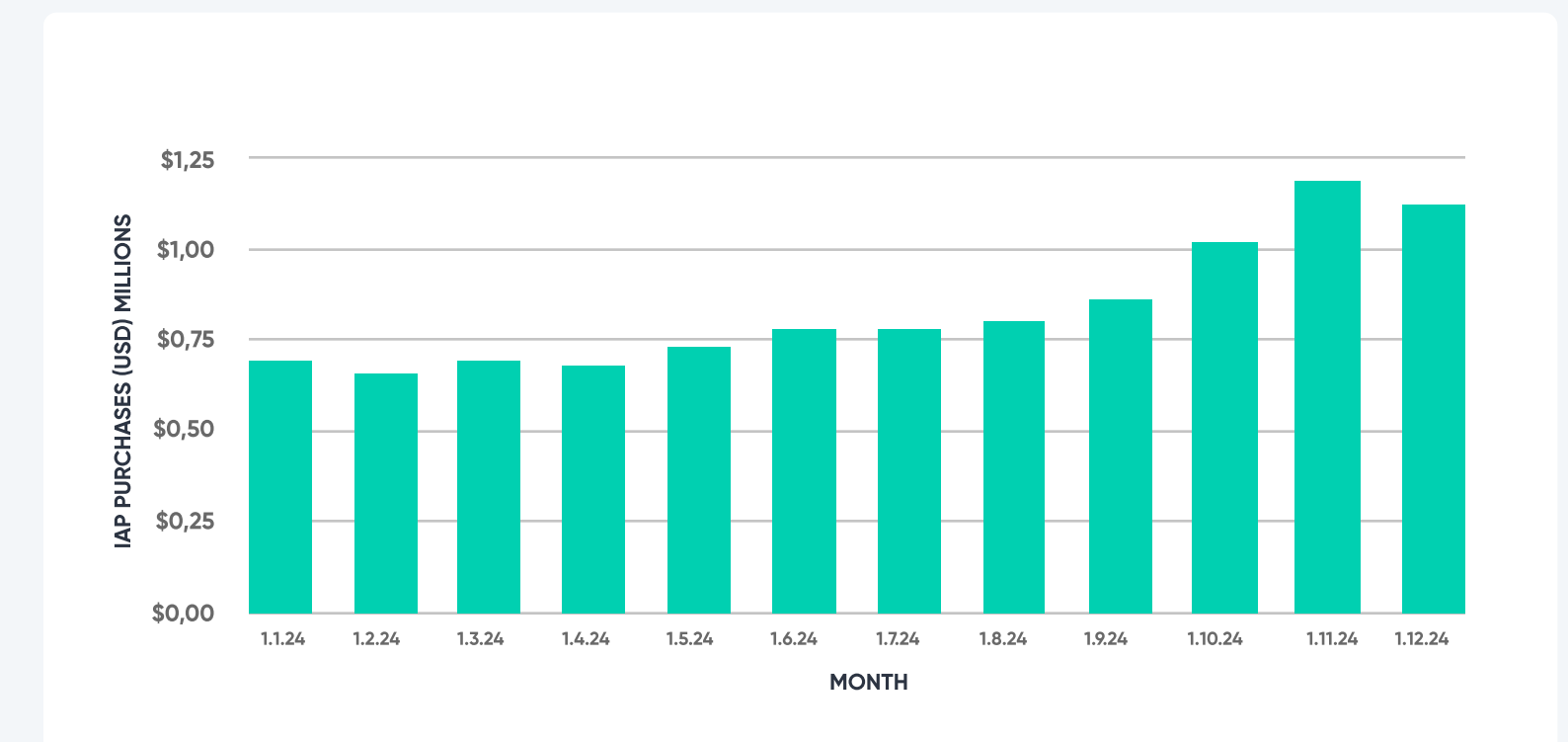
Mobile Financial Services App Downloads
January - December 2024 | India



