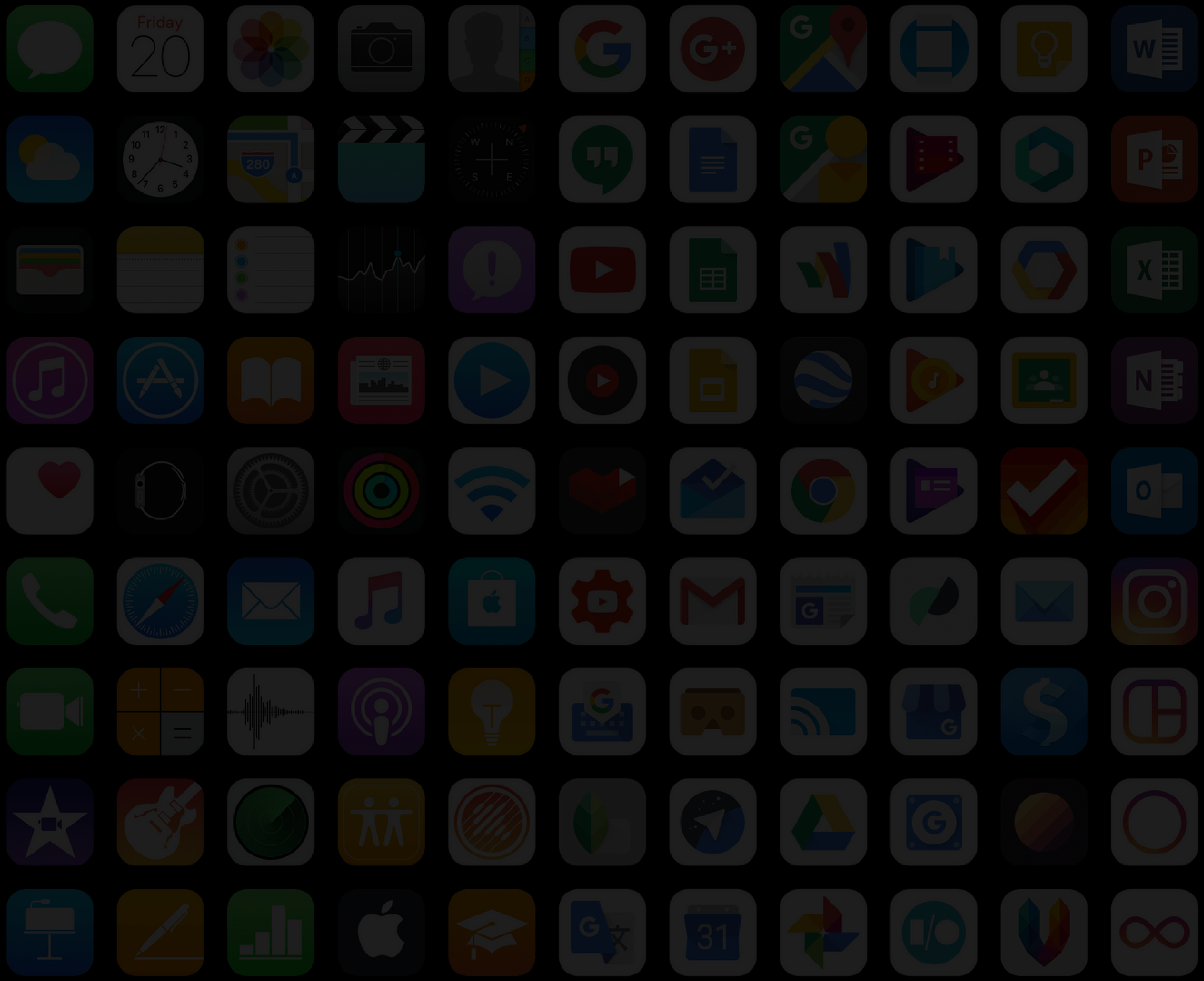
State of Apps Pakistan | 2024



Data Darbar

TABLE OF CONTENTS

2024 Wrapped - Global	01
2024 Wrapped - Pakistan	02
Macro Mobile Trends	04
Zooming in on Pakistan	12
Category Breakdowns	18
Pakistan vs. Peers	30
Leaderboard	35
Portfolio Spotlight	40
About Us	46

2024 Wrapped - Global

Global App Downloads	136B
Mobile Ad Spend	$195M
Average Time Spent per User	3.5 Hours
Total Hours Spent	4.2 T
Mobile Internet Subscribers	5.5B
AI App Downloads	1.49B
(IAP) Revenue	$150B
Penetration Rate	71%
AI IAP Revenue	$1.27B
Apps used Per User	26/month
App Downloads per Minute	258K
Smartphone Connections	80%

Source: State of Mobile 2025 - data.ai , The Mobile Economy 2025 - GSMA
Note: Total hours are for Android only.

2024 Wrapped - Pakistan

App Downloads
3.5B

Average Monthly Mobile Data consumed per user
8.4 GB

Apps released by Pakistani developers in 2024
2.5K

Total Hours Spent
79.1B

Mobile Broadband Subscriptions
134.8B

Global Hours Spent Ranking
12th

Mobile Teledensity
79%

Global Downloads Ranking
9th

Broadband Data Usage
13K PBs

Effective Price (Revenue) per GB per month
PKR 26.6

Mobile Data ARPU (Monthly)
PKR 276

Broadband Penetration
57%

Source: State of Mobile 2025 - data.ai , Pakistan Telecommunication Authority, Appfigures
The data taken from PTA is for FY24, which ends in June
The number of apps released is slightly higher here compared to later sections, as it also includes platforms other than Google Play and the App Store, and has been rounded to the nearest whole number.

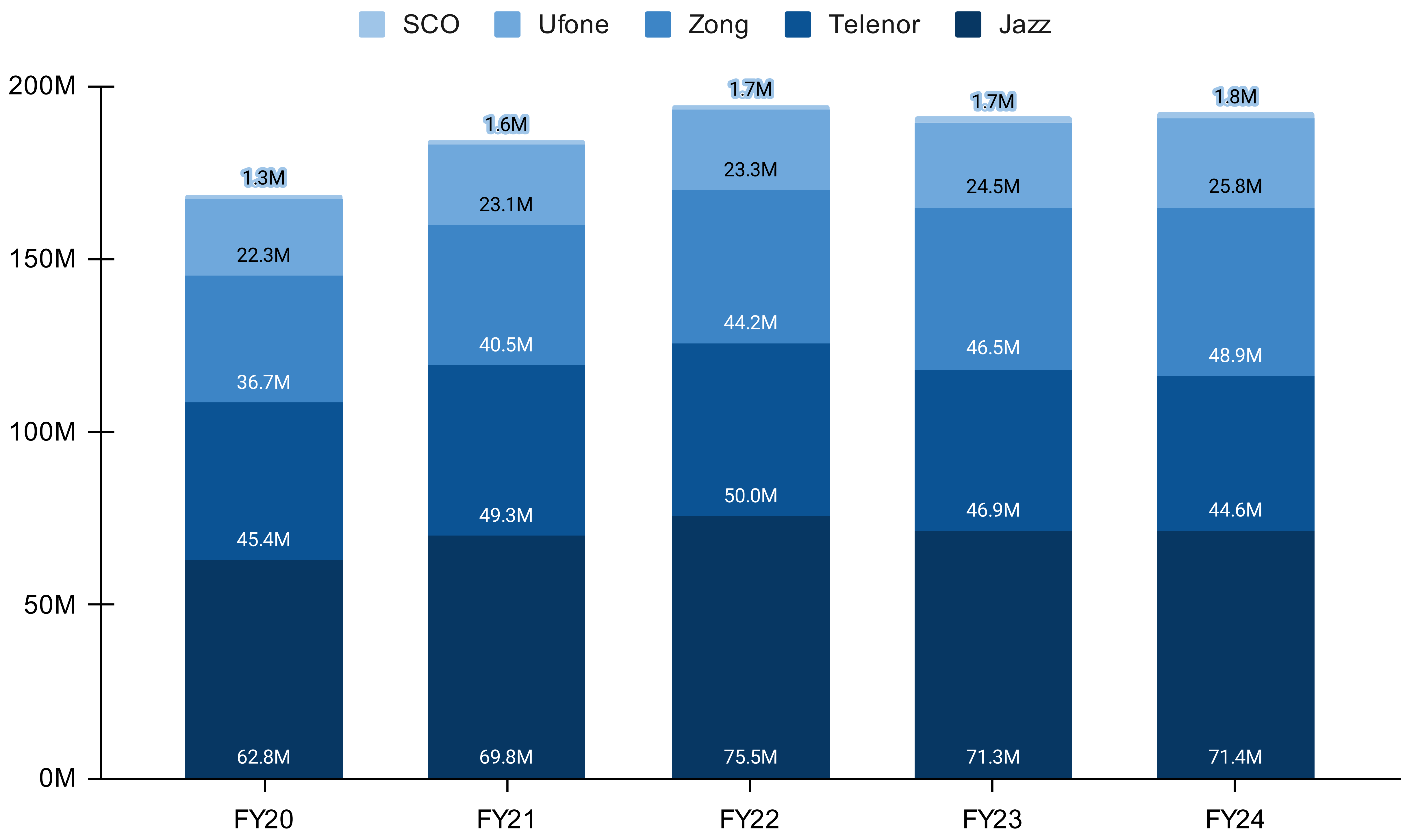
Methodology

This report is based on download estimates sourced from data.ai's State of Mobile reports, Appfigures, and Jazz. A few clarifications on approach and scope are important for interpreting the numbers:

- App categorization: Some apps may appear under different categories compared to last year's report. This is because we follow the primary category listed on the Google Play Store, which may differ from how Appfigures or the app developer previously classified them.
- Restated figures: Download totals for previous years may not exactly match earlier publications. Data.ai occasionally revises historical numbers in its latest reports, and we use the most updated figures to ensure comparability.
- Download measurement: All download estimates are reported on a per-user basis. Only one download per Apple or Google account counts toward the total. Multiple device installs, re-installs, and app updates by the same user are excluded.
- Jazz app discrepancies: For Jazz-owned apps, the numbers in our category breakdowns may differ slightly from those highlighted in the Jazz spotlight sections. This is due to methodological differences; Jazz includes reinstalls in their numbers, whereas AppFigures excludes them.

Macro Mobile Trends

Zong leads market recovery as mobile subscriptions rebound

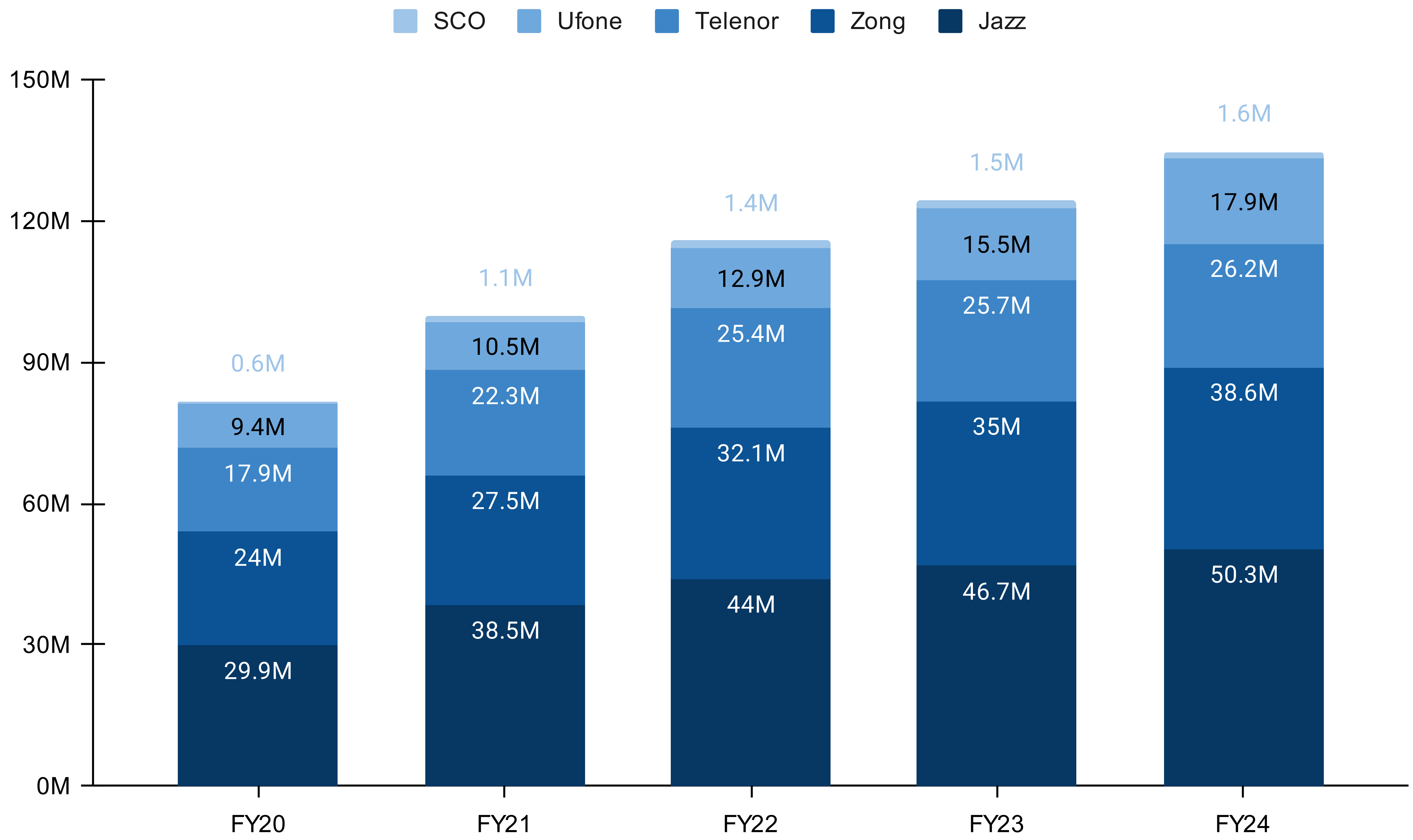


Pakistan's cellular market grew 0.8% in FY24 to 192.5M subscribers after last year's decline. Jazz maintained its lead at 71.4M users, albeit showing only a minor uptick. On the other hand, Zong gained 2.4M new connections, driven by aggressive 4G expansion with over 400 new sites and major network upgrades, narrowing the gap with second-place.

Meanwhile, Telenor shed 2.3M subscribers as weaker network performance and prolonged delays in its pending sale to PTCL eroded customer confidence in an already competitive, price-sensitive market.

Source: Pakistan Telecommunication Authority

Jazz leads as Pakistan's broadband market expands 8.4%

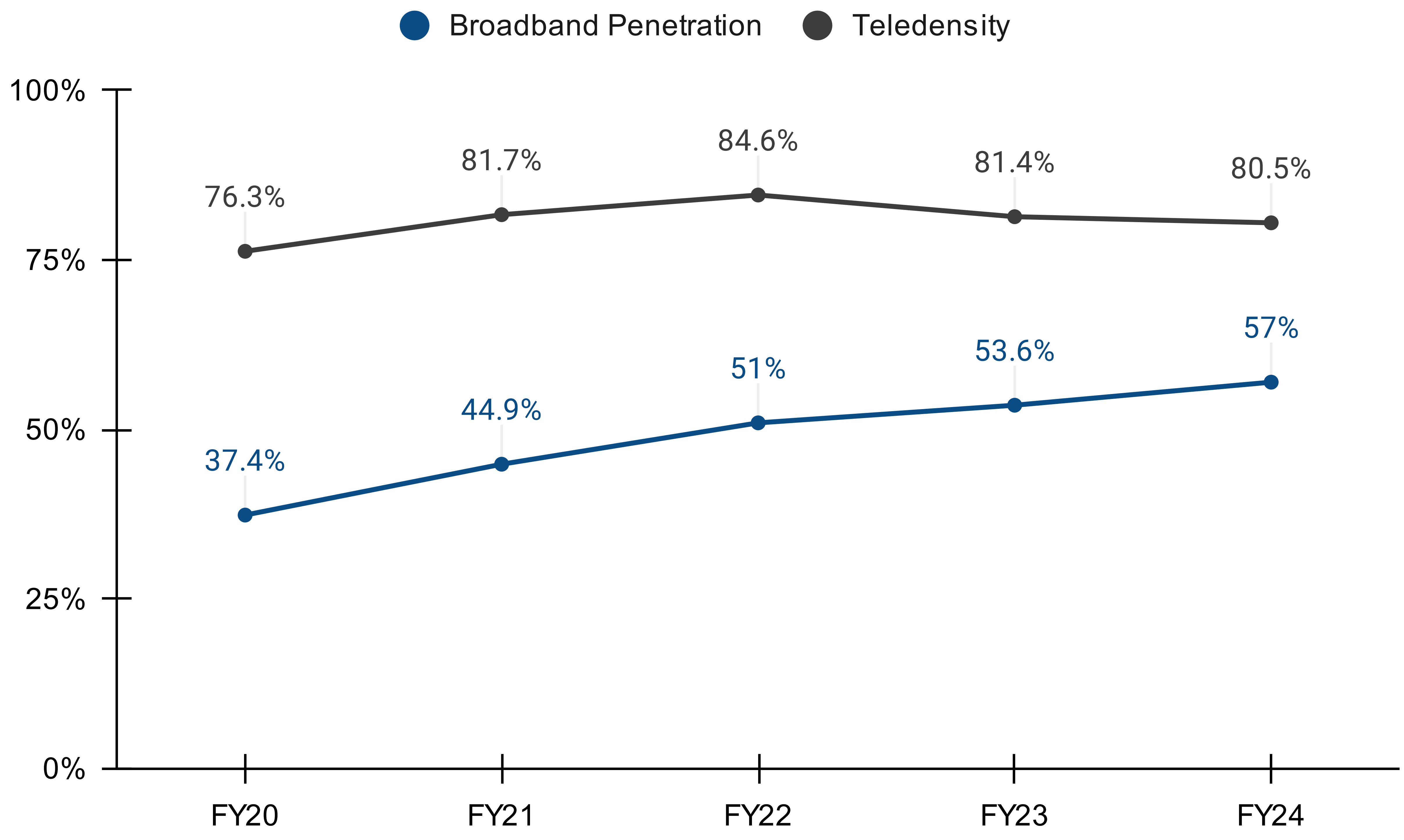


The mobile broadband subscriptions in FY24 surged to 134.8M subscribers, up 8.4% from the previous year, well above the overall mobile market's modest recovery. Jazz maintained its lead, adding 3.6M new connections, with 70% of the users now having a broadband.

Zong matched this growth, adding 3.6M connections to reach 38.6M subscribers. However, thee steepest jump came from Ufone at 15.7% as it brought in 2.4M subscribers, driven by aggressive 4G rollouts, targeted offers in underserved areas, and a push to migrate voice-only customers to higher-ARPU broadband package.

Source: Pakistan Telecommunication Authority

Digital Paradox: More internet, fewer mobile connections

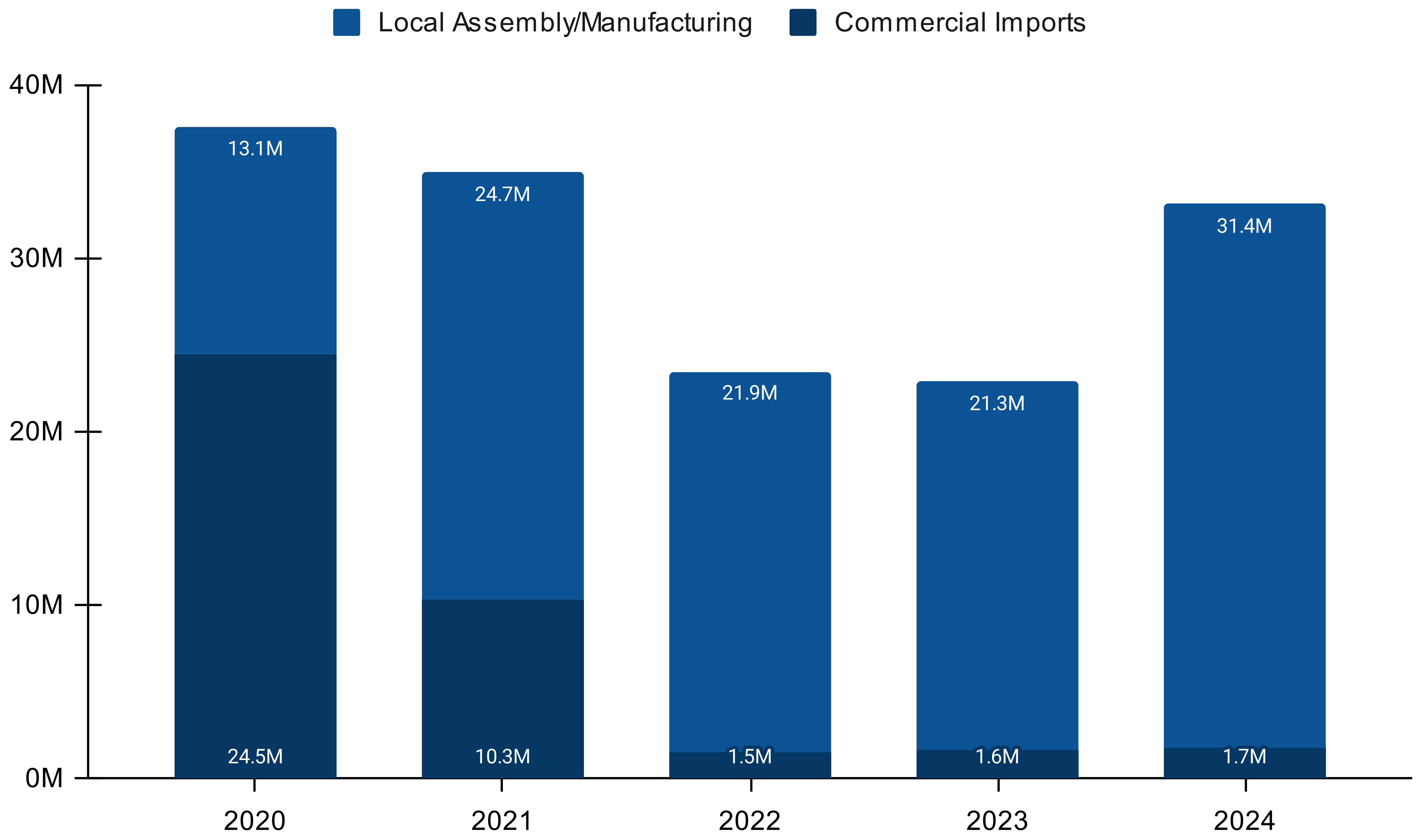


In FY24, teledensity slipped to 80.5% from a FY22 peak of 84.6% as the rate of new mobile connections trailed the overall population growth.

In contrast, broadband penetration climbed to 57%, up 6.3% YoY. This growth was supported by operator-led migration from 2G/3G, even as infrastructure constraints (only about 9% of towers connected to fiber) and a challenging regulatory environment, including high spectrum costs and a 108th global ease-of-doing-business rank, continued to limit broader network expansion.

Source: Pakistan Telecommunication Authority | Note: Both teledensity and broadband penetration include fixed and mobile connections.

Smartphone production surges 47.5% in FY24



After two years of slowdown amid macro uncertainty and restrictions on imports, mobile manufacturing finally bounced back in 2024, with locally assembled units surging 47% YoY to 31.38M while imports stood at 1.71M.

Roughly 95% of the national demand was met through local assembly compared to 67% averaging over the last 5 years, makring a reversal from 2020’s import-heavy market thanks to the Mobile Device Manufacturing Policy, DIRBS, and steep tariffs on fully built units (up to 30%) versus lower duties on parts (10–15%).

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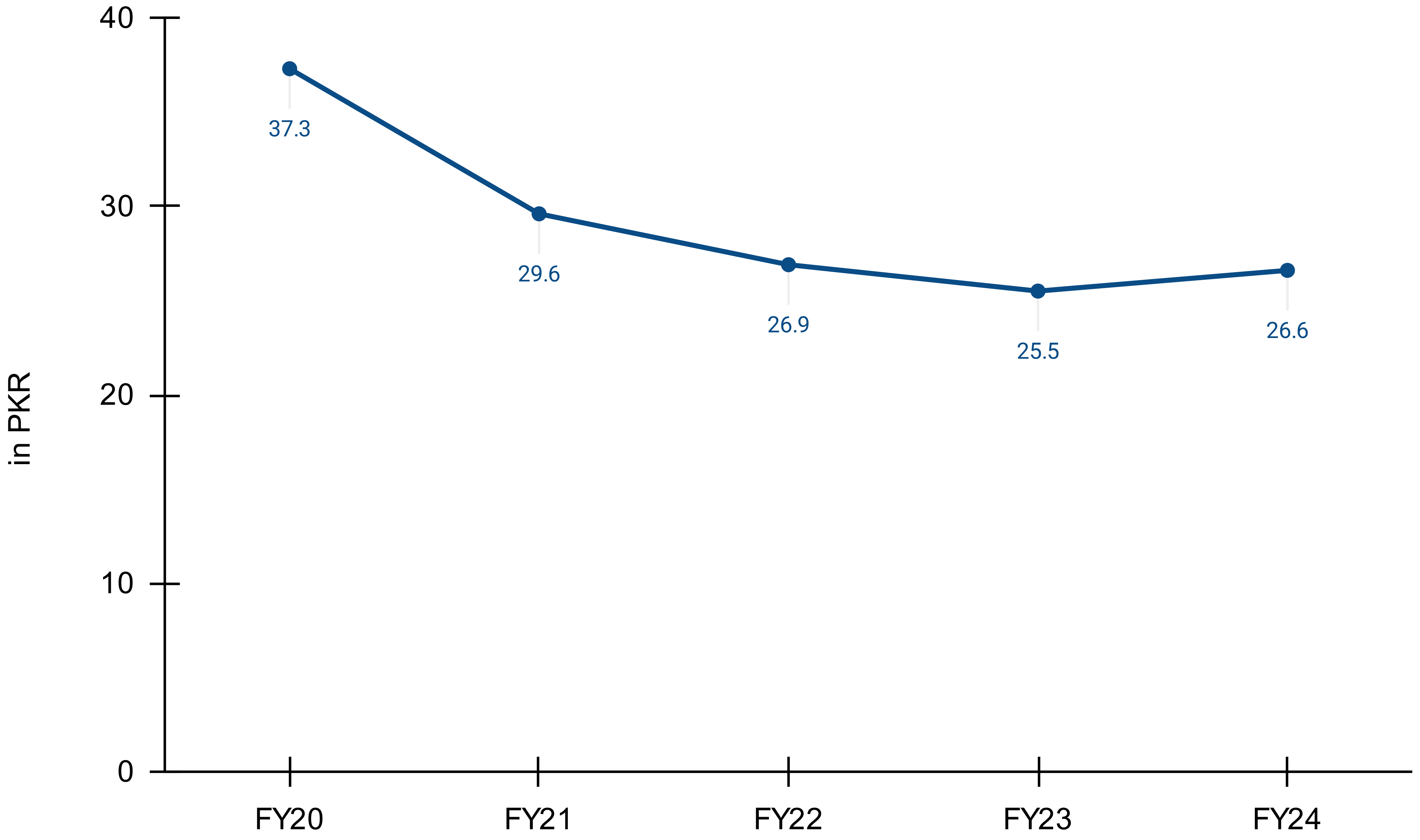
Source: Pakistan Telecommunication Authority

Data prices stabilize after years of decline

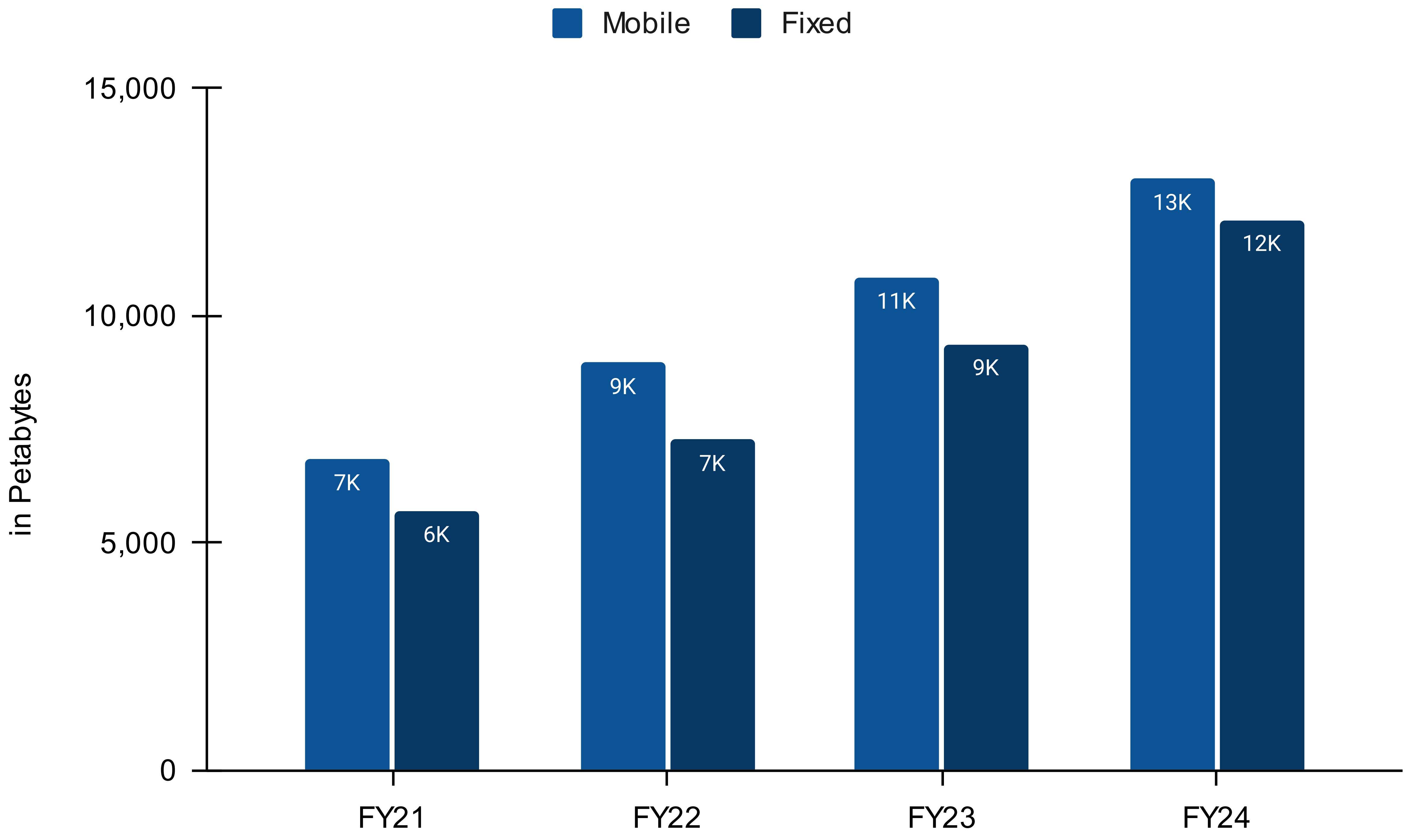


After consecutive years of declining data prices, the telecom operators finally got some respite as the effective cost per GB edged up to PKR 26.6, up 4.3% increase from the previous year. Between FY20 and FY23, prices had fallen by a cumulative 32% as MNOs, locked in fierce competition, aggressively rolled out attractive data packages to capture market share.

As a result, ARPU rose from Rs 229 to Rs 276 per month in FY24, signalling a shift towards improving profitability rather than prioritizing market share via low pricing.

Source: Pakistan Telecommunication Authority

Mobile leads usage despite fixed broadband's faster growth



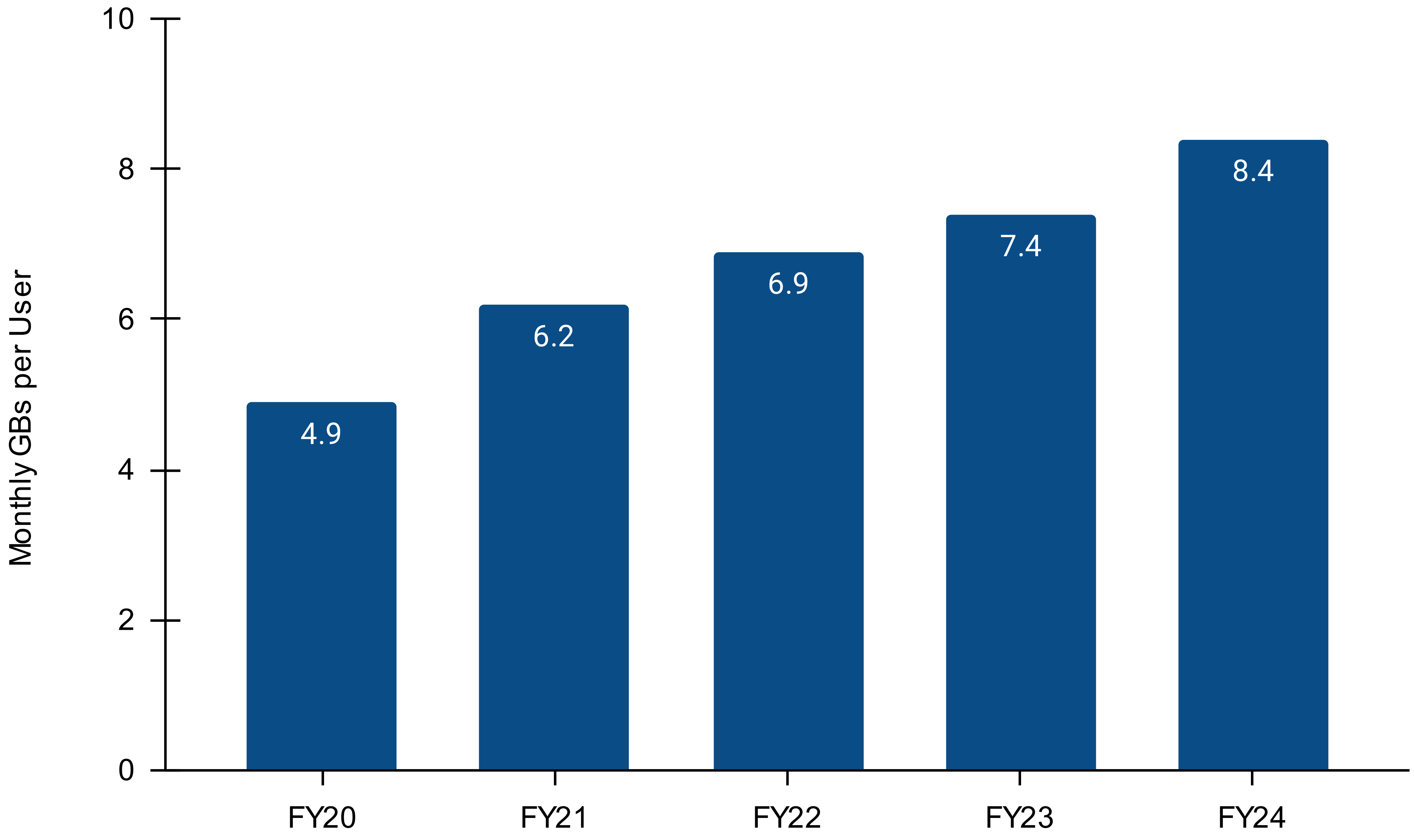
Pakistanis appetite for data continued a remarkable expansion in FY24, with mobile data usage surging 20% to 13,002 petabytes and fixed broadband consumption jumping 29% to 12,120 petabytes.

This sustained growth reflects the country's accelerating digital adoption, underpinned by rising smartphone penetration, wider 4G coverage, and shifting consumer habits toward bandwidth-heavy activities such as video streaming, social media engagement, and remote work.

Data Darbar

Source: Pakistan Telecommunication Authority | Rounded to one decimal place.

Average data usage nearly doubles to 8.4GB since FY20



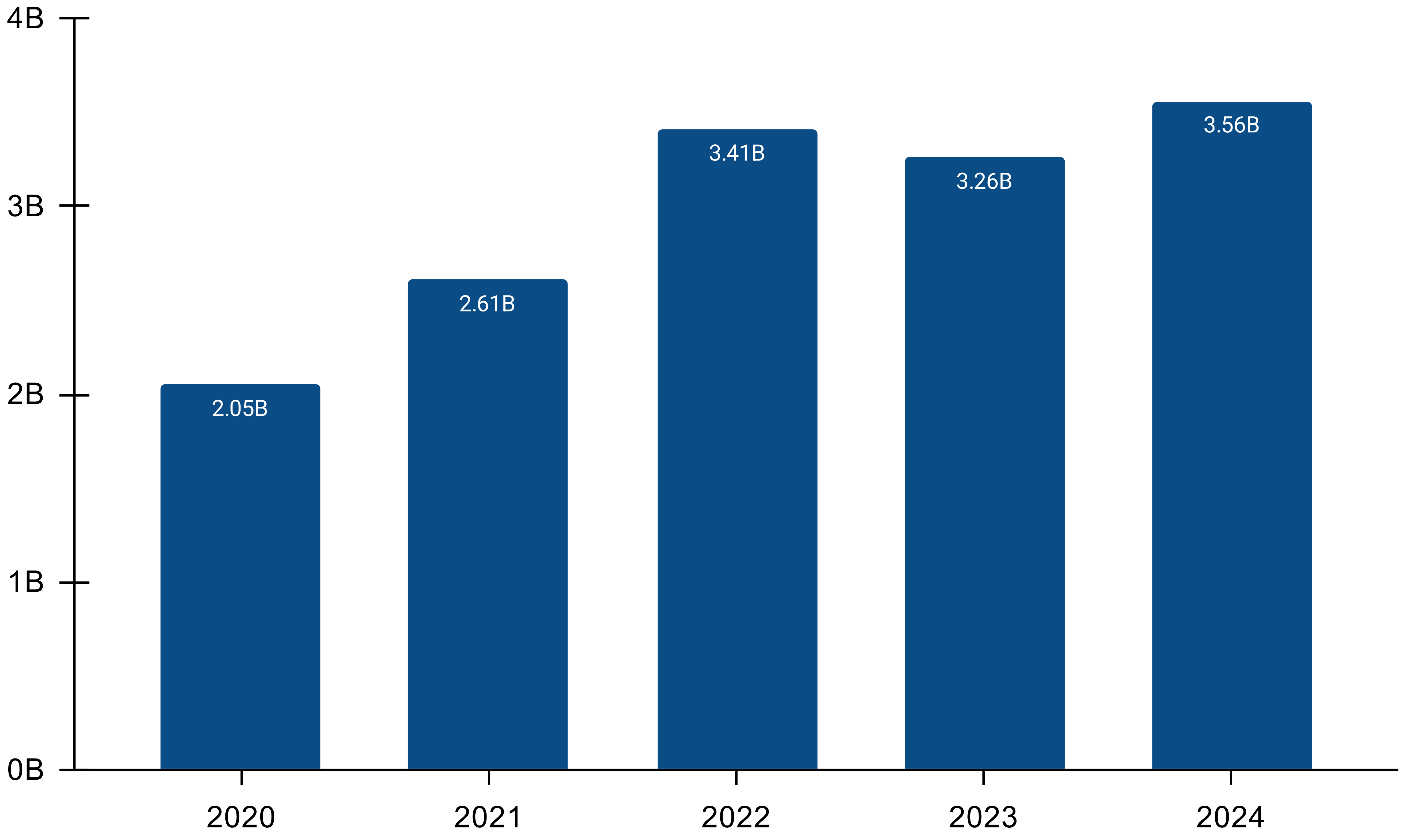
Similarly, average mobile data usage per subscriber climbed to 8.4 GB a month in FY24, representing a 13.5% increase from the previous year's 7.4 GB. This steady upward trajectory has seen per-user consumption grow by 71% since FY20, when average usage stood at just 4.9 GB per month.

The sustained growth despite economic challenges demonstrates that mobile data has become an essential utility with users prioritizing connectivity even during periods of financial constraint

Source: Pakistan Telecommunication Authority

Zooming in on Pakistan

App downloads hit record 3.56B after 2023 decline

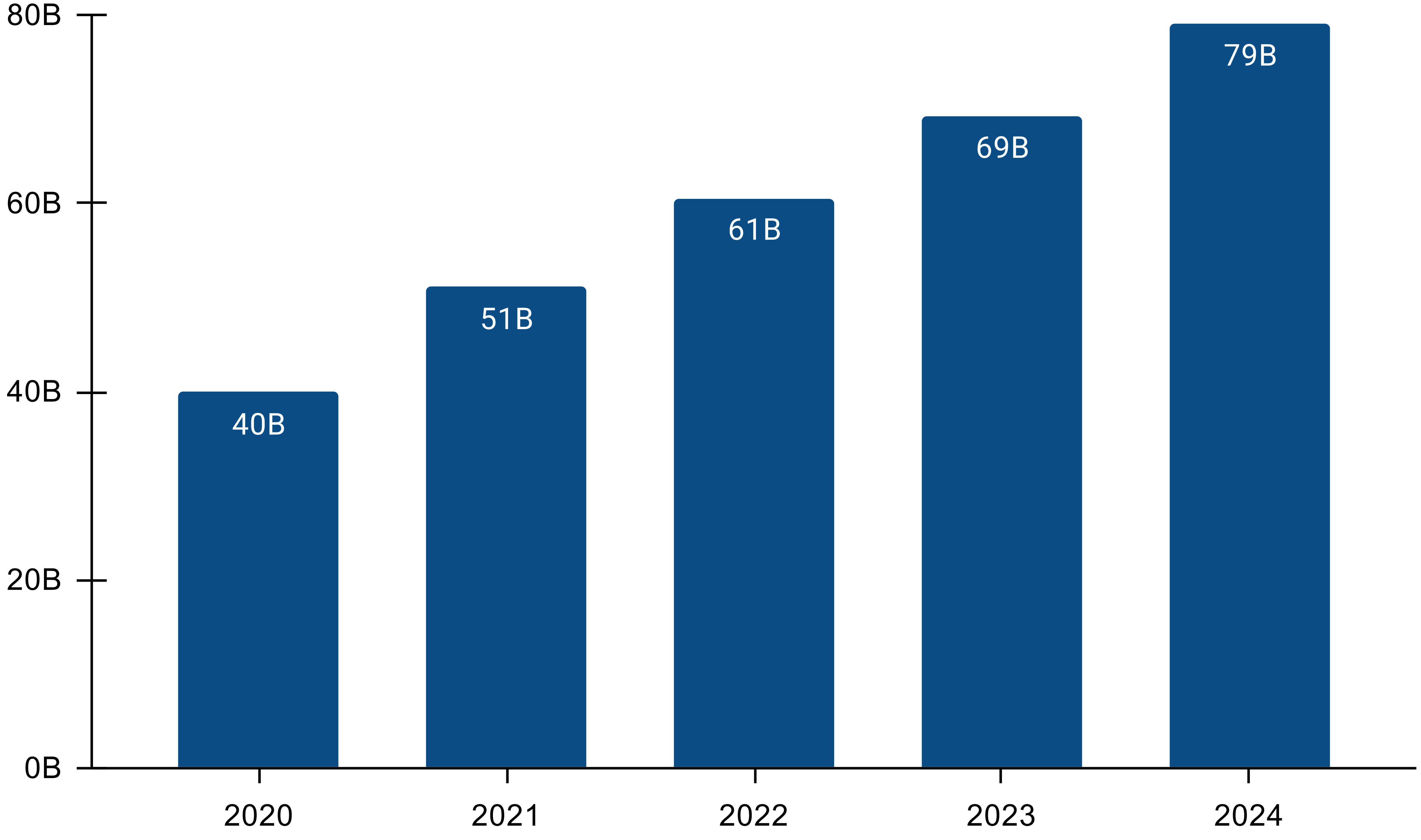


App uptake also witnessed a strong bounce-back in 2024 as new downloads reached 3.56 billion. This marked a noticeable 9.2% increase over 2023, marking a recovery from the previous year when the figure had slipped 4.4%.

However, the recent recovery has been impressive, far outpacing the 2.3% uptick in global installs, albeit partly because of lower base. As a result, Pakistan maintained its position, ranking ninth out of all countries, unchanged since the last many years.

Source: State of Mobile 2025 - data.ai

Digital engagement with apps climbs 98% in 2024

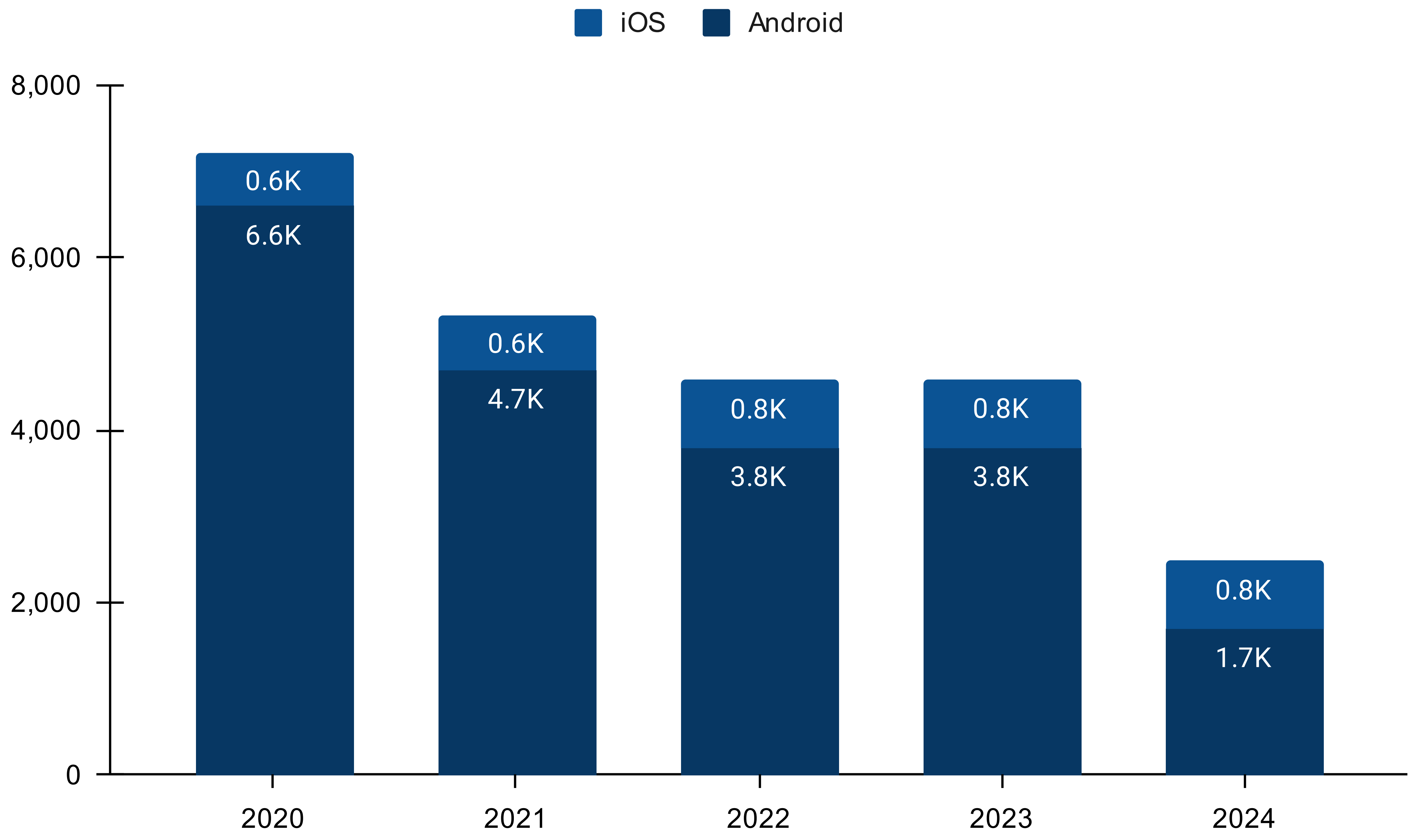


Pakistani users spent a staggering 79.1 billion hours on mobile apps in 2024, marking a 14.1% increase from 69.3B hours in 2023 and on par with the previous year. Since 2020, when users logged 39.9 billion hours, the screen time almost doubled.

Compared to the average increase of 5.5% globally, Pakistan's growth appears to be even more impressive, underscoring the rapid digitization at the consumer level, driven by rising access to smartphones and mobile broadband connections.

Source: State of Mobile 2025 - data.ai | Includes only Android
Note: Data.ai recently amended its formula, which significantly reduced the number of hours so we estimated the values for 2020 and 2021 based on the changes. Comparison with 2024 global figures is based on the older version to ensure consistency.

Local Android app development plummets 55% to 1.7K in 2024

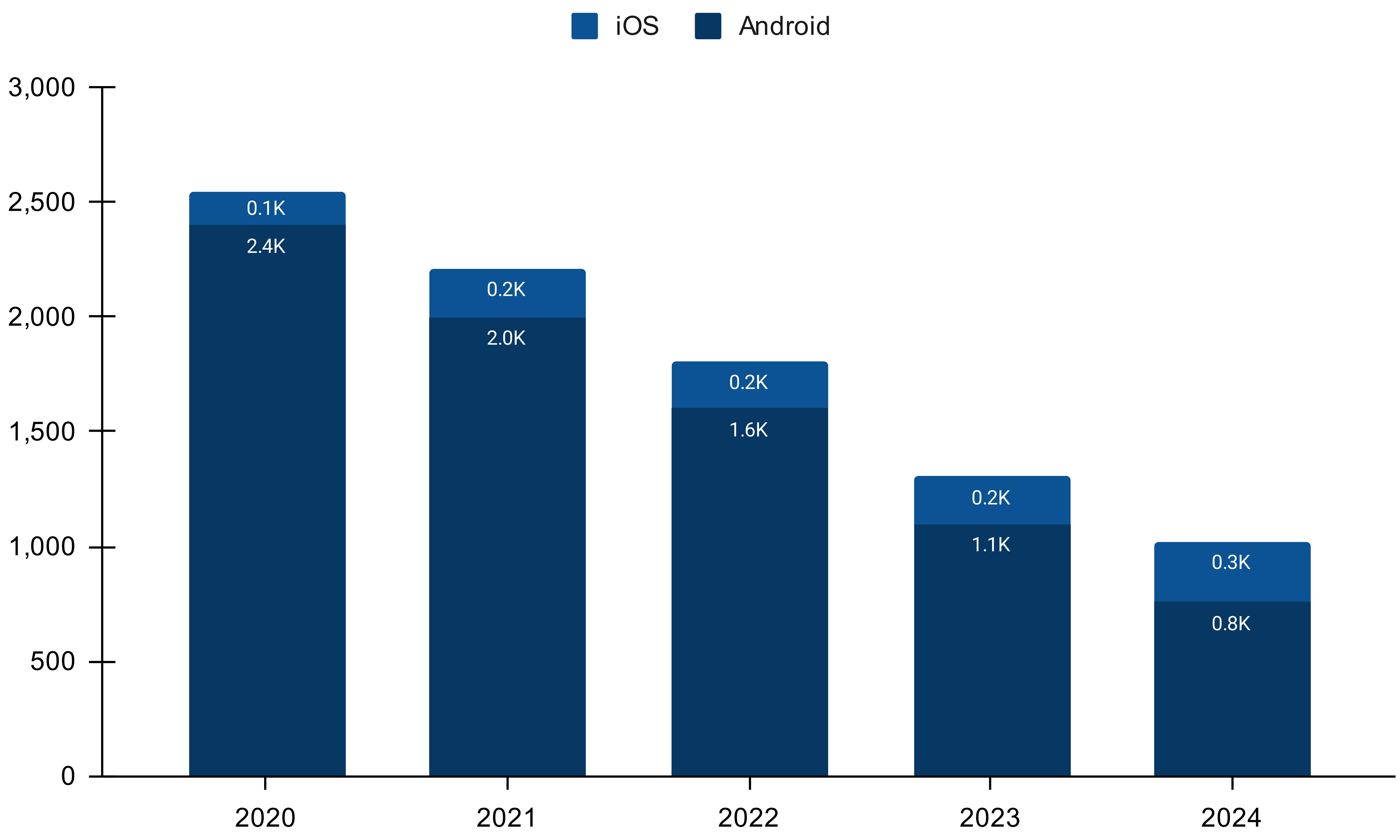


Pakistan's local app development landscape shows a troubling divergence in 2024, with Android-focused development plummeting 55% to just 1.7K apps while iOS development remained stable at 784 apps.

The Android collapse reflects challenging market dynamics for local developers, who face intensifying competition from international apps, rising development costs, and monetization difficulties on the platform. Meanwhile, iOS development has demonstrated remarkable stability, maintaining consistent output around 780-790 apps annually since 2022, suggesting local developers find the platform more commercially viable despite Pakistan's Android-dominated user base.

Source: Appfigures Note: These are cumulative numbers, both active and inactive, across apps. There might be some duplication due to the same product having multiple versions. Rounded to one decimal place.

Local game studios face 69% Android decline since 2020

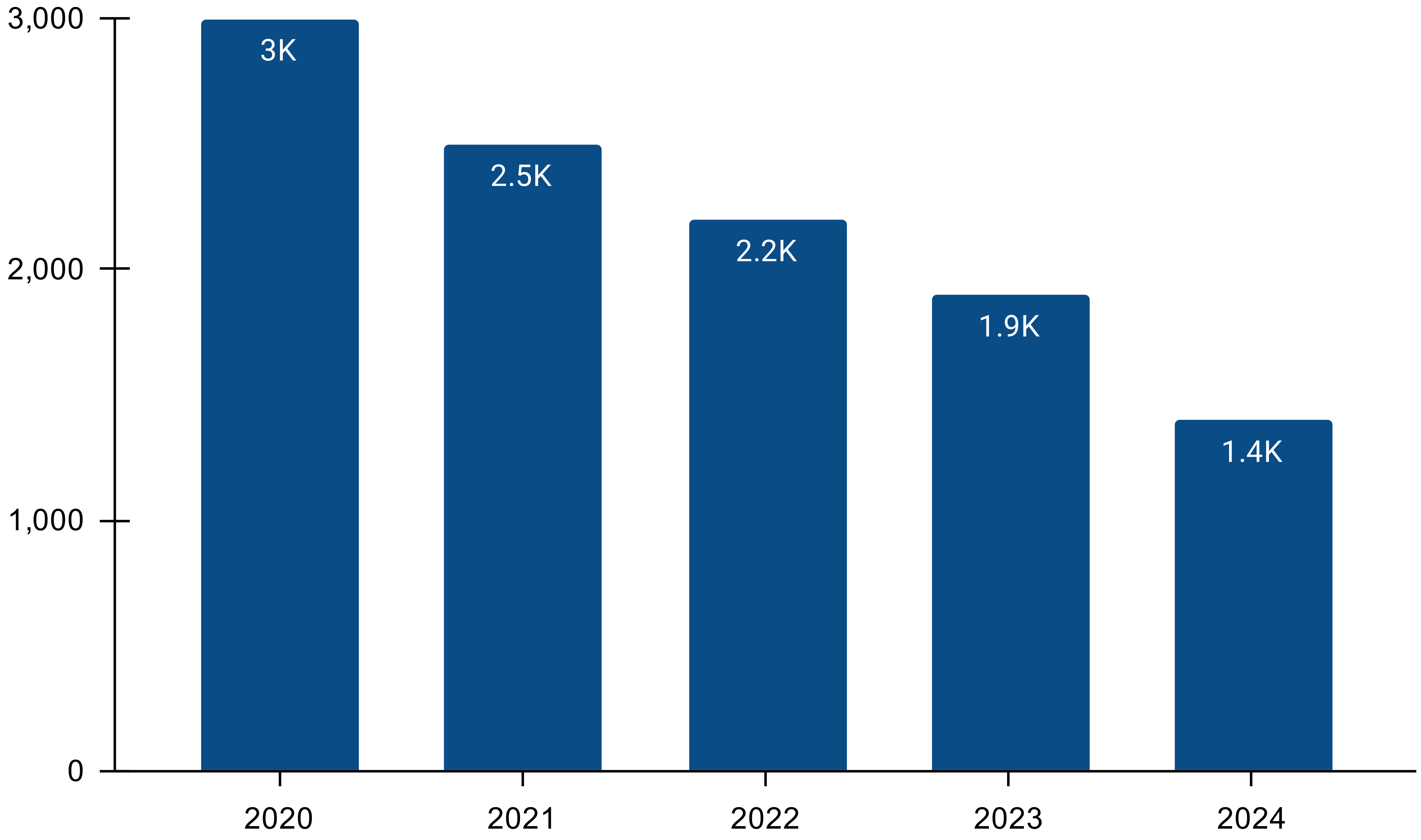


Pakistan's local game development sector experienced a dramatic contraction in 2024, with Android game production collapsing 31% to just 756 titles, down from 2.4K in 2020. This represents a staggering 69% decline over five years, marking the steepest drop across all local app categories

Local developers appear to be either abandoning game development entirely or pivoting to iOS, where premium pricing models and higher user spending provide more sustainable revenue opportunities despite the smaller addressable market

Source: Appfigures | There might be some duplication due to the same product having multiple versions. Rounded to one decimal place.

App development community shrinks to 1.4K developers



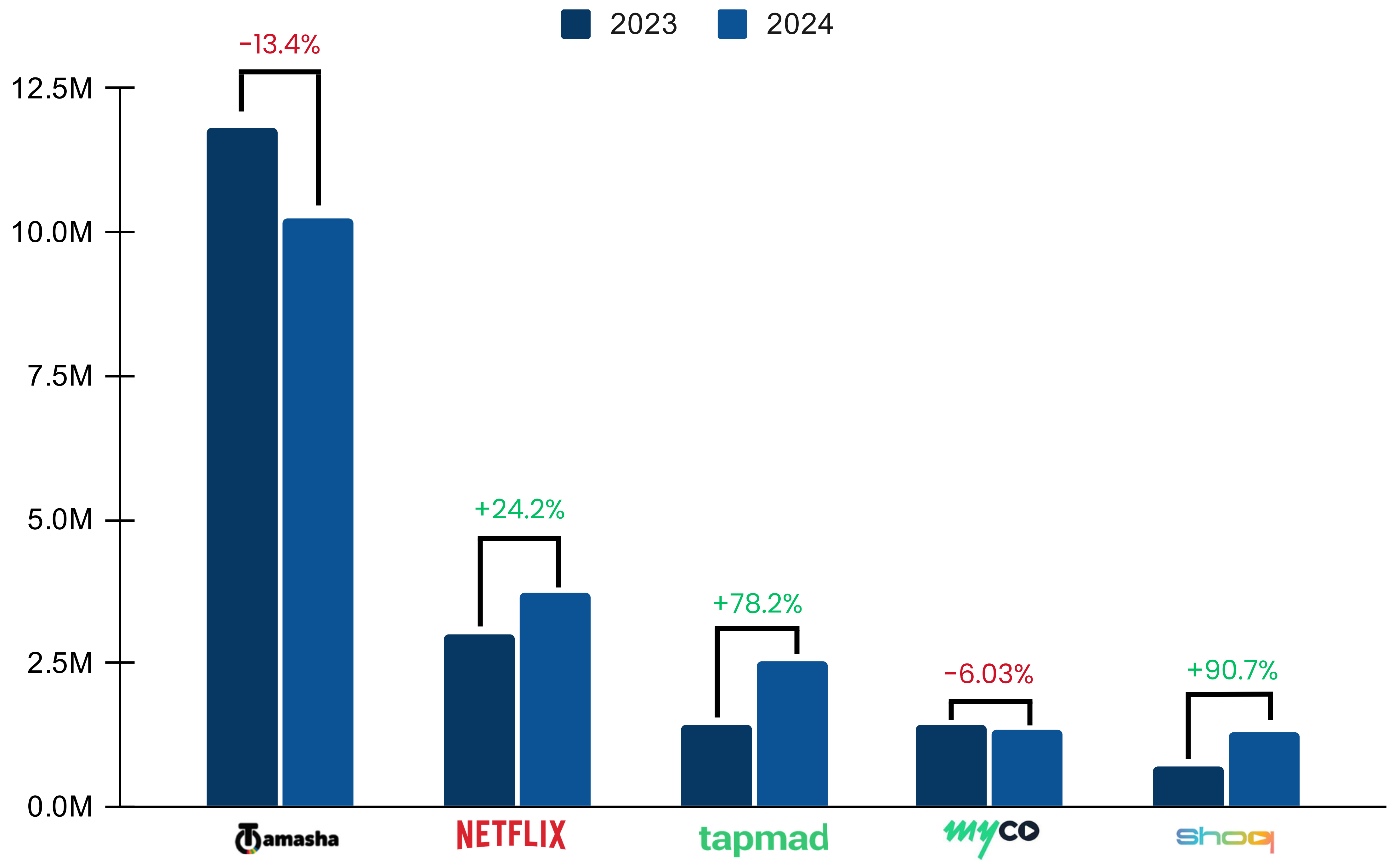
Similarly, the size