



# FESTIVE SEASON

MOBILE APP REPORT 2022

## AN APP MARKETER'S GUIDE TO THE INDIAN FESTIVE SHOPPER 2022

Ask an Indian what they most look forward to in a year and the answer you're most likely to get is the name of a festival.

The second half of the year, the Indian festive season, is a time of festivity, togetherness and excitement. It is the richest period of opportunity for both consumers and brands. Being the diverse and multicultural country that India is, this time stirs up activity in each region with various festivals, starting from August with Ganesh Chaturthi and Onam, moving to Dussehra, Navratri and Diwali, and going all the way until December, with Christmas and New Year's Eve. This opens a plethora of avenues for creating meaningful connections – both online and offline.

[Nielsen's Bharat 2.0 internet study](#) released earlier this year talks about the massive increase in Indian internet users which has been powered by mobile phones in the country, primarily driven by the availability of budget smartphones, affordable mobile data and the Indian government's efforts to strengthen the existing digital infrastructure. India is the third largest smartphone market in the world today, with about 250 million active users.

Indians are spending more time on mobile every day than most other countries, taking it up to the #5 spot globally (behind Brazil, Indonesia, South Korea, Mexico), with more than 4.7 hours being spent per day on mobile apps in 2021 - up 27% from 2019. (Source - Data.ai)

For decades, brands and consumers had found ways to understand and connect with each other, with consumers getting what they want and brands achieving their business goals, seamlessly. However, after the pandemic, needs and behaviour changed drastically, the effects of which are seen even today. People now have an increased dependence on online shopping, entertainment and mobile payments. For instance, there is an emergence of "First-time customers" who never ordered food online before the pandemic, but now frequently opt for delivery or takeaway. With working from home on the rise and more people avoiding public venues and commuting, more people shop online.

Consumers are thus not just adopting digital platforms. Rather, these platforms have become an integral part of their daily lives, giving rise to new patterns in decision-making and purchase.

Understanding these patterns and strategically designing the right in-app journey will go a long way towards helping businesses reach their goals as well as the hearts of customers – making the festive season celebratory for both brands and buyers.



# Top Performing App Categories



Ranking based on # of iOS & Google Play downloads in India

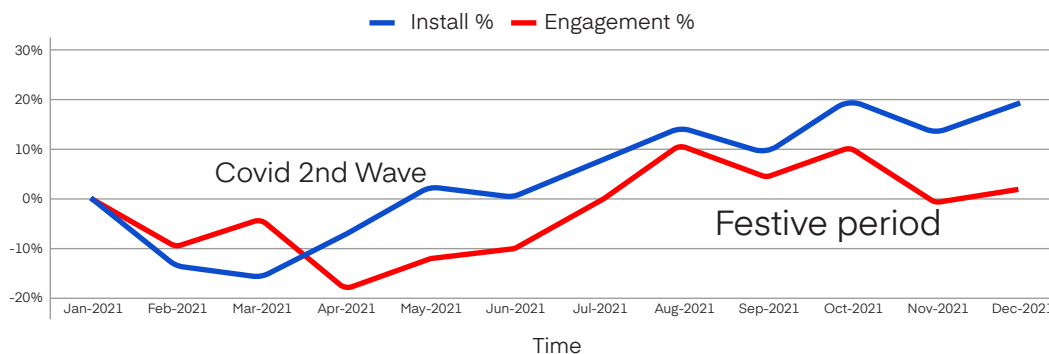
People are geared for this year's festive season in India, all set to celebrate after two years of staying home and having virtual gatherings. Consumer behaviour has evolved from pre-pandemic especially in areas like Shopping, Finance, Travel, Food & Drink which are seeing a resurgence year on year. As people plan their discretionary spending and online behaviour has become second nature for consumers - so it is imperative for brands to start thinking digital first much more than before.

As consumers are embracing near normal activities some behaviours like streaming & music, social, productivity, and gaming apps will still stay relevant this year too, as it has become second nature to them. In 2021, Gaming was the undisputed leader with close to 4.35 Billion app downloads. Social media apps witnessed a 50% lift in engagement, with people using them to wish one another and experience togetherness even when apart\*.

Sports can be a potential category which could see growth in 2022, especially with the T20 world cup matches lined up in Oct-Nov 2022.

\*Source: InMobi 2021 Festive Season Guide for App Marketers

# Mobile Apps trends higher during festivals, engagement lags



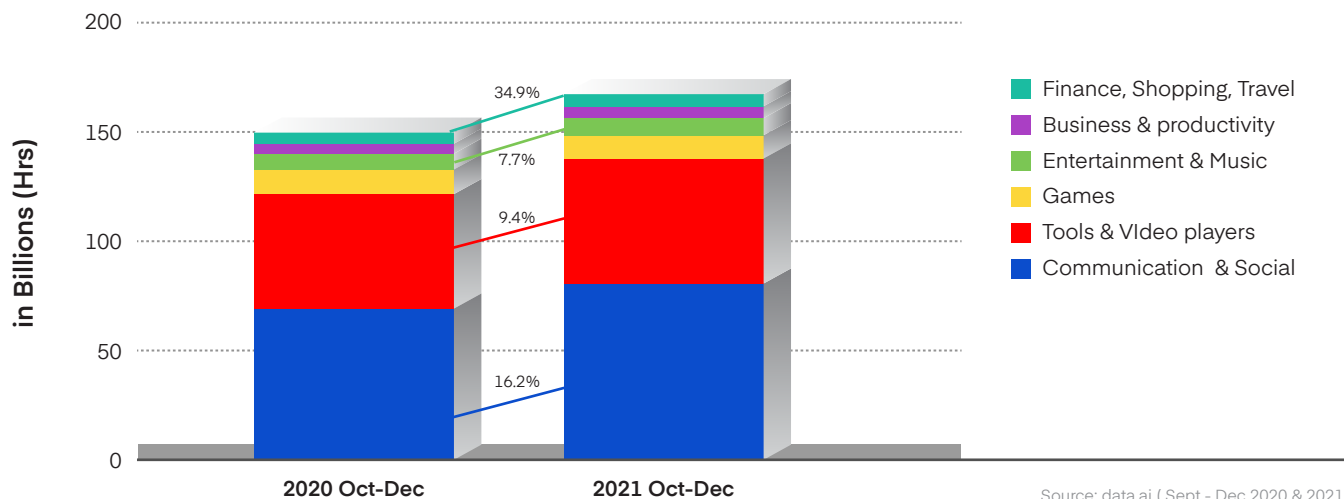
Source: Branch

In 2021, similar to our [2020 report](#), the festive season in India witnessed an increase in app installs especially in the months of August and November; however, engagement does not show the same momentum. With Indians looking to travel, shop and meet up with friends and families this year, their interaction with mobile apps will change. Marketers will need to focus on how to drive more engagement with their new and existing users in 2022, going beyond app acquisition efforts only.