Source: Sensor Tower



Mobile Financial Services App IAP Store Revenue
January - December 2024 | India



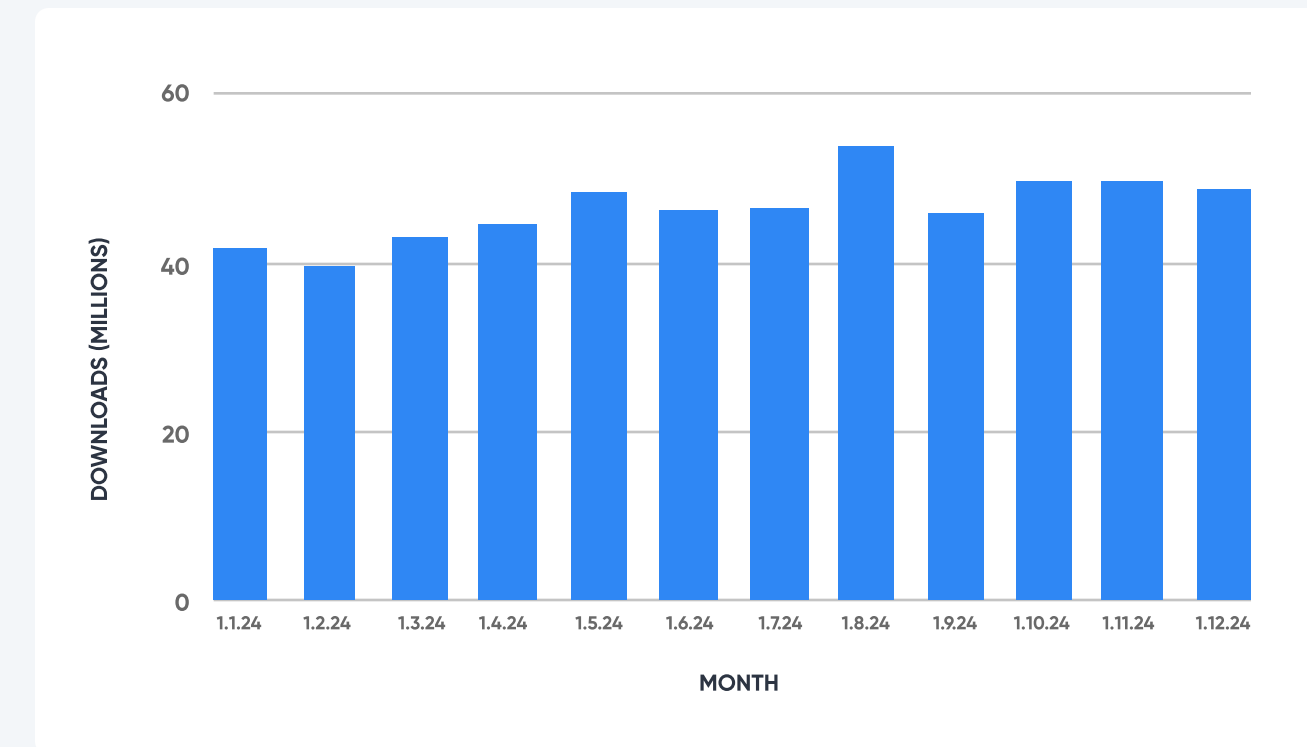
Source: Sensor Tower



India's **travel app** sector grew steadily during the 2024 festive season, as mobility surged around key holidays. Downloads increased to their highest quarterly total, **150.3 million**, in Q4, while in-app purchase revenue rose **40%** from Q2 to Q4, reflecting higher engagement with ticketing, premium services, and travel tools.

"Where is my Train" led consistently in downloads and MAU, underscoring the importance of rail travel during holidays. Multimodal platforms like Rapido, Ola, Uber, and ixigo held onto strong performance, as did value-focused apps like UTS and redBus.

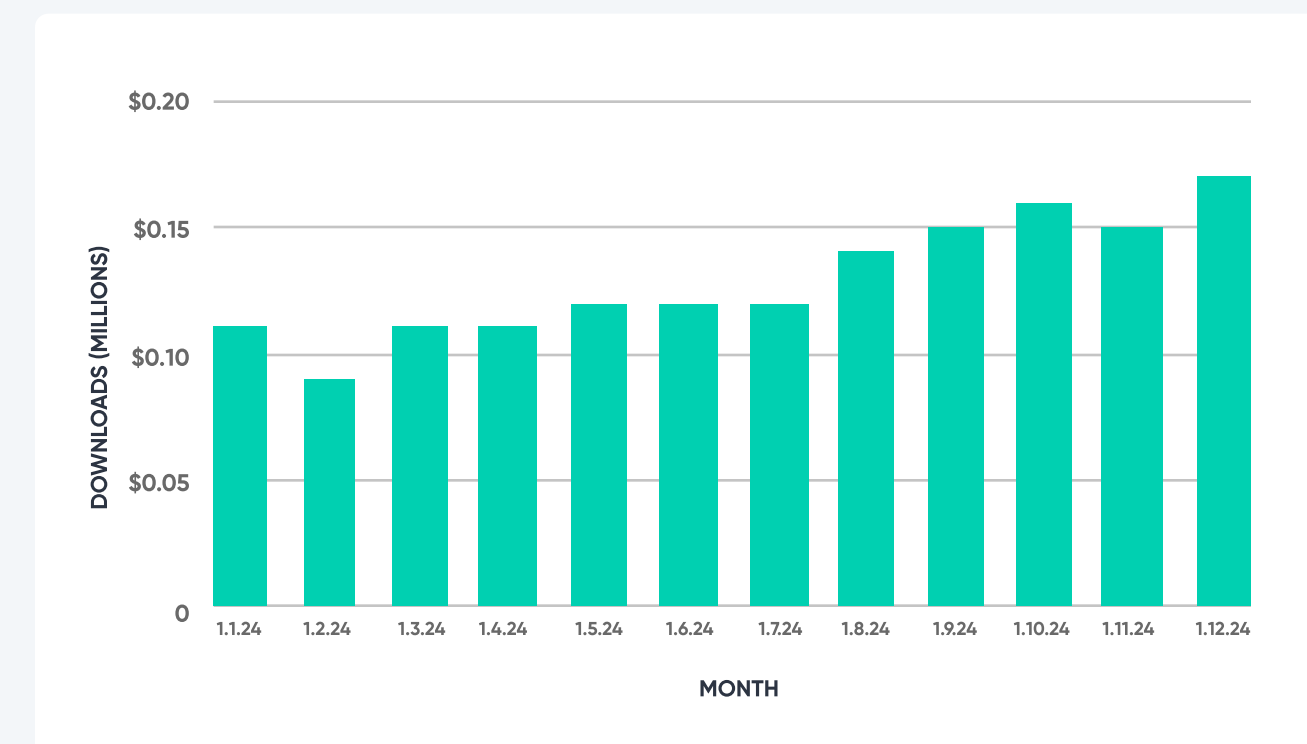
Mobile Travel & Tourism App Downloads
January - December 2024 | India



Source: Sensor Tower



Mobile Travel & Tourism App IAP Store Revenue
January - December 2024 | India



Source: Sensor Tower



Flightradar24 topped revenue rankings, while apps like Radarbot and Flighly also contributed to monetisation, underscoring the role of global travelers, flight tracking and even travel-inspired gaming during this period. Google Maps remained the most used travel utility by MAU.



These trends point to a clear opportunity for marketers to activate late in the third quarter, with peak installs during Diwali and continued usage through December. Campaigns focused on convenience, value, and local discovery will likely perform best.



Sijo Joseph
India Sales Director



Food and dining apps enjoyed the strongest performance of the year during the 2024 festive season, with downloads rising from **76.7 million** in Q2 to **91.6 million** in Q3, and peaking at **115.7 million** in Q4.

December saw the highest monthly volume, driven by gifting, party planning, and last-mile delivery demand. **Zepto** led in downloads across the season, reflecting growing consumer preference for quick commerce. **Swiggy** and **Zomato** remained competitive, trading places month to month based on promotional activity.



The 2024 festive season proved that food delivery is no longer just about discounts, it's become a finely tuned, data-driven sprint. Market trends showed heavier mobile-first demand and concentrated spikes around key celebrations, while campaign benchmarks revealed that optimized media mixes and hyper-local creatives delivered the highest returns. For 2025, prioritize mobile ad spend where impressions convert fastest, diversify media to balance reach and efficiency, and localize creative to lift relevance. Pair this with aggressive post-Diwali remarketing - use deferred deep links and segmented offers to re-capture intent and underpin every tactic with real-time performance analytics to reallocate budget dynamically. These shifts turn seasonal spikes into sustained growth rather than one-off wins.



