Sensor Tower Report

State of India Mobile App Market 2026

Executive Summary | India App Market Key Takeaways

01

India Remains Unmatched in Mobile App Scale

India continues to be the world's largest mobile app market by volume. While downloads have stabilized since 2025, overall activity remains structurally strong, reflecting a mature but resilient user base.

02

Growth Shifts from Acquisition to Habit

As smartphone adoption matures, growth is no longer install-led. India's leading apps now compete on frequency, retention, and everyday utility—turning payments, commerce, content, and mobility into daily habits.

03

Non-Gaming Apps Anchor the Economy

Non-gaming apps now underpin India's app economy. Finance, short-form entertainment, education, AI, and quick commerce drive monetization through subscriptions, high-frequency usage, and service-led value beyond entertainment spend.

04

Localization And Regionalization Define Category Leaders

India's fastest growth comes from Tier-2 and Tier-3 cities. Apps that localize language, pricing, logistics, and content outperform metro-first strategies and capture the next wave of long-term users.

05

Incumbents Defend Scale, Challengers Gain Share

Category leaders retain scale, but momentum favors focused challengers. Across commerce, finance, and mobility, mobile-native players win share by solving specific, high-frequency needs better than broad incumbents.

06

Execution Defines Leadership in India

In India's competitive app market, leadership depends on execution—not reach alone. Winners pair scale with differentiation through speed, affordability, video-first formats, or localized use cases that sustain repeat engagement.

Executive Summary | 2025 India Mobile App Landscape at a Glance

New App Downloads

25.5

Billion

+4.0%

YoY Growth

iOS & Google Play

48,000 apps
downloaded per minute
in 2025

In-App Purchase (IAP) Revenue

$1.0

Billion

+27%

YoY Growth

iOS& Google Play.
Revenue is gross, inclusive of any percent taken by the app stores.

USD $2,000 spent
per minute
in 2025

Total Hours Spent

1.23

Trillion

+9.0%

YoY Growth

iOS & Android Phones

>840 hours on average
for every person in India
in 2025

Average Time Spent per User

3.4

Hours Per Day

+2.4%

YoY Growth

iOS & Android Across 60+ Markets (Excludes China)

>12 minutes
Per waking hour

of Apps Used per user

23

Per Month

+3.0%

YoY Growth

iOS & Android Across 60+ Markets (Excludes China)

8 unique apps
used each day per user
on average

Contents

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.

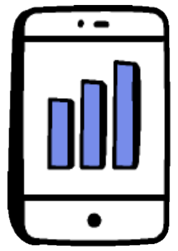
Press Inquiries: press-apac@sensortower.com
Business Inquiries: sales@sensortower.com

Sensor Tower | Our Customers

Indian market leaders **trust Sensor Tower** insights to grow their business

zomato	SWIGGY	Delta. Exchange | INDIA	make my trip	OYO	PhonePe
SONY liv	peak xv	amazon	Groww	Pocket FM	MPL
DREAM11	Gameskraft	bb bigbasket	Google	meesho	ZUPEE
GAMEBERRY LABS	blinkit	PLAYSIMPLE	games 24x7	Kutumb	JioHotstar
BAJAJ FINSERV	Lokal	PREMJI INVEST	OLA	BOMBAY PLAY	FELICITY
instamart	Pi INVESTMENTS	Z5	PickMe	cricbuzz	Liquidnitro Games

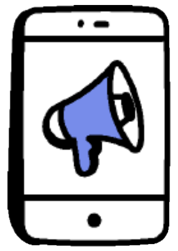
Sensor Tower
Solutions



Sensor Tower
App Performance Insights

For those who need visibility into the mobile app ecosystem.

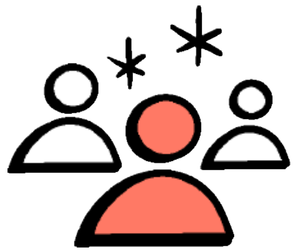
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



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.

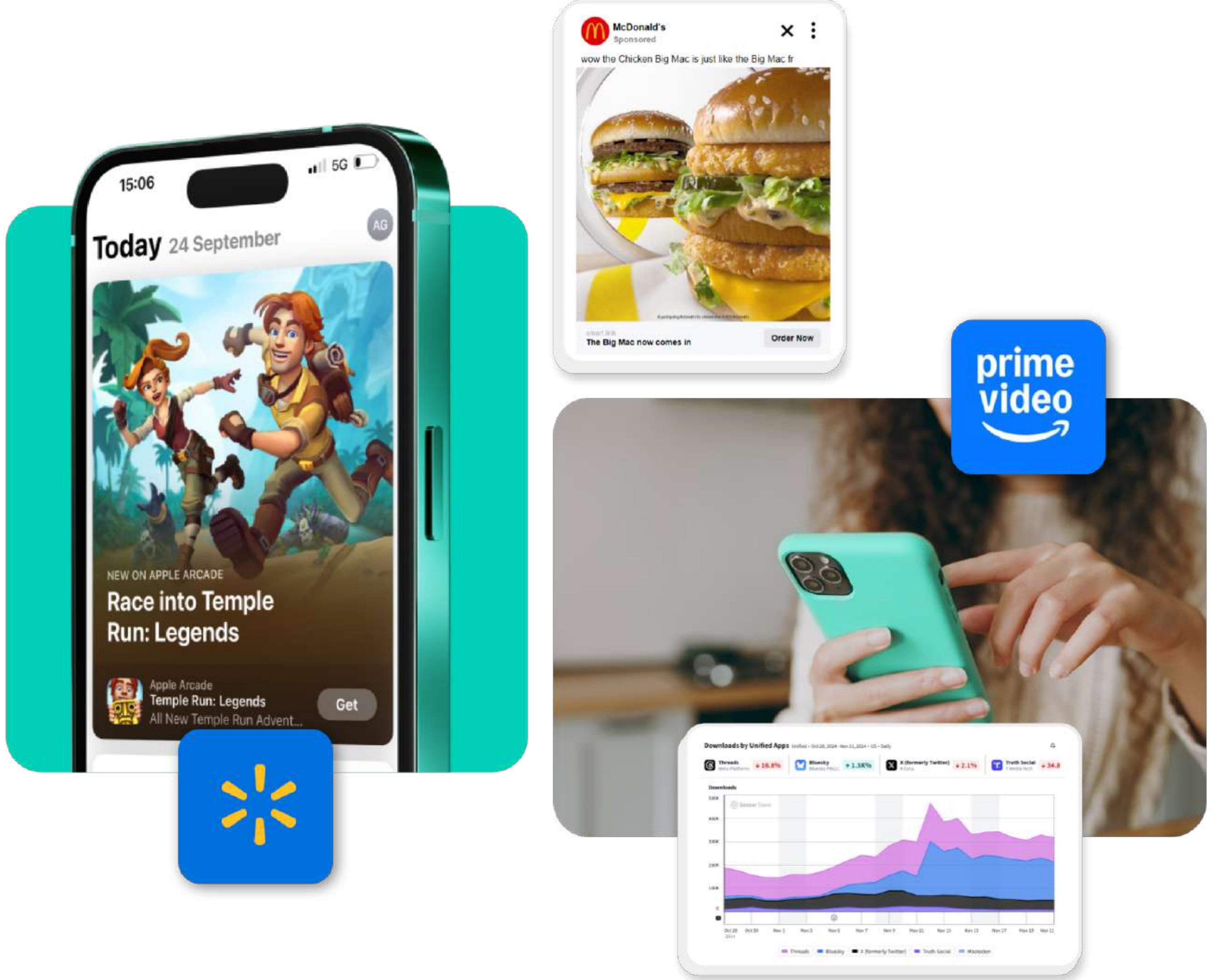
Sensor Tower
Executive Summary

This report delivers a comprehensive view of India's mobile app ecosystem, highlighting how scale is translating into engagement and monetization across key verticals. It examines recent trends in app downloads, consumer spend, and time spent across major categories such as shopping, financial services and quick commerce, alongside fast-emerging segments such as short-drama, education and mobility.

Leveraging Sensor Tower's App Performance and Advertising Insights, the report also explores how leading apps are driving growth through category-specific strategies—ranging from regional expansion and product specialization to partnerships and digital advertising. Together, these insights illustrate how India's mobile market is evolving from acquisition-led growth toward more sustainable, value-driven app ecosystems.

Clarification on Revenue and Downloads Data

Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app- store sales, and direct payment revenue from developers' websites and other channels. Unless explicitly stated as net revenue, the revenue figures shown represent gross revenue (before platform deduction). 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.



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

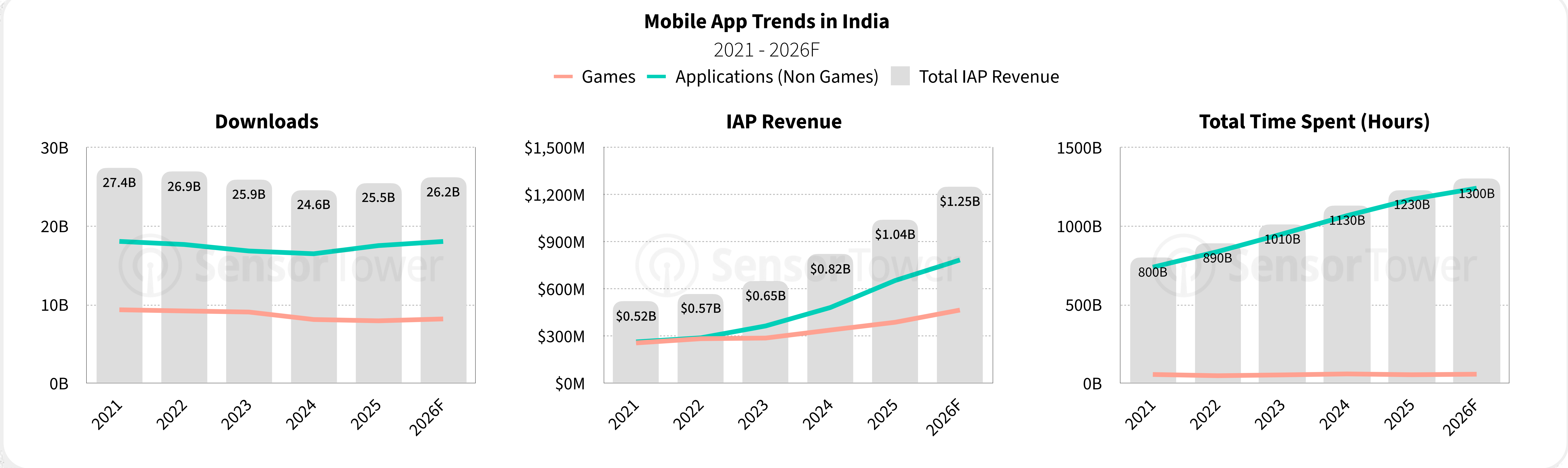
	Desktop Display and Video	Facebook Instragram	LINE	Linkedin	Mobile App Ad Networks	Mobile Display and Video	OTT	Pinterest	Reddit	Snapchat	TikTok	X	YouTube
United States	•	•		•	•	•	•	•	•	•	•	•	•
Australia	•	•				•		•	•	•	•		•
Brazil		•		•				•	•		•	•	
Canada	•	•		•	•	•		•	•	•	•		•
France		•		•				•	•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

Macro Mobile Trends

India’s App Market Outlook for 2026

India: The World's Largest Mobile Market Enters a Value-Driven Phase

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
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. Revenue is gross — inclusive of any percent taken by the app stores.



India remains the world's largest mobile market, generating around **25 billion downloads annually**. Growth stabilized in 2025 as the market matured, with volumes expected to remain resilient and positive into 2026—supported by sustained usage, retention, and repeat engagement across essential, habit-forming apps.

With scale firmly in place, India has entered a monetization-led phase. Annual IAP revenue **surpassed $1 billion in 2025** and is **projected to reach $1.25 billion by end of 2026**. Growth is increasingly driven by premium services, subscriptions, and higher-value users, with non-gaming apps accounting for a rising share of total consumer spend.

Engagement reinforces this transition, with total annual time spent exceeding **1.3 trillion hours by 2026**. Non-gaming apps underpin this growth by embedding daily use across payments, commerce, communication, and services—supporting a more durable, long-term value creation model.

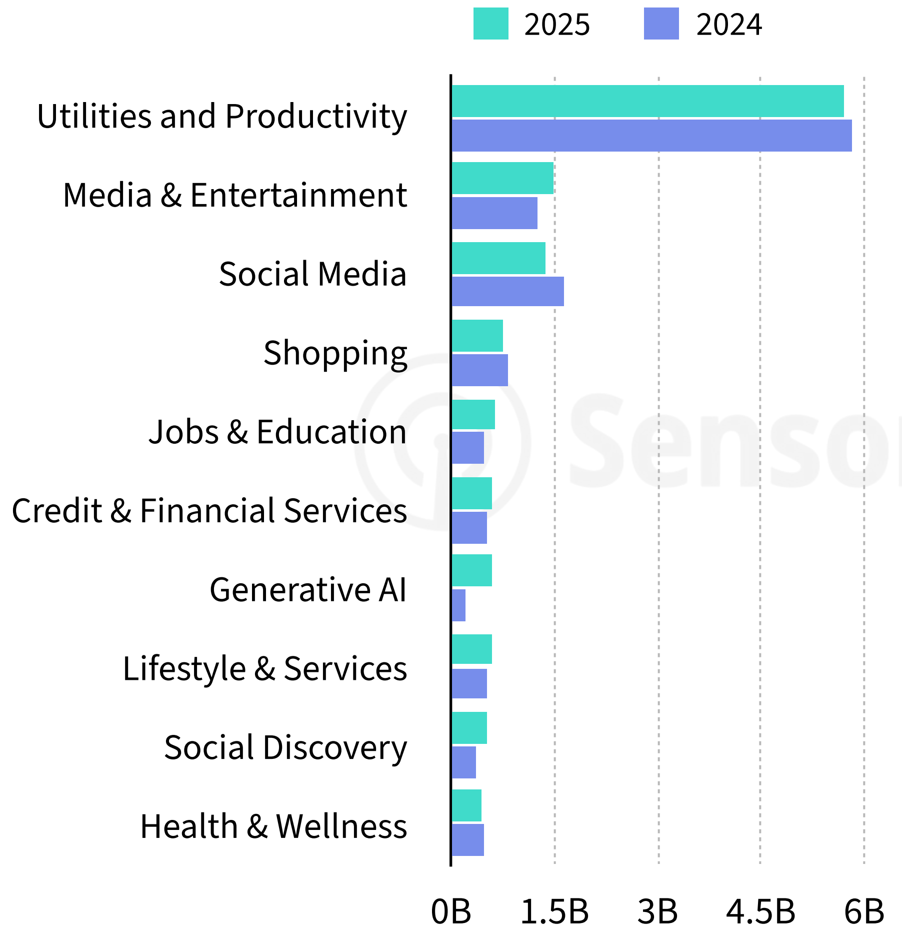
Which Categories are Driving Downloads Growth In India?
Utility-led Downloads as Generative AI and Emerging Categories Drive Growth

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined, excluding pre-installs, re-downloads, and third-party Android stores. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

India's mobile app downloads remain anchored by **Utilities and Productivity**, which account for over one-third of total installs in 2025. **Media & Entertainment** and **Social Media** continue to contribute meaningful volume, while **Shopping**, **Jobs & Education**, and **Financial Services** remain important to overall demand. This mix reflects a mature market where essential, everyday apps sustain scale as category breadth expands.

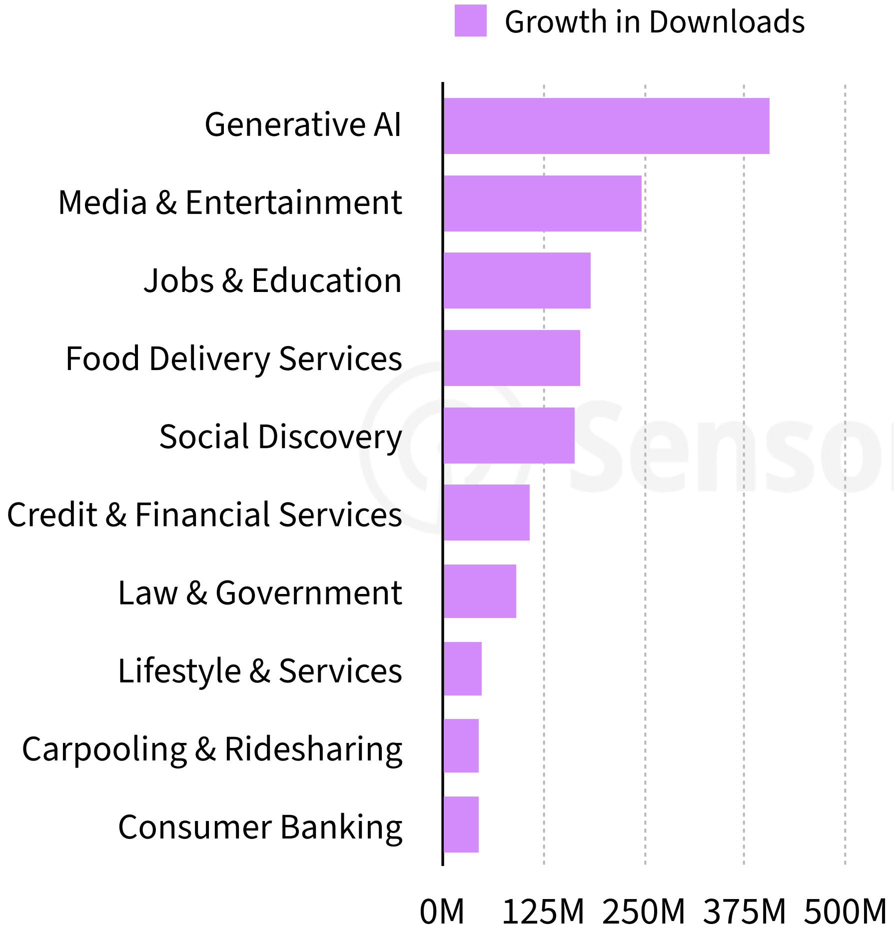
Download growth is increasingly driven by faster-rising categories rather than the largest ones. **Generative AI** leads absolute growth, followed by **Media & Entertainment**, **Jobs & Education**, **Food Delivery Services**, and **Social Discovery**, highlighting rising demand for content, learning, and connection. **Credit & Financial** Services also continue to outpace the broader market, reinforcing India's shift toward utility-led scale complemented by emerging use cases.

India Top App Categories by Downloads



	Downloads	YoY	#1 App By Downloads
Utilities and Productivity	5.7 B	-2%	Truecaller
Media & Entertainment	1.5 B	+20%	Kuku TV
Social Media	1.4 B	-17%	Instagram
Shopping	751.4 M	-10%	Meesho
Jobs & Education	647.7 M	+39%	Seekho
Credit & Financial Services	609.3 M	+22%	Navi
Generative AI	601.5 M	+205%	ChatGPT
Lifestyle & Services	584 M	+9%	Astrotalk
Social Discovery	531.6 M	+45%	FRND
Health & Wellness	447 M	-10%	NoiseFit

India Top App Categories by Downloads Growth 2025 vs 2024



	Growth	YoY	#1 App By Downloads
Generative AI	+404 M	+205%	ChatGPT
Media & Entertainment	+246.5 M	+20%	Kuku TV
Jobs & Education	+183.3 M	+39%	Seekho
Food Delivery Services	+169.6 M	+72%	Blinkit
Social Discovery	+164.3 M	+45%	FRND
Credit & Financial Services	+108 M	+22%	Navi
Law & Government	+90.1 M	+32%	DigiLocker
Lifestyle & Services	+48.5 M	+9%	Astrotalk
Carpooling & Ridesharing	+45.7 M	+34%	Rapido
Consumer Banking	+44.6 M	+16%	Kotak Bank: 811

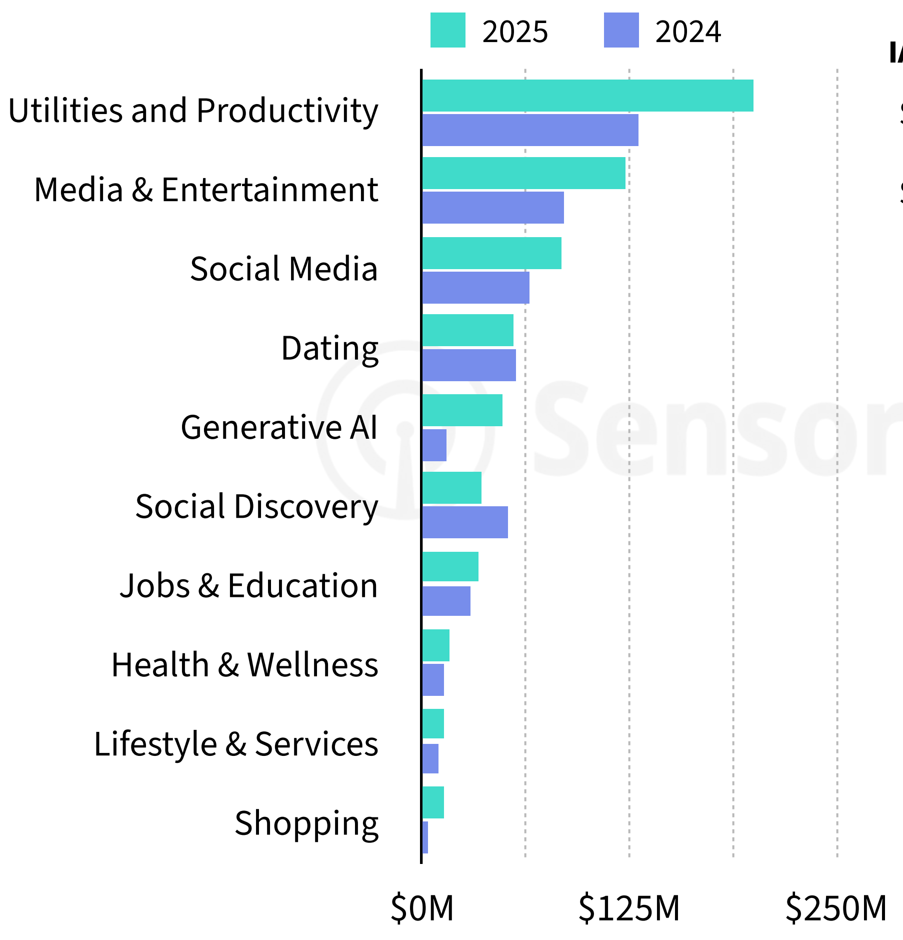
Which Categories Drive Revenue in India—and Where Is Growth Accelerating? Utilities and Media Anchor Revenue as Growth Diversifies

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

India's in-app purchase revenue remains concentrated in a small set of scaled categories. **Utilities & Productivity** leads in 2025, driven by subscription-led services such as cloud storage, while **Media & Entertainment and Social Media** continue to monetize content consumption at scale. Together, these categories anchor India's paid app economy.

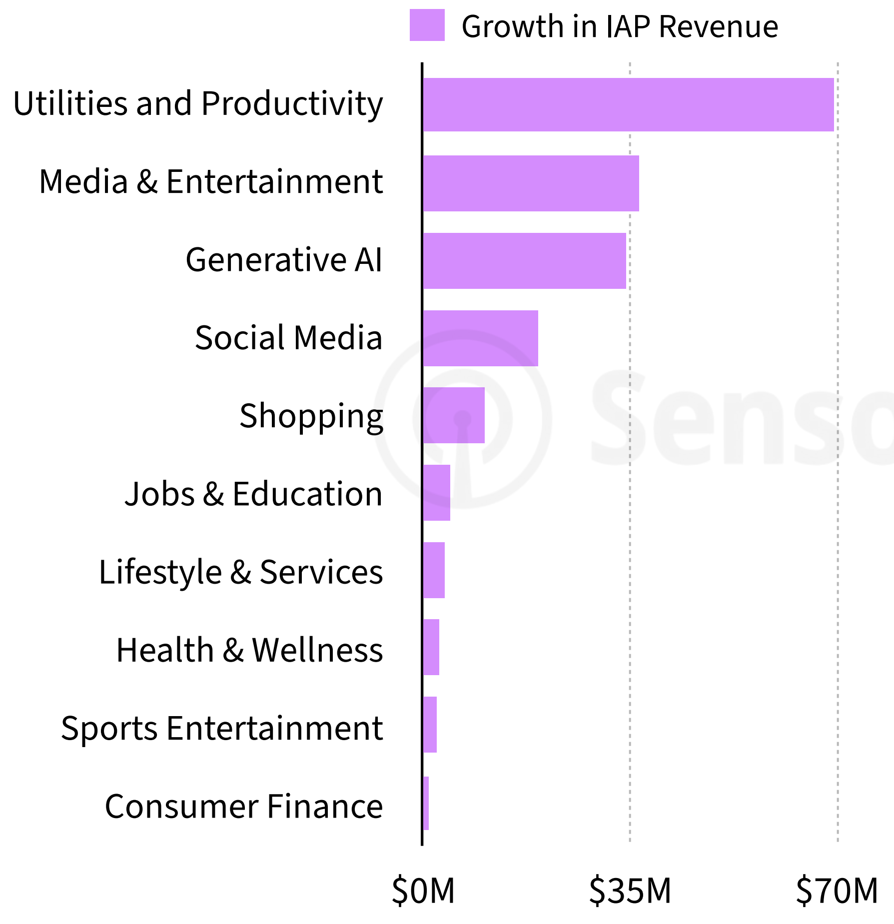
At the same time, monetization models are broadening across emerging subgenres. **Generative AI** delivers outsized IAP growth from a smaller base, while **Shopping** stands out as platforms increasingly sell premium memberships and content via in-app subscriptions. *Amazon*'s use of IAP to distribute bundled benefits and content subscriptions highlights how commerce apps are converting scale into recurring revenue.

