

India State of Digital Advertising 2026



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.

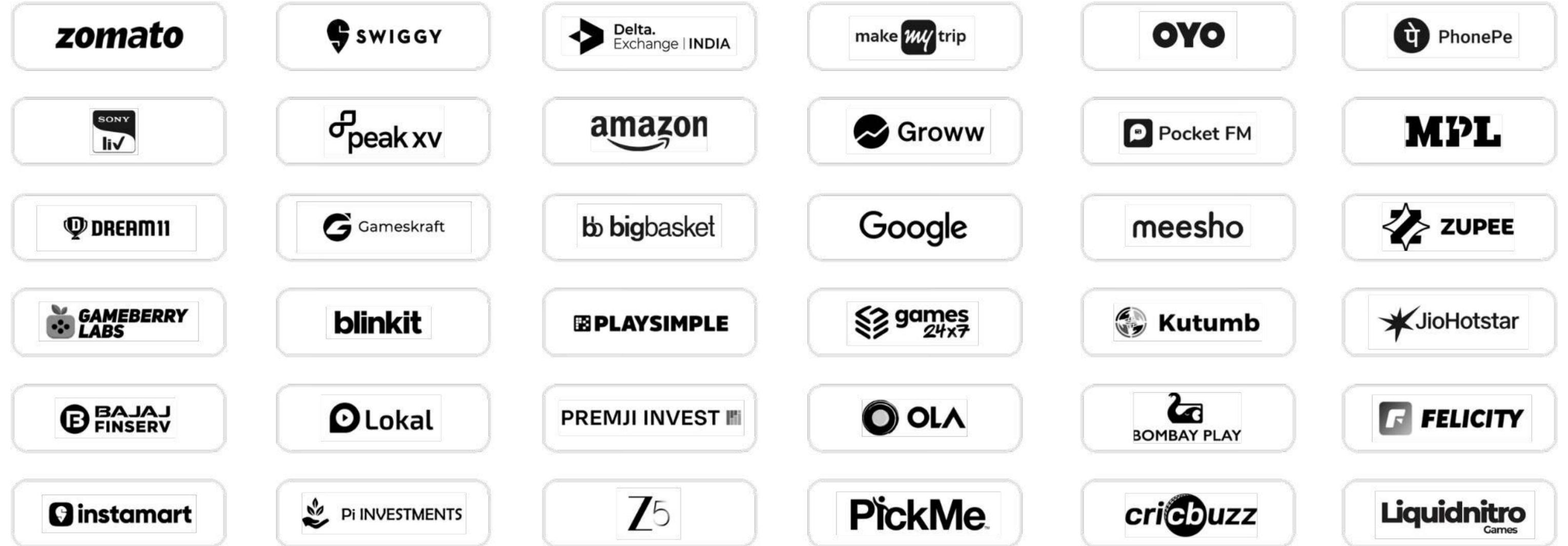
Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail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

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Business Inquiries: sales@sensortower.com



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



Sensor Tower

Solutions



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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.

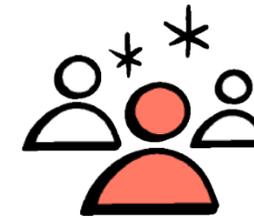


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App Advertising Insights

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.



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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).



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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.

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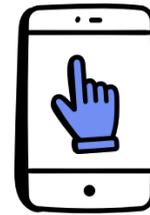
Solutions



Sensor Tower **Gaming Insights**

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

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



Sensor Tower **Advanced Usage Insights**

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

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



Sensor Tower **Pathmatics Retail Media Insights**

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

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



Sensor Tower **Video Game Insights**

Discover top game trends on PC and Console platforms

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

Sensor Tower

Data & Methodology

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

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

Digital Advertising Channels Supported by Pathmatics Across Markets

	Desktop Display and Video	Facebook Instagram	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	•	•		•	•	•		•	•	•	•	•	•

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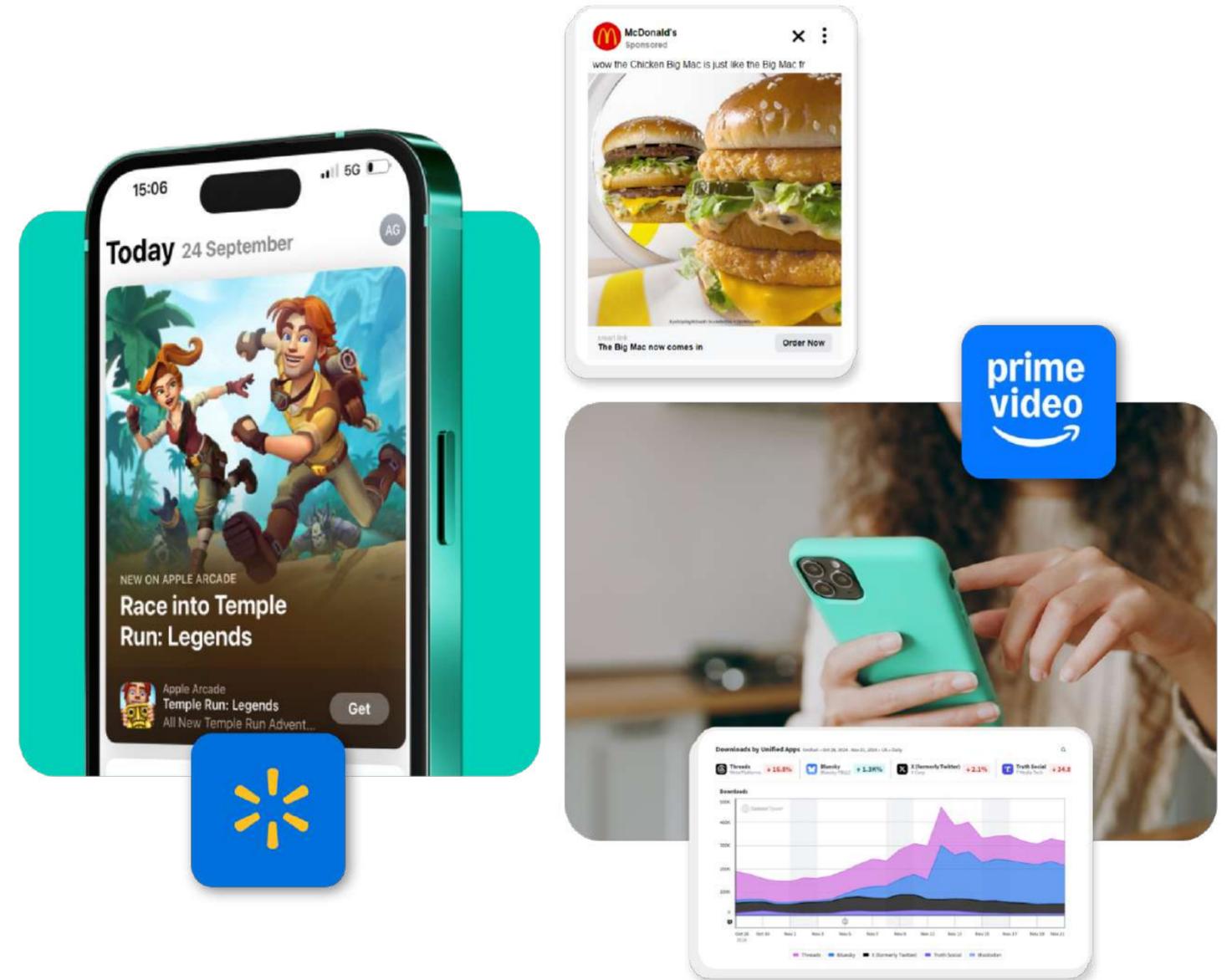
Executive Summary

This report delivers a comprehensive strategic analysis of India's digital advertising landscape in 2025, evaluating market scale, hyper-growth trajectories, and evolving seasonal fluctuations. It provides a data-driven overview of ad spend and impression dynamics, with a dedicated focus on high-impact sectors: Shopping, CPG, Automotive, and Financial Services.

By examining the digital advertising activity of leading advertisers—including Flipkart's *Big Billion Day* (Shopping), Marico (CPG), Hyundai (Automotive), and Wint Wealth (Financial Services)—the report explores patterns in creative execution, audience focus, and overall advertising presence.

Clarification on Downloads Data

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



Agenda

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India Digital Advertising Overview

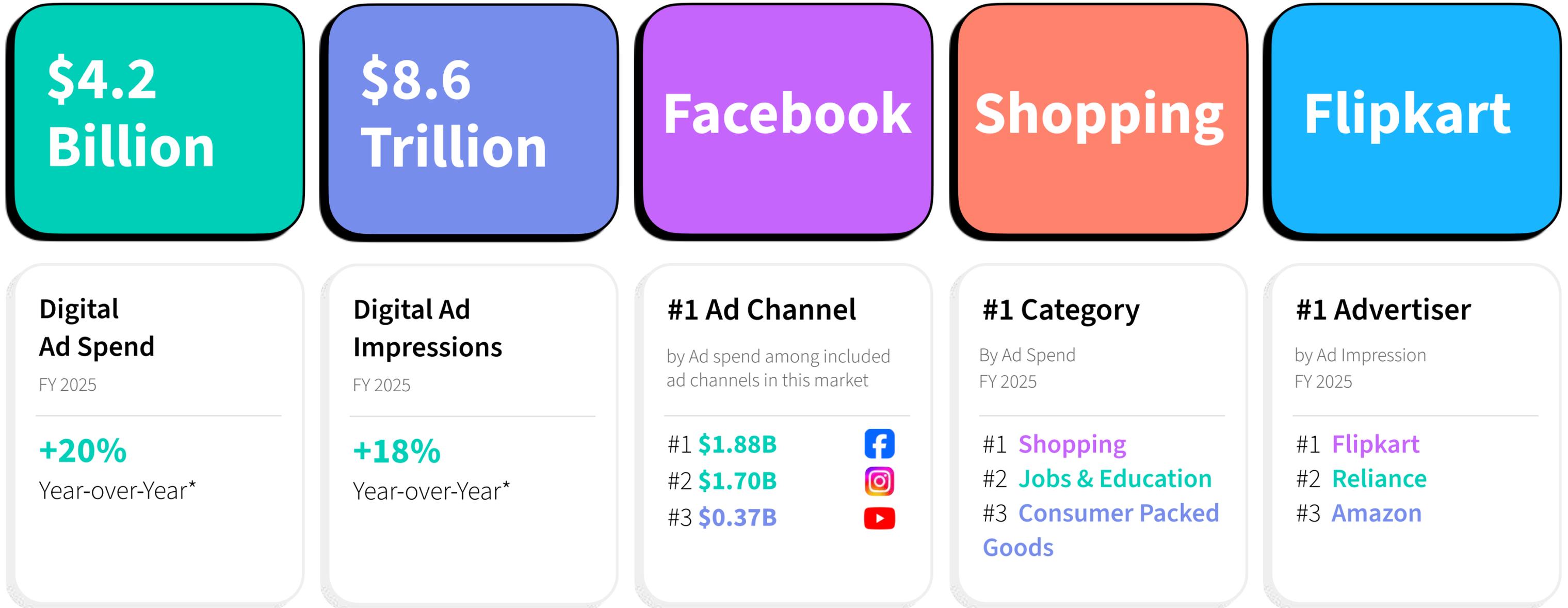
India's Digital Advertising Spend Exceeded \$4B in 2025

Source: Sensor Tower – Advertising Insights by Pathmatics as of Feb 3, 2026

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, Mobile Apps, and YouTube, covering the period from January to December 2025. YouTube data is available from April 2025 onward.

Ad spend estimates as of December 31, 2025. General spend includes creatives that aren't associated with a particular subcategory, creatives that feature products from several subcategories, or corporate ads.

*YouTube is excluded from the 2025 YoY calculation.