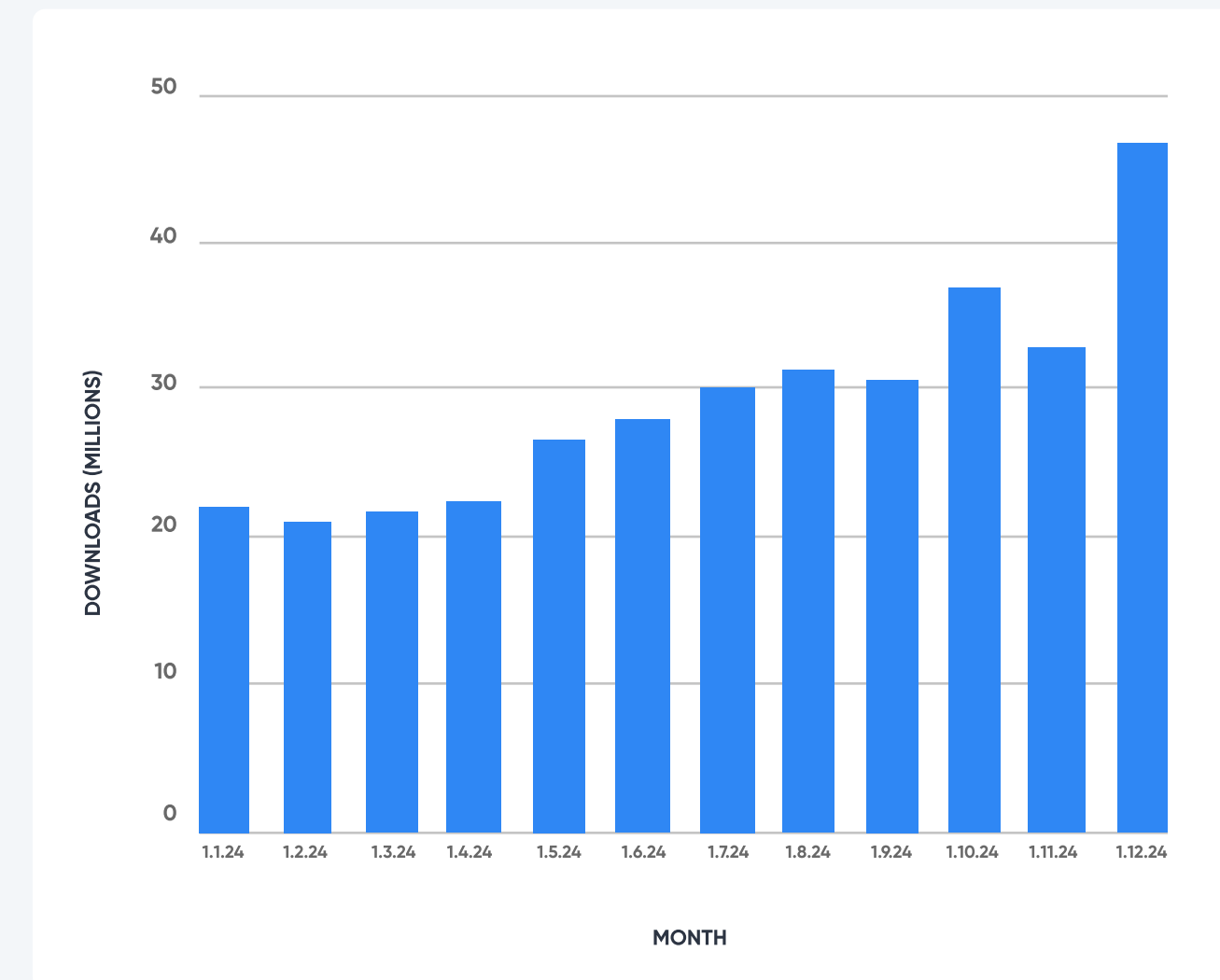
Nikhil Karunakaran
General Manager - Growth Marketing





Blinkit, Domino's, bigbasket, and Country Delight also performed well, which highlights the demand for both restaurant delivery and groceries. As far as engagement, Swiggy led MAUs consistently, followed by Zomato and Zepto. Magicpin, McDonald's, and KFC rounded out a strong showing for QSRs and loyalty-focused platforms.

Mobile Food & Dining Services App Downloads January - December 2024 | India



Source: Sensor Tower



The festive season is clearly a key window for food delivery and grocery apps. To maximize impact, we recommend that marketers plan acquisition campaigns early in Q3 and reinforce them with retention and loyalty initiatives through year-end.