India Top App Categories by IAP Revenue



	IAP Revenue	YoY	#1 App By Revenue
Utilities and Productivity	$200.2 M	+53%	Google One
Media & Entertainment	$122.6 M	+43%	Sony LIV
Social Media	$84.4 M	+30%	YouTube
Dating	$55.6 M	-1%	Bumble
Generative AI	$48.4 M	+242%	ChatGPT
Social Discovery	$35.7 M	-30%	ChillChat
Jobs & Education	$34.5 M	+15%	LinkedIn
Health & Wellness	$16.1 M	+21%	Dancefitme
Lifestyle & Services	$13.5 M	+33%	FlashGet Kids
Shopping	$13.4 M	+358%	Amazon Shopping

India Top App Categories by IAP Revenue Growth 2025 vs 2024



	Growth	YoY	#1 App By Revenue
Utilities and Productivity	+$69.4 M	+53%	Google One
Media & Entertainment	+$36.7 M	+43%	Sony LIV
Generative AI	+$34.3 M	+242%	ChatGPT
Social Media	+$19.6 M	+30%	YouTube
Shopping	+$10.5 M	+358%	Amazon Shopping
Jobs & Education	+$4.6 M	+15%	LinkedIn
Lifestyle & Services	+$3.4 M	+33%	FlashGet
Health & Wellness	+$2.8 M	+21%	Dancefitme
Sports Entertainment	+$2 M	+85%	FanCode
Consumer Finance	+$1.1 M	+16%	TradingView

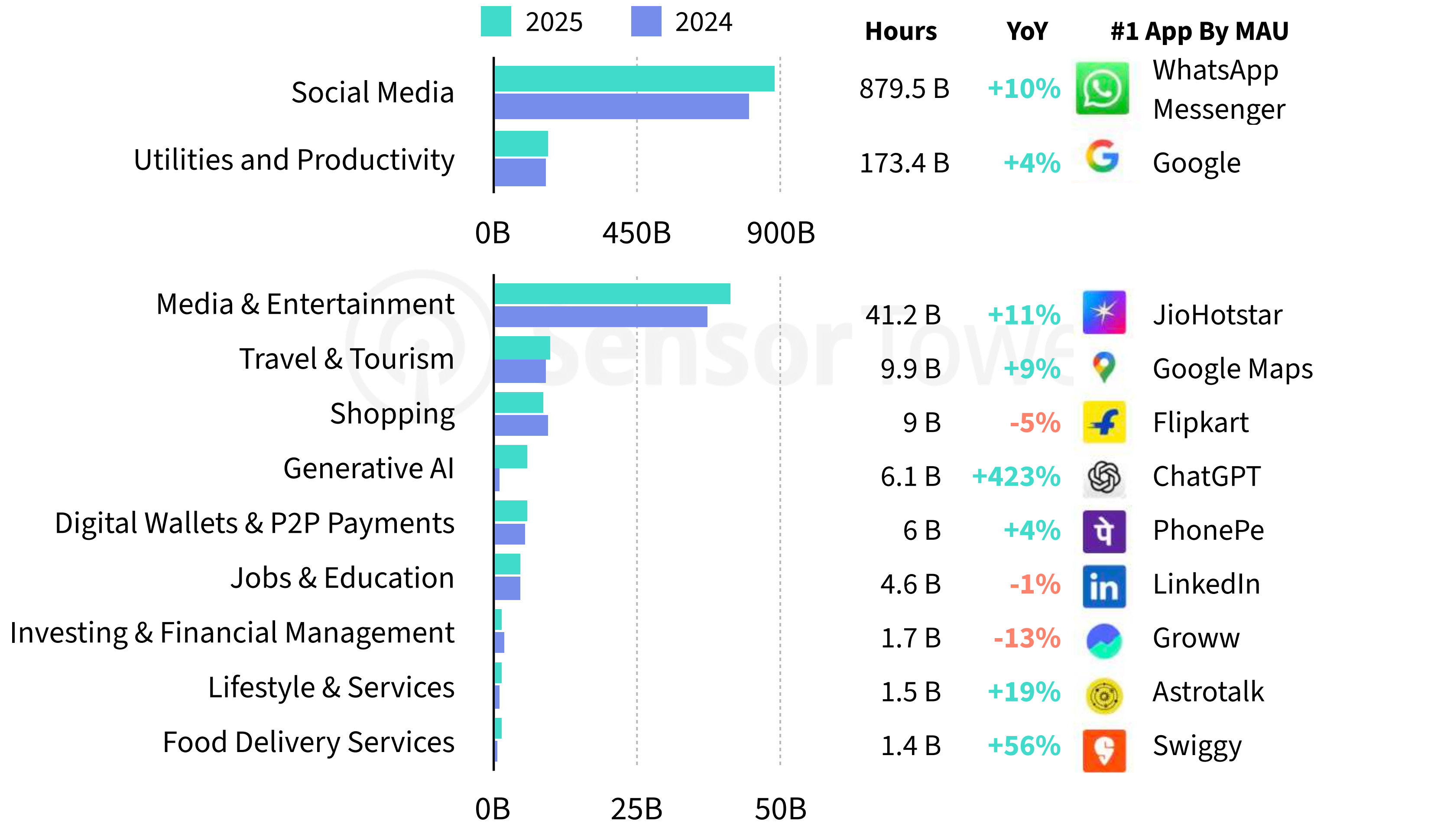
Which Categories Drive Engagement?
Generative AI, Food Delivery, and Rideshare Gain Momentum in India

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

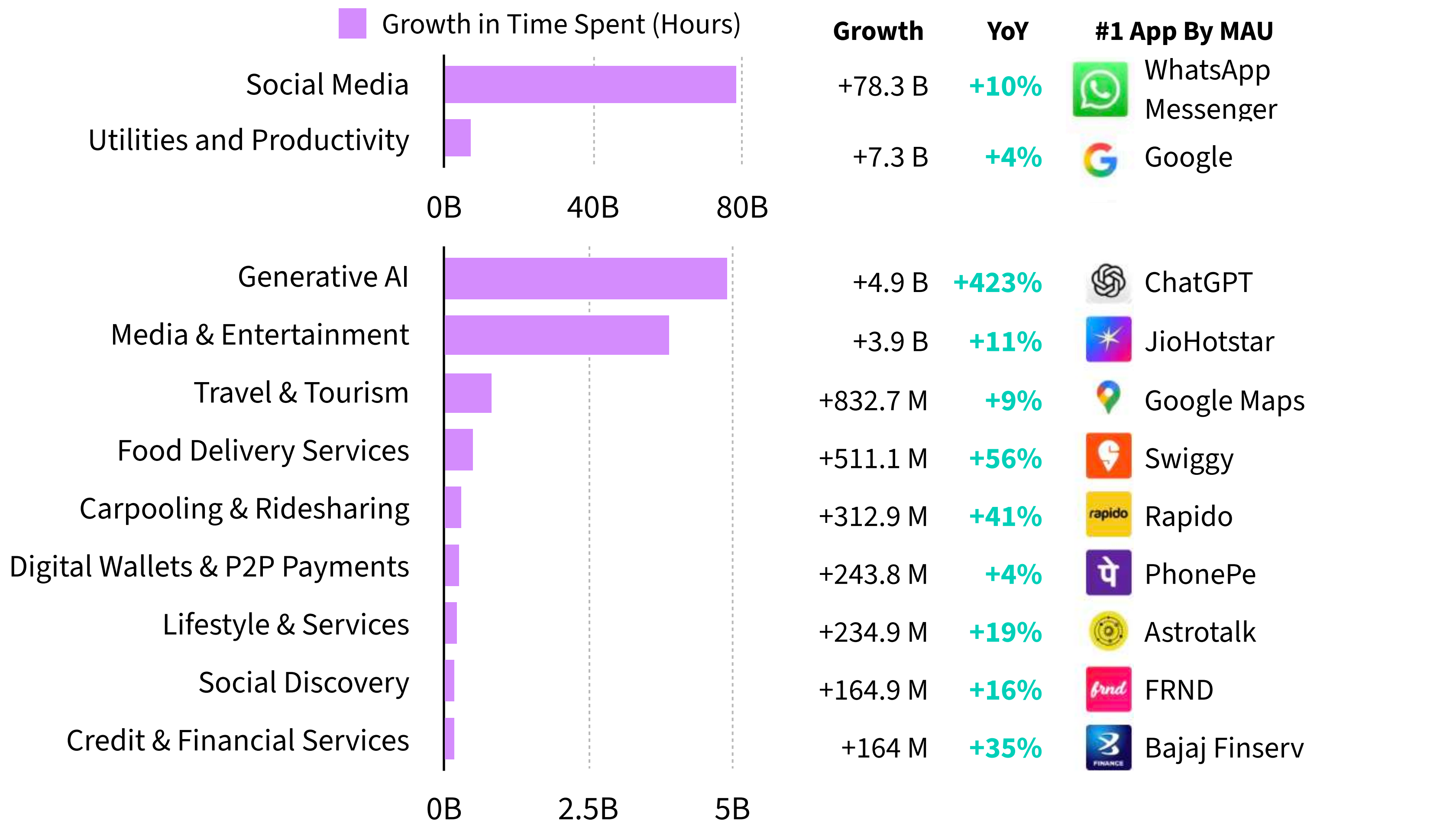
India's total mobile time spent remains concentrated in **Social Media** and **Utilities & Productivity,** reflecting deeply embedded daily usage. Messaging, search, and core utility apps continue to command the largest share of attention, reinforcing their role as the foundation of India's mobile engagement.

Growth, however, is coming from newer behaviors. **Generative AI** shows the fastest time-spent expansion, while **Media & Entertainment**, **Travel**, **Food Delivery**, and **Mobility** apps benefit as users deepen usage around convenience, content, and on-demand services. Together, these categories are extending engagement beyond communication into lifestyle and task-driven use cases.

India Top App Categories by Total Time Spent



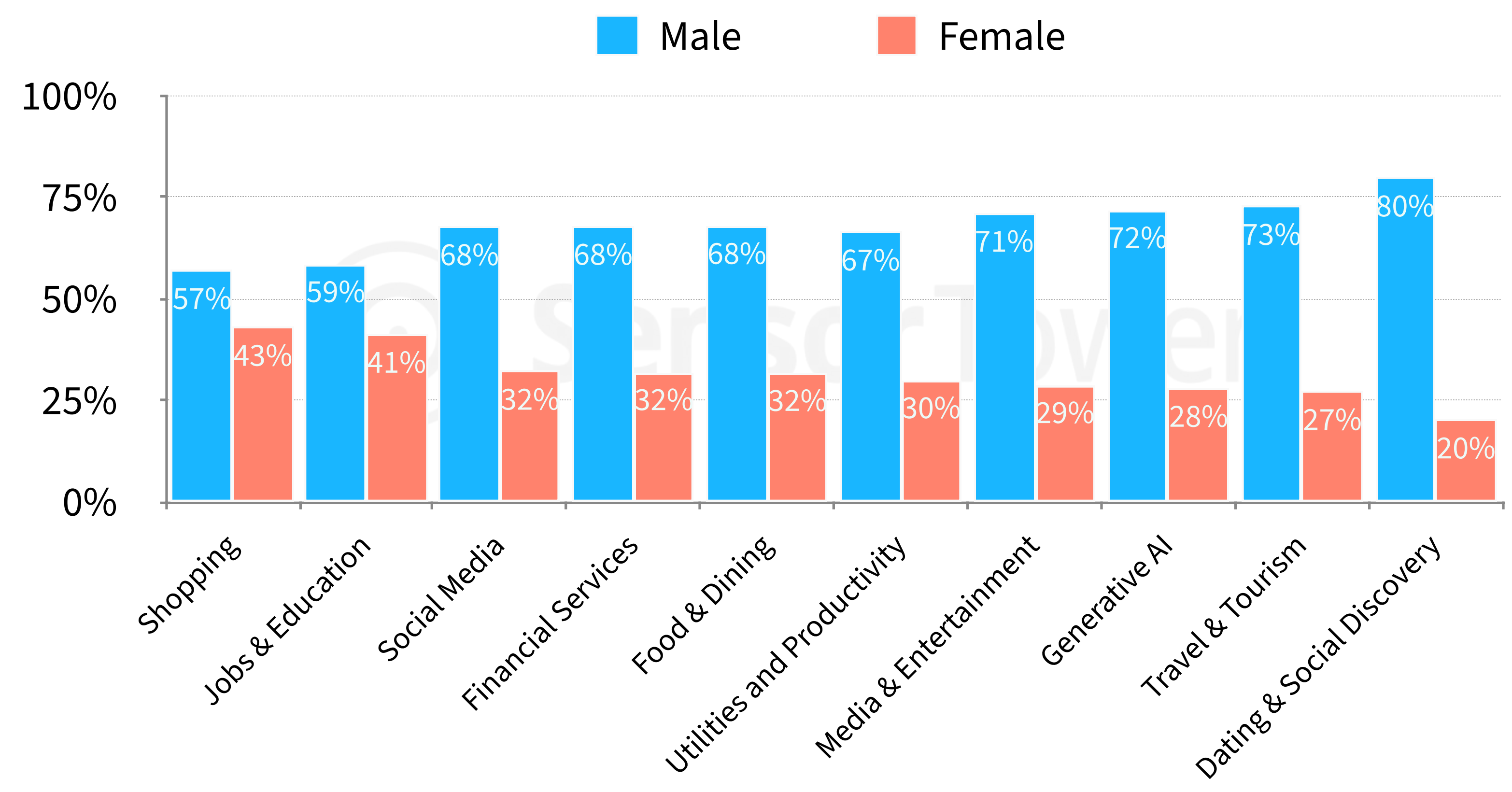
India Top App Categories by Time Spent Growth 2025 vs 2024



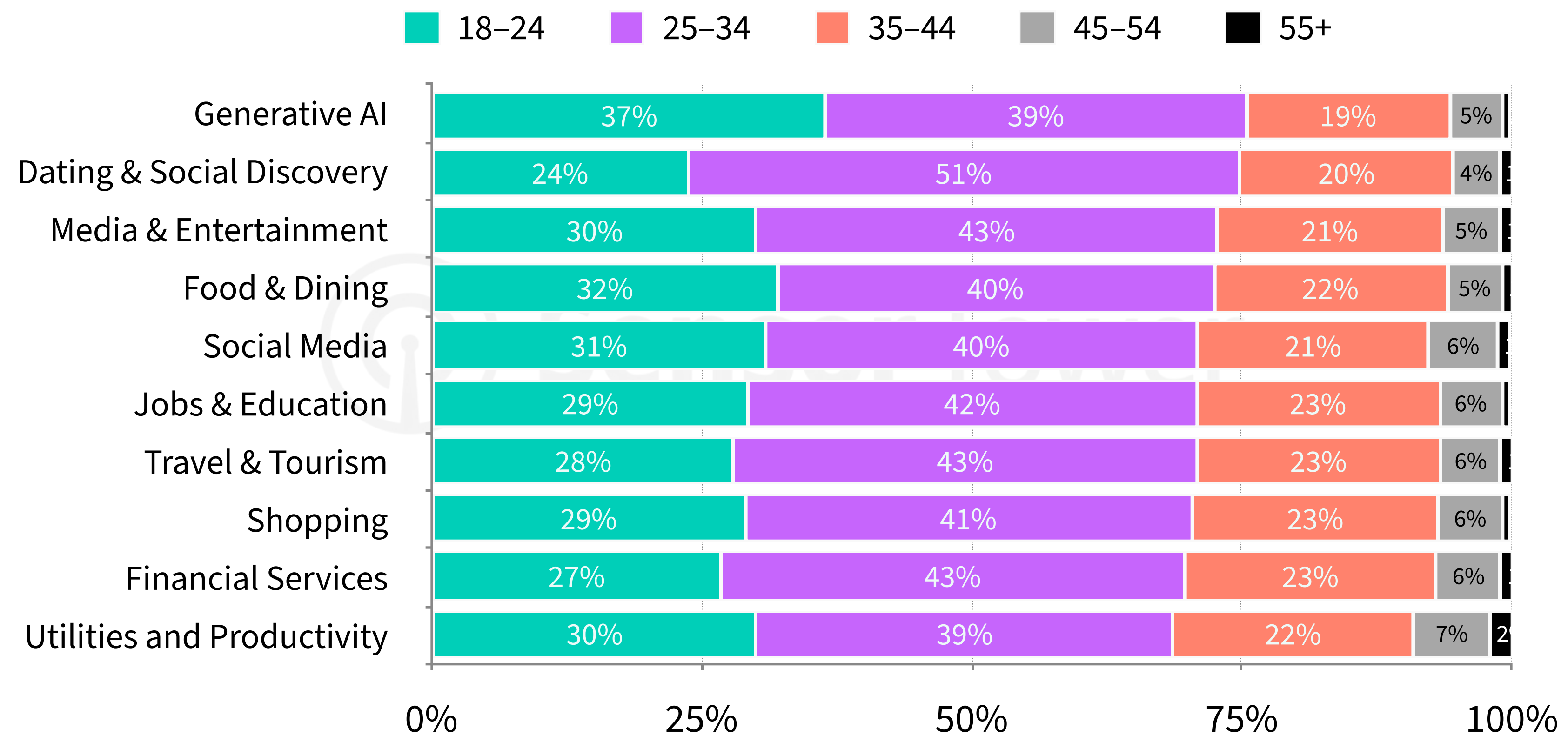
Who Uses Mobile Apps? India's App Audiences Skew Young and Male—But Demographics Vary Sharply by Category

Source: Sensor Tower Audience Insights. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.
Gender represented as Male and Female only and is not representative of all gender identities.

India gender group percentage By Category Q4 2025



India age group percentage By Category Q4 2025



Across India's app ecosystem, usage remains **male**-skewed in most categories, with the imbalance most pronounced in **Dating, Travel & Tourism, Generative AI, and Media & Entertainment**, where **men account for roughly 70–80% of users**. **Shopping** is the closest to gender parity, while **Jobs & Education and Social Media** show comparatively **higher female participation**—reflecting broader, utility-driven and everyday engagement patterns.

Age splits reinforce India's youth-led app economy. The **18–24 and 25–34 cohorts dominate** across nearly all categories, particularly in **Dating and Generative AI**, which skew heavily under-35. By contrast, **Financial Services, Travel, and Utilities** attract a relatively older mix, with a larger share of users aged **35–44 and above**—highlighting how life stage, income, and use-case maturity increasingly shape category adoption.

Top Rankings

India’s Leading Apps in 2025

India's 2025 Breakout Apps Highlight New Growth Engines Across Content, Commerce, and Learning

India's most downloaded apps in 2025 show where user momentum is forming next. Established social platforms still underpin reach, but growth is increasingly coming from AI tools, short-form video, quick commerce, financial services and practical learning apps built around clear, repeatable use cases.

Short-drama platforms such as _Kuku TV_ and _Story TV_ reflect rising demand for episodic, mobile-native viewing. Alongside apps like _ChatGPT_, _Seekho_, and _Instamart_, adoption is being driven by immediacy and utility—signaling a shift toward apps that solve specific needs quickly rather than maximize passive browsing time.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined, excluding pre-installs, re-downloads, and third-party Android stores. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

2025 India Top 15 Mobile Apps by Downloads

Unified • Jan 1, 2025 - December 31, 2025

Downloads

			vs Previous
1	Instagram	Social Media	=
2	ChatGPT	AI Assistant	▲ 48
3	Kuku TV	Short Drama	▲ 437
4	Meesho	Shopping	▼ 2
5	JioHotstar	OTT Streaming	▲ 8
6	Facebook	Social Media	▼ 3
7	Seekho	Professional Development	▲ 22
8	PhonePe	Digital Wallets & P2P Payments	▼ 3
9	WhatsApp	Social Messaging	▼ 5
10	Flipkart	Shopping	▼ 3
11	Snapchat	Social Media	▼ 2
12	Truecaller	Calling & SMS	▼ 4
13	Blinkit	Grocery Delivery	▲ 41
14	Google Gemini	AI Assistant	▲ 45
15	Airtel Thanks	Telecom	▲ 3

Downloads Growth

			vs Previous
1	ChatGPT	AI Assistant	▲ 48
2	Kuku TV	Short Drama	▲ 437
3	Seekho	Professional Development	▲ 22
4	Story TV	Short Drama	NEW
5	Perplexity	AI Assistant	⇑
6	Blinkit	Grocery Delivery	▲ 41
7	JioHotstar	OTT Streaming	▲ 8
8	Google Gemini	AI Assistant	▲ 45
9	Instamart	Grocery Delivery	NEW
10	QuickTV	Short Drama	NEW
11	AadhaarFaceRD	2FA & Passwords	▲ 94
12	mAst Lite	Video Editing	▲ 268
13	Navi	Financial Services	▲ 46
14	Edits	Video Editing	NEW
15	bigbasket	Grocery Delivery	▲ 58

India's Top Revenue Apps Show Monetization Shifting Toward Subscriptions and Premium Services

India's top-grossing apps in 2025 highlight a clear shift toward paid, subscription-driven models. Utilities and productivity services—led by Google One and ChatGPT—anchor the revenue rankings, while platforms such as LinkedIn, YouTube, and Sony LIV demonstrate sustained willingness to pay for professional tools, premium content, and enhanced digital experiences.

Revenue growth, meanwhile, is being driven by habit-forming platforms that convert scale into recurring spend. Subscription-led apps like ChatGPT and Amazon Prime Video continue to accelerate paid adoption, while OTT and short-drama platforms—including DramaBox and Dramawave—underscore how mobile-first entertainment is translating engagement into repeat monetization.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

2025 India Top 15 Mobile Apps by Revenue Unified • Jan 1, 2025 - December 31, 2025

Revenue

			vs Previous
1	Google One	Cloud Storage	=
2	ChatGPT	AI Assistant	▲ 9
3	LinkedIn	Jobs & Education	▼ 1
4	YouTube	Social Media	▼ 1
5	Sony LIV	OTT Streaming	▲ 2
6	Facebook	Social Media	▲ 9
7	Amazon Shopping	Shopping	▲ 23
8	Amazon Prime Video	OTT Streaming	▲ 21
9	JioHotstar	OTT Streaming	▼ 3
10	Instagram	Social Media	▼ 1
11	Bumble	Dating	▼ 7
12	Truecaller	Calling & SMS	▼ 2
13	Tinder	Dating	▼ 5
14	Canva	Poster & Card Design	▼ 2
15	Gmail	Email	▲ 2

Revenue Growth

			vs Previous
1	Google One	Cloud Storage	=
2	ChatGPT	AI Assistant	▲ 9
3	Amazon Shopping	Shopping	▲ 23
4	Facebook	Social Media	▲ 9
5	Amazon Prime Video	OTT Streaming	▲ 21
6	Sony LIV	OTT Streaming	▲ 2
7	YouTube	Social Media	▼ 1
8	Snapchat	Social Media	▲ 6
9	Instagram	Social Media	▼ 1
10	Gmail	Email	▲ 2
11	WePlay	Social Media	▲ 14
12	DramaBox	Short Drama	▲ 2
13	TeraBox	Cloud Storage	▲ 11
14	Dramawave	Short Drama	▲ 332
15	Hinge Dating App	Dating	▼ 2

India 2025: Utility-Led Platforms Anchor Scale as OTT and AI Drive Growth

India's active user base in 2025 remains anchored by communication and utility apps that sit at the core of daily mobile behavior. WhatsApp, YouTube, Instagram, Facebook, Telegram, and PhonePe continue to rank among the largest apps by MAU, reflecting their role in messaging, content consumption, and everyday transactions at national scale.

User growth, by contrast, is being shaped by how often apps fit into daily routines. Entertainment platforms like JioHotstar sustain usage through live sports and regional exclusives, while AI assistants such as ChatGPT are becoming everyday productivity companions. These behaviors underscore how frequency and utility—not installs alone—are driving engagement gains.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

2025 India Top 15 Mobile Apps by Active Users Unified • Jan 1, 2025 - December 31, 2025

Monthly Active Users

			vs Previous
1	Google	Browsers	=
2	WhatsApp Messenger	Social Messaging	=
3	Google Chrome	Browsers	=
4	YouTube	Social Media	=
5	Gmail	Email	=
6	Google Maps	Navigation & Maps	=
7	Google Messages	Calling & SMS	▲ 2
8	Instagram	Social Media	▼ 1
9	Facebook	Social Media	▼ 1
10	Google Calendar	Calendars & Tasks	=
11	Telegram	Social Messaging	▲ 1
12	PhonePe	Digital Wallets & P2P Payments	▼ 1
13	Truecaller	Calling & SMS	=
14	JioHotstar	OTT Streaming	▲ 4
15	Digital Wellbeing	Utilities	▲ 13

Monthly Active Users Growth

			vs Previous
1	Digital Wellbeing	Utilities	▲ 13
2	JioHotstar	OTT Streaming	▲ 4
3	Google Messages	Calling & SMS	▲ 2
4	ChatGPT	AI Assistant	▲ 73
5	Google	Browsers	=
6	Samsung One UI Home	Utilities	▲ 9
7	Google Gemini	AI Assistant	▲ 38
8	WhatsApp Messenger	Social Messaging	=
9	Google Chrome	Browsers	=
10	Google Calendar	Calendars & Tasks	=
11	YouTube	Social Media	=
12	Instagram	Social Media	▼ 1
13	Gmail	Email	=
14	Telegram	Social Messaging	▲ 1
15	Google Photos	Photo Galleries	▲ 1

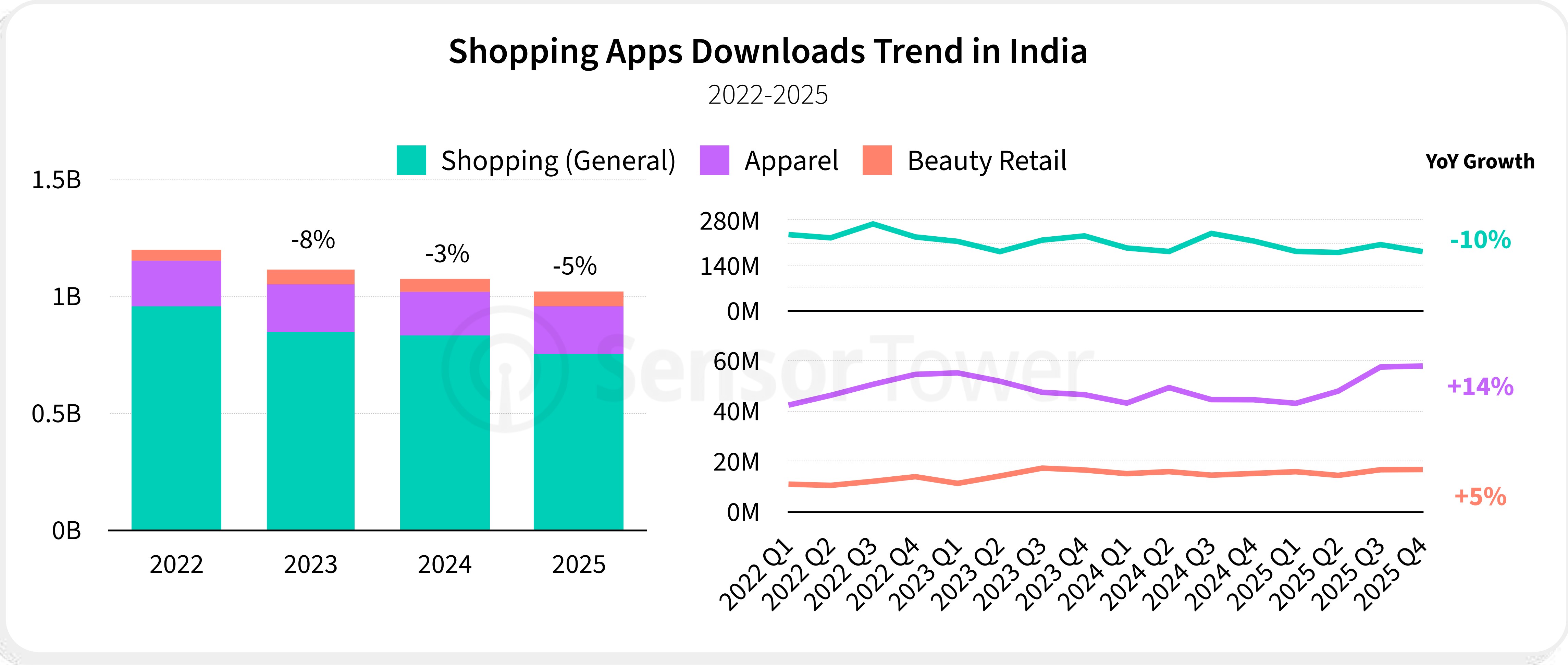
Shopping Apps

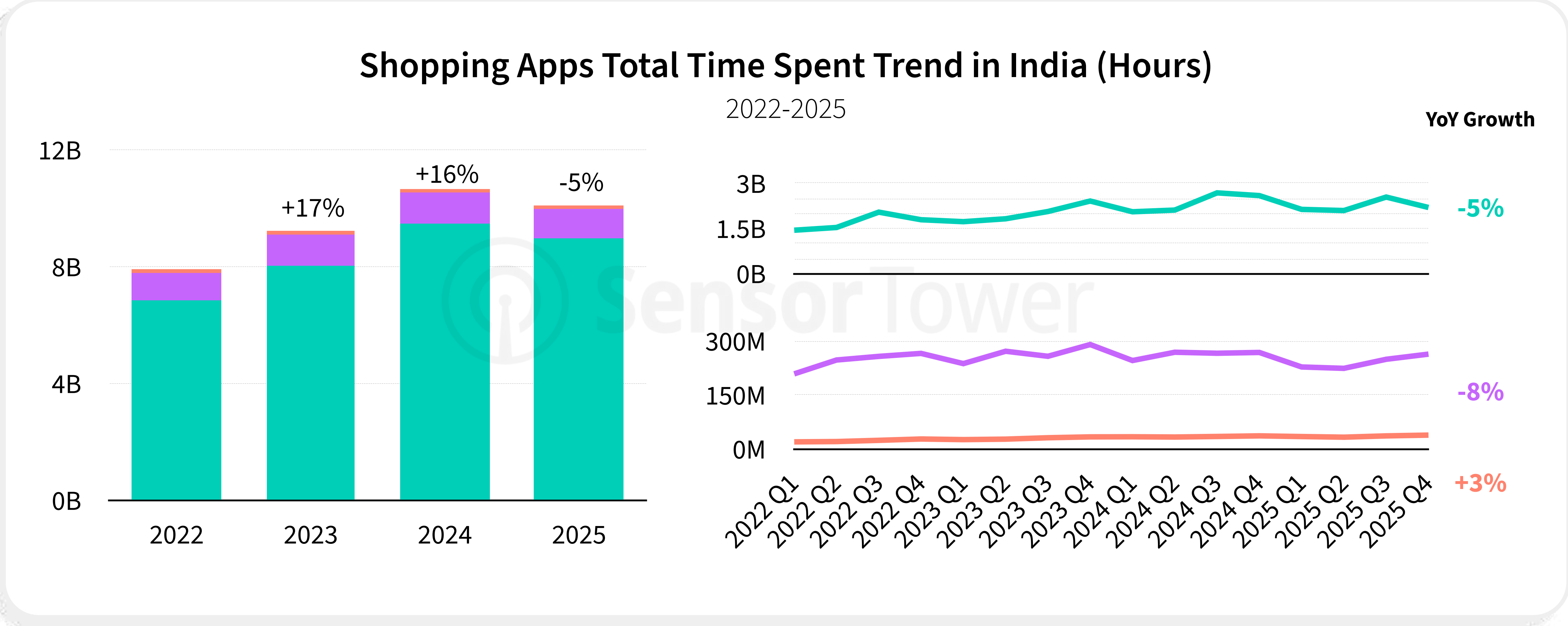
Digital Retail Expands Beyond Tier-1 Cities

India's Shopping Apps: Engagement Strengthens as Consumer Behavior Evolves

Downloads across general shopping and e-commerce apps moderated further in 2025, declining modestly versus 2024 as acquisition cooled among broad, multi-category retail platforms. In contrast, **Apparel** and **Beauty Retail** proved more resilient, with both categories continuing to post positive growth—highlighting sustained demand for specialized, category-led shopping experiences.