## Time spent increases year on year



### Time spent on Mobile in India



Source: data.ai ( Sept - Dec 2020 & 2021 - # of hrs spent on Android phones )

Time spent on mobile in 2021 saw an increase of 27% from pre-pandemic levels in 2019. Indians are engaging deeper in Social and communication apps, and a significant increase was seen in finance, shopping and travel apps which saw a massive growth of 34% from 2020 as consumers continued the habit of online research and purchase as they embrace normal life.

More and more people in India are watching online videos (YouTube/OTT) and music streaming which led to a growth of 7.7% year on year in Entertainment & Music apps.

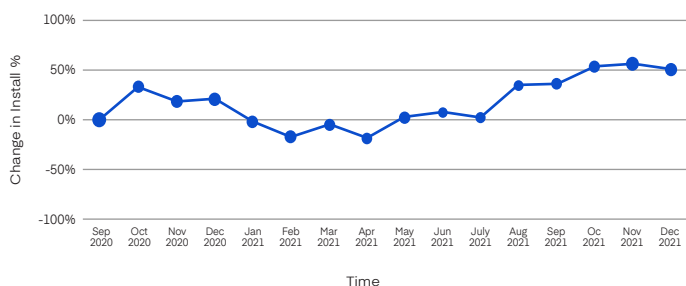


# SPOTLIGHT: CATEGORY WISE TRENDS



## Entertainment, Streaming & Music apps

### App Install and Engagement Trends



Source: Branch

Entertainment  
& OTT apps  
**30% ↑**  
in engagement  
(2021)

Music apps  
**14% ↑**  
in engagement  
(2021)

Source: InMobi 2021 Festive Season Guide for App Marketers

Entertainment apps will continue to be the primary battleground for consumer attention. Whether it's OTT apps vying for subscription dominance or music streaming apps taking over mindshare to seamlessly becoming a part of the celebrations - this category has seen installs a lot higher than other categories pretty consistently across the year, especially with the onset of local content creators which is driving OTT reach in both urban and rural India.

A seamless viewing experience across multiple devices and platforms is a must-have for OTT platform owners who want to build a sustainable following and audience base.

The festive season offers an opportunity for marketers in this category to boost their engagement with in-app and social referrals as well as focusing on a seamless customer experience within their apps.



## Shopping

### The different stages of the buying journey against the festive timeline

The festivity may be seasonal, but the shopping is perennial.

Indian shoppers are almost always planning their purchases, looking for products and great deals, throughout the year. This search gets more intense during the festivities – with the purchase patterns peaking during festive sale periods.



Source: Inmobi Festive Season Consumer Survey, India, 2021  
Q. When do you expect to start planning your festive season shopping for this year?

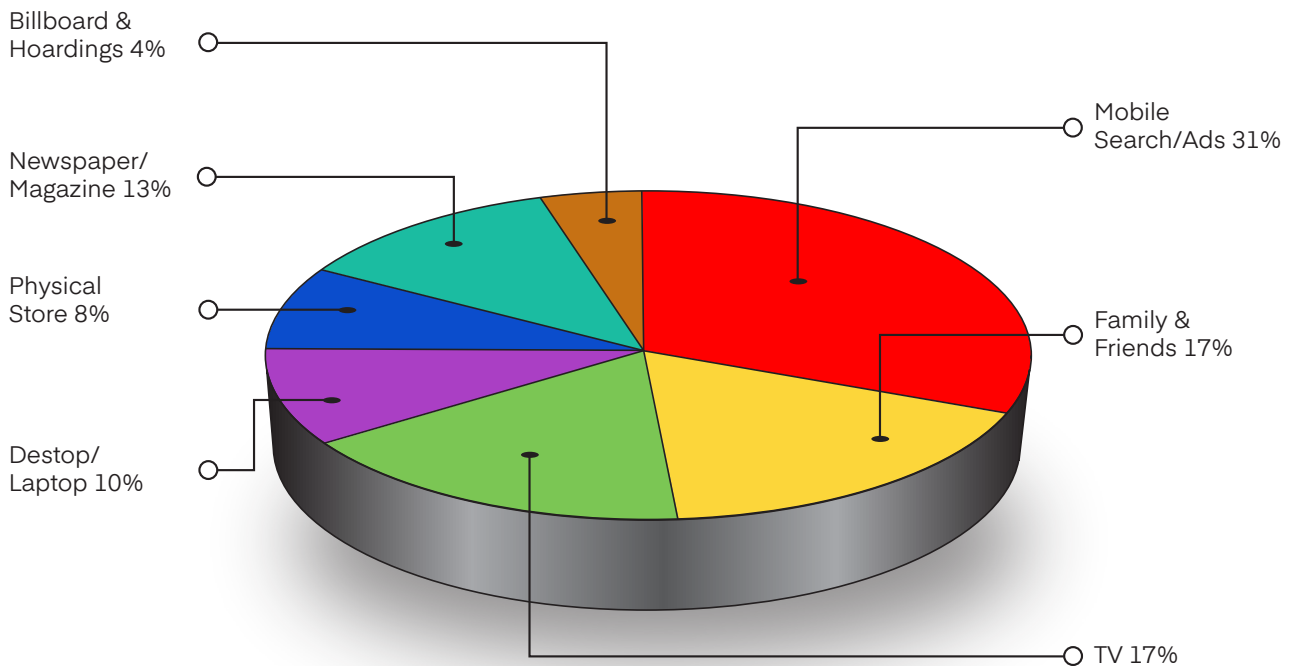


# Channels that consumers will use to Learn > Explore > Buy

## Where shoppers are set to Learn > Explore > Buy

Digital media platforms on mobile are shoppers' go-to when it comes to making their decisions as well as their purchases. The Indian shopper is constantly searching for products they like, comparing features, prices, and ultimately buying them – all on their mobile phones.