Monika Mansinghani
India Sales Director



Unpacking the Festive Shopper

A demographic profiles of key apps in India

18-24
25-34 YO

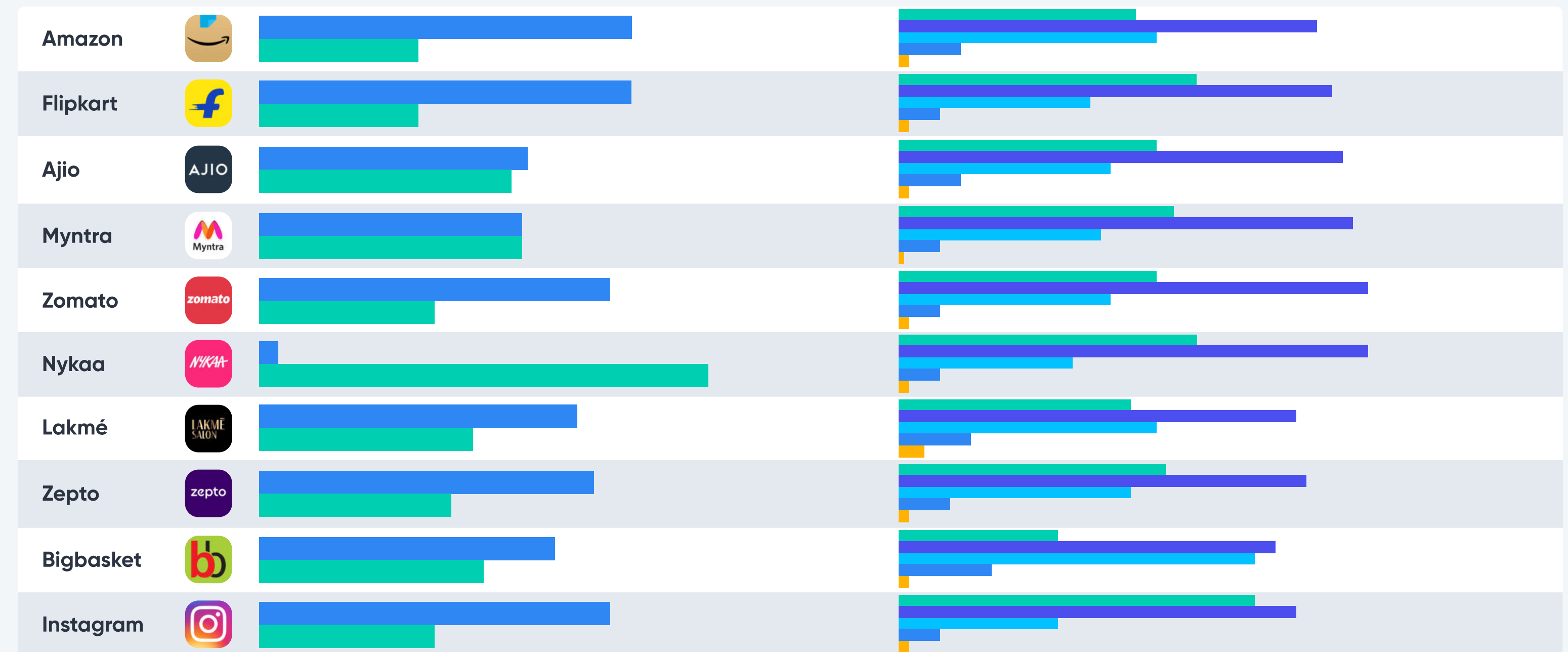
Are **core user base** for most platforms



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.

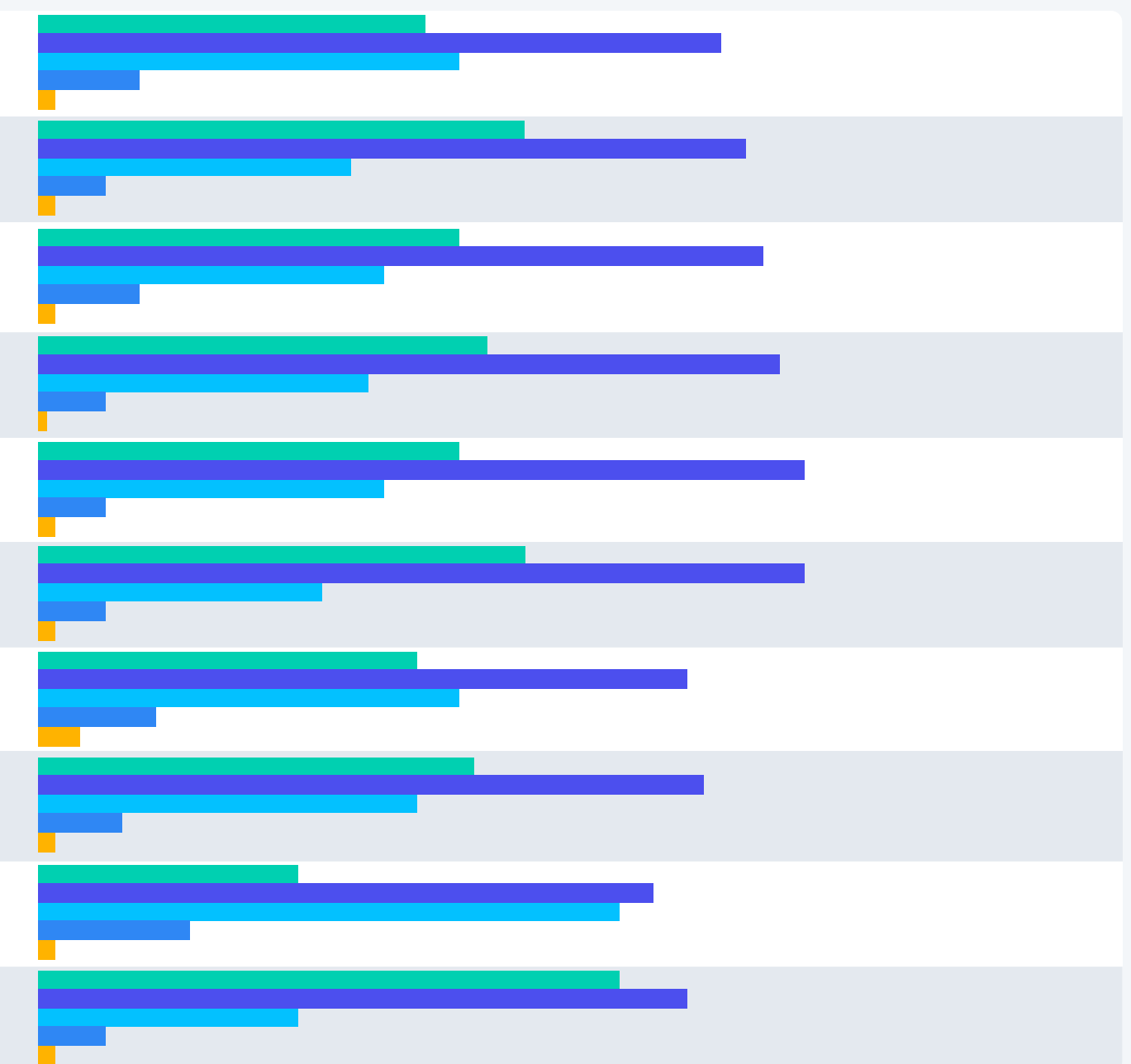
Age is another critical factor, with the audience in India being predominantly young. The 18-24 and 25-34 age brackets form the core user base for most platforms, with Instagram and Nykaa showing a particularly strong concentration of younger users.