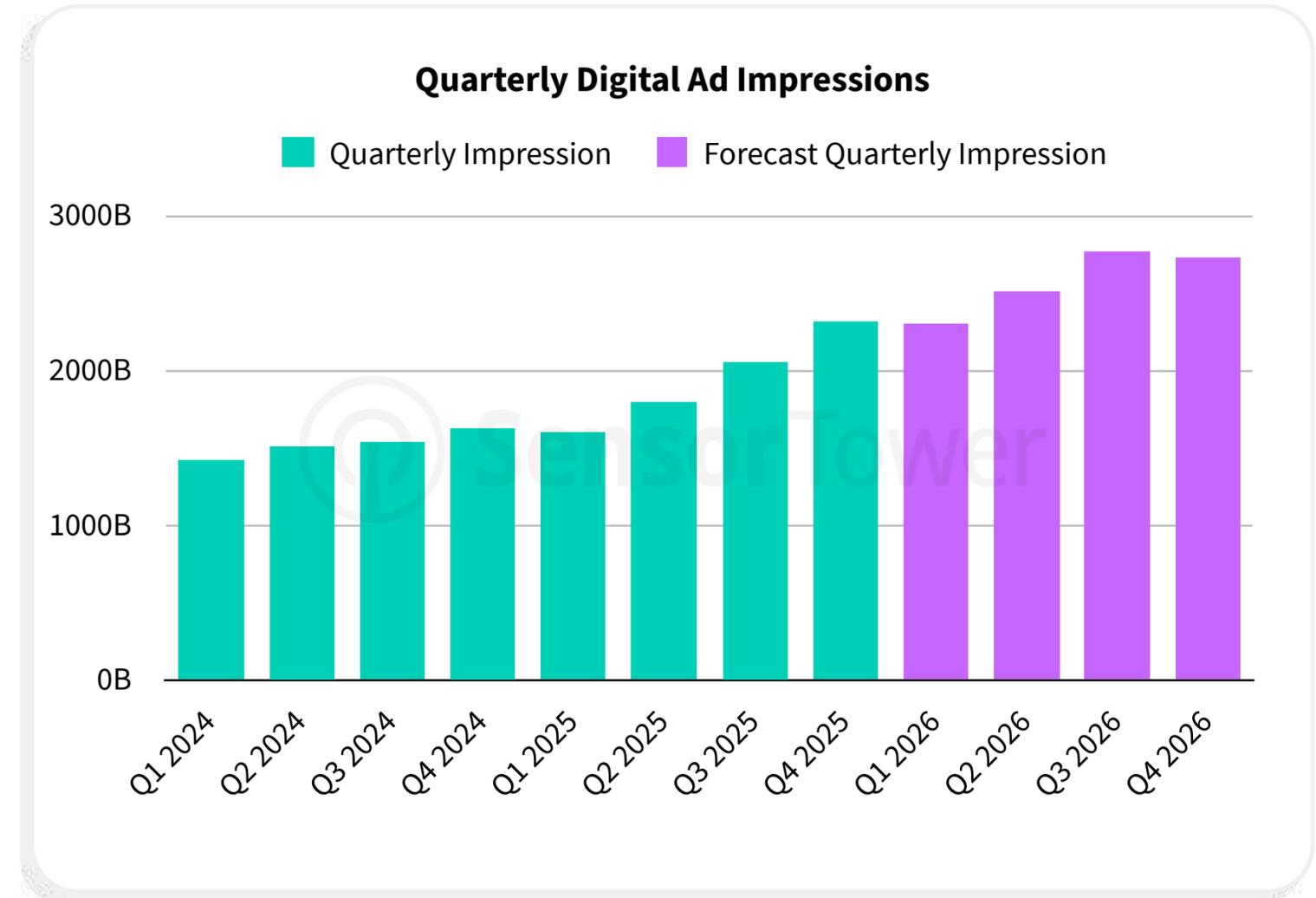
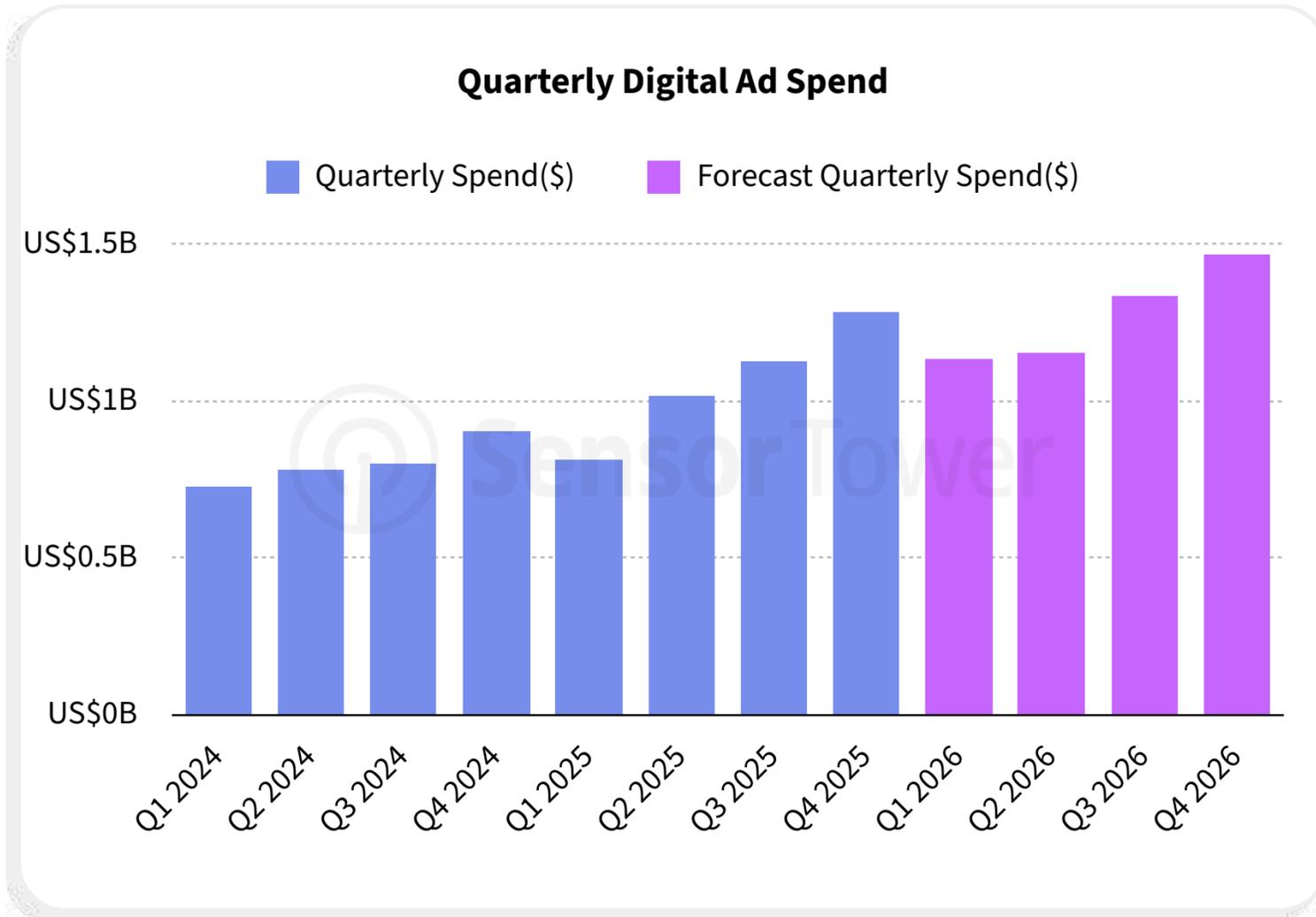


India's Digital Ad Spend Continues to Scale, Projected to Exceed \$5B by 2026

Source: Sensor Tower – Advertising Insights by Pathmatics as of Feb 3, 2026

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, Mobile Apps, and YouTube, covering the period from January to December 2025. YouTube data is available from April 2025 onward.

*YouTube is excluded from the 2025 YoY calculation.



Throughout 2025, digital advertising spending in India followed a **steady upward** trajectory, driven by sustained growth in shopping, software, and app-based services competing for consumer attention. Strong festive-season demand pushed monthly spend to over **\$430 million** in October.

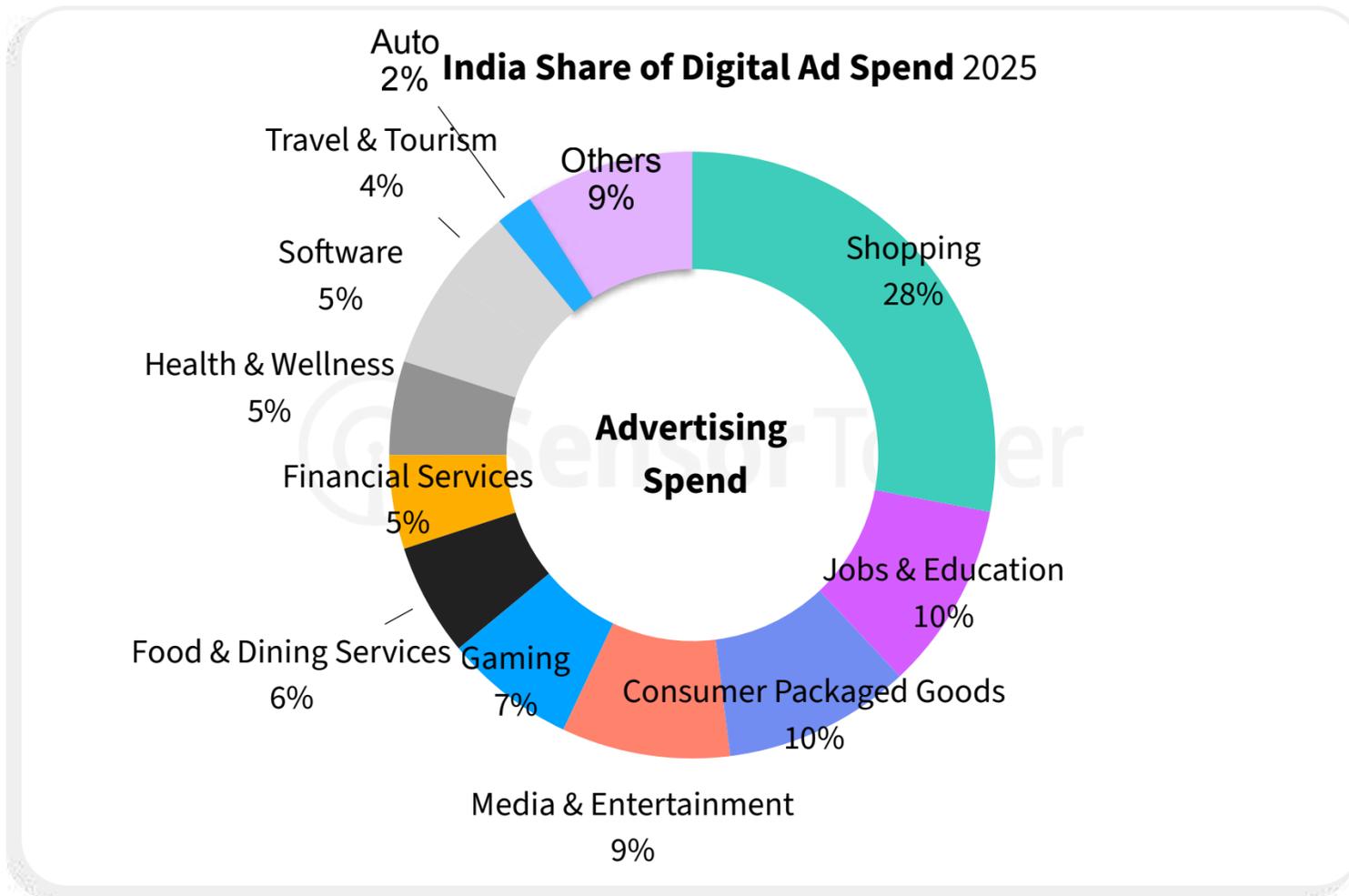
Impression delivery improved in H2 as advertisers scaled campaigns across performance and brand channels. The expansion of digital advertising platforms, with greater creative diversification and the growing importance of online channels, contributed to an **11% increase** in total impressions versus H1, with average monthly impressions in H2 exceeding **\$780 billion**.