### CHANNELS TO DISCOVER FESTIVE SEASON SALES & OFFERS



Source: Decoding the Connected Indian Festive Shopper in 2021, InMobi

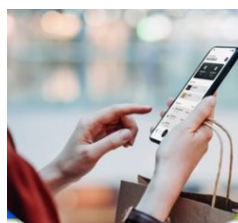
## Offline purchasing is on the line

- **62%** of shoppers overall in 2021 plan to shop online
- **44%** said they buy products online after seeing them at a retail store
- **53%** of millennial shoppers from non-metro cities prefer online shopping
- **50%** of Indians said they shop online with their family

Sources: Decoding the connected Indian festive shopper, 2021 Festive shopping outlook report, 2021, Shopify

## Shoppers are Mobile: 2021 Shopping App Usage

Shopping apps were the third most installed, with the highest installs seen just before the festive season.



Shopping apps were the second highest used, with people accessing them daily during the festive season.

Source: InMobi India Audiences Platform Dashboard, Aug to Oct 2021  
Decoding the connected Indian Festive Shopper, 2021



# Mobile Shoppers Need Mobile Brands

## Mobile: The Hero in the Shopping Journey

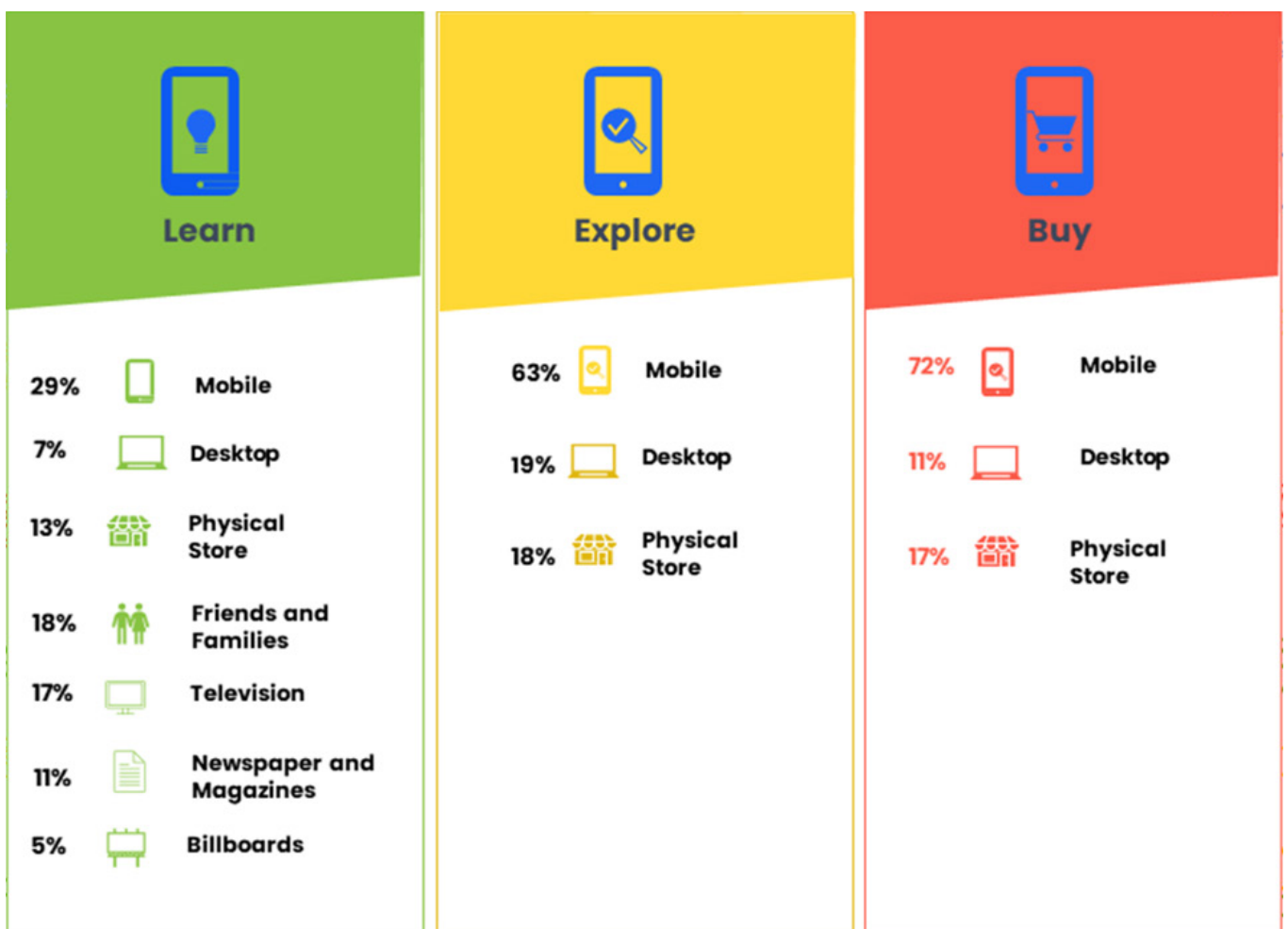
The Indian shopper is always on mobile, with their handset playing the biggest role in their learn > explore > buy journey:

**29%** said they buy products online after seeing them at a retail store

**63%** explore options on mobile

**72%** buy on mobile

## Mobile at the Heart of the Shopping Path: Learn > Explore > Buy



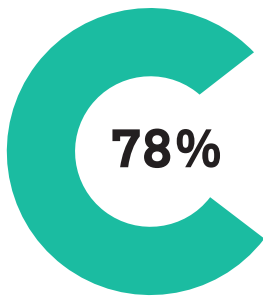
Source: InMobi Festive Season Consumer Survey, India, 2021

# Priorities that influence purchase decision

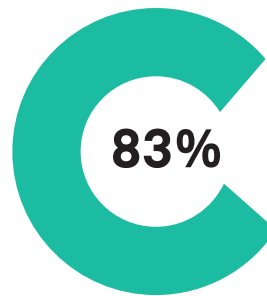
## Convenience, price or product?

