

State of eCommerce 2026

Unpacking Mobile and Web Performance, Consumer Trends and Growth Strategies Across General Marketplace, Fashion, and Beauty eCommerce



Sensor Tower

Overview

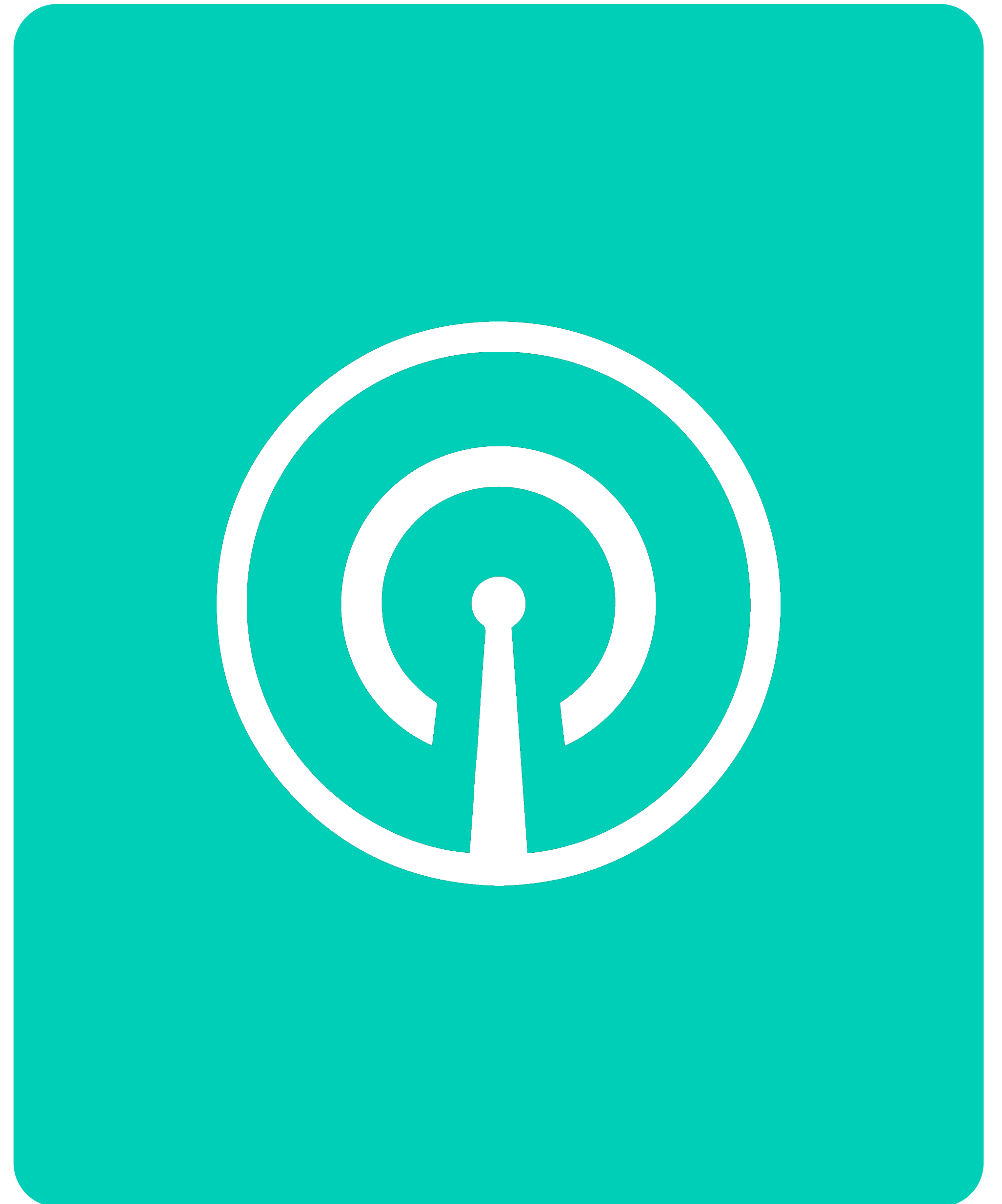
Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

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 organisations to stay ahead of changing market dynamics and make informed, strategic decisions.

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

Press Inquiries: press-apac@sensortower.com

Business Inquiries: sales@sensortower.com



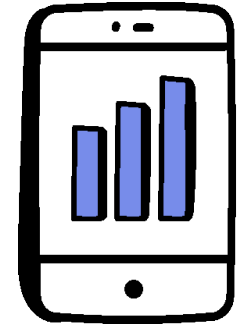
Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google		 European Commission	Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
 fetch REWARDS		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYeS	Tencent 腾讯	 WARNER BROS. GAMES	P&G	NBA
 CVS Health.	 Domino's	Johnson & Johnson		Welch's	Revolut

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

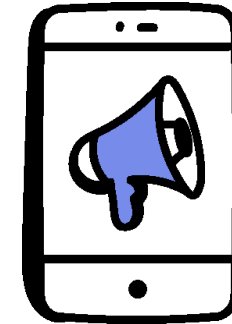
Sensor Tower Solutions



Sensor Tower **App Performance Insights**

**For those who need visibility
into the mobile app ecosystem.**

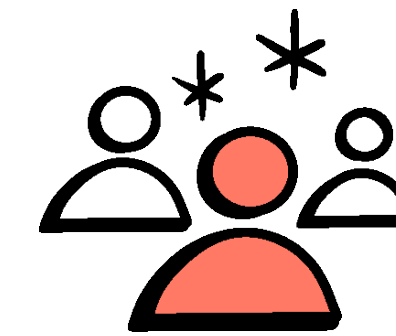
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

**For those who need visibility
into paid user acquisition
strategies.**

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



Sensor Tower **Audience Insights**

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

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

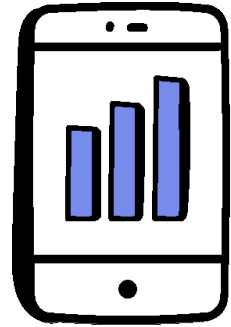


Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility
into the digital ad ecosystem.**

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

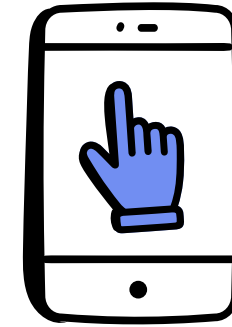
Sensor Tower Solutions



Sensor Tower **Gaming Insights**

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

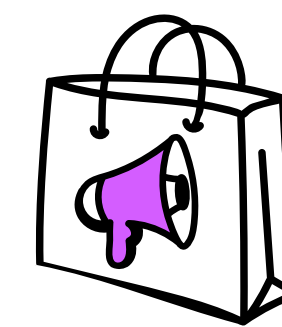
Enjoy insight into: downloads, revenue, RPD, and ARPD AU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



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, minimise 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, Indonesia, India, Japan, Malaysia, Mexico, New Zealand, Philippines, Singapore, Spain, South Korea, Thailand, the United Kingdom and Vietnam. 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 utilises 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		•						•	•	•		•	
Indonesia		•		•				•	•		•	•	•
Italy		•						•	•	•	•		•
Japan		•	•		•						•	•	•
Malaysia		•						•	•		•	•	•
Mexico		•									•		•
New Zealand	•	•				•							•
Philippines		•			•			•	•		•	•	
Singapore		•							•		•		•
South Korea		•			•						•		•
Spain		•						•	•	•	•	•	•
Thailand		•	•								•		•
United Kingdom	•	•		•	•	•		•	•	•	•	•	•
Vietnam		•						•			•	•	•

Agenda

Introduction & Methodology	08
Global eCommerce Trends Overview	09
General Marketplace eCommerce	15
Fashion eCommerce	18
Beauty eCommerce	23
Case Studies: Nykaa, Olive Young & UNIQLO	28
Key Takeaways	40

Sensor Tower

Executive Summary

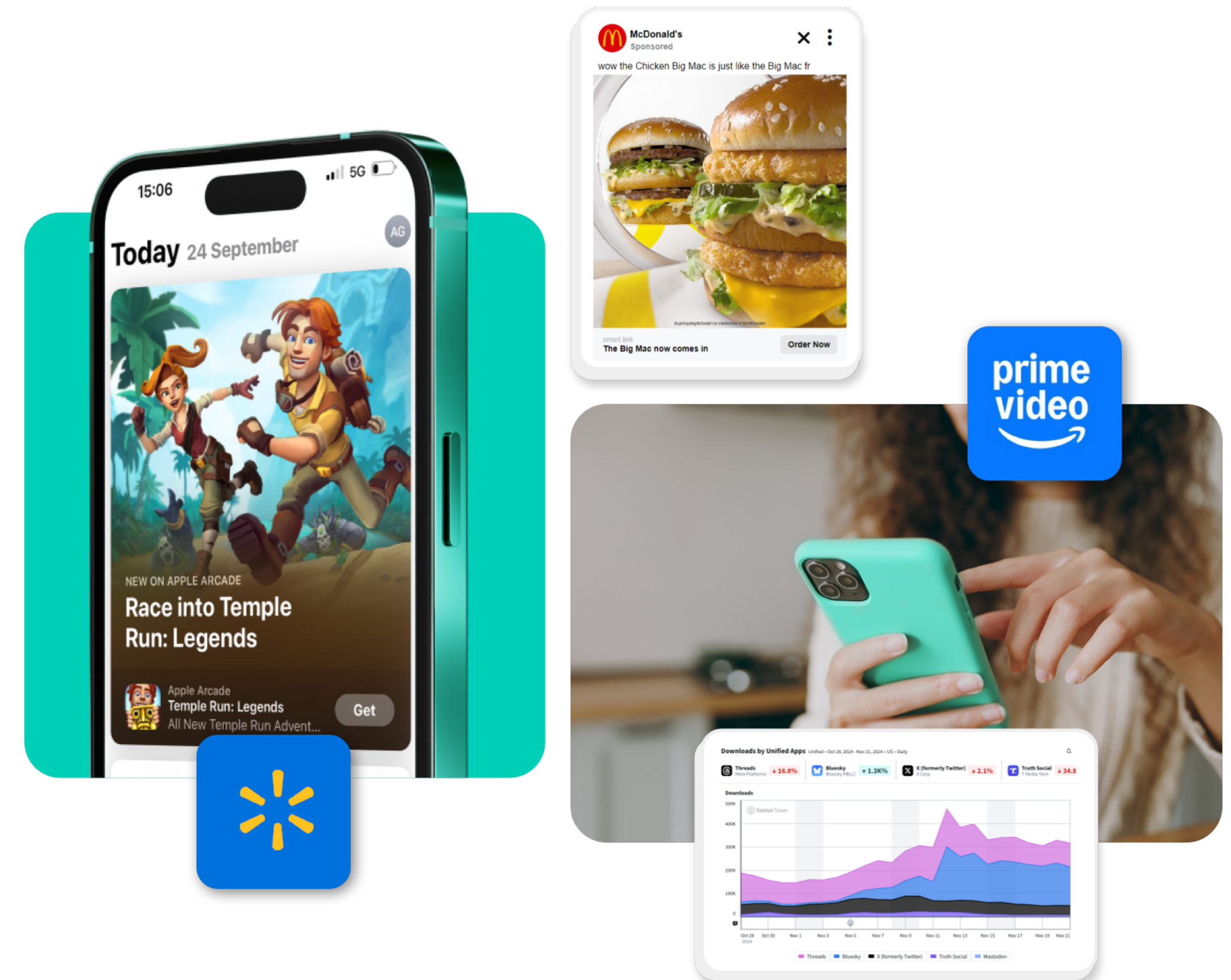
This report provides an in-depth analysis of the key trends shaping the global eCommerce industry in 2026. It examines the market landscape across mobile and web, regional website traffic growth dynamics and category-specific trends and leading player performance across core segments including general marketplace, fashion and beauty eCommerce.

The report also features benchmark case studies of leading regional eCommerce players including Nykaa, Olive Young and UNIQLO – unpacking their business highlights, advertising strategies and audience profiles to help brands develop more precise market strategies.

Notes on Download and Website Estimates

Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.

Sensor Tower's website traffic and unique visitor metrics include both desktop and mobile web activity across 56 available markets worldwide.



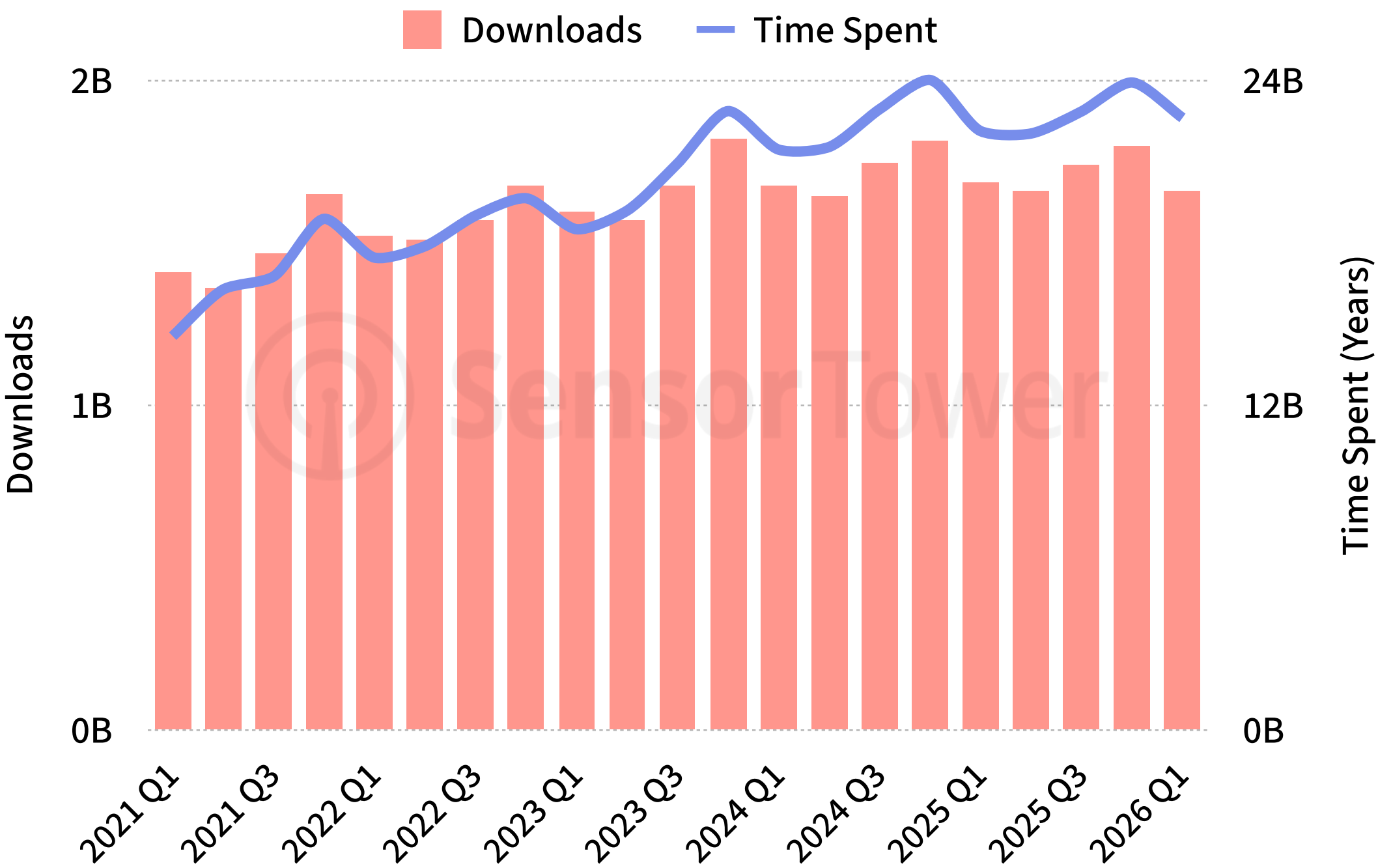


Global eCommerce Trends Overview

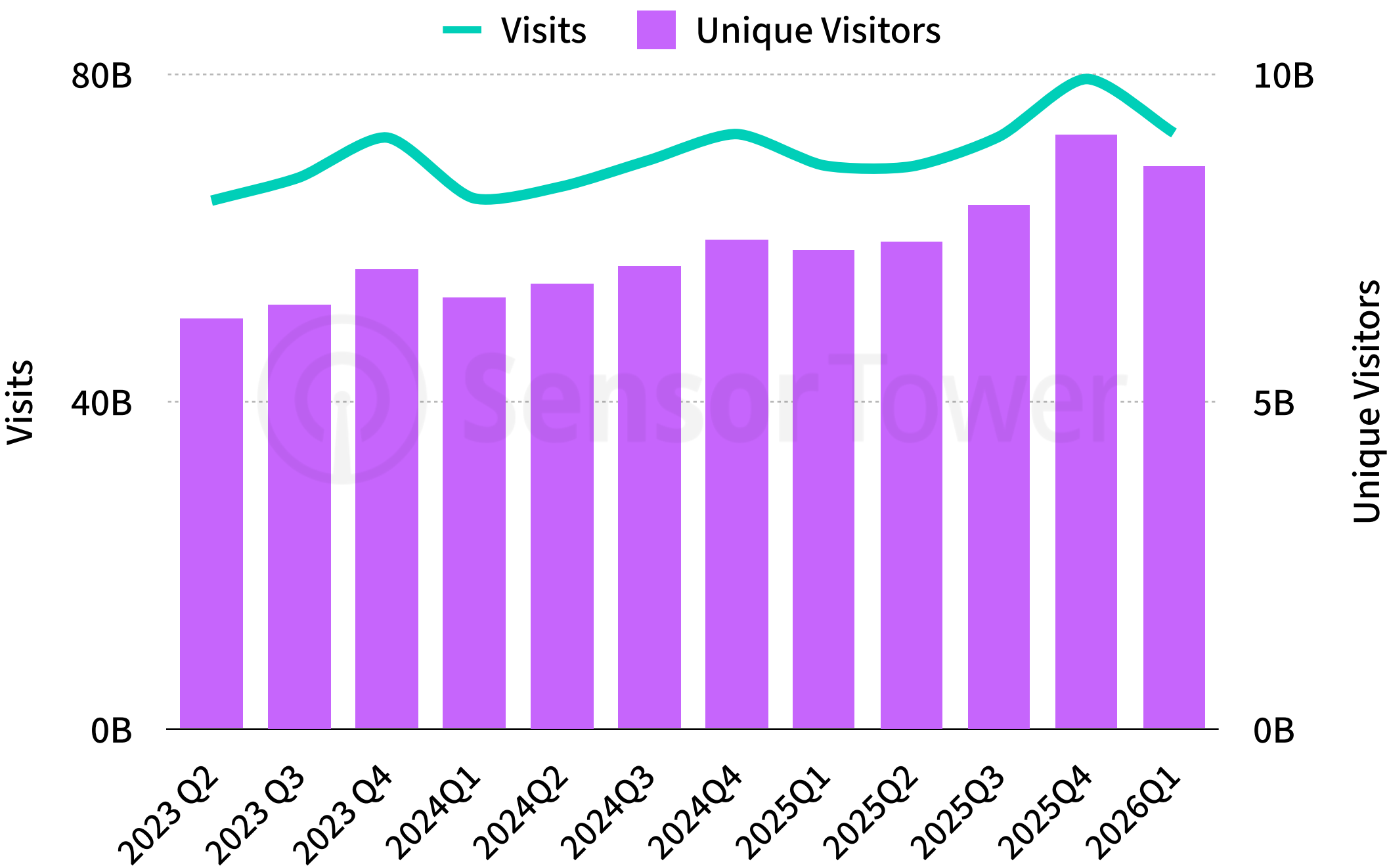
Global eCommerce Trends: Website Traffic Hits Record Levels as Mobile Growth Matures

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

2021 Q1–2026 Q1 Global eCommerce App Downloads and Time Spent Trends



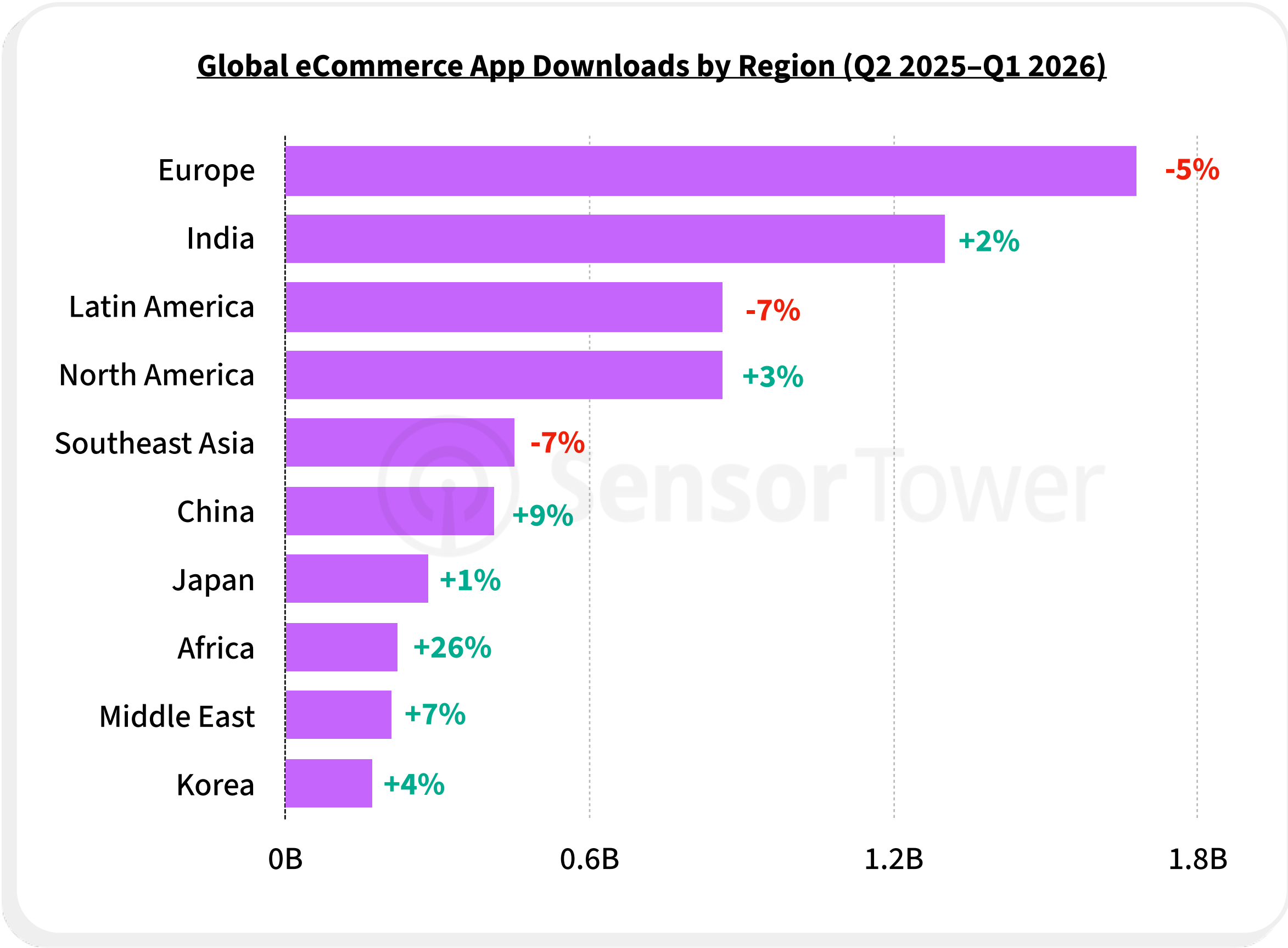
2023 Q2–2026 Q1 Global eCommerce Website Visits and Unique Visitors Trends



Global eCommerce continues to demonstrate strong seasonal patterns, with major shopping events such as Black Friday, Christmas and New Year driving annual traffic peaks across channels in the fourth quarter. In Q4 2025, eCommerce websites reached record levels, with visits rising 9% YoY and unique visitors increasing 21% YoY. Meanwhile, after reaching peak levels in 2024–2025, mobile user scale and engagement have stabilised at consistently high levels.

Global eCommerce Growth Map: India Website Traffic Surges 28%, Africa Mobile Downloads Rise 26%

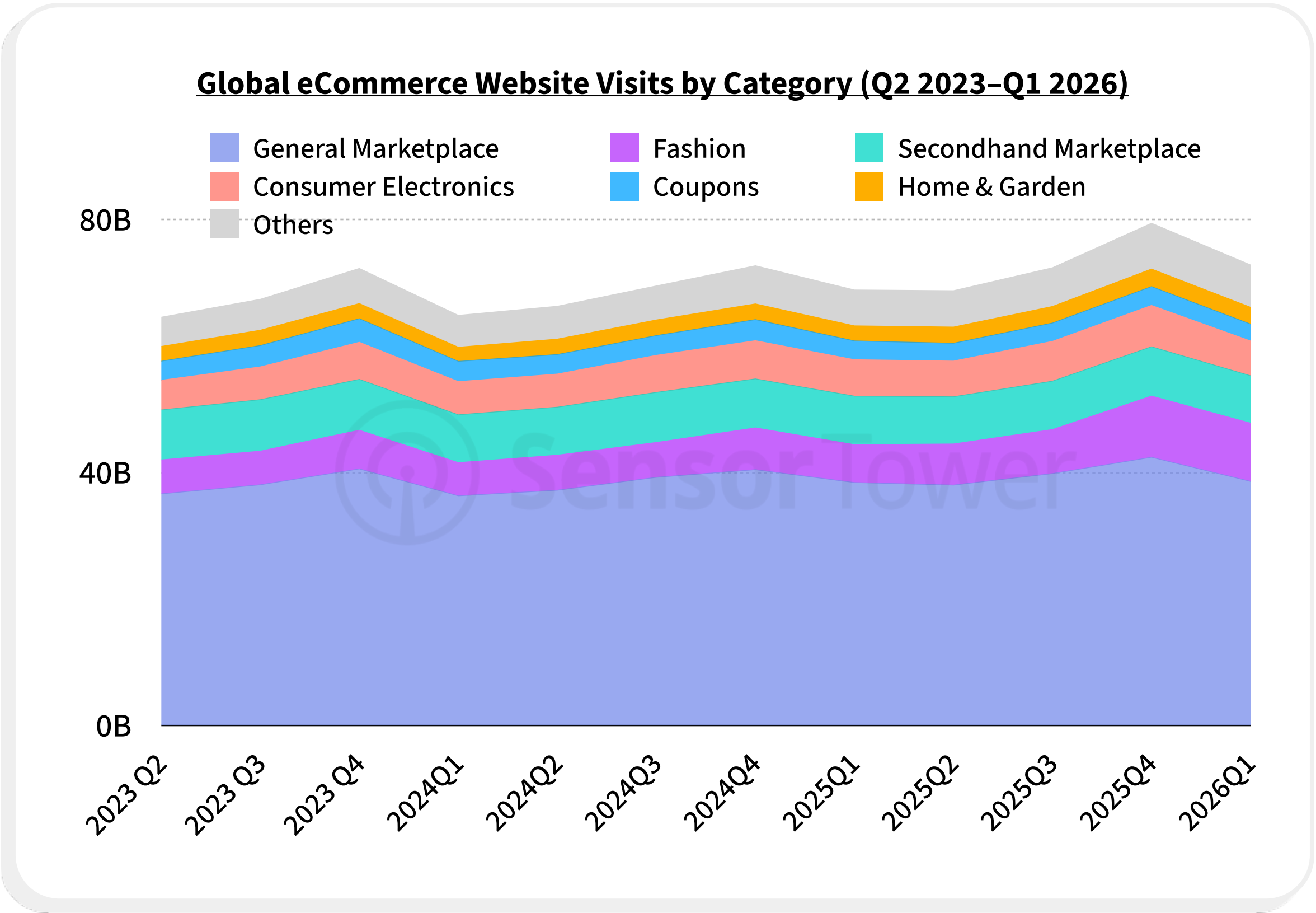
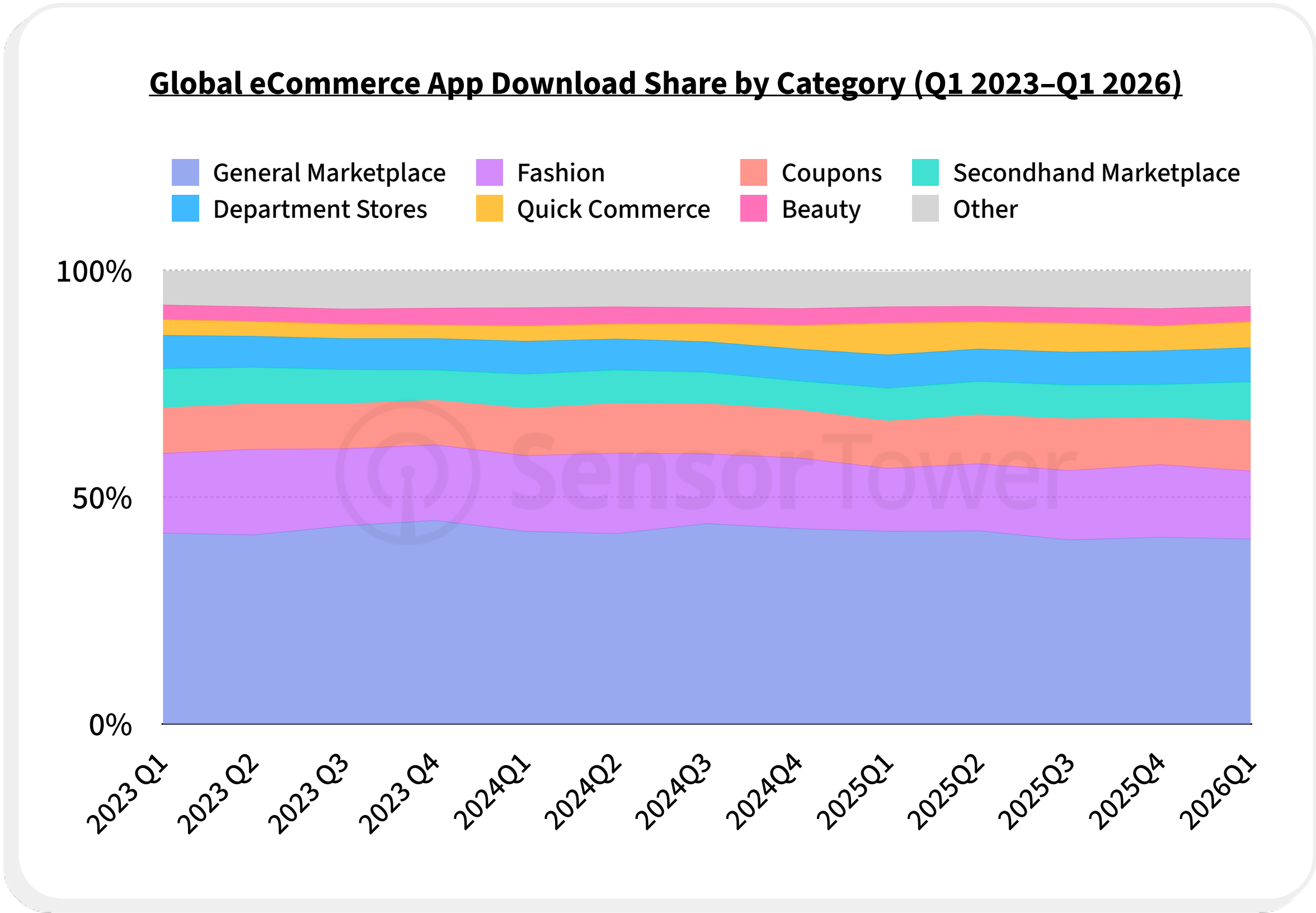
Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



Mobile download growth has largely stabilised across global eCommerce markets, with Africa standing out as the fastest-growing region, posting 26% year-over-year growth and serving as a key engine of global expansion. On the web, India continues to lead both in scale and growth, generating nearly 58 billion visits over the past 12 months and delivering a 28% increase year over year – well ahead of other major markets.

Global eCommerce Landscape: General Marketplace Account for Over 40% of Apps Downloads, While Fashion eCommerce Website Traffic Grows 54%

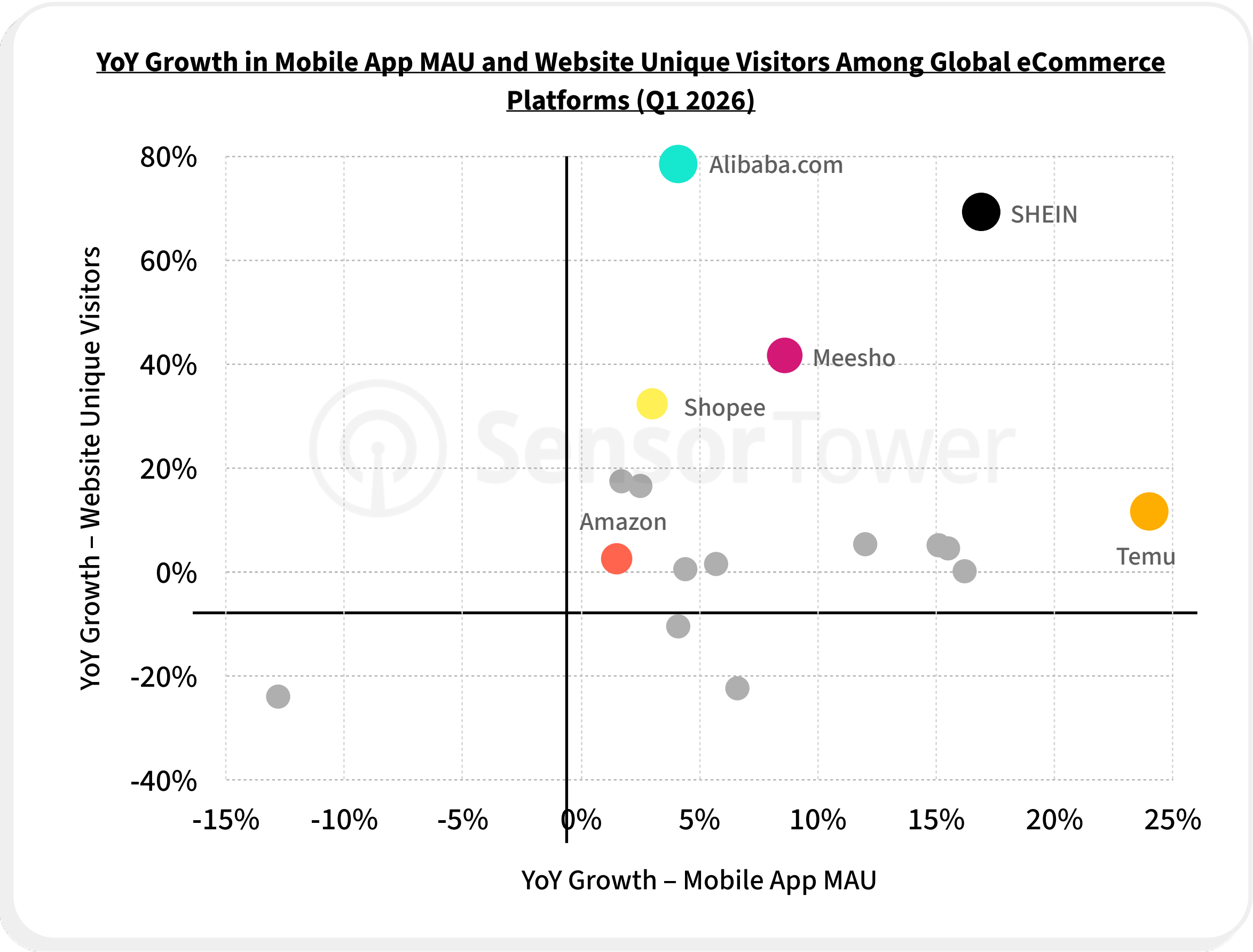
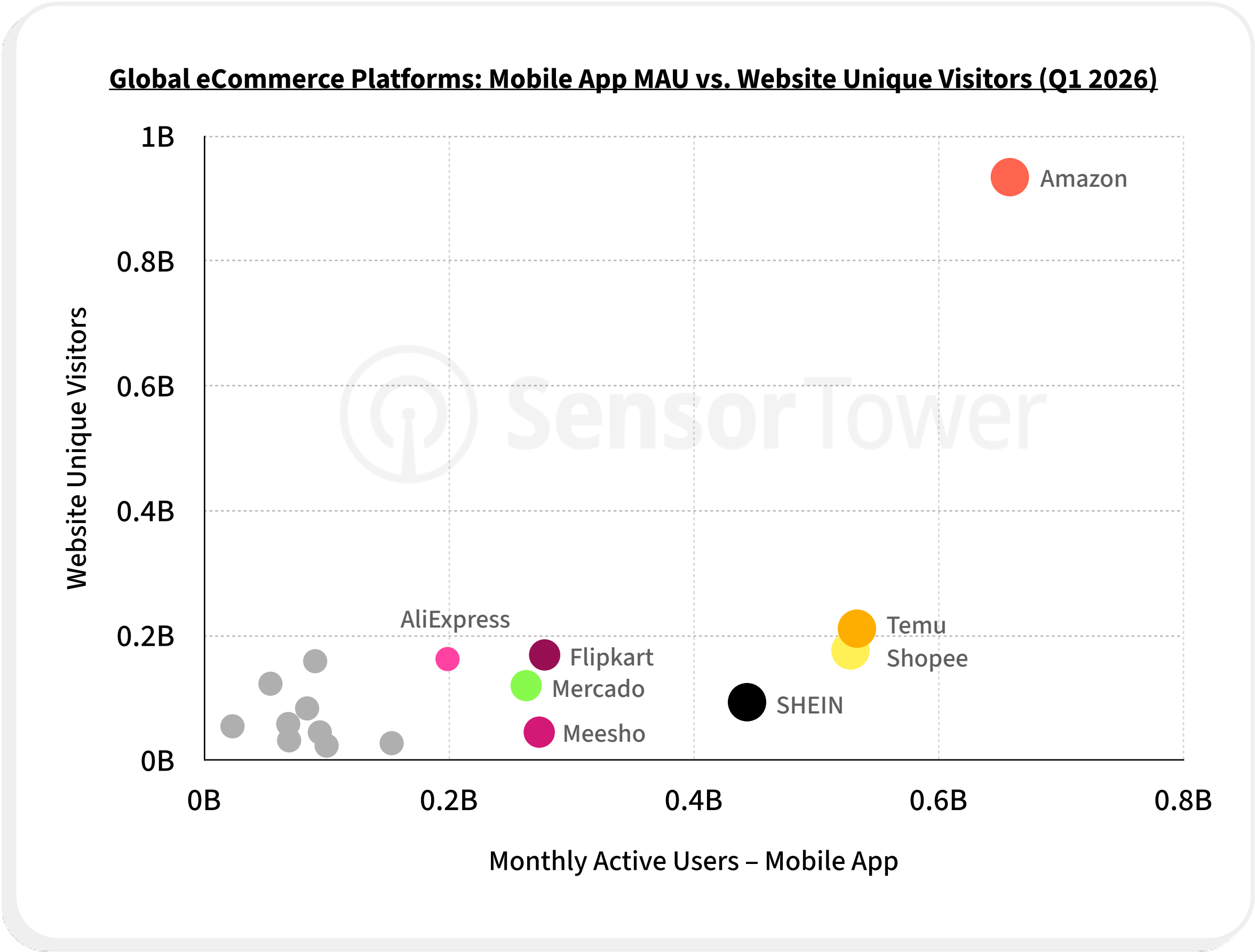
Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



General marketplace platforms remained the foundation of global eCommerce in Q1 2026, accounting for 41% of app downloads. Fashion (15%), coupons (11%) and secondhand marketplaces (8.6%) followed, while beauty eCommerce represented just 3.4% of total downloads. On the web, fashion eCommerce emerged as a standout growth category. Website visits climbed from 5.25 billion in Q1 2024 to 9.2 billion in Q1 2026, representing 75% growth over two years. By Q1 2026, the category accounted for 12.6% of total eCommerce website traffic, making it an increasingly important growth channel for fashion brands.

Leading eCommerce Platforms: Temu Ranks #2 Globally in Both Mobile and Web Users, While SHEIN’s Website Unique Visitors Surge 70% YoY

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

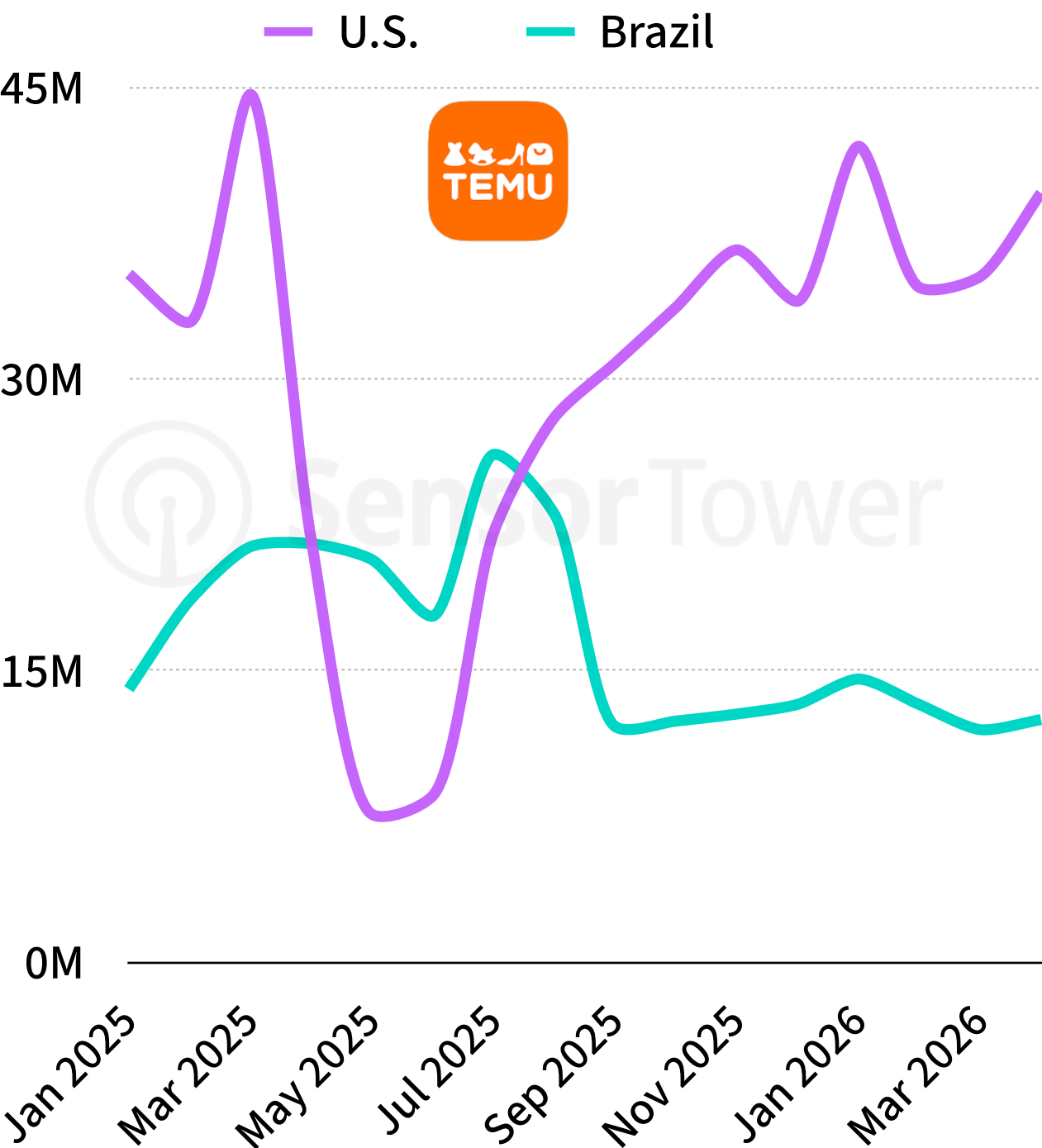


Amazon remained the global leader in cross-platform user scale in Q1 2026, though growth slowed across both mobile and web. Temu ranked second globally in both mobile MAU and website unique visitors, with mobile MAU increasing 24% year over year – the strongest growth among eCommerce platforms. SHEIN led website audience growth, with unique visitors surging 70% year over year in Q1 2026. Meanwhile, Alibaba.com, Meesho and Shopee also outperformed industry benchmarks, highlighting the growing importance of web channels in customer acquisition strategies.

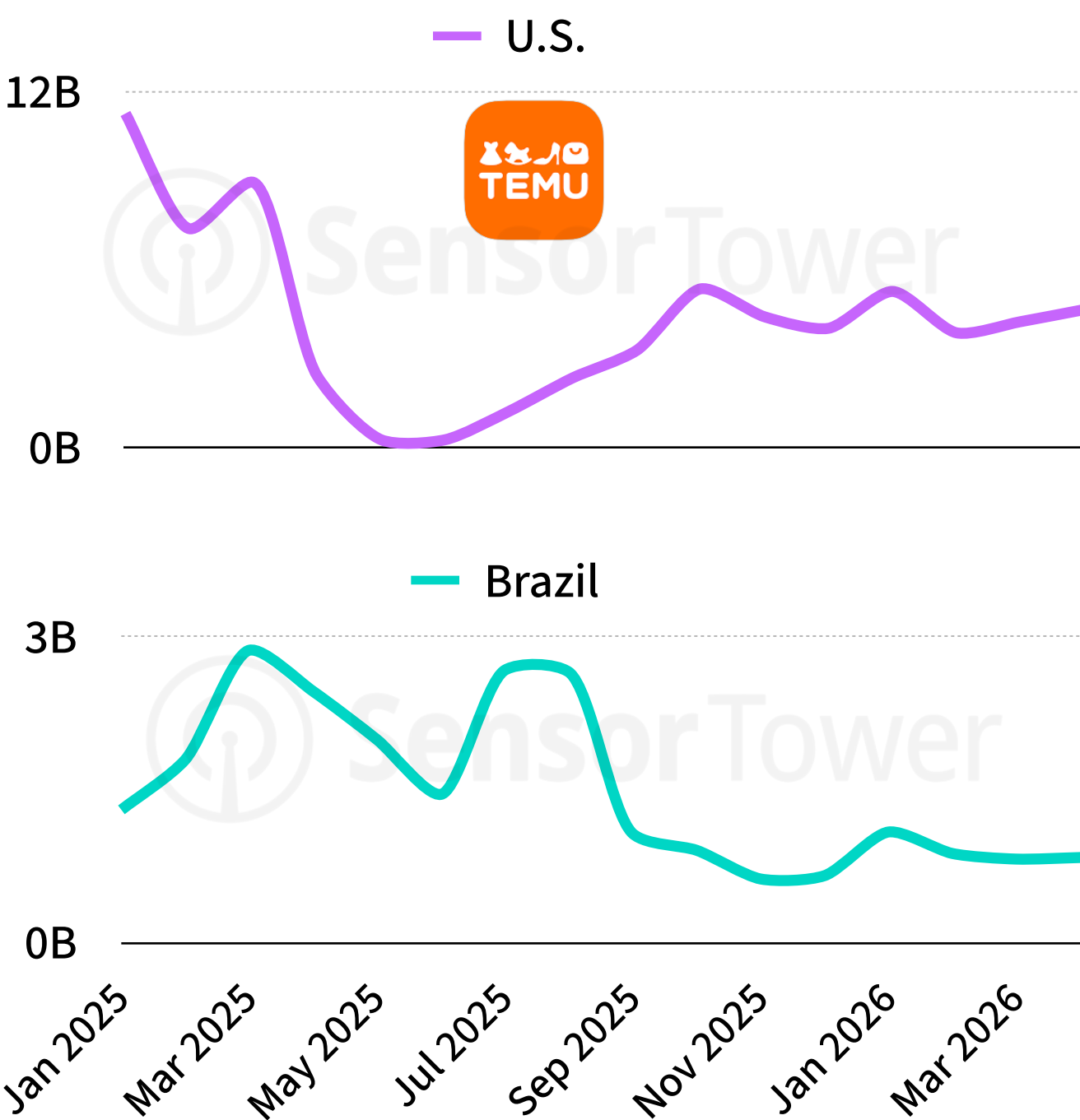
Expanding Growth Markets, Optimising Ad Investment, Strengthening Brand & Website Performance Become Key Priorities for Leading eCommerce Platforms

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

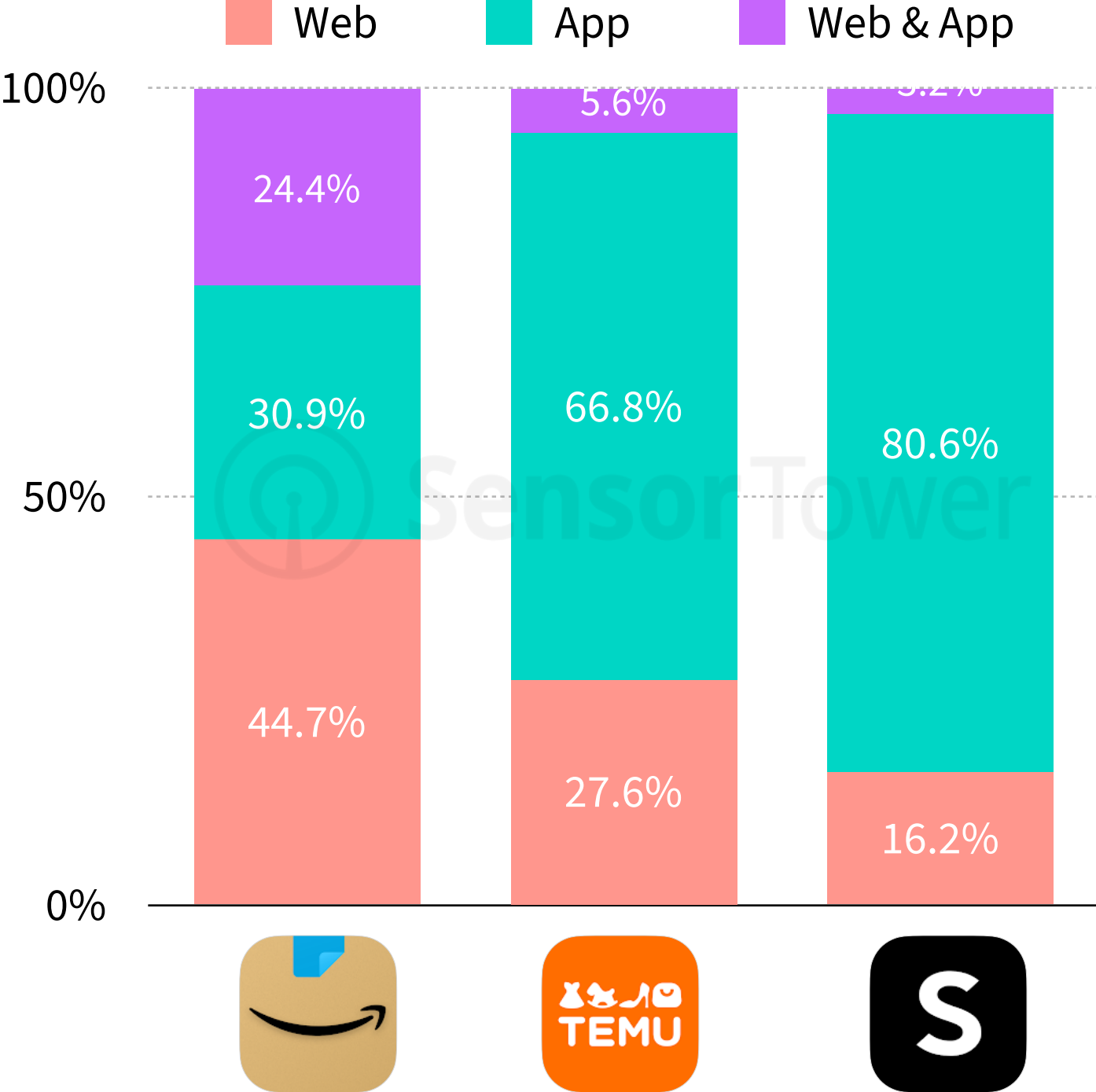
Temu Website Unique Visitors (Jan 2025–Apr 2026)



Temu Ad Impressions (Jan 2025–Apr 2026)



User Overlap Across Amazon, Temu & SHEIN (Q1 2026)



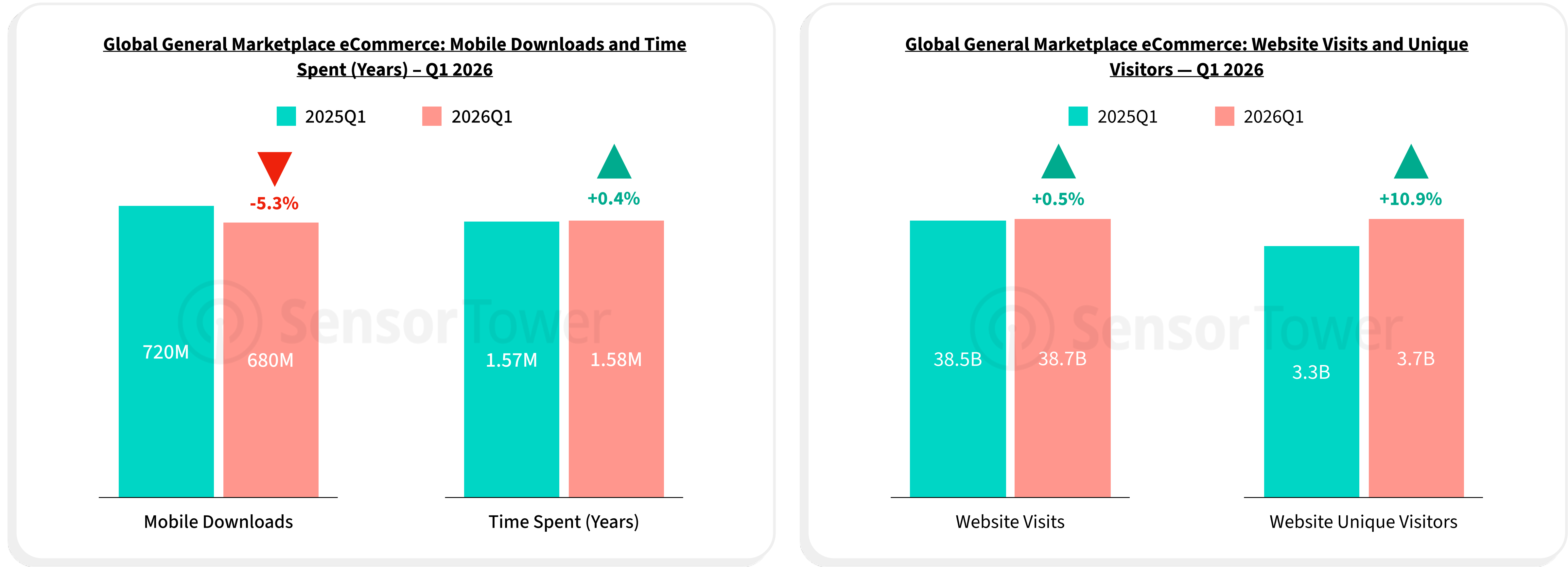
Temu recalibrated its growth strategy in 2025, scaling back U.S. ad investment while accelerating expansion in emerging markets such as Brazil, where website traffic increased alongside marketing activity. Unlike Amazon’s relatively balanced cross-platform audience, Temu and SHEIN continue to rely primarily on mobile apps, with limited overlap between web and app users. As competition intensifies, improving website performance and strengthening brand presence are becoming critical growth levers for expanding reach and acquiring users across global markets.



General Marketplace eCommerce

Global General Marketplace eCommerce: Website Unique Visitors Grow Nearly 11%, While Mobile Activity Stabilises

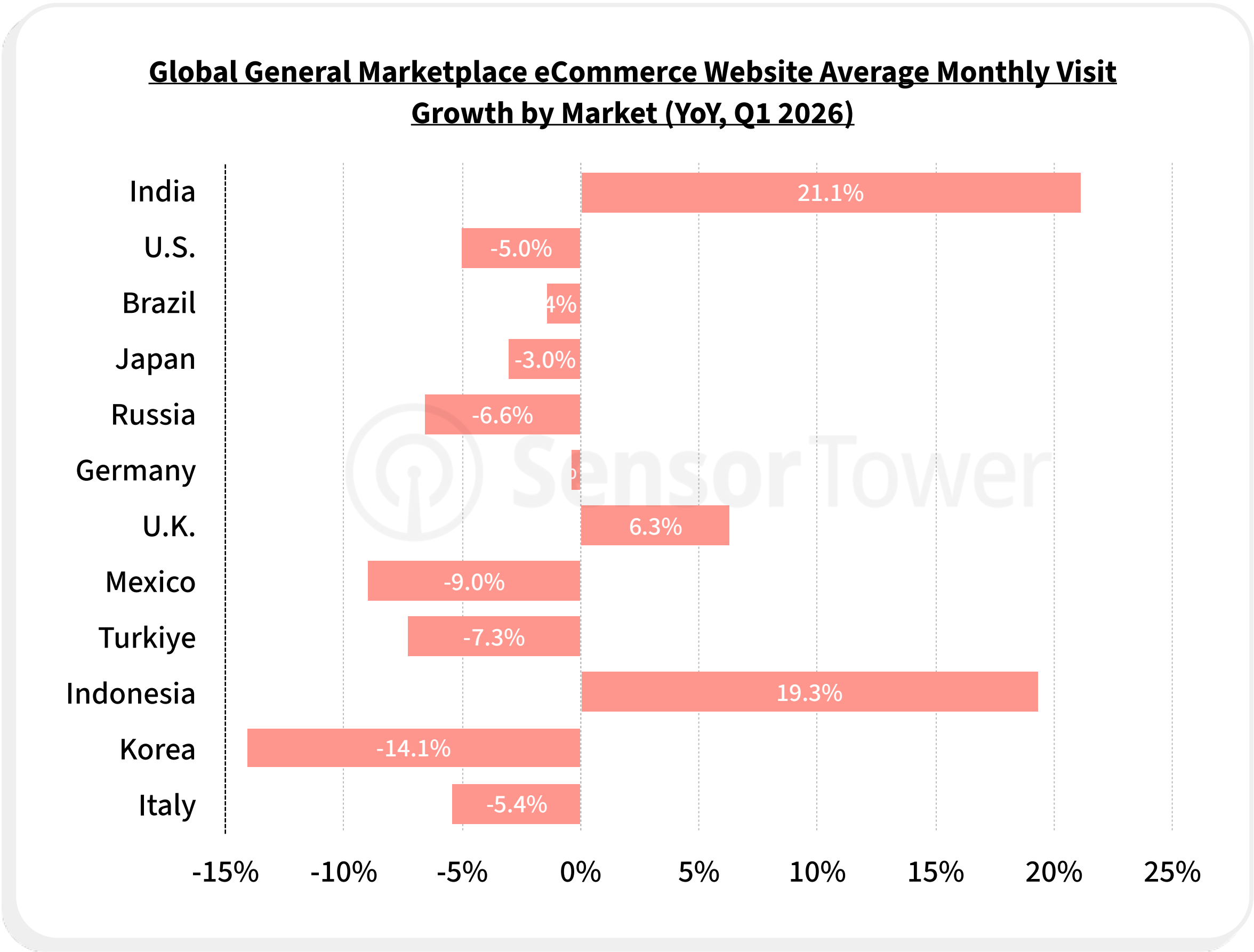
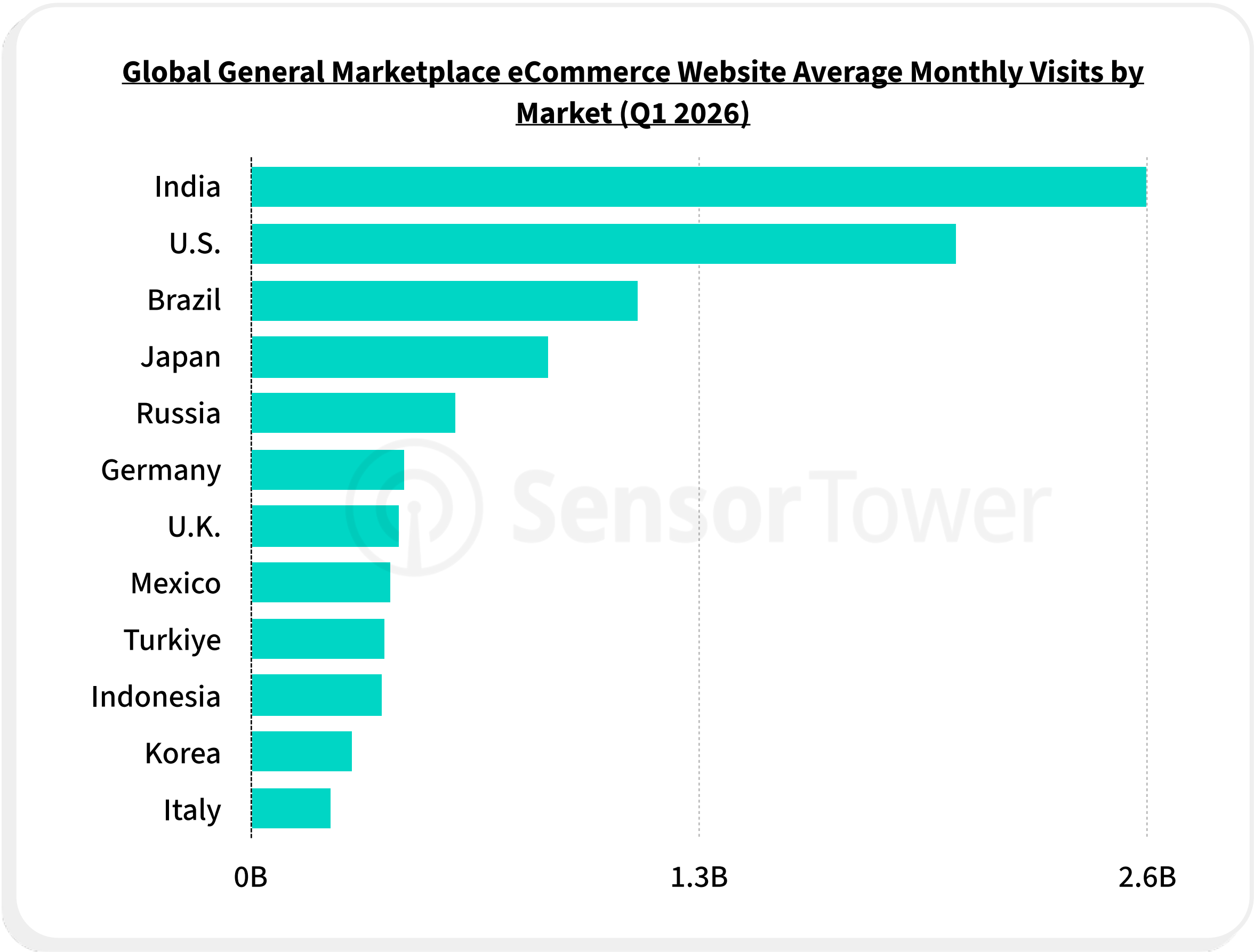
Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



In Q1 2026, global general marketplace eCommerce continued to undergo a structural shift. Mobile downloads declined year over year, signalling that user growth has peaked and the category is entering a more mature, competitive phase. In contrast, website unique visitors surged 10.9%, significantly outpacing mobile growth and emerging as a key source of new user acquisition. As a result, brands must rebalance channel investments – optimising engagement among existing users while strengthening the strategic role of the web as a critical customer acquisition gateway.

Global General Marketplace eCommerce: India and Indonesia Lead Website Traffic Growth

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



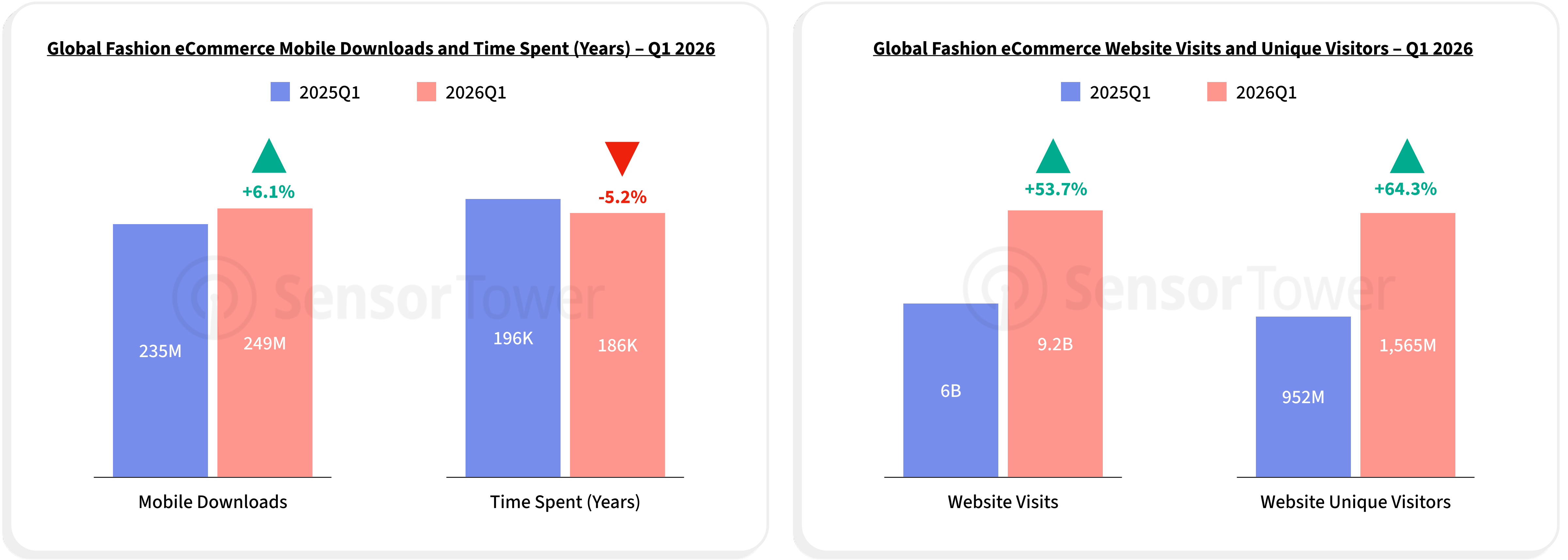
In Q1 2026, global general marketplace eCommerce website traffic showed clear market divergence. India not only led the world in average monthly visits, but also recorded the strongest growth at 21.1% year over year, making it a key driver of category expansion. Indonesia (+19.3%) and the United Kingdom (+6.3%) also posted notable gains. In contrast, several mature markets faced pressure, with website traffic declining in the United States (-5%), Japan (-3%) and South Korea (-14.1%). The results highlight a widening growth gap between emerging and mature markets.



Fashion eCommerce

Global Fashion eCommerce: Website Visits & Unique Visitors Surge 54% and 64% YoY

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



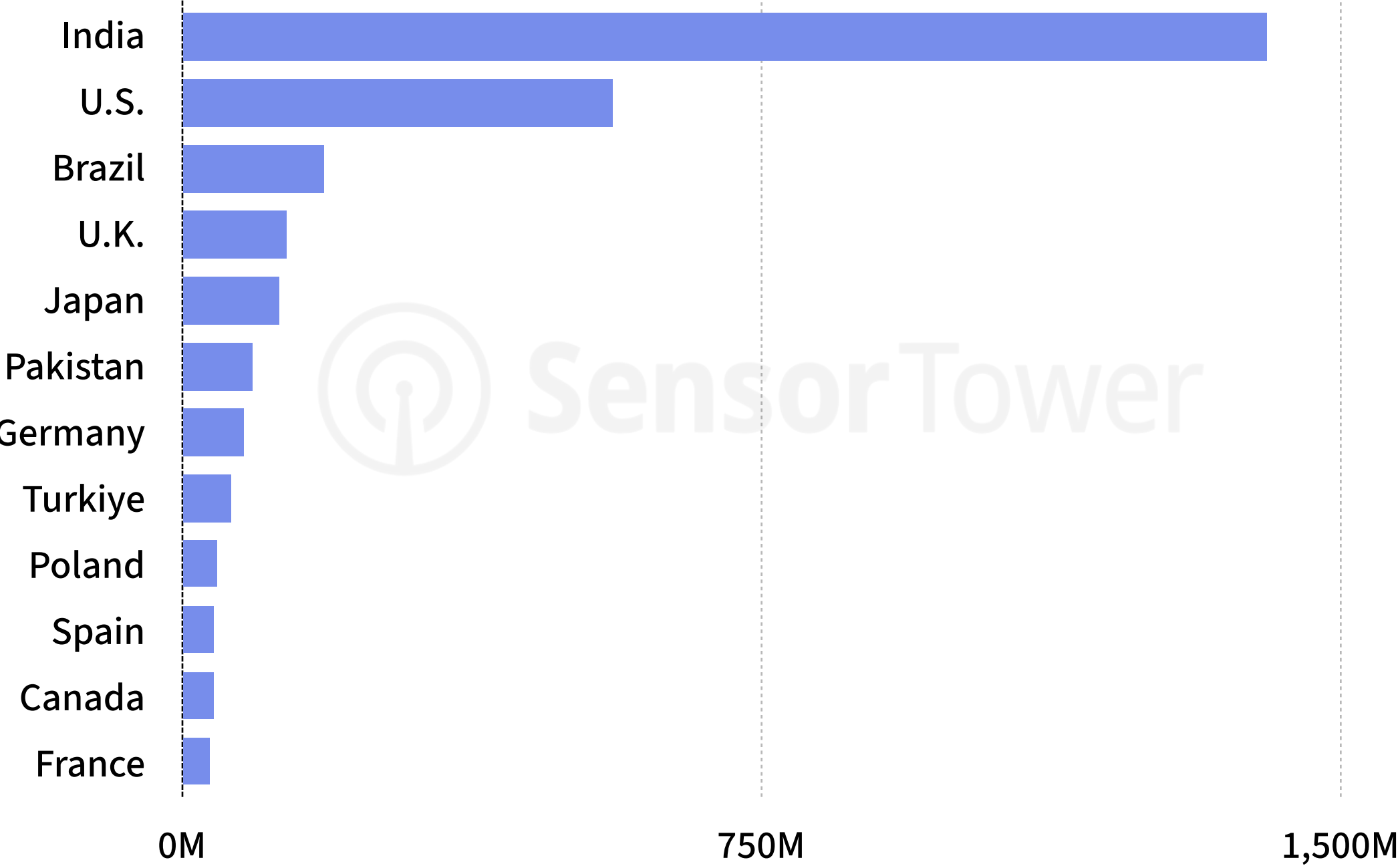
In Q1 2026, fashion eCommerce website visits and unique visitors both grew by more than 50% year over year, while mobile downloads increased but time spent declined. This suggests that consumers are increasingly shifting their decision-making journey to the web, with mobile apps no longer serving as the sole primary entry point.

For fashion brands, strengthening website experience and conversion capabilities has become a key lever for acquiring new users and driving overall business growth.

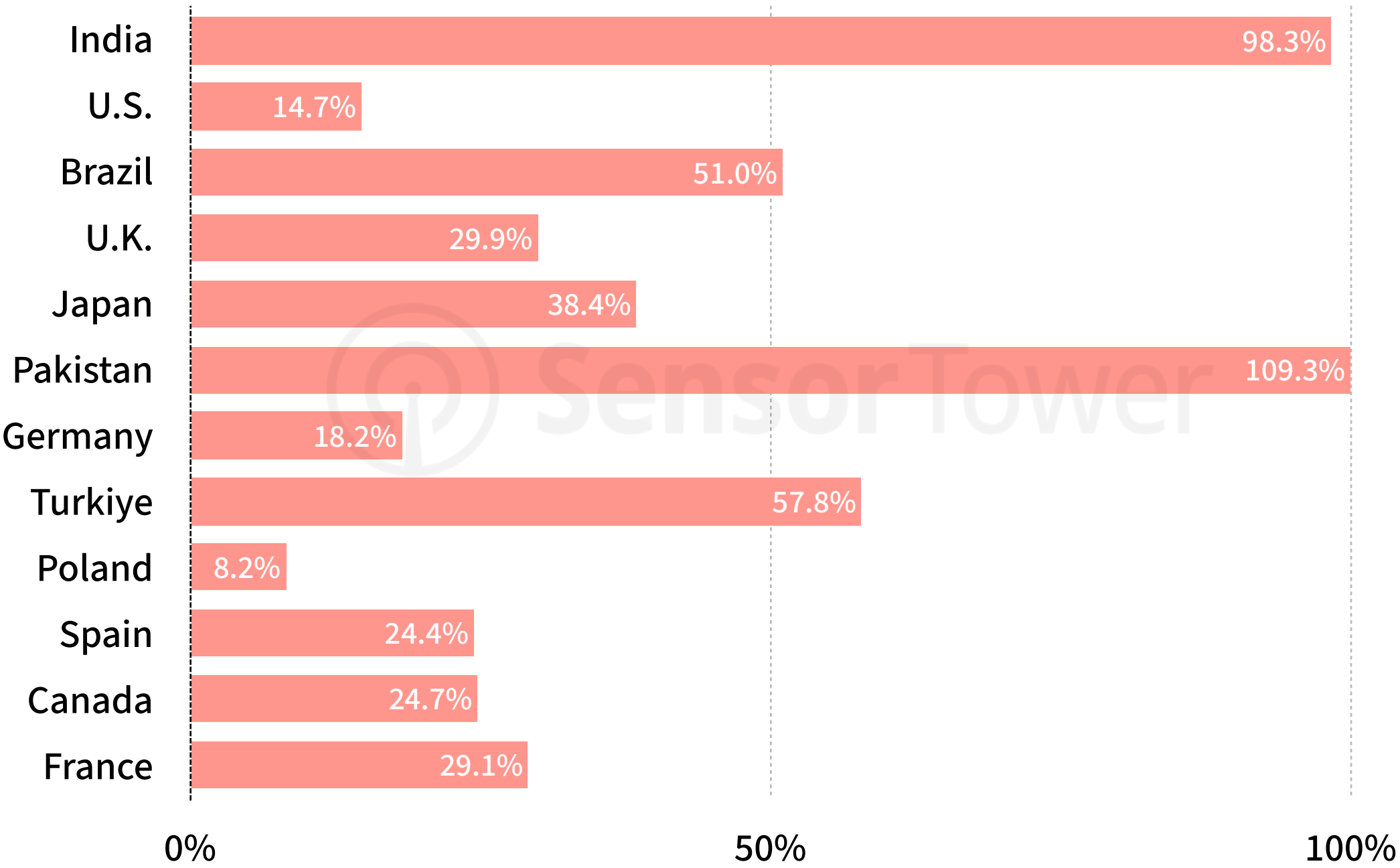
Global Fashion eCommerce: India Website Traffic Nearly Doubles as Leading Markets See Broad-Based Growth

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

Global Fashion eCommerce Website Average Monthly Visits by Market (Q1 2026)



Global Fashion eCommerce Website Average Monthly Visit Growth by Market (YoY, Q1 2026)

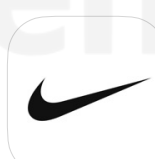
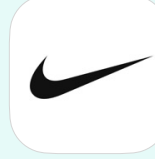


In Q1 2026, global fashion eCommerce website traffic increased across all major markets. India led globally with nearly 1.4 billion average monthly visits, maintaining a significant lead over other markets. Pakistan (+109.3%) and India (+98.3%) nearly doubled year over year, emerging as key drivers of category growth. Brazil (+51%) and Türkiye (+57.8%) also recorded strong gains, while all leading markets posted positive growth, highlighting the strong momentum of fashion eCommerce across both emerging and mature markets.

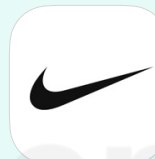
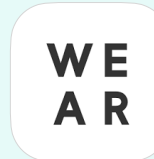
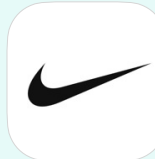
Leading Fashion eCommerce Platforms: SHEIN Ranks #1 Globally in Both Mobile MAU and Website Unique Visitors

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

Top 4 Fashion eCommerce Apps by MAU (Q1 2026)

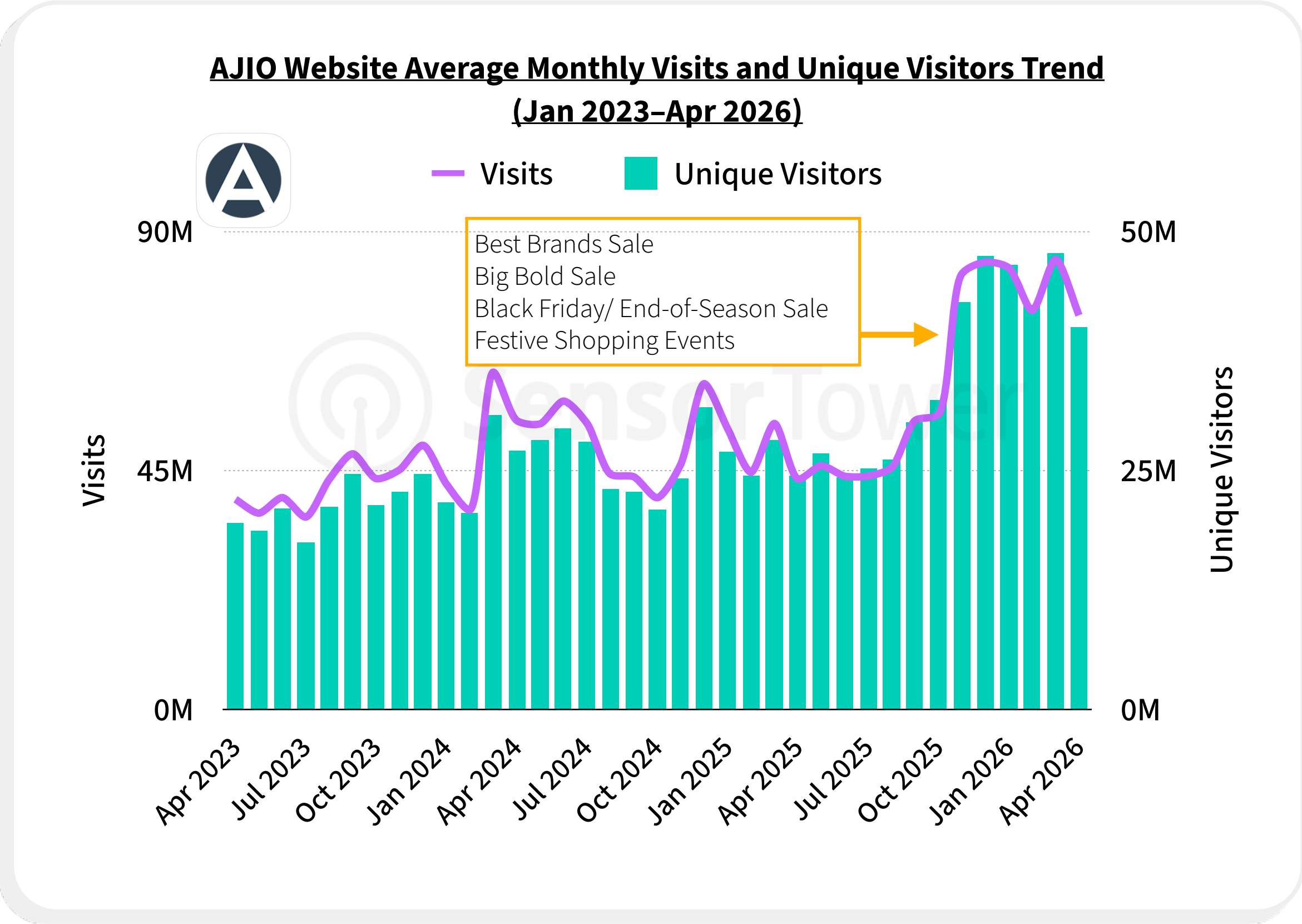
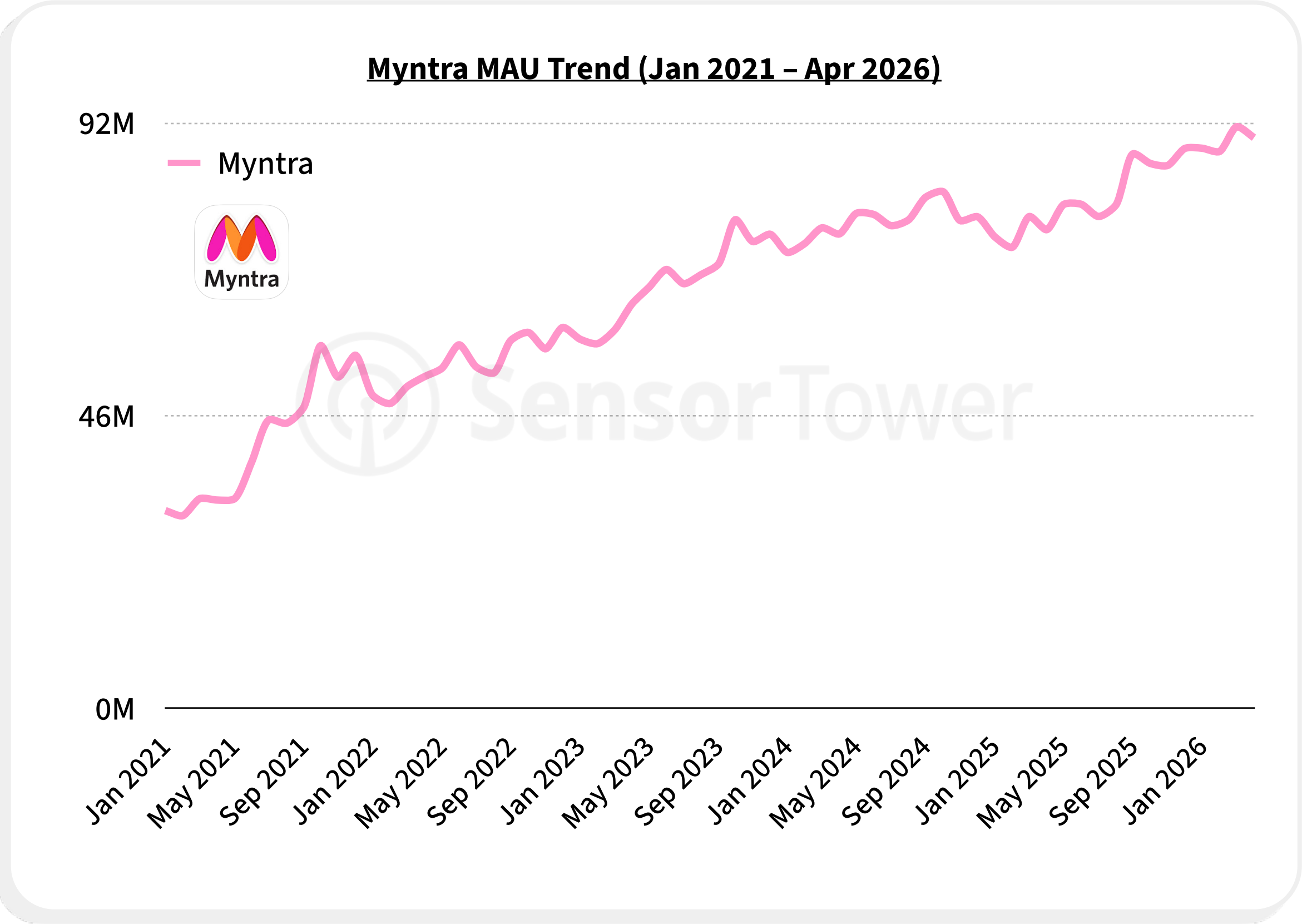
	Global	China iOS	Japan	Korea	India	Southeast Asia
1	 SHEIN Shein Group	 唯品会 Vipshop	 UNIQLO Fast Retailing	 MUSINSA MUSINSA	 Myntra Myntra	 SHEIN Shein Group
2	 Myntra Myntra	 得物 Poizon Holding	 GU GU.CO.	 ABLY ABLY	 AJIO Reliance Industries	 UNIQLO Fast Retailing
3	 AJIO Reliance Industries	 Nike Nike	 ZOZOTOWN ZOZO	 Queenit 라포랩스	 Nykaa Fashion Nykaa	 ZALORA Zalora
4	 Zalando Zalando	 Nike SNKRS Nike	 SHEIN Shein Group	 Zigzag Kakao Style	 Savana Urbanic	 Nike Nike

Top 4 Fashion eCommerce Websites by Unique Visitors (Q1 2026)

	Global	U.S.	Japan	Korea	India	Southeast Asia
1	 SHEIN shein.com	 SHEIN shein.com	 UNIQLO uniqlo.com	 MUSINSA musinsa.com	 Myntra myntra.com	 UNIQLO uniqlo.com
2	 Myntra myntra.com	 Nike nike.com	 ZOZOTOWN zozo.jp	 29CM 29cm.co.kr	 AJIO ajio.com	 SHEIN shein.com
3	 AJIO ajio.com	 Old Navy oldnavy.gap.com	 SHEIN shein.com	 KREAM kream.co.kr	 MP Activewear mp.com	 Adidas adidas.com
4	 Nike nike.com	 Quince quince.com	 WEAR wear.jp	 SHEIN shein.com	 Nykaa Fashion nykaafashion.com	 Nike nike.com

Fashion eCommerce in India: Myntra Mobile MAU Surpasses 90 Million, While Targeted Promotions Drive Rapid Growth in AJIO Website Traffic & Unique Visitors

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



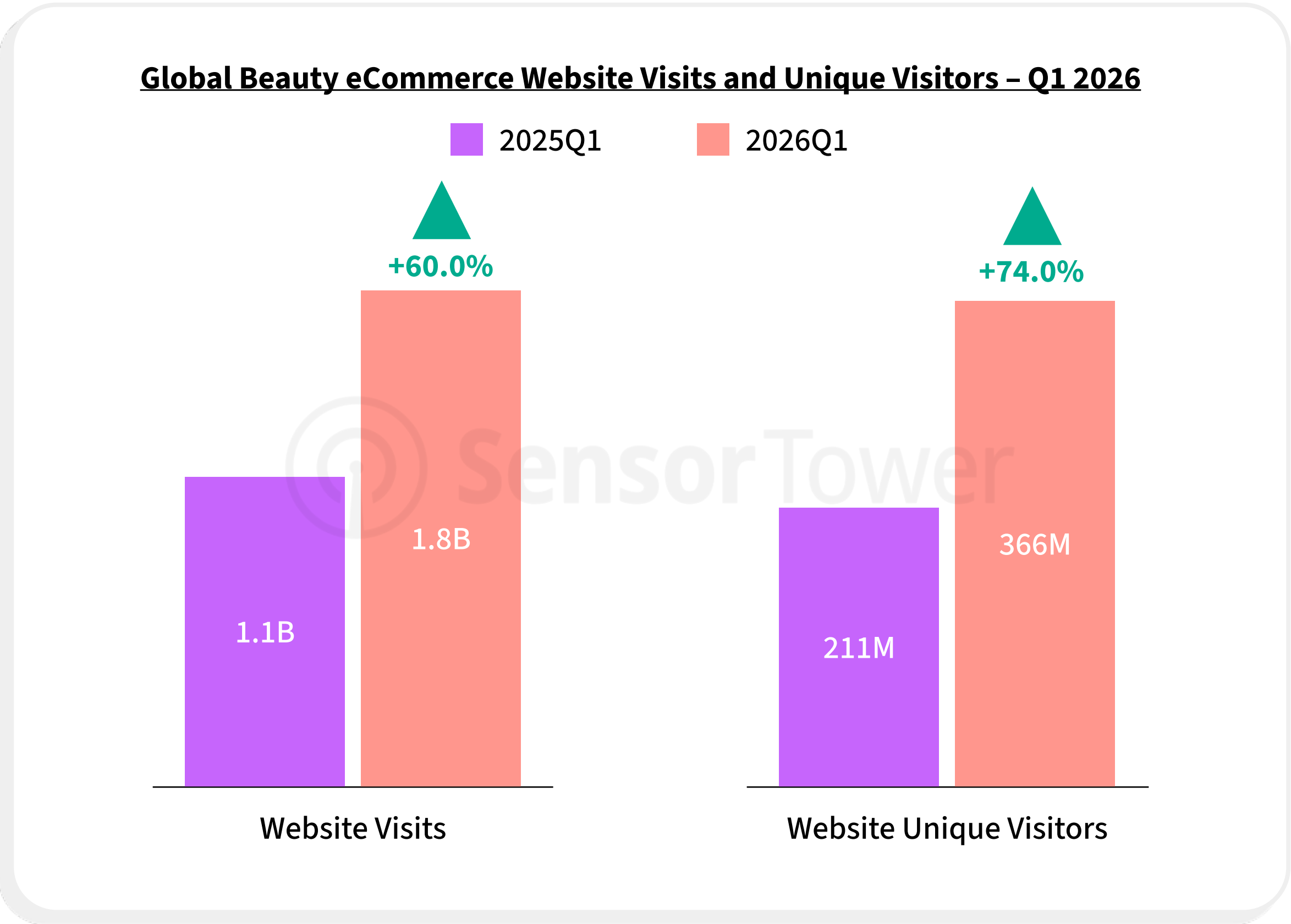
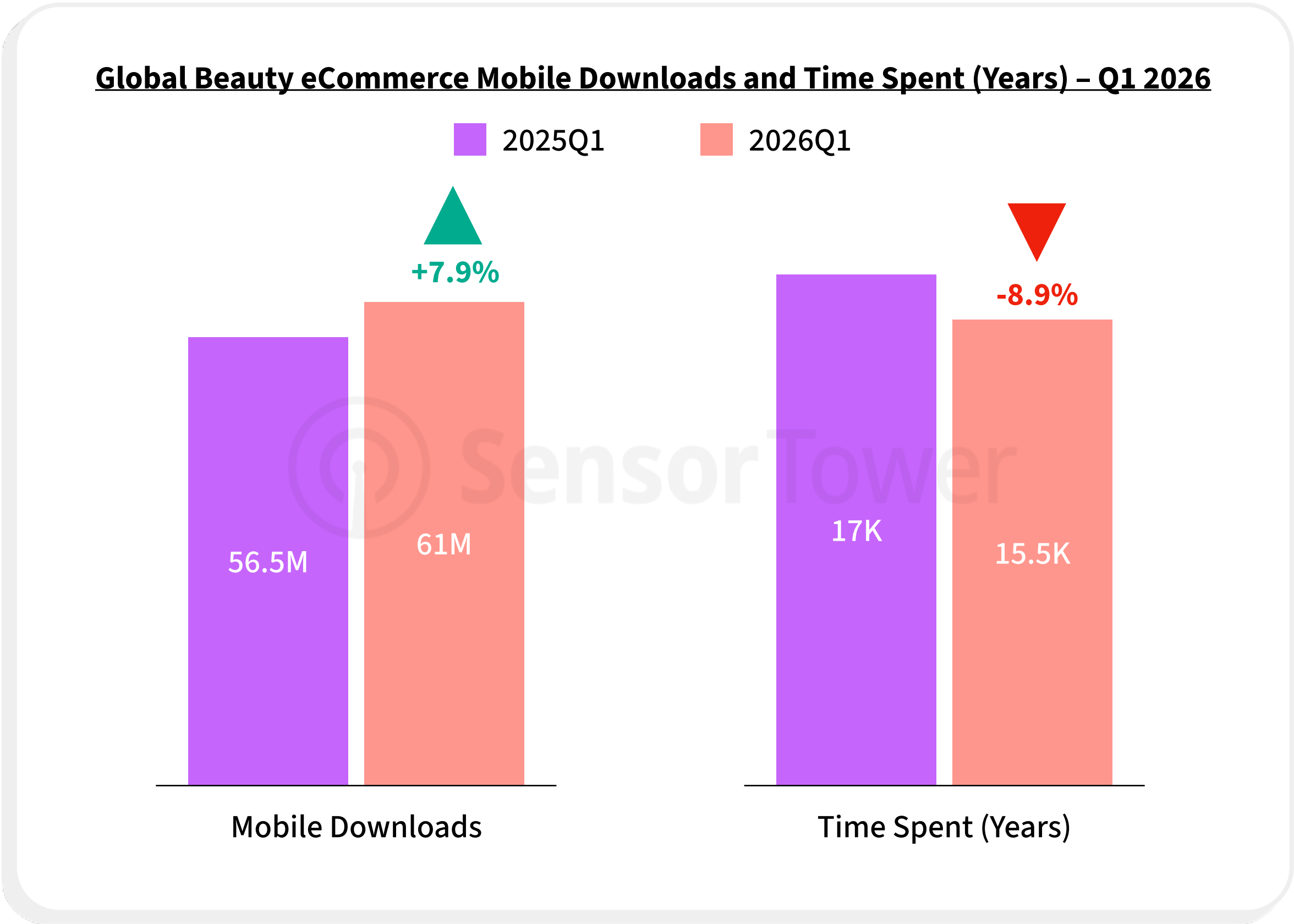
As India's leading fashion eCommerce platform, Myntra has continued to expand its user base across both mobile and web channels. Growth remained strong in 2026, with mobile MAU surpassing 90 million in March and reaching a new all-time high. Meanwhile, AJIO, the fashion eCommerce platform owned by Reliance Industries, leveraged its broader ecosystem and highly targeted promotional campaigns to accelerate website growth. In December 2025, both website visits and unique visitors reached record levels, increasing 37% and 50% year over year, respectively.



Beauty eCommerce

Global Beauty eCommerce: Website Visits and Unique Visitors Surge 60% and 74% YoY

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide. Website data includes beauty and personal care brands.

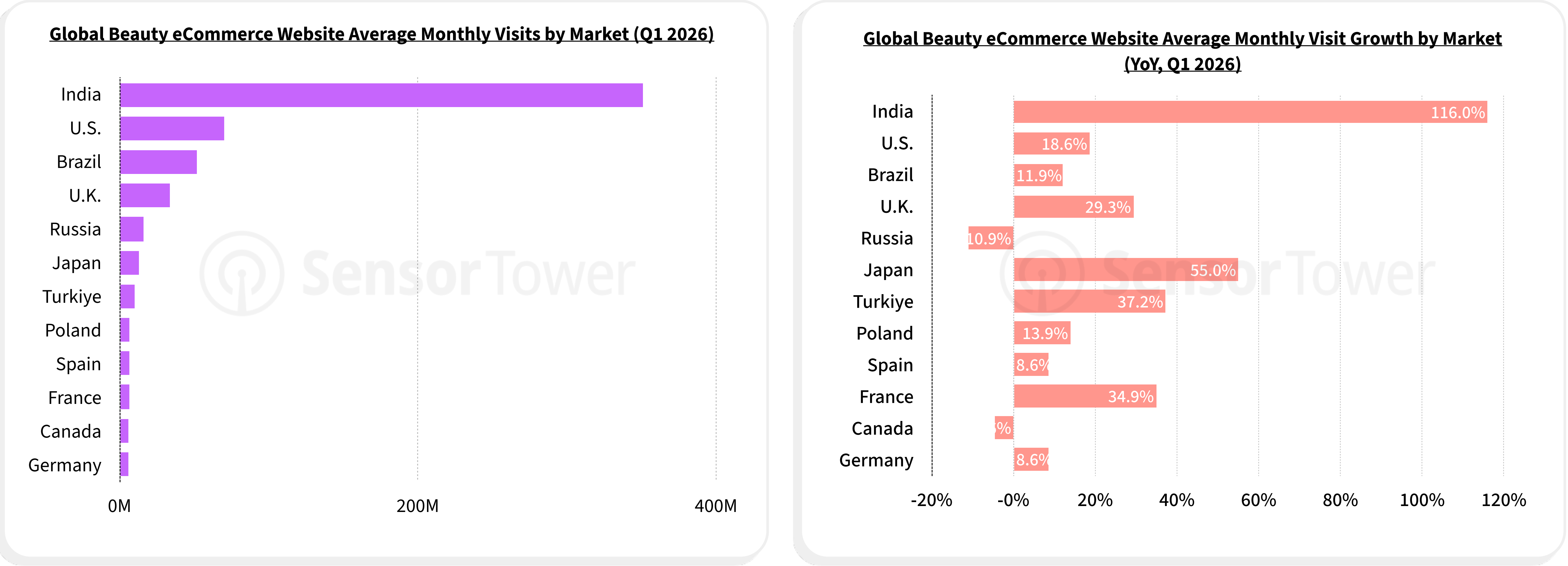


In Q1 2026, beauty eCommerce website visits and unique visitors both grew by more than 60% year over year, while mobile downloads increased modestly and time spent declined by nearly 9%. This suggests that consumers are increasingly shifting product discovery, comparison and purchase decision-making to the web.

For beauty brands, optimising owned web experiences and improving SEO and social-driven traffic acquisition have become critical strategies for attracting new users and driving overall business growth.

Global Beauty eCommerce: India Website Traffic Surges 116% YoY, While the UK, Japan and France Also Deliver Strong Growth

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

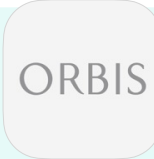


In Q1 2026, India led the global beauty eCommerce category in both scale and growth. Average monthly website visits approached 350 million, while traffic surged 116% year over year, making India the primary growth engine for the category. The United States and Brazil ranked second and third by traffic volume, respectively. Meanwhile, Japan (+55%), Türkiye (+37.2%) and France (+34.9%) also delivered strong growth, highlighting continued momentum across both emerging and mature beauty eCommerce markets.

Leading Beauty eCommerce Platforms: Nykaa Ranks #1 Globally in Both Beauty App MAU and Website Unique Visitors

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

Top 4 Beauty eCommerce Apps by MAU (Q1 2026)

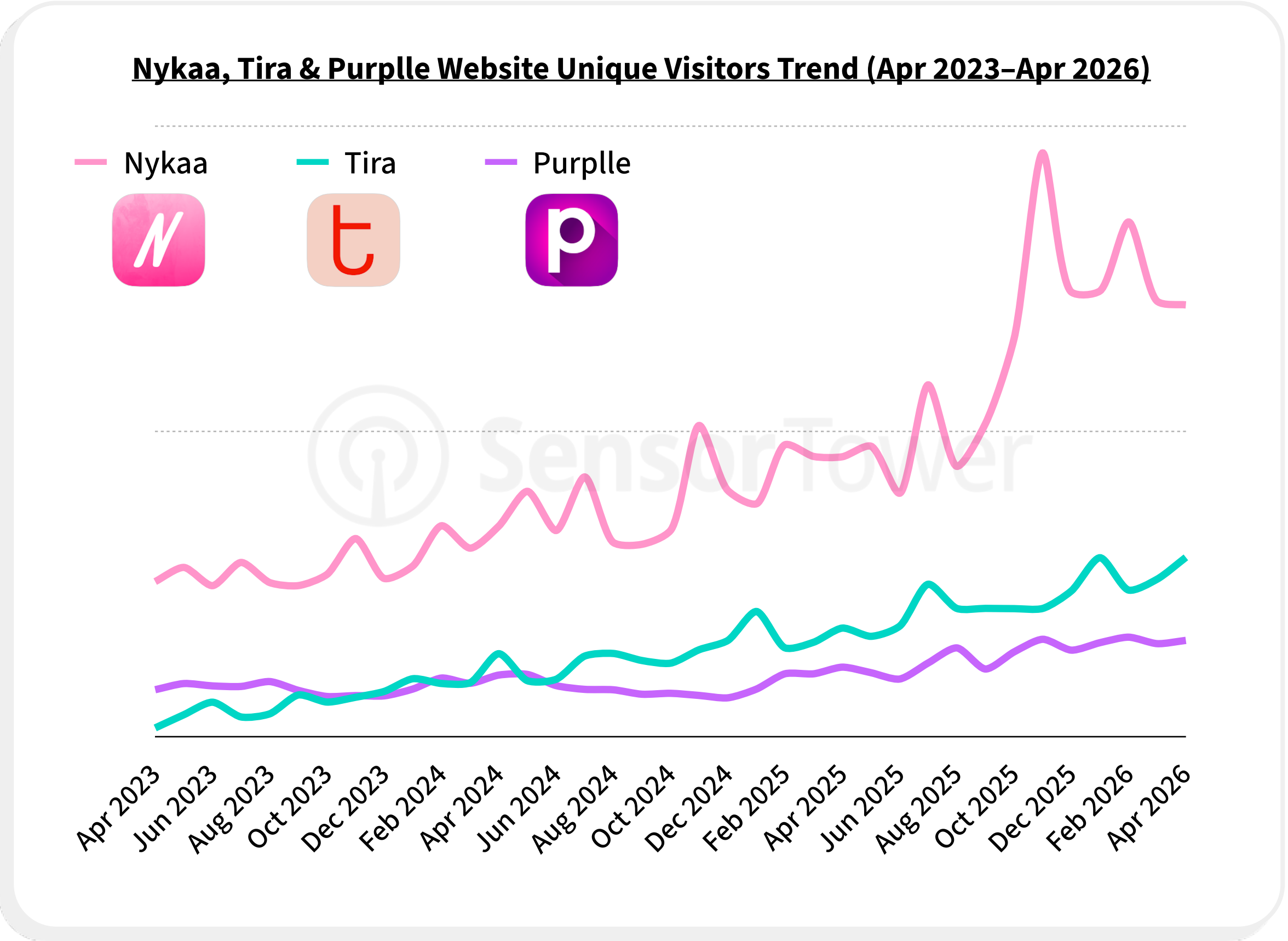
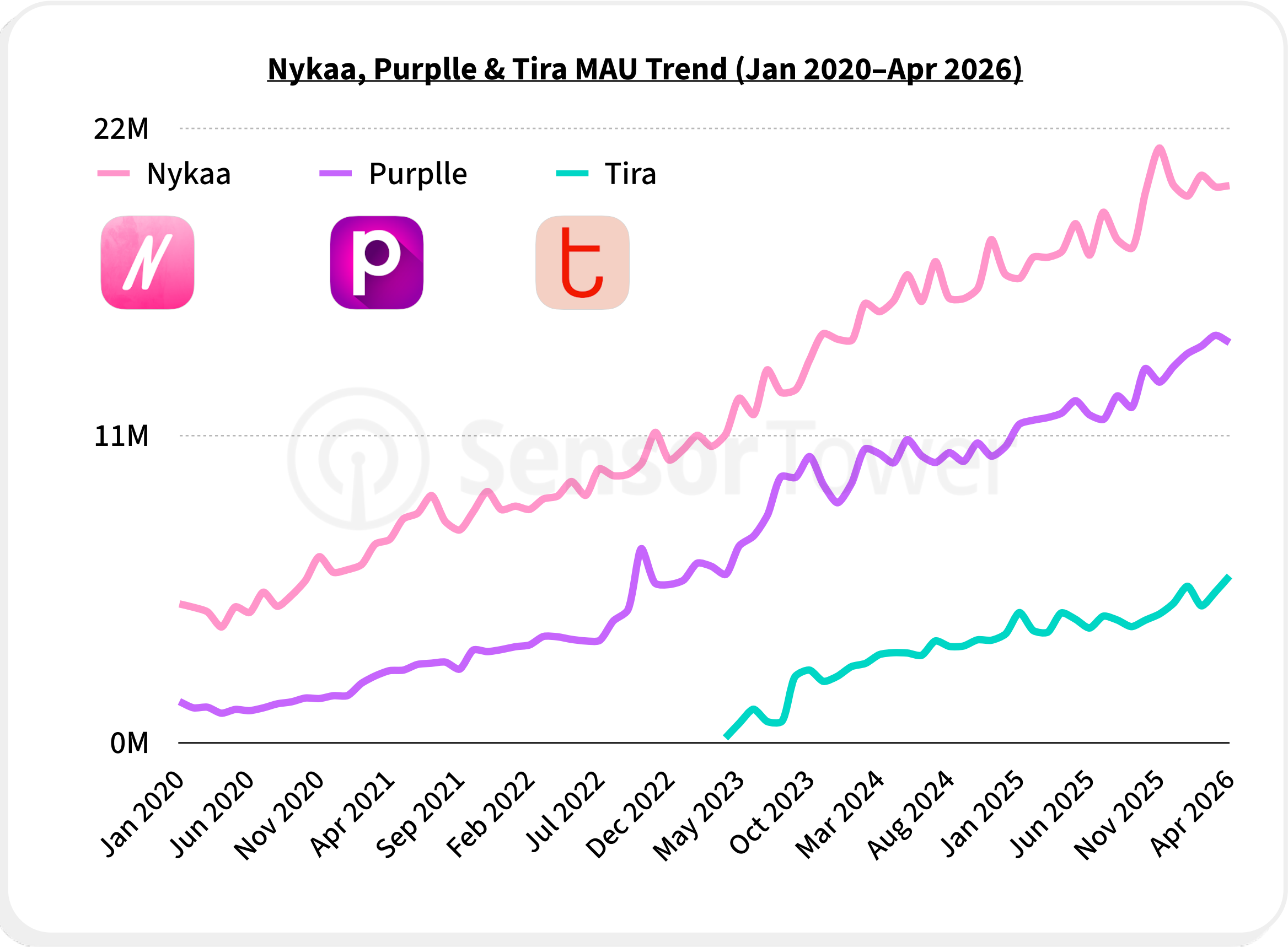
	Global	China iOS	Japan	Korea	India	Southeast Asia
1	 Nykaa Nykaa	 中免日上 中免日上互联科技	 Matsukiyo Cocokara Matsumoto Kiyoshi	 OLIVEYOUNG CJ Olive Young	 Nykaa Nykaa	 Watsons Watsons
2	 Rossmann Dirk Rossmann	 Sephora Sephora	 Beauty Key Shiseido	 Hwahae Hwahae Global	 Purplle Purplle	 Guardian MY DFMY
3	 Sephora Sephora	 OLIVEYOUNG CJ Olive Young	 @cosme istyle	 AMORE MALL AMOREPACIFIC	 Tira Reliance Industries	 Hasaki.vn Hasaki Spa & Beauty
4	 Mein dm dm-drogerie markt	 屈臣氏 Watsons	 ORBIS ORBIS	 Innisfree AMOREPACIFIC	 Nykaa Man Nykaa	 Sephora Sephora

Top 4 Beauty eCommerce Websites by Unique Visitors (Q1 2026)

	Global	U.S.	Japan	Korea	India	Southeast Asia
1	 Nykaa nykaa.com	 Ulta Beauty ulta.com	 Shiseido shiseido.com	 OLIVEYOUNG oliveyoung.co.kr	 Nykaa nykaa.com	 Hasaki.vn hasaki.vn
2	 Sephora sephora.com	 Sephora sephora.com	 MANARA manara.jp	 GONGSKIN gongskin.co.kr	 Tira tirabeauty.com	 Sephora sephora.com
3	 Tira tirabeauty.com	 Bath & Body Works bathandbodyworks.com	 CANMAKE canmake.com	 Mommycare mommy-care.co.kr	 Pilgrim discoverpilgrim.com	 Bath & Body Works bathandbodyworks.com
4	 Pilgrim discoverpilgrim.com	 SALLY BEAUTY sallybeauty.com	 HOYU hoyu.co.jp	 Medicube themedicube.co.kr	 Savana innovist.com	 Forte Series forteseries.com

Beauty eCommerce Platforms in India: Nykaa Leads Across Both App & Web Channels, Purplle Sustains Mobile Momentum, While Tira Rapidly Scales Its Web Audience

Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.



In India’s beauty eCommerce market, Nykaa, Purplle and Tira have continued to expand their audiences across both mobile and web. Nykaa leads the category with the largest user base across both channels, demonstrating strong performance throughout the customer journey. Purplle has maintained strong momentum on mobile, with MAU approaching 15 million in March 2026, while remaining focused on deepening engagement among app users. Although Tira entered the market later, it has steadily expanded across both channels by leveraging Reliance’s retail footprint and ecosystem traffic, with particularly strong growth on the web.

Case Study: Nykaa



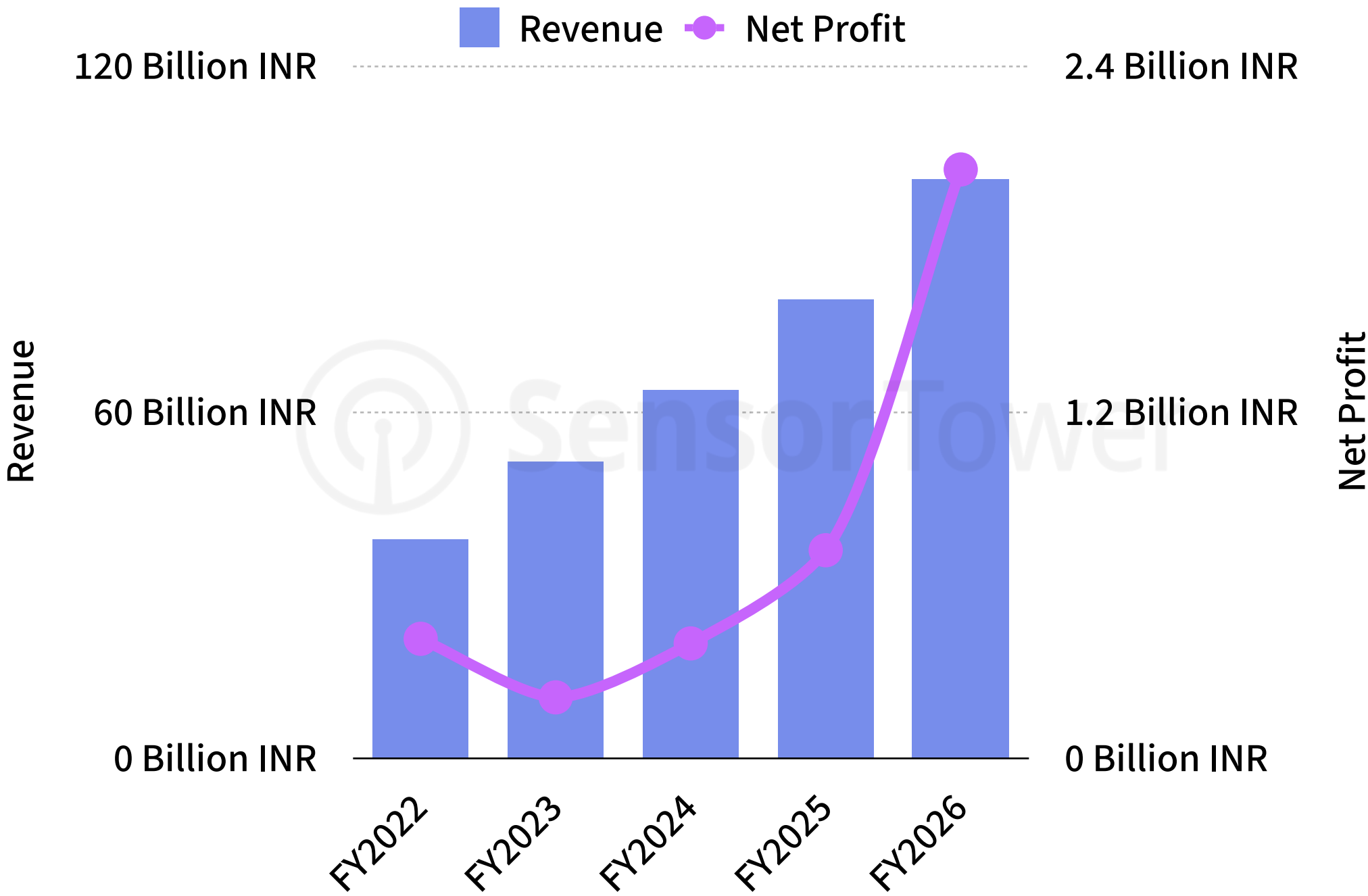


Nykaa FY2026 Revenue Surpasses INR 100 Billion, Net Profit Jumps 183%

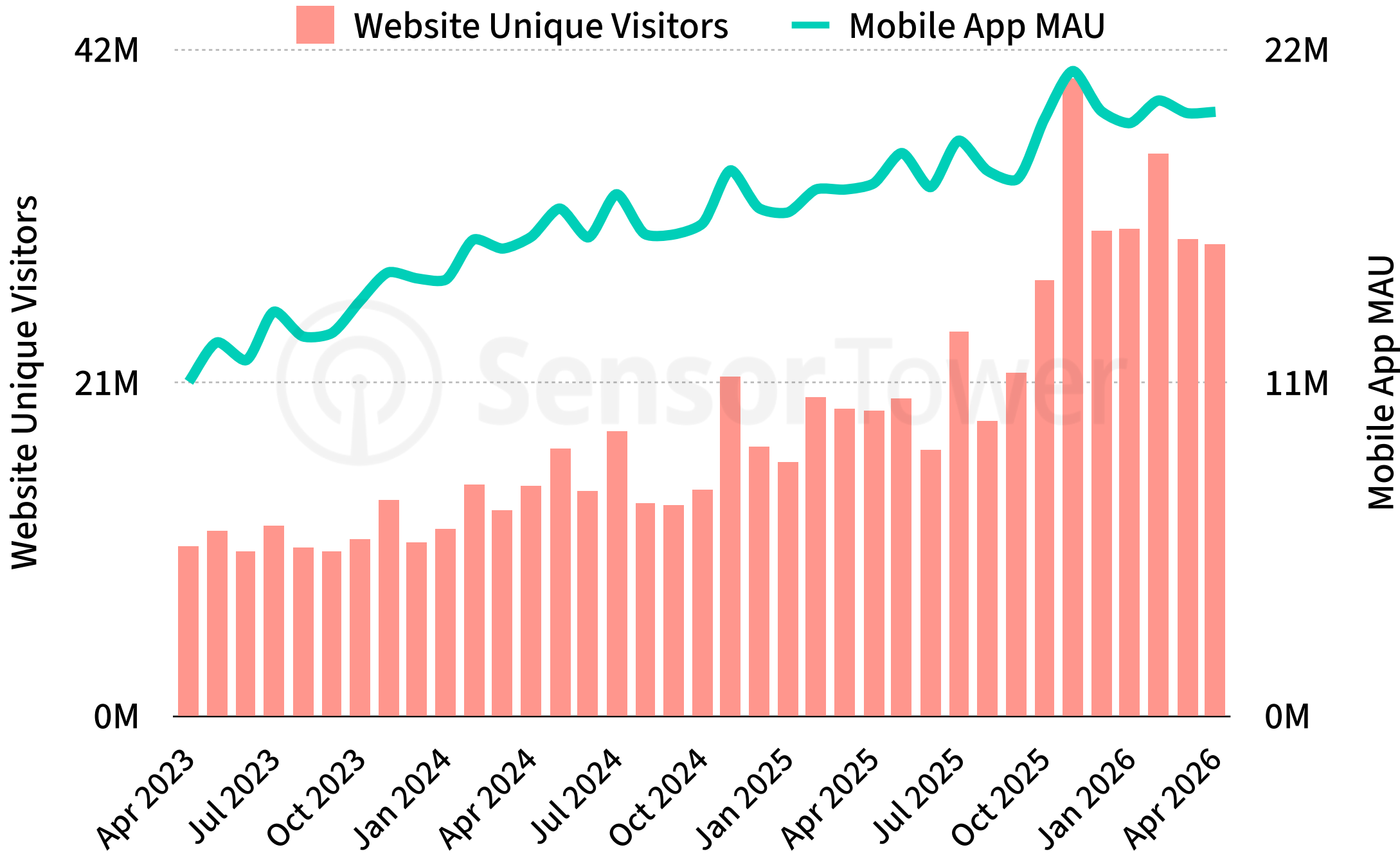
Source: Sensor Tower App Performance Insights & Web Insights

Nykaa is India's leading beauty e-commerce platform. Leveraging a three-engine growth model of omnichannel retail + content community + owned brands, it has become the dominant gateway for beauty brands entering India. According to company financials, Nykaa delivered strong revenue growth from FY2022 to FY2026, with FY2026 revenue surpassing INR 100 billion and net profit rising 183% YoY to INR 2.04 billion. Sensor Tower data shows that since April 2023, both Nykaa's website audience and mobile user base have continued to expand, reaching all-time highs in November 2025 with over 4 million website unique visitors and over 21 million mobile MAUs.

FY2022–FY2026 Nykaa Revenue and Net Profit Trend

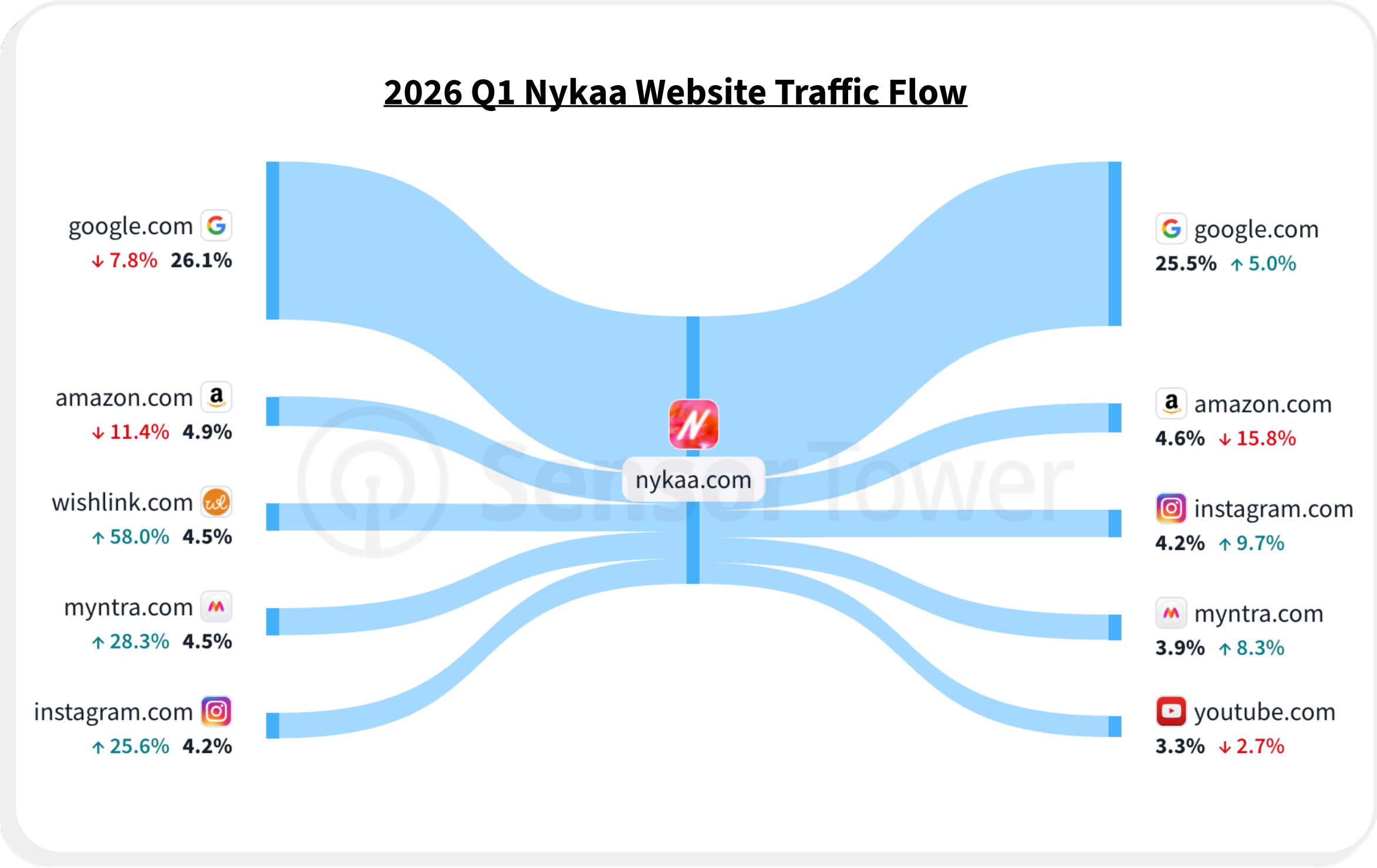
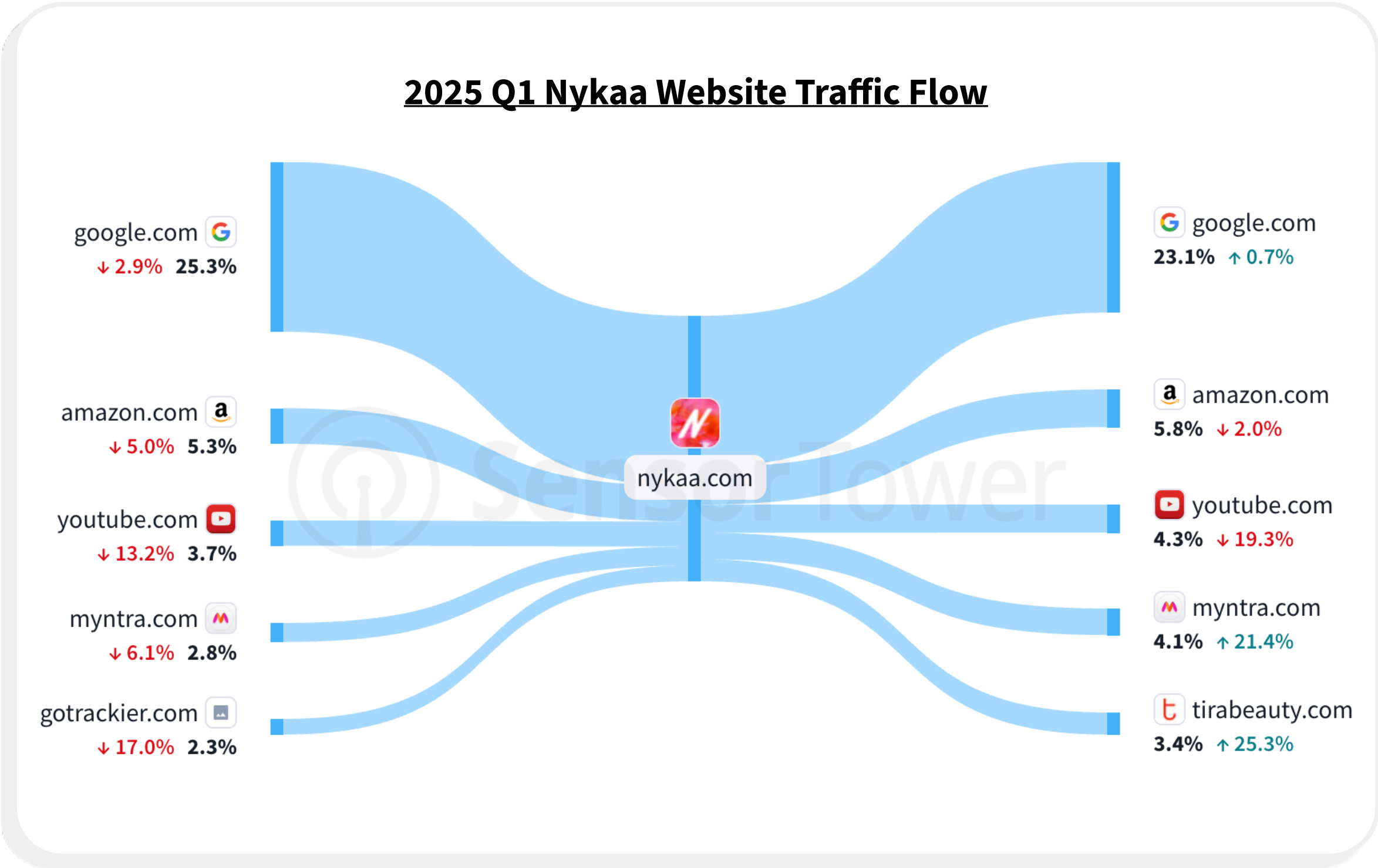


Nykaa Website Unique Visitors & Mobile MAU Trend



Creator Commerce and Social Platforms Become Nykaa's Fastest-Growing Traffic Sources

Source: Sensor Tower App Performance Insights & Web Insights



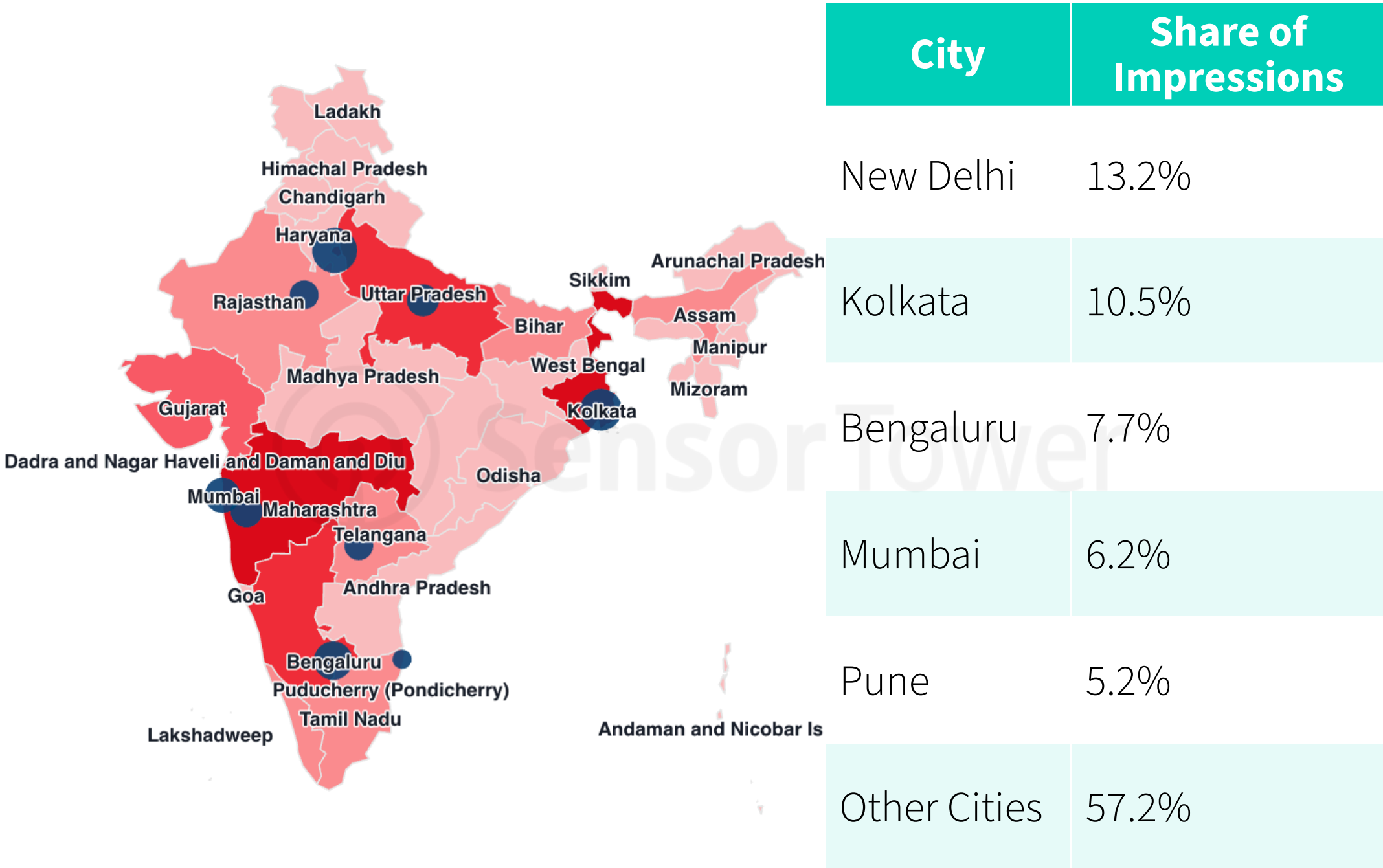
In Q1 2026, Wishlink (+58%) and Instagram (+25.6%) emerged as two of the fastest-growing referral sources to Nykaa's website, highlighting how a combination of content communities, affiliate creator marketing and social media seeding is becoming an increasingly important customer acquisition engine. Consumer discovery journeys are shifting from direct search to content-driven engagement. Traffic originating from Amazon declined by 11.4%, while traffic flowing from Nykaa to Amazon fell an even steeper 15.8%, suggesting that Nykaa's brand strength and user loyalty continue to improve, reducing reliance on third-party comparison and marketplace platforms.

At the same time, traffic referrals from Myntra increased 28.3%, while outbound traffic from Nykaa to Myntra also rose modestly, indicating growing audience overlap between the two platforms and a competitive landscape where both rivalry and traffic sharing coexist.

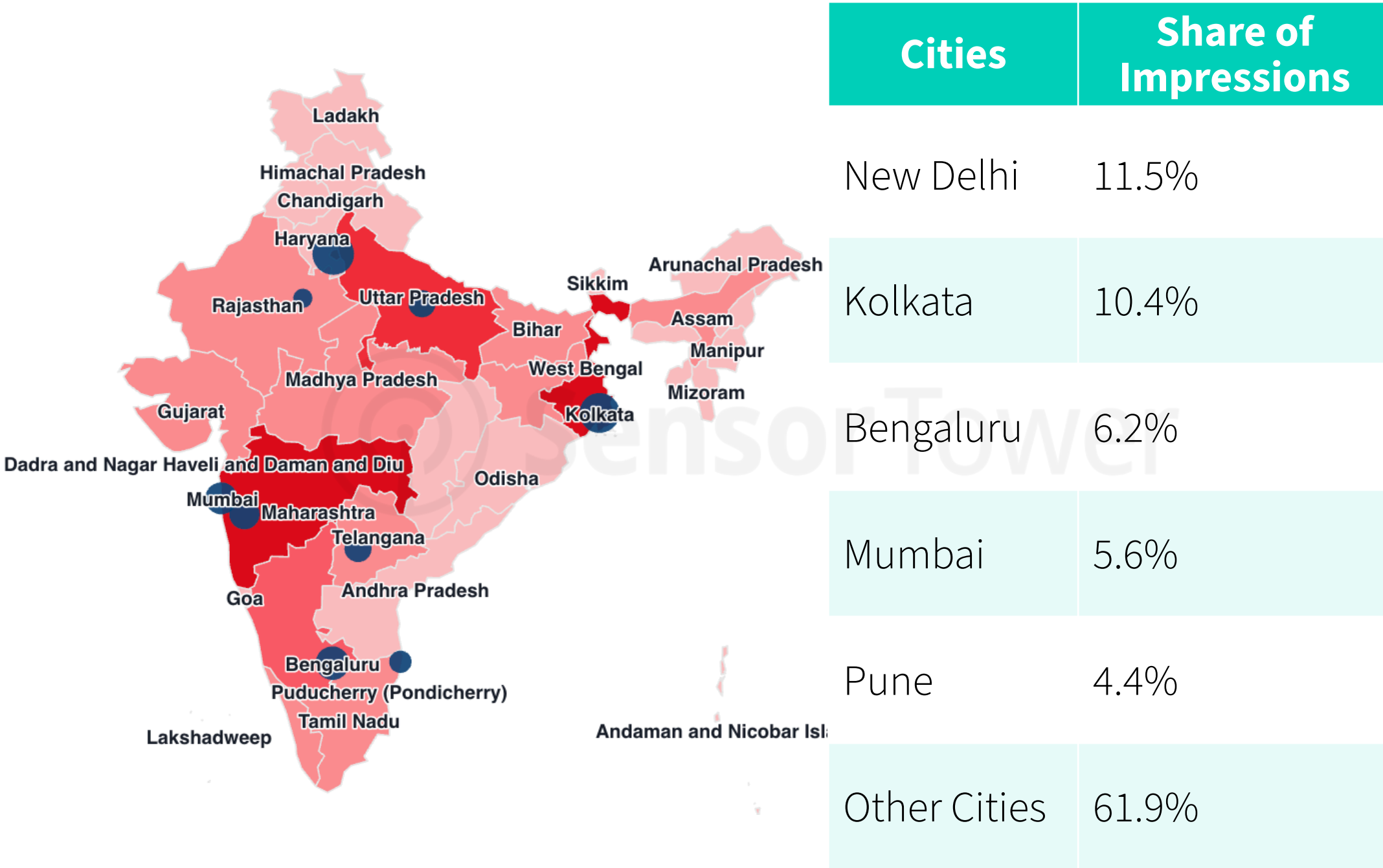
Nykaa Gradually Shifts Digital Advertising Spend Toward Tier 2, Tier 3 and Emerging Markets Across India

Source: Sensor Tower Pathmatics Digital Advertising Insights

2025 Q1 Nykaa Digital Ad Impression Distribution by Region



2026 Q1 Nykaa Digital Ad Impression Distribution by Region



In Q1 2026, Nykaa's share of digital ad impressions declined across India's five major Tier 1 cities—New Delhi, Kolkata, Bengaluru, Mumbai, and Pune – while the share attributed to other cities increased from 57.2% to 61.9%. This shift suggests that Nykaa is gradually reducing advertising investment in mature metropolitan markets and redirecting incremental spend toward Tier 2, Tier 3 and emerging regional markets, making geographic expansion beyond India's largest cities a key pillar of its 2026 marketing strategy.

Case Study: Olive Young

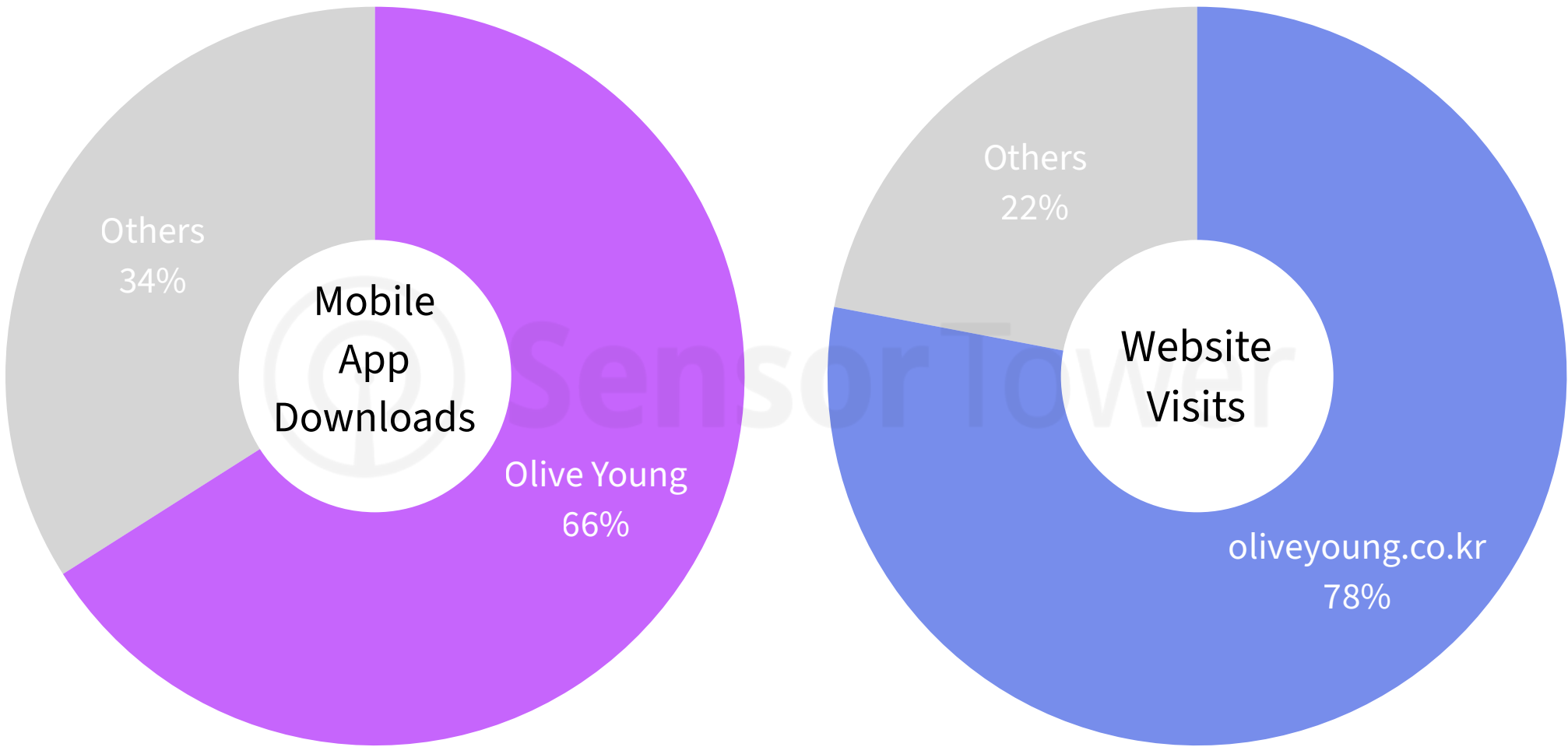


Olive Young Dominates South Korea's Beauty eCommerce Market, Reaching 13 Mn Cross-Platform Unique Users

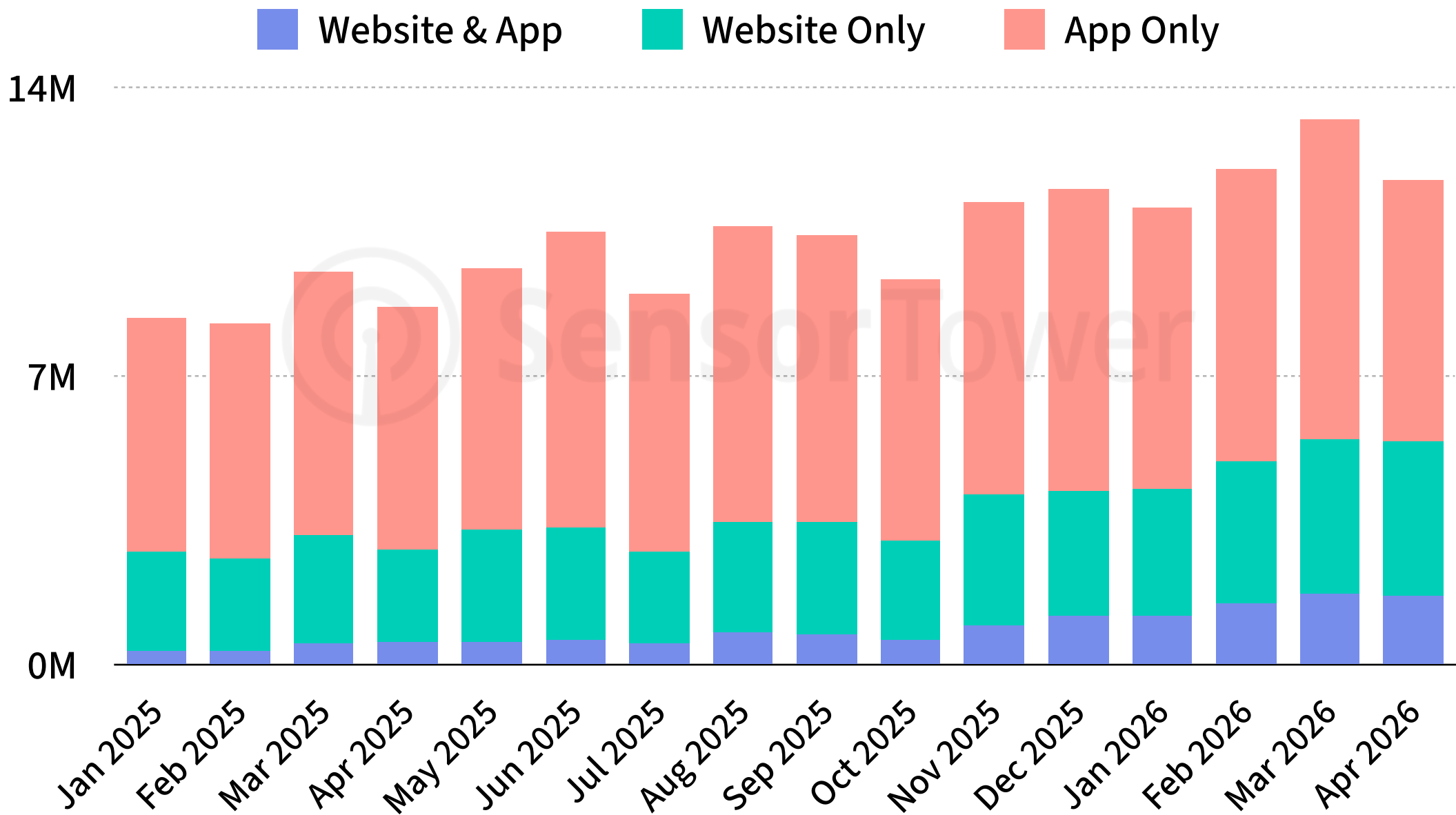
Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

Olive Young, CJ Group's leading health and beauty retailer, operates more than 1,360 stores across South Korea and generated over KRW 5.8 trillion in FY2025 revenue. According to Sensor Tower, Olive Young captured 66% of South Korea's beauty app downloads and 78% of beauty website traffic, firmly establishing itself as the country's leading beauty eCommerce platform. By March 2026, its cross-platform unique audience surpassed 13 million users, with 58.6% app-only users and 12.9% using both the app and website.

South Korea Beauty Market Share by App Downloads and Website Traffic
May 2025 – April 2026



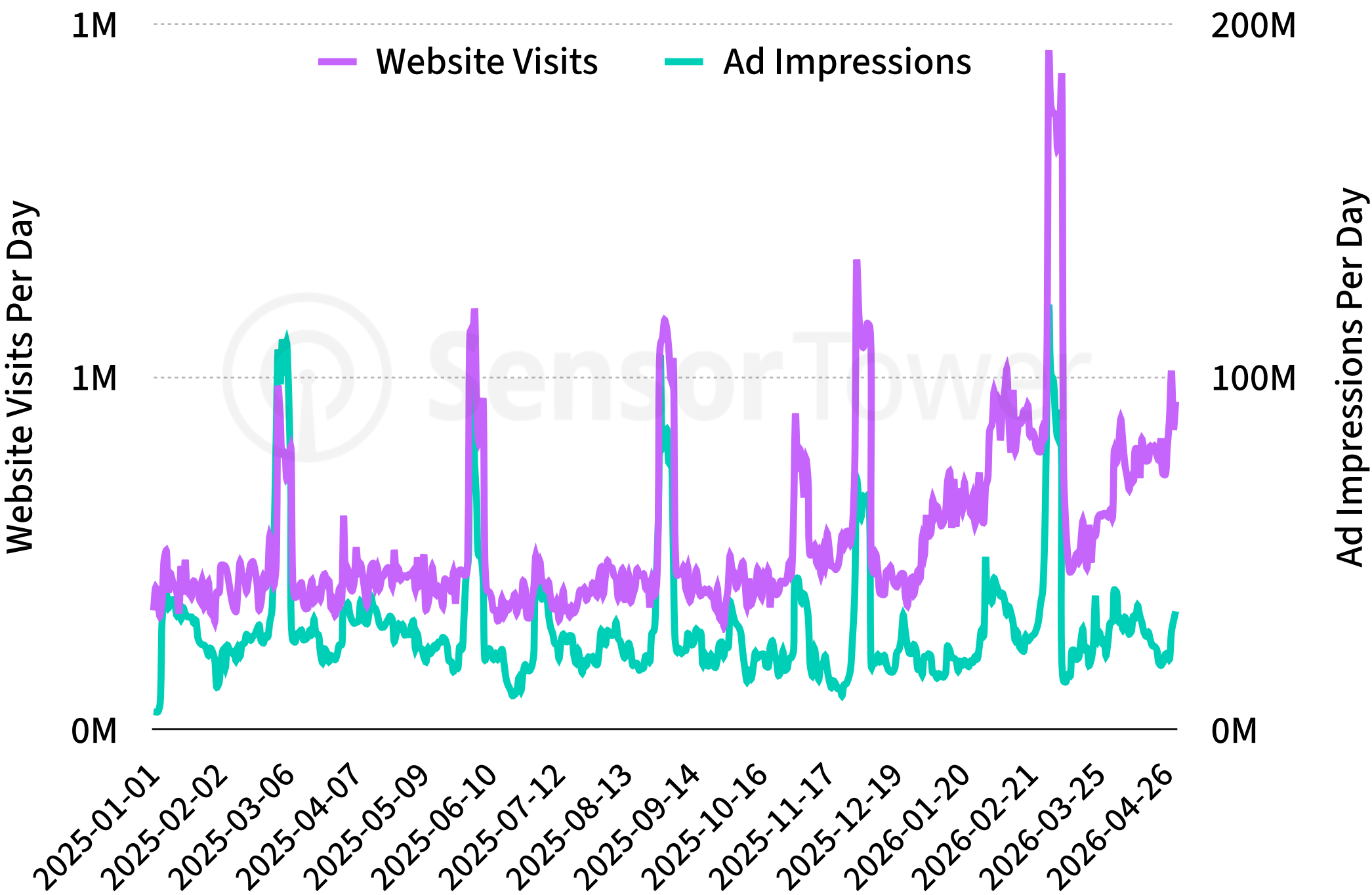
Olive Young Cross-Platform Audience Overlap Trend
January 2025 – April 2026



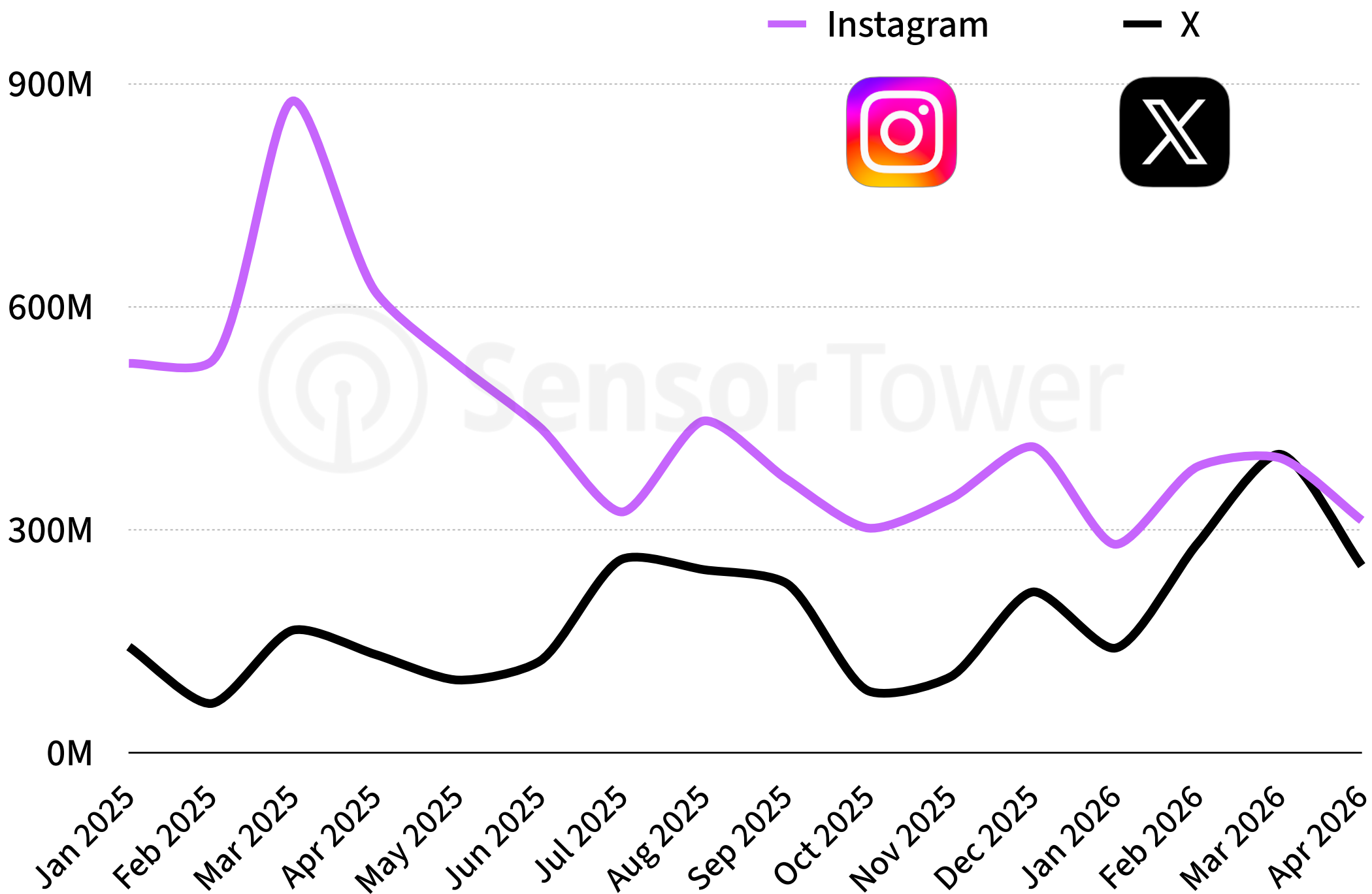
Seasonal Promotions and Advertising Campaigns Drive Rapid Growth in Olive Young's Website Traffic

Source: Sensor Tower Pathmatics Digital Advertising Insights and Web Insights

Olive Young Website Traffic & Digital Ad Impressions in Korea – Jan 2025 to Apr 2026



Olive Young Digital Ad Impression Trend on Instagram and X in Korea

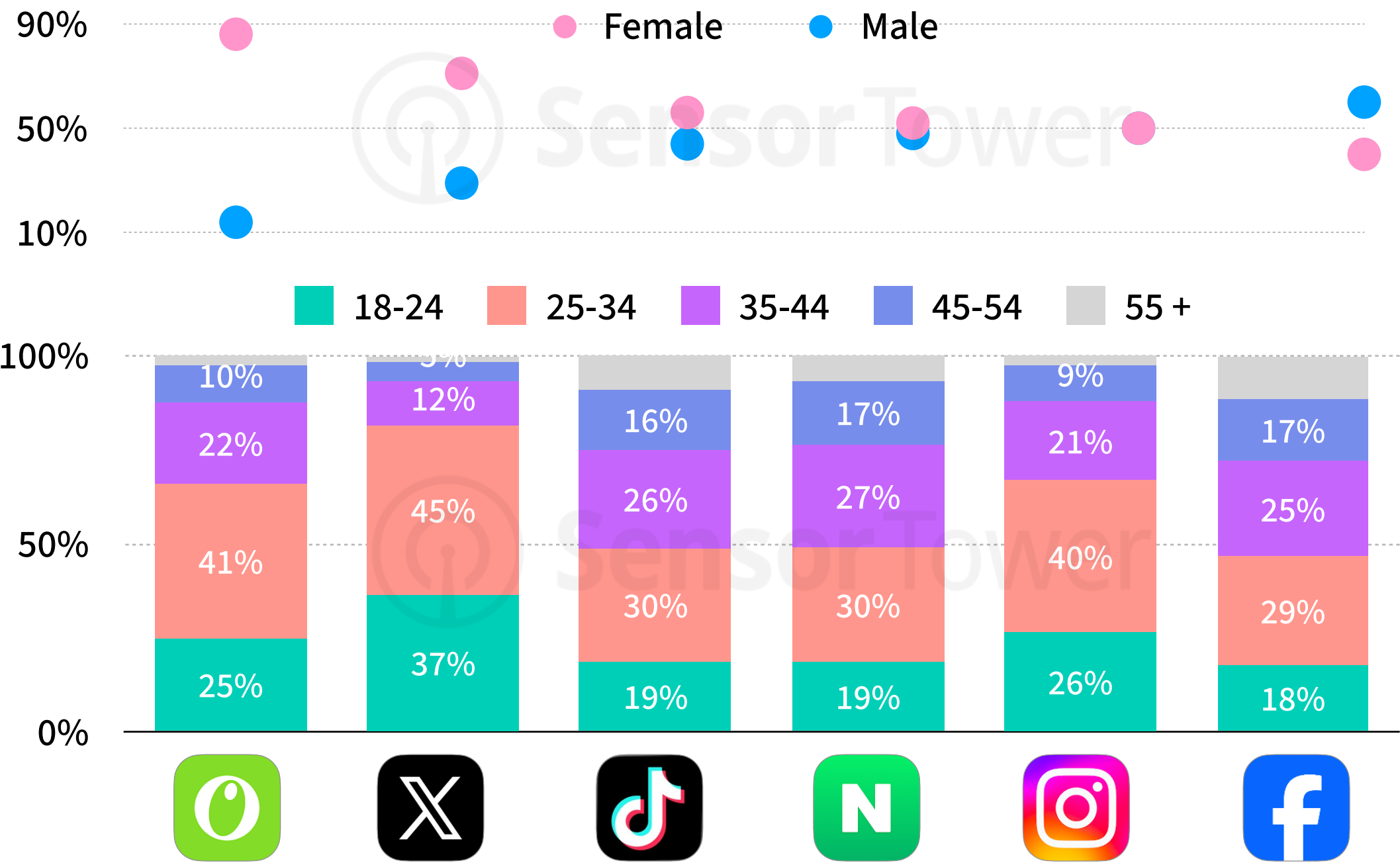


Olive Young regularly launches seasonal promotional campaigns in Mar, Jun, Sept and Dec, supported by increased digital advertising investment, which consistently drives spikes in website traffic. During Jan to Apr 2026, Instagram and X remained two of Olive Young's key advertising channels in Korea. Compared with the same period last year, Olive Young adjusted its media mix and significantly increased advertising activity on X, strengthening channel diversification and expanding its reach among Gen Z female consumers.

Audience Alignment: X Emerges as Olive Young's Key Growth Channel for Reaching Gen Z Women

Source: Sensor Tower Pathmatics Digital Advertising Insights and Audience Insights

2026 Q1 Olive Young and Major Social Platforms in Korea:
Gender and Age Distribution



Top-Performing Olive Young Ad Creatives on X (2026 Q1)



In Korea, women account for 86% of Olive Young's mobile audience, while users aged 18–34 make up 66%. Among major social platforms, X shows the strongest audience alignment with Olive Young, with 71% female users and 37% aged 18–24 – the highest Gen Z concentration across key social channels. In Q1 2026, Olive Young launched an exclusive IP collaboration with Mangomee (Manggeureojin Gom) to engage this audience, pairing them with “daily healing” and “self-care” messaging that resonated strongly with its core demographic of women aged 18–34.

Case Study: Uniqlo



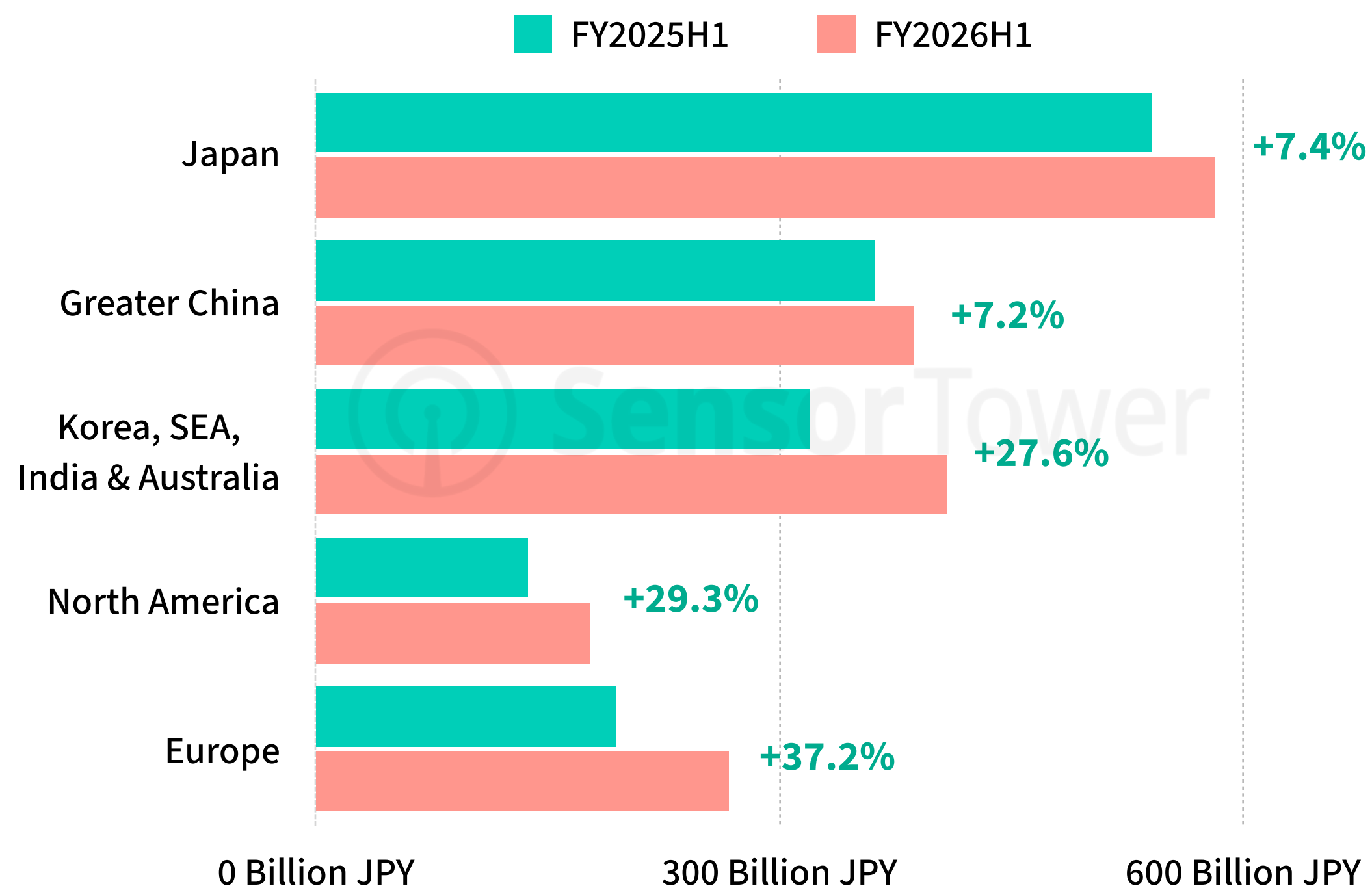


UNIQLO Sees Strong Growth Outside Japan Across Europe, the U.S., Korea & SEA

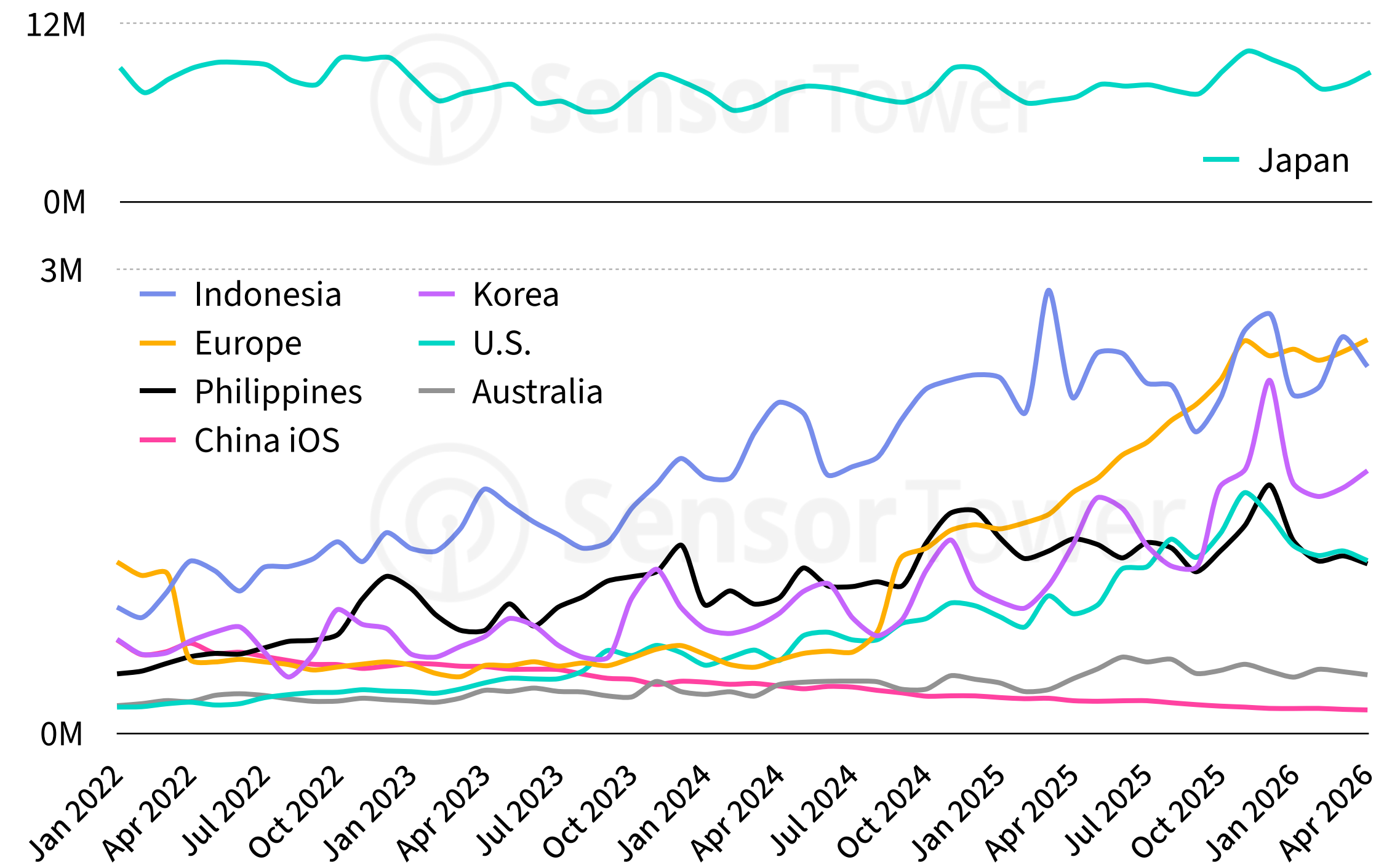
Source: Sensor Tower App Performance Insights & Web Insights. Note: Website Visits and Unique Visitors include both desktop and mobile web traffic across 56 available markets worldwide.

UNIQLO, the global apparel retailer under Fast Retailing, is built around its LifeWear philosophy, offering high-quality everyday essentials at accessible prices. According to company filings, during FY2026 H1, UNIQLO delivered particularly strong growth outside Japan, with revenue increasing 37% in Europe, 29% in North America, and 28% across Asia (excluding Japan and Greater China). Sensor Tower data further shows that between January 2022 and April 2026, UNIQLO's mobile user base continued to expand across Europe, Indonesia, South Korea, and the United States, while maintaining a stable presence in its home market of Japan.

UNIQLO Revenue by Market – 2026 H1 [Source]

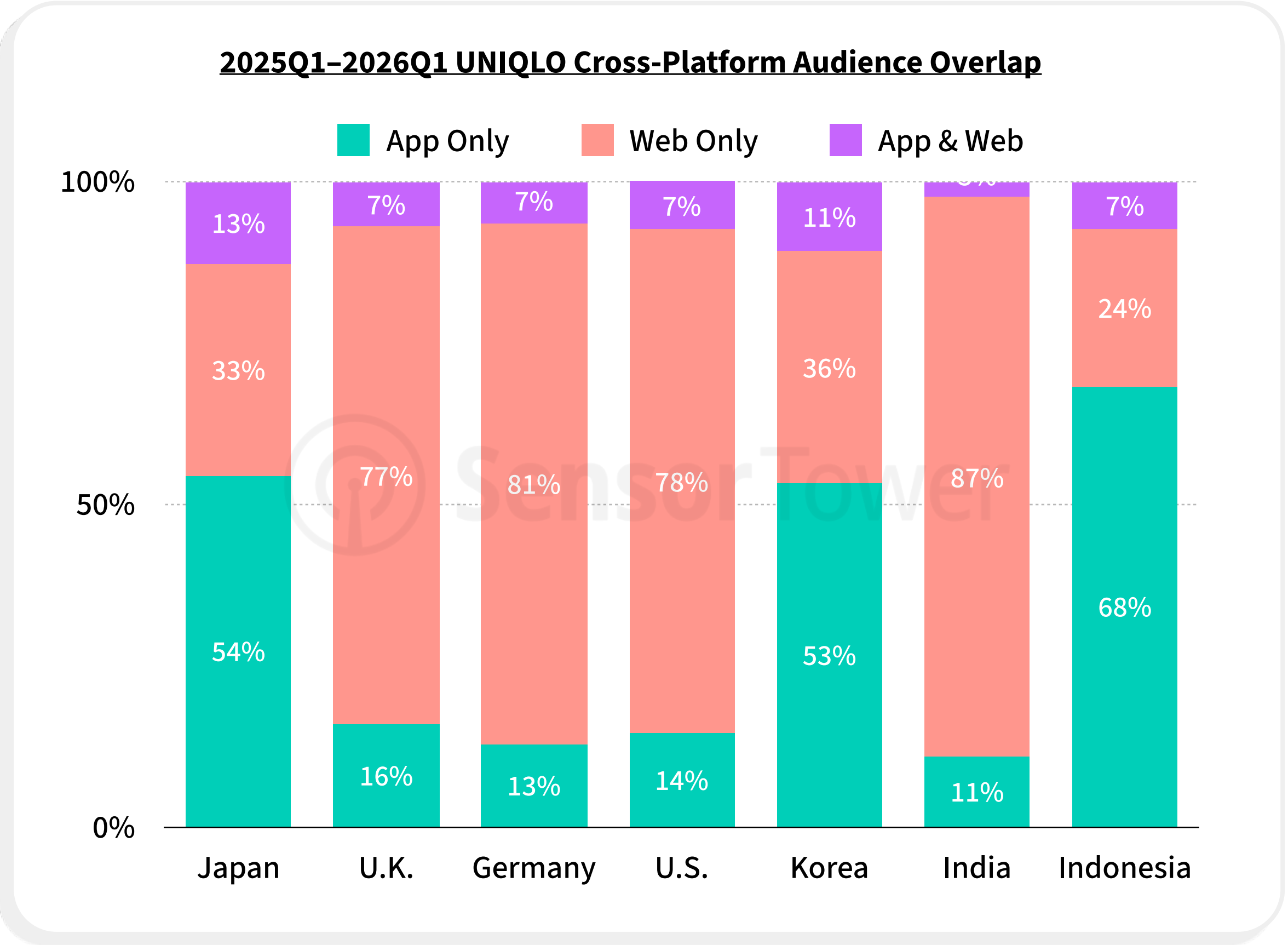
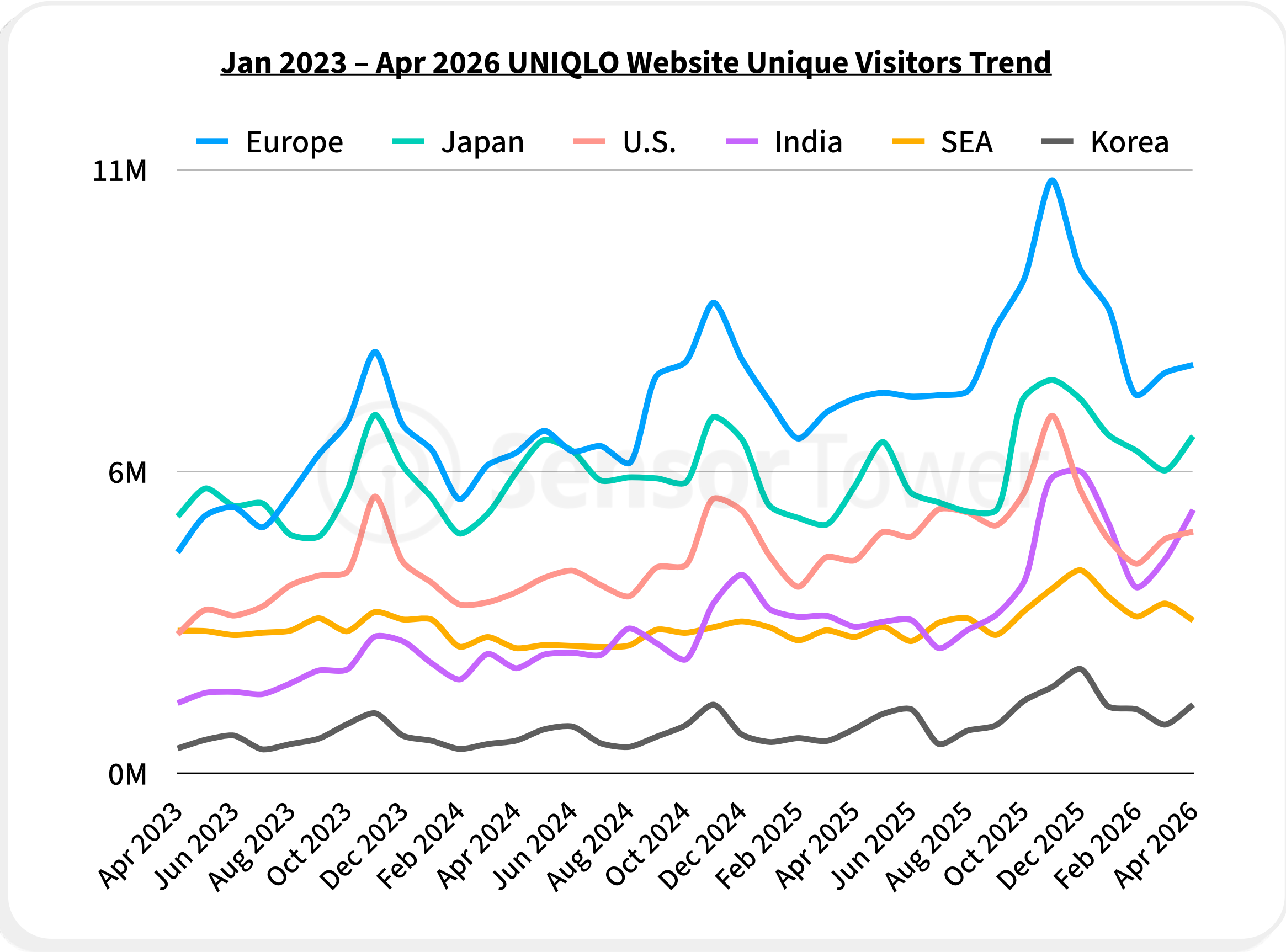


UNIQLO Mobile MAU Trend – Jan 2022 to Apr 2026



UNIQLO: Website Unique Visitors Surge Across Europe and the U.S., with Web Remaining the Core User Touchpoint

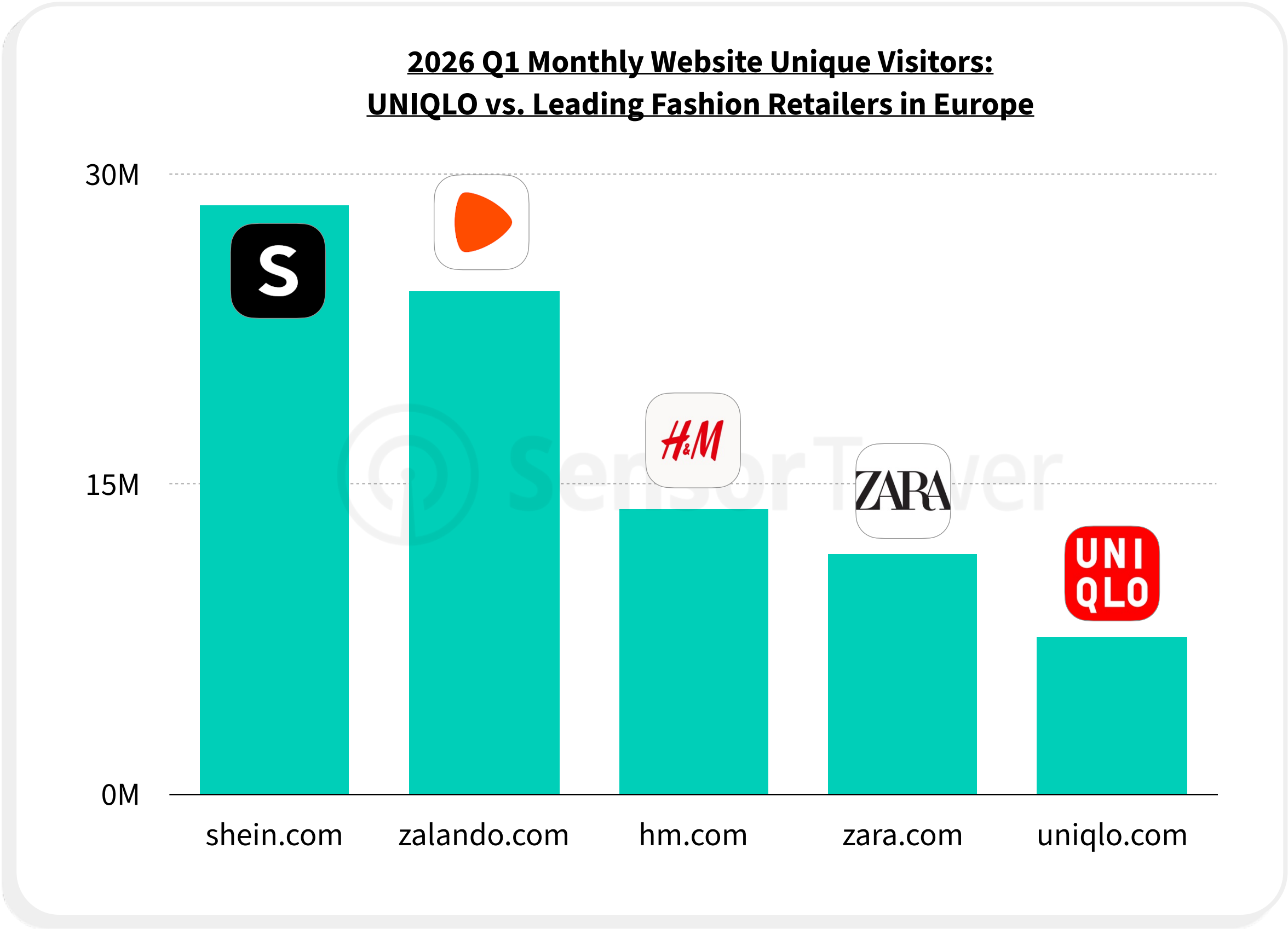
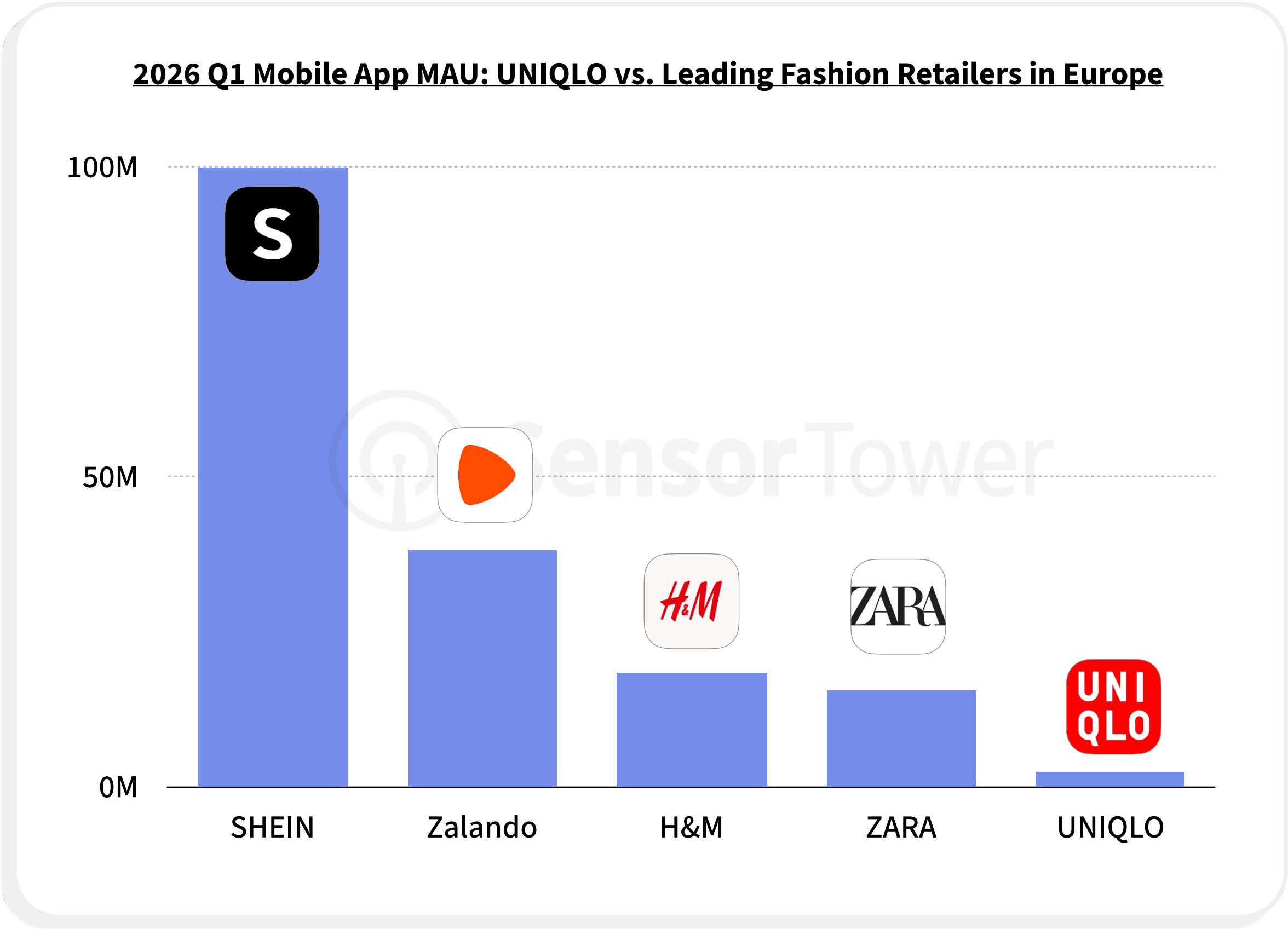
Source: Sensor Tower App Performance Insights & Web Insights



UNIQLO’s website unique visitor base has grown significantly across Europe and the U.S., reinforcing the web as its primary user acquisition channel in these markets. Audience overlap analysis shows that web-only users account for 77% in the U.K., 81% in Germany and 78% in the U.S., indicating that the majority of users engage with UNIQLO exclusively through the website, while app penetration remains relatively low.

UNIQLO's European Digital Challenge: Despite Strong Brand Equity, Mobile Still Lags Leading Fashion Retailers

Source: Sensor Tower App Performance Insights & Web Insights



In Europe, UNIQLO's website unique visitor base is more than 3x larger than its mobile app MAU, reinforcing the web as its primary acquisition channel. Strengthening SEO, landing pages, conversion journeys and traffic capture from search engines and social platforms remains critical to its cross-platform growth strategy. At the same time, closing the MAU gap with leading competitors is equally important. Increasing high-frequency app engagement through features such as outfit inspiration, styling tools, loyalty rewards and online-to-offline experiences can help drive user activity, retention and conversion.

Key Takeaways

1

Global eCommerce: Website Traffic Reaches New Highs While Mobile User Growth Stabilises

Despite mobile maintaining a large user base, eCommerce websites continued to gain momentum.

In Q1 2026, website visits increased 9% YoY and unique visitors grew 21% YoY, reaching new highs and reinforcing the growing importance of web channels in customer acquisition.

2

Global Growth Hotspots: India Leads Web Growth, Africa Drives Mobile Expansion

On mobile, Africa recorded the fastest growth, with app downloads rising 26% YoY, making it the key driver of global eCommerce download growth.

On the web, India remained the largest market with nearly 58 billion website visits over the past year and achieved 28% YoY growth, significantly outperforming other markets.

3

Fashion and Beauty eCommerce See Strong Web-Led Growth

In Q1 2026, both fashion and beauty eCommerce recorded 50%+ YoY growth in website traffic and unique visitors.

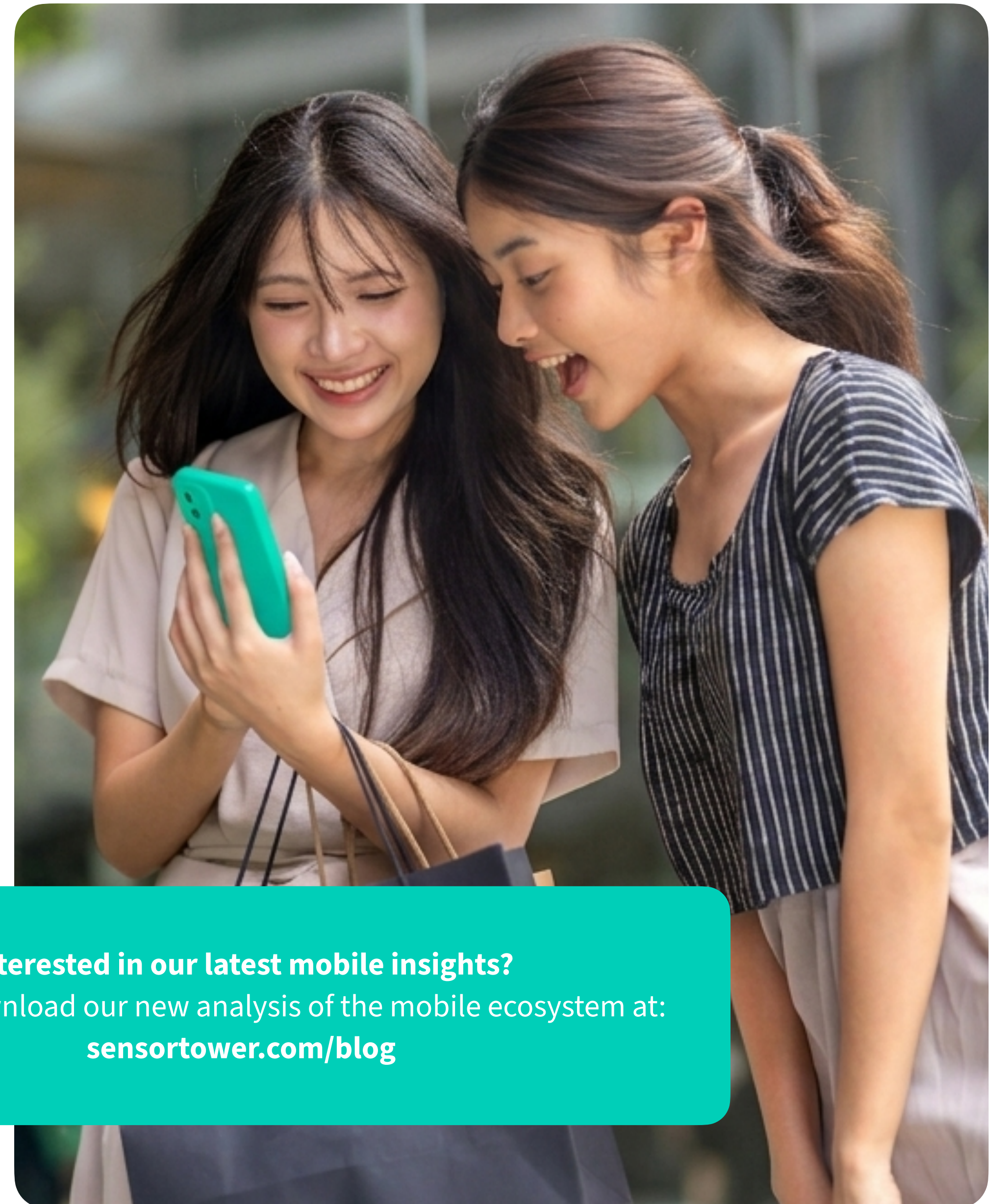
For fashion and beauty brands, investing in website experience, SEO, and social-driven traffic acquisition has become a critical lever for attracting new users and driving overall business growth.

Sensor Tower

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Lead Author



Rui Ma
Senior Analyst, APAC
Hubei

Contributor



Nan Lu
VP of Marketing, APAC
San Francisco

Contributor



Yena You
Insights Strategist
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Donny Kristianto
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