Decoding India's Digital Ad Growth Engine: Shopping Drives Scale, Food & Dining Fuels Growth Momentum

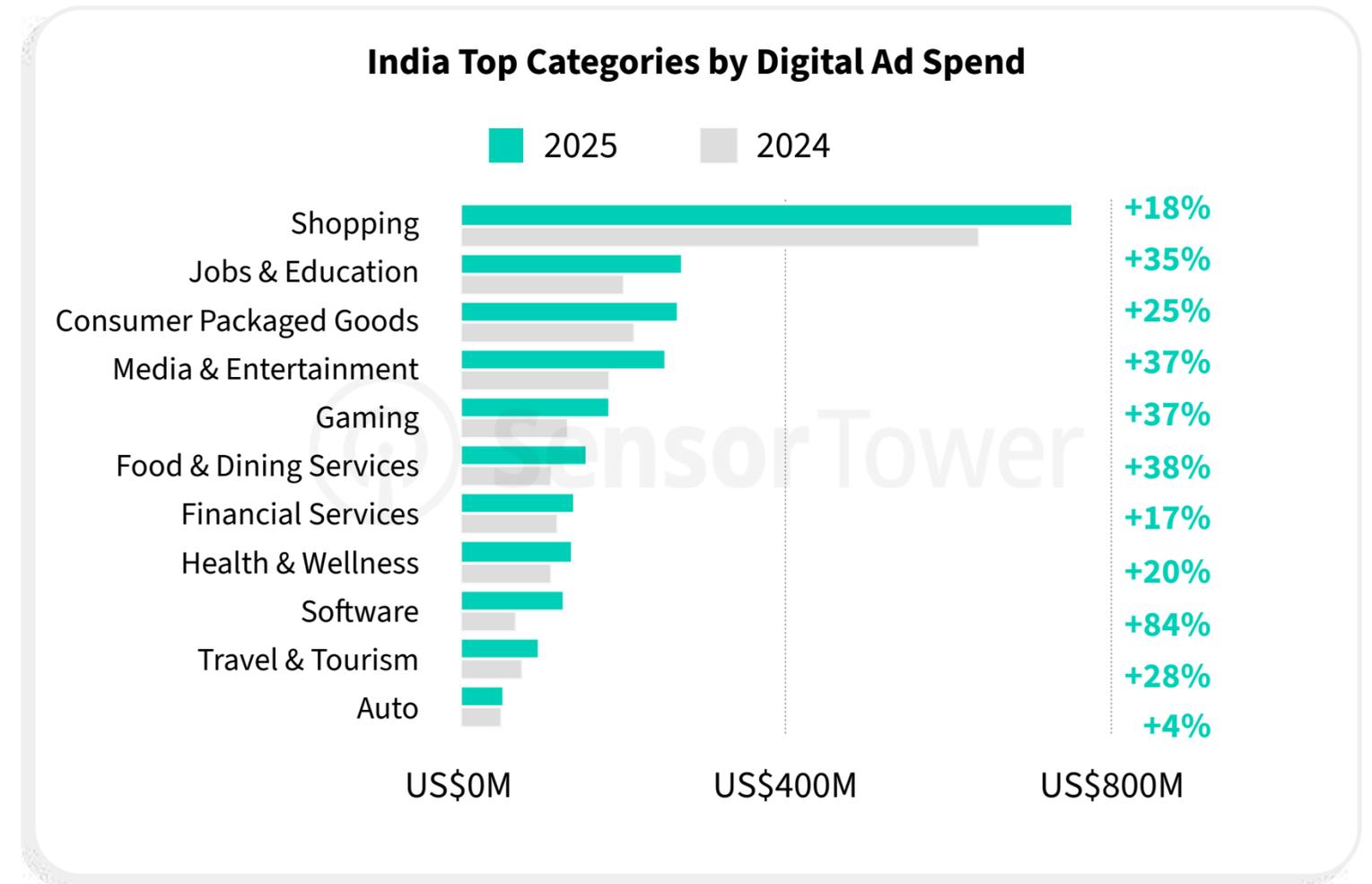
Source: Sensor Tower – Advertising Insights by Pathmatics as of Feb 3, 2026

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, Mobile Apps, and YouTube, covering the period from January to December 2025. YouTube data is available from April 2025 onward.

*YouTube is excluded from the 2025 YoY calculation.



In 2025, Shopping remained the largest category in India's digital advertising market, accounting for **28%** of total ad spend. **Jobs & Education** and **Consumer Packaged Goods (CPG)** each captured 10% of the market, jointly ranking as the second-largest spending categories. Other notable categories included **Media & Entertainment**, **Gaming**, and **Food & Dining** Services, each contributing a meaningful share to overall digital advertising spend.



While **Shopping** continued to lead all categories by total ad spend, it also recorded a solid 18% year-over-year increase. **Software** emerged as the fastest-growing category, with ad spending rising 84% YoY, followed by **Food & Dining** Services, which saw a **38% increase**. Notably, the **Automotive** category also entered the top-spending rankings and posted positive year-over-year growth, with ad spend increasing by 4%.

Leading India Advertisers by Engagement in 2025: A Local-Led Landscape

Leading e-commerce players like **Flipkart, Amazon, and Reliance** firmly occupied the top three positions among India's leading advertisers, reflecting sustained investment in digital advertising and ongoing competitive intensity within the shopping category.

Food delivery and grocery platforms—including **Blinkit, Instamart (Swiggy), and BigBasket**—also ranked among the top advertisers, reflecting the growing role of on-demand and essential services. Notably, **Instamart** rose 18 positions year over year and recorded strong gains in digital ad attention.

The top advertisers also included leaders from other retail verticals, such as CPG player **Unilever**, apparel platform **Myntra**, and beauty retailer **Nykaa**. Meanwhile, **Adobe** emerged as the leading software advertiser, entering the top 10 by impressions following strong YoY growth. Overall, 2025 reflects a competitive and increasingly diversified digital ad landscape in India.

India Top Advertisers by Impressions | FY2025

Rank By Impressions	Advertiser	Key Category	vs FY2024
1	 Flipkart	Shopping	▲ 1
2	 Amazon	Shopping	▼ 1
3	 Reliance	Shopping	=
4	 Blinkit	Food & Grocery Delivery	▲ 1
5	 Adobe Systems	Software	▲ 10
6	 Unilever	Consumer Packaged Goods	▲ 1
7	 Swiggy Limited	Food & Grocery Delivery	▲ 18
8	 Myntra	Apparel	▼ 4
9	 Nykaa	Beauty Retail	▼ 3
10	 Tata Digital	Grocery Delivery	▼ 2

Source: Sensor Tower – Advertising Insights by Pathmatics

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, Mobile Apps, and YouTube, covering the period from January to December 2025. YouTube data is available from April 2025 onward.

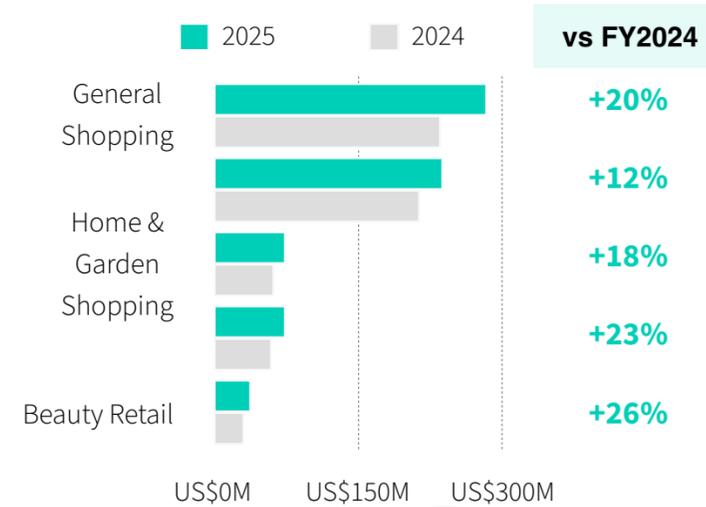
From Scale to Momentum: Subcategory Drivers Across Shopping, CPG, Financial Services and Auto

While **Shopping and CPG** remain the two largest contributors to India's digital ad spending in 2025, growth dynamics at the subcategory level highlight shifting sources of momentum. Within CPG, **Personal Care** stands out as the top-spending subcategory, driven by an increasingly competitive beauty and skincare landscape. This trend is echoed in Shopping, where **Beauty Retail** recorded a solid **26% YoY growth**, underscoring sustained advertiser investment in beauty-led demand.

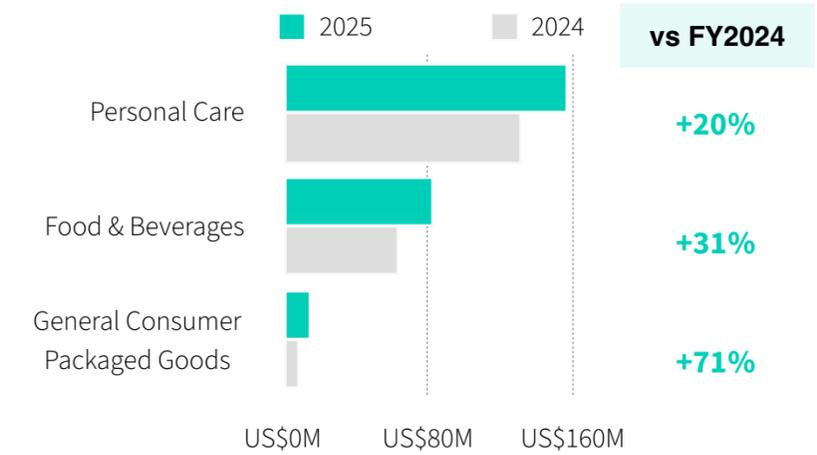
Auto has also emerged as a top-ranked category. While overall Auto spending has grown steadily, top subcategories are scaling much faster—most notably **Automotive Marketplaces & Retailers**, which posted 28% YoY growth—positioning Auto as an important source of incremental market momentum.

In Financial Services, growth is primarily driven by **Consumer Finance, Credit & Lending, and Insurance**, highlighting the growing prominence of mobile-based consumer finance services.

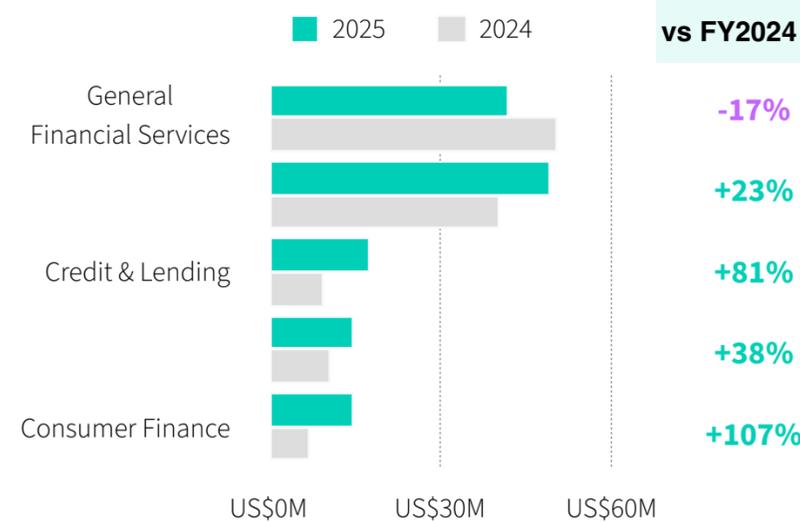
Top Subcategories by Digital Ads Spending in Shopping



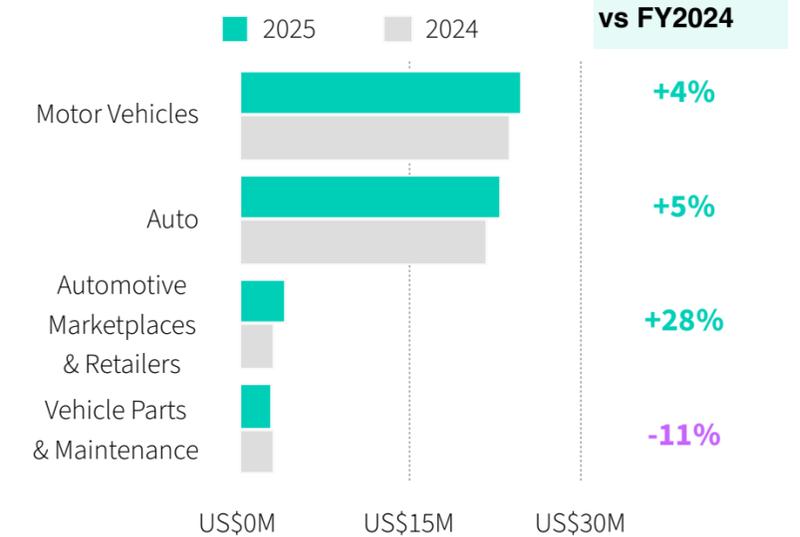
Top Subcategories by Digital Ads Spending in Consumer Packed Goods



Top Subcategories by Digital Ads Spending in Financial Services



Top Subcategories by Digital Ads Spending in Auto



Source: Sensor Tower – Advertising Insights by Pathmatics as of Feb 3, 2026

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X and Mobile Apps, covering the period from January to December 2025.



Market Trend Spotlight

India's Digital Ad Seasonality in 2025

India's Festive Season Drives Sustained Growth in Digital Ad Spending

India's digital advertising market has demonstrated strong and sustained growth, with the first noticeable peak in advertising investment emerging as early as **July**, reflecting early campaign activity ahead of the festive season in 2025. Across key consumer-facing categories—including **shopping, CPG, media, and education**—brands consistently scale up large-scale marketing campaigns during the festive season, driving a sharp increase in advertising investment.