Engagement trends are increasingly polarized. While total time spent across general shopping apps declined slightly versus 2024, **Beauty Retail** continued to grow, supported by deeper adoption across Tier-2 and Tier-3 cities, even as broad e-commerce platforms saw sharper pullbacks. This divergence signals a shift toward fewer, more specialized apps with higher-intent usage, strengthening long-term foundations for monetization and customer value.





Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Apparel and Beauty Retail Emerge as Key Growth Drivers in India's Shopping Apps

India's core shopping apps remain largely stable, reflecting a mature, highly competitive market where incumbents such as Meesho, Flipkart, and Amazon continue to defend scale through pricing, assortment breadth, and logistics rather than rapid user expansion.

Momentum, however, is increasingly concentrated in Apparel and Beauty, where consumer behavior favors higher-intent, specialized experiences. Fashion platforms like Myntra and AJIO remain anchors, while international and niche players gain traction. In Beauty, apps led by Nykaa and Purplle—alongside fast-rising challengers such as Pilgrim, Innovist, and Kult—highlight growing demand for brand-led discovery, sampling, and repeat purchasing, extending engagement beyond general retail.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Shopping Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Shopping (General)

Rank	App	vs Previous
1	Meesho	=
2	Flipkart	=
3	Amazon	▲ 1
4	Shopsy	▼ 1
5	JioMart Online	▲ 6
6	Snapdeal	=
7	OLX India	▼ 2
8	POP	▲ 17
9	CityMall	=
10	FirstCry	▼ 3

Apparel

Rank	App	vs Previous
1	Myntra - Fashion Shopping App	=
2	AJIO Online Shopping App	=
3	Nykaa Fashion – Shopping App	=
4	SHEIN	NEW
5	Savana - UK Fashion	=
6	Lenskart : Eyeglasses & More	▼ 2
7	LimeRoad: Online Fashion Shop	▼ 1
8	H&M	=
9	Bewakoof - Online Shopping App	▲ 3
10	Pantaloons-Online Shopping App	▲ 4

Beauty Retail

Rank	App	vs Previous
1	Nykaa - Beauty Shopping App	▲ 1
2	Purplle Online Beauty Shopping	▼ 1
3	Tira: Online Beauty Shopping	=
4	Smytten-Try Samples & Shop	▲ 1
5	Mamaearth: Beauty Skincare App	▼ 1
6	My Forever India	=
7	Pilgrim India	▲ 4
8	Innovist: Hair, Skin, Sun Care	▲ 17
9	Vilvah Store Skin & Hair Care	▲ 3
10	Kult - Makeup/ Beauty Shopping	▲ 7

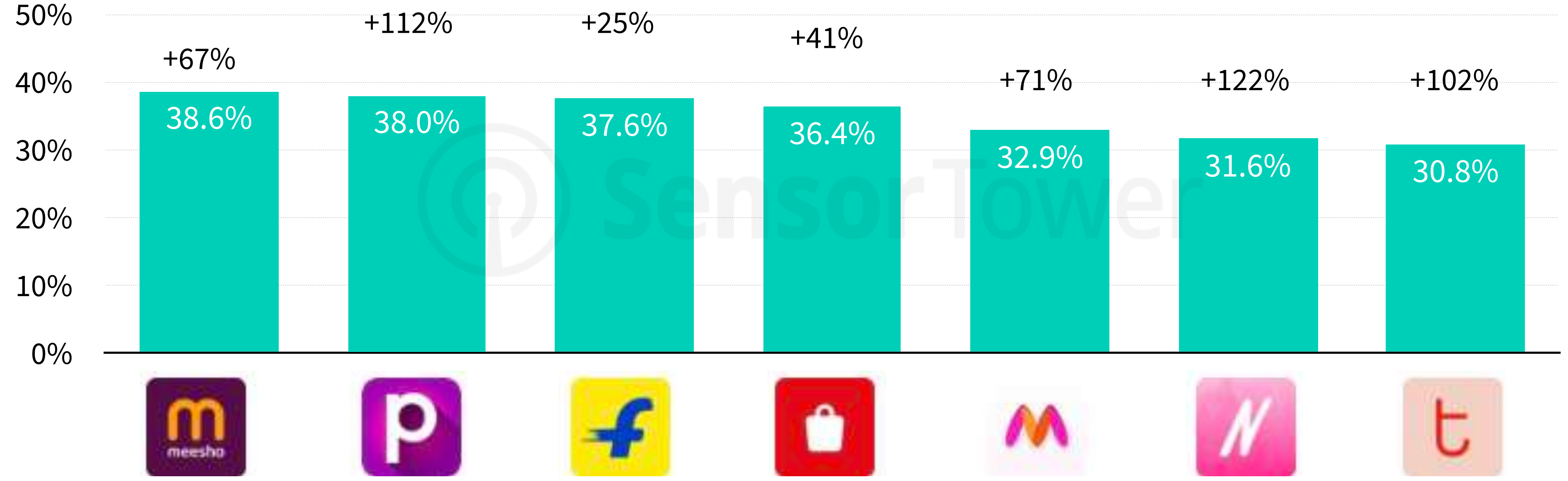
Tier-2 and Tier-3 Cities Power the Next Phase of Beauty and Fashion Growth

Beauty and fashion apps are increasingly drawing growth from Tier-2 and Tier-3 cities, where adoption is accelerating faster than in India's largest metros. For several leading platforms, regional users now account for over one-third of total active users—signaling a structural shift in where engagement and scale are being built.

This shift is especially pronounced among beauty-led players. *Purplle* stands out with one of the stronger Tier-2/3 skews in the category, translating into outsized regional growth. Cities such as **Kochi**, **Kozhikode**, and **Patna** are emerging as key demand centers, highlighting how localized assortments, value positioning, and regional marketing are redefining the growth playbook for fashion and beauty apps in India.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined.

Share of Tier 2-3 Metros Total Active Users Among Key India Shopping Apps December 2025, MAU Growth 2025 vs 2023



Top Metros Among Key Shopping Apps
MAU Growth 2025 vs 2023

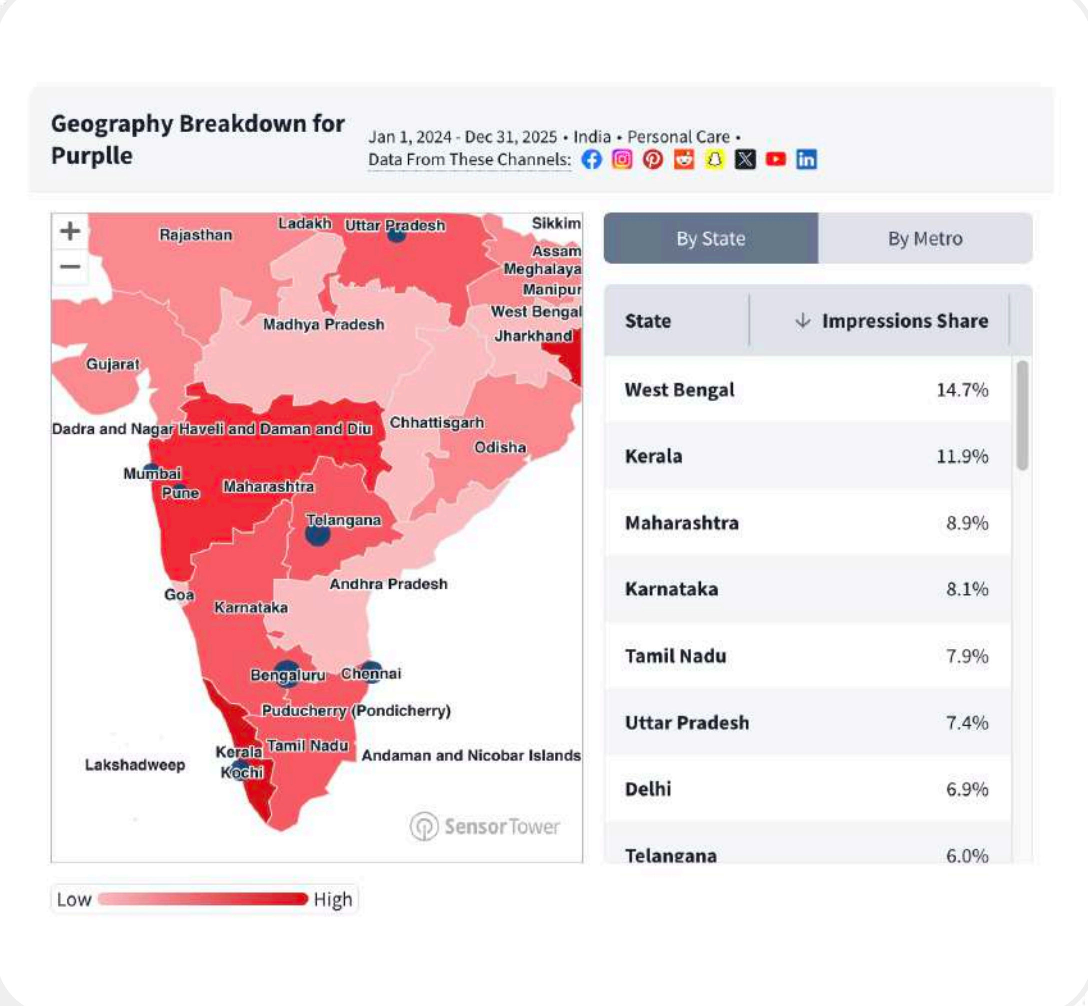
	Meesho	Purplle	Flipkart	JioMart Online	Myntra - Fashion	Nykaa - Beauty	Tira
Tier 1							
1	**Delhi-NCR** +97%	**Delhi-NCR** +122%	**Delhi-NCR** +30%	**Delhi-NCR** +23%	**Delhi-NCR** +51%	**Delhi-NCR** +50%	**Delhi-NCR** +96%
2	**Kolkata** +91%	**Kolkata** +60%	**Kolkata** +17%	**Mumbai** -1%	**Mumbai** +38%	**Mumbai** +99%	**Mumbai** +33%
3	**Mumbai** +93%	**Chennai** +135%	**Mumbai** +33%	**Kolkata** +45%	**Kolkata** +43%	**Kolkata** +89%	**Kolkata** +128%
Tier 2- 3							
1	**Patna** +66%	**Kochi** +185%	**Patna** +23%	**Patna** +69%	**Patna** +60%	**Patna** +180%	**Dehradun** +226%
2	**Lucknow** +47%	**Kozhikode** +111%	**Lucknow** +1%	**Bhubaneswar** +45%	**Lucknow** +77%	**Lucknow** +177%	**Lucknow** +160%
3	**Jaipur** +70%	**Patna** +123%	**Jaipur** +13%	**Jaipur** +41%	**Jaipur** +53%	**Jaipur** +149%	**Patna** +201%

From Metros to Heartland:
Purplle's Tier-2 and Tier-3 Beauty Playbook

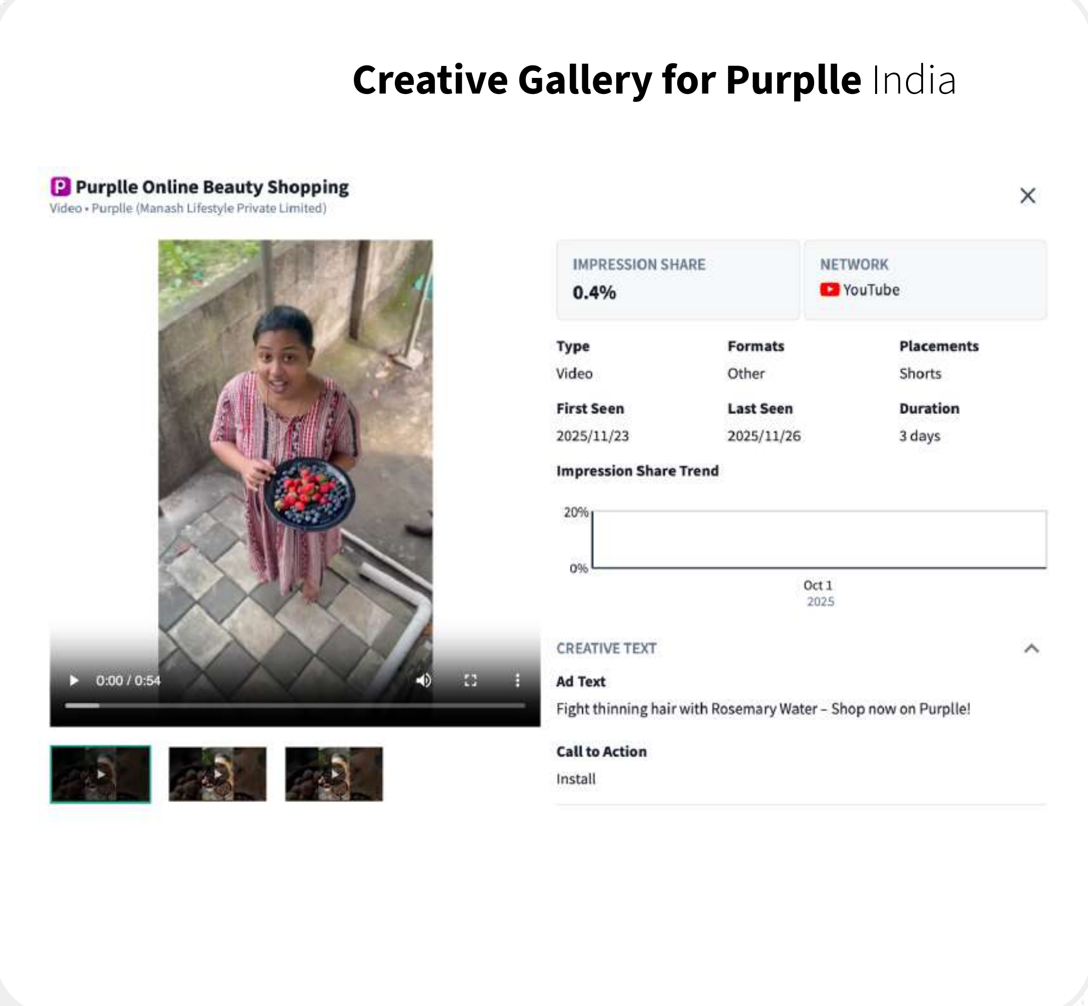
Source: Sensor Tower Mobile App Insights, Pathmatics Digital Advertising Insights as of January 15, 2026.

Purplle is a digital-first beauty platform built around curated discovery, accessible price points, and regional relevance—positioning it well to capture beauty demand beyond India's largest metros. *Purplle's* recent growth highlights a deliberate shift toward Tier-2 and Tier-3 cities, where regional adoption, state-wide advertising, and localized messaging are driving stronger user expansion than in several major metros.

Purplle's MAU growth is being driven by **Kochi and Kozhikode**, where user expansion now outpaces several larger metros. This highlights rising beauty adoption in Tier-2 cities that are often overlooked in national expansion strategies.



This usage growth is supported by a clear increase in advertising activity across the entire state of **Kerala**, rather than a narrow city-led strategy. By broadening spend beyond top metros, *Purplle* has strengthened brand visibility and sustained acquisition across multiple regional markets simultaneously.



Purplle's campaigns in Kerala lean heavily into localized creatives, using regional language, cultural cues, and everyday beauty use cases. This localization has helped improve relevance and engagement, reinforcing Purplle's ability to convert regional awareness into active, repeat users.

India’s Black Friday Moment Is Taking Shape—And Snitch Shows What’s Possible

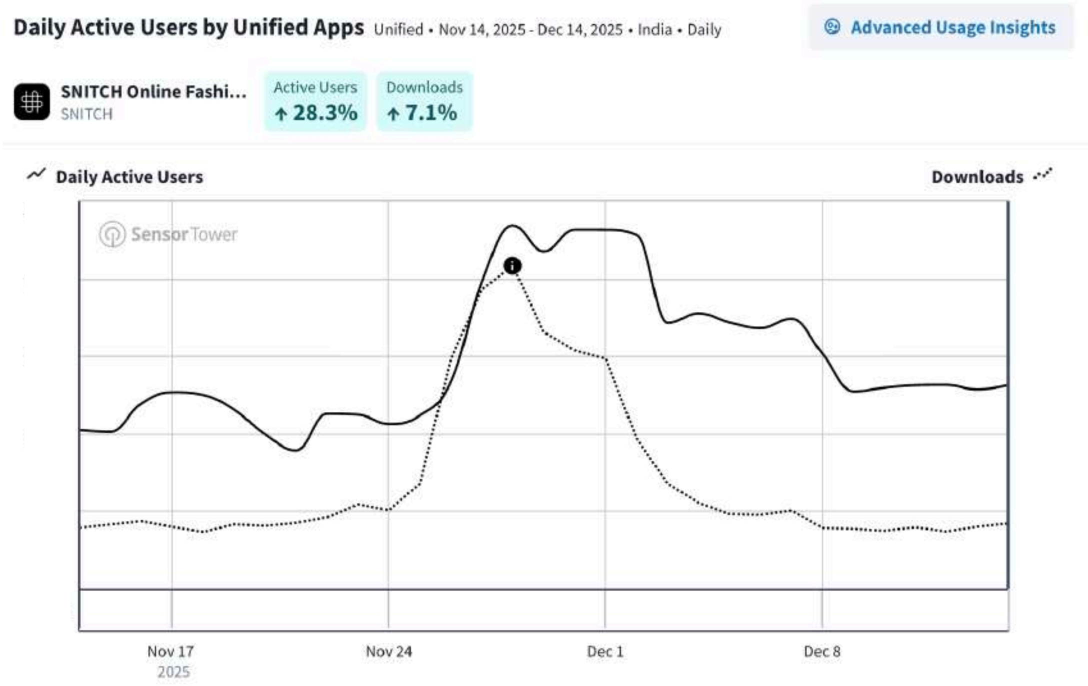
Snitch is a digital-first men’s fashion brand in India, known for trend-led collections, fast drops, and a strong app-centric commerce strategy that blends performance marketing with localized fulfillment.

Snitch’s 2025 Black Friday campaign became a breakout moment, delivering the app’s highest-ever daily active users and a significant MAU spike. The performance signals a shift in India’s retail landscape, where global deal-driven moments are increasingly effective when paired with strong merchandising and app-first execution.

Growth extended beyond the event as weekly active users climbed following the rollout of Snitch’s 60-minute delivery service in Bengaluru. The outsized city-level impact highlights how fast, localized fulfillment can materially lift engagement and convert short-term demand spikes into sustained usage.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined.

SNITCH Black Friday 2025 Event Impact on Active Users and Downloads November 2025



SNITCH 60 Minute Delivery Rollout Impact on Active Users November 2025

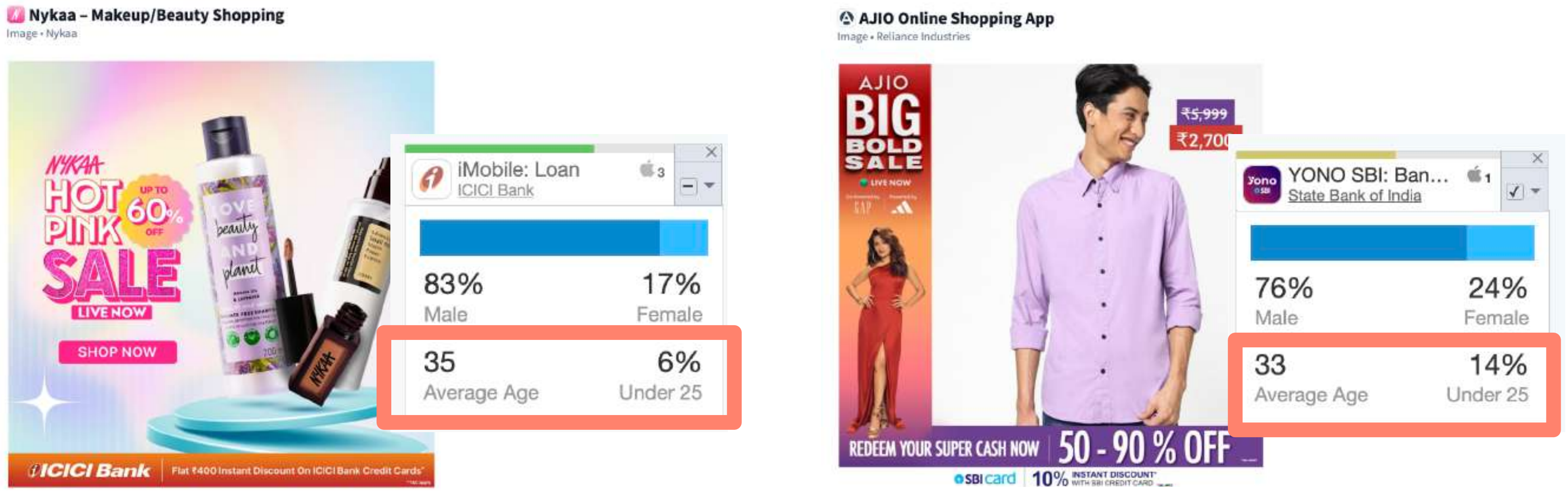
Matching Payments to Shoppers: Why Partner Fit Matters More Than Discounts

Payment partnerships are increasingly central to conversion, but effectiveness depends on audience fit. *Nykaa*'s ICICI Bank tie-ups and *AJIO*'s SBI card offers deliver scale and trust, yet their bank partners skew older and more traditional than the apps' core shoppers—creating a growing mismatch between deal mechanics and user expectations.

Leading shopping apps in India now over-index toward under-25 users, especially in beauty and fashion. In contrast, emerging payment wallets such as *FamApp*, *POP*, and *SuperMoney* attract younger, high-engagement audiences. Aligning with these platforms can better match shopper profiles, improving relevance, frequency, and checkout conversion.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.

Share of Age Group Among Partner Payments Brands In Select India Shopping Apps Q4 2025



Share of Age Group Among Major India Shopping Apps Q4 2025

App	Publisher	Male	Female	Average Age	Under 25
Purplle Online B...	Purplle (Manash Lifes...	28%	72%	28	36%
Meesho: Online ...	Meesho	42%	58%	29	36%
Myntra - Fashio...	Myntra	50%	50%	29	28%
Nykaa - Beauty ...	Nykaa	24%	76%	28	31%
AJIO Online Sho...	Reliance Industries	51%	49%	29	26%

Share of Age Group Among Emerging India Digital Wallet & Payment Apps Q4 2025

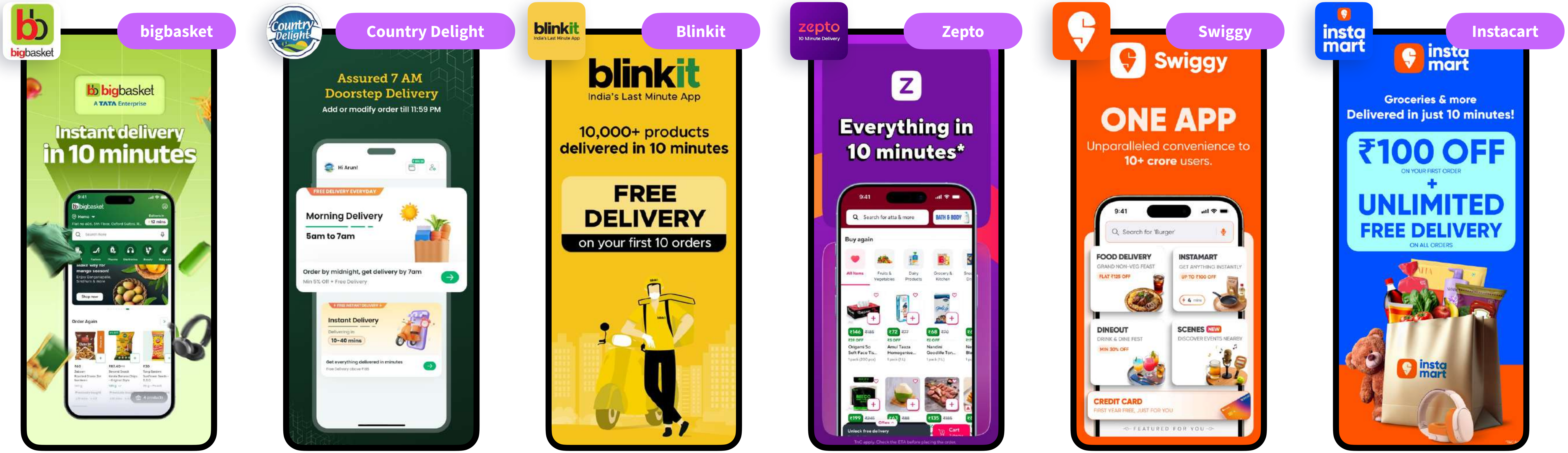
App	Publisher	Male	Female	Average Age	Under 25
super.money	Super.money	85%	15%	28	37%
POP: Pay, Earn	POPtech Growth	87%	13%	26	47%
FamApp by Trio	Tri O Tech Solutions	80%	20%	25	59%
Jupiter: Cards	Amica Financial Tech...	89%	11%	29	24%
PhonePe UPI	PhonePe	76%	24%	29	24%

Food Delivery & Quick Commerce

Speed, Frequency, and Urban Habit Formation

India's Quick Commerce Race: From Early Disruptors to Platform Convergence

Source: Sensor Tower Mobile App Insights



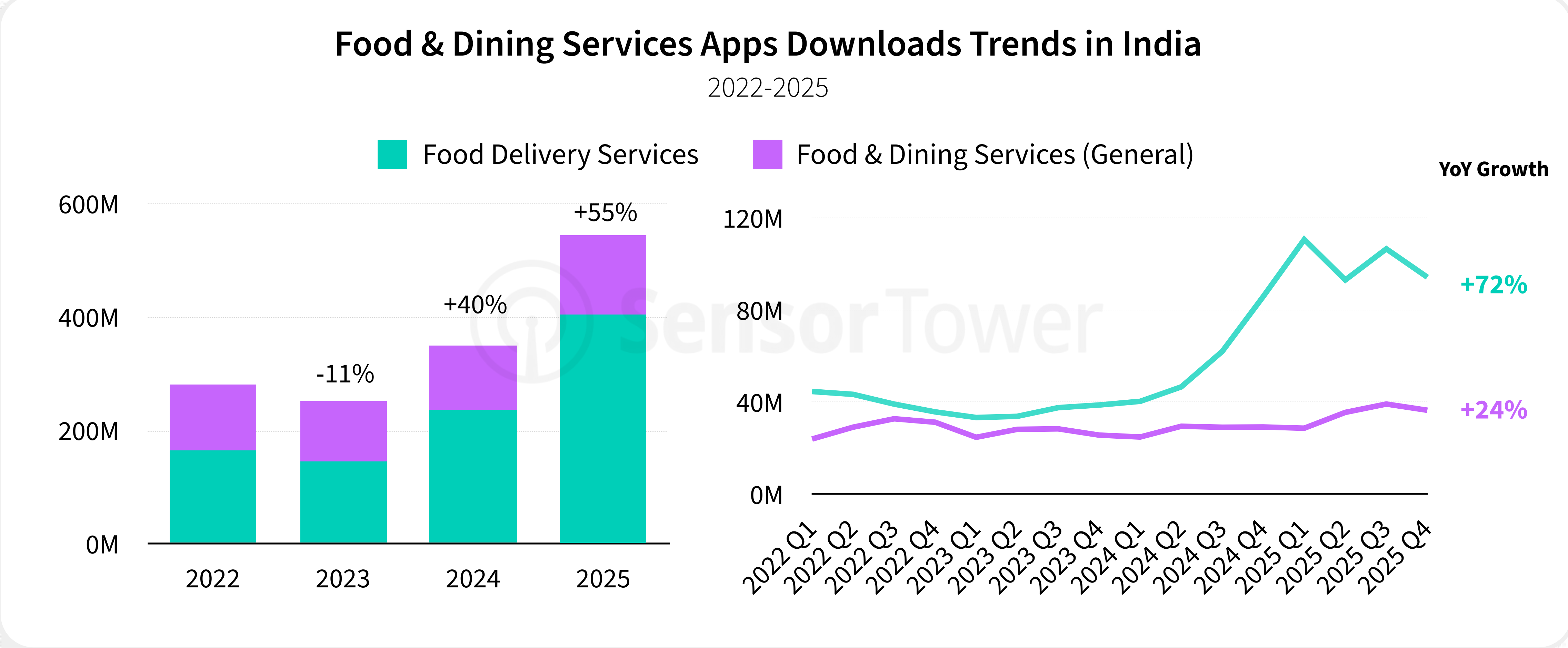
India's quick commerce landscape was shaped first by early digital grocery pioneers such as *BigBasket* and Grofers (rebranded as *Blinkit* in 2021), which built trust and habitual ordering for daily essentials. Though not designed for ultra-fast delivery, these platforms established the reliability and usage patterns that later enabled frequent, on-demand grocery consumption.