Gender Distribution among Select Apps During Q4 2024 Festive Season



Male Female

Age Distribution among Select Apps During Q4 2024 Festive Season



18-24 25-34 35-44 45-54 55+



02

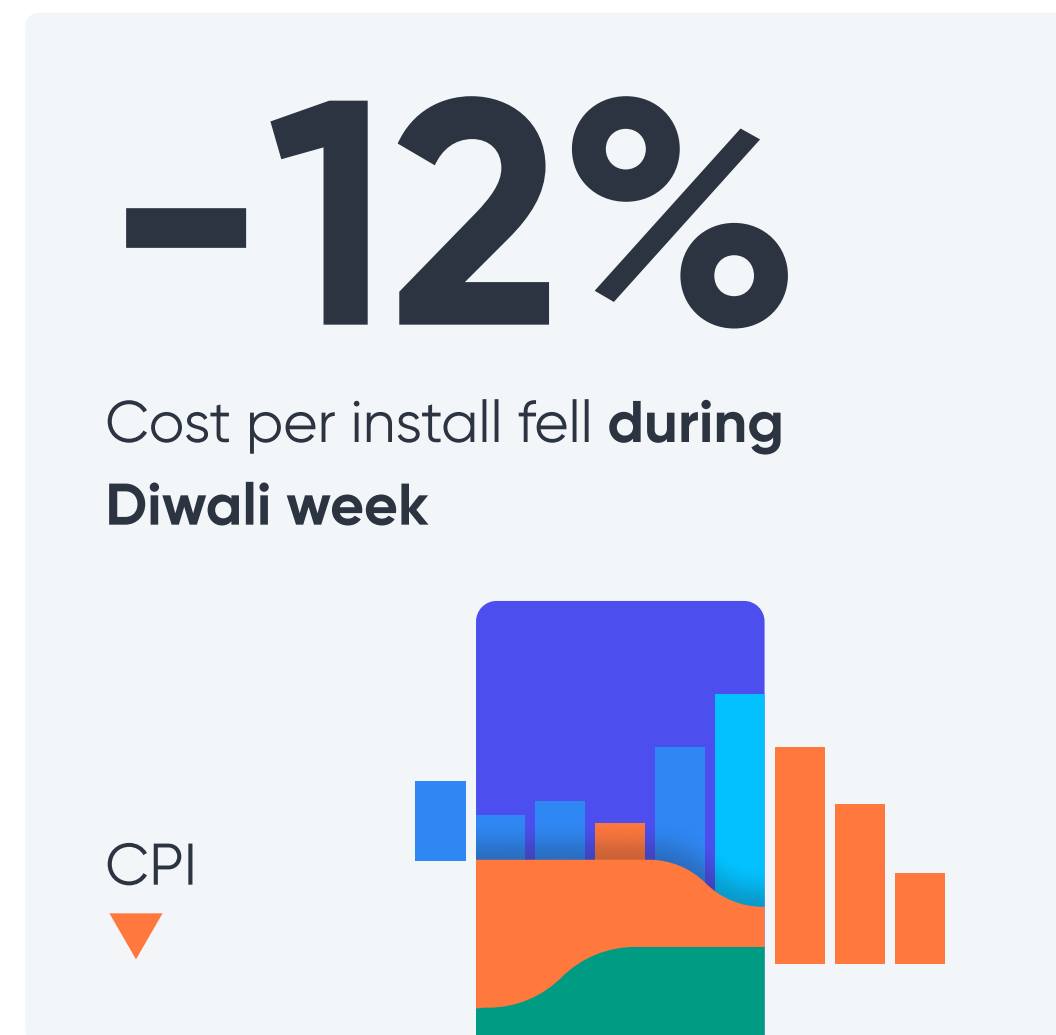
Performance benchmarks

Cost, performance, and return on ad spend

There were sharp fluctuations in campaign costs during the 2024 season, with marketers aggressively competing for visibility in a crowded market.

Cost per install (**CPI**) fell by an average of 12% during Diwali week, as budgets peaked and inventory expanded.

But costs per action (**CPA**) stayed relatively stable across most categories, which suggests that efficiency in user acquisition strategies improved.



CATEGORY	AVG. CPI (₹)	AVG. CPA (₹)	ROAS (FESTIVE)	ROAS (NON-FESTIVE)	TOP AD FORMAT	CTR UPLIFT %	CR UPLIFT %
eCommerce	25	110	3.8X	2.5X	Video	20	15
Gaming	18	95	2.1X	1.6X	Playable	35	20
Fintech	35	140	4.2X	3.1X	Native	18	10
OTT	28	125	3.5X	2.7X	Video	25	17
Travel	22	105	4.0X	2.8X	Carousel	30	22
Food & Drinks	20	90	3.2X	2.4X	Native	16	14



Mobupps observed notable increases in **mobile CTR** across categories:

28%	Food and drink
27%	OTT
24%	Gaming

Return on ad spend (**ROAS**) was strongest in the post-Diwali period, particularly in:

Gaming	142% ROAS by the third week of November
Finance	128% ROAS in the same period
Shopping	A sustained ROAS uplift of over 100% for nearly four weeks post-Diwali

Media costs dropped during the week of Diwali, but the highest-value conversions occurred in the following two to four weeks. This is likely the result of growing consumer openness to offers and upgrades after the peak of gifting activity.

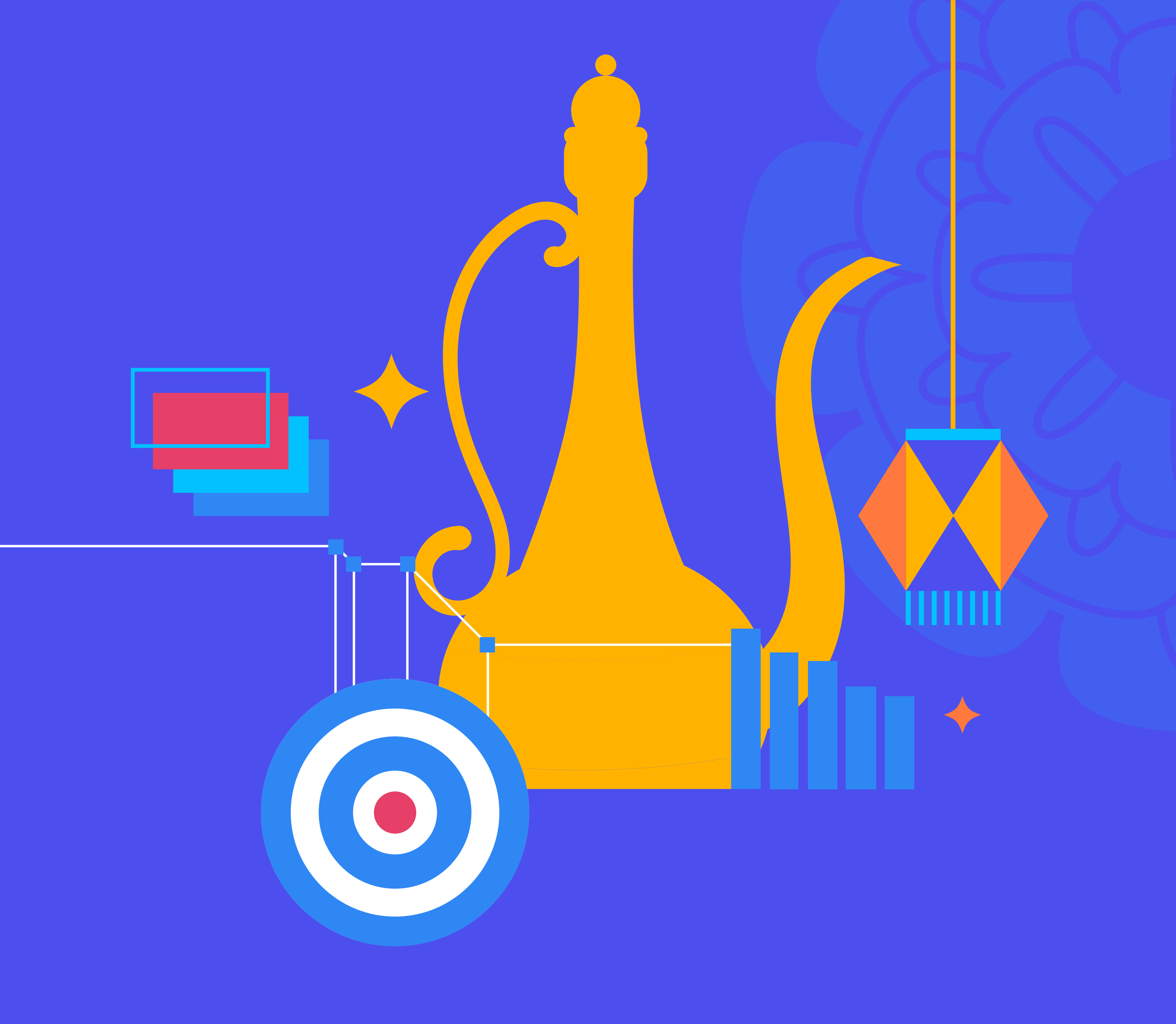


The festive season is always competitive, but this year we saw the biggest performance gains by spending smarter. Instead of front-loading everything around Diwali, we focused on pacing and post-peak optimization. User intent remained high, and our campaigns delivered stronger engagement, better retention, and a much healthier ROAS in the weeks after the holiday. It really emphasized how critical timing, creative refresh, and smart audience segmentation are for driving performance.



Siddhant Singh
AVP - Growth & Marketing





03

Media mix and channel insights

Programmatic leads on pure performance

But a diversified media mix is key to drive full-funnel impact during the festive period

Programmatic emerged as the top-performing channel during the festive season, delivering a **48.7%** uplift in conversion rate, outpacing all other platforms. Precision targeting and real-time optimization made it the most efficient option for performance at scale.

Meta remained the strongest upper-funnel channel, driving engagement and brand storytelling, while **Google** offered reliable install volume with moderate uplift.

OEM placements, particularly on Xiaomi and Samsung devices, saw a 33.3% boost in Tier 2 and Tier 3 cities, which helped extend festive reach beyond the major metropolitan markets.

Influencer and branded content campaigns also proved effective, delivering a 21.8% increase in conversions through emotionally resonant storytelling.

+33.3%

Samsung and **Xiaomi** grew in Tier 2 and Tier 3 cities



+21.8%

Conversion growth through **influencer** and **branded content** campaigns



Diversifying beyond Meta and Google



Programmatic is king for performance, but a blended strategy across Meta, Google, OEMs, and influencers ensures full-funnel success, especially when festive emotions are running high.



Apoorv Shukla
Vice President - Global Strategy



While Meta and Google remained dominant in terms of overall reach, investment is growing in alternative channels:

- ▶ **OEM inventory** (e.g., Xiaomi, Vivo, and Samsung platforms) drove nearly 19% of total installs during the festive period, particularly for utility and entertainment apps.
- ▶ **Affiliate and performance** networks grew in the shopping and DTC categories, especially when festive coupons and influencer-led creative were in the mix.
- ▶ **DSP and programmatic channels** accounted for 24% of app installs during Diwali week, with the highest contribution to travel and gaming campaigns.

Significant performance differences by platform were also observed:

- ▶ **Meta** excelled in upper-funnel awareness and engagement, particularly through Reels and video ads.
- ▶ **Google Ads** and **YouTube** were most effective for mid-funnel actions (e.g., search, install)
- ▶ **Programmatic partners** and **DSPs** consistently drove highly efficient lower-funnel conversions.





04

Creative strategy

Mobupps data confirms that smart creative, coupled with seasonal timing, played a critical role in unlocking performance across the board.

The festive season delivered measurable performance gains across key verticals, with brands seeing stronger returns and higher-quality users throughout Q3 and Q4.

Fintech led all categories with a 4.2x ROAS, the result of heightened consumer trust and spending intent. **Travel and e-commerce followed closely at 4.0x and 3.8x respectively**, as users planned and shopped for the holidays on their mobiles.

In gaming, **playable ads drove a 35% increase in CTR and a 20% lift in conversions**, suggesting that these engaging formats are even more effective in capturing attention during the holidays.

Video formats delivered the strongest results for e-commerce and OTT, supporting brand engagement and conversion at scale. Even steady performers like food and drink and OTT saw ROAS improve by 30 to 40 %.

FINTECH

**4.2X
ROAS**

Fintech's lead in all categories

TRAVEL

**4.0X
ROAS**

Travel's lead in all categories

E-COMMERCE

**3.8X
ROAS**

E-commerce's lead in all categories

Playable ads ▶



CTR
+35%

CONVERSIONS
+20%

How top-performing brands stood out

In a crowded festive ecosystem, where nearly every brand is running performance campaigns, creative execution becomes the single biggest differentiator.