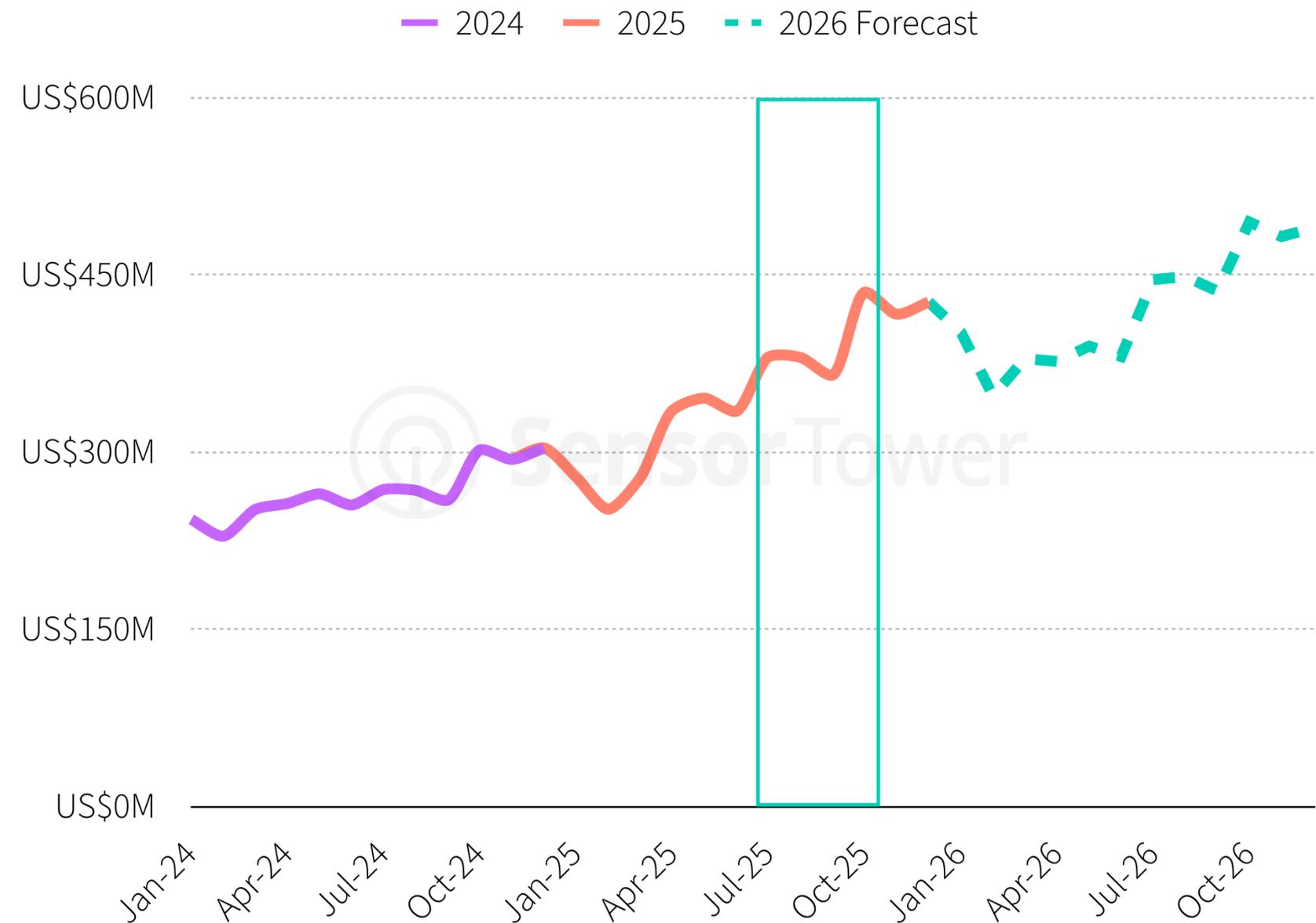
This seasonal dynamic intensified further in 2025, with digital ad spending in October surpassing **\$430 million**, underscoring the growing importance of festive-led advertising strategies.

Looking ahead to 2026, the market is expected to reach new highs, with an initial peak in July followed by a stronger surge in October, when ad spending is projected to **approach \$500 million**—signaling continued momentum and another record festive season.

Source: Sensor Tower – Advertising Insights by Pathmatics

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, and YouTube, covering the period from January to December 2025. YouTube data is available from April 2025 onward.

India Monthly Digital Ad Spend Trends and Forecast



Discover Which Subcategories Make the Biggest Push During the Festive Season

Building on this seasonal pattern, H2 performance within the **Shopping** category shows broad-based subcategory growth in 2025. **Beauty Retail** emerging as the fastest-growing at +31% period-over-period (PoP), followed by General Shopping at 27% PoP, Apparel at 23% PoP and Computers & Consumer Electronics at 20% PoP.

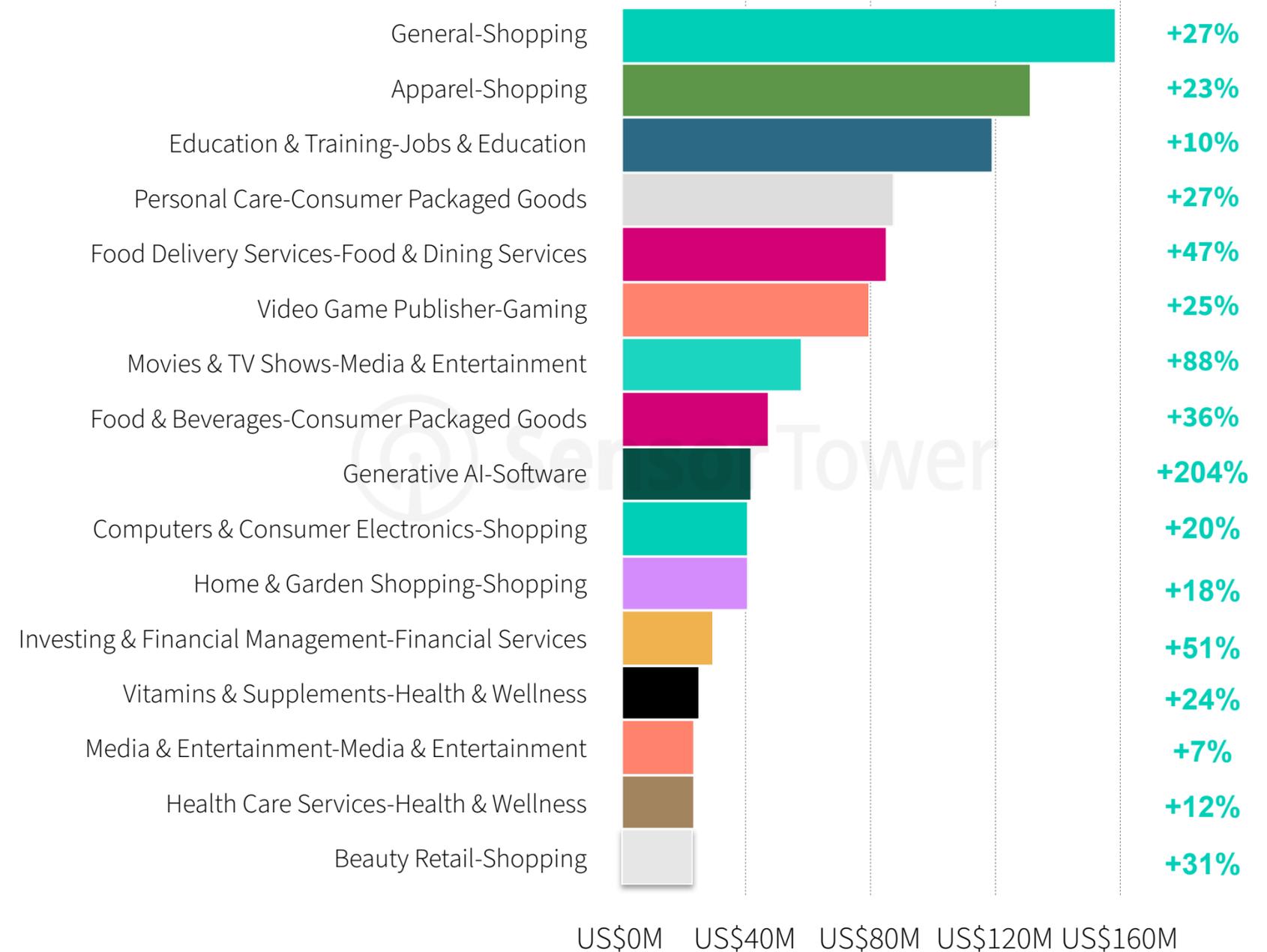
Non-Shopping categories also ramped up spend at the second half of the year, including **Generative AI** with the fastest-growing at +204% PoP, followed by **Movies & TV Shows**, **Investing** and **Food Delivery Services**. This pattern indicates that these categories concentrate digital advertising in the festive-heavy second half to capture heightened seasonal demand.

Source: Sensor Tower – Advertising Insights by Pathmatics

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, and Mobile Apps, covering the period from January to December 2025.

India Digital Ad Spend by Sub Category in H2 2025

vs H1 2025

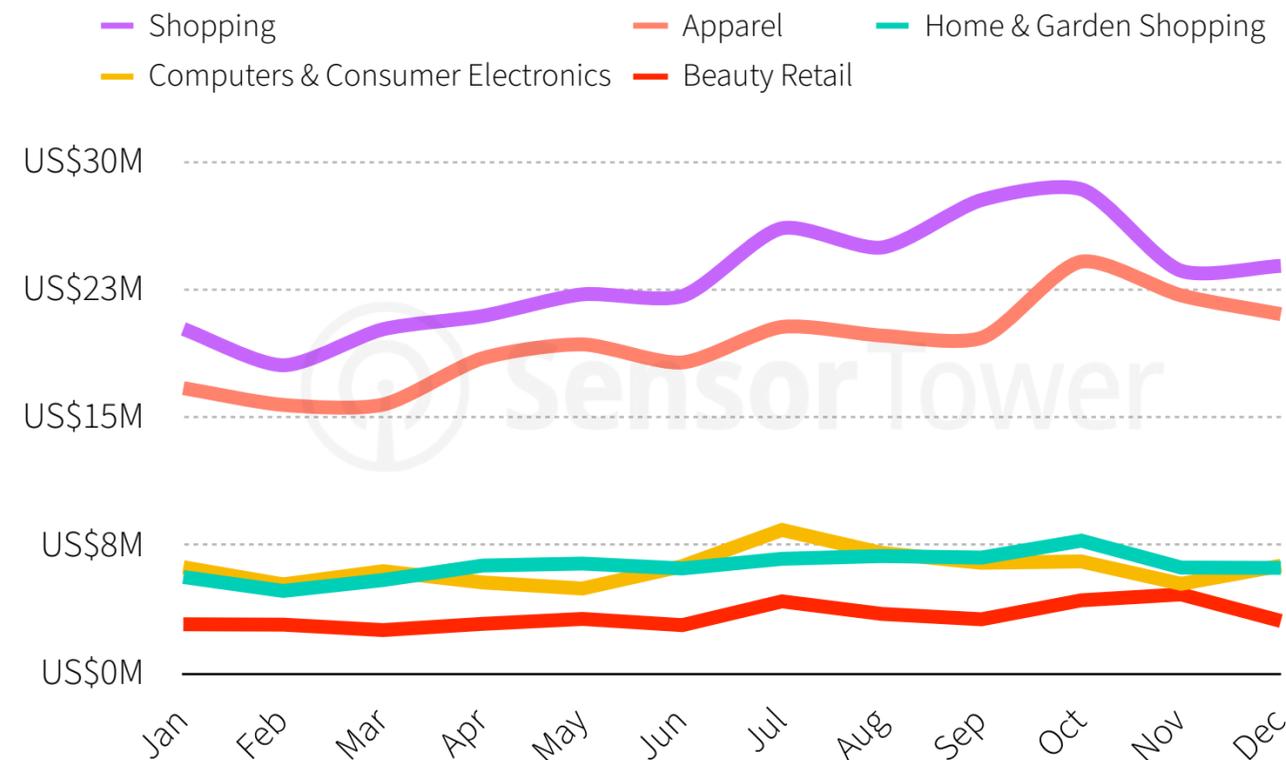


Shopping Top Subcategories Show Strong Festive Seasonality and Volatility, Led by Indian Domestic Players

Source: Sensor Tower – Advertising Insights by Pathmatics as of December 31, 2025.

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat and X, covering the period from January to December 2025.

2025 India Digital Ad Spend by Top Subcategories in Shopping



As the two largest Shopping subcategories, **General Shopping** and **Apparel** exhibit the most pronounced festive-seasonality, with clear spend acceleration and strong growth during the festive period. Together, these subcategories act as the primary growth engines of the broader Shopping category, anchoring overall performance during H2.