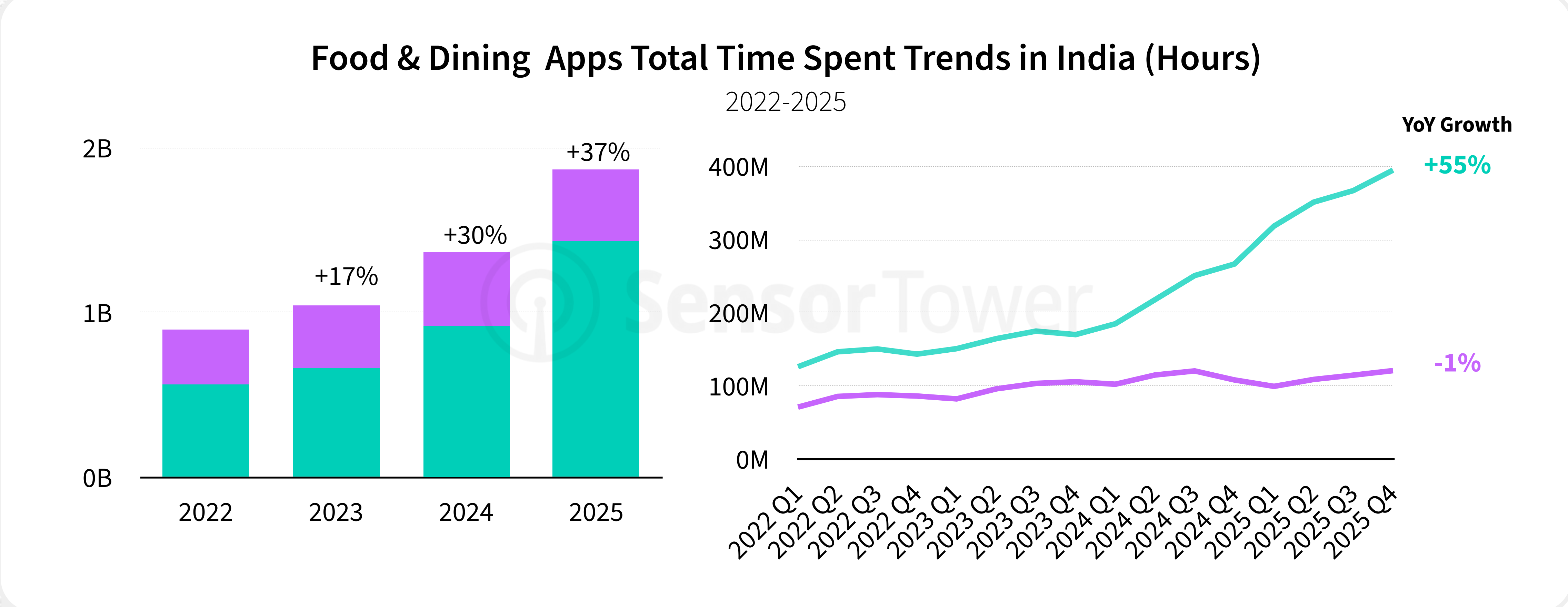
The category's inflection point came with the emergence of *Zepto*, which redefined consumer expectations by scaling a 10-minute delivery-first model. This speed-led disruption rapidly accelerated adoption and forced incumbents to respond. Food delivery platforms soon converged on the space, with *Zomato*'s acquisition of *Blinkit* and *Swiggy's* launch of *Instamart*, both leveraging existing logistics networks and high-frequency users to compete directly in instant delivery. Today, quick commerce has evolved into a tightly contested arena where native players and food delivery incumbents compete head-to-head for the same everyday consumption moments.

Quick Commerce and Food Delivery Becomes India's Mobile-First Growth Engine

Food delivery apps surpassed **530 million** downloads in 2025, evolving from convenience-led services into core, habit-driven platforms. As quick commerce and food delivery platforms increasingly converge and compete, food delivery has strengthened its position as a mobile-first growth engine, anchored in everyday consumption.

Engagement reached nearly **2 billion hours in 2025**, up 55% year over year, reinforcing food delivery apps as high-frequency destinations. Their scale and intent-rich usage have made them essential marketing partners, enabling brands to reach consumers at moments of discovery, purchase, and repeat engagement.





Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Quick Commerce Secures Scale While Restaurant Brands Drive Habitual Use

India's Food Delivery rankings in 2025 highlight an increasingly competitive quick commerce landscape. _Blinkit_ lead the category by downloads, with _Zepto_, _Instamart_, and _BigBasket_ close behind. The sustained momentum of 10-minute delivery reflects how speed and convenience have become core expectations, driving frequent, utility-led usage across urban consumers.

In contrast, fast food and casual dining remain firmly brand-led. Platforms such as _Zomato_ provide scale, but restaurant brands including _Domino's_, _KFC_, _McDonald's_, and _Burger King_ continue to dominate engagement through their own apps. These brands benefit from strong recall, loyalty programs, and repeat purchase behavior, reinforcing habitual use beyond logistics-driven competition.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Food & Dining Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Food Delivery

Rank	App	vs Previous	
1	Blinkit: Groceries & more	▲	2
2	Zepto: Groceries in minutes	▼	1
3	Instamart: Groceries & more	NEW	
4	bigbasket: 10 min Grocery App	=	
5	Swiggy: Food Instamart Dineout	▼	3
6	Mera Ration 2.0	▼	1
7	Swiggy Delivery Partner App	=	
8	magicpin:Food|Fashion|Delivery	▲	2
9	DealShare: Online Grocery App	▲	3
10	Country Delight: Milk Delivery	▼	4

Food & Dining Services (General)

Rank	App	vs Previous	
1	Zomato	=	
2	Domino's Pizza - Food Delivery	=	
3	KFC	=	
4	BURGER KING App	▲	2
5	Pizza Hut	▼	1
6	McDonald's	▼	1
7	McDelivery	=	
8	Licious: Chicken, Meat & More	▲	1
9	La Pino'z - Order Pizza Online	▼	1
10	EazyDiner: Eatout & Save	▲	1

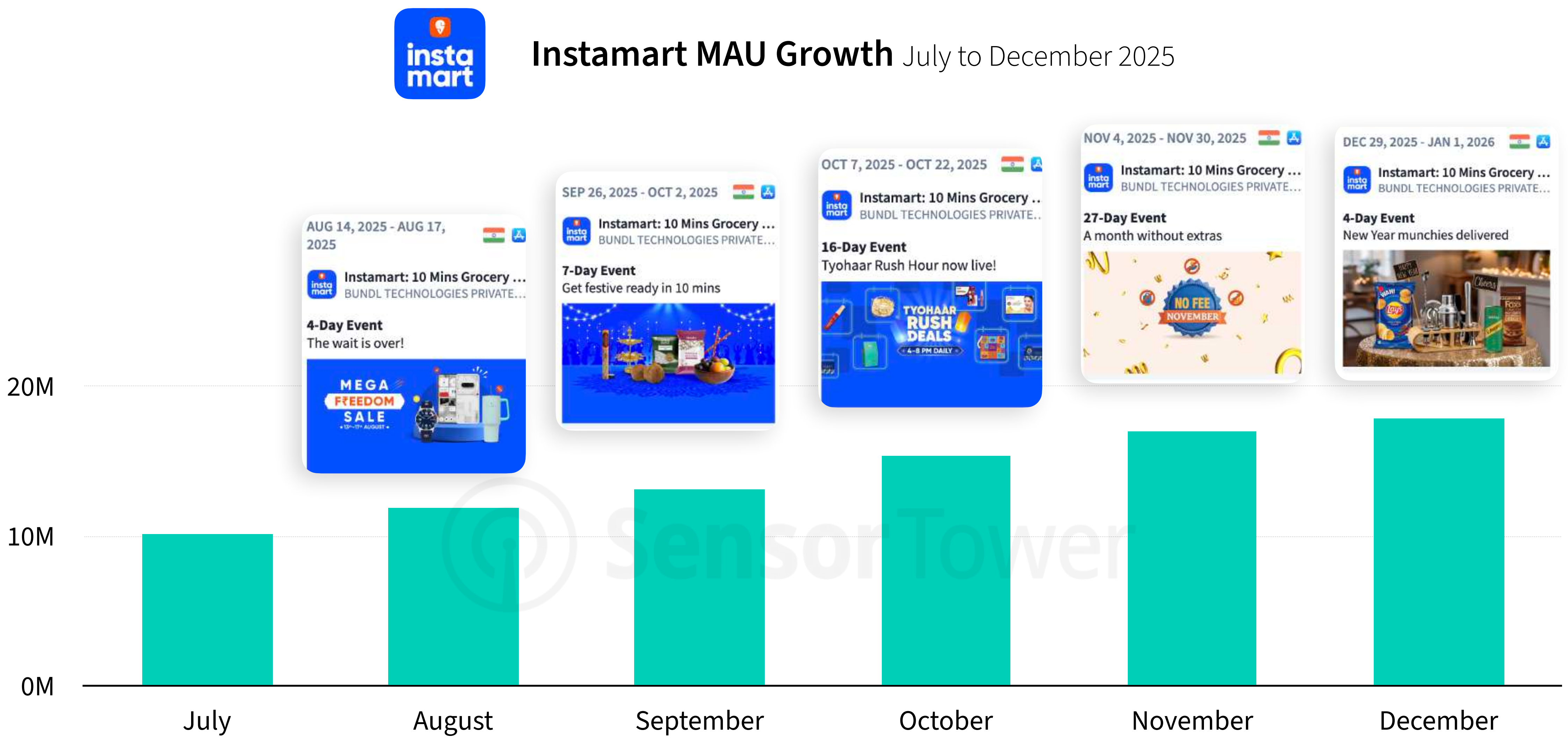
Instamart Accelerates Retention Through Event-Led Engagement

Instamart sustained steady MAU growth in the second half of 2025 by running a dense calendar of activation moments, spanning promotional sales, festive campaigns, and the "No Fee November" free-delivery push. Rather than relying on one-off spikes, these frequent events kept users returning month after month, lifting active usage from July through December.

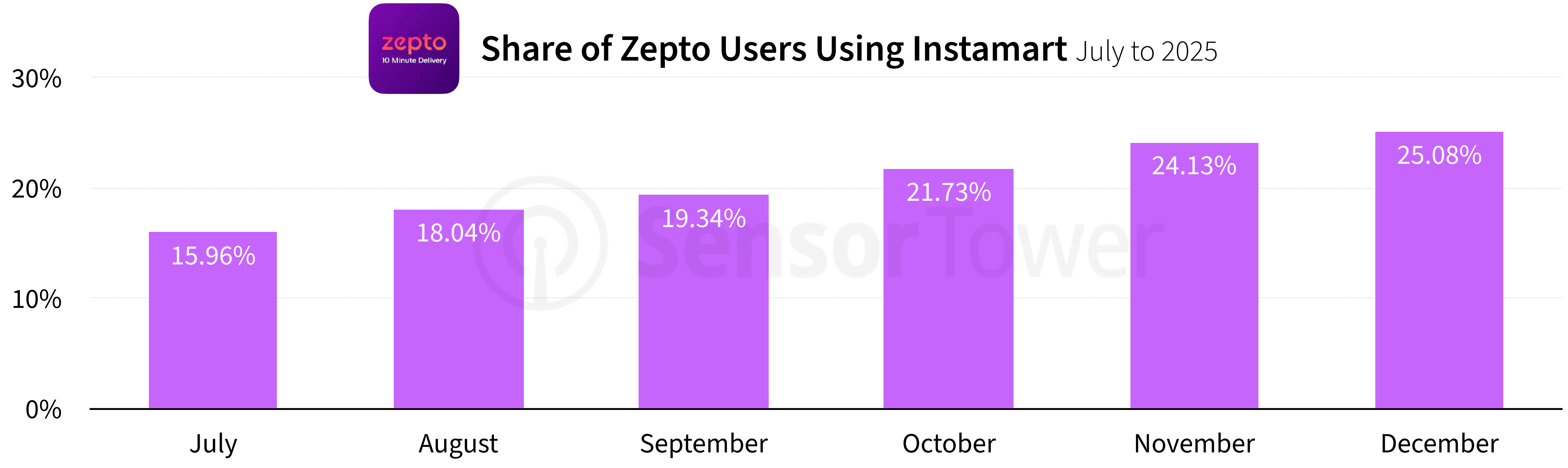
This engagement strategy also translated into competitive share gains. As *Instamart* increased usage frequency, overlap with *Zepto's* user base rose meaningfully—from around 15% in July to roughly 25% by December. The rising cross-usage highlights how retention-led tactics are enabling Instamart to pull demand from rival quick-commerce platforms, reinforcing the shift from pure acquisition toward share capture and habitual use.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined.

Instamart MAU Growth July to December 2025



Share of Zepto Users Using Instamart July to 2025

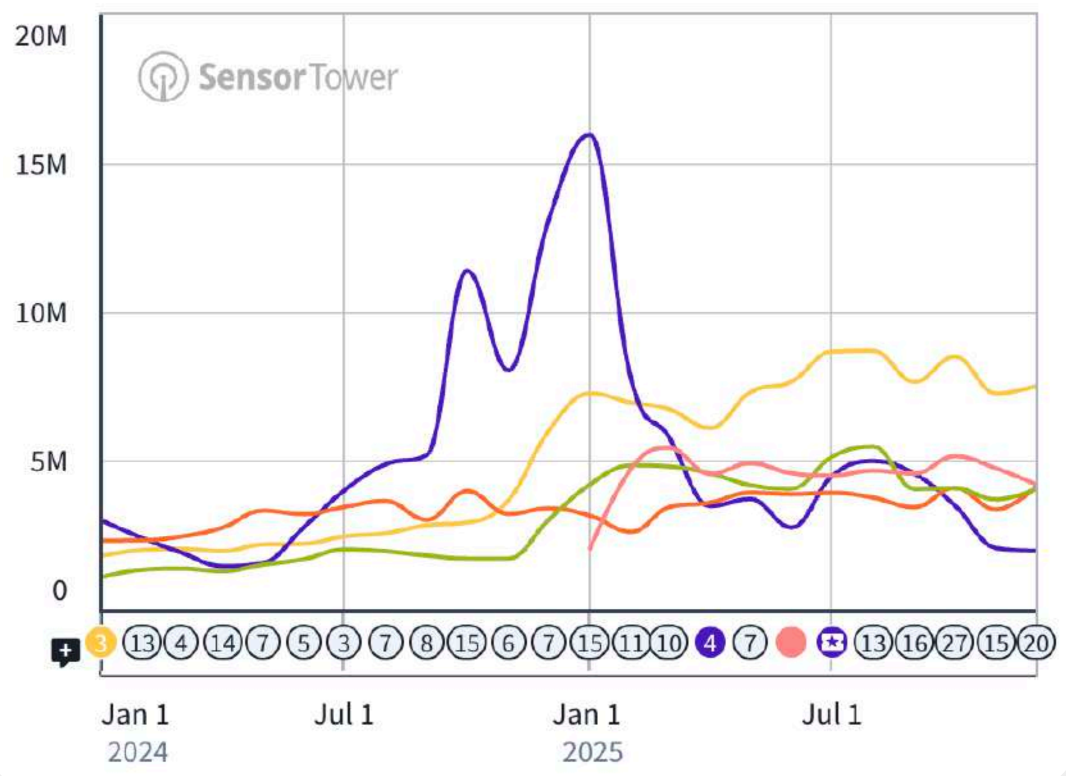


Zepto Shifts From Scale to Stickiness—And Wins the Retention Game

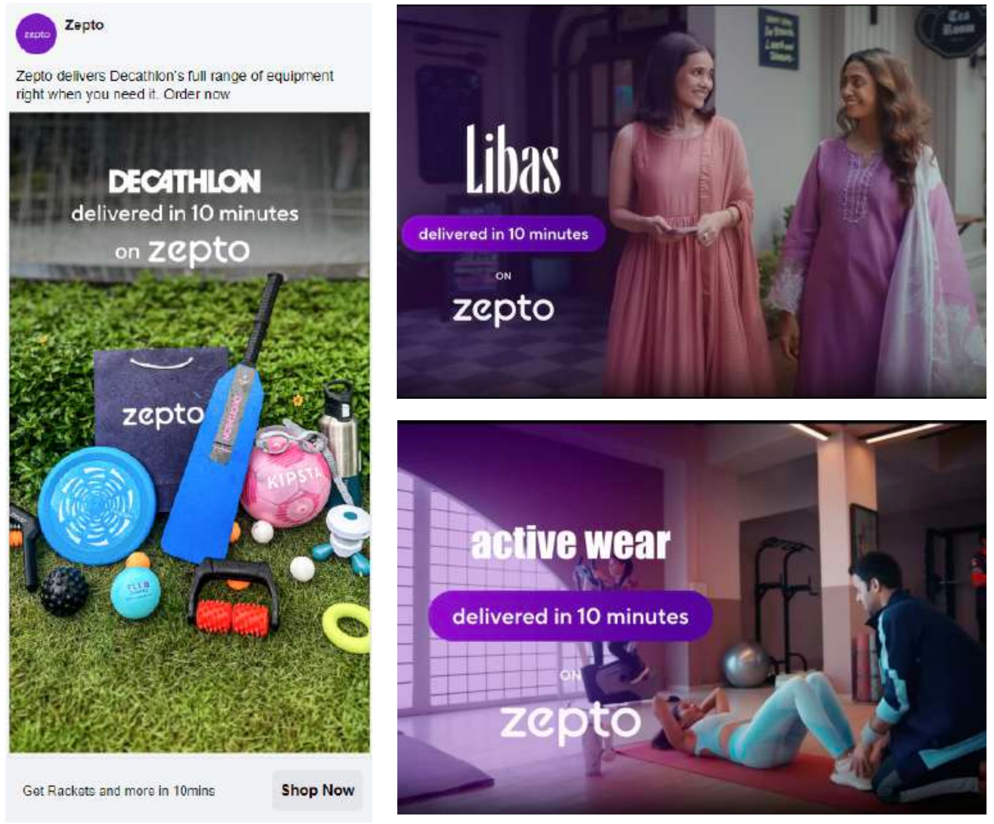
Source: Sensor Tower App Performance Insights as of January 15, 2026.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores

Zepto, one of India's fastest-growing quick commerce players, built its early lead through aggressive acquisition and ultra-fast delivery. In 2025, the company pivoted from scale to stickiness—prioritizing retention, reliability, and everyday value over raw download growth.

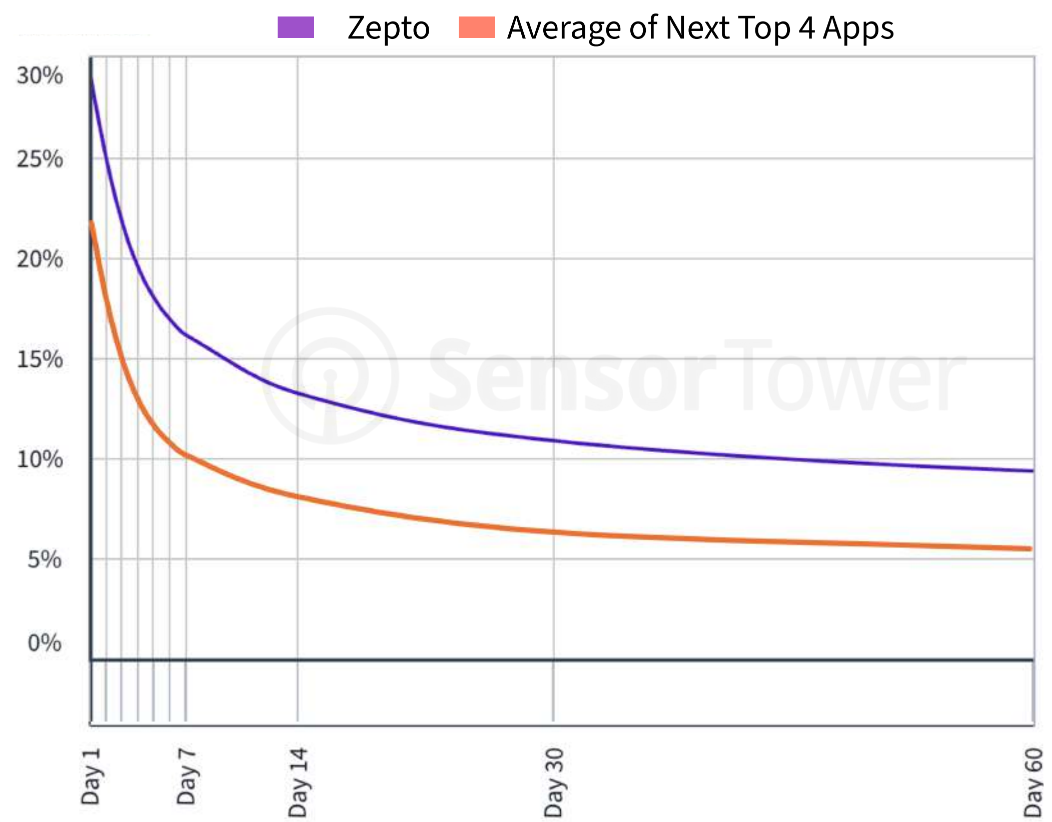
Download Trends Top 5 Quick Commerce Apps
India, 2024 - 2025



Creative Gallery for Zepto



Zepto D1 to D60 Retention
vs. Top 5 Quick Commerce Apps December 2025



Following a year as one of the largest advertisers in quick commerce, Zepto intentionally pulled back on aggressive acquisition in 2025. As a result, its download momentum softened relative to peers like *Blinkit*, *Instamart*, *Swiggy*, and *BigBasket*—but this was a strategic tradeoff, not a loss of relevance.

To drive stickiness, Zepto expanded beyond groceries into high-frequency lifestyle categories. Partnerships with brands like Decathlon and Libas extend 10-minute delivery into sporting goods and fashion across 50+ cities—reframing quick commerce as a channel for immediacy, discovery, and everyday lifestyle needs, not just essentials.

