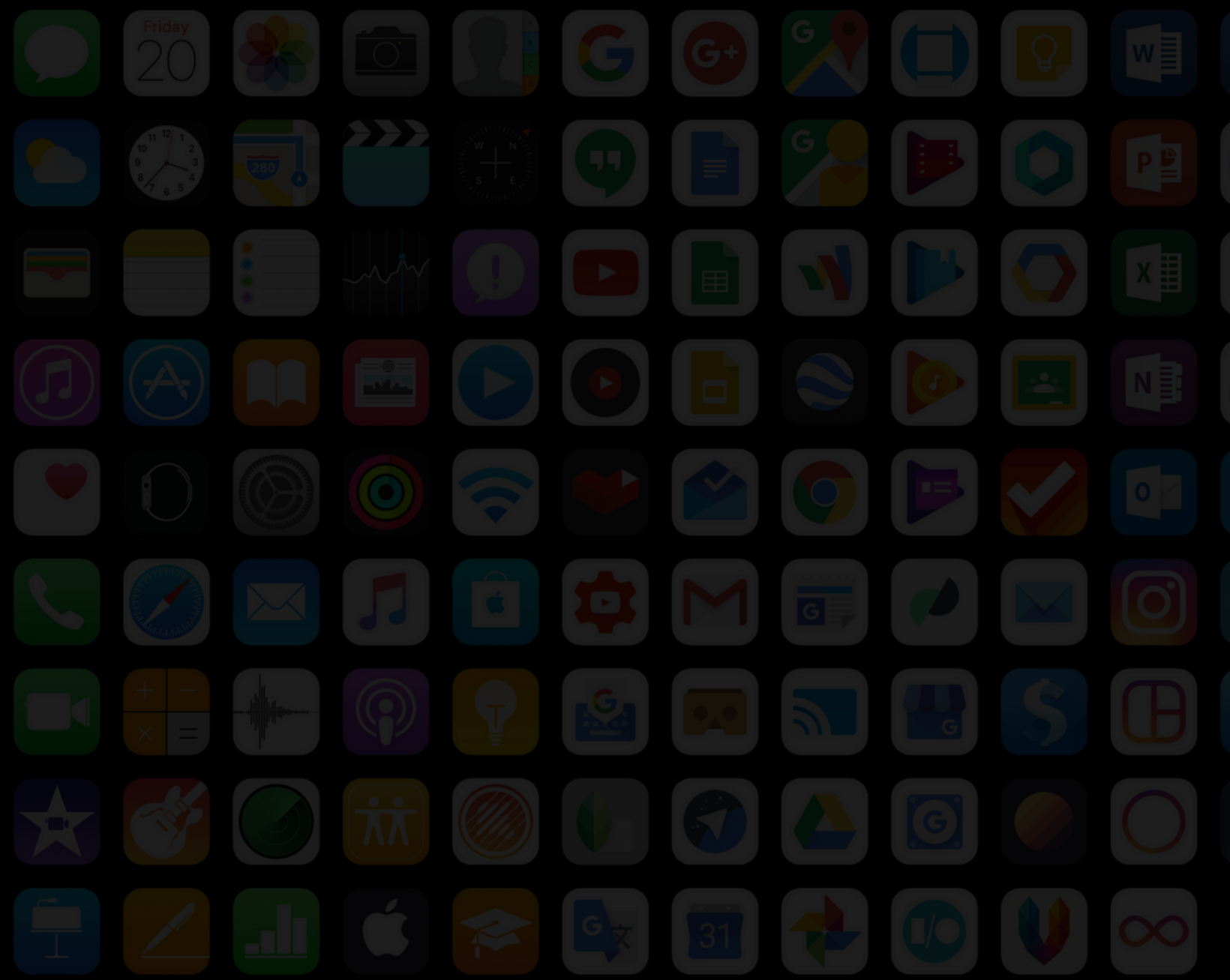


# State of Apps Pakistan | 2023



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# Foreword



With a median age of just 20.6 years, the majority of Pakistanis today are digital natives.

Unlike the older generations, who grew up sitting around the one family television set, the newer lot considers entertainment a more personal experience with mobile being the device of choice.

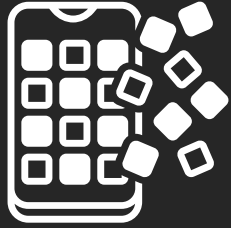
The scale of global platforms like TikTok and YouTube is testimony to that as they together account for around three-fifths of all bandwidths on video protocols in the country.

The market is ready for a premium streaming service that offers both live sports and entertainment under one banner, while doing so legally, ad-free, and through a seamless user experience.

**JONATHAN MARK - CHIEF COMMERCIAL OFFICER @ BEGIN.WATCH**



# 2023 Wrapped – Global



**257B**

Global App Downloads



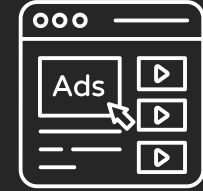
**5.1T**

Total Hours



**\$171B**

App Store Spend



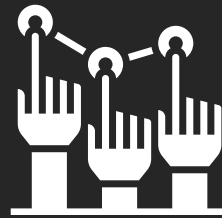
**\$362B**

Mobile Ad Spend



**4.7B**

Mobile Internet Users



**58%**

Penetration Rate



**5 hours**

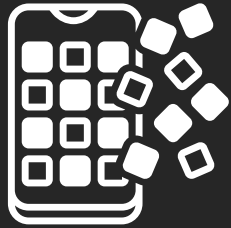
Daily Time spent per User



**5.6B**

Unique mobile subscribers

# 2023 Wrapped – Pakistan



**3.5B**

App Downloads



**99B**

Total Hours



**PKR 32.8**

Effective Price (Revenue)  
per GB per month



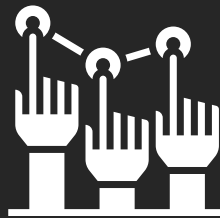
**80.3%**

Mobile Teledensity



**124M**

Mobile Broadband Subscribers



**53.2%**

Broadband Penetration



**7.5GB**

Average Monthly Mobile  
Data consumed per user



**5K**

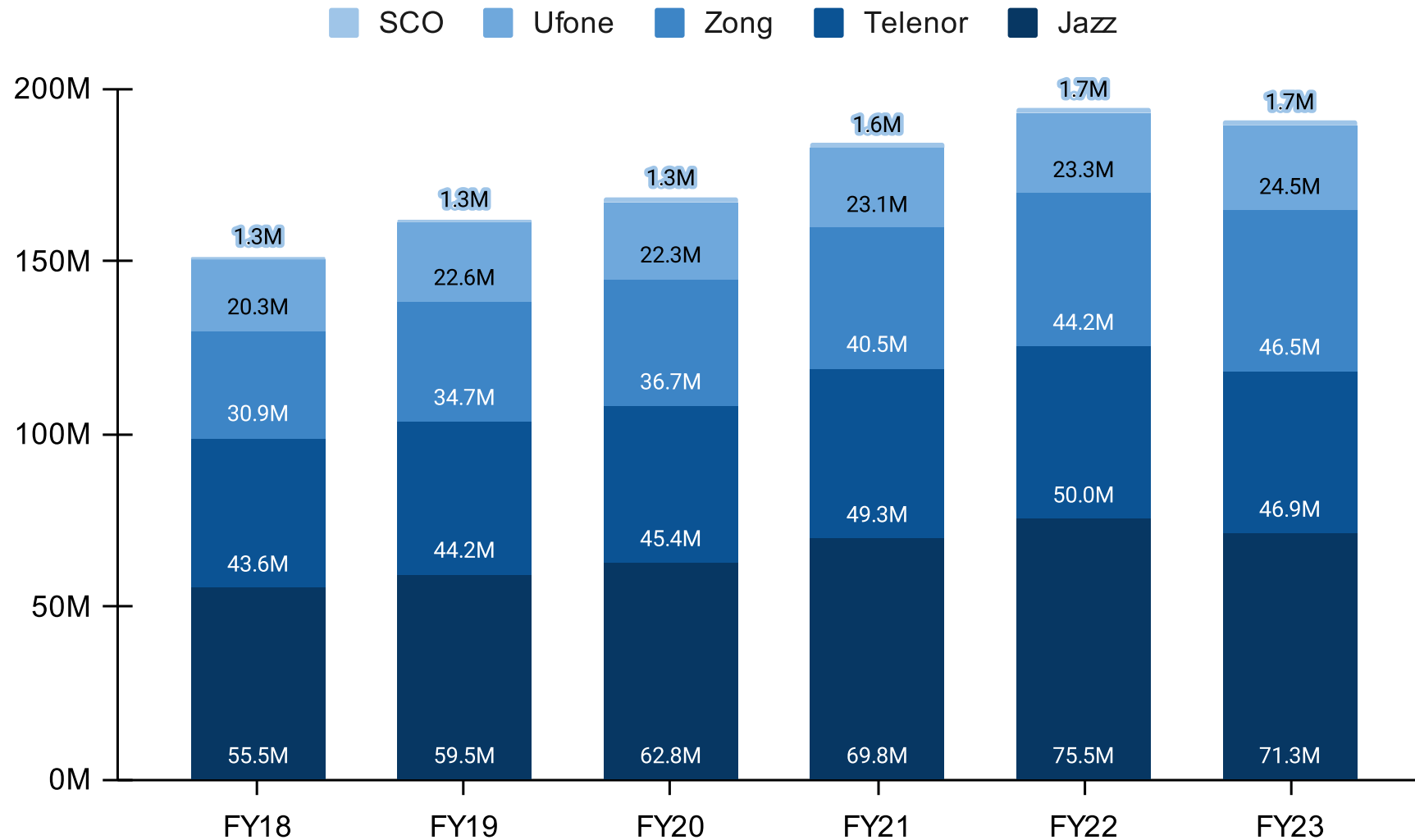
Apps released by Pakistani  
developers in 2023



The background features a dark blue color scheme with several data visualization elements. On the left, there is a bar chart with approximately 10 vertical bars of varying heights. A dashed line with circular markers connects the tops of several bars, showing an overall upward trend. On the right side, there is a network diagram consisting of interconnected nodes and lines, resembling a web or a data network. The overall aesthetic is modern and technical.

# Macro Mobile Trends

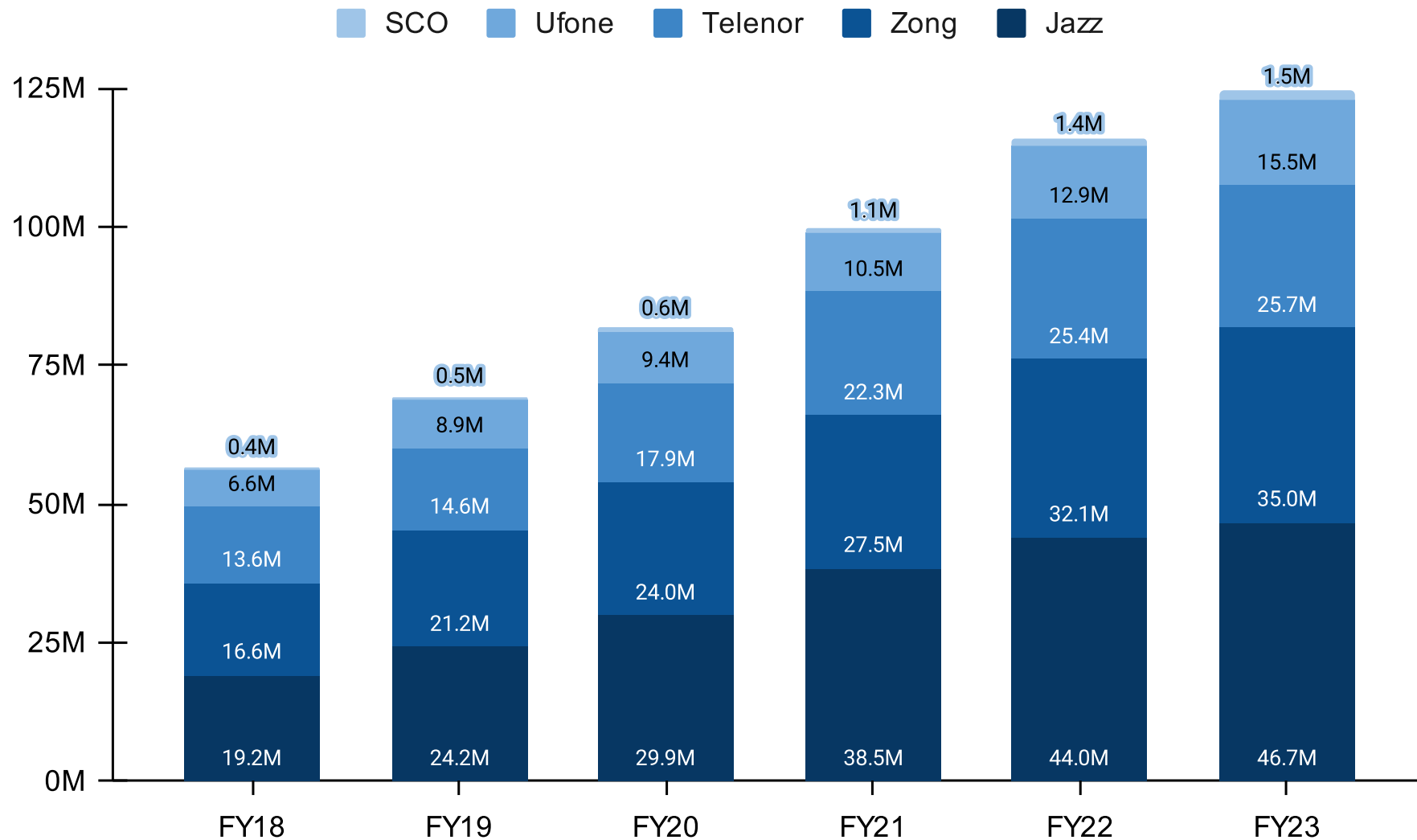
# Cellular subscriptions decline 1st time in six years



In a worrying sign, the total cellular subscriptions in Pakistan fell annually to close FY23 at 190.9 million, down 1.9% from 194.6 million. This is the first instance of decline in at least six years, and possibly on record.

Both Jazz and Telenor, the two largest telecoms, contributed to the downward trend with their subscriptions falling by 4.1 million and 3.1 million, respectively. However, it's part of the telecom industry's conscious drive to get rid of low-value customers and focus on segments with better monetary return. That means moving further away from voice to data.

# Jazz leads the way with ~32% of mobile broadband subscriptions

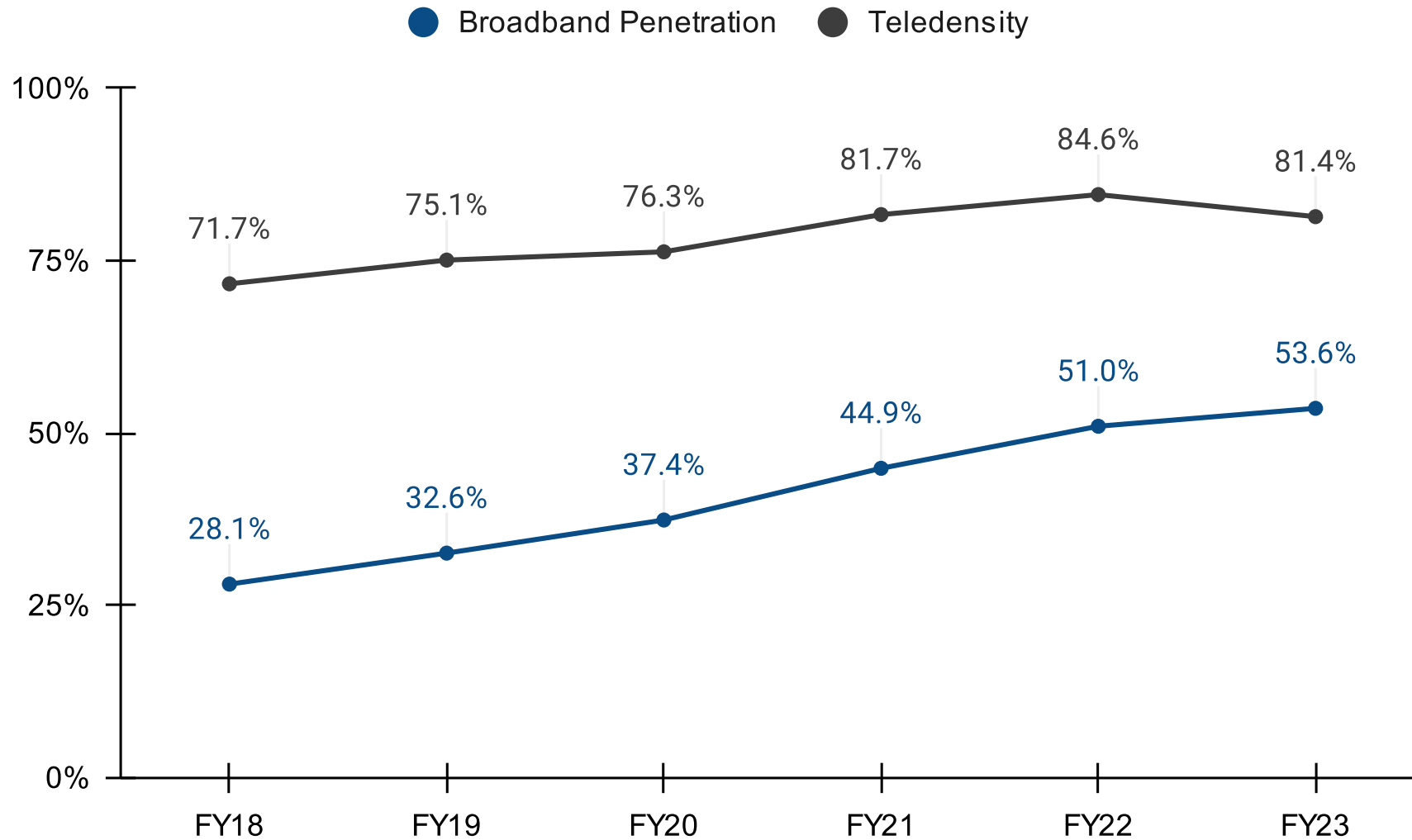


This shift from voice to data was reflected in the growth of mobile broadband subscriptions, which rose 7.5% to 124.4 million in FY23. While the growth has moderated to single digits for the first time in at least five years, it's partly due to the higher base.

Here again, Jazz was the market leader with 46.7 million subscriptions, or 37.1% of the total. However, it was Zong which added the highest number of new subscribers, at 2.9 million. Traditionally a laggard, Ufone has also changed course and grew mobile broadband subscriptions by 2.5 million. After Telenor acquisition, the state-owned company is set to become the second largest telco.



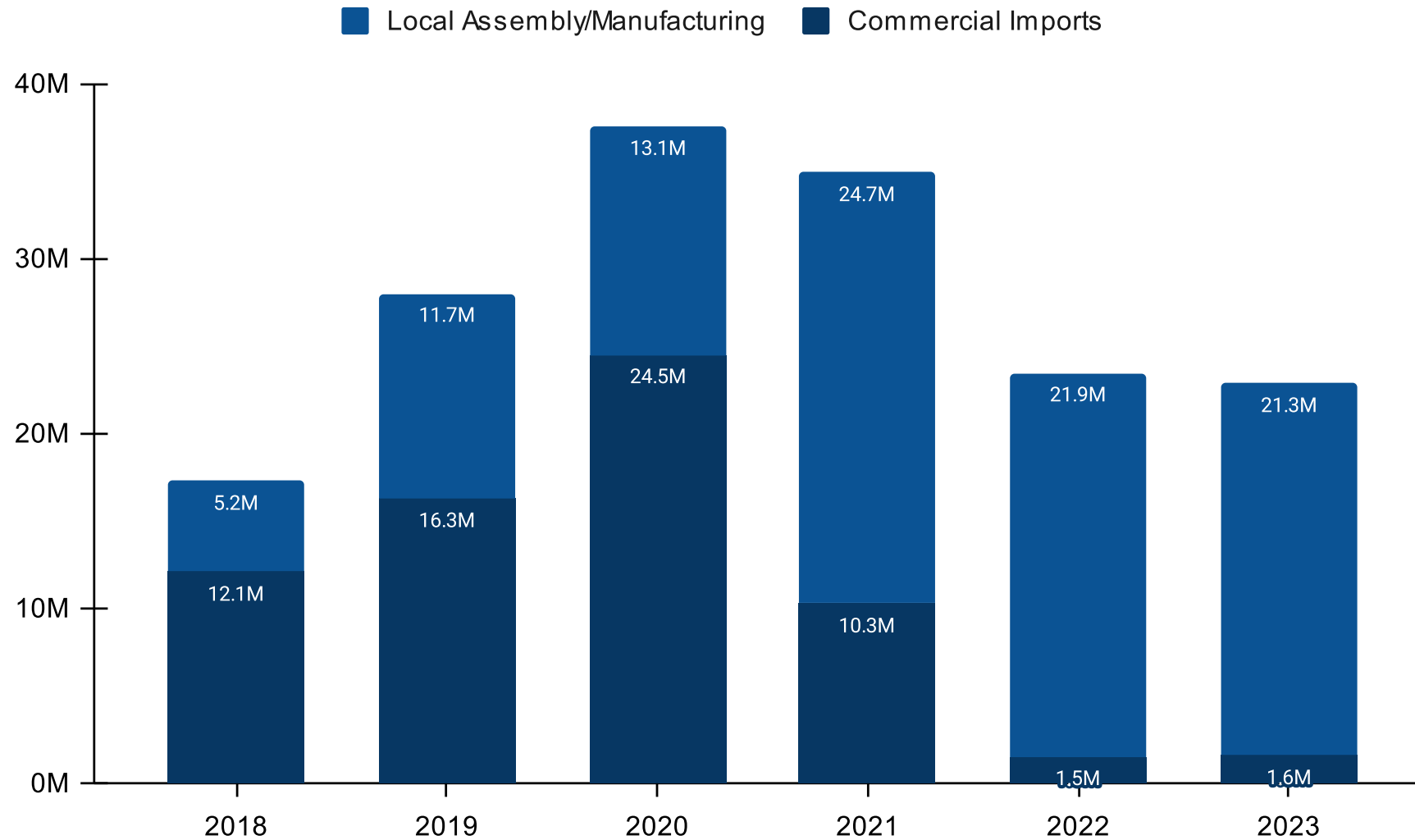
# Teledensity dips while broadband penetration improves



After five years of improvement in a row, Pakistan's teledensity slipped to 81.4% on the back of fall in mobile subscriptions. That means a smaller share of our population has access to cellular services today than it did two years ago, in FY21.

On the other hand, broadband penetration marched upwards to 53.6% in FY23, up from 51% the year before. The entire growth here is led by 4G where subscriptions surged by 12.5 million, more than negating the 3.8 million decline contributed by 3G.

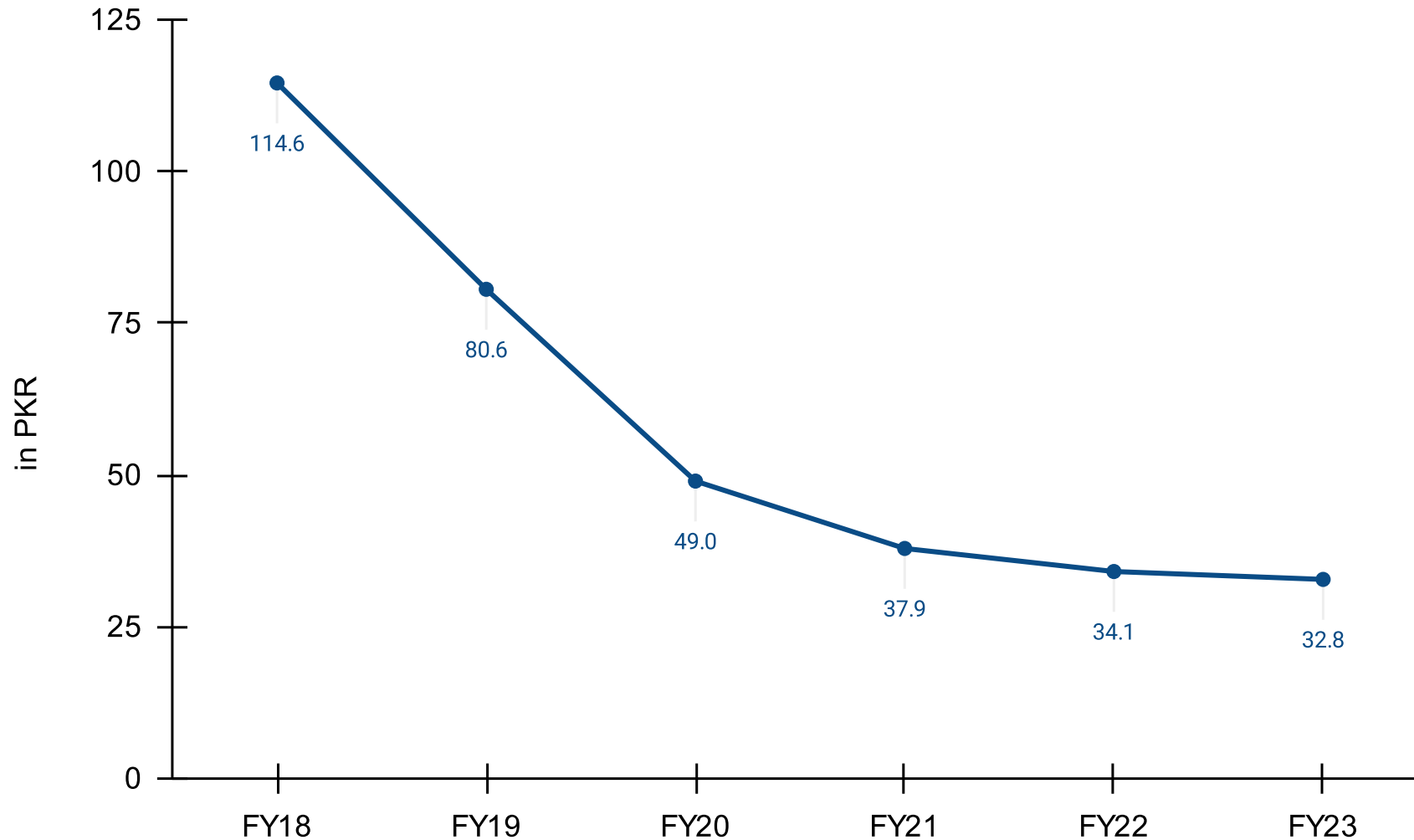
# Mobile manufacturing shrinks despite localization



Concerningly, Pakistan fell behind when it came to ensuring growth in access to devices. Right after the issuance of Mobile Manufacturing Policy in 2021, the country witnessed a steep increase in local assembly of handsets, from 13.1 million to 24.7 million. A more localized supply chain reduced the need for commercial imports, which more than halved to 10.3 million over the same year.

However, the momentum didn't continue after that as import restrictions wiped out assembled purchases while local manufacturing also experienced supply chain bottlenecks in addition to rising costs.

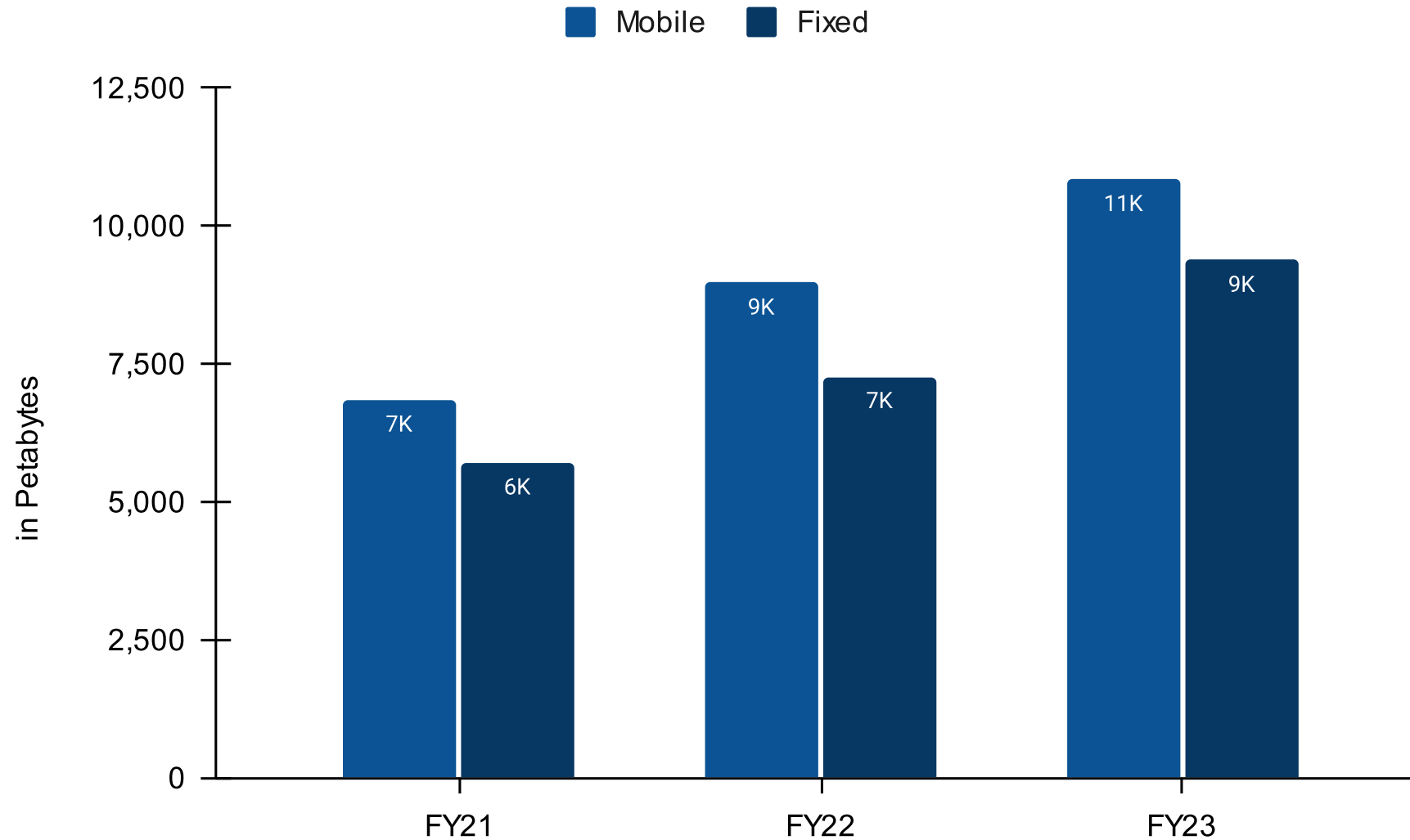
# Average cost of 1 GB data has plunged 71% in 6 years



In line with the global trends, Pakistan has also experienced a continuous decline in the average cost of one gigabyte of data. Compared to the FY18 levels, the figure has plunged by 71.4% to PKR 32.8. However, over the last two years, the rate of decline has moderated noticeably and is now in just single digits.

While good for consumers, the falling price of data also means less revenue for the telcos who have been struggling to maintain their average revenue per user against steep rupee devaluation. In turn, that limits their ability to reinvest in upgrading infrastructure.

# Mobile broadband beats out fixed connections in data usage

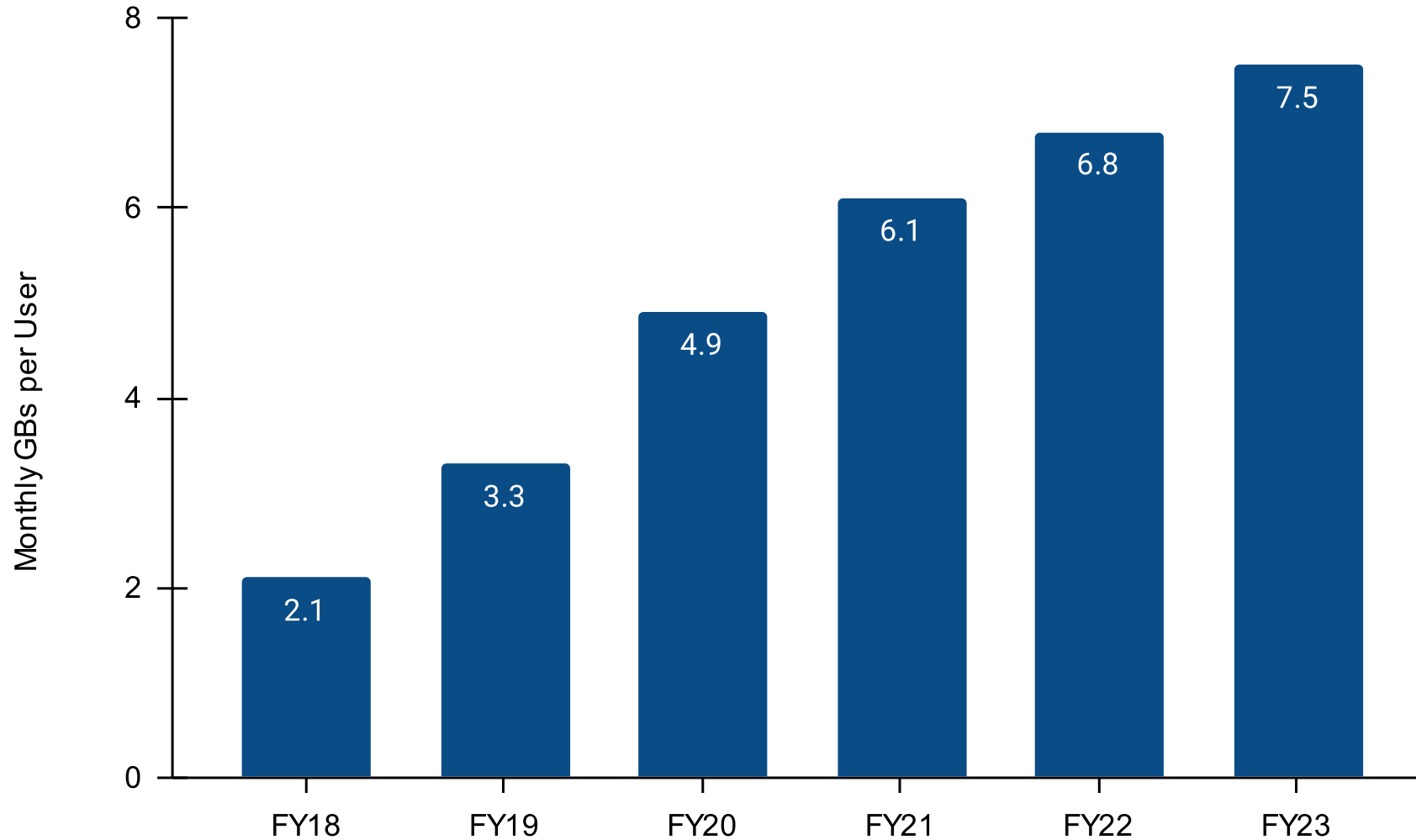


Mobile's dominance was visible not only in terms of number of connections but also in data usage. In FY23, total data usage breached the 20,000-mark and closed at 20,235 Petabytes.

Of this, mobile accounted for 53.6%, or 10,850 Petabytes. However, its growth rate of 10.9% was slower than fixed broadband, which rose by 28.0% to 9,385 in FY23.

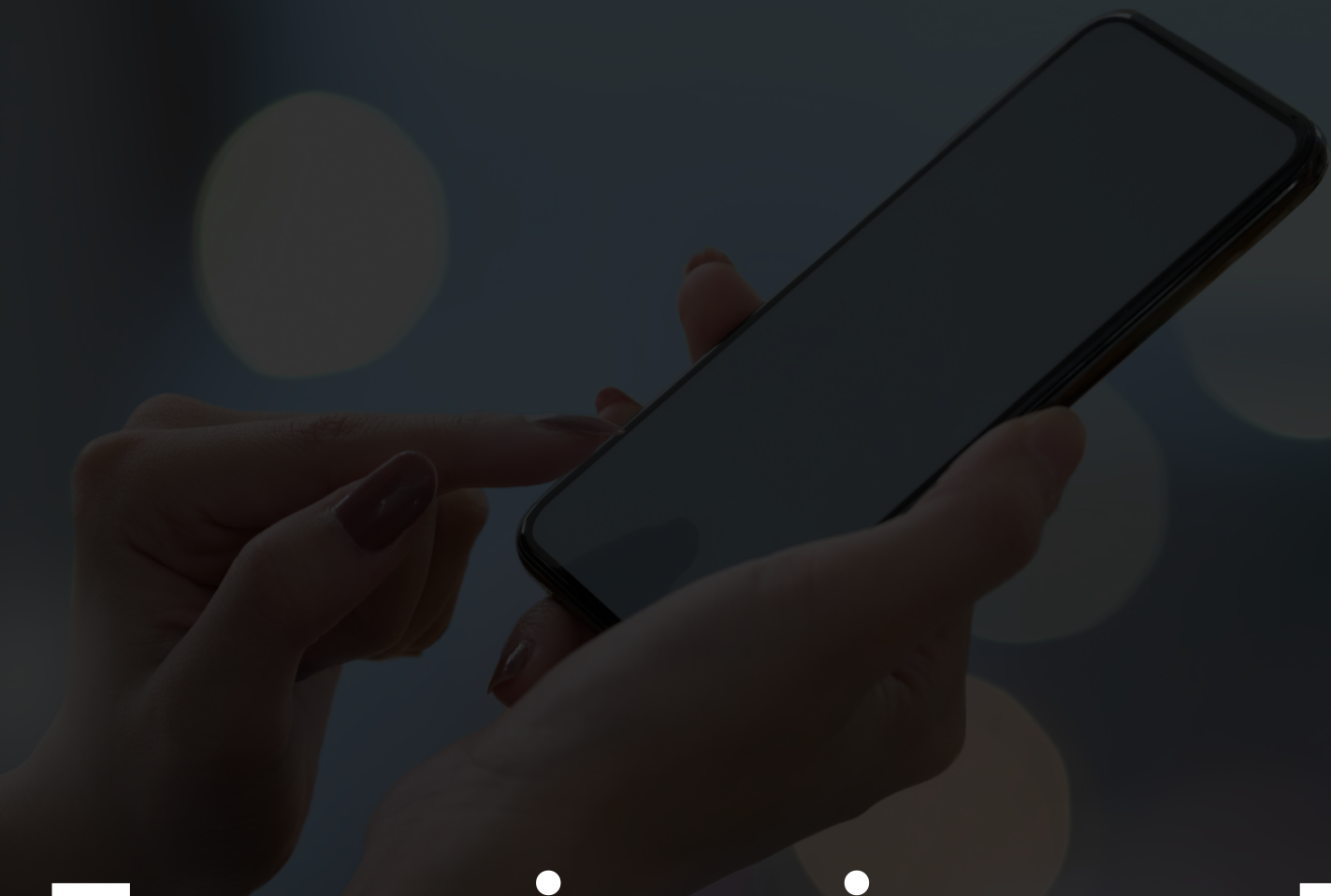
As a result, the share of fixed broadband in total data usage edged up to 46.4% in FY23, up from 44.8% the year before.

# Average mobile data consumption trends upwards



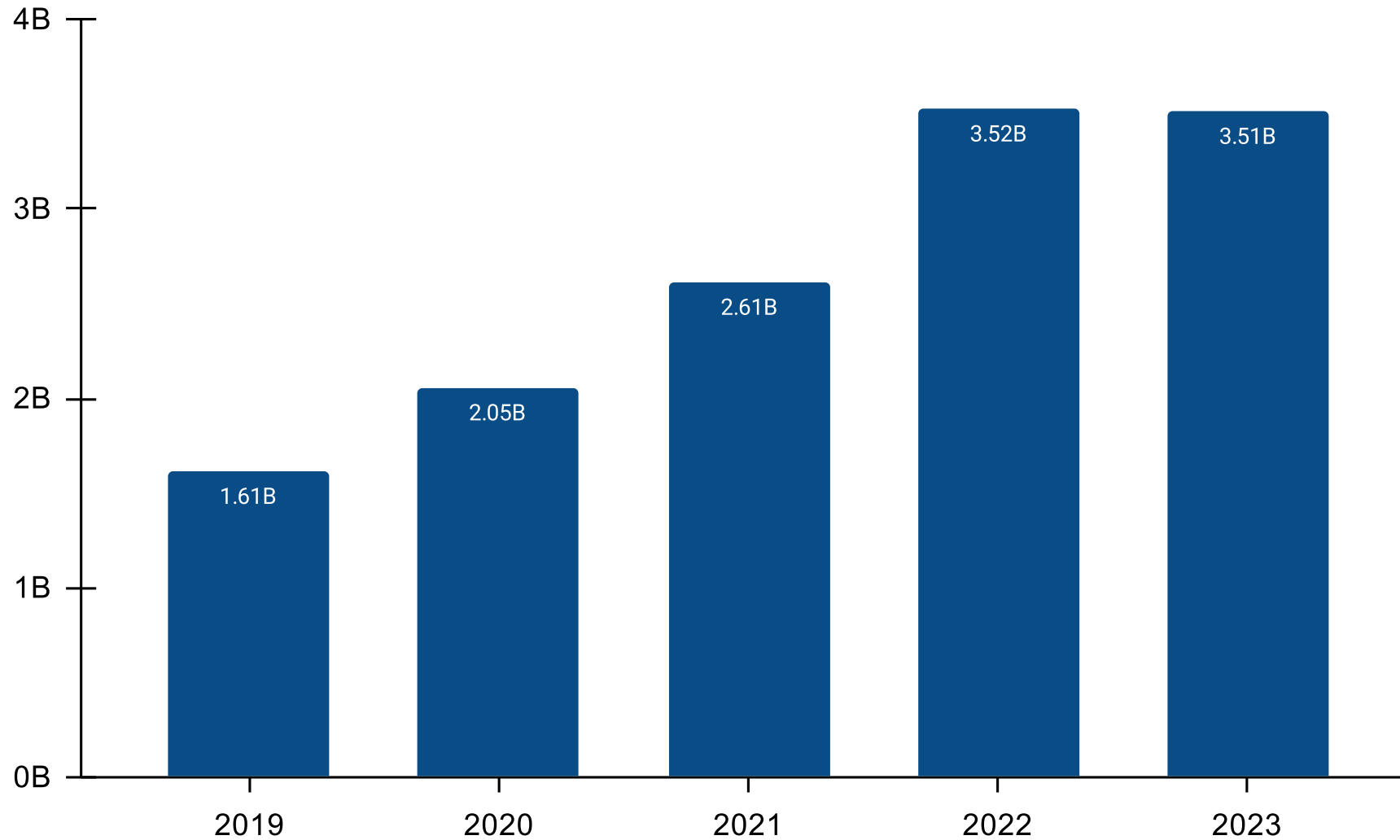
While the relative share of mobile in the total data usage may have slipped a little, the average monthly mobile data consumed per user rose to 7.5 gigabytes in FY23.

This represents an increase of 10.3%, similar to the 11.5% growth seen in FY22 but a far cry from high double digits witnessed before that. While that may suggest a moderation, recent data from PTA shows the monthly data usage per user jumped to 8.2 gigabytes in the October–December of 2023. If a similar trajectory is followed for the remaining half of FY24, the growth would bounce back to higher levels.



# Zooming in on Pakistan

# App downloads in Pakistan ease to 3.51 billion

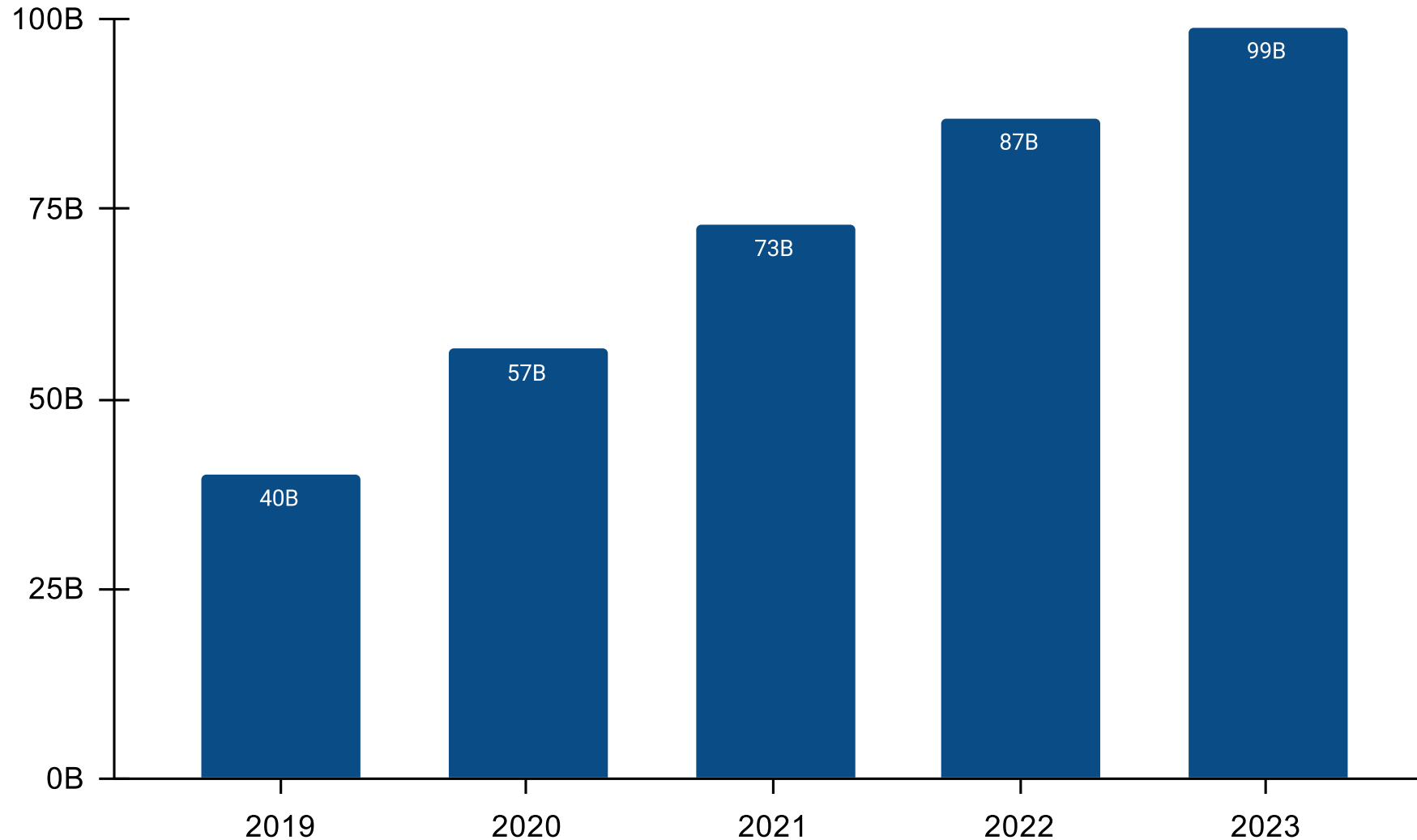


Pakistan's apps economy finally eased a bit as downloads clocked in at 3.51 billion in 2023, almost flat compared to 3.52 billion the year before.

This is in stark contrast to the yesteryears when the country was the fastest growing major market globally in both 2022 and 2023, at 27% and 35%, respectively.

While the higher base might have played some role, the slowdown is also in line with the global trend where worldwide downloads only edged up 0.8% to 257 billion in 2023, from 255 billion the year before.

# Pakistan ranks 10th globally in hours spent on mobile



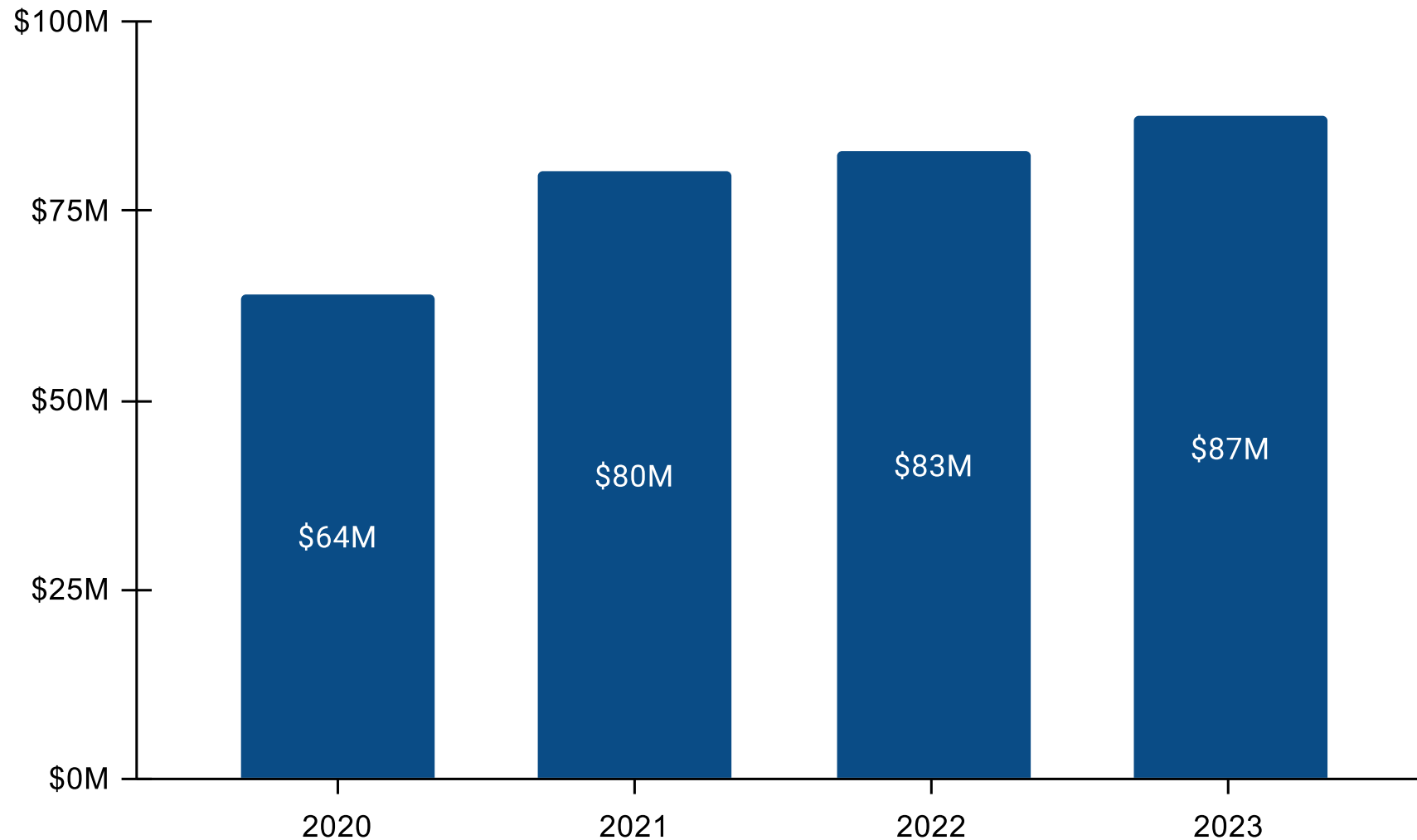
Despite fewer downloads, mobile occupied more time in the life of Pakistanis who spent 99 billion hours in 2023, putting us in 10th position worldwide. Unsurprisingly, the five most populous countries dominated this list, with India topping the chart.

This translates into a jump of 13.8% compared to 87 billion hours in 2022, meaning Pakistanis spent an additional 12 billion hours on their mobiles during the year.

It is also more than 2x the global increase of 5.8%. Since 2019, total hours spent on mobile by Pakistanis have grown by an estimated 147%.



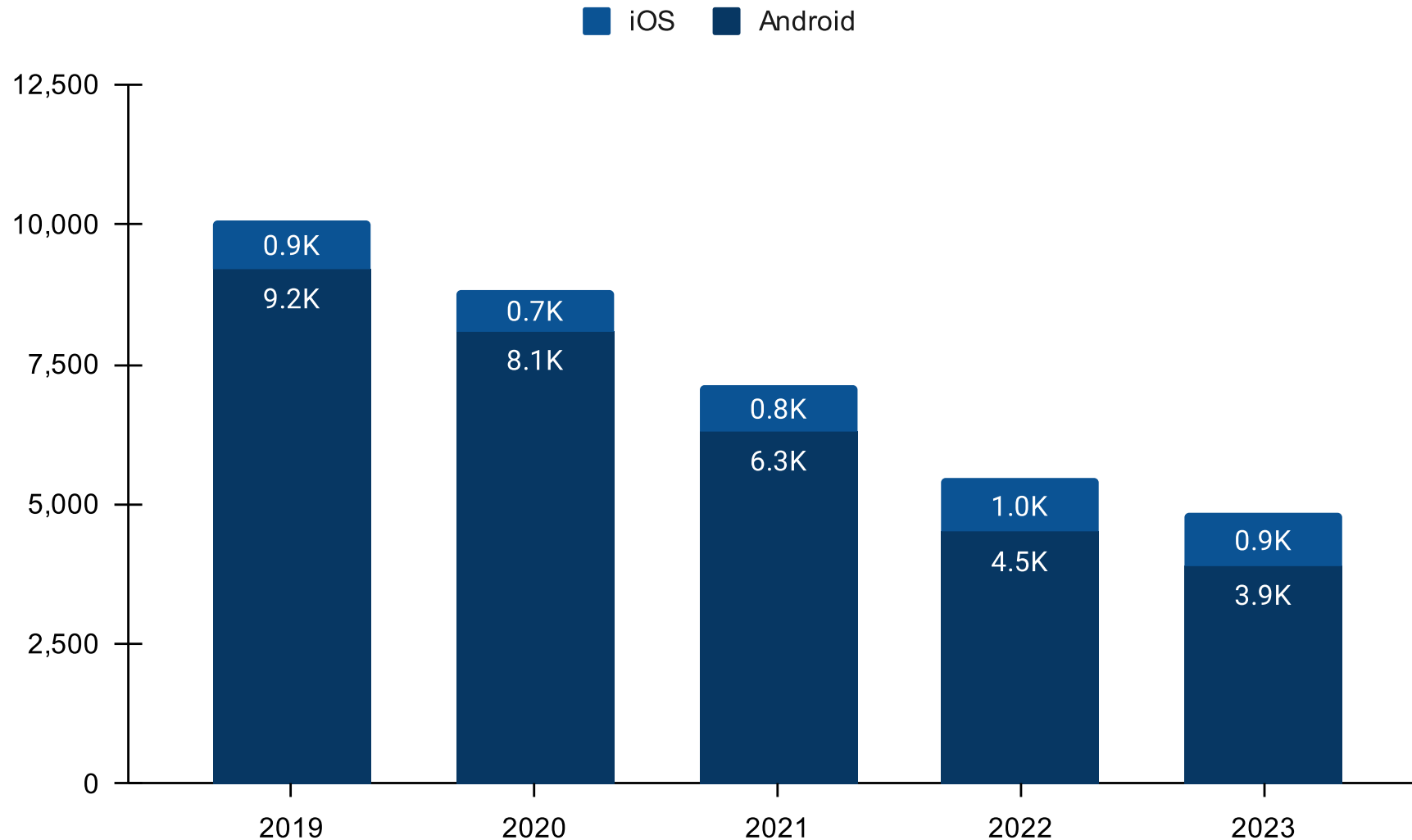
# Consumer spending on apps crosses \$87M



While Pakistan has lately emerged as a major market in terms of downloads, it's nowhere to be found in the list of countries by dollar value, typically ranking in the mid-60s globally. Nevertheless, the total consumer spending, which is before the Apple and Google commissions, still managed to increase to more than \$87 million in 2023, up from the preceding year's \$82.9 million.

Not only did it accelerate compared to 3.4% in 2022, the growth rate also outpaced the global figure of 2.4% though there's absolutely no comparison between the respective scales of the two.

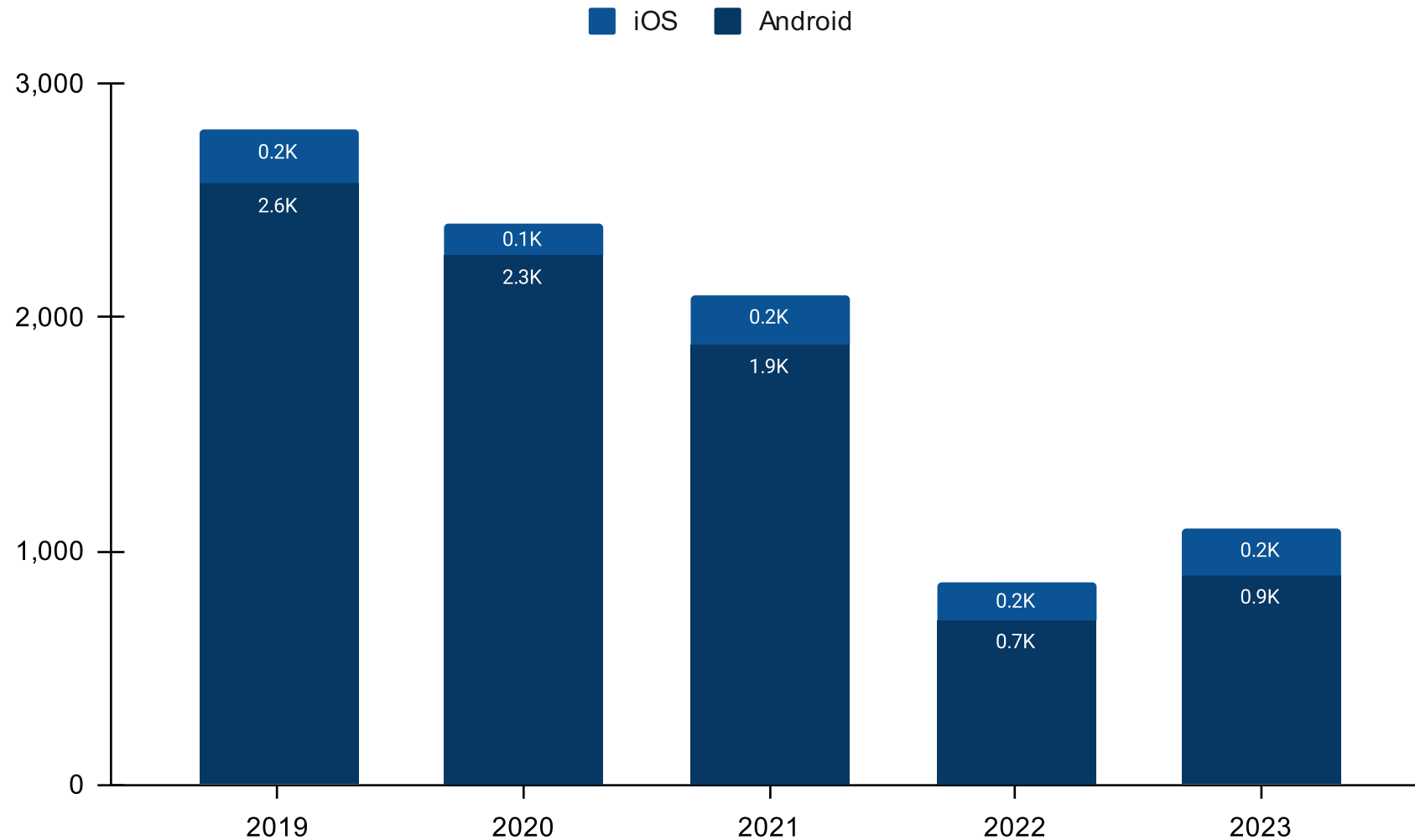
# Locally developed apps fall to lowest in 5 years



The total apps published by Pakistani developers continued its downward slide and hit just over 4,800 in 2023, down 11.4%. This was almost singularly driven by Google Play, where the count of Android apps fell by 600. Consequently, the share of iOS in the aggregate edged up to 22.3%.

However, this decline is not necessarily a matter of concern and is a consequence of Google Play's policy over the years at tightening its criteria. In fact, the number of apps released have fallen globally, hitting 980K in 2023, from 1.3 million the year before.

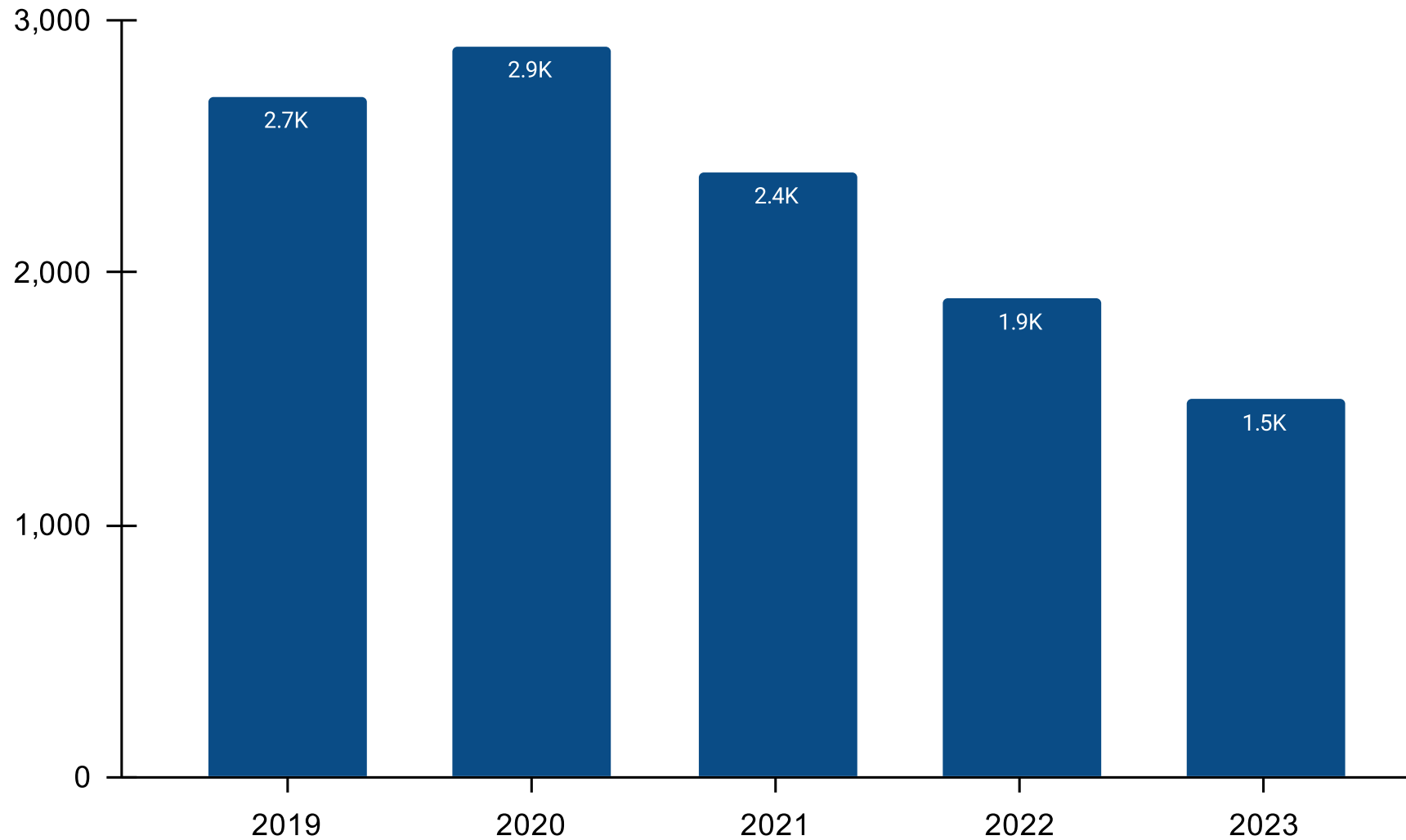
# Locally developed games see slight uptick after 4-year decline



After at least five years, games published by local developers finally bounced back almost 1,100 in 2023, up from just 868. The Google Play-to-iOS mix of 28.8% was almost identical to the 2022 level.

To reiterate, the declining number of games is not necessarily bad or even unique. It is a result of Google Play's relatively stricter criteria which has filtered out some of the developers from the publishing space. A similar trend can be witnessed across other geographies as well, including peers like Indonesia and Vietnam.

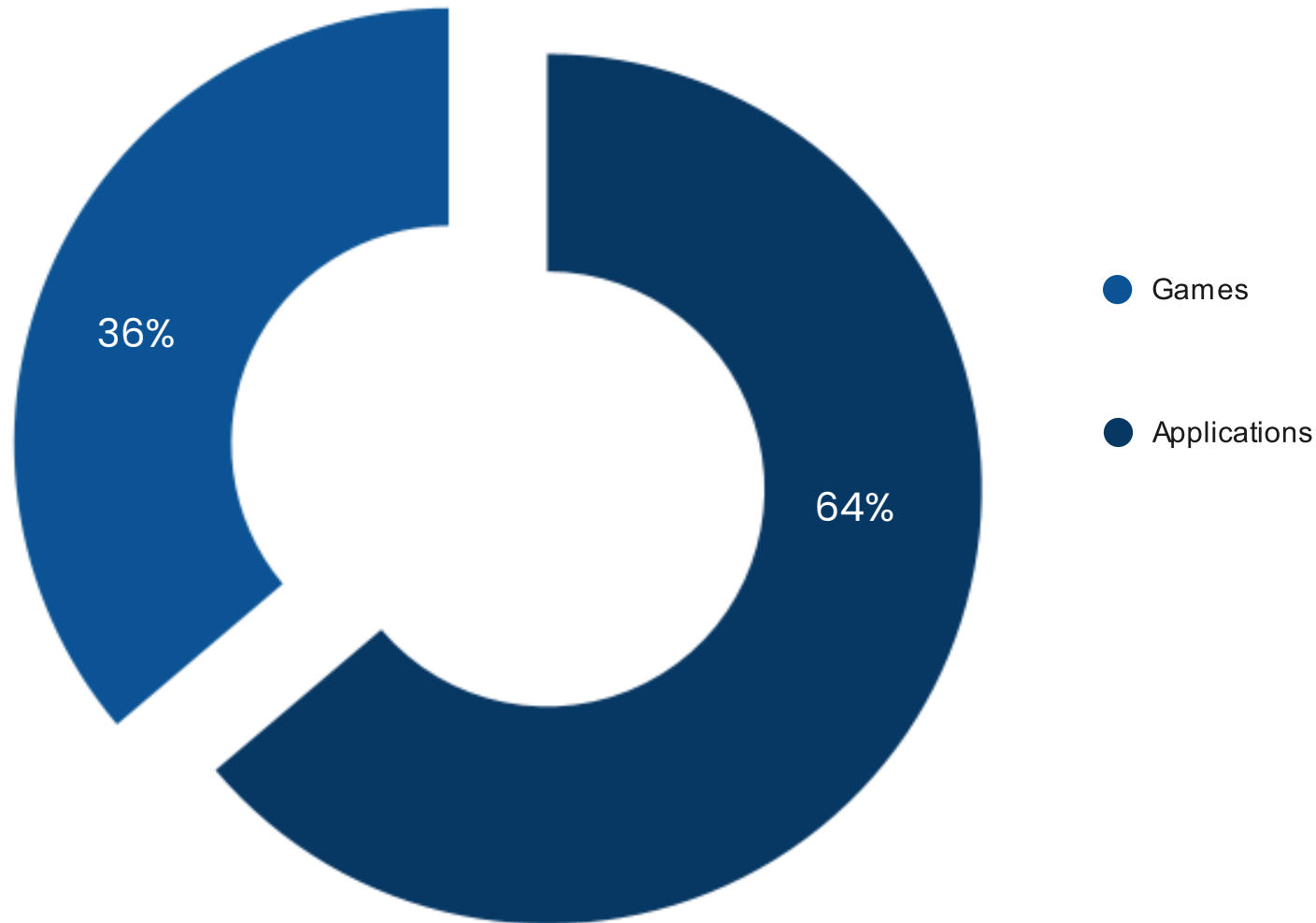
# Fewer local developers publishing apps



The effects of Google's tightening criteria can be clearly seen in the publishing activity of Pakistan-domiciled developers. In 2023, the number of developers publishing an app reached 1,500.

This represents a decline of 21.1%, in line with the change seen back in 2022 and is continuation of the trend that began in 2021. However, there are two important considerations here. First, the downward trajectory in total publishers is a global phenomenon. Secondly, the count of publishers is typically understated as many app developers are either domiciled in foreign jurisdictions or publish under third-party players.

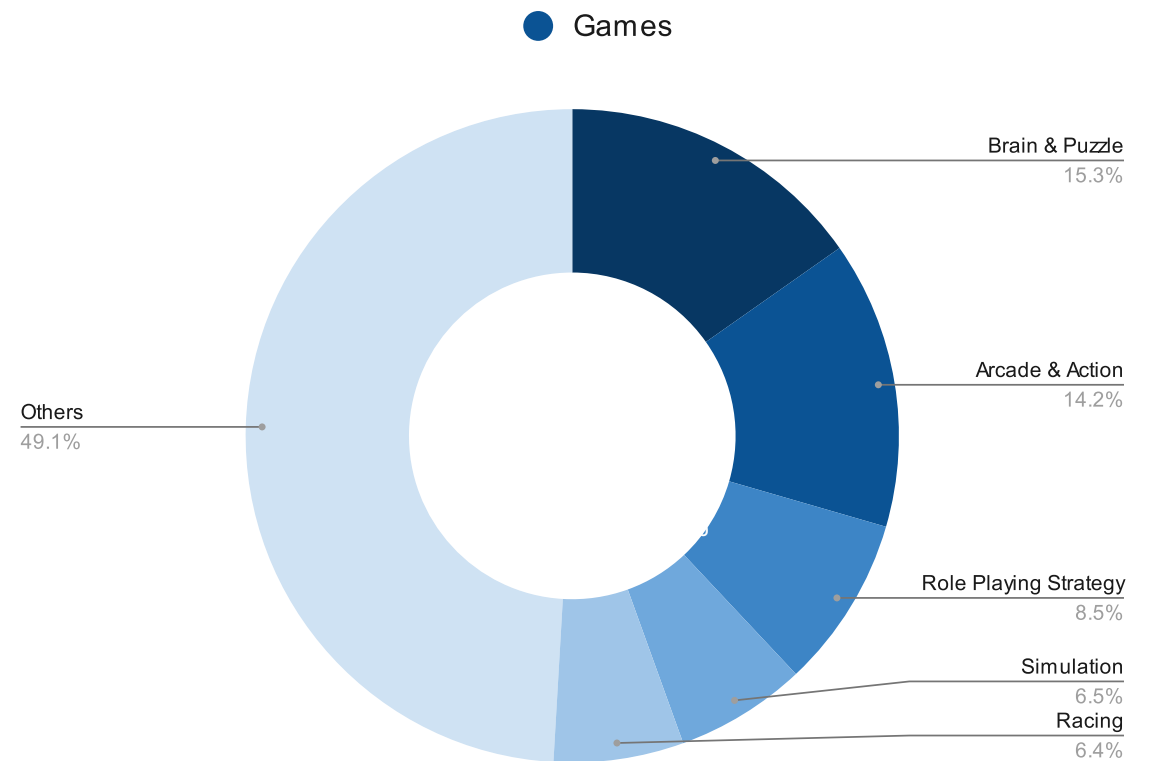
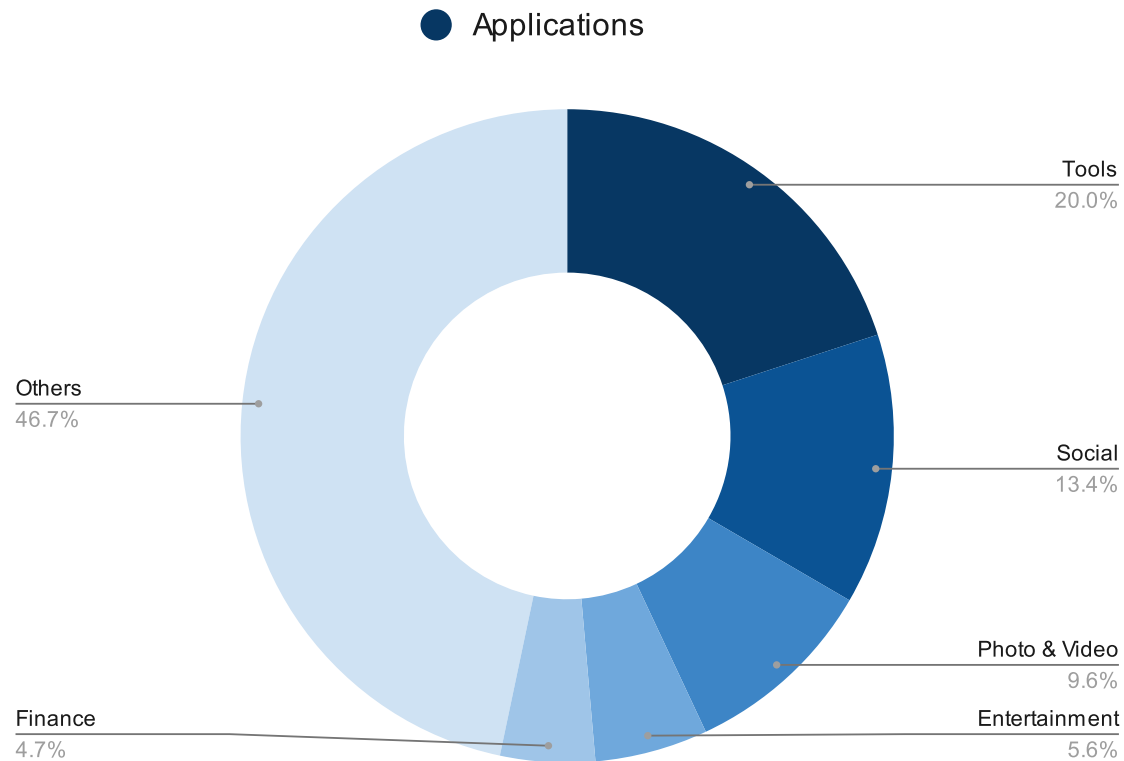
# Games make up over a third of downloads in Pakistan



Just over a third of all Pakistani downloads during 2023 were games while apps' share stood at 64%. This aligned neatly with the global trend where 34% of the installs were for apps and the remaining 66% for games.

However, what makes Pakistan unique is the dominance of Android, whose share in overall downloads stands above 95%. While this shouldn't surprise anyone, given the lack of iOS devices in the country, the proportion is much higher than not only global levels but also compared to markets with similar demographics and incomes.

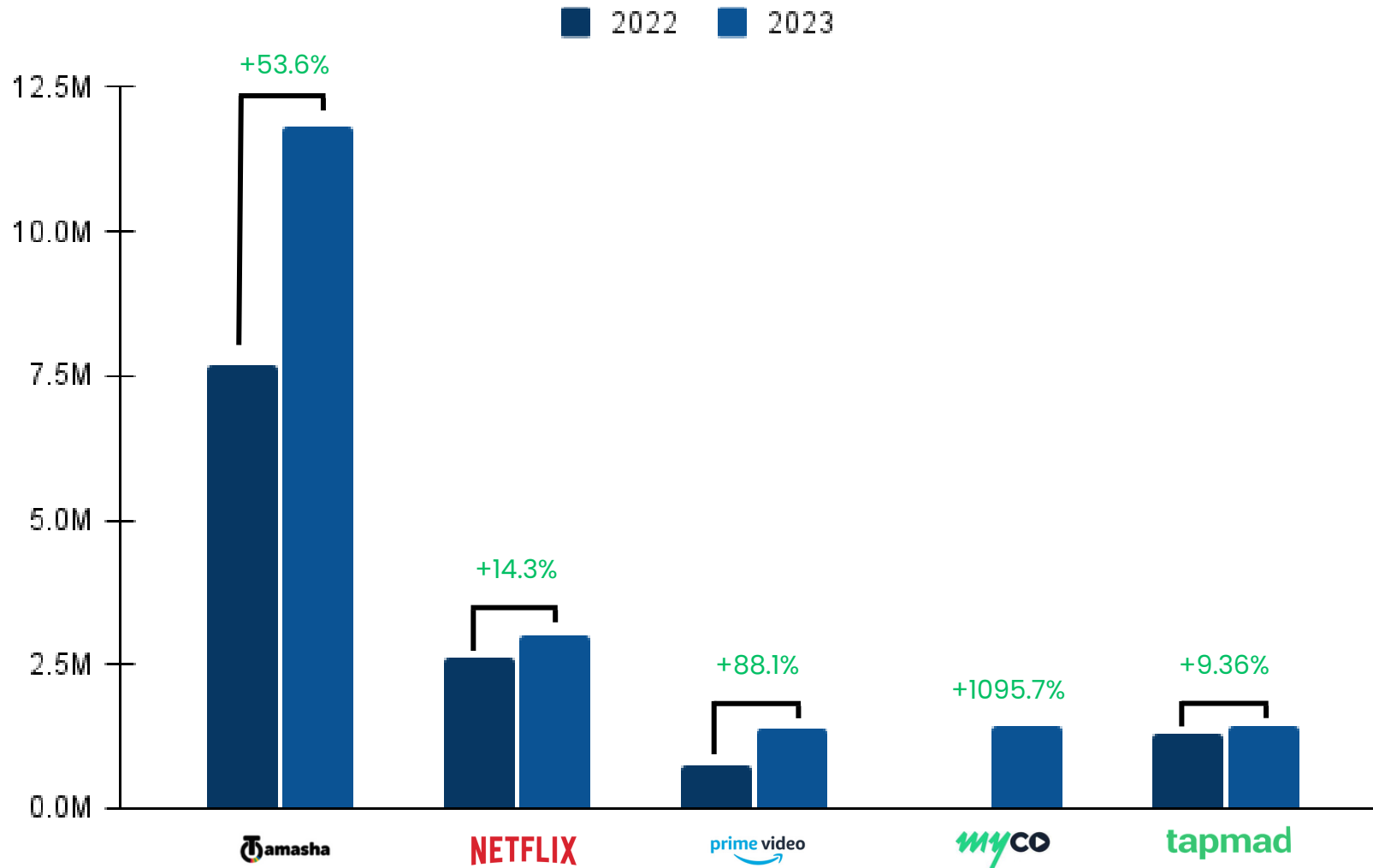
# Download Categories: Apps vs. Games





# Category Breakdowns

# Most-downloaded Streaming Apps

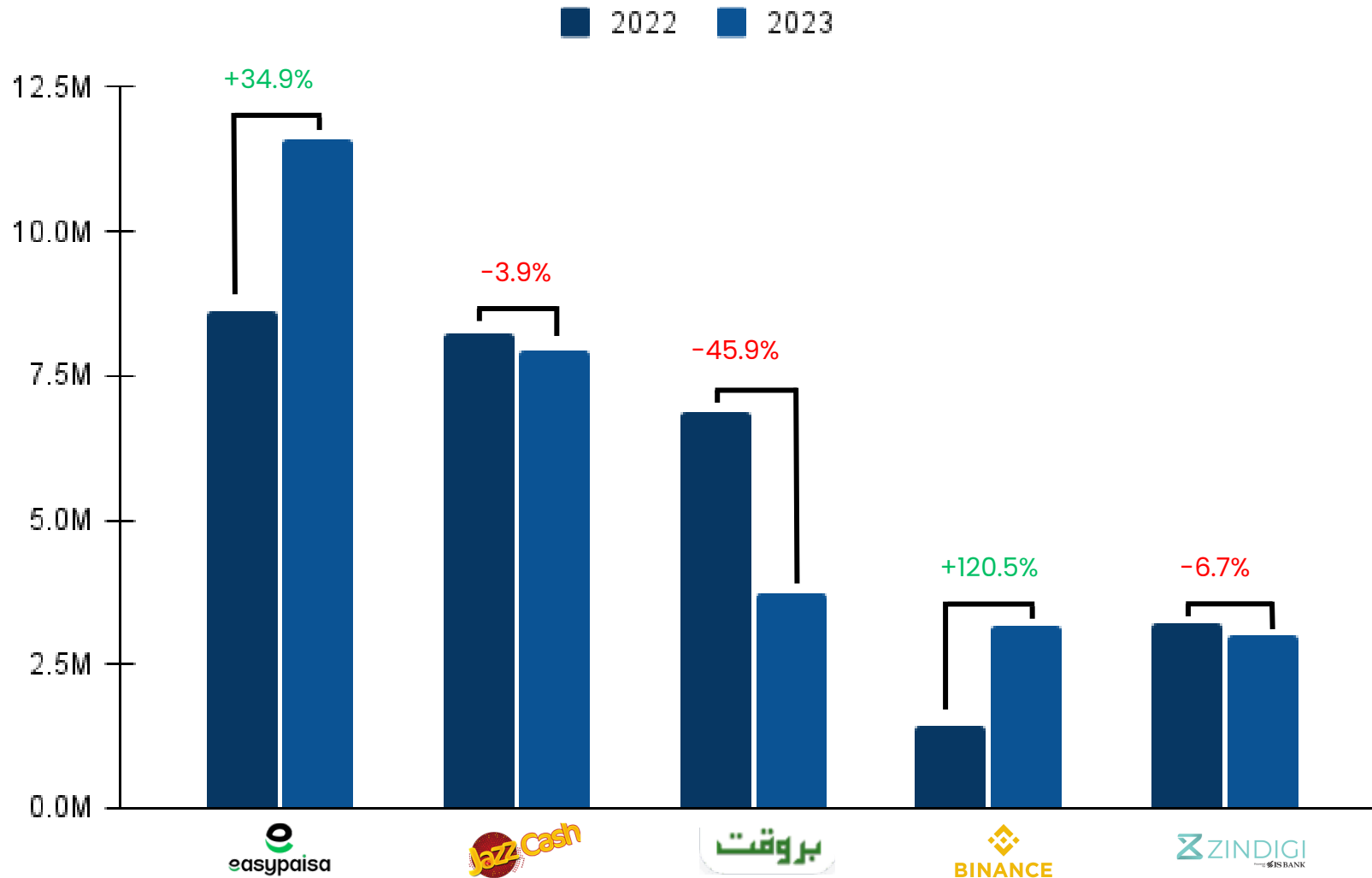


Globally, Streaming | OTT was the fourth largest app subgenre in terms of downloads during 2023. Pakistanis too showed an appetite for such platforms, as all top five players grew compared to the previous year.

Tamasha was the leader for the second year in a row as downloads surged by a phenomenal 53.6% to 11.8 million in 2023. This feat can be singularly credited to sports where cricket seasons, i.e. the two ICC World Cups and the PSLs, raked in majority of the installs. Myco also rode on a similar wave and crossed 1.4 million downloads, narrowly edging out Tapmad.



# Most-downloaded Finance Apps

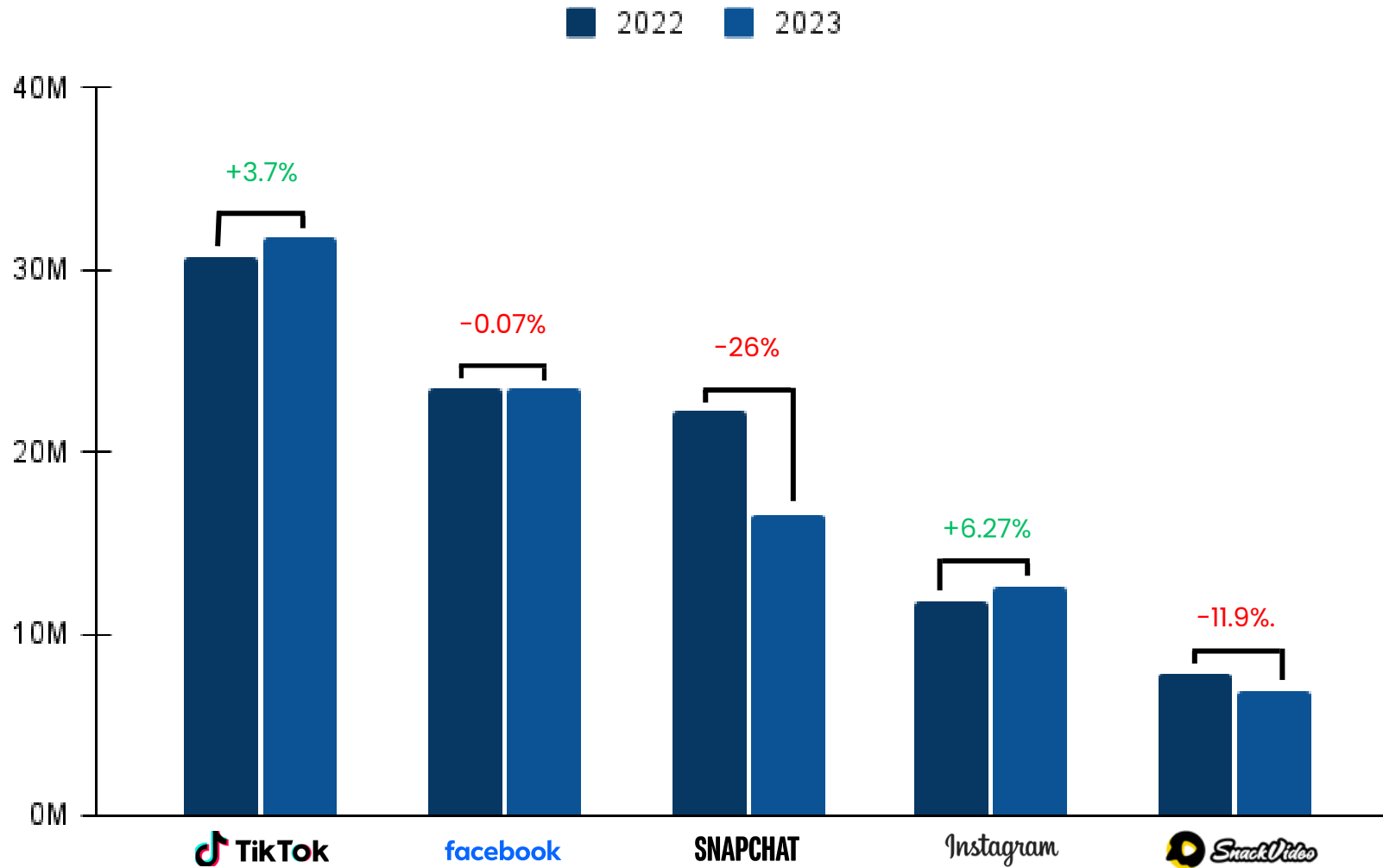


Data from the SBP shows that number of transactions through branchless banking players and digital wallets crossed the one billion-mark in Q4'23. Therefore, it was only natural that both of the top finance apps would be from the same category.

As usual, EasyPaisa dominated the chart, with downloads up 34.9% to 11.6 million. Meanwhile, JazzCash's installs slipped 3.9% though the platform remains the single-biggest processor of payment transactions in Pakistan.

Barwaqt also managed the third spot even though downloads were down sharply amid regulatory tightening, which Binance apparently evaded.

# Most-downloaded Social Media Apps

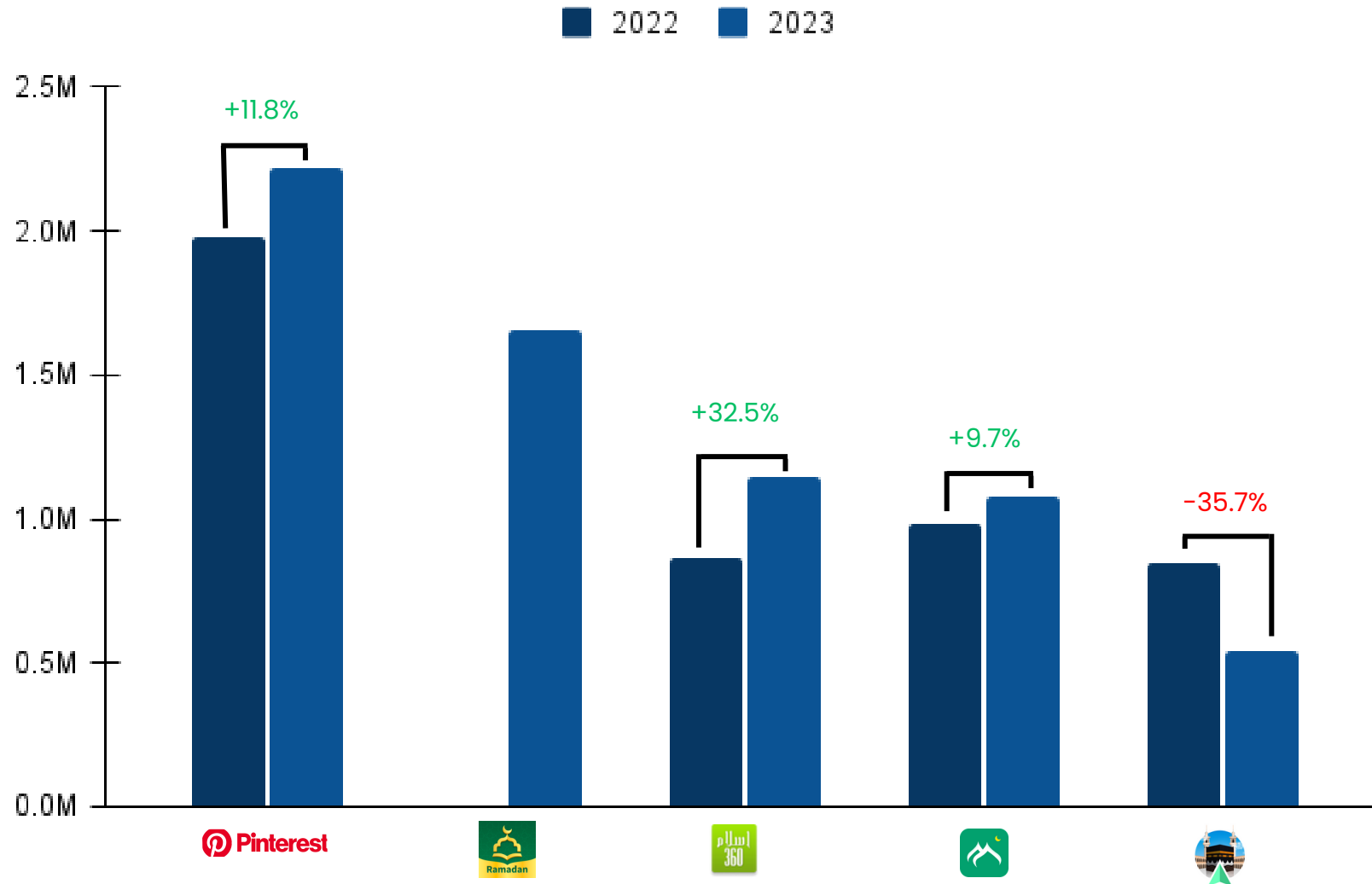


Perhaps least surprisingly, TikTok ruled the leaderboard among social media apps as its downloads clocked in at 31.8 million. Despite the largest base, it still represents the highest increase of 9.4%.

On a portfolio level, Meta was the biggest player as both Facebook and Instagram made it to the top five, with downloads of 23.5 million and 12.6 million, respectively – growing in single digits.

Meanwhile, Snapchat witnessed a steep decline in downloads by 26% to 16.5 million in 2023.

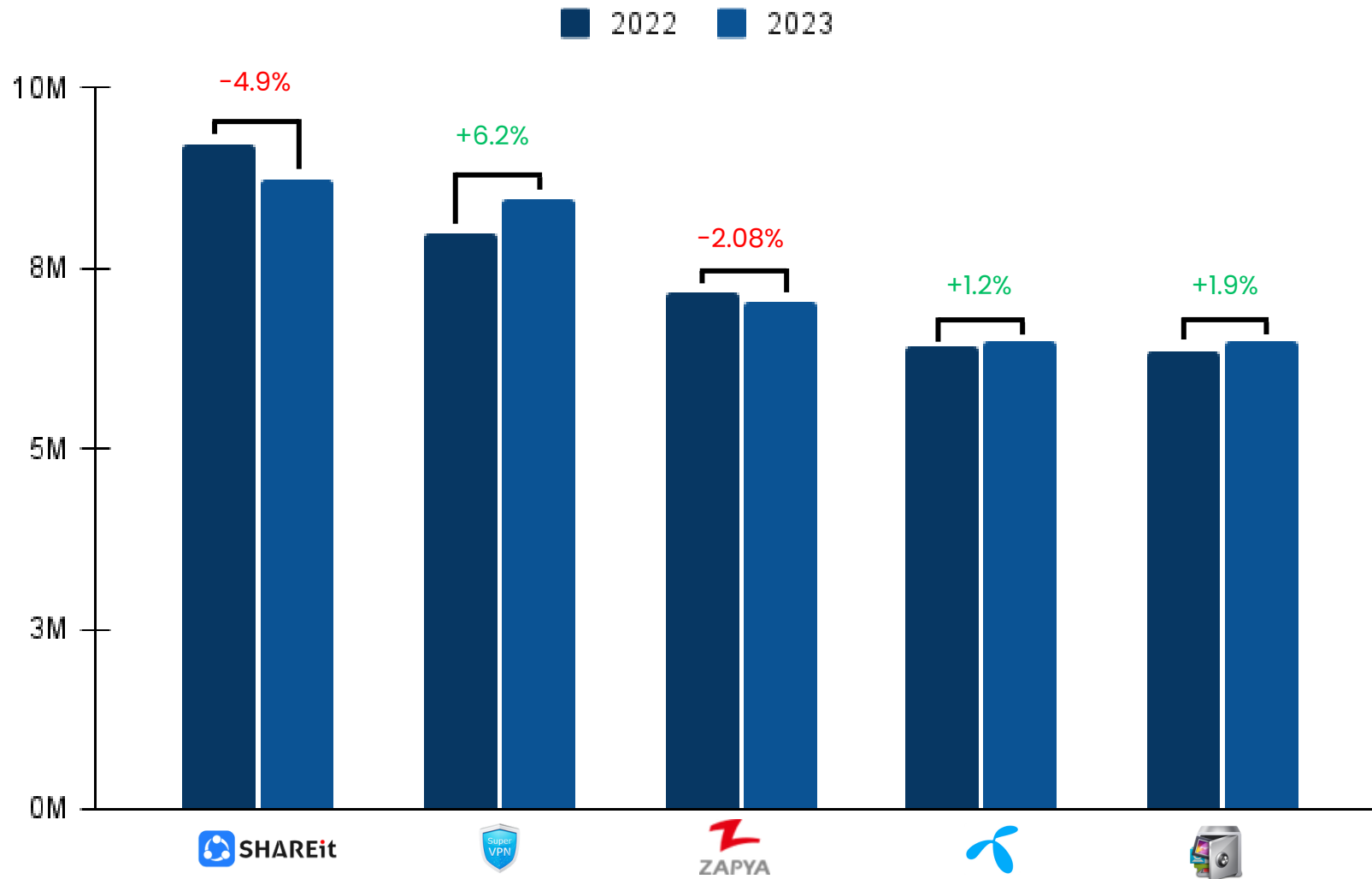
# Most-downloaded Lifestyle Apps



Unlike the previous three star-studded categories, lifestyle is much more low-key in region and not marked by market share battles. Here, Pinterest came on top with downloads up 11.9% to 2.2 million.

After this, the entire list was quite commoditized and manned by religious apps, which is a fairly competitive space. Interestingly, the leader was a new player by the name of WeMuslim, which shot to 1.7 million installs in less than a year since its launch. Consequently, Pakistan's own Islam360 was pushed into the third place.

# Most-downloaded Tools Apps

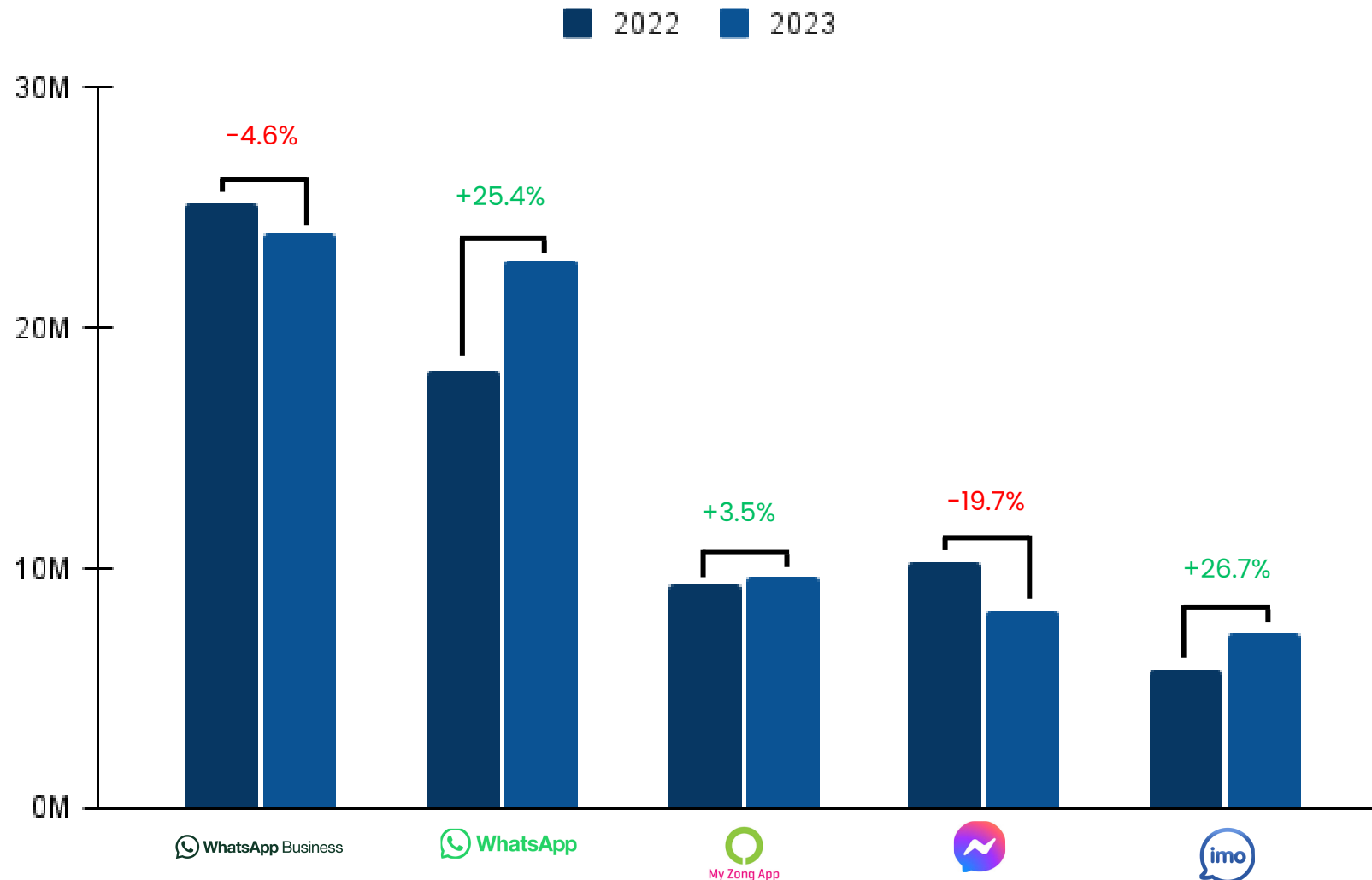


Utility & Productivity, which comprises Tools, is comfortably the largest genre of apps with downloads of 24.8 billion globally. In Pakistan too, the category dominates and typically makes up around a quarter of non-game installs.

The largest of them all was SHAREit with downloads of 8.7 million, albeit dipping 5% over the year before. Another file-sharing app appeared as the second runner-up.

SuperVPN came in second place, which is somewhat of a surprise given the level of internet restrictions imposed in Pakistan during 2023. Telenor too featured in the list.

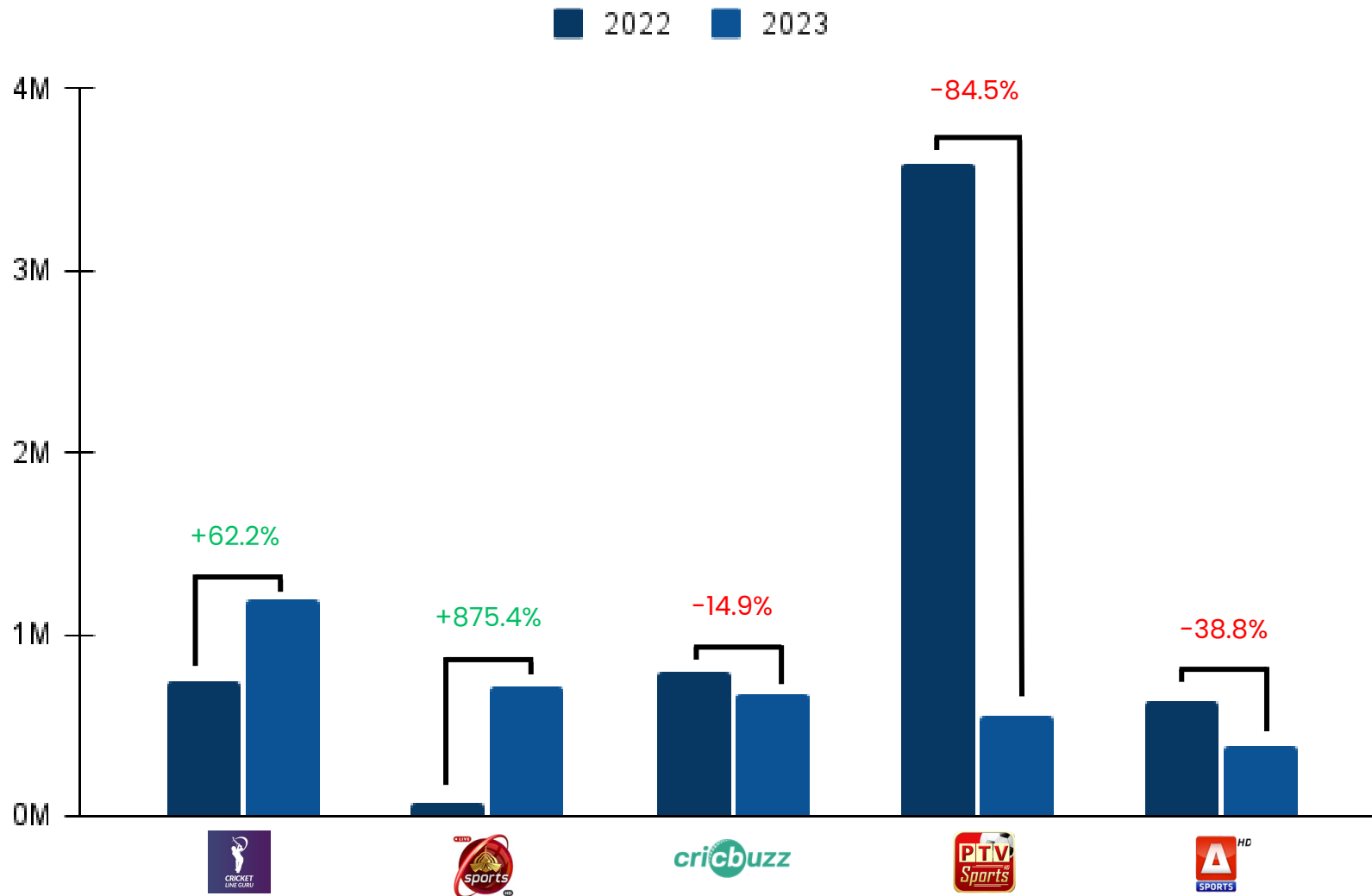
# Most-downloaded Communication Apps



In the world of communication, WhatsApp unsurprisingly ruled the charts with WhatsApp Business edging out the flagship product. However, downloads for the business version actually declined 4.6% to 24 million while those of the consumer app surged 25.4% to 22.8 million – narrowing the gap between the two.

Awkwardly sandwiched between global communication apps is MyZong with downloads of 9.7 million in 2023, up 3.5% over the preceding year. Meta once again featured but this time with its Messenger app in fourth place while IMO made it to the last spot.

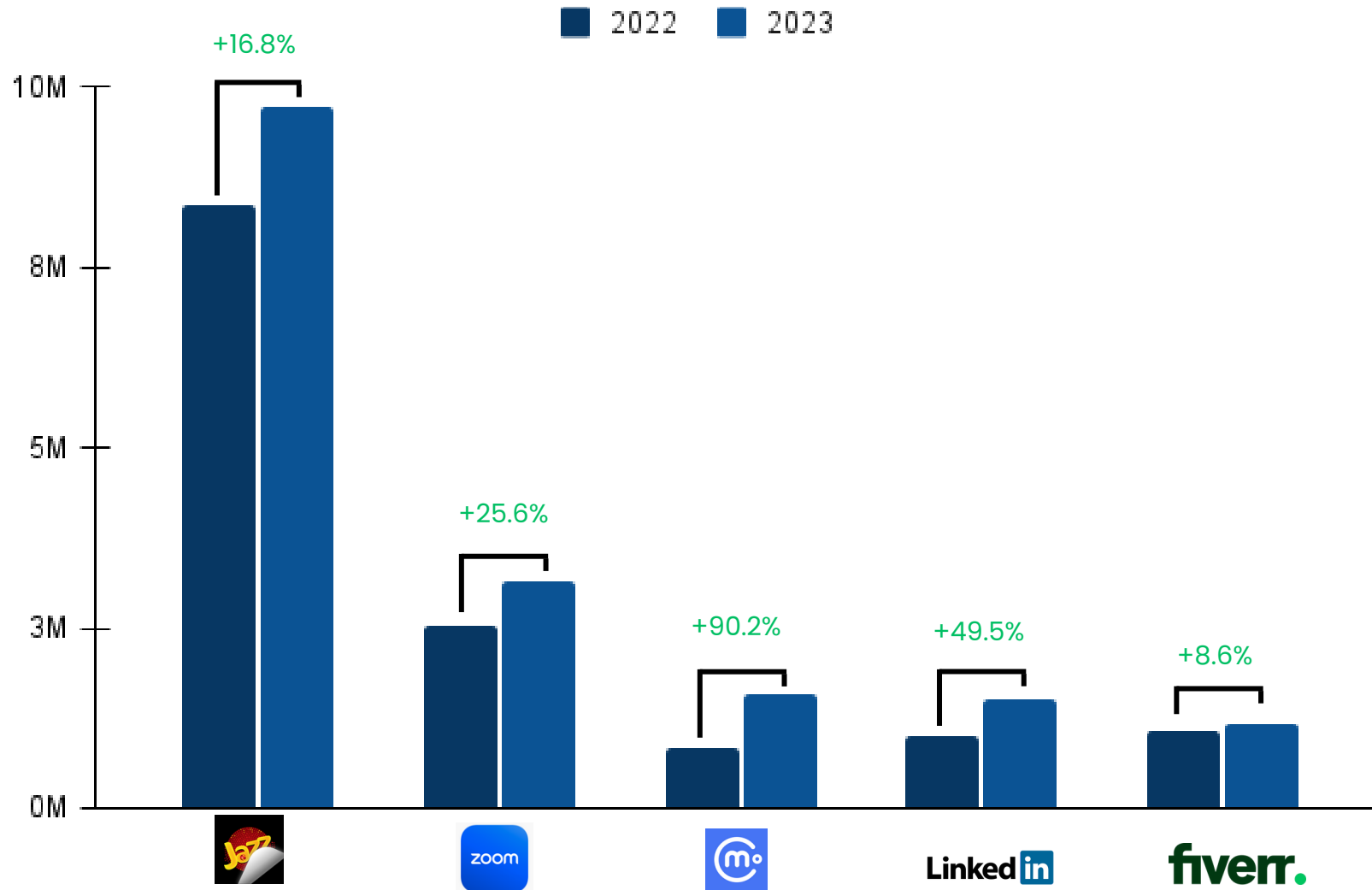
# Most-downloaded Sports Apps



For all the craze around sports (cricket) in Pakistan, dedicated sports apps didn't do all that well as full-fledged streaming platforms ate up their market share.

Only one product, Cricket Line Guru, managed to cross the one million-mark and recorded downloads of 1.2 million, soaring by 62.2% in 2023. Interestingly, two PTV Sports Live apps, from different publishers, featured in the list, indicating the state of piracy laws in the country. Unlike 2022, at least the official version managed to lead in downloads this year.

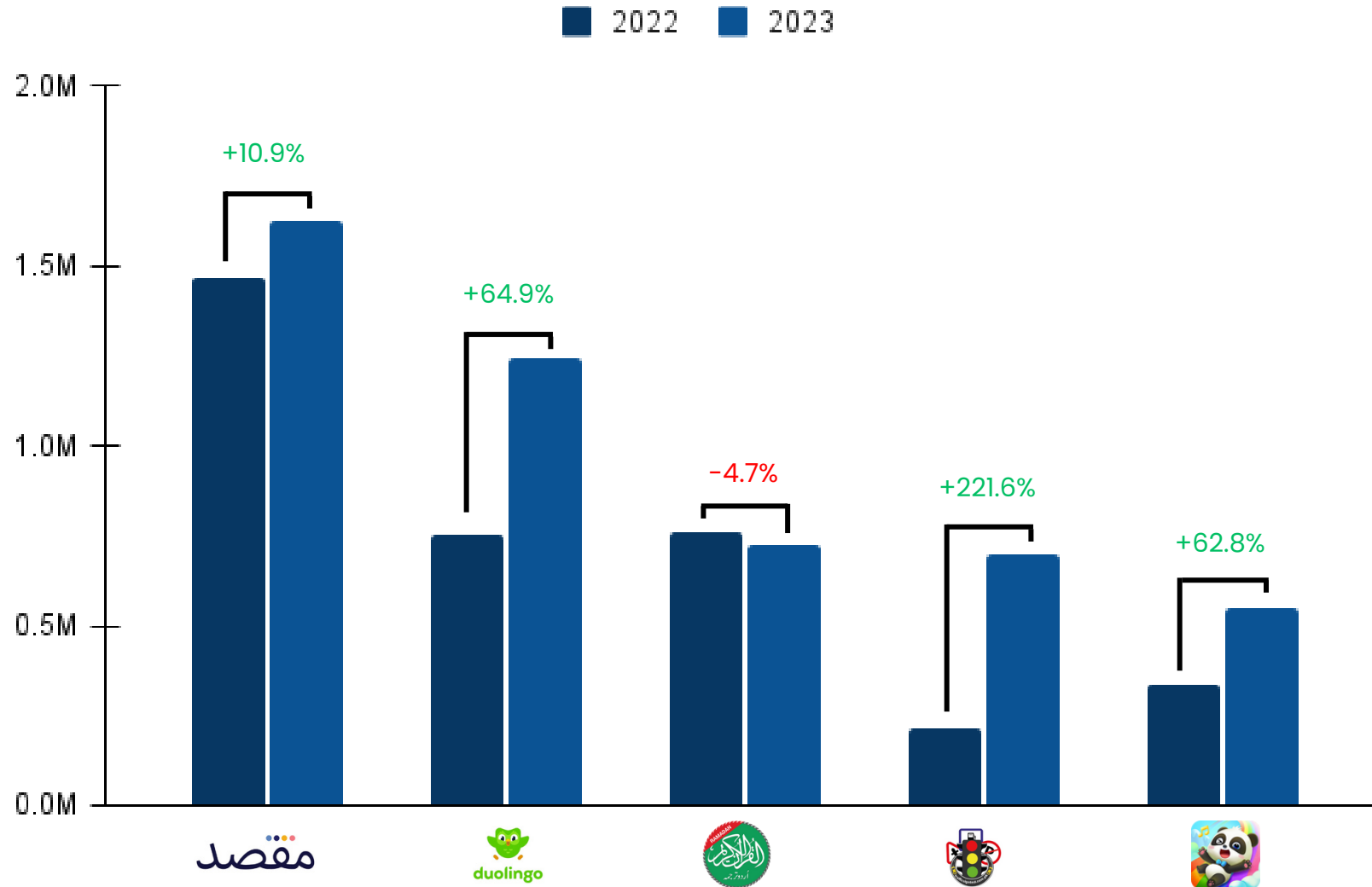
# Most-downloaded Business Apps



JazzWorld, the personal account management and lifestyle app by the largest telecom in Pakistan, was by far the biggest platform in the business category as downloads jumped 16.2% to 8.7 million in 2023. Zoom, the pandemic hall of famer, was a distant second with 3.2 million downloads.

On the the other hand, Pakistan's crypto craze remained unfazed as Cryptomania – a trading simulator – featured in the third place. Interestingly, this was ahead of more useful platforms like LinkedIn and Fiverr, where one can find sustainable income avenues.

# Most-downloaded Education Apps

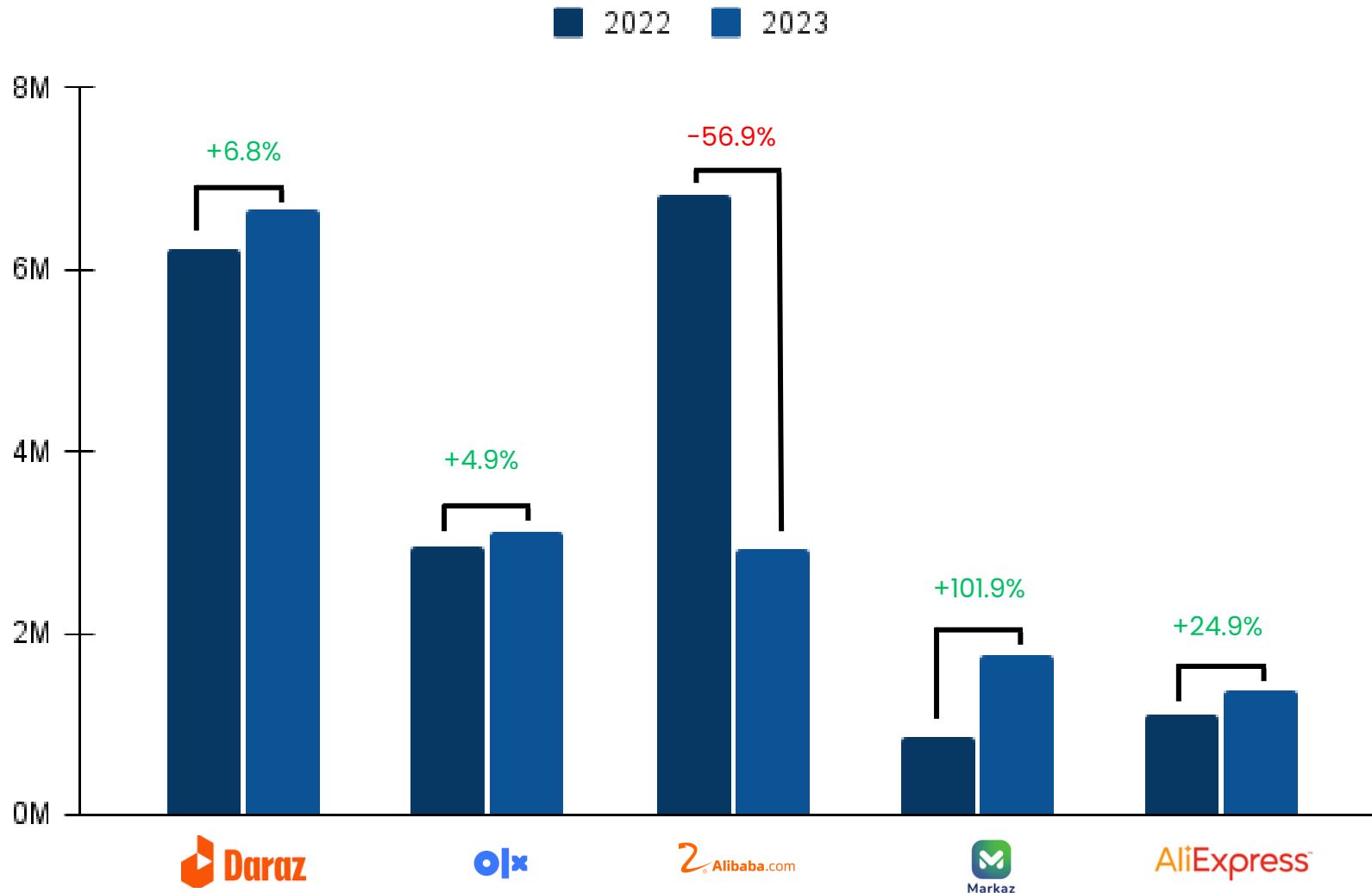


Perhaps the only major category where a local startup managed to top the leaderboard. Maqсад, the most-funded edtech in Pakistan, added 1.6 million new downloads, comfortably ahead of others.

However, the category didn't exactly feature any of its peers as such and included three commoditized apps: Quran with Urdu Translation, Traffic Sign Test, and Baby Bus. Meanwhile, the most successful education app globally stood in second place with downloads surging 64.9% to 1.2 million – not even 1% of its worldwide installs. As per Appfigures estimates, the language learning app made close to \$350 million.



# Most-downloaded Shopping Apps



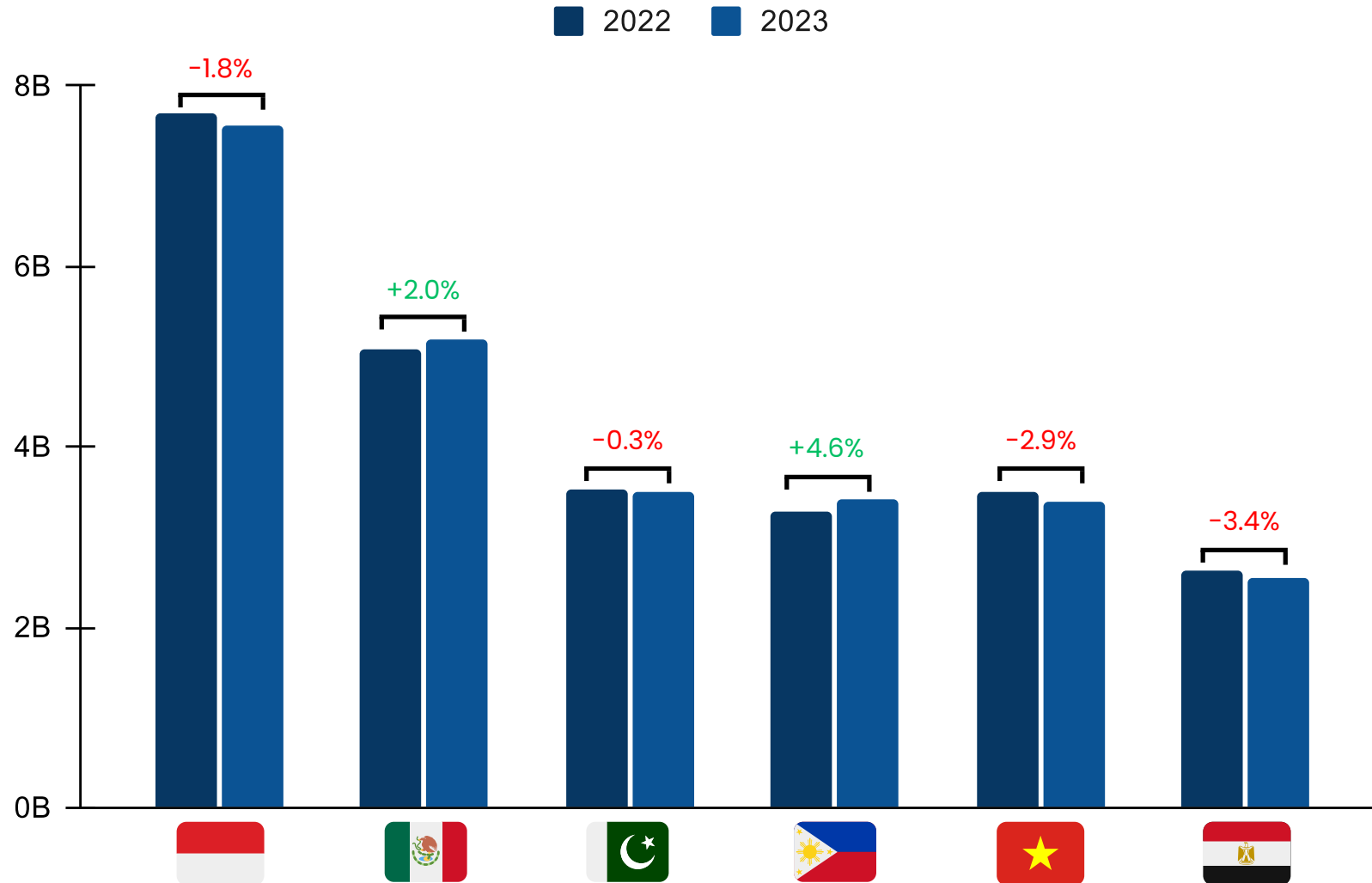
Amid the macros, 2023 wasn't generally a good year for shopping. Globally, the downloads in the genre edged up by a modest 0.5% to 6.26 billion in 2023. For Pakistan, this was a year of record inflation, steep currency devaluation and overall uncertainty.

Therefore, it shouldn't be surprising that cumulative downloads of top five shopping apps declined, singularly thanks to the 56.9% plunge in Alibaba. Three others managed to post modest growth, though the underlying intent may not necessarily be e-commerce since Daraz raked in a large number of downloads for cricket streaming.



# Pakistan vs. Peers

# Indonesia well ahead of others in downloads

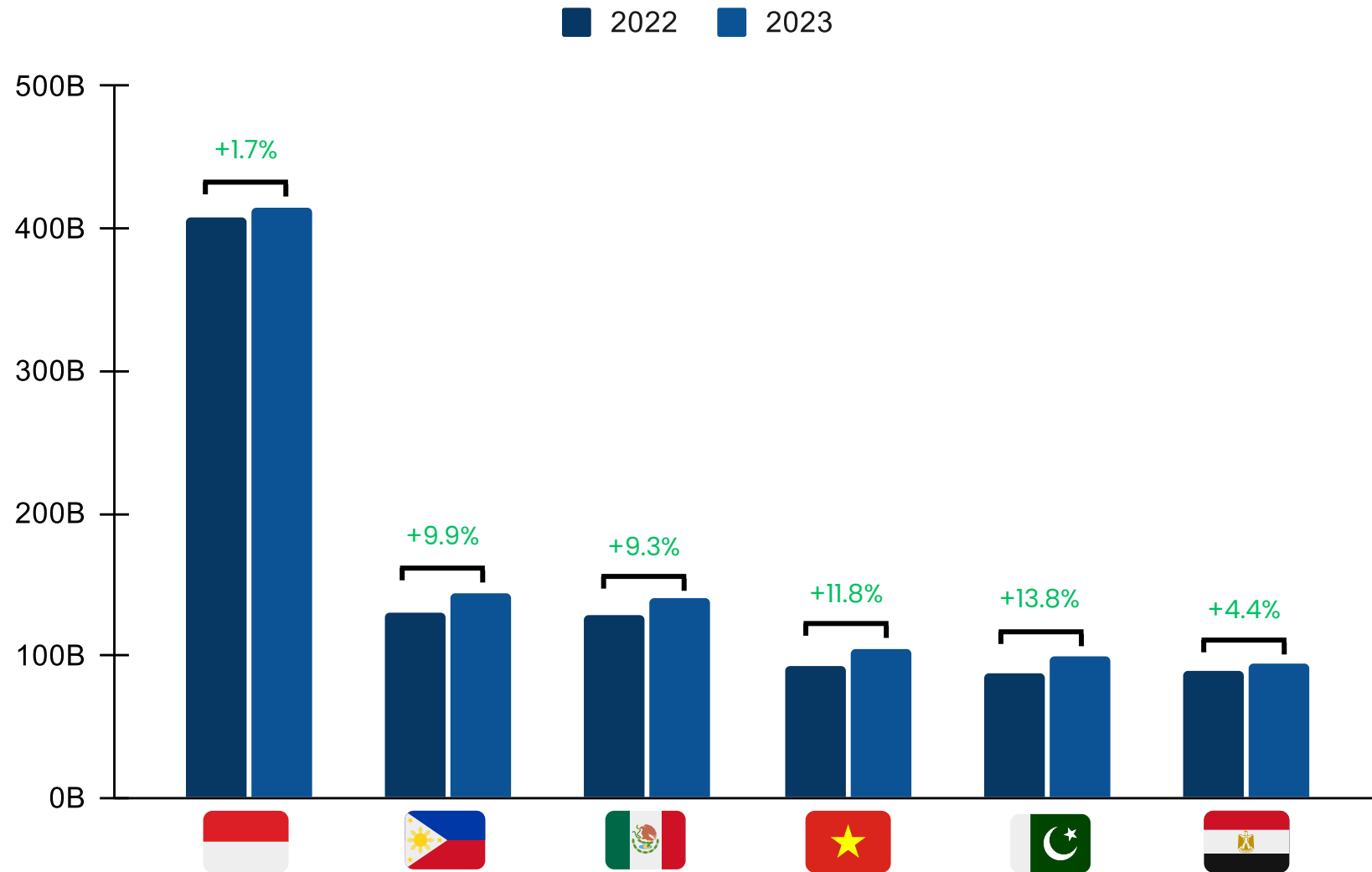


Even though Pakistan's downloads edged slightly lower in 2023, it was far from the only one. In fact, three more markets in our sample witnessed decline,, all relatively steeper with Egypt recording the sharpest contraction at 3.4%.

Vietnam was second in line as its downloads slipped 2.9% to 3.39 billion while Indonesia followed behind with a 1.8% decline in 2023.

On the other hand, the Philippines bucked the trend and rose by a decent 4.6% tp 3.42 billion, surpassing Vietnam in terms of downloads. Mexico too managed an additional 100 million downloads during 2023.

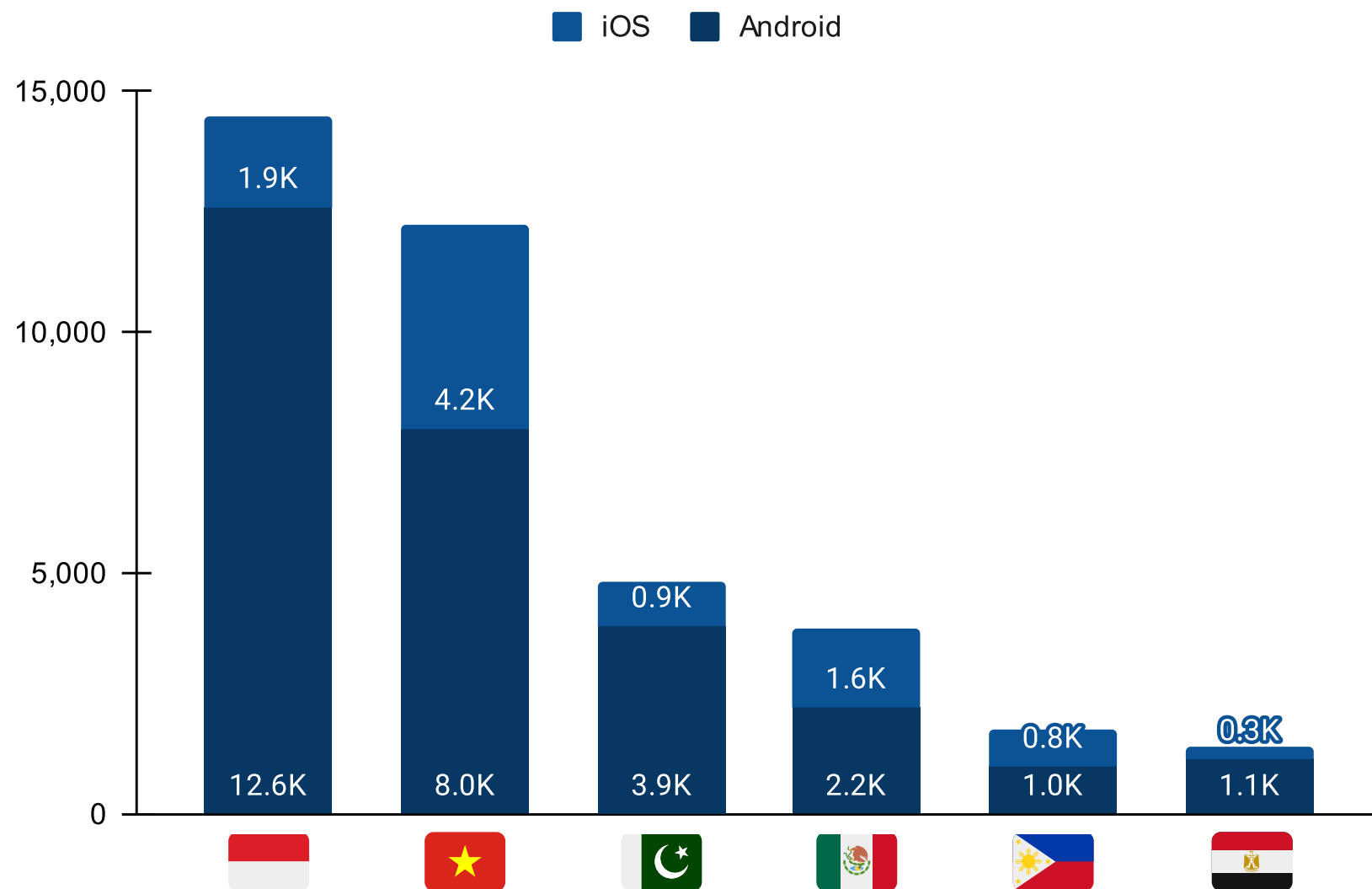
# Pakistan leads the way with highest growth rate in hours



Notwithstanding the muted performance on downloads, total hours spent on mobile (Android) in most big markets continued to grow. Unsurprisingly, Indonesia led in absolute value with 415 billion hours in 2023, more than the other countries in our sample combined. However, its growth was the lowest, probably due to a high base.

Both the Philippines and Mexico were neck to neck with total hours of 144 billion and 144 billion, rising by 9.9% and 9.3%, respectively. Meanwhile, Pakistan spent 99 billion hours, recording the highest growth of 13.8% in the sample. Remember, Data.ai recently changed its algorithm for hours spent, which pushed Pakistan down the pecking order.

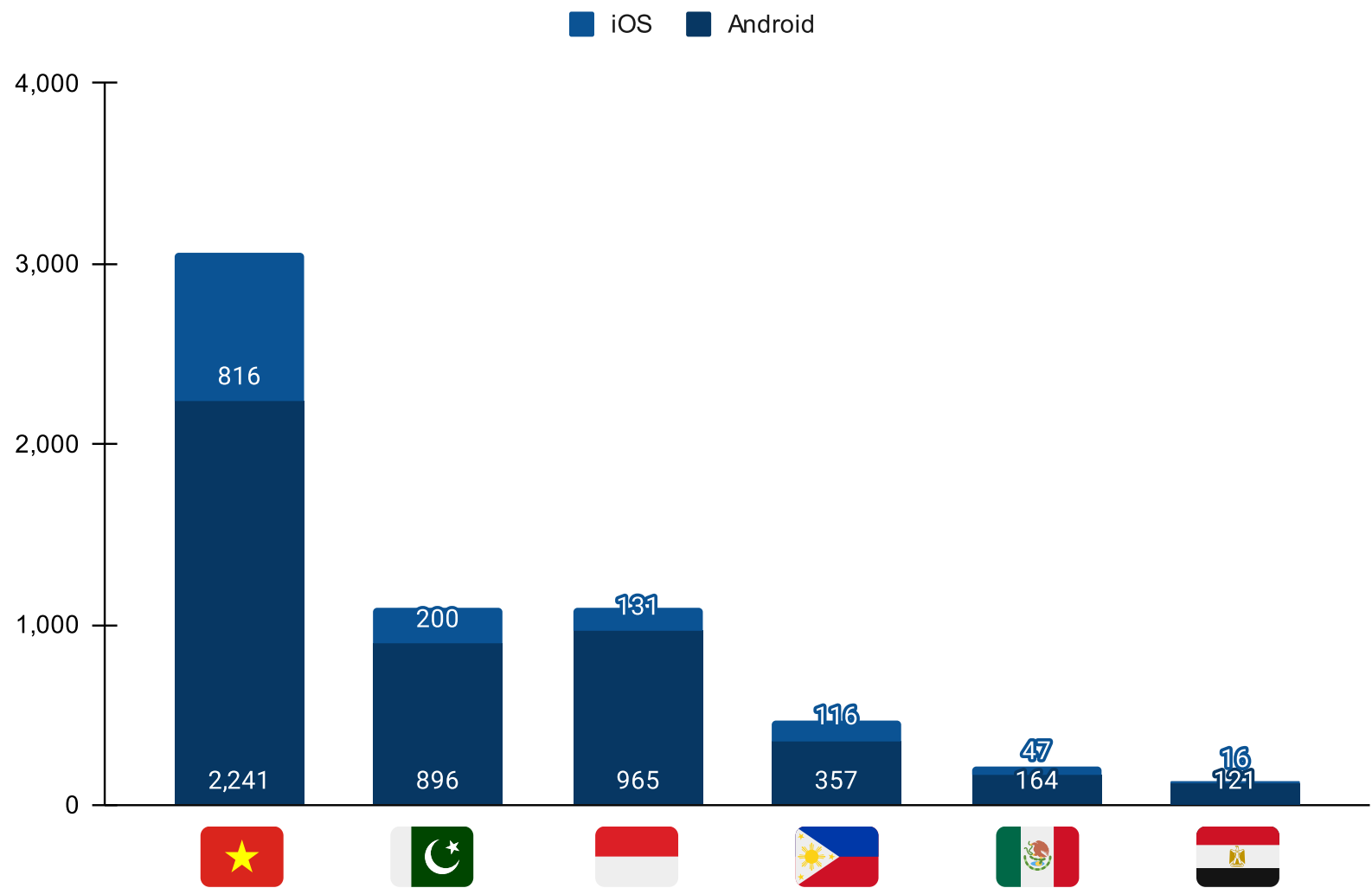
# Vietnamese developers produced most iOS apps in 2023



Similarly, Indonesian developers also released the highest number of total apps in 2023, at almost 14,500. However, Vietnam led on iOS with new 4,243 apps over the year – more than 2x of the closest peer. This is in line with Vietnam’s successful strategy of building export-oriented products where iOS has a much higher monetisation potential.

Meanwhile, Pakistani developers released 4,800 apps across the two stores in 2023, of which four fifths were on Google Play. Both Egypt and the Philippines lagged behind with fewer than 2,000 apps published. However, do keep in mind that not all developers publish apps directly and can partner up with third-party platforms to optimize growth.

# Vietnam and Pakistan produced the most games in 2023

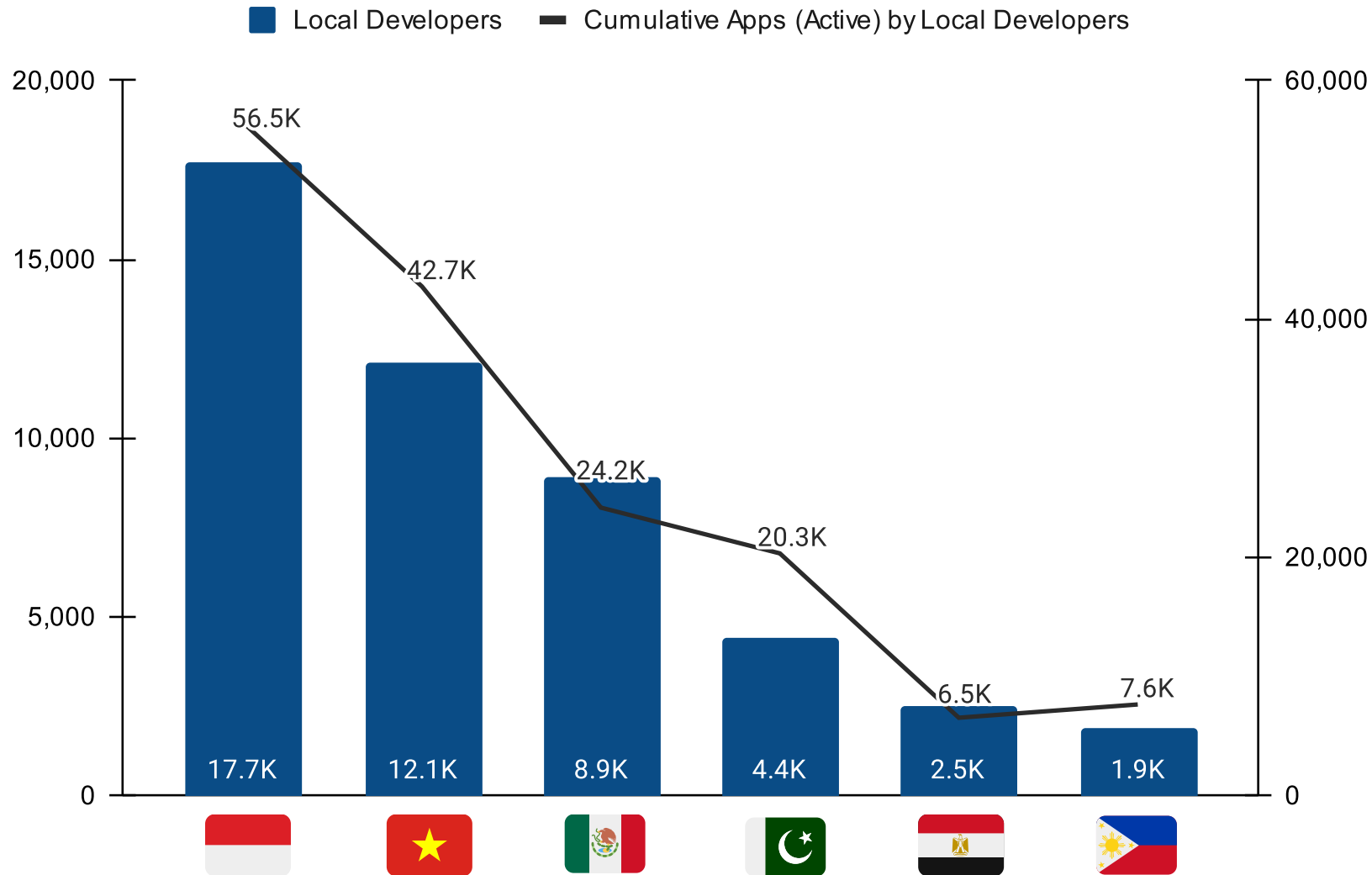


Pakistan's performance here was heartening as it stood in second place by overall games published in 2023. The country released almost 1,100 games across the two stores, with 18.2% of them being on iOS. This was exactly on par with Indonesia.

Meanwhile, Vietnam was comfortably in the top spot with over 3,000 games published by local developers in 2023. Again, its export-oriented approach was visible with the share of iOS at 26.7%. In absolute numbers, Vietnam released more games in total than all countries combined.

On the other hand, Mexico lagged in this department with a little over 200 games coming out in 2023 while Egypt failed to even hit the 150-mark.

# Indonesia leads in both local developers and downloads



Rather unexpectedly, Indonesia stood out with not only the highest number of developers at 17,700 but also the most local developed apps at 56,485. On both indicators, Vietnam and Mexico followed behind in second and third places, respectively.

Pakistan was firmly in the fourth spot with around 4,400 developer accounts across the major app stores who had published more than 20,000 applications between them. Meanwhile, Egypt lagged behind all others despite having a relatively higher count of domestic publishers.

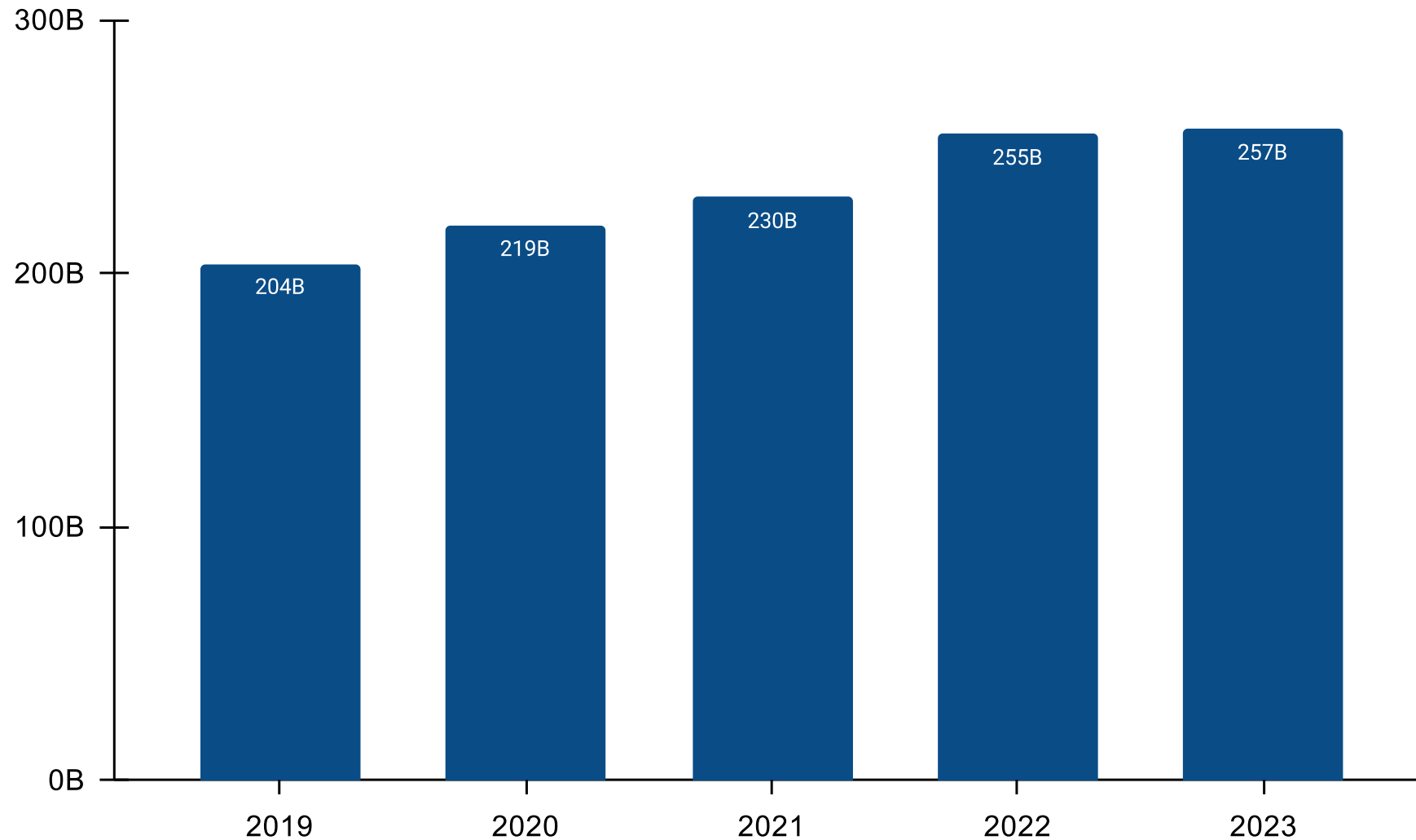
To reiterate, figures of both the metrics are a little understated as developers sometimes domicile their accounts abroad or publish under third-party players.



# The Global Context



# Global app downloads up 0.8% from 2022

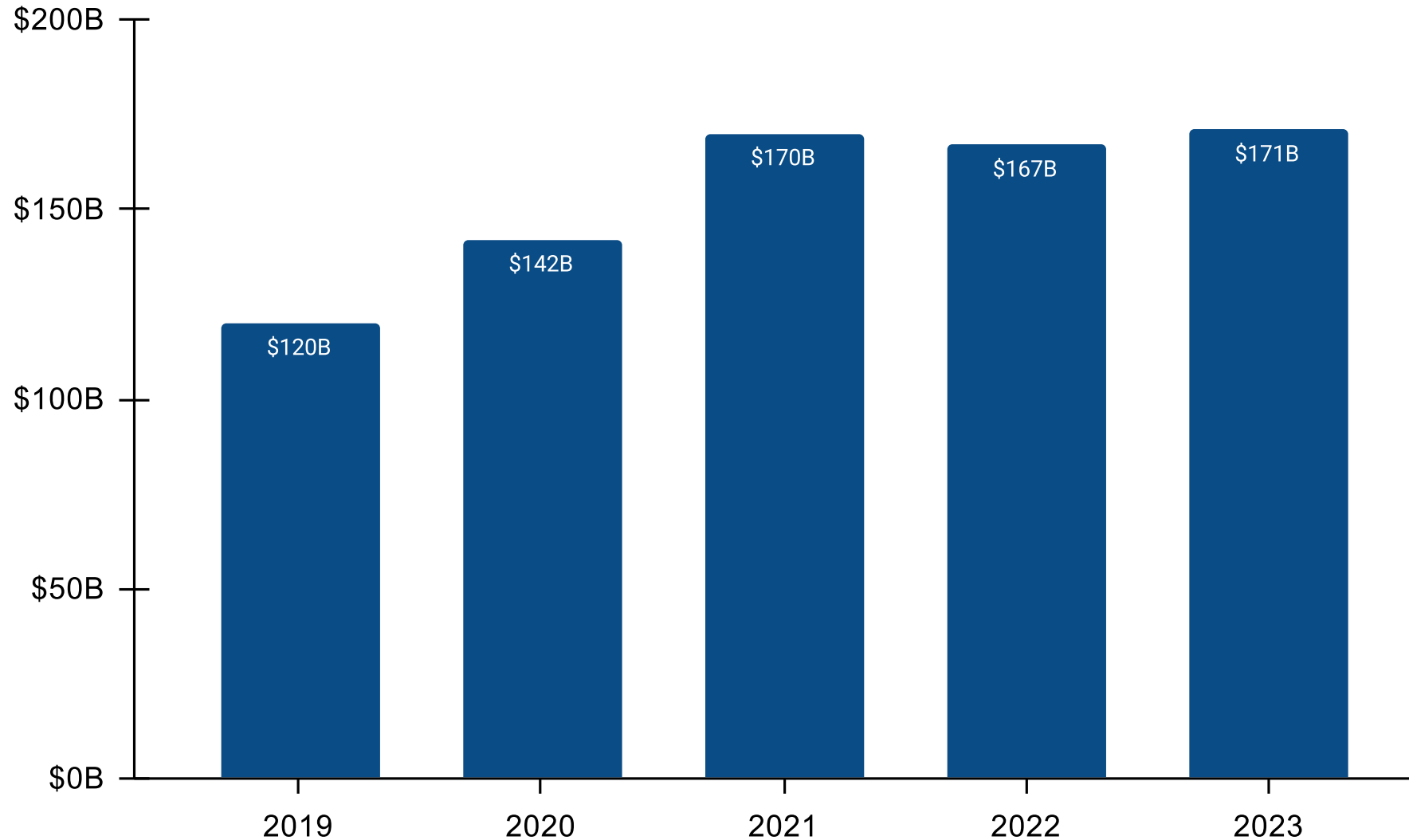


Across the world, new app downloads hit 257 billion in 2023, up 0.8% from 2022. This is comfortably the lowest rate of increase since at least 2017 and a fraction of the 7% compound annual growth rate over this period.

According to Data.ai forecast, the 7-year CAGR is expected to further decline and global new downloads will reach 347 billion by 2030.

Many top 20 markets helped drag down the growth, including India where downloads fell 8.5% to 26.4 billion. Brazil, Indonesia, Vietnam among others also witnessed a downward trend.

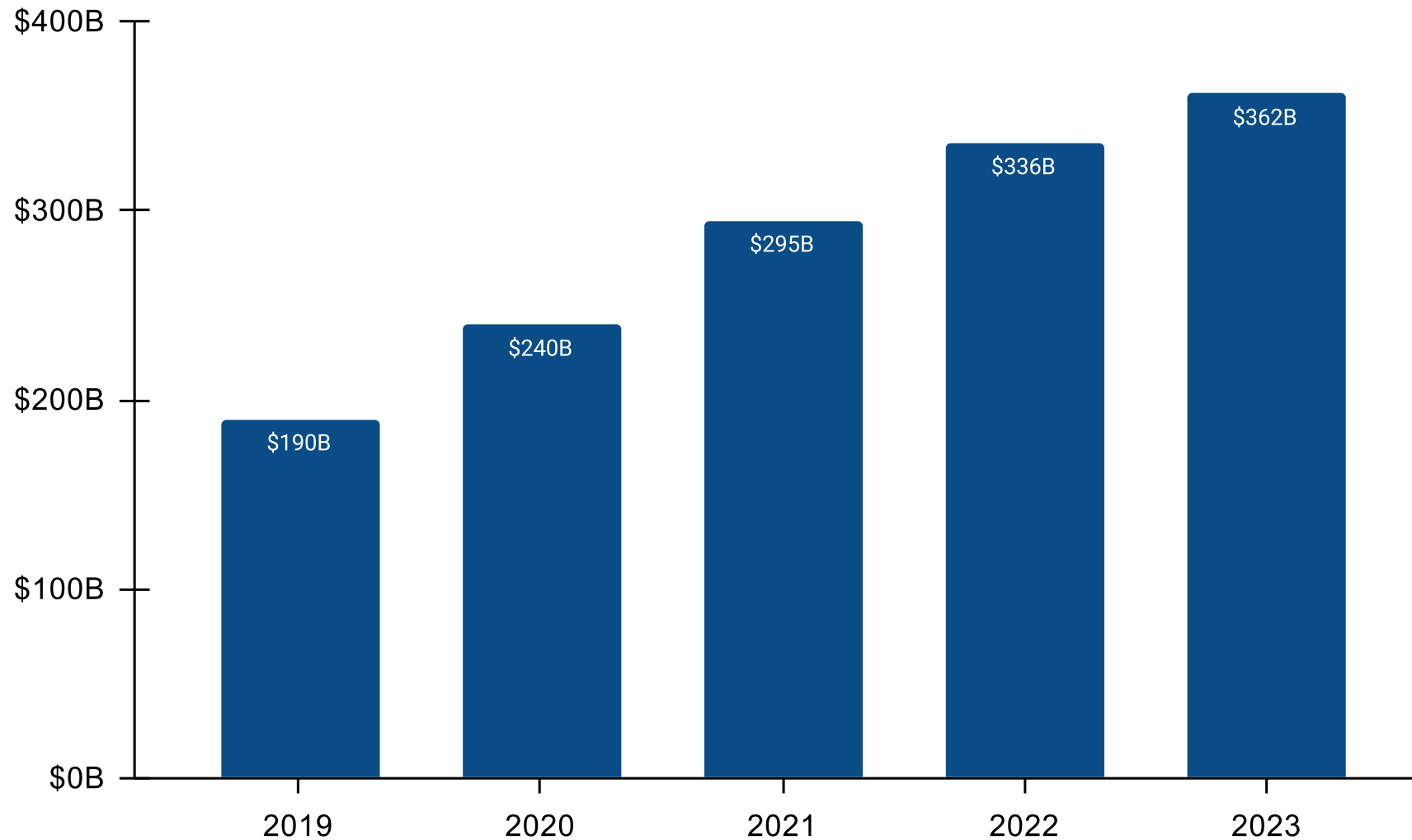
# Global consumer spend shows slight uptick



Amid rising inflation levels and the resulting pressures on disposable incomes over the last two years, consumer spend on Google Play and Apple app stores has witnessed a noticeable slowdown. In 2023, consumer spend inched up 2.4% to \$171B.

While only a fraction of the 12.3% CAGR since 2017, it is still an improvement compared to the 1.8% decline witnessed in 2022. Over the next seven years, the rate of increase of consumer spend will stall with CAGR of 7.3% and spend expected to reach \$288B by 2030. Among major markets, China saw sharp contraction as spending dipped 10.1% to \$52.1B in the outgoing year.

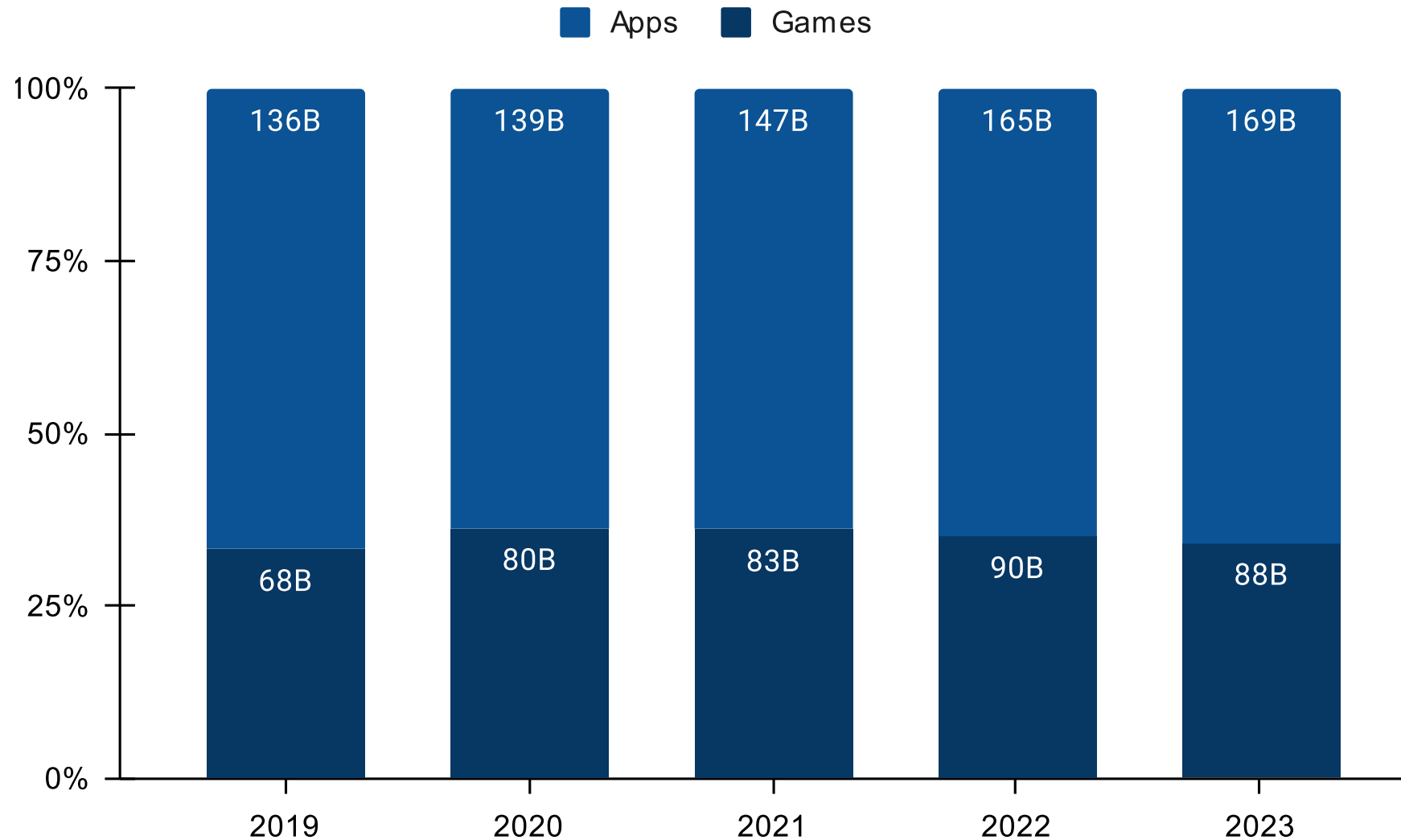
# Global mobile ad spend grows steadily YoY



Even as growth in consumer spending has tapered off, led by games, global mobile ad spend has continued to power through and reached \$362B in 2023, up 11% from \$336B the year before.

In relative terms too, the growth in mobile ad spend outpaced that in 2022 at 7.5%. This rate of change will maintain and the absolute value is expected to hit \$402B in 2024 as advertisers increasingly turn towards mobile for reaching out to potential customers.

# Global Downloads: Apps vs. Games

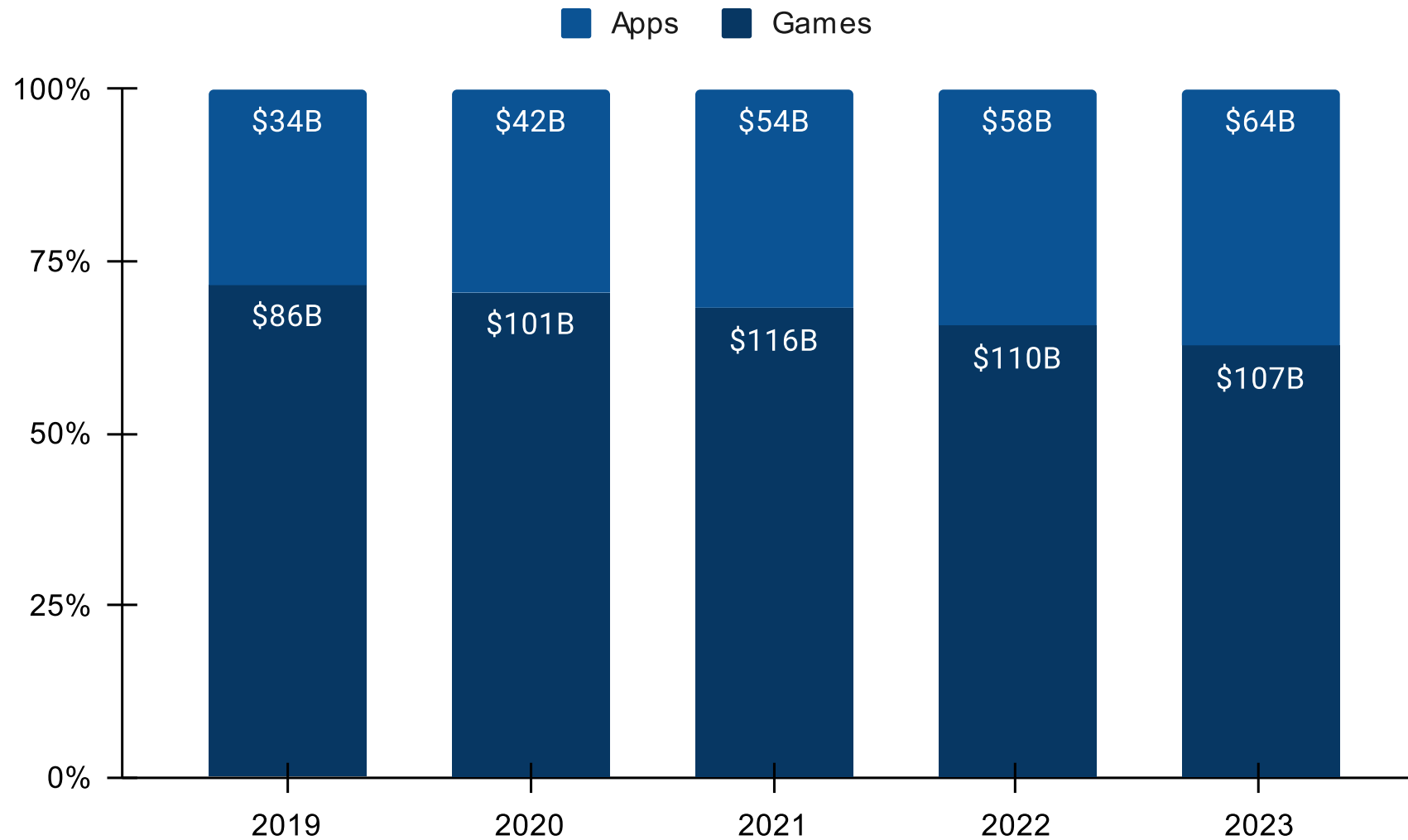


Of the 257 billion global downloads, apps made up almost two-thirds at 169 billion while games accounted for the remaining 88 billion.

Broadly, the respective shares are well in line with historical levels, albeit a slight increase in favour of apps, which edged up 2.3% YoY in absolute terms.

Though the slowest rate of change since at least 2018, it was still considerably better than games whose downloads slipped 2% – again, the first instance of decline in six years.

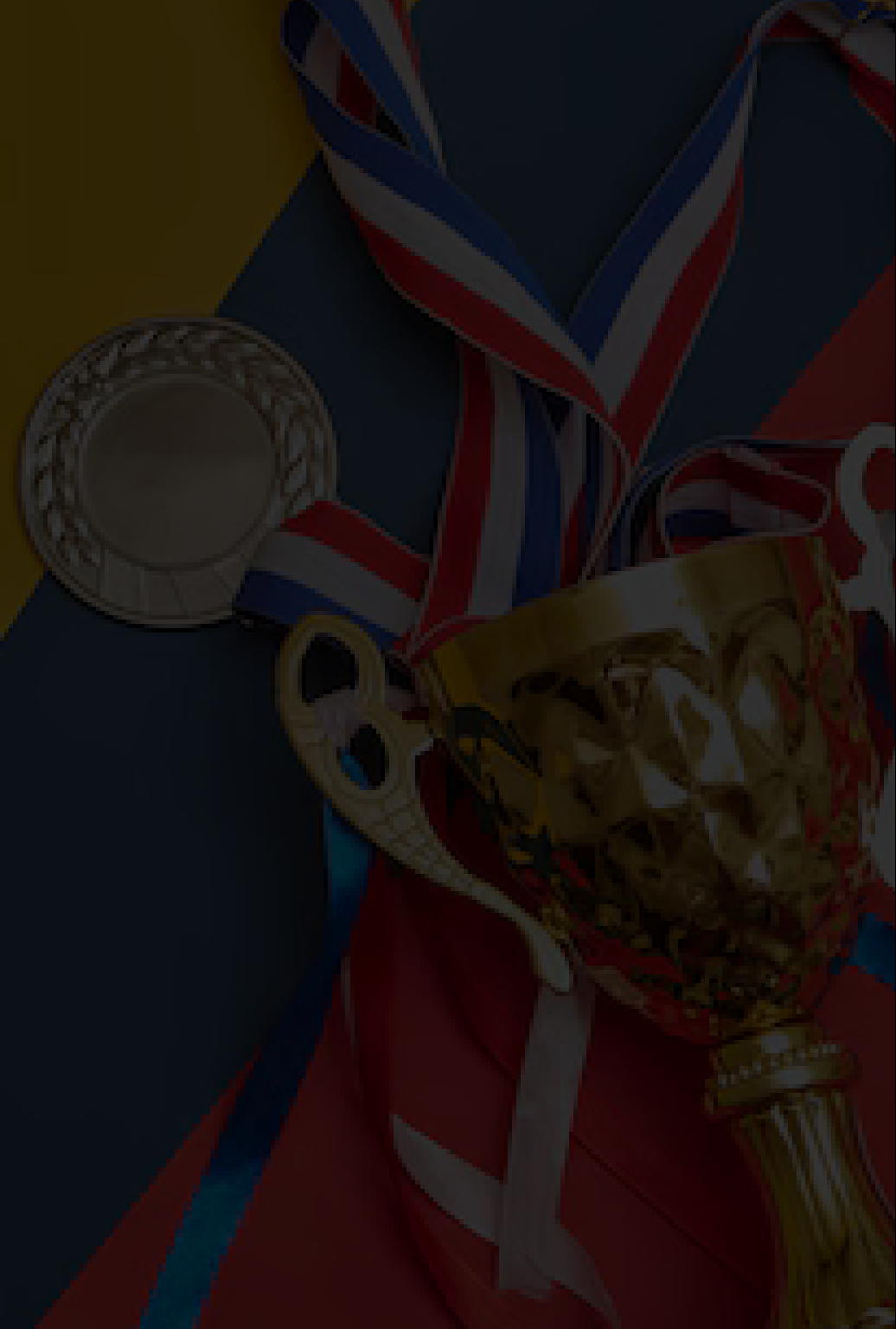
# Global Store Spend: App vs Games








The entire slowdown in overall consumer spend was driven by games, which fell 2% to \$107.B in 2023 – the second year straight of decline. As a result, the share of games in total spending also hit the lowest of just 62.6%, compared to 71.7% back in 2019.

On the other hand, apps performed decently as consumer spend bounced back 11.3% to \$64B in 2023, doing away with the single-digit growth seen last year. Over the last seven years, spending on apps has increased at an impressive CAGR of 24.4%, which will moderate to 11.1% between 2024 and 2030.






# Leaderboard



# Most downloaded apps in Pakistan






	APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
	TikTok	ByteDance	31.8M	Social Media
	Whatsapp Business	Meta	23.9M	Communication
	Facebook	Meta	23.4M	Social Media
	Whatsapp Messenger	Meta	22.8M	Communication
	CapCut	ByteDance	20.6M	Video Player & Editor

# Most downloaded games in Pakistan






	APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
	Yalla Ludo	Aviva Sun	11.2M	Board
	Subway Surfers	Sybo Games	10.2M	Arcade
	Ludo Star	Gameberry Labs	10.1M	Board
	Ludo King	Gametion Global	8.3M	Board
	PUBG Mobile	Level Infinite	6.4M	Action



# Most downloaded apps developed in Pakistan

	APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
	Photoshot	Vyro AI	14.9M	Photography
	Remove It - Remove Objects	Vyro AI	12.4M	Photography
	Imagine - AI Art Generator	Vyro AI	12.5M	Art & Design
	Easypaisa	Telenor Microfinance Bank	12.0M	Finance
	Tamasha	Beyond Digital	11.9M	Entertainment

# Most downloaded games developed in Pakistan

	APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
	Ramp Car Games: GT Car Stunts	Fun Drive Games	46.0M	Simulation
	Car Driving School : Car Games	Spark Game Studios	32.9M	Strategy
	FPS Commando Shooting Games	Hazel Mobile Games	22.2M	Adventure
	Dude Theft Wars Shooting Games	Poxel Studios Games	21.3M	Action
	Army Vehicle Transport Truck	Play Zee	15.6M	Simulation



# Portfolio Spotlight: Jazz



# Portfolio Spotlight

App Name	Category
Tamasha	Entertainment
Jazz Cash	Finance
Jazz World	Business
Bajao	Music
BIP - Messenger	Communication
Jazz Cricket	Sports
Jazz Islam World	Lifestyle
Taqdeer	Entertainment
Jazz Drive	Tools
Jazz Smart Plus	Entertainment

App Name	Category
Jazz Parho	Education
Deikho	Entertainment
Jazz Mosafir	Travel
Jazz Game World	Entertainment
Garaj Drive	Productivity
Rung	Entertainment
StarTalks	Entertainment
JobUp	Business
Jazz Discount Bazaar	Food & Drink
Rox	Business

In the last two years, Pakistan has emerged as a major volumetric consumer market, standing in ninth place globally by the number of downloads. However, most of that demand is presently channeled towards foreign products, be it social media to communication. Pakistani publishers remain largely missing from this big and growing market, as evidenced by the few local apps consistently featuring in the top charts.

Jazz Pakistan is one of the exceptions in this regard and is arguably the largest Pakistani publisher focused on the local market. Ever since its unbundling of the super app in 2019, and even before, the telco has aggressively expanded its footprint across major apps categories, from financial services (JazzCash) to entertainment (Tamasha) among others. In fact, it is currently the only Pakistan-based and focused developer with three unique apps over the 10M+ installs mark, with Jazz World now having surpassed 50M+. Not only that, each of its three apps boast at least 10 million unique monthly active users as of 2023 – a rather unique feat.



# Key Numbers

**~260M\***

**TOTAL DOWNLOADS**

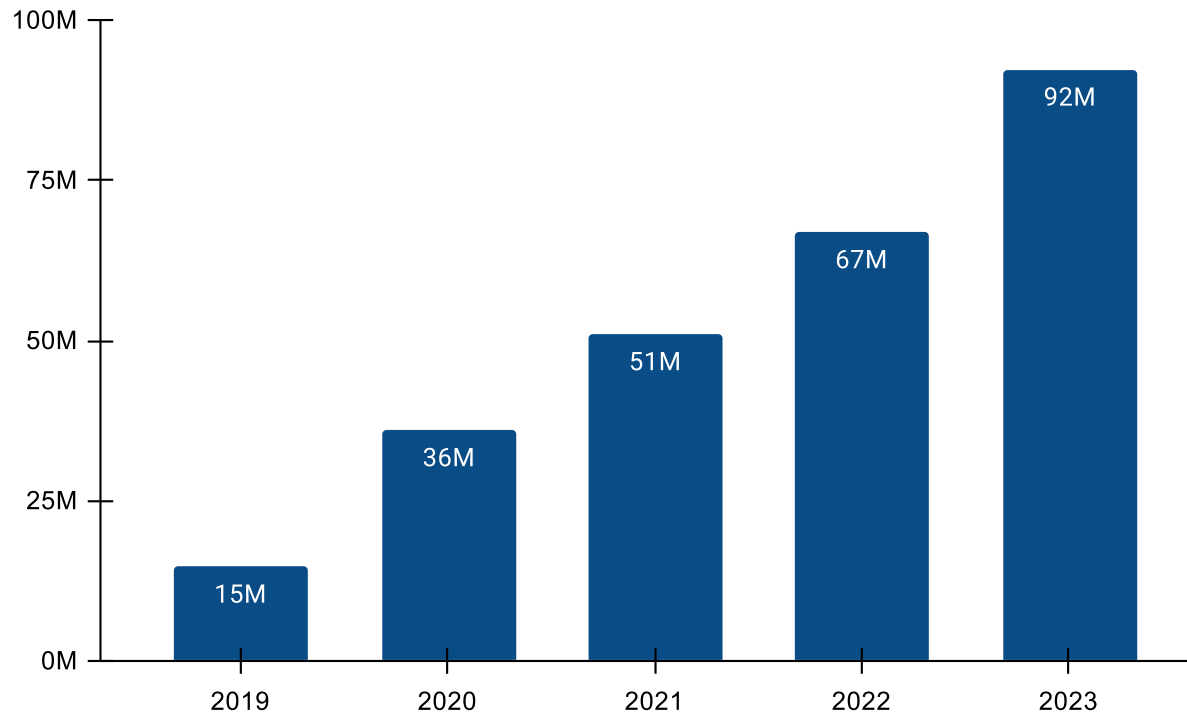
**20**

**NUMBER OF APPS**

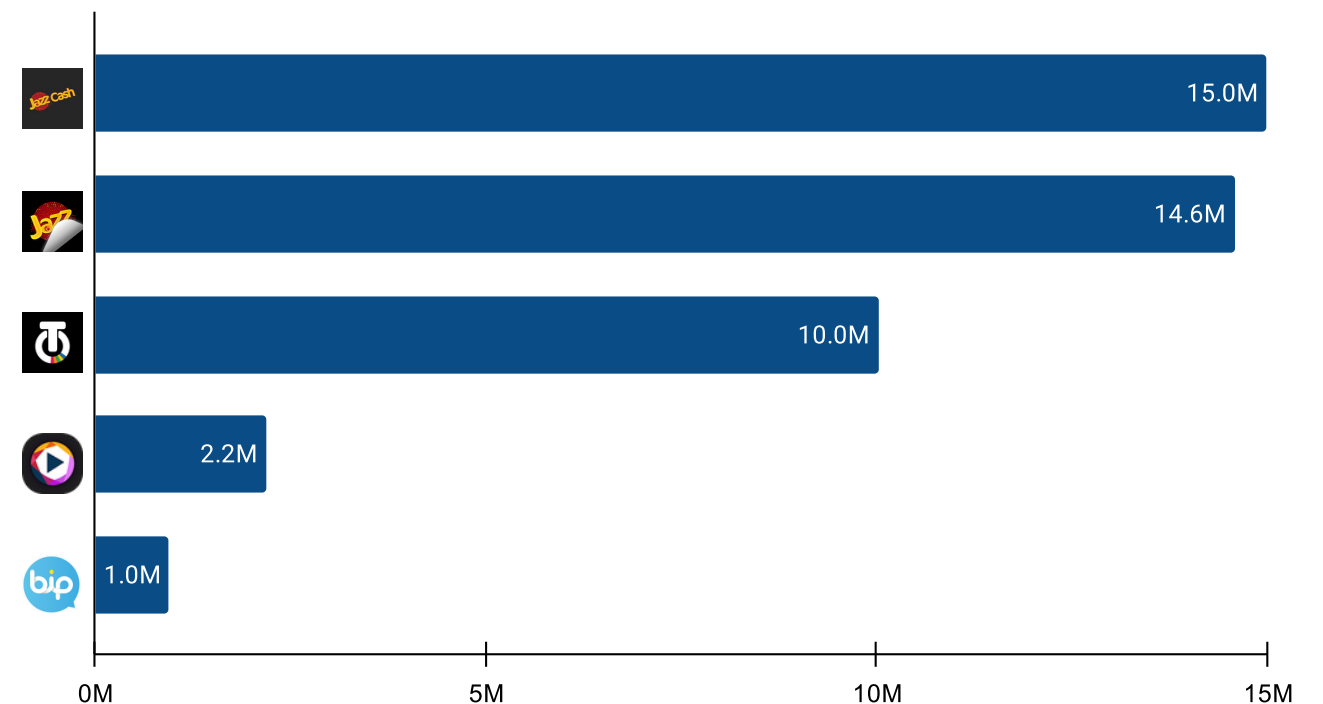
**3**

**APPS WITH 10M+ MAU**

PORTFOLIO CUMULATIVE DOWNLOADS



APPS WITH MOST MONTHLY ACTIVE USERS



Source: Jazz, AppFigures. | \*In the last five years.

Note: The download numbers added here are not unique and thus are higher than the numbers reported for Jazz portfolio apps in other sections of the report.

# About: Data Darbar

Data Darbar is a data + media startup trying to bring transparency in private markets across emerging economies. Our benchmarking reports and analyses provide a comprehensive overview of market trends, investment opportunities, and emerging sectors, empowering decision-makers with actionable intelligence. Since starting in 2022, we have become a credible source of data and insights on issues as well as opportunities related to the digital economy.

Our work is trusted by: **Bloomberg** **rest of world**  **+wamda** **fDi Intelligence** 



**Mutaher Khan**

*Co-Founder*

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Mutaher Khan is the co-founder of Data Darbar and has been mapping Pakistan's financial and technology sectors for the last six years. He has previously worked for Mettis Global and Dawn.

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**Natasha Uderani**

*Co-Founder*

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Natasha Uderani is the co-founder of Data Darbar and has been involved with some of the leading tech startups in Pakistan, including Careem & Cheetay before joining NIC Hyderabad as a Startup Engagement Manager.

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# Our Team



**Muhammad Rafay**  
Analyst



**Susheel Vankwani**  
Analyst

# Partners

appfigures





# About: Begin

Begin.Watch is an Emirati streaming service that broadcasts entertainment & live sports.

Starting its services in Pakistan, Begin.Watch will then expand to the rest of South Asia and GCC. They will be the first platform in the region to offer a unique mix of content which combines English language entertainment with Urdu and Bengali hits and international sports with local events like cricket, volleyball, and hockey.

The platform secured its seed funding back in 2023 from venture accelerator Z2C Limited and has been working on their technology stack and business model. In the meantime, they have exclusive and non-exclusive locked content deals with Sony Pictures, Paramount Global, NBC Universal, Warner Brothers and Disney Studios.

**Official Content Partners:**



**NBCUniversal**





Jonathan Mark

*Chief Commercial Officer*

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Jonathan began his media career as the advertising sales head for Star TV & Zee Networks. After leading the launch of KTN, Pakistan's pioneering Sindhi language channel, he later served as the sales director at Samaa TV and director of sales at CNBC Pakistan before joining MHL as the CCO. He is the founding member of Begin.Watch where he sources programming opportunities & partnerships with external content teams to help deliver diverse content for audiences in South Asia & the GCC region.

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Fatima Hyder

*Chief Strategy Officer*

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Fatima has a two decade track record in strategic planning and brand launches, working in Canada, the Emirates, and Pakistan. As chief strategy officer of Z2C Limited, she has leads corporate venturing for the venture accelerator. Since taking on the role, Z2C Limited has invested in eCommerce, sports, entertainment, data, and measurement companies. She helps founders invent, launch, and scale innovative businesses that leverage and reinforce their core capabilities.

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# Pakistan's Streaming Landscape

## International Streaming



## Traditional Media



## New Media



## Telcos/Cable Operators



Source: Google Play, App Store, AppFigures | Note: The map is not exhaustive and only includes players with downloads over a certain cut-off. Not all platforms necessarily have an official presence in Pakistan, though they continue to get some traction.

# Check out some of our other work



Tech and VC Landscape



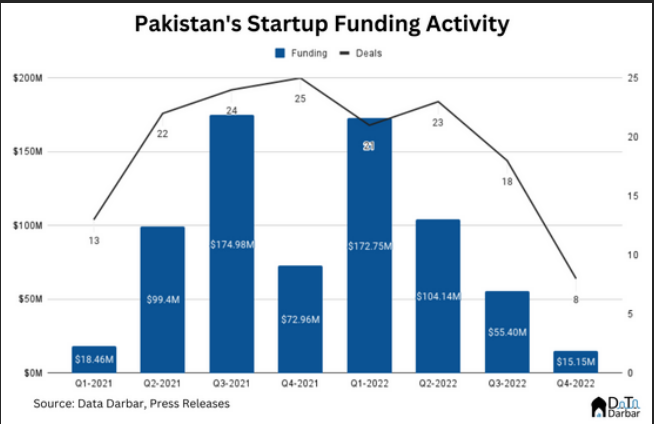
State of Apps | Pakistan 2022



State of B2C E-Commerce 2022



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Newsletter | Due Diligence

# Contact Us

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