Top Advertisers by Impressions for Shopping Subcategories

Rank	Overall	General Shopping	Apparel	Computer & Consumer Electronics	Home&Garden Shopping	Beauty Retail
1	Flipkart	Flipkart	Myntra	Apple	Amazon	Nykaa
2	Reliance	Reliance	Titan Company	Samsung	The Sleep Company	Smytten
3	Nykaa	Meesho	Aditya Birla Fashion & Retail	Vivo	Livspace	Sephora
4	Myntra	BlueStone	SNITCH	OnePlus	Asian Paints	Amazon
5	Meesho	The Souled Store	Reliance	Reliance	IKEA	WOMAN CART

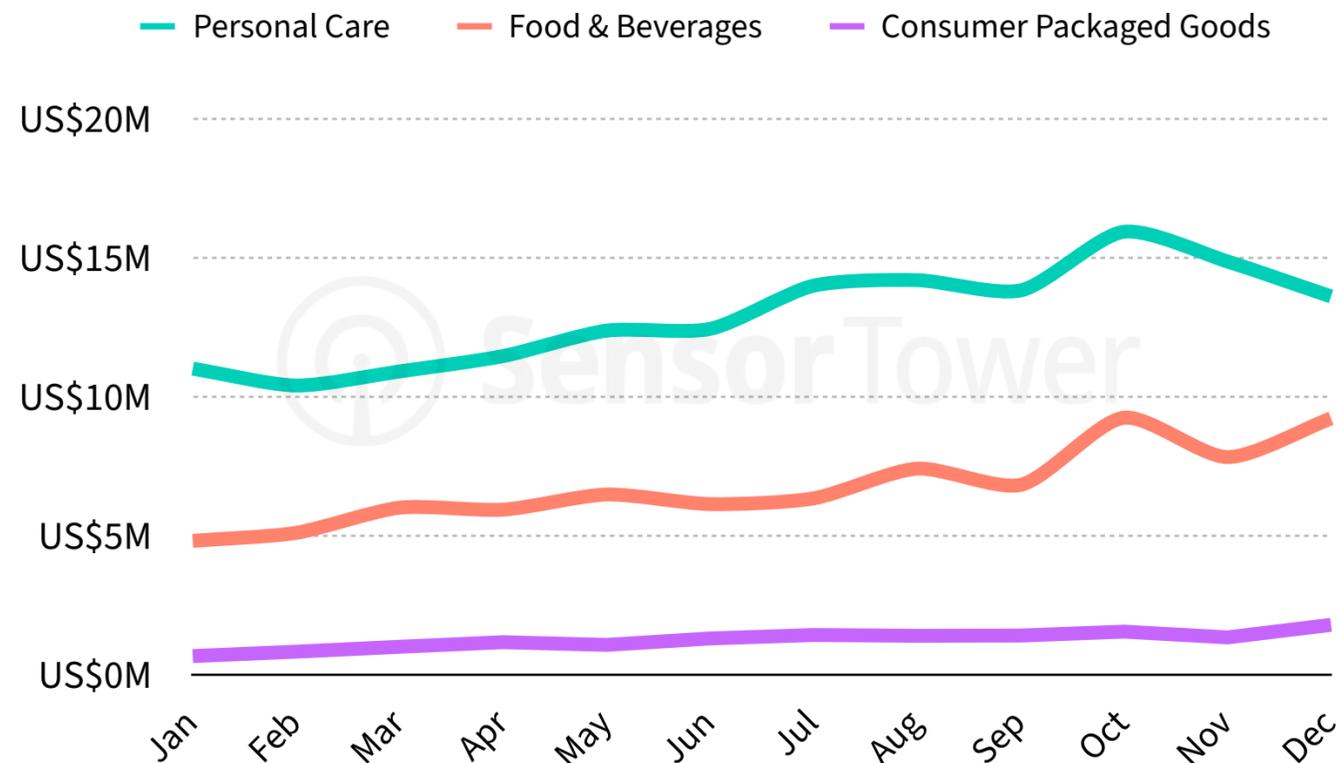
Indian domestic advertisers—such as **Flipkart, Reliance Retail, Nykaa, and Myntra**—hold leading positions across key Shopping subcategories. Among them, Reliance Retail stands out for its diversified presence, ranking among the top advertisers in General Shopping, and Apparel, highlighting its multi-category scale and breadth. **Nykaa**, meanwhile, maintains a strong leadership position within the Beauty vertical, reinforcing its strength in this fast-growing subcategory.

Consumer Packed Goods Ad Spend Maintains Steady Upward Trajectory, Culminating in October Festive Peak

Source: Sensor Tower – Advertising Insights by Pathmatics as of December 31, 2025.

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat and X, covering the period from January to December 2025.

2025 India Digital Ad Spend by Top Subcategories in CPG



India's CPG digital ad spending increased steadily through the year, reaching a festive peak in October. Personal Care dominated with nearly 60% of total spending, led by **Unilever** (16% SOV) alongside local players such as **Honasa**, **Tatvartha Health**, and **Reliance Retail** (each ~6% SOV). **Marico** showed strong momentum with nearly 70% YoY growth in impression. Food & Beverages expanded 30% YoY, led by **Mondelez** (12.5% SOV), while **ITC** followed at 6% SOV with a sharp 106% YoY surge in impressions.

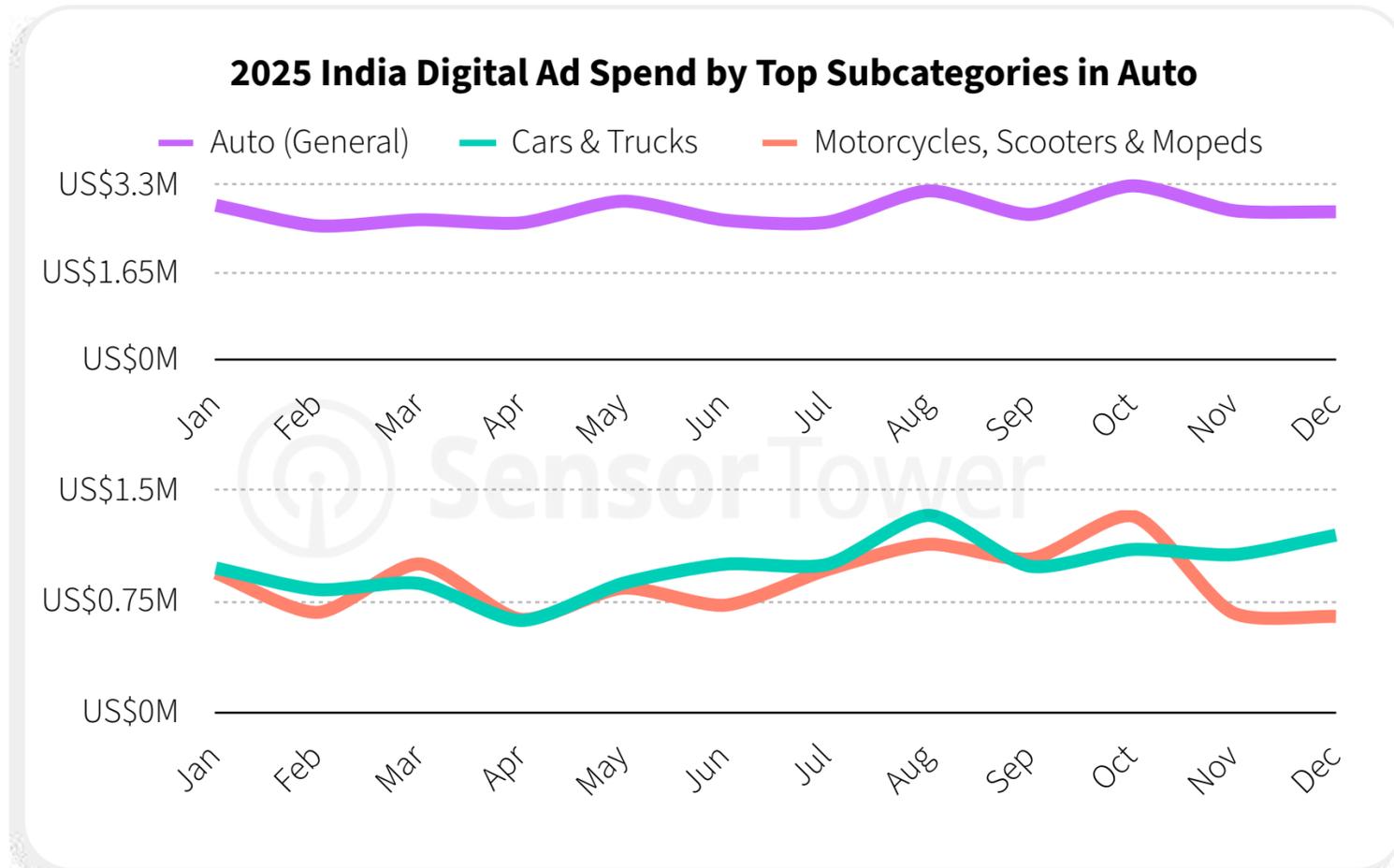
Top Advertisers by Impressions for CPG Subcategories

Rank	Overall	Personal Care	Food & Beverages	General CPG
1	Unilever	Unilever	Mondelez	Himalaya
2	Mondelez	Honasa	ITC	Bombay Shaving Co.
3	Honasa	Traya	Unilever	Beiersdorf AG
4	Reliance	Reliance	Coca-Cola	Unilever
5	Traya	L'Oreal	Tata Consumer Products	Galderma
6	Mosaic Wellness	Marico	Nestle	Reckitt Benckiser
7	Marico	Manash	Diageo	Colgate-Palmolive
8	L'Oreal	Dot & Key	Britannia	Guiltfree
9	ITC	Innovist	Farmley	Amrutam
10	Manash	RENEE	Wellversed	The Magnum

Auto Ad Spend Reflects Strong Seasonality, with Strategic Peaks in August and October Driven by Motor Vehicles

Source: Sensor Tower – Advertising Insights by Pathmatics as of December 31, 2025.

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, X, and Mobile Apps, covering the period from January to December 2025.



In 2025, digital ad spending in India’s automotive sector showed **steady month-on-month growth**, with a clear **double peak in August and October**. While overall market trends followed this pattern, timing varied by segment: Cars & Trucks (4W) peaked in August, while Two-Wheelers reached their high point in October during the festive season.

The competitive landscape continues to be led by domestic players such as **Maruti, Tata Motors, and Mahindra**, which rank highest in both Share of Voice and YoY growth. They are followed by global brands including **Hyundai, Toyota, and Honda**. In the two-wheeler segment, **Bajaj Auto and TVS Srichakra** also stand out, showing strong YoY growth in digital presence.

Top Advertisers by Absolute Impressions

Rank	Advertiser
1	Maruti Suzuki India
2	Tata Motors
3	Mahindra
4	Eicher Motors
5	Hyundai
6	TVS Motor Company
7	Toyota
8	Honda
9	Volkswagen Group
10	Jaguar Land Rover

Top Advertisers by Impressions Growth YoY Growth

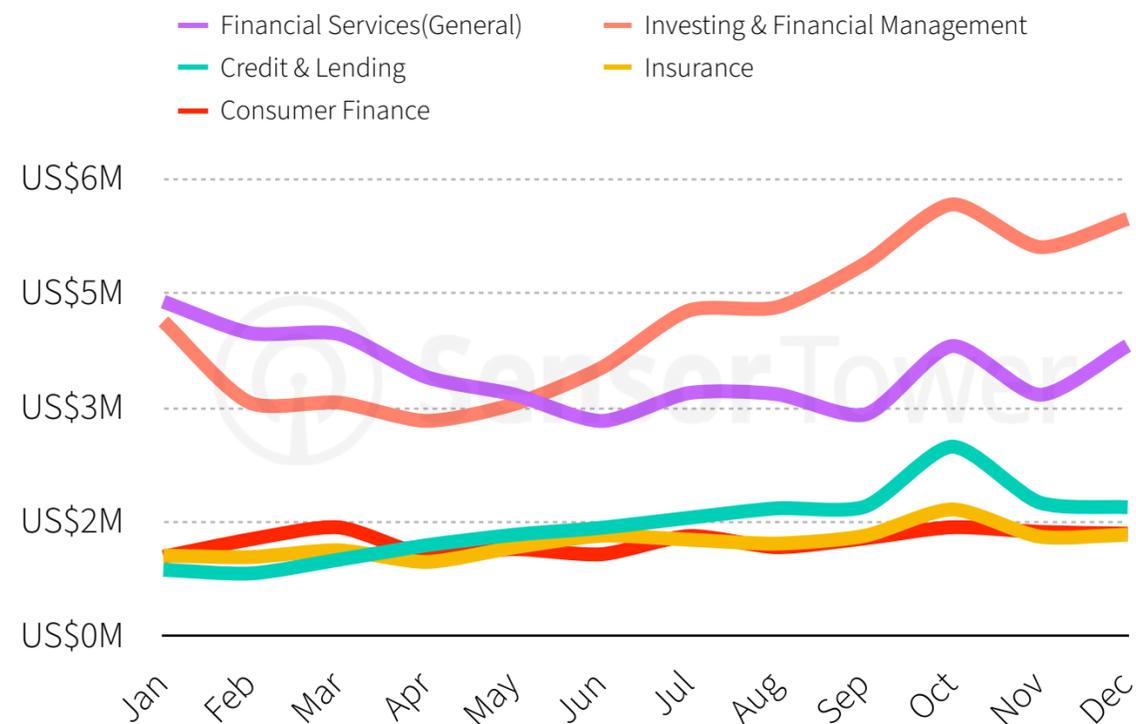
Rank	Advertiser
1	Maruti Suzuki India
2	Tata Motors
3	Honda
4	Eicher Motors
5	Jaguar Dealer Association
6	Bajaj Auto
7	Harley Davidson
8	Ford
9	Renault
10	TVS Srichakra

Financial Services Ad Spend Peaks in Q4, Led by a Strategic Surge in Investing & Financial Management

Source: Sensor Tower – Advertising Insights by Pathmatics as of December 31, 2025.

Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat and X, covering the period from January to December 2025.

2025 India Digital Ad Spend by Top Subcategories in CPG



Ad spending of the Financial Services sector **peaked in October**, fueled by explosive YoY spending growth in Consumer Finance (+107%), Credit & Lending (+81%), and Insurance (+38%). While local giants like **SBI, ICICI, and Kotak** lead the rankings, the prominence of **Binance** highlights a shifting competitive landscape. **ICICI's** Top 5 presence across both Investing and General Finance reflects its broad-based digital footprint. Meanwhile, **Wint Wealth** emerged as a strong new entrant in 2025, securing positions among the top advertisers.

Top Advertisers by Impressions for CPG Subcategories

Rank	Overall	General Financial Services	Investing & Finance	Credit & Lending	Insurance	Consumer Finance
1	Binance	State Bank of India	Binance	Scapia	Star Health	Kotak Mahindra
2	State Bank of India	Exness	Raise	Slice	State Bank of India	IDFC FIRST Bank
3	ICICI Group	Bajaj Finserv	ICICI	Uniorbit	Axis Max Life Insurance	NPCI
4	Kotak Mahindra	ICICI	Delta Exchange	Arthvit	Tata Capital	POPtch
5	Raise	Axis Max Group	Groww	State Bank of India	ACKO	Scotiabank
6	Exness Group	Paytm	Funding Pips	TransUnion	Religare Health Insurance	Eresolution
7	Bajaj Finserv	Axis Bank	INDmoney	Finnovator	Ditto	Sorare SAS
8	Delta Exchange	PolicyBazaar	Kotak Mahindra	Shriram	Life Insurance	BharatPe
9	Groww	Visa	CoinDCX	FPL	HDFC	InCred Money
10	Star Health	Smartex International	Wint Wealth	Grant Thornton	Bajaj Allianz	Cashfree

Case Study

India Digital Advertising in Focus





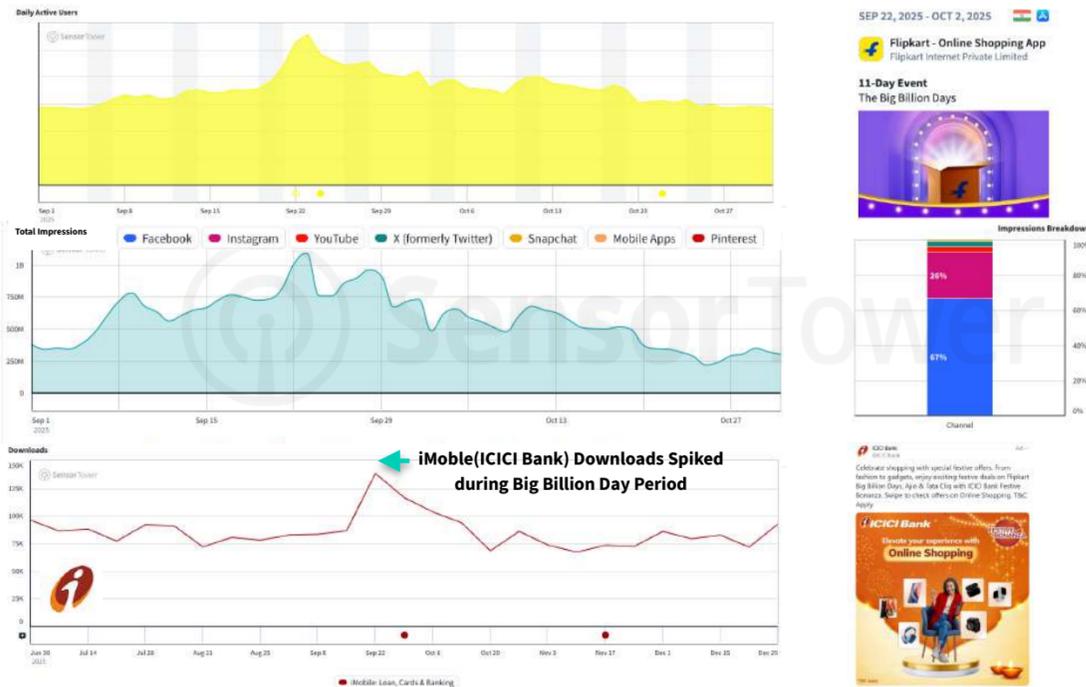
Flipkart: Driving Festive-Season Impact with Story-Led Creatives and Bank Partnerships

Data Source: Sensor Tower App Performance Insights as of December 31, 2025.

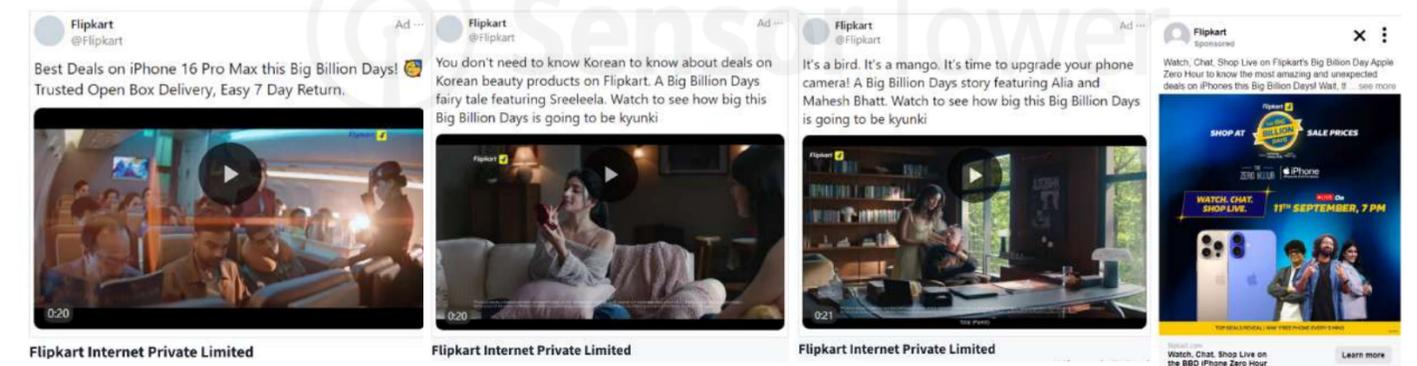
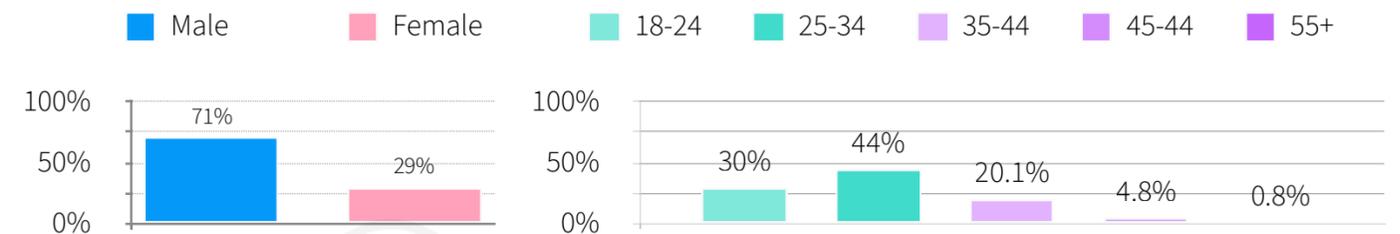
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China.

Ahead of Diwali, major shopping festivals led by **Flipkart's Big Billion Day** drove sharp spikes in digital advertising activity. In September, impressions rose 50% PoP alongside a 31% lift in WAU, marking the strongest engagement levels of the year. Beyond deal-led messaging, Flipkart positioned the festival as a cultural moment, combining **story-driven, celebrity-led creatives with bank-partnered discount offers** to amplify engagement and conversions.

Flipkart DAU and Ad Impressions in September 2025 (Big Billion Day Period)



Audience Demographics & Creative Gallery for Flipkart India



In 2025, Flipkart kicked off its festive ad push in early September, **peaking** on September 23. Daily impressions neared **1.1B** that day, alongside a DAU high. During Big Billion Day, **ICICI Bank's iMobile** app also saw downloads peak, pointing to a mutually reinforcing dynamic between e-commerce promotions and banking partners.

Flipkart's audience **skews young**, with 77% under 34 and a relatively higher female share at 30%. In 2025, the brand centered its campaign on "*Yahaan Kuch Bhi Ho Sakta Hai*" ("Anything can happen here"), featuring local celebrities and influencers to tell **story-led** tales. Combined with low-price and no-cost EMI messaging, Flipkart reinforced an image that blends affordability, style, and warmth.



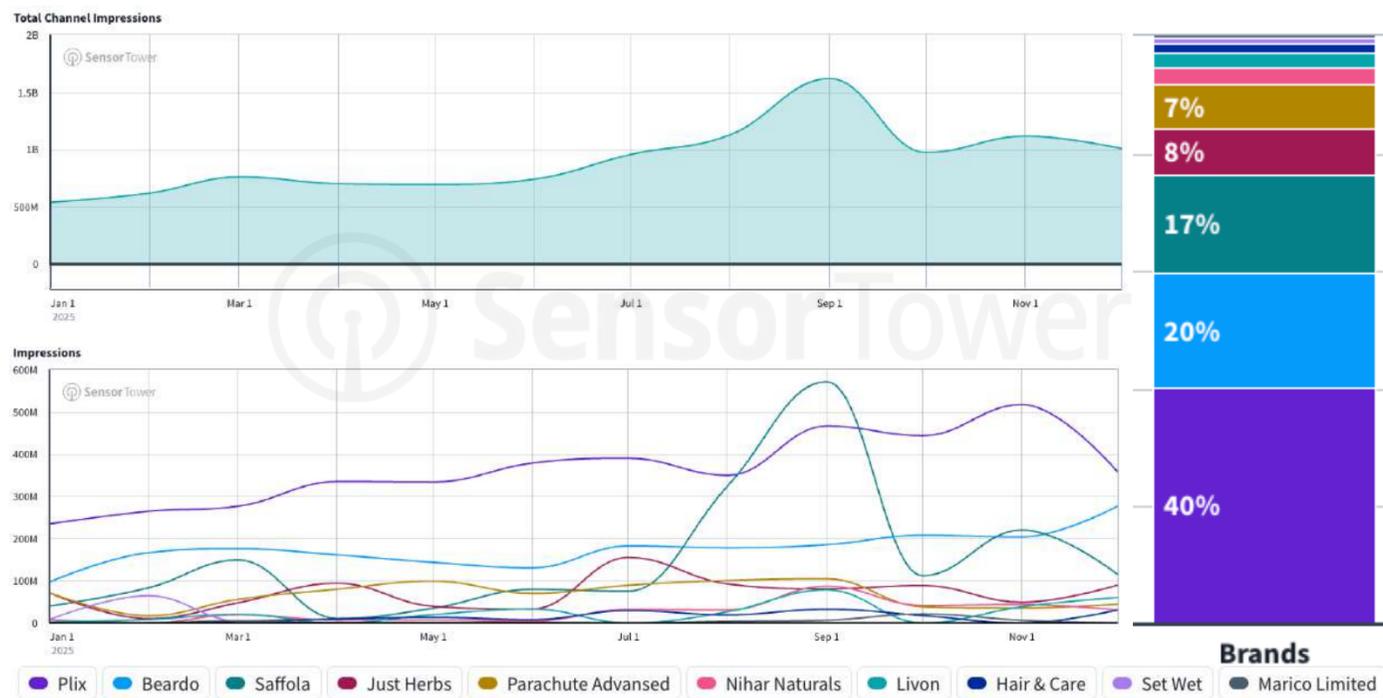
Marico: Scaled Growth Through Portfolio Rebalancing

Source: Sensor Tower – Advertising Insights by Pathmatics as of December 31, 2025.

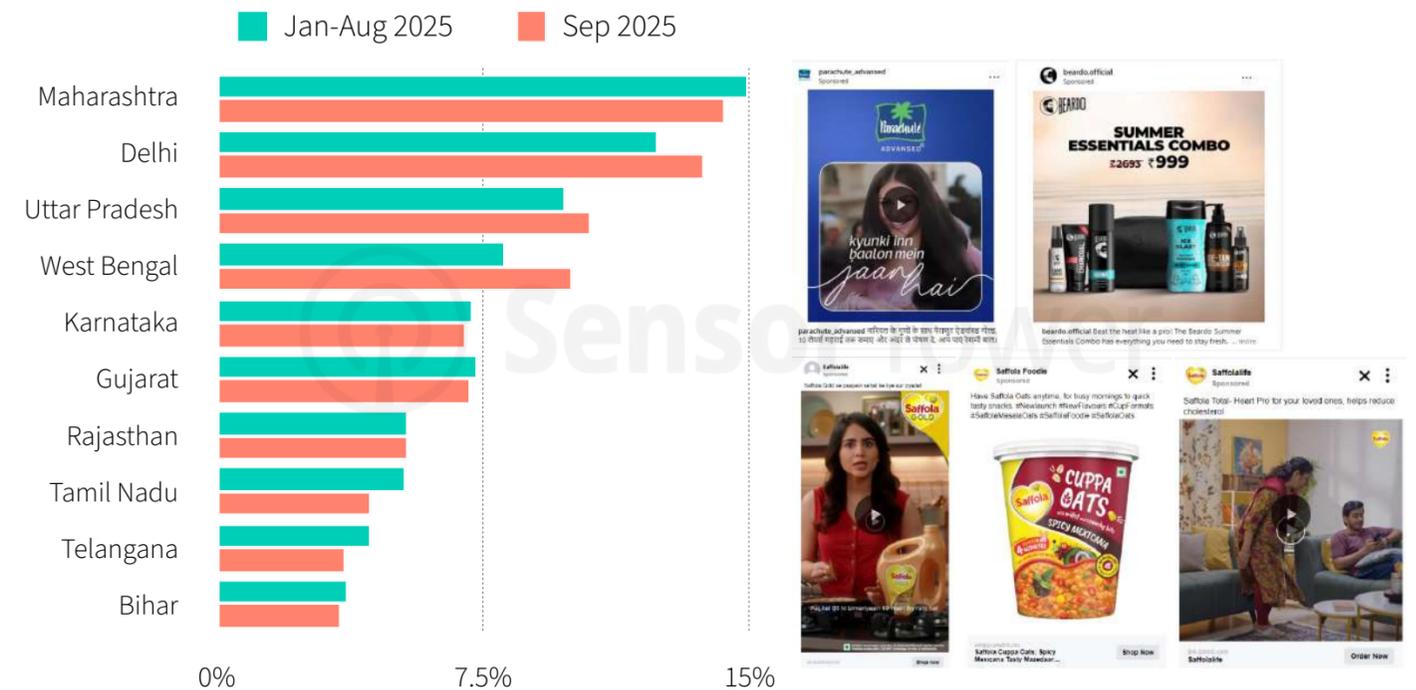
Note: This report includes data from Facebook, Instagram, LinkedIn, Pinterest, Reddit, Snapchat and X, covering the period from January to December 2025.

In 2025, Marico’s digital ad impressions increased **87%** YoY, in line with higher digital ad spend. Saffola accounted for 29% of incremental impressions, followed by FPLiX (21%) and Beardo (19%). This accelerated investment lifted **Saffola’s SOV from 6% to 17%**, signaling a clear pivot toward health-led categories.

Marico Limited Digital Ad Spend & Brands Breakdown in 2025



Geography Breakdown & Creative Gallery for Marico Limited India



Marico’s digital ad impression peaked in **September**, making it the most important month of the year. This surge was largely fueled by a sharp increase in **Saffola’s digital ad investment**, positioning the brand ahead of the festive season.

Comparing Jan–Aug with September, Marico **rebalanced its geographic mix**—expanding reach across high-population North Indian states while maintaining efficient presence in core metros. Creatively, leadership shifted from Parachute’s evergreen and seasonal messaging to **Saffola-led health narratives**, highlighting healthy edible oils, convenient foods, and family wellbeing.

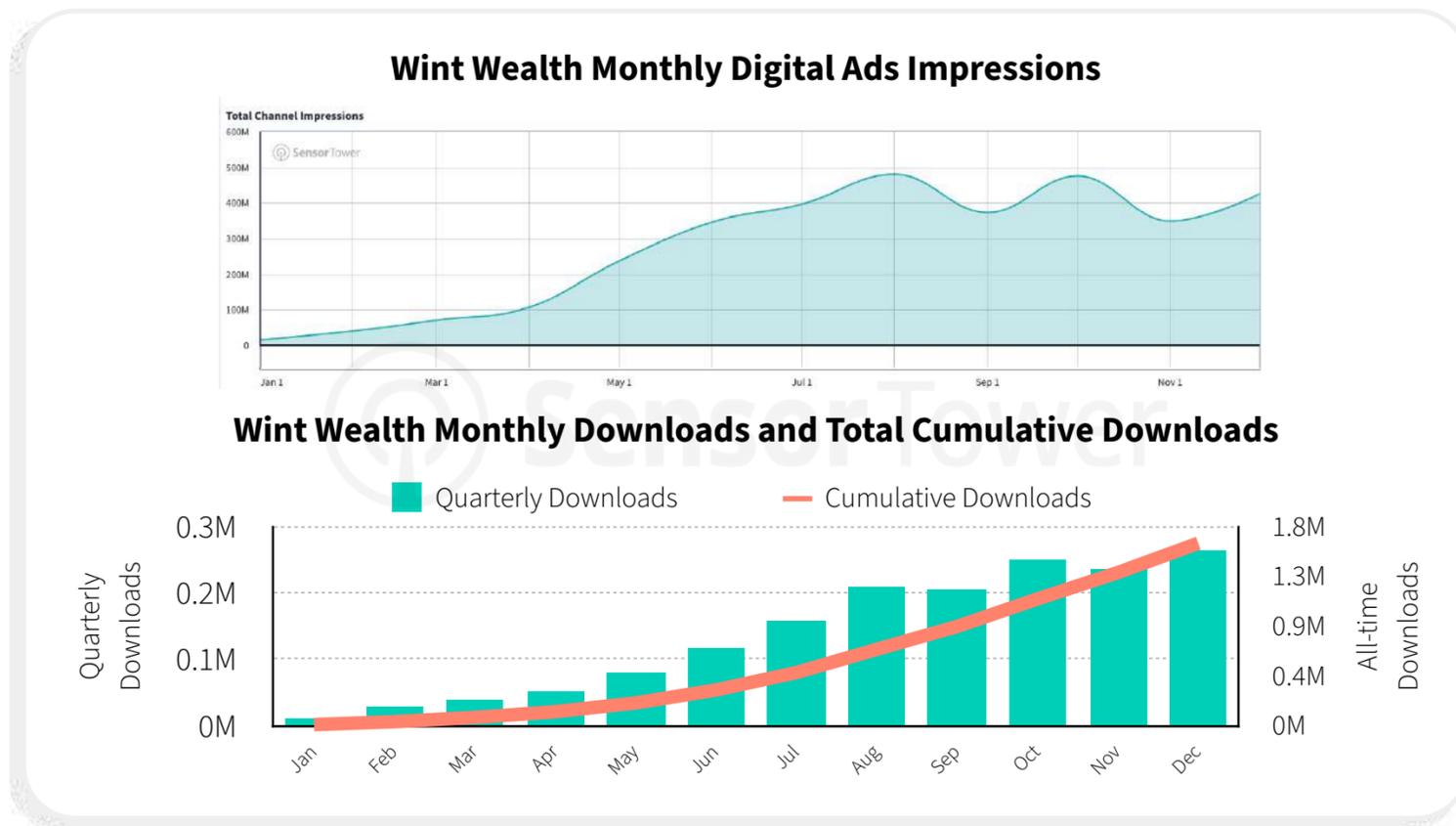


Wint Wealth: Driving Exponential Growth with Strategic Digital Scaling

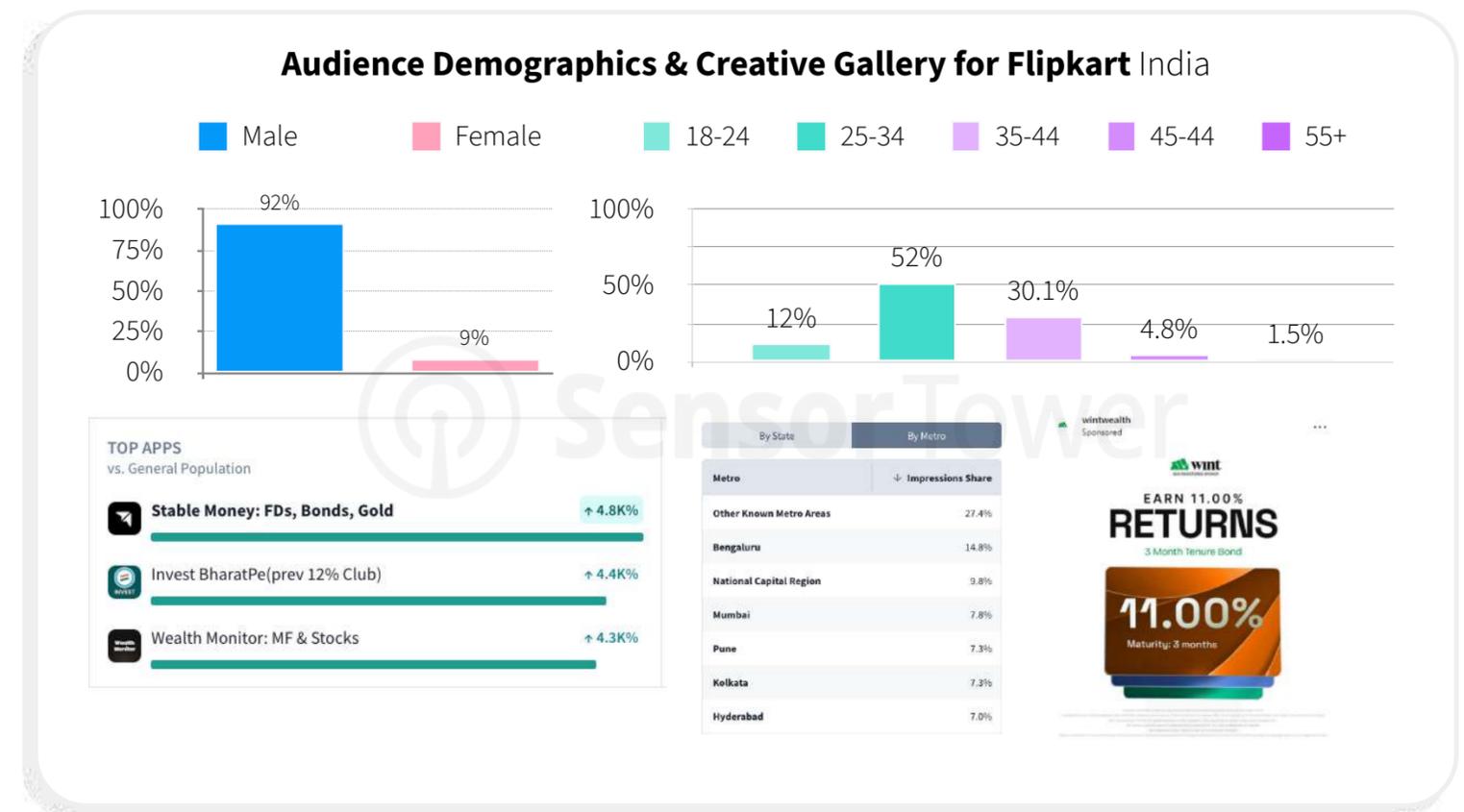
Data Source: Sensor Tower App Performance Insights as of December 31, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China.

Wint Wealth has emerged as a disruptive force in the Indian fintech landscape, leveraging a high-impact digital strategy to democratize fixed-income investments. By bridging the gap between traditional FDs and volatile equity, the platform has successfully established itself as a go-to destination for yield-focused retail investors.



The year 2025 marked a watershed moment for the platform, as a massive surge in digital ad impressions fueled an unprecedented explosion in user acquisition. Cumulative downloads soared to nearly **1.8 million**, representing a staggering **YoY growth of over 4,700%**, a direct result of Wint Wealth's aggressive and synchronized digital marketing offensive.



The platform attracts a young, **92% male** audience (70% under age 34) concentrated in **top metros like Bengaluru and NCR** who favor stable investment apps like FDs and bonds. To convert this group, creatives strategically highlight bold **"11% returns"** and **short-term tenures**, successfully capturing the demand for high-yield, liquid assets.

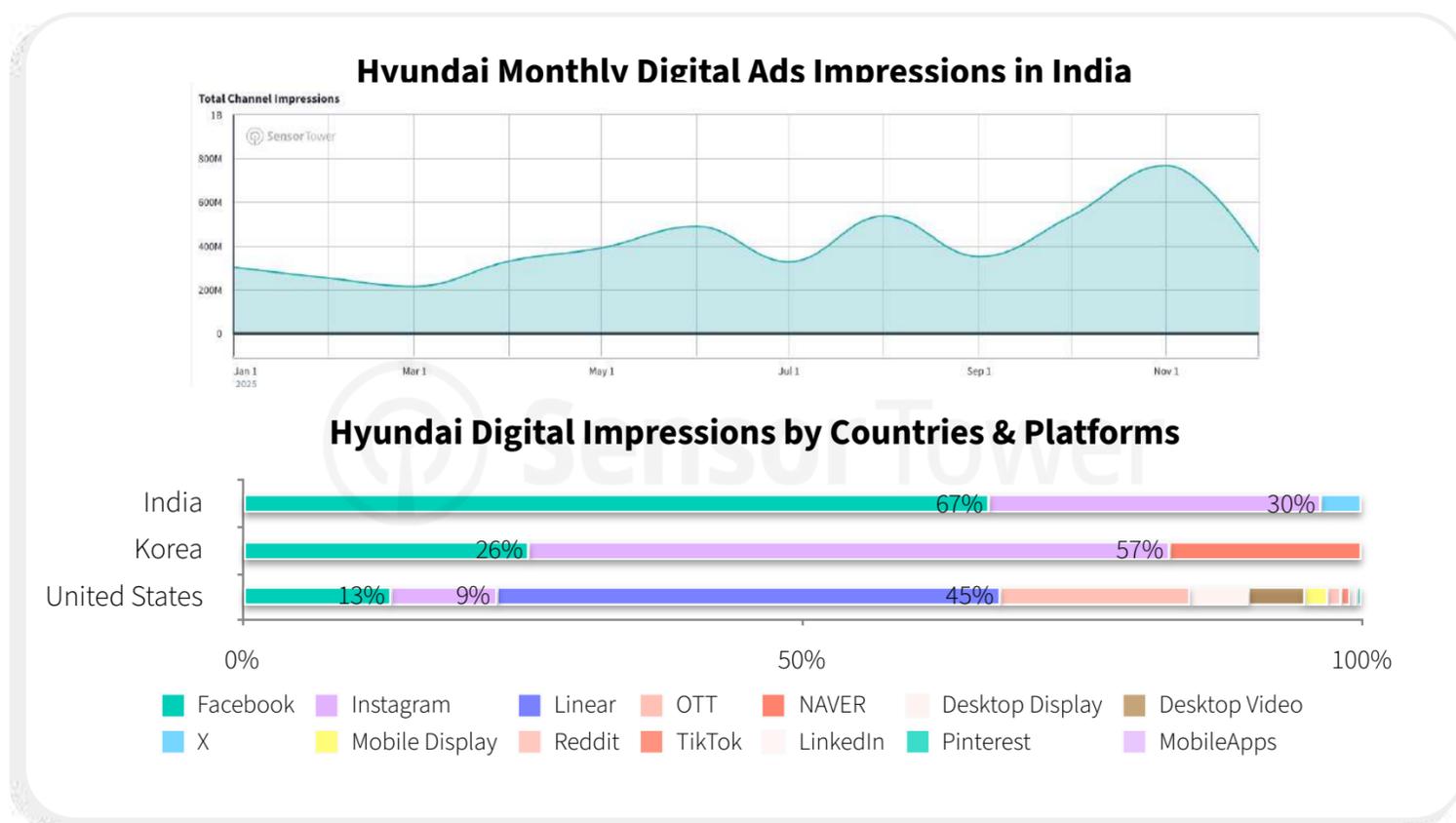


Festive Peaks and Regional Focus Lift Hyundai's Digital Visibility in 2025

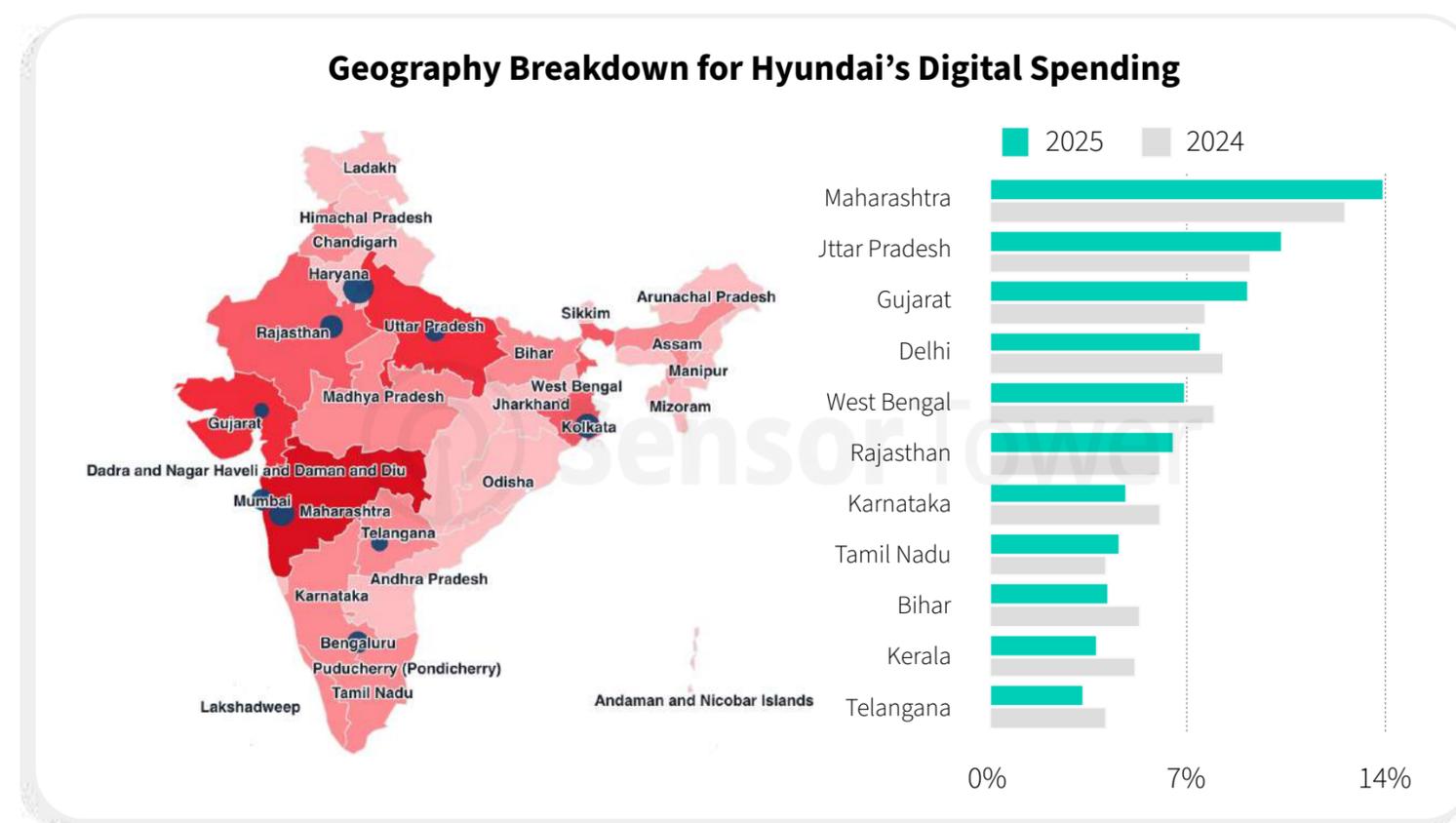
Data Source: Sensor Tower App Performance Insights as of December 31, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Pathmatics channel coverage varies across the U.S., South Korea, and India.

In 2025, Hyundai strengthened its digital presence in India through higher impression volumes and a more targeted regional allocation, leveraging a Facebook-led channel mix and concentrating exposure in high-intent northern and northwestern markets while maintaining national reach.



In India, Hyundai increased its digital visibility in 2025, moving up one position to **rank 5th** by impressions in the Auto category, with annual **impressions approaching 5B** and clear seasonality, **peaking** in November during the year-end **festive period**. Nearly 70% of impressions were delivered via Facebook, followed by Instagram, while Hyundai's channel mix varies across other key markets, reflecting **localized strategies**.



In 2025, Hyundai's digital advertising became more geographically concentrated, with a greater share of spend allocated to **North and Northwest India** compared with 2024. States such as **Maharashtra, Uttar Pradesh, and Gujarat** accounted for over 30% of total impressions. The shift reflects Hyundai's move toward more targeted regional allocation, prioritizing **high-intent markets** and core audiences while maintaining broad national visibility.

Conclusion

1

Diverse Categories Power Growth in India's Digital Ad Market

India's digital ad spend continued to grow in 2025 and is projected to reach a new peak in 2026. Shopping remained the largest category by ad spend, followed by Jobs & Education, Consumer Packaged Goods, and Media & Entertainment, each holding meaningful shares. At the advertiser level, domestic players occupied most top-ranking positions, while rankings continued to shift over time, indicating a more dynamic digital ad landscape.

2

Seasonality Shapes India's Digital Ad Spend Patterns

India's digital ad spend in 2025 followed a clear seasonal pattern, with investment ramping up from July and peaking during the festive-heavy Q4. During this period, advertisers across categories stepped up spending to capture consumer attention. While Shopping led in absolute spend, growth momentum extended beyond e-commerce, with Generative AI, Food Delivery, Movies, and Investing Services recording sharp increases in the second half of the year.

3

Festive Advertising Drives Engagement Surges

Ahead of Diwali, Flipkart's Big Billion Day drove peak engagement in September 2025, with impressions up 50% PoP and WAU rising 31%. Flipkart paired story-led creatives aligned with audience preferences with bank-partnered discounts, while Hyundai shifted festive advertising toward North and Northwest audiences, helping lift overall visibility during the festive season.

4

Audience Mix Shapes Creative Focus

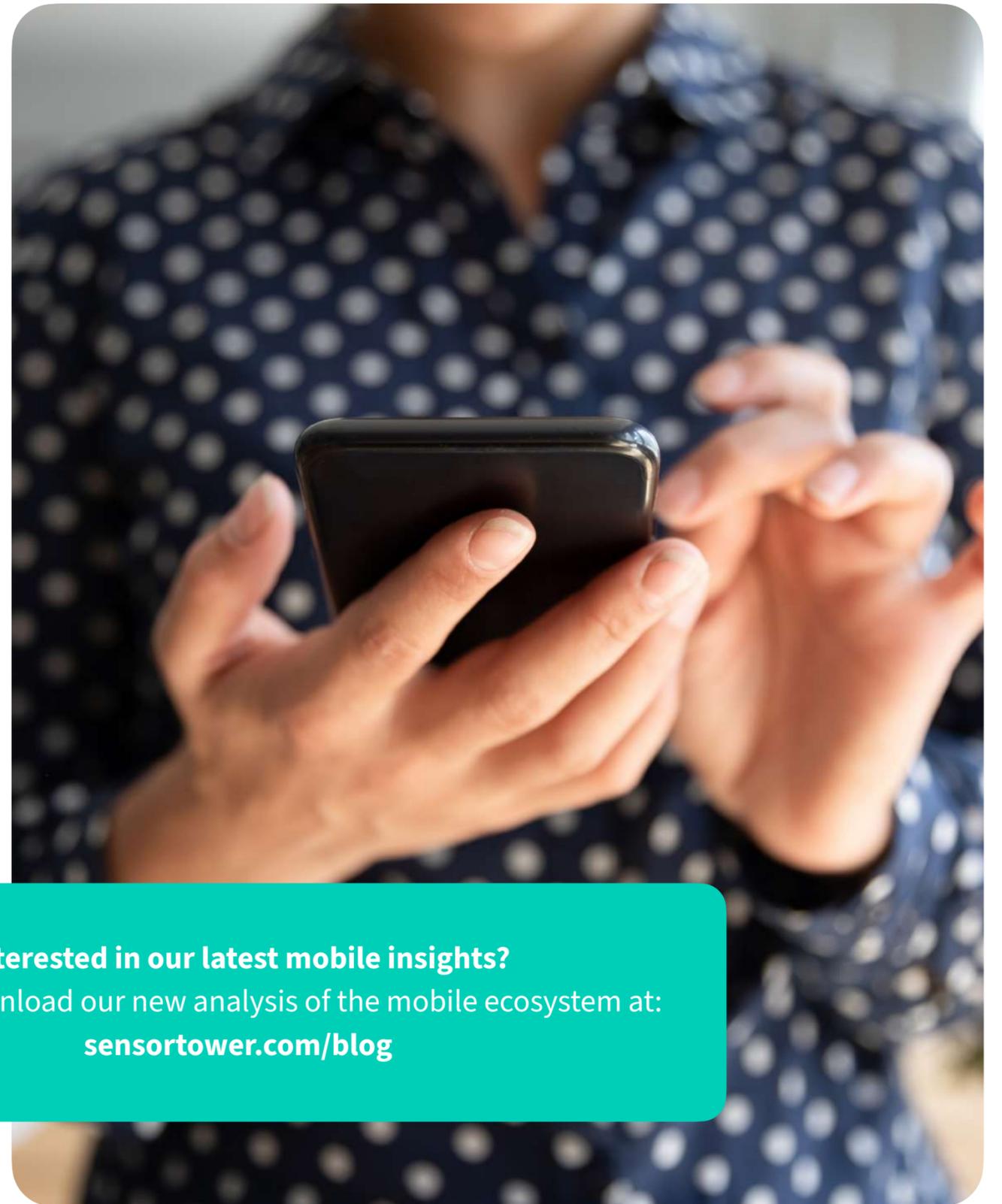
Advertisers are increasingly aligning creative approaches with audience composition. Marico strengthened its presence in North India by shifting from brand-led messaging to family- and health-focused narratives, while Wint Wealth targeted young, urban males with performance-led creatives emphasizing high-yield and short-tenure claims. Together, these examples highlight the growing importance of tailoring creative direction to specific audience segments.

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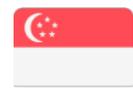
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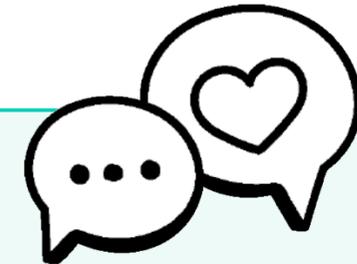
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