The payoff is clear in engagement. Despite fewer new installs, *Zepto* clearly outperforms the category on D1–D60 retention, maintaining a significantly higher share of returning users than the average of its closest competitors. This gap highlights how value-led improvements—speed, consistency, and everyday utility—are driving deeper engagement

Financial Services
Mobile-First Growth Across Investing, Credit, and Banking

India's Financial Apps Have Gone Mobile-First—Banks Are No Longer the Default Gateway

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Finance Apps By Downloads in India Unified • 2016 - 2025

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Paytm: Secure UPI Payments	Paytm: Secure UPI Payments	Google Pay	Google Pay	Google Pay	PhonePe UPI, Payment, Recharge	PhonePe UPI, Payment, Recharge	PhonePe UPI, Payment, Recharge	PhonePe UPI, Payment, Recharge	PhonePe UPI, Payment, Recharge
2	True Balance- Personal Loan,UPI	Google Pay	Paytm: Secure UPI Payments	PhonePe UPI, Payment, Recharge	PhonePe UPI, Payment, Recharge	Google Pay	Paytm: Secure UPI Payments	Paytm: Secure UPI Payments	Google Pay	Navi: UPI, Insurance & Loans
3	Freecharge UPI & Bill Payments	PhonePe UPI, Payment, Recharge	PhonePe UPI, Payment, Recharge	Paytm: Secure UPI Payments	Paytm: Secure UPI Payments	Paytm: Secure UPI Payments	Google Pay	Google Pay	Paytm: Secure UPI Payments	Paytm: Secure UPI Payments
4	MobiKwik: BHIM UPI & Wallet	BHIM Bharat's Own Payments App	BHIM Bharat's Own Payments App	Loan Online Personal Loan App - CashBean	YONO SBI: Banking & Lifestyle	YONO SBI: Banking & Lifestyle	Bajaj Finserv: Loans, UPI & FD	Bajaj Finserv: Loans, UPI & FD	Bajaj Finserv: Loans, UPI & FD	Google Pay
5	Yono Lite SBI - Mobile Banking	True Balance- Personal Loan,UPI	YONO SBI: Banking & Lifestyle	YONO SBI: Banking & Lifestyle	Dhani: UPI, Cards & Bills	Dhani: UPI, Cards & Bills	YONO SBI: Banking & Lifestyle	Navi: UPI, Insurance & Loans	Groww	Bajaj Finserv: Loans, UPI & FD
6	PhonePe UPI, Payment, Recharge	Yono Lite SBI - Mobile Banking	Dhani: UPI, Cards & Bills	KreditBee: Personal Loan App	Google Pay for Business	Upstox Old - Stocks, MF & IPOs	bob World:Banking & Experience	YONO SBI: Banking & Lifestyle	BHIM Bharat's Own Payments App	Kotak Bank: 811 Mobile App
7	axio: Expense Tracker & Budget	MobiKwik: BHIM UPI & Wallet	Yono Lite SBI - Mobile Banking	BHIM Bharat's Own Payments App	BHIM Bharat's Own Payments App	Groww	KreditBee: Personal Loan App	Groww	YONO SBI: Banking & Lifestyle	super.money - UPI by Flipkart
8	Money View मनी मैनेजर	Kotak Bank (Old)	Bajaj Finserv Wallet	Bajaj Finserv Wallet	Loan Online Personal Loan App - CashBean	CoinSwitch: Buy Bitcoin Crypto	Groww	Angel One: Stocks, Mutual Fund	Angel One: Stocks, Mutual Fund	Groww
9	iMobile: Loan, Cards & Banking	Freecharge UPI & Bill Payments	Paytm for Business	Dhani: UPI, Cards & Bills	Yono Lite SBI - Mobile Banking	Bajaj Finserv: Loans, UPI & FD	Navi: UPI, Insurance & Loans	KreditBee: Personal Loan App	Navi: UPI, Insurance & Loans	YONO SBI: Banking & Lifestyle
10	HDFC Bank MobileBanking App	HDFC Bank MobileBanking App	HDFC Bank MobileBanking App	Yono Lite SBI - Mobile Banking	Bajaj Finserv Wallet	CRED: UPI, Credit Cards, Bills	Kotak Bank (Old)	Moneyview: UPI, Personal Loans	KreditBee: Personal Loan App	IPPB Mobile Banking

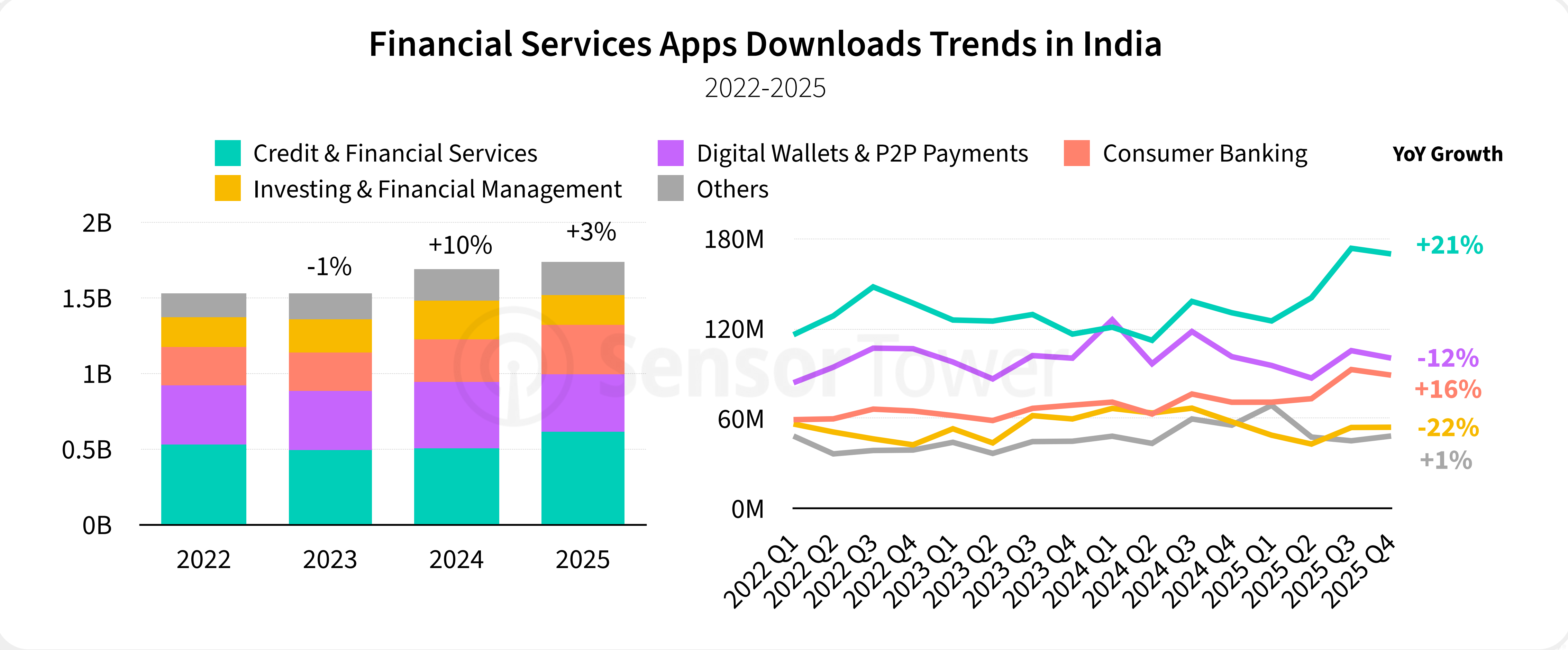
India's digital finance ecosystem has shifted away from bank-led platforms toward mobile-first fintechs. As cashless payments became mainstream, UPI adoption concentrated around non-bank apps—led by *PhonePe*, followed by *Paytm* and *Google Pay*—pushing banks out of the primary engagement layer.
This shift is clearest across sub-segments. *Groww* leads investments with no major bank in among the top category ranks, while *Bajaj Finserv* dominates digital lending. Despite UI overhauls, banks are still used mainly for core utilities, underscoring a structural handover of discovery, frequency, and engagement to mobile-native platforms.

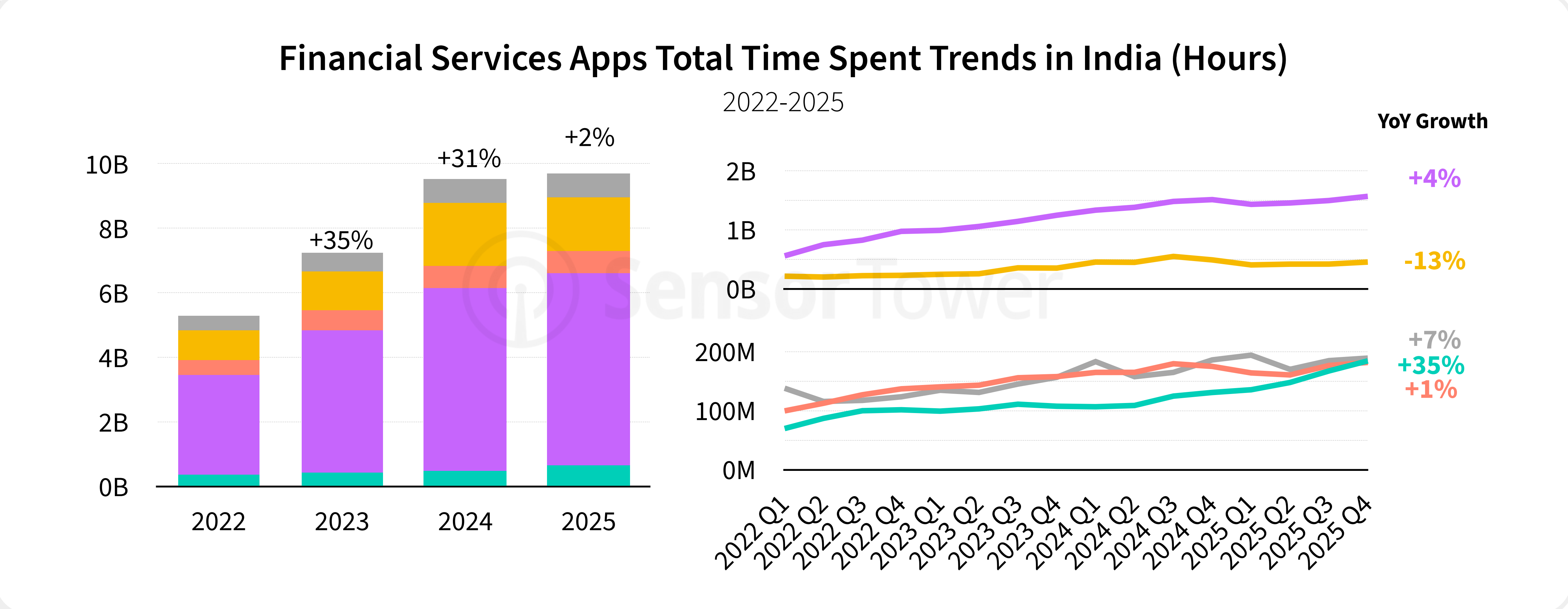
India's Finances Apps Shift From Wallet-Led Scale to Deeper Financial Engagement

Financial services app downloads in India continued to grow in 2025, but at a moderating pace versus earlier years. Growth has increasingly shifted away from Digital Wallets & P2P Payments, which saw softer momentum, toward Credit & Financial Services and Consumer Banking, reflecting rising demand for lending, credit access, and full-service mobile banking.

Engagement growth has outpaced acquisition. Total time spent across financial apps increased sharply, led by Digital Wallets and Investing & Financial Management, as users expand from transactional payments into savings, investments, and credit management. This divergence signals a structural transition from single-purpose wallets to higher-frequency, multi-product financial behavior anchored in mobile-first platforms.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.





UPI Wallets Anchor Scale as Incentive-Led Apps Drive Incremental Growth

India's UPI app landscape in 2025 remains anchored by incumbents such as PhonePe, Paytm, and Google Pay, which continue to dominate downloads and defend scale through ubiquity and trust. Rank movement among leading wallets remains limited, reflecting a mature payments market where penetration is high and switching costs are low.

Downloads growth, however, is being driven by newer, incentive-led and specialized players. Apps such as super.money, FamApp, and BharatPe are gaining traction by layering rewards, credit, and value-added services on top of UPI payments, while long-tail entrants show sharp rank gains off smaller bases.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Digital Wallets & P2P Payment Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Downloads

	App	vs Previous
1	PhonePe UPI, Payment, Recharge	=
2	Paytm: Secure UPI Payments	▲ 1
3	Google Pay	▼ 1
4	super.money - UPI by Flipkart	▲ 5
5	BHIM Bharat's Own Payments App	▼ 1
6	FamApp by Trio: UPI & Card	▲ 1
7	MobiKwik: BHIM UPI & Wallet	▼ 2
8	CRED: UPI, Credit Cards, Bills	=
9	PayZapp UPI Wallet, Pixel Card	▼ 3
10	BharatPe UPI Payment, Loan App	▲ 14

Downloads Growth

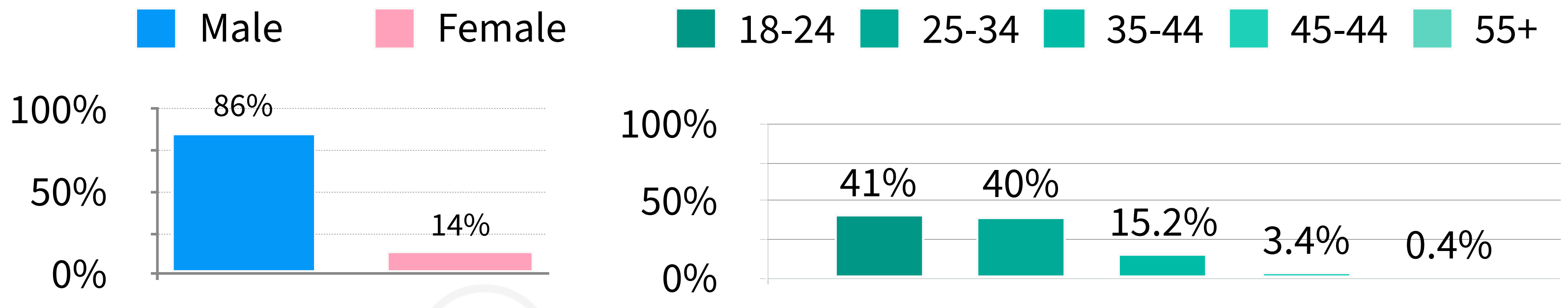
	App	
1	super.money - UPI by Flipkart	▲ 5
2	FamApp by Trio: UPI & Card	▲ 1
3	BharatPe UPI Payment, Loan App	▲ 14
4	bob ₹ Pay	▲ 4
5	eRupee by SBI	▲ 18
6	Kredit.Pe: Get Cashback on UPI	▲ 81
7	SDPay - Discover, Buy, Earn	▲ 63
8	Recharge Raahi	NEW
9	Google Wallet	▲ 2
10	AnnapurnaPay	▲ 255

Super.money: Rewards-Led Payments Win India's Young, Mobile-First Users

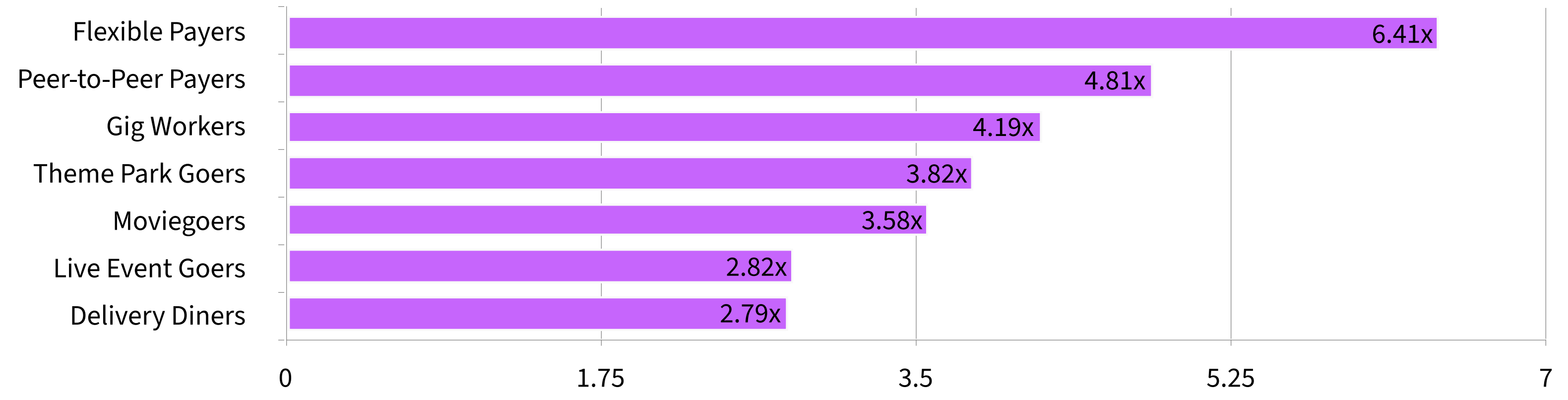
Source: Sensor Tower App Performance Insights as of January 15, 2026.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

Super.money has emerged as a fast-growing UPI-first payments app in India by prioritizing everyday transactions, instant rewards, and gamified value. Rather than competing with banks on full-stack financial services, super.money focuses on high-frequency payment use cases that drive habit, engagement, and repeat usage among younger consumers.

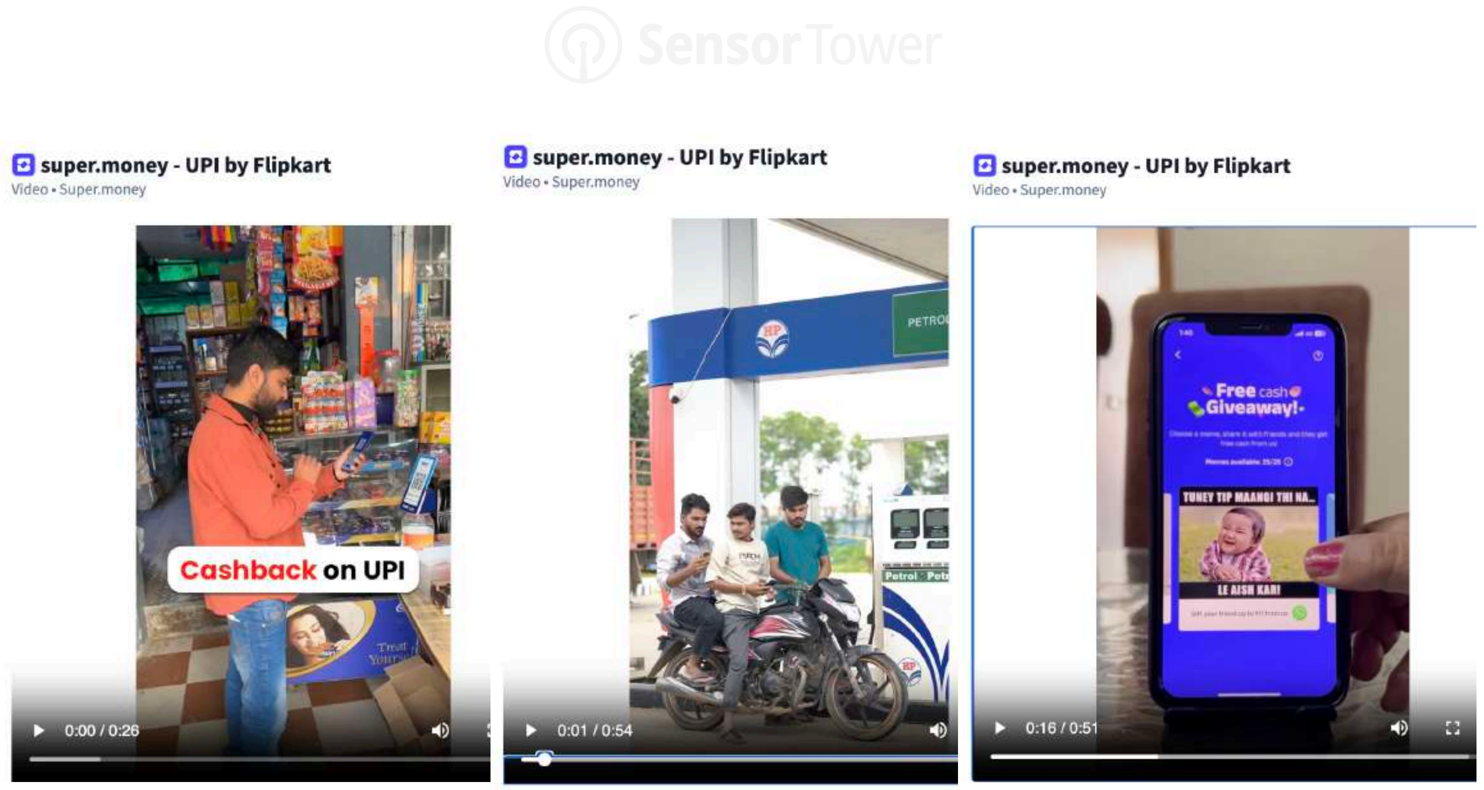
super.money Audience Overview and Personas 2025 India



super.money Audience vs. General Population % Difference



Creative Gallery for super.money India



super.money's audience skews heavily male and under 35, with over 80% of users below 35 and strong concentration in the 18–34 age group. This profile reflects appeal among mobile-first users such as gig workers, peer-to-peer payers, and flexible earners who prioritize speed, incentives, and daily utility over traditional banking relationships.

super.money's creatives closely mirror its core personas, emphasizing UPI cashback, real-world spending moments, and simple rewards mechanics. Campaigns highlight daily scenarios—fuel, groceries, small merchants—reinforcing the app's role as a practical, rewards-driven payment layer rather than a long-term financial planning tool.

Fintech Platforms Lead India's Investment Apps as Alternative Assets Gain Momentum

India's investment app market remains led by digital-first platforms such as Groww and Angel One, which continue to dominate downloads by offering simple access to equities, mutual funds, and IPOs. Their stability reflects a mature retail investor base prioritizing ease of use and broad coverage.

Downloads growth is increasingly driven by fintech apps focused on diversification and capital preservation. Platforms centered on digital gold, fixed deposits, bonds, and options—such as Jar, Stable Money, WintWealth, and Sahi—are gaining traction, signaling a gradual expansion toward more outcome-oriented investing.

Data Source: Sensor Tower App Performance Insights as of January 15, 2026.
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. Revenue is gross — inclusive of any percent taken by the app stores.

Top Investment Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Downloads

Rank	App	vs Previous
1	Groww	=
2	Angel One: Stocks, Mutual Fund	=
3	Jar:Save Money in Digital Gold	▲ 2
4	Upstox Stocks IPO Mutual Funds	▼ 1
5	Olymptrade Trading online	▲ 1
6	Dhan: Share Market Trading App	▲ 7
7	Share.Market: Stocks, F&O, IPO	▼ 3
8	Kotak Neo: Stocks, Mutual Fund	▲ 4
9	INDmoney: Stocks, Mutual Funds	▼ 2
10	Stable Money: FDs, Bonds, Gold	▲ 13

Downloads Growth

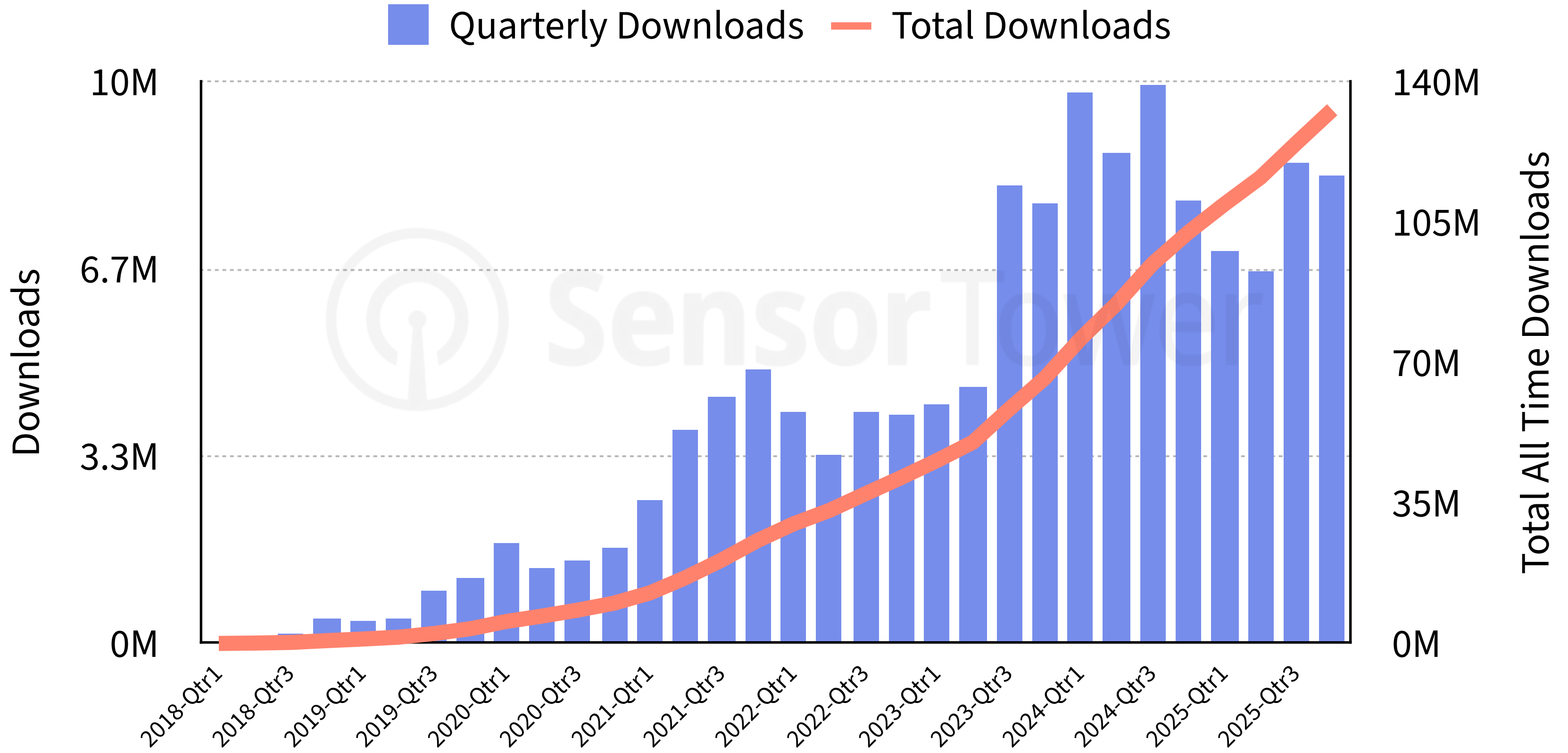
Rank	App	vs Previous
1	Jar:Save Money in Digital Gold	▲ 2
2	SBI Securities: Stocks & SIP	▲ 21
3	Stable Money: FDs, Bonds, Gold	▲ 13
4	WintWealth: 9-12% Fixed Return	▲ 175
5	Bachatt: Daily FD Mutual Funds	NEW
6	Dhan: Share Market Trading App	▲ 7
7	Sahi : Options & Stock Trading	▲ 382
8	Univest: Stocks, F&O, Equity	▲ 10
9	XM 360 - Trading App	▲ 57
10	Aura - India's Gold Saving App	▲ 93

Groww: India’s Fastest-Growing Investment App to Cross 100 Million Global Downloads

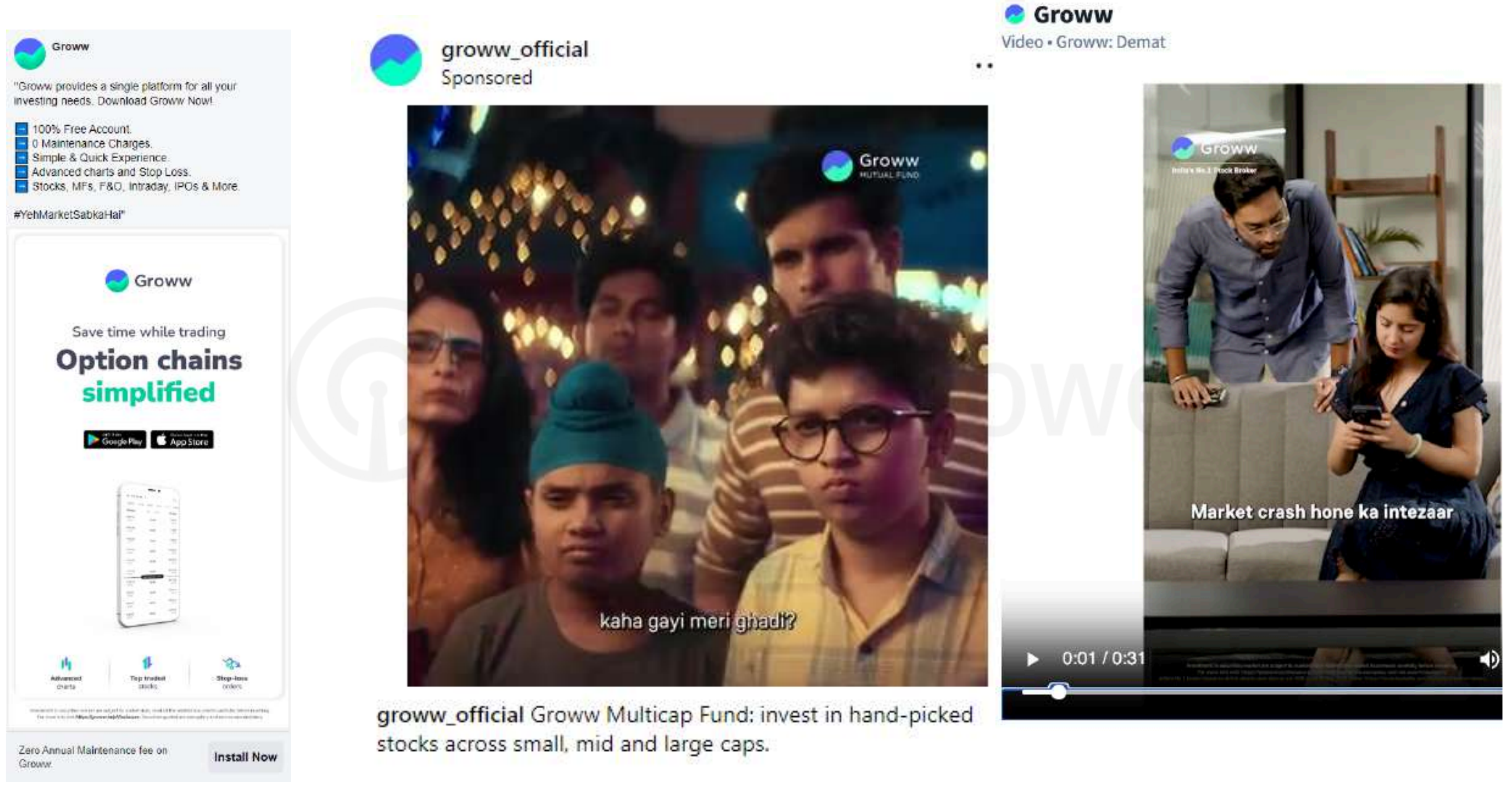
Source: Sensor Tower App Performance Insights as of January 15, 2026.
Notes: Sensor Tower’s data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

Launched in 2017, **Groww** has become one of India’s leading investment platforms, making stock, mutual fund, and ETF investing simple for millions. In 2025, it became the **first and fastest Indian investment app to exceed 100 million downloads worldwide**, marking a major milestone in the country’s digital finance growth.

Groww Quarterly Downloads and Total Cumulative Downloads



Creative Gallery for Groww



Groww’s success stems from its **intuitive design and transparent approach**, lowering entry barriers for new investors. Its user-friendly tools and low fees have made it especially popular among younger, mobile-first users seeking accessible and trustworthy investing options.

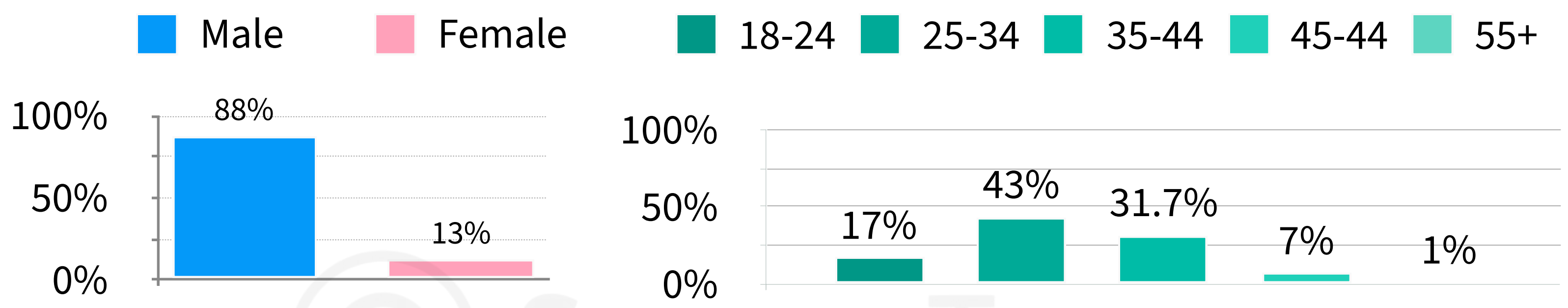
Its **marketing strategy** focuses on relatable storytelling across YouTube, Facebook and Instagram. Ads highlight real-life financial goals and milestones through everyday scenes and influencer collaborations—building trust, brand familiarity, and engagement across India’s growing retail investor base.

Angel One:
India’s High-Growth Investing Platform

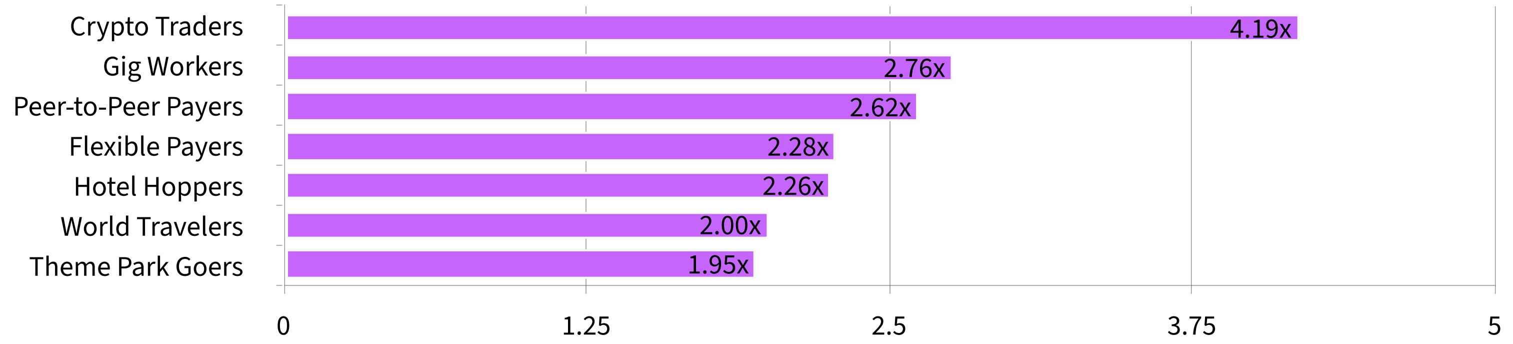
Source: Sensor Tower Audience Insights

As one of India’s fastest-rising investment apps, **Angel One** has become a leading gateway for millions of new retail investors entering equities, mutual funds, and digital gold. With a strong mobile-first experience and widespread brand recognition, Angel One continues to play a central role in shaping India’s rapidly expanding retail investing ecosystem.

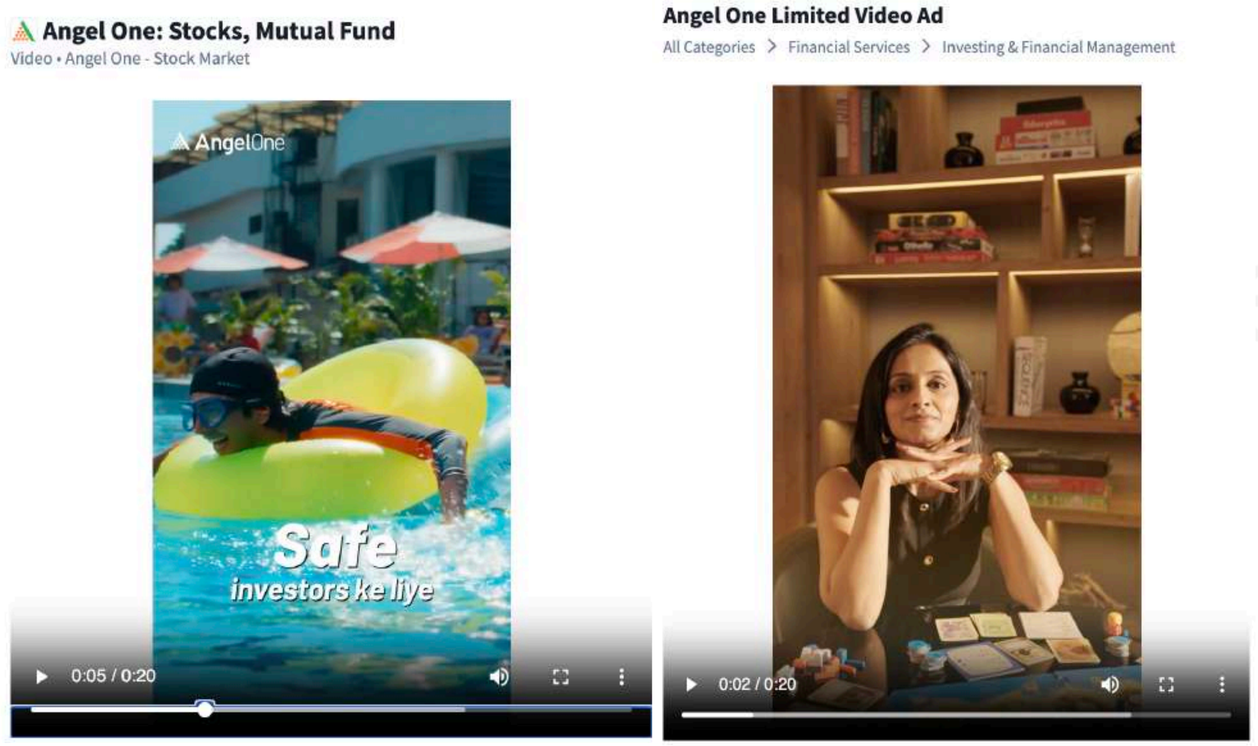
Angel One Audience Overview and Personas 2025 YTD India



Angel One Audience vs. General Population % Difference



Creative Gallery for Angel One India



Audience insights show that Angel One’s user base is overwhelmingly **male (88%)** and heavily concentrated among investors aged **25–34**, who make up the largest share of its audience. This demographic profile reflects the surge of young, digitally savvy Indians entering the markets for the first time—seeking accessible tools for stock trading, wealth building, and long-term financial planning.

Angel One’s creative strategy focuses on accessibility and confidence-building, using relatable everyday scenarios to simplify investing. Campaigns emphasize easy onboarding, safe investing, and goal-based planning, positioning the app as a trustworthy choice for first-time investors. With friendly visuals, clear CTAs, and inclusive messaging like “#AppForSmartInvesting,” Angel One strengthens its role as a leading platform for India’s fast-growing retail investor community.

India's Lending Apps Evolve as Multi-Product Platforms Coexist With New Credit Use Cases

At the top of India's lending rankings, scale remains concentrated among platforms that span multiple financial needs. Navi and Bajaj Finserv continue to lead downloads by bundling UPI, loans, insurance, and deposits, benefiting from strong brand recognition and wide distribution. Rank movement at the top remains limited, signaling a market where trust and reach are critical.

Below the leaders, growth dynamics look more experimental. Apps focused on credit building, instant personal loans, and UPI-linked credit—including GoodScore, Kissht, slice, and Home Credit—are climbing rapidly. This momentum reflects a shift toward more deliberate, outcome-oriented borrowing, as users adopt digital credit tools to manage liquidity, build credit profiles, and smooth everyday expenses.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Credit & Financing Services Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Downloads

Rank	App	vs Previous
1	Navi: UPI, Insurance & Loans	▲ 1
2	Bajaj Finserv: Loans, UPI & FD	▼ 1
3	KreditBee: Personal Loan App	=
4	GoodScore: Build Credit Score	▲ 9
5	Moneyview: UPI, Personal Loans	▼ 1
6	mPokket: Instant Loan App	=
7	Branch: Personal Loan App	▲ 2
8	Kissht: Instant Personal Loans	▲ 6
9	slice: UPI credit card & bank	▲ 11
10	0% EMI Shopping App	▲ 1

Downloads Growth

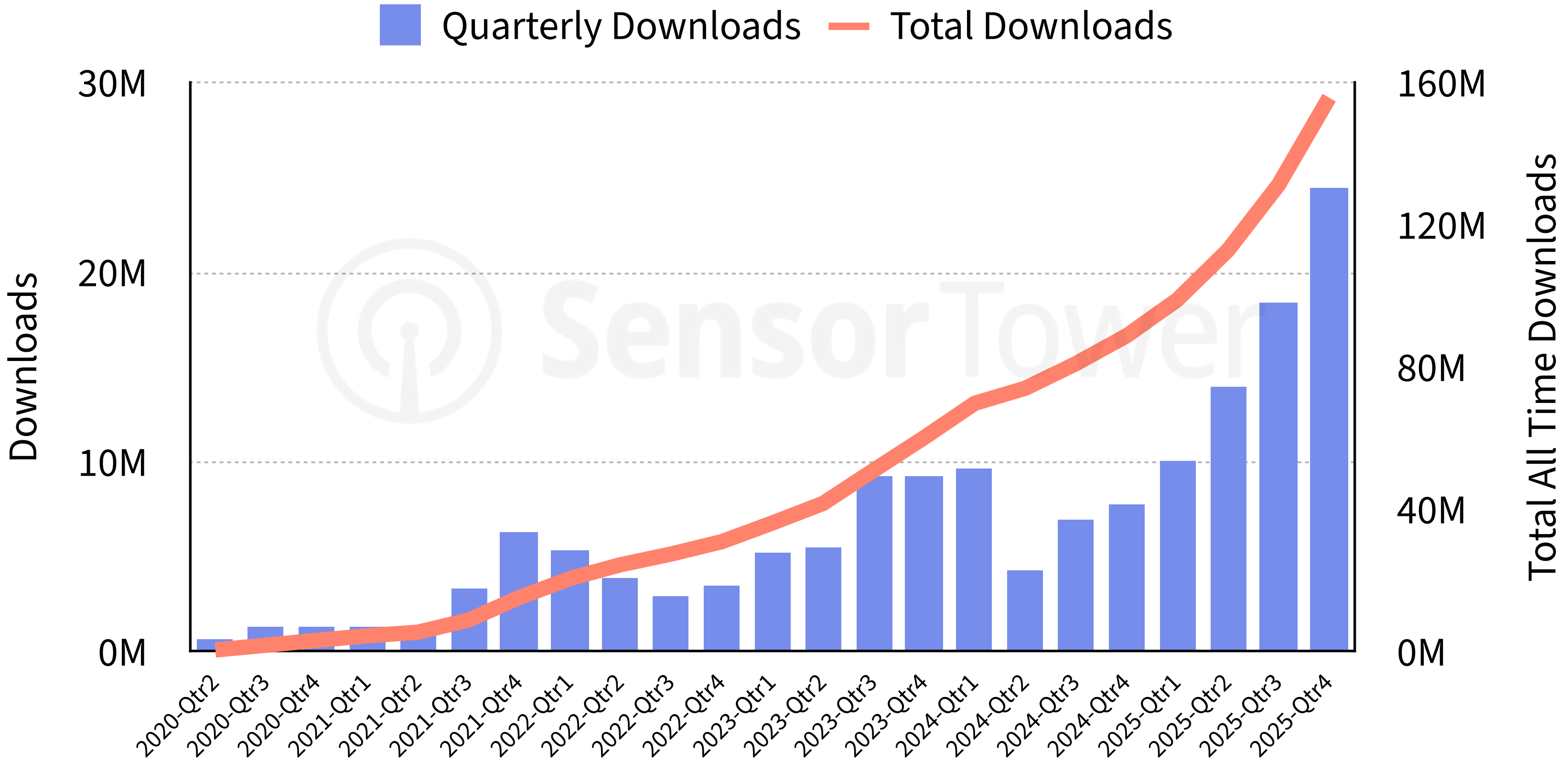
Rank	App	
1	Navi: UPI, Insurance & Loans	▲ 1
2	GoodScore: Build Credit Score	▲ 9
3	Bajaj Finserv: Loans, UPI & FD	▼ 1
4	Kissht: Instant Personal Loans	▲ 6
5	slice: UPI credit card & bank	▲ 11
6	Home Credit: Personal Loan App	▲ 25
7	FatakPay: Financial Wellness	▲ 23
8	Moneyview: UPI, Personal Loans	▼ 1
9	Branch: Personal Loan App	▲ 2
10	Ram Fincorp: Personal Loan App	NEW

Navi: From Credit Utility to Everyday Finance App

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined.

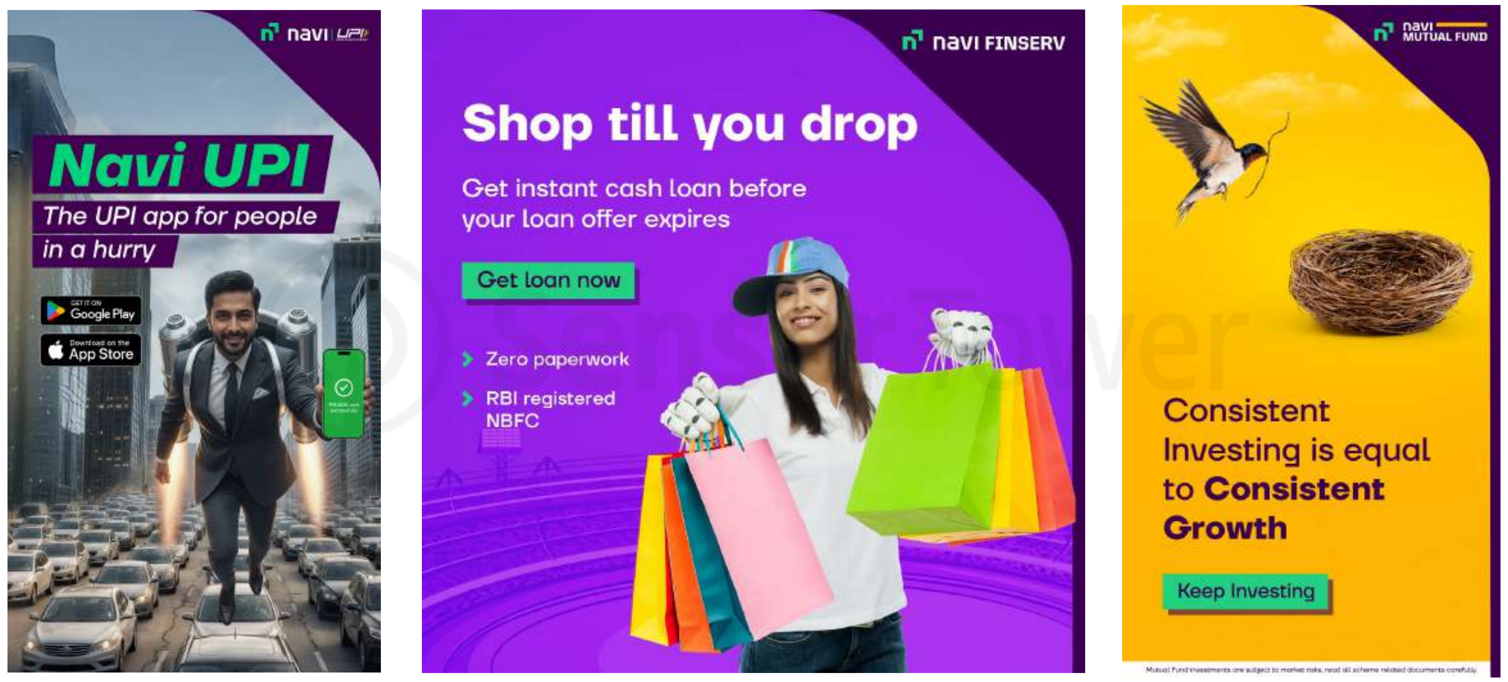
Launched as a digital lending platform, *Navi* has steadily expanded into a broader consumer finance app, spanning loans, insurance, and payments—aiming to increase usage frequency beyond one-time financial needs.

Navi Quarterly Downloads and Total Cumulative Downloads



Navi's growth has accelerated sharply as it expanded beyond lending into a broader consumer finance platform. Following UPI approval in late 2023, downloads and active usage scaled quickly through 2024, reflecting a shift from episodic credit use toward higher-frequency, everyday financial transactions anchored in payments.

Creative Gallery for Navi



Creatives have played a key role in reinforcing this transition. Recent campaigns emphasize UPI payments and daily spending scenarios—such as peer-to-peer transfers and merchant payments—rather than loans alone. This messaging reframes Navi as a practical, everyday finance app, helping drive adoption of new use cases and strengthening user retention.

India's Banking Apps See Renewed Momentum as Redesigns and New Entrants Reshape Competition

India's mobile banking landscape remains led by incumbent institutions, but ranking stability at the top masks meaningful shifts beneath the surface. _Kotak 811_ retains strong download leadership, while legacy apps such as _YONO SBI_ and _IPPB_ show flatter movement—highlighting the challenge traditional banks face in sustaining acquisition without meaningful product refreshes.

Growth, however, is increasingly driven by new app launches, relaunches, and experience-led upgrades. The early access rollout of _HDFC Bank_'s new app, alongside gains from _Cent eeZ_, _JioFinance_, and _IOB Connect_, signals a renewed push to modernize mobile banking experiences. These patterns suggest India's banks are entering a new phase of competition—where incremental growth depends less on brand alone and more on usability, onboarding speed, and expanded everyday financial use cases.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Consumer Banking Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Downloads

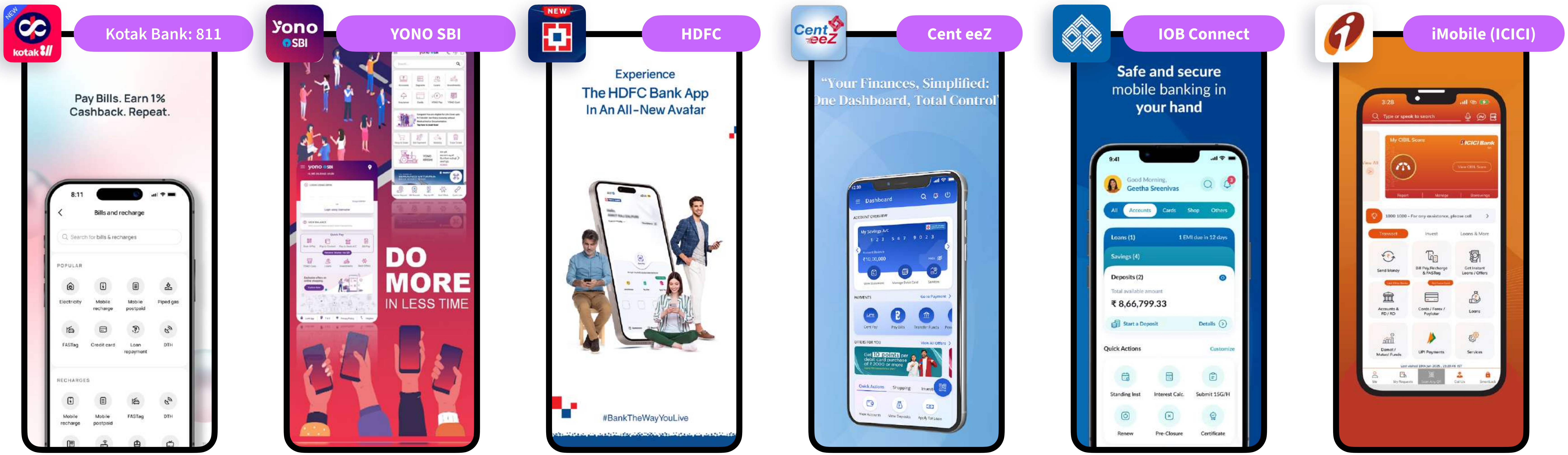
Rank	App	vs Previous
1	Kotak Bank: 811 Mobile App	▲ 13
2	YONO SBI: Banking & Lifestyle	▼ 1
3	IPPB Mobile Banking	▼ 1
4	HDFC Bank App (Early Access)	▲ 149
5	IDFC FIRST Bank: MobileBanking	▲ 2
6	IndSMART IndianBank Mobile App	▲ 3
7	PNB ONE	▼ 3
8	HDFC Bank MobileBanking App	▼ 3
9	Axis Mobile: Pay, Invest & UPI	▼ 6
10	Yono Lite SBI - Mobile Banking	▼ 2

Downloads Growth

Rank	App	vs Previous
1	Kotak Bank: 811 Mobile App	▲ 13
2	HDFC Bank App (Early Access)	▲ 149
3	Kotak Bank	▲ 85
4	JioFinance: For your life!	▲ 16
5	Cent eeZ	▲ 215
6	IOB Connect - Mobile Banking	NEW
7	IndusInd Bank: Savings A/C, FD	▲ 4
8	IPPB Mobile Banking	▼ 1
9	YONO SBI UK	▲ 67
10	IndSMART IndianBank Mobile App	▲ 3

Banks Rebuild the Front Door by Adopting Fintech-Style Experiences

Source: Sensor Tower Mobile App Insights



After years of ceding engagement to fintechs, Indian banks are rebuilding their mobile front doors with clearer, consumer-first design. Recent app revamps from Kotak 811, HDFC, SBI, and ICICI emphasize simplified dashboards, faster payments, card-style navigation, integrated bill pay, and personalized shortcuts—mirroring fintech norms around speed, clarity, and everyday utility rather than legacy banking workflows.

These updates signal a strategic shift from transactional access to experience-led engagement. Features such as unified financial views, contextual offers, rewards, and lifestyle services aim to increase session frequency and relevance. While banks are narrowing the UX gap, they are still playing catch-up on discovery, habit formation, and ecosystem depth—areas where mobile-first fintechs continue to set the pace.

HDFC's App Migration Accelerates as Users Embrace a Mobile-First Redesign

HDFC Bank's Early Access app marks a strategic reset in how large incumbents approach mobile banking. Rather than layering features, the redesign centers on India's most frequent actions—UPI payments, transfers, and card management—reflecting a shift toward speed, clarity, and everyday usability.

By simplifying key flows and reducing steps for high-frequency tasks, the app aligns more closely with how customers actually bank on mobile. UPI is positioned as the primary entry point, reinforcing real-time payments as the core daily habit rather than a secondary feature.

The results are already visible. Within six months, nearly 60% of HDFC's users migrated to the new app, and D3–D7 retention now outpaces most peers. This rapid adoption highlights how focused UX innovation—not incentives alone—can drive meaningful engagement improvements at scale.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined.

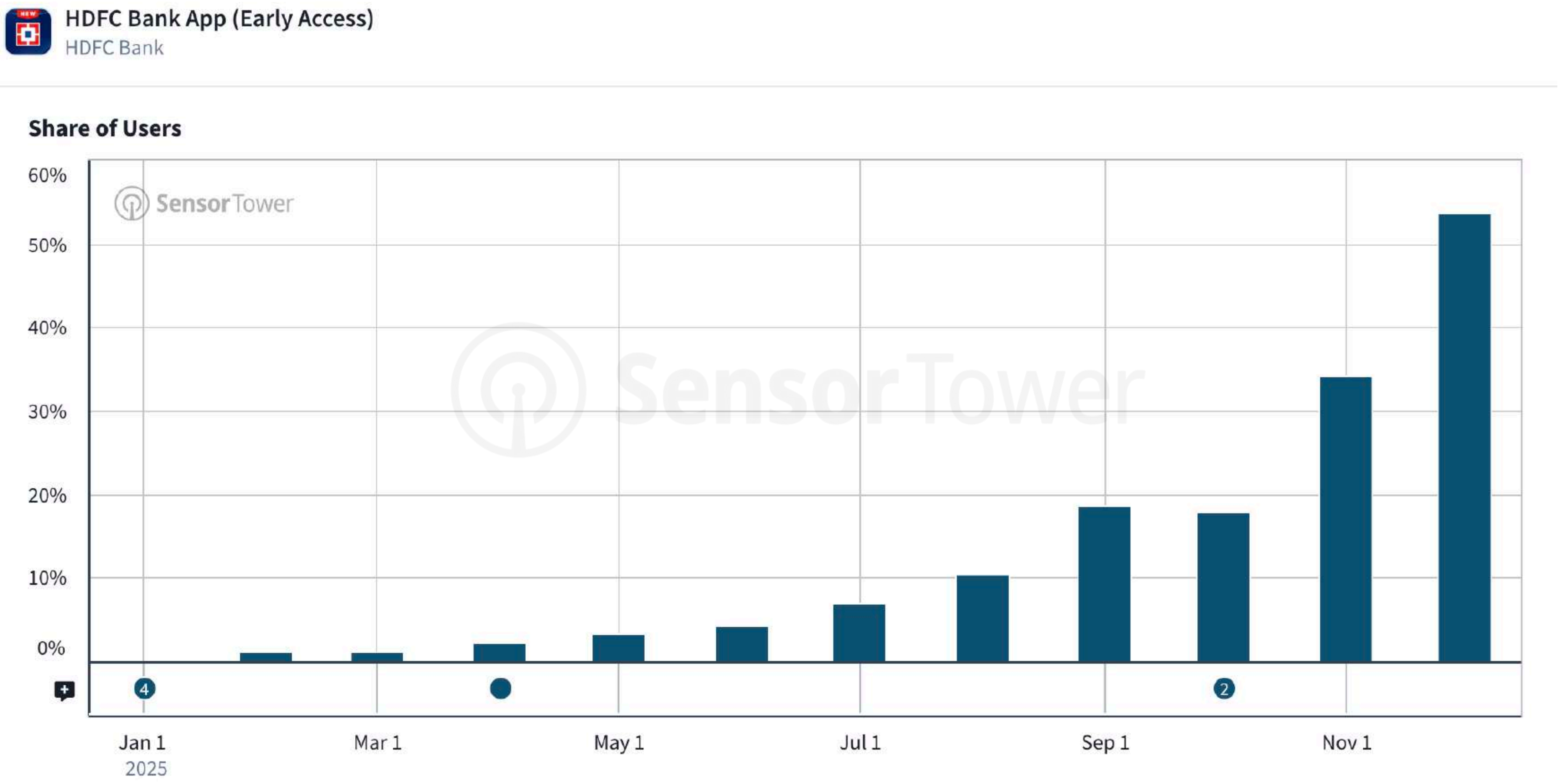
D3 - D7 Retention Among Top Consumer Banking Apps in India

December 2025

App	D3 Retention	D4 Retention	D5 Retention	D6 Retention	D7 Retention
HDFC Bank App (Early Access)	25.3%	23.3%	22.0%	21.1%	20.6%
Average of Next Top 10 Banking Apps	17.4%	15.2%	13.9%	12.9%	12.3%

HDFC Mobile Banking (Legacy) App Overlap Share of Users

January to December 2025



Entertainment Apps
Short-Form Content Redefines Mobile Consumption

Short Drama Emerges as the Fastest-Growing Format in India's Entertainment App Market

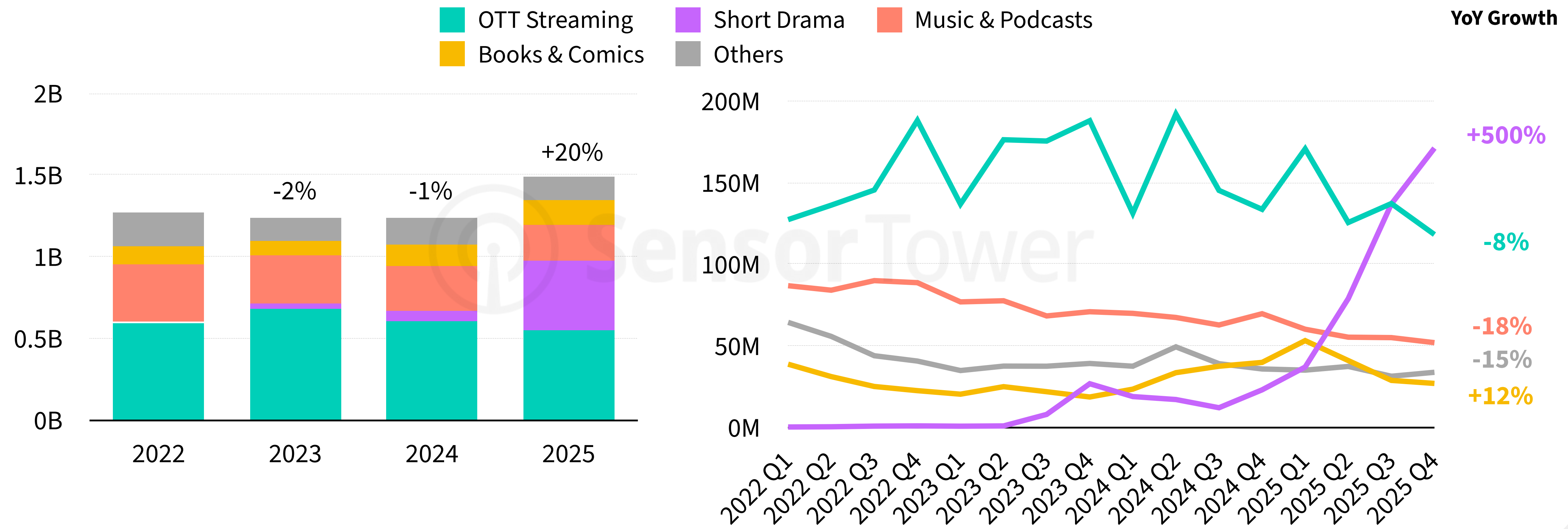
India's entertainment app downloads remain dominated by established segments such as OTT video and music, which continue to account for the bulk of total installs. Growth, however, is increasingly coming from short drama platforms, which expanded rapidly through 2024–2025 and meaningfully increased their share of total downloads—signaling a shift toward format-led discovery rather than broad, all-purpose consumption.

Monetization trends reinforce this momentum. While OTT and music apps still generate the largest absolute IAP revenue, short drama shows the strongest growth trajectory, outpacing other entertainment sub-segments. Episodic storytelling, bite-sized consumption, and pay-per-content mechanics are driving higher conversion efficiency, positioning short drama as one of the most commercially scalable new formats in India's evolving entertainment ecosystem.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

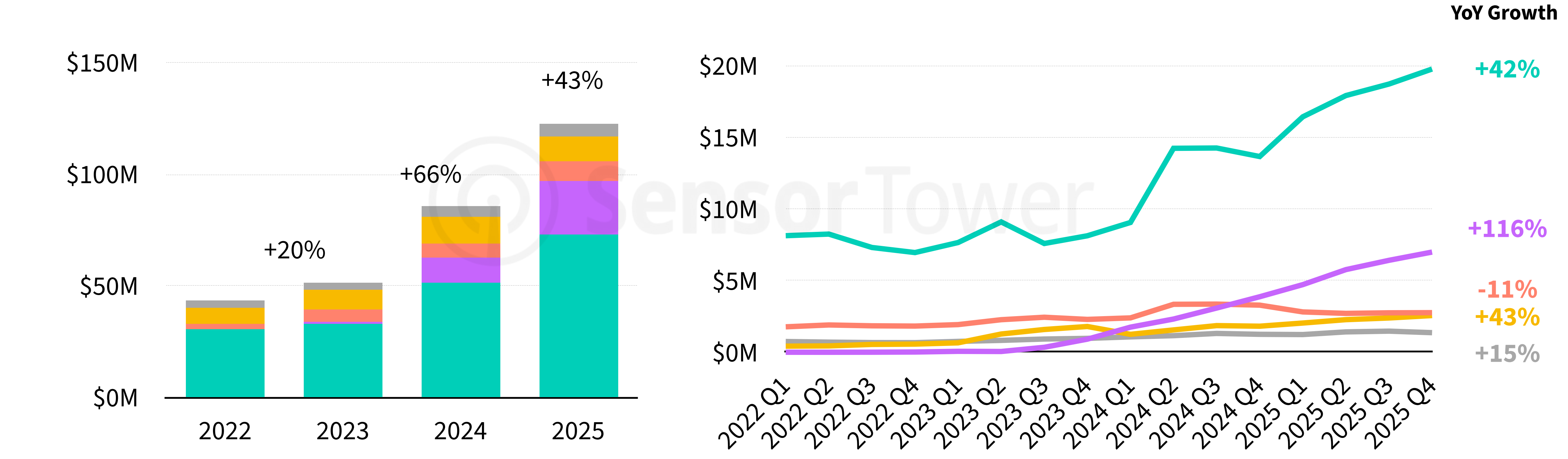
Media & Entertainment Apps Downloads Trends in India

2022-2025



Media & Entertainment Apps IAP Revenue Trends in India

2022-2025



Short Drama Apps Surge as Snackable Storytelling Reshapes India's Entertainment Landscape

Short drama platforms are now a major driver of momentum in India's entertainment app market. *Kuku TV* leads downloads in 2025, with *Story TV* and *QuickTV* also ranking near the top, highlighting strong demand for episodic, reel-length storytelling optimized for mobile-first viewing. Established OTT and music apps like *JioHotstar*, *Spotify*, and *Sony LIV* show steadier positions, reflecting their mature user bases.

Revenue leadership remains concentrated among OTT incumbents. Sony LIV and Amazon Prime Video top IAP rankings, followed by JioHotstar and ZEE5, supported by sports, originals, and subscriptions. At the same time, short drama apps such as DramaBox and ReelShort are emerging on revenue charts, signaling improving monetization from high-frequency, snackable consumption.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Top Media & Entertainment Apps India Unified • Jan 1, 2025 - December 31, 2025

Downloads

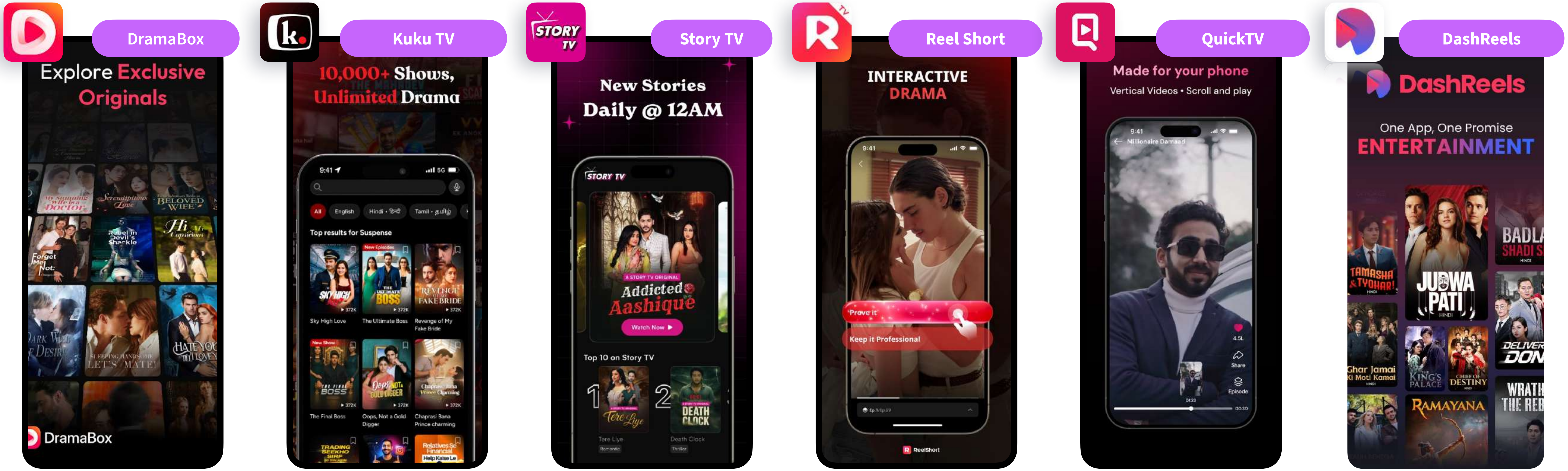
Rank	App	vs Previous
1	Kuku TV: Reel Shows & Movies	▲ 33
2	JioHotstar	=
3	Spotify: Music and Podcasts	=
4	Story TV - Watch Short Dramas	NEW
5	MX Player: Video Player & OTT	=
6	Kuku FM: Audiobooks & Stories	▲ 4
7	QuickTV - Short Drama & Movies	NEW
8	JioSaavn - Music & Podcasts	▼ 2
9	Sony LIV: Sports & Entmt	▼ 1
10	ZEE5 Movies, Web Series, Shows	▲ 1

IAP Revenue

Rank	App	vs Previous
1	Sony LIV: Sports & Entmt	▲ 1
2	Amazon Prime Video	▲ 6
3	JioHotstar	▼ 2
4	DramaBox - Stream Drama Shorts	=
5	ZEE5 Movies, Web Series, Shows	▲ 2
6	Spotify: Music and Podcasts	▲ 4
7	Crunchyroll	▲ 2
8	YouTube Music	▲ 3
9	ReelShort - Stream Drama & TV	▲ 4
10	aha - 100% Local Entertainment	▲ 4

Global Leaders and Local Innovators
Fuel the Rise of Short-Drama Apps in India

Source: Sensor Tower Mobile App Insights



India's short-drama category has scaled rapidly as users gravitate toward serialized, bite-sized storytelling designed for frequent, mobile consumption. Global leaders like DramaBox have set the pace, proving demand for vertical-video dramas with high release velocity and cliffhanger-driven formats that encourage daily return behavior and sustained engagement.

Local and regional platforms—including Kuku TV, Story TV, ReelShort, Quick TV, and DashReels—are differentiating through localization and product innovation. These apps emphasize vernacular content, frequent episode drops, and interactive mechanics such as choices, reactions, and rewards, while experimenting with hybrid monetization models that blend advertising, micro-transactions, and episodic in-app purchases. Together, these strategies are positioning short drama as one of India's fastest-evolving mobile entertainment formats.

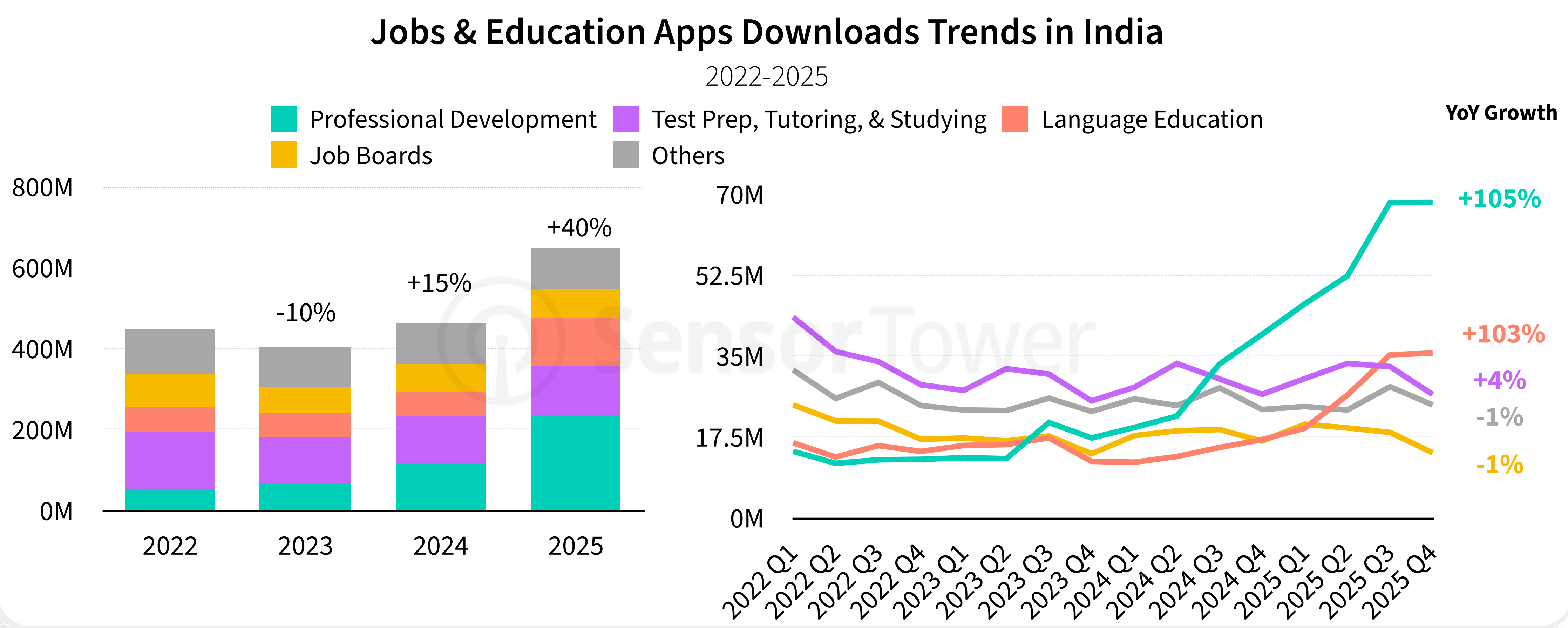
Education & Jobs
Video-First Learning Accelerates Engagement and Spend

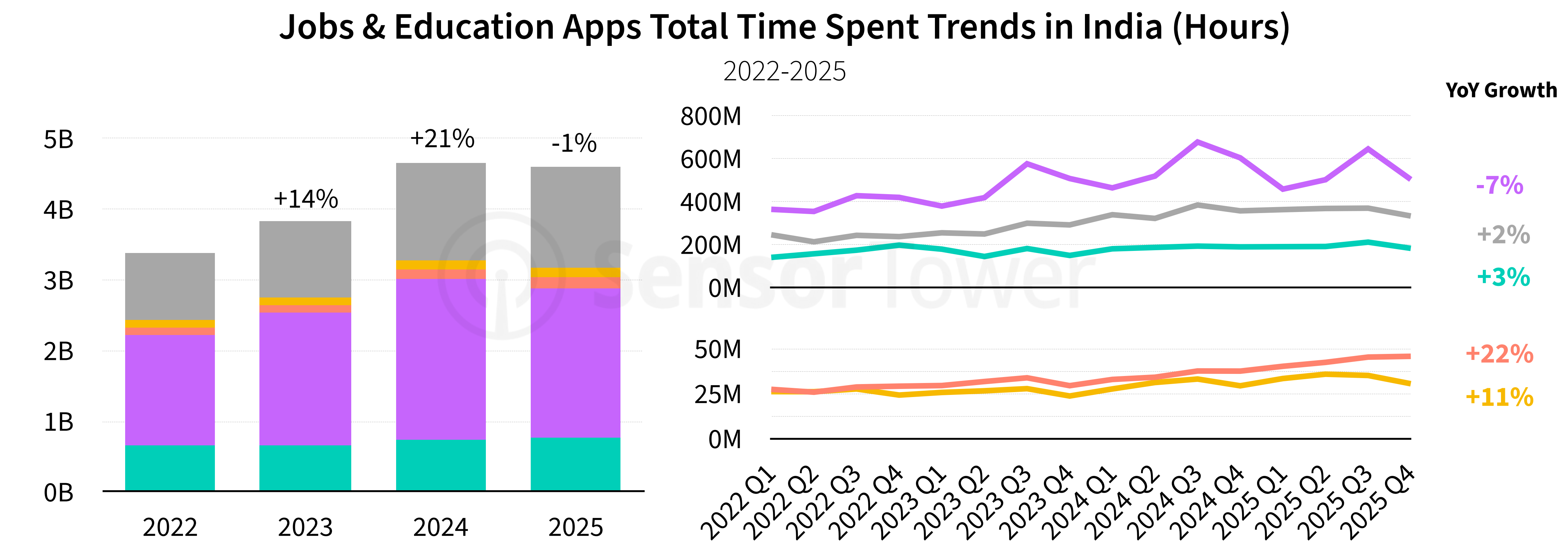
Jobs & Education Apps Expand as Learning and Employment Go Mobile-First

India's Jobs & Education apps continue to scale steadily, supported by sustained demand for professional development, test preparation, and job access. While download growth has moderated from earlier surge years, installs remain resilient—driven by students, early-career professionals, and users in Tier-2 and Tier-3 cities as learning and job discovery shift decisively to mobile.

Engagement trends point to deeper reliance on these platforms. Total time spent has grown faster than downloads, reflecting more frequent and ongoing usage for upskilling, certifications, interview prep, and applications. This divergence signals a transition from one-off course discovery to continuous, outcome-driven engagement, positioning education and employment apps as long-term habit platforms rather than episodic utilities.

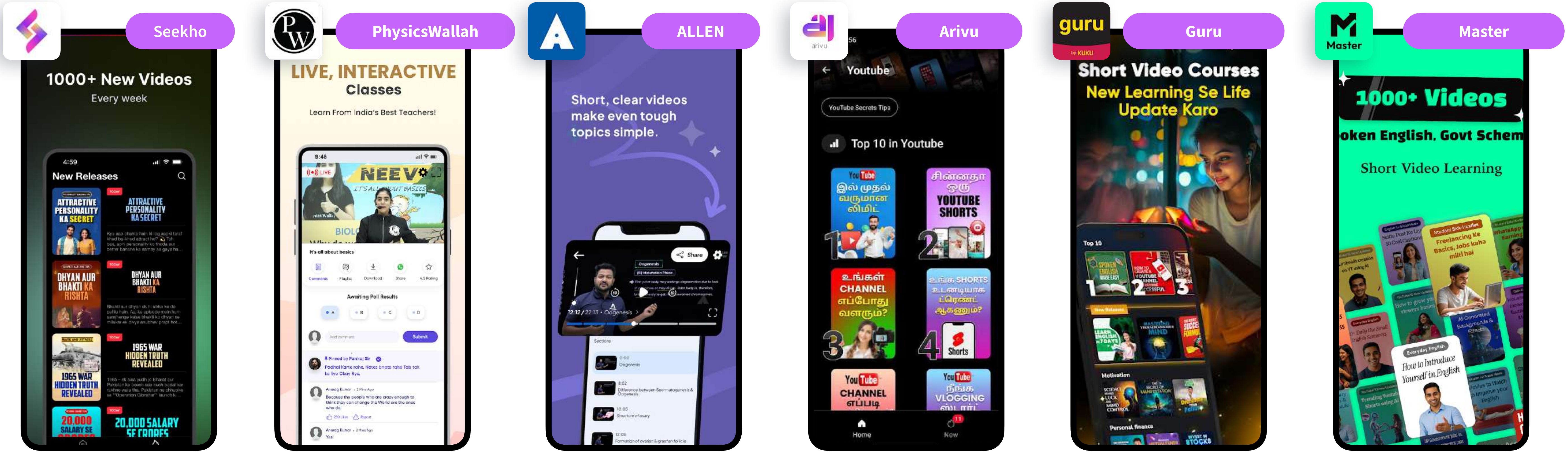
Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.





Short Video Emerges as the Next Growth Engine for Learning Apps in India

Source: Sensor Tower Mobile App Insights



After the rapid rise and correction of India's education app market, short-form video has emerged as the format driving the category's renewed momentum. The success of short-drama apps familiarized users with snackable, mobile-first storytelling, conditioning audiences for frequent, low-commitment consumption. Education platforms have since adapted this playbook, shifting away from long lectures toward short, engaging clips that fit naturally into daily routines.

By 2025, this shift has helped education apps regain scale and relevance beyond COVID-era peaks. Platforms like *PhysicsWallah* have stabilized the category, while short-learning apps such as *Seekho*, *Guru (by Kuku)*, and *Master* have accelerated adoption with 2–5 minute, practical lessons tied to careers, skills, and everyday life. *Master's* recent rise into the top global education apps highlights how short video—borrowed from the drama and entertainment wave—has become the primary growth driver reshaping how Indians learn on mobile.

Short-Form Learning Reshapes India's Jobs & Education App Market

Short learning video platforms now dominate downloads across India's Jobs & Education category. Seekho leads in 2025, with fast-rising entrants such as English Seekho, Guru, and Arivu highlighting strong demand for bite-sized, mobile-first skill content. Traditional job platforms like Naukri and LinkedIn show steadier movement, reflecting a more mature hiring audience.

Growth rankings reveal where momentum is building. New short-learning apps—spanning English speaking, micro-courses, and AI-assisted instruction—drive most incremental gains, pointing to low-friction adoption and rapid experimentation. The category is shifting from credential-led platforms toward continuous, practical upskilling embedded in daily mobile behavior.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Jobs & Education Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Downloads

Rank	App	vs Previous	
1	Seekho: Short Learning Videos	=	
2	Duolingo - Language Lessons	=	
3	English Seekho : Learning App	NEW	
4	Guru: Short Videos App	▲	71
5	Naukri - Job Search App	▲	1
6	LinkedIn: Network & Job Finder	▼	3
7	SpeakX - English Speaking App	▲	11
8	PW - India's Learning Platform	▼	1
9	Arivu: Short Learning Videos	NEW	
10	Supernova AI: Spoken English	NEW	

Downloads Growth

Rank	App	vs Previous	
1	Seekho: Short Learning Videos	=	
2	English Seekho : Learning App	NEW	
3	Guru: Short Videos App	▲	71
4	Arivu: Short Learning Videos	NEW	
5	SpeakX - English Speaking App	▲	11
6	Supernova AI: Spoken English	NEW	
7	Master : Watch Reels & Learn	NEW	
8	Nerchuko: Short Learning App	NEW	
9	Zudo: 1000+ Short Courses		
10	GyanTV: Short Learning Videos	NEW	

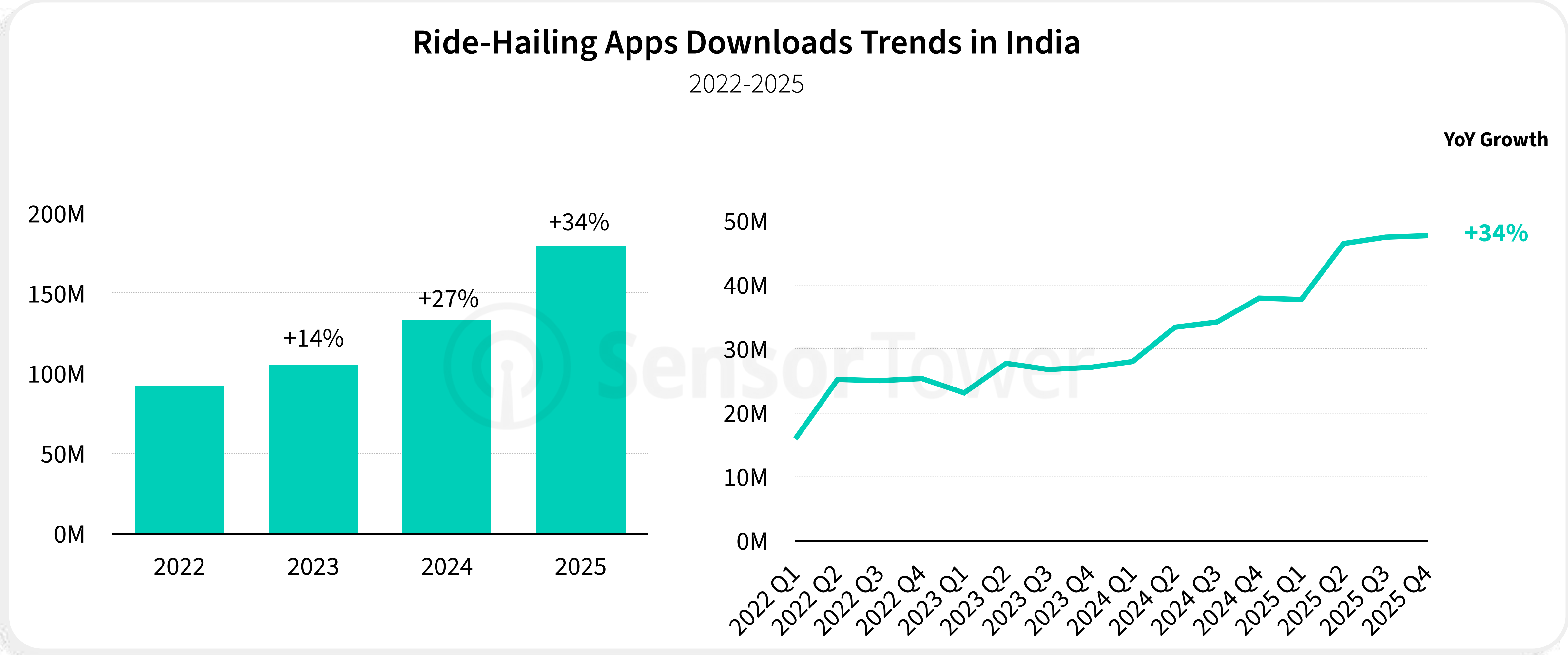
Emerging Segments
Mobility and Social Discovery Embed Into Digital Routines

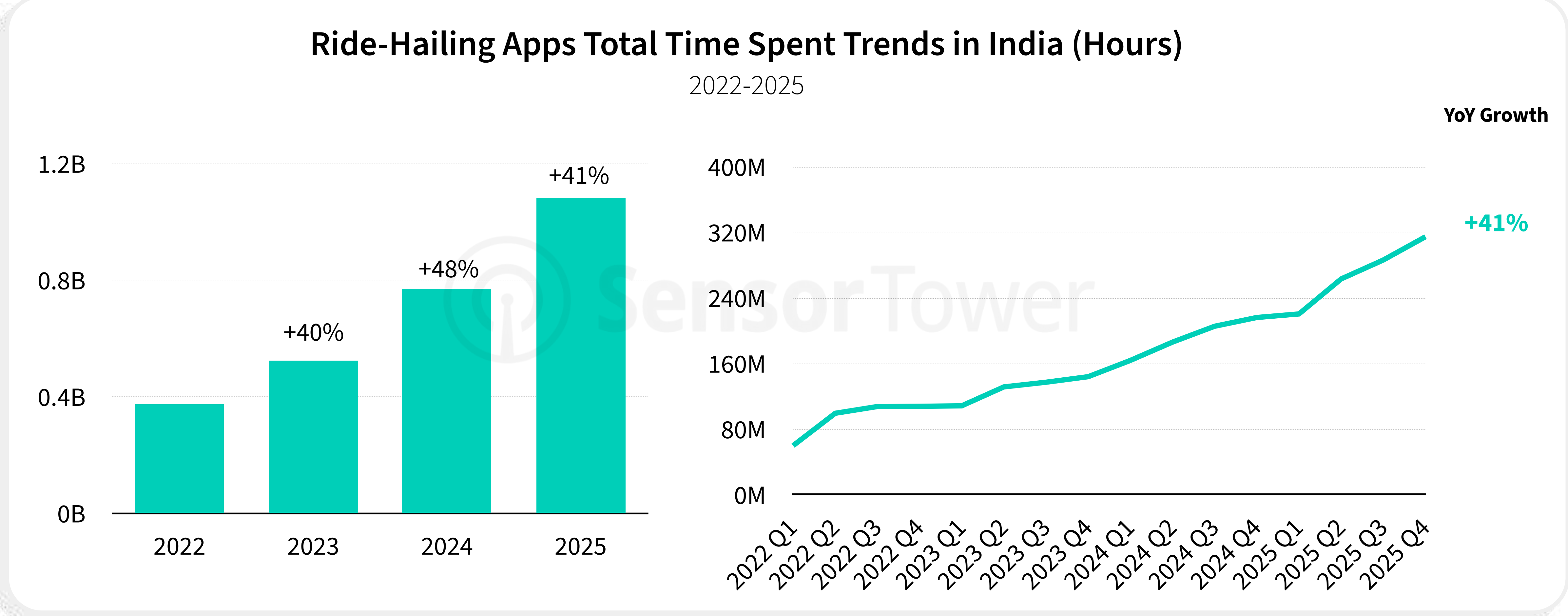
Ride-Hailing Become Core to India's Daily Mobility

India's ride-hailing apps continue to grow at a steady clip, with downloads accelerating through 2024–2025. Adoption reflects rising demand for cost-efficient, flexible mobility—particularly for daily commuting and short-distance travel—as congestion, fuel costs, and price sensitivity push users toward shared and on-demand ride options.

Engagement trends point to even stronger momentum. Total time spent has increased faster than installs, signaling higher usage frequency and repeat reliance for everyday transportation. As these platforms move beyond occasional trips to routine usage, carpooling and ridesharing are evolving into habit-driven utilities embedded in India's daily mobility behavior.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.





Ride-Hailing Leaders Maintain Scale as Growth Shifts to Drivers and Regional Mobility

India's ride-hailing market is now led by _Rapido_, which has overtaken established players like _Uber_ and _Ola_ by scaling bike taxis and autos across urban and regional markets. Stable rankings year over year reflect a mature category, but *Rapido's* lead highlights how affordability and everyday use cases are reshaping mobility leadership.

Growth is shifting toward adjacent layers of the ecosystem. Driver-focused apps such as *Rapido Captain*, *Uber Driver*, and *Ola Driver* continue to gain traction, while regional and niche services like *BlaBlaCar* and *Odisha Yatri* are growing faster from smaller bases—pointing to expansion driven by geographic depth and specialized mobility needs rather than headline scale.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Ride-hailing Apps By Downloads in India Unified • Jan 1, 2025 - December 31, 2025

Downloads

Rank	App	vs Previous
1	Rapido: Bike-Taxi, Auto & Cabs	=
2	Uber - Request a ride	=
3	Ola: Book Cab, Auto, Bike Taxi	=
4	Rapido Captain	▲ 1
5	Uber - Driver: Drive & Deliver	▲ 1
6	Ola Driver	▲ 1
7	BlaBlaCar: Carpooling and Bus	▲ 1
8	inDrive. Rides with fair fares	▼ 4
9	Namma Yatri - Ride Booking App	=
10	Grab - Taxi & Food Delivery	=

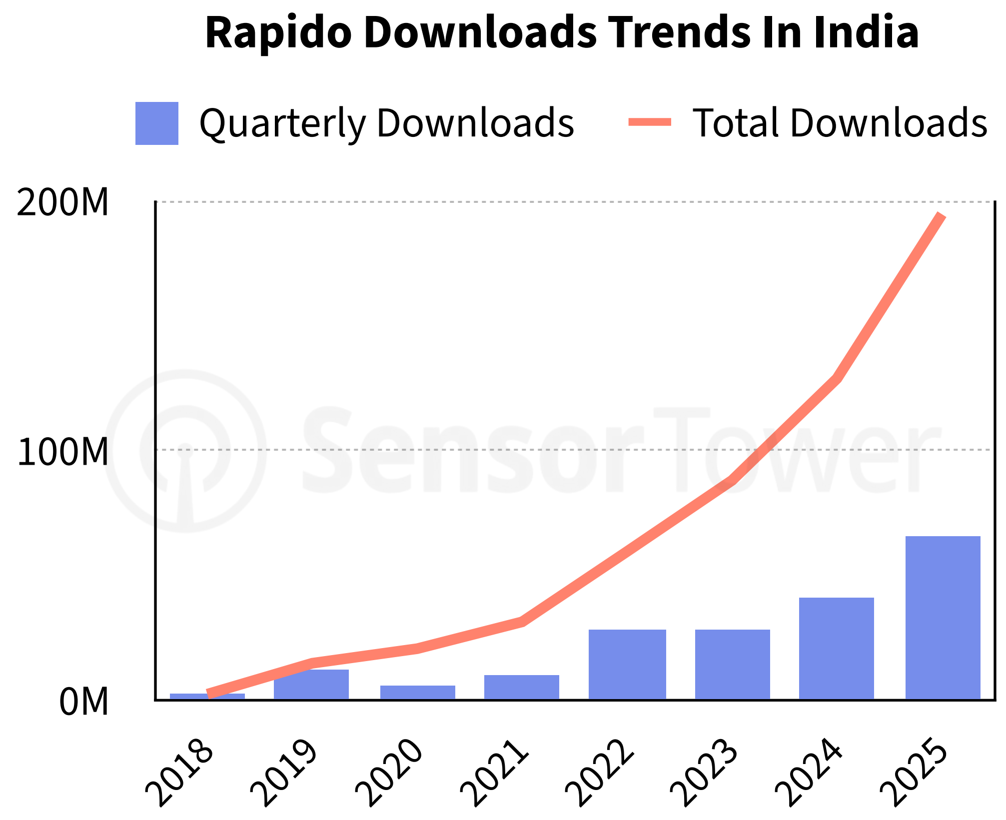
Downloads Growth

Rank	App	
1	Rapido: Bike-Taxi, Auto & Cabs	=
2	Uber - Request a ride	=
3	Rapido Captain	▲ 1
4	Uber - Driver: Drive & Deliver	▲ 1
5	BlaBlaCar: Carpooling and Bus	▲ 1
6	Ola Driver	▲ 1
7	Grab - Taxi & Food Delivery	=
8	Jugnoo	▲ 2
9	Odisha Yatri- Ride Booking App	▲ 6
10	ORAY Bus & Cabs-365 days offer	▲ 132

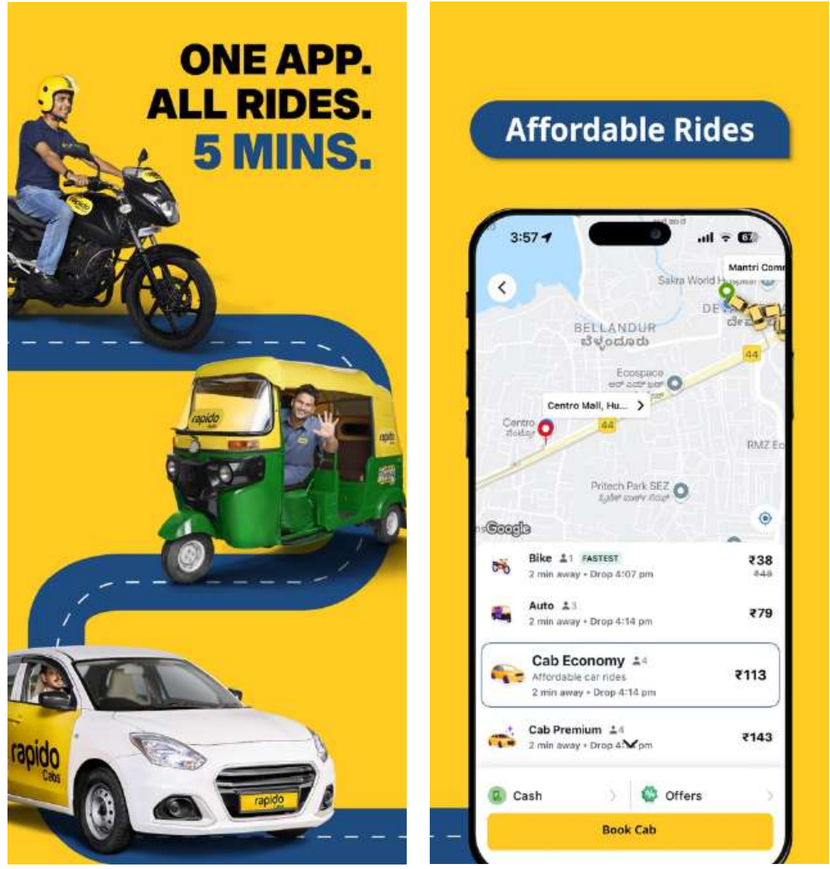
Rapido's Rise: From Bike Taxis to India's Daily Mobility Leader

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Rapido has emerged as a defining success story in India's ridesharing market by rethinking urban mobility around affordability, speed, and everyday use cases. Starting with bike taxis, the platform scaled rapidly by solving short-distance travel pain points and gradually expanded into a multi-modal mobility app serving millions across metros and smaller cities.



Rapido's downloads accelerated sharply after 2021, crossing 200 million lifetime installs as bike taxis expanded nationwide. The platform capitalized on dense urban demand for short-distance trips, turning two-wheeler mobility into a daily-use behavior and establishing Rapido as India's leading ridesharing app by volume.



By unifying bike taxis, autos, and affordable cabs in a single app, Rapido addressed India's price-sensitive mobility needs. Faster pickups, transparent pricing, and wide vehicle choice positioned the app as a practical alternative to traditional taxis for everyday commuting, errands, and last-mile travel.

Rapido's growth was reinforced by aggressive driver acquisition and retention campaigns, highlighting earnings stability and flexible work. Localized messaging helped rebuild supply across Tier-2 and Tier-3 cities, improving service reliability and enabling sustained expansion beyond metro-centric demand.

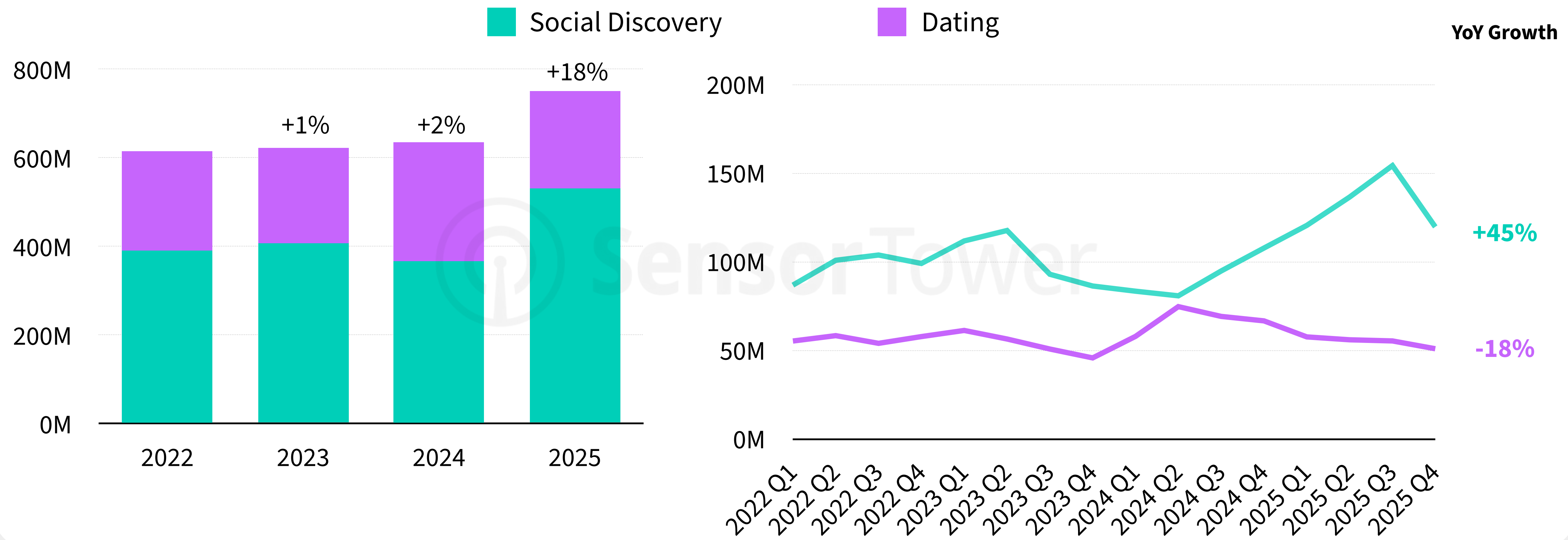
Dating Apps Holds Steady as Social Discovery Emerges as a Key Growth Driver

Downloads across Dating and Social Discovery apps rebounded in 2025, with growth increasingly driven by a new wave of social discovery platforms. These apps—often centered on voice, live video, and low-commitment interaction—are expanding the category beyond traditional dating and attracting users seeking casual, real-time connections.

Established dating platforms remain structurally different. Matrimony-led apps continue to anchor engagement around long-term intent, trust, and family alignment, resulting in steadier but slower expansion. Together, these trends reflect a broader shift in Indian digital behavior: dating remains purpose-driven, while social discovery captures evolving preferences for lighter, more exploratory forms of connection.

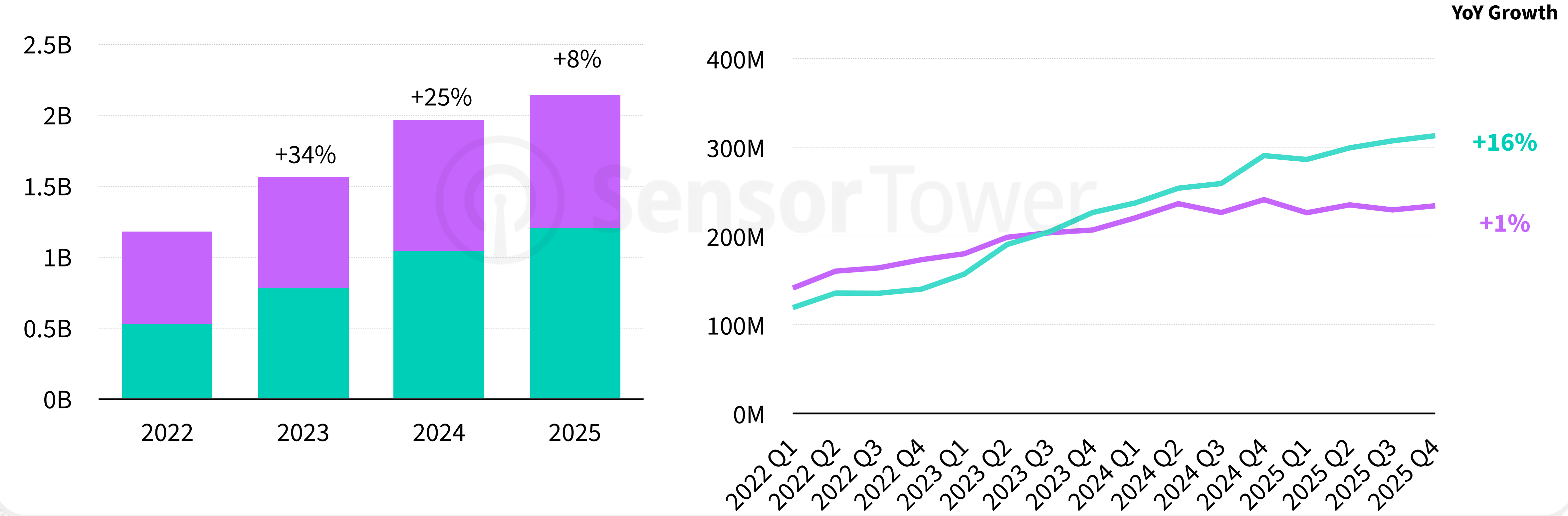
Dating & Social Discovery Apps Downloads Trends in India

2022-2025



Dating & Social Discovery Apps Total Time Spent Trends in India (Hours)

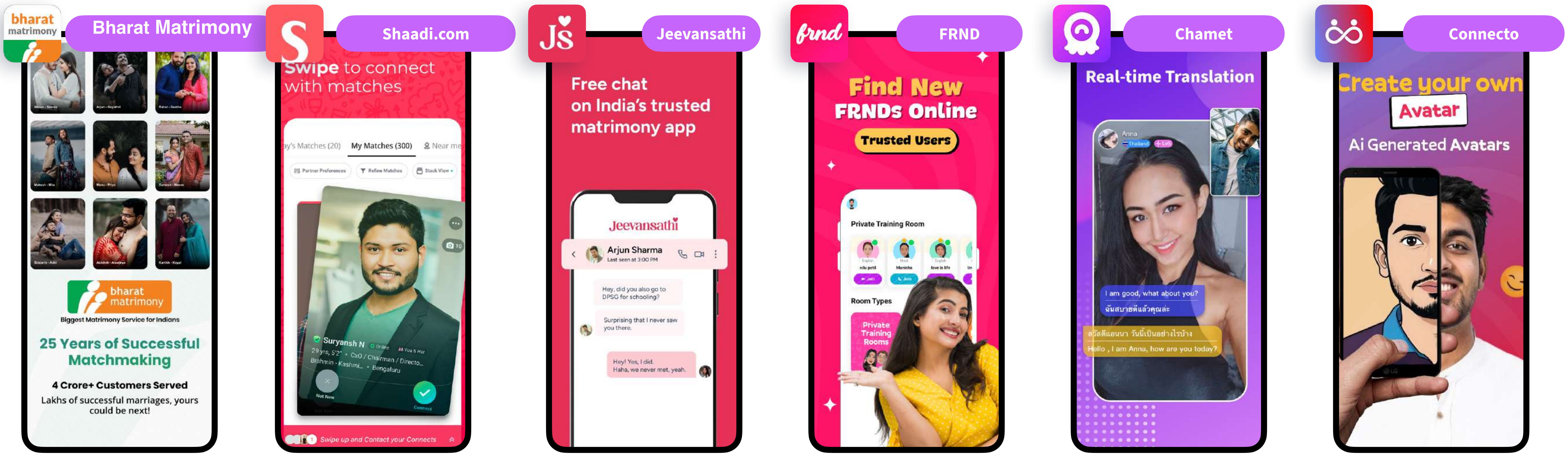
2022-2025



Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Matrimony vs. Social Discovery: Two Models, One Evolving Playbook

Source: Sensor Tower Mobile App Insights



India's matrimony apps have innovated around trust and intent—using deep profile verification, family participation, filters aligned to culture and values, and outcome-oriented matching to reduce friction in long-term decision-making. Their strength lies in credibility, structured journeys, and high-confidence matches built for life events, not casual use.

Social discovery apps, by contrast, innovate on engagement and accessibility. Live audio, video rooms, real-time translation, avatars, and creator-style hosting lower social barriers and encourage frequent, low-pressure interaction. The opportunity ahead is convergence: matrimony platforms can borrow lightweight interaction and discovery mechanics to engage younger users earlier, while social discovery apps can adopt trust signals and intent-based design to deepen relationships and retention over time.

Dating in India Remains Matrimony-Led as Social Discovery Expands Engagement

Dating in India remains closely tied to matrimonial intent, making the category structurally different from Western markets. Established platforms such as Bharat Matrimony, Shaadi, and Jeevansathi anchor MAU through trust, family acceptance, and long-term compatibility—resulting in stable engagement . Challenger apps like TrulyMadly and Polo App are gaining incrementally by modernizing flows and appealing to younger users, but still operate within this intent-led framework.

Social discovery, by contrast, attracts a broader and more casual audience. Voice- and live-video platforms such as FRND and Vibely are growing MAU faster by lowering commitment barriers and emphasizing real-time interaction and entertainment. This divergence highlights a clear split: dating in India prioritizes credibility and outcomes, while social discovery captures experimentation, frequency, and mass-market social engagement.

Source: Sensor Tower Mobile App Insights as of January 15, 2026.
Notes: iOS and Google Play combined. App categories are defined by Sensor Tower's App IQ Taxonomy, which includes custom-tailored groupings to reflect the dynamic market landscape.

Dating & Social Discovery Apps By MAU in India Unified • Jan 1, 2025 - December 31, 2025

Dating

Rank	App	vs Previous
1	Bharat Matrimony - Shaadi App	=
2	Shaadi.com - Indian Dating App	=
3	Jeevansathi Dating & Marriage	=
4	Tinder Dating App: Date & Chat	=
5	Bumble Dating App: Meet & Date	=
6	Grindr	▲ 2
7	QuackQuack Dating App in India	=
8	OmeTV – Video Chat Alternative	▼ 2
9	TrulyMadly: Indian Matchmaking	▲ 19
10	Polo App	NEW

Social Discovery

Rank	App	vs Previous
1	FRND: Talk to Friends Online	=
2	Chamet - Live Chat & Party	=
3	Connecto - Online Friendship	NEW
4	Achat - Global Voice Chat	▲ 1
5	Zeep Live - Video Chat & Party	▼ 2
6	Livetalk - Live Video Chat	▼ 2
7	Dostt: Talk & Feel Better	▲ 112
8	Vibely - Make new friends!	▲ 74
9	VoiceClub - Make Friend Online	▲ 55
10	VideoVibe Video Call	▲ 19

Conclusion

1

India Is Now a Value-Led Mobile Market

India's mobile economy has passed its acquisition peak. With scale firmly established, growth is now defined by retention, frequency, and monetization. The winners are apps that turn daily usage into durable revenue through subscriptions, services, and repeat behavior—not one-time installs.

2

Competition Is Intensifying Across Verticals

Across mature categories, expansion now comes from stealing share, not unlocking new users. Competition is intensifying as leaders defend scale while challengers win by sharpening propositions, lowering friction, and expanding into adjacent use cases.

3

Video and Real-Time Experiences Are the New Interface

Short-form video, live interactions, and creator-led formats have become default engagement layers across entertainment, commerce, education, and finance. These formats are no longer additive—they shape discovery, trust, and conversion across India's app ecosystem.

4

The Next Leaders Will Win on Local Relevance at National Scale

India's next phase will reward platforms that pair national reach with deep regional execution. Localization, affordability, and trust—combined with strong product fundamentals—will separate enduring category leaders from short-term growth stories.

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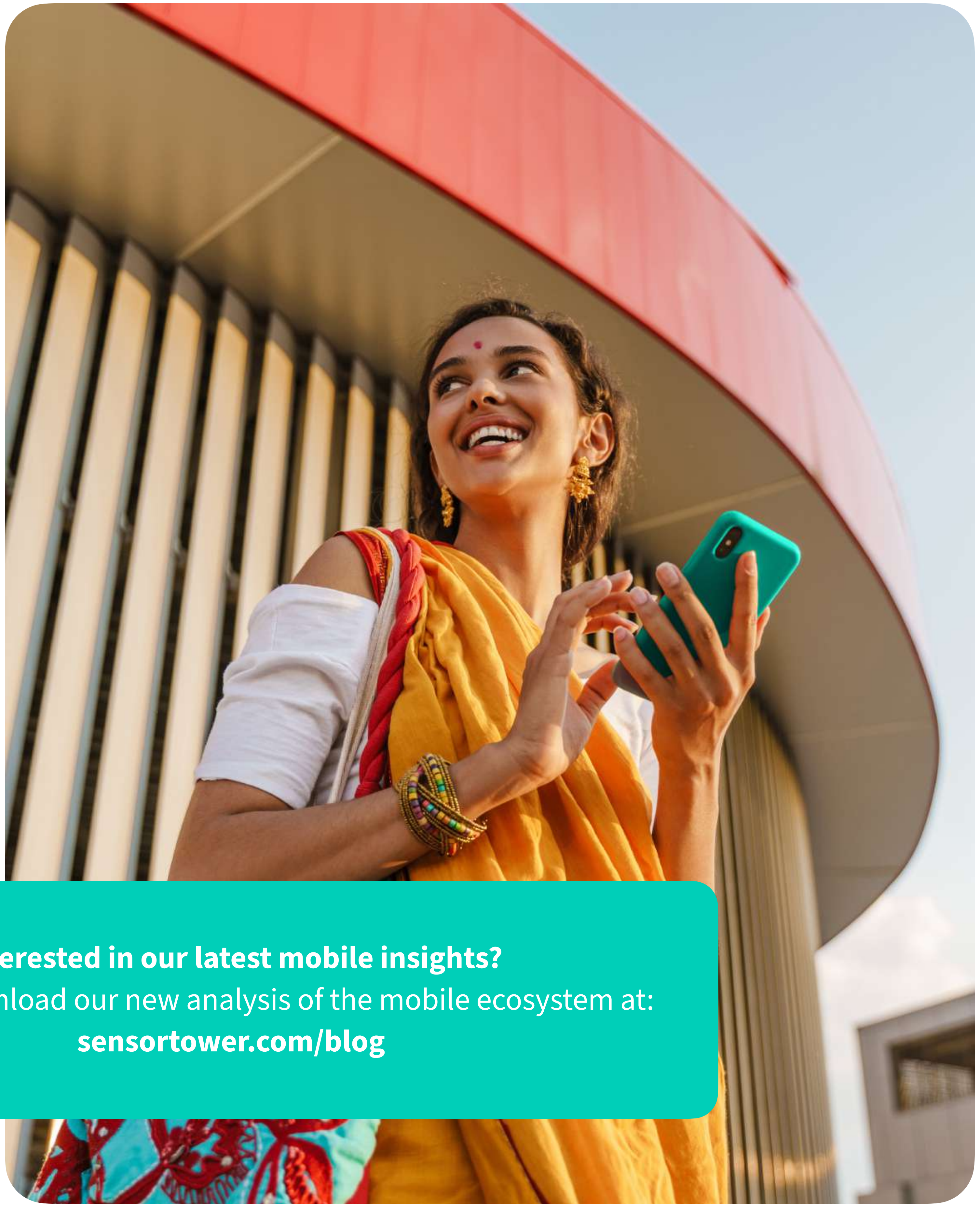

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APAC Insights Team

Author

Donny Kristianto
Principal Market Insights Manager
Singapore

Contributor

Hideyuki Tsuji
Mobile Insights Strategist
Tokyo

Contributor

Rui Ma
Senior Analyst, APAC
Hubei

Contributor

Nan Lu
Senior Director Marketing, APAC
San Francisco

Contributor

Daniel Zhang
Field Marketing Manager, GCR
Beijing

Contributor

Sara Tan
Marketing Operations, APAC
Singapore

Contributor

Yena You
Mobile Insights Strategist
Seoul

Contact Info: sensortower.com sales@sensortower.com

Sensor Tower
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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

Bengaluru
COWRKS Residency
Road, PURVA PREMIERE,
No 135/1, Residency Rd,
Ward No.76, Ashok
Nagar, Bengaluru,
Karnataka 560025, India

Contact Us

Press : press-apac@sensortower.com
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