According to Mobupps, creative saturation was reached earlier in the 2024 festive cycle than in previous years. Brands that rotated creatives weekly—or deployed localized variants—consistently outperformed those that did not.

Across shopping, finance, and gaming apps, the highest-performing creatives shared several key characteristics:

- ▶ **Culturally relevant visuals** (e.g., Diwali lamps, fireworks, family gatherings)
- ▶ **Language personalization** for Hindi, Tamil, Bengali, and Telugu audiences
- ▶ **Festive urgency cues**, including countdowns, time-sensitive discounts, and “ends today” overlays



Creative matters, especially during this busy season. Festive campaigns proved once again that small tweaks in creative can drive big performance differences.



Pulkit Budhiraja
Country Director - India



Creative format performance

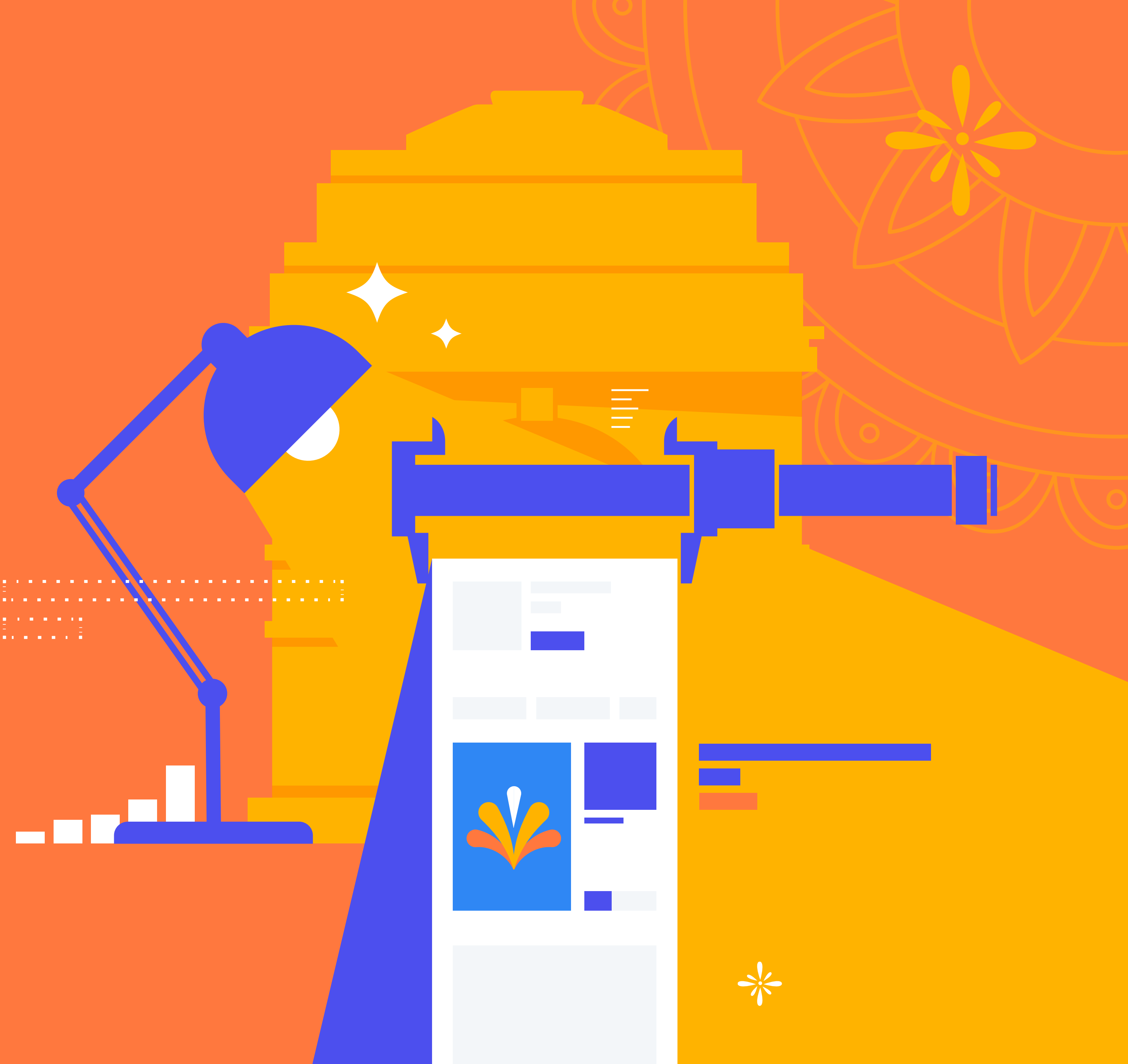
Mobupps observed the following format performance trends during the festive season

CREATIVE FORMAT	THEME	A/B TEST VERSION	CTR %	CR %	NOTES
Video Ad	Discounts	A (Red + Bold Text)	2.5	1.8	Performed best during Diwali
Video Ad	Discounts	B (Minimal + Voiceover)	2.1	1.5	Less appealing visually
Native Ad	Emotional Appeal	A (Family setting)	3.1	2	Best for OTT and Fintech
Native Ad	Emotional Appeal	B (Animated)	2.2	1.4	Weaker engagement
Playable Ad	Urgency	A (Countdown timer)	4.8	3.2	Great for gaming apps
Playable Ad	Urgency	B (Static CTA)	3.9	2.7	Lower retention

- ▶ **Rewarded video ads** delivered the highest install rates and longest engagement times
- ▶ **Playables** saw strong traction in gaming and fintech, particularly for apps offering rewards or seasonal experiences
- ▶ **Native ads** resonated deeply when they featured emotional storytelling. Animated creatives fared poorly by contrast.

Mobupps also reported that ads with festive visual cues, urgency messaging, and local language copy consistently outperformed generic creatives.

In addition, Sensor Tower data shows that many of the top 10 apps by downloads in Q4 2024 relied heavily on festive-specific creative series, updating ad units every 7–10 days to reflect campaign phases (e.g., pre-Diwali, Diwali week, post-Diwali sales).



05

Remarketing, retargeting, and retention

The post-Diwali goldmine

While most festive campaigns peak during Diwali week, Mobupps data shows that the two to four weeks immediately following Diwali often drive higher ROI, especially for apps that implement well-timed retargeting strategies.

As new users begin to explore their recently downloaded apps and wind down from the season, brands and developers have a new opportunity to deepen engagement and increase lifetime value.

Push notifications played a critical role in festive campaign performance, and timing and context were essential for success. During Diwali, Wednesday and Thursday evenings (6–9 PM IST) saw a 28% lift in conversions when emotion-led messaging was paired with flash offers.

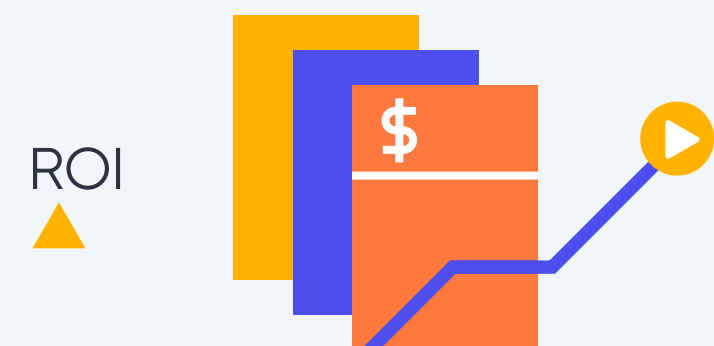
Navratri engagement peaked during Monday–Tuesday lunch hours (12–2 PM), where festive-themed content drove a 21% uplift.

Christmas weekend delivered the strongest retargeting results, with Friday to Sunday evenings (7–10 PM) yielding a 30% conversion rate increase through gifting-focused messages and referral incentives. Aligning push message strategy with cultural context and behavioral rhythms significantly improves campaign results.

PERIOD	BEST RETARGETING DAYS	PUSH TIMING (IST)	CR UPLIFT	STRATEGY USED
Diwali Week	WED-THU	6:00–9:00PM	28%	Flash offers & emotion-led push
Navratri	MON-TUE	12:00–2:00PM	21%	Festive snackable content
Christmas Week	FRI-SUN	7:00–10:00PM	30%	Gifting + referral bonus

2-4

Weeks immediately following Diwali drive higher ROI



Source: Mobupps

Between November 15 and December 15, Mobupps observed:

- ▶ **A 32% lift** in re-engagement rates across shopping and finance apps.
- ▶ **A 19% lower cost** per re-engaged user versus new user acquisition.
- ▶ **Higher conversion rates** from email, push notifications, and retargeted ads that feature time-sensitive offers or personalized incentives.



Remarketing is where performance marketers rise above their brand-led competitors. The most efficient Q4 campaigns weren't necessarily the biggest, but they were the most persistent, especially after the big push.



Simi Mathews
Regional Sales Lead, India



Strategic recommendations

The 2024 festive season offered a clear lesson for marketers: Scale alone is no longer enough.

Brands that outperformed may not have been the loudest or most visible; they were the most adaptive, using data, creative agility, and performance discipline to meet users at every phase of their festive journey.

Based on insights from Mobupps, Sensor Tower, and Singular, here are five strategic imperatives for marketers heading into festive season 2025.

01

Treat Q4 as a full-funnel opportunity

Start early to build awareness and intent, then shift campaign focus to acquisition, conversion, and retention. Align messaging and creative across all campaign phases, from pre-festival promotions to post-Diwali re-engagement.

- ▶ **PRO TIP:** Build out a three-phase marketing calendar: pre-festive (awareness), festive (acquisition and conversion), and post-festive (retention and upsell).

02

Refresh creative weekly and localize aggressively

Creative fatigue sets in fast during the festive cycle, when shoppers are more bombarded with ads than usual. The best-performing campaigns in 2024 used local language variants, culturally specific imagery, and fresh formats – and they updated creative assets every 7–10 days.

- ▶ **PRO TIP:** Invest in AI-powered creative tools for rapid iteration and testing.

03

Expand your media mix beyond the duopoly

While Meta and Google remain key players, the fastest-growing performance channels included programmatic, OEM placements, and influencer campaigns. These channels tended to deliver lower CPIs and stronger ROAS, particularly in non-metro markets.

▶ **PRO TIP:** Earmark 20–30 % of your Q4 budget for testing emerging or alternative platforms.

04

Prioritize remarketing and lifecycle campaigns

The post-Diwali period represents an untapped window of performance opportunity! Re-engagement and upsell campaigns, especially those featuring fresh messaging, produced some of the strongest returns of the season.

▶ **PRO TIP:** Plan ahead for post-Diwali retargeting campaigns in 2025. In-app advertising may perform particularly well in these campaigns.

05

Anchor every campaign in performance analytics

The strongest festive campaigns were built on precise data, including creative analytics, cohort performance, and incrementality. Top performers in 2024 used this intelligence to shift their spend dynamically and extend high-performing campaigns.

▶ **PRO TIP:** Partner with analytics platforms that integrate creative performance with media data to drive smarter decisions.



Irrfan shaik
Strategic Partnerships



The Indian festive season represents one of the most dynamic advertising environments in the world. Success depends not just on planning, but on the ability to adapt in real time, based on data, creative insight, and changing consumer behavior. For that, marketers need a reliable source of truth!

Conclusion



As mobile penetration continues to grow in India, the festive season gains importance, not only as a commercial event, but as a litmus test for mobile marketing excellence.

With billions of impressions, millions of installs, and heightened consumer intent compressed into a 12-week window, this is where strategies can be tested, and growth opportunities may be seized, and performance gaps painfully exposed.

The 2024 season reinforced that winning during the festive quarter is not about budget alone. It's about execution. The brands that came out on top were those that invested early, refreshed creative frequently, diversified their media mix, and treated re-engagement as an essential phase rather than an afterthought.

As you prepare for the 2025 festive cycle, the insights in this report can serve as both a benchmark and a roadmap. Use them to sharpen your strategy, stretch your creative thinking, and double down on the performance levers that matter most.





Singular is the only end-to-end marketing attribution and analytics platform that uncovers true ROI across all marketing channels.

We transform complex marketing data into actionable insights by unifying campaign data from thousands of channels with cross-device attribution data.

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