When it comes to today's consumer making a purchase, the priority is convenience – even over price – a change that occurred since the pandemic. The convenience aspect of the shopping journey is now digitally enhanced, with research, decision-making and purchase being explored in a hybrid manner, combining online and offline stores.

## Customer is King – and Kings Need Convenience

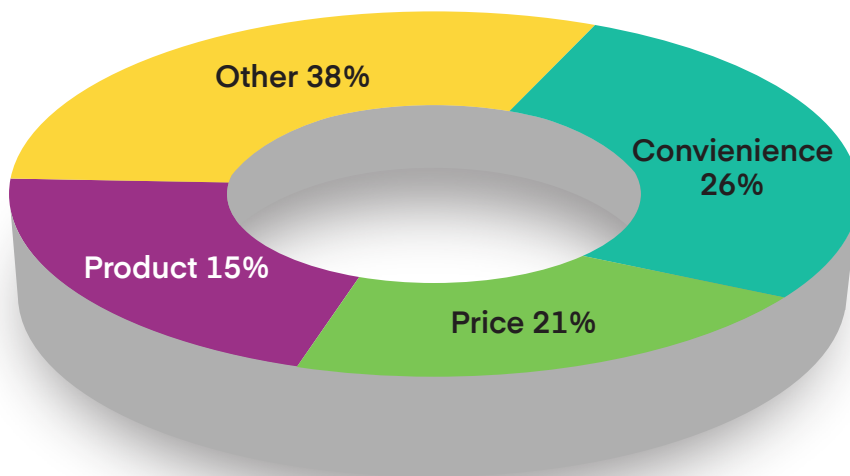


Consumers have begun to value convenience even more than they did before COVID-19



Expect flexibility in the journey – such as more shipping options or buying online and picking up in the store (BOPIS)

## Customer Priorities in the Shopping Journey – Convenience Trumps Price



Source: Deloitte InsightIQ Report Deloitte Research

## Surfing While Shopping: Exploring Options

- **1/3** consumers shop both in-store and online during the same occasion
- **2/3** shoppers used a digital device when in a retail store
- **9/10** times consumers compare products before making a purchase
- **72%** buyers shop at more than one retailer and 30% at three or more

# What's in-store

The **first half of 2022 saw a considerable lift in footfall** – with more shoppers opting for an in-store experience at least as part of their overall shopping journey. This is **projected to increase further during the festive season**.

## The Indian consumer is no longer thrifty

- In 2021, Indians spent \$9.2 billion in online shopping during the festive season!
- The average gross merchandise value (GMV) per shopper grew by a sizeable 4% in 2021.
- Discounts and deals drove this spike, encouraging Indians to shop more.

## Hybrid is not just a working model – it's a shopping model too!

Indian buyers today are not completing their journey on one channel. They are either browsing offline and buying online, or vice versa. 52% of Indians purchase products online via apps, with 44% buying online after browsing in-store.

## A Hybrid Case

Buying jewellery in-store is almost non-negotiable, with the factors of trust, design and investment coming into play. But that does not mean the buyer's journey can't begin online.

Here is how GRT Jewellers, a household name in jewelry founded in Chennai, leveraged mobile to drive footfalls, paving the way for hybrid shopping.

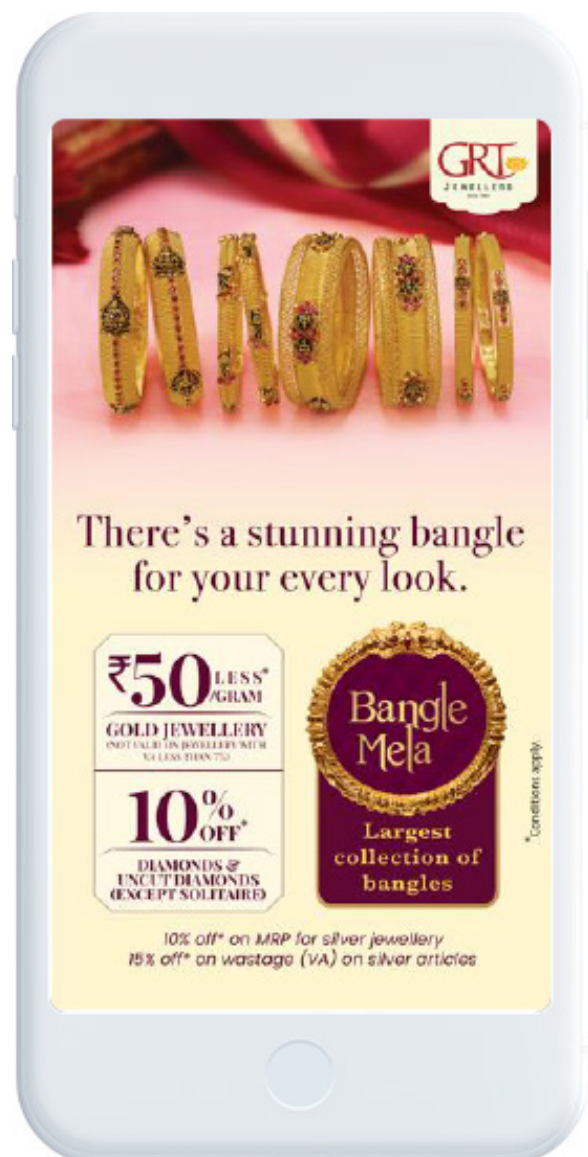
A glimpse of the sparkle:

**1.2x CTR**

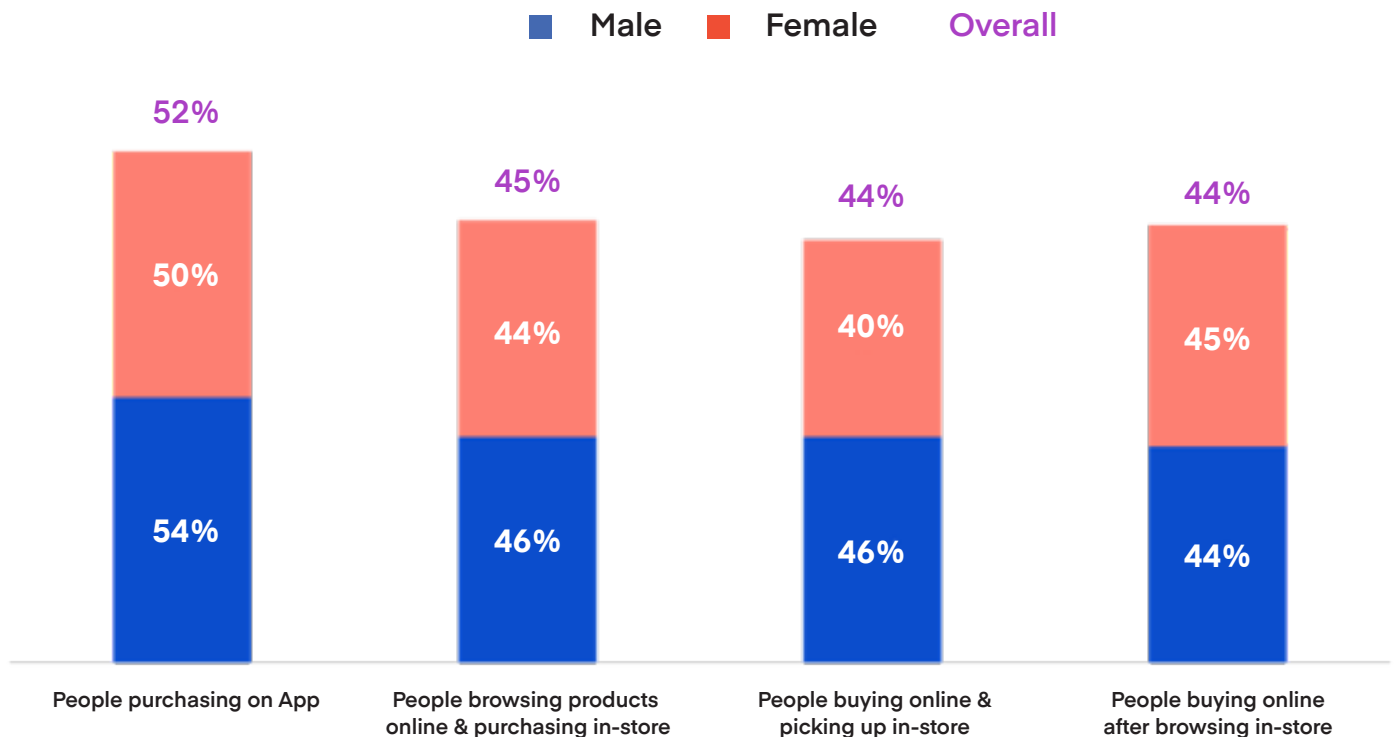
**3x more effective cost per footfall**

[Read how GRT dazzled on mobile.](#)

Source: Festive shopping outlook report, 2021,  
Shopify India festive season 2021 report, RedSeer

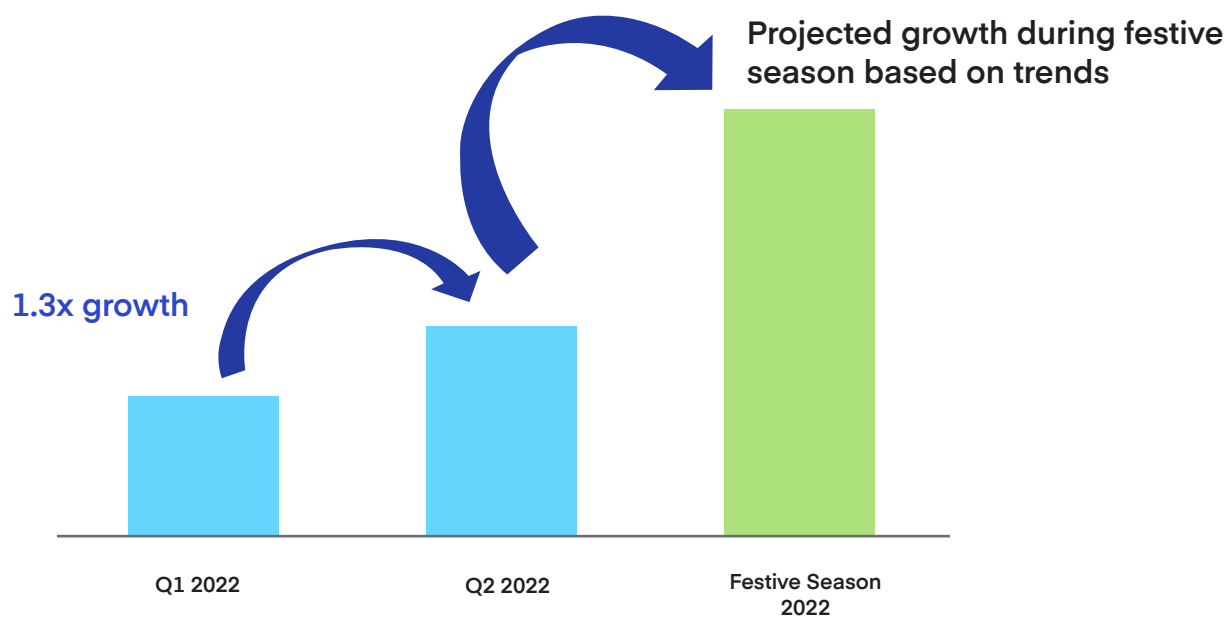


# Breaking down the hybrid shopping trend in India



Source: Criteo, 2022 India Shopper Story Report

## Breaking down the hybrid shopping trend in India



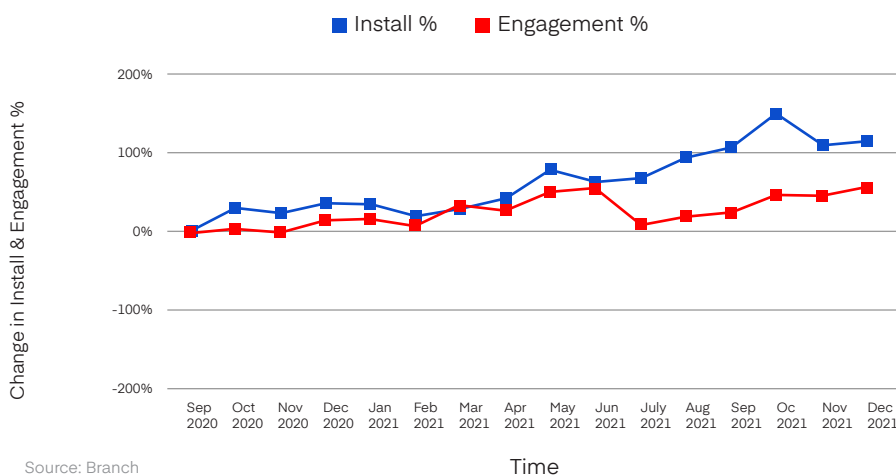
Source: InMobi India Audiences Dashboard Aug to Oct 2021





# Fintech apps

## App Install and Engagement trends



Digital payments in India are no longer the fiefdom of a select few. A movement which started with demonetisation in 2016 and accelerated with the pandemic and lockdowns; has driven millions of people to cashless convenience, and the trend has permeated every sector. Today India is amongst the fastest growing Fintech markets in the world.

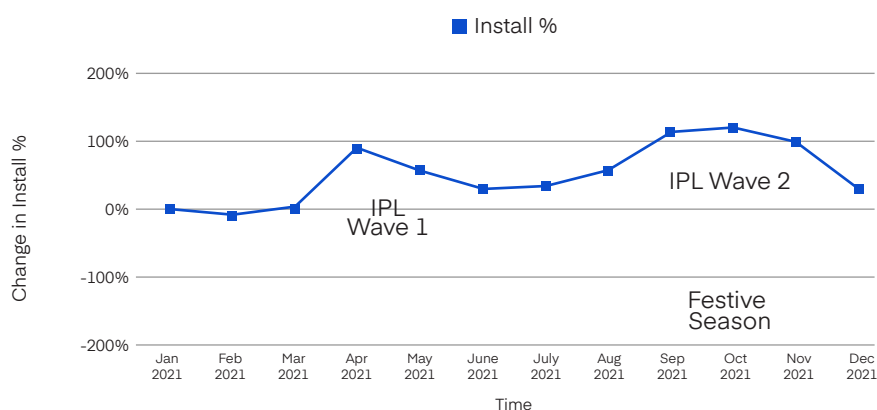
Looking at 2021, a significant rise in app installs is seen during the festive season until the new year. There is a massive spike during Diwali when consumers either upgrade their homes with gadgets or furniture, send money home, or go on vacations. This year in 2022, as restrictions are lifted, there will be pent up demand from the users to plan their spends, even with looming inflation pressures.

There is an opportunity for fintech apps to optimise their touchpoints with their customers and reach out to them via their preferred communication preference to proactively engage with customers, resolve queries and assist in onboarding, by leveraging the insights they have to segment their audiences.



## Real Money Gaming apps

### App Install and Engagement Trends



Source: Branch

Real-money gaming apps  
**60% ↑**  
in engagement  
(2021)

Source: InMobi 2021 Festive Season Guide for App Marketers

80 million people were paying gamers in 2020, with real-money games still accounting for the majority of the market's revenue, according to the [India Gaming Report 2021 by Lumikai and RedSeer](#).

In 2021, real-money gaming apps saw a 60% increase in engagement.

Real-money gaming apps surge in use during September and October as rummy and teen patti games become the craze. Fantasy cricket apps as well as online card games also increase during this period. We can expect to see engagement rise in October and November this year due to the upcoming Diwali season and the T20 World Cup.

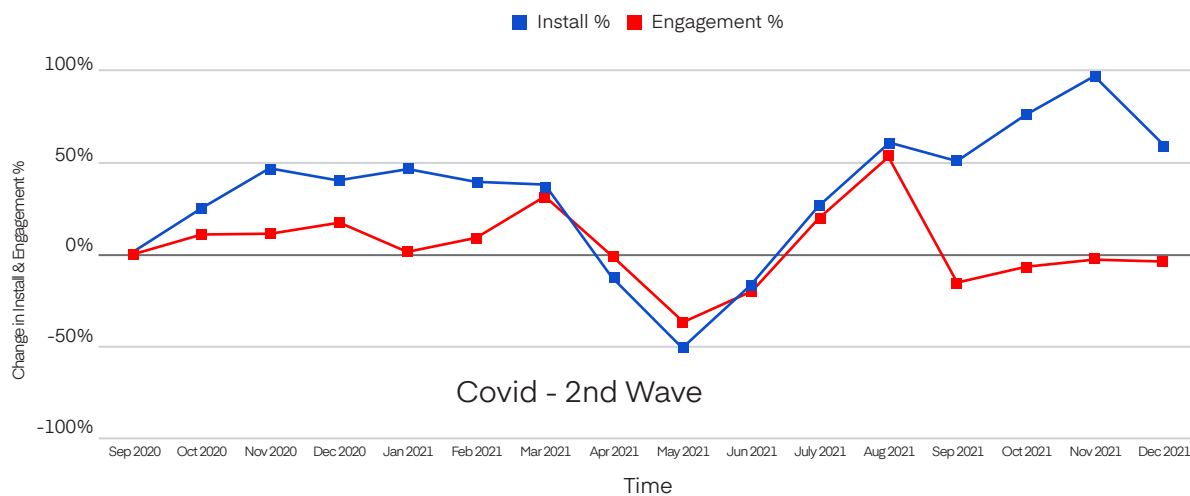
App marketers can leverage in-app strategies, including referrals, to re-engage their users and increase their growth in this fiercely competitive market.





# Travel apps

## App Install and Engagement trends



Source: Branch

Last year, the travel apps category was fueled by long weekends and festivals lasting up to 10 days, such as Independence day, Janmashtami, Navratri/Durga Puja, Dussehra and Diwali. In addition, schools closing for their mid-term break further enhanced the demand for family travel. The dip seen in April through June 2021 was due to the second wave of COVID-19 in India and the lockdown which followed.

This year, revenge travel and work-from-anywhere has made travel aggregators and booking companies reach-and in some cases even surpass-pre-pandemic levels. We will continue to see this demand increase in the festive season of 2022, despite rising fuel prices for both domestic and international travel.

Travel apps need to look at driving more engagement within their apps by creating a solid segmentation strategy to re-engage newly acquired users and drive app growth. Read Branch's [travel whitepaper](#) to leverage what other travel apps are doing globally.

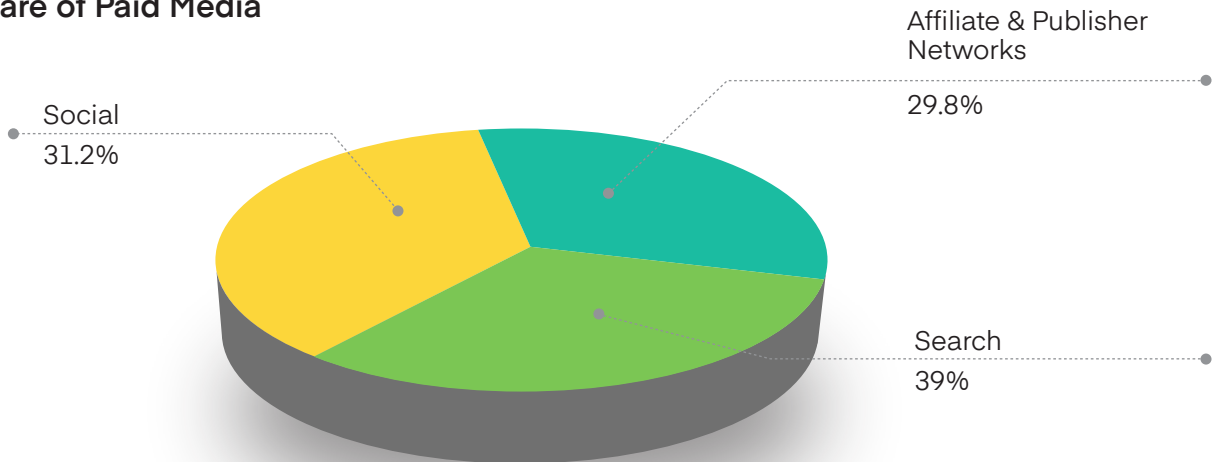
Source: Branch

# TRENDS FOR MARKETERS



# Understanding Paid Media

## Share of Paid Media



Source: Branch

Paid media drive a significant volume of installs within India.

Companies are spending more than ever before on paid acquisition, and CPMs continue to rise. This rise in CPMs pushes advertisers to split their budget with platforms and networks to balance their cost of acquisition and retention.

Going forward in 2022, It will be interesting to see the impact in India as recession hits the global markets. Global ad platforms can try to extract more out of the India region which can further increase the cost of acquisition for Indian advertisers.

### Top 5 Ad Platforms\*

Google

Youtube

Facebook

Instagram

InMobi

They will need to experiment with their marketing mix to ascertain the impact of paid, direct and organic channels on attribution.

Source: \*Top platforms are listed by volume on Branch platform

# Insights on how brands should shape their media and communication strategies across the consumer funnel

## The Lit Bit: How to Win the Heart of the Festive Shopper

### 4 steps to success with the festive shopper

- 1. Plan the party: The Planning Phase**  
Now that you know the mind of the festive shopper, understand the finer nuances with first party and third-party signals
- 2. Throw the party : The Executing Phase**  
Reach the right audience with the power of precise targeting in programmatic platforms
- 3. Have a blast: The Engaging Phase**  
Engage your audience with immersive and innovative content and experiences
- 4. Celebrate: The Measuring Phase**  
See the success – and measure it with a brand lift study and end-to-end attribution across the funnel

..... Watch your brand glow! .....

## Engaging new and existing users during the festive season

Advertisers pay a premium to acquire users during this period, but how do you have them coming back to the app in the months that follow; to foster brand loyalty and increase user lifetime value. This directly goes hand in hand with increasing ROI and revenue — the longer a user has a relationship with your brand, the more likely they are to perform the in-app actions that define your business KPIs.

### Here are few tips to drive better engagement and retention

- 1: Effective & Customized Onboarding**  
Create a simple onboarding process as well as a user flow that lets the users personalize their app experience to make it more relevant to their interests and goals
- 2: Perfect Push Notifications**  
Use push notifications that are tailored to your users' needs and interests. Leverage deep links to direct users to relevant in-app content to drive higher retention and conversion.
- 3: Use Content to engage users**  
Keep users interested with new and engaging content like interactive Instagram stories, polls, video challenges, and competitions which links to the relevant content within the app
- 4: Run multi-channel re-engagement campaigns**  
Partner with ad networks and run paid ads targeted towards existing users in order to get them to perform a specific in-app action. They can be strategically used with organic methods to prevent churn and revive dormant users
- 5: Leverage Referral Programs to Re-Engage**  
Effective referrals program can accelerate adoption and usage by incentivizing users to refer other users to install your app which then promotes additional installs and loyalty

# CONCLUSION: THE FESTIVITIES ARE MOBILE

India's ever-growing mobile and internet usage empowers marketers to make their brands shine bright this festive season.

With an audience that is more than willing to embrace the digital world with open arms, the opportunities to drive installs, engagement and purchases are many.

However, as audiences turn to mobile to watch, play and buy, their expectations of value for money and meaningful experiences are constantly on the rise. So, it is imperative to double down on engagement and retention strategies by going beyond installs or traditional advertising to bring ROI in the increasingly competitive market.

This festive season, ensure your audience has a blast.

# METHODOLOGY

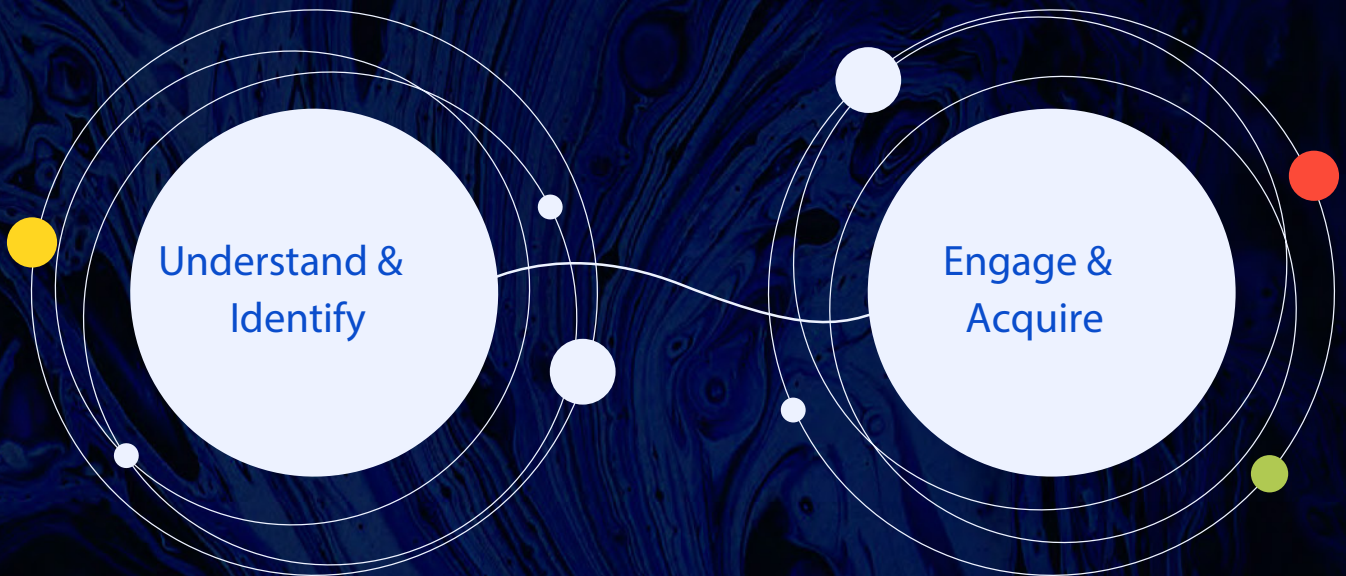
**This report by Branch & InMobi reveals trends across apps in India.**

These insights are also based on findings from InMobi's Data Platform and InMobi's Audience Intelligence Platform between Q1 2021 and Q2 2022. This covers data from over 330 Million smartphone users across 44K+ apps. The Branch data has been gleaned from 4.1 billion app installs and 5.2 billion deep links in the period from September 2020 to December 2021

In addition, we have removed any fraudulent clicks, installs, and conversions prior to analysis.



# InMobi



InMobi drives real connections between brands and consumers by leveraging its technology platforms and exclusive access to mobile intelligence. Its Marketing Cloud creates new paths for brands to understand, identify, engage and acquire connected consumers.

Powered by

Mobile Intelligence

Transparent

Always On

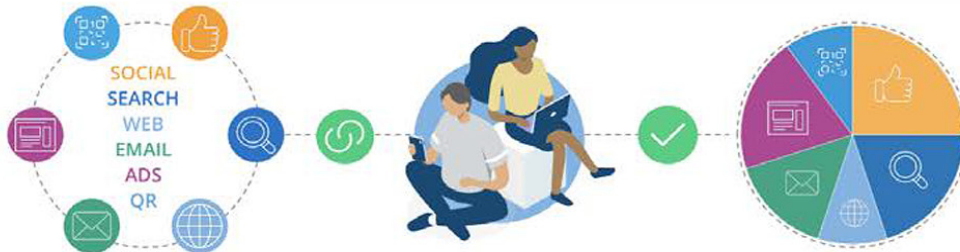
Integrated

Interested in learning more? Write to us at

[mobilemarketing@inmobi.com](mailto:mobilemarketing@inmobi.com)



# Unified linking and measurement for complex customer journeys



## Improve your workflow

Easily deploy and scale deep linking and campaign measurement across all marketing channels.

## Deliver better experiences

Route users where you want them to go, regardless of their platform or device, reliably and always.

## Make smarter investments

Increase ROI with accurate insight into omni-channel campaigns, without running privacy risks.

## Unlock additional marketing value with Branch

### Uncover your true customer journey

Get maximum coverage for every campaign, team, and initiative with a suite of products for acquisition, engagement, and optimization. Branch enables you to meet users wherever they are, take them to the best location for what they want to do next, and provide reliable measurement data.

### The result

With the power of Branch in every channel, you have happier, stickier customers, and the data you need to increase marketing ROI.



## MLP

INDUSTRY-LEADING  
MOBILE LINKING  
PLATFORM

- Enable your teams to leverage the app in every kind of marketing campaign.
- Take users to the right place with links that just work, even through app install.
- Deploy deep links and capture attribution across owned and earned channels.
- Unlock new ways to acquire users with simple link creation and powerful APIs.
- Centralize your campaign data in one place, and easily export it to other systems.

## MMP

PRIVACY-FIRST  
MOBILE MEASUREMENT  
PLATFORM

- Reduce the need for in-house engineering work with configurable, pre-built solutions.
- Attribute ads more accurately with tools designed for complex, omni-channel brands.
- Shield your teams from disruptions caused by privacy updates and ecosystem changes.
- Protect your ad budget with a platform that catches and deters fraud by design.
- Increase your ad campaign ROI by providing better deep linked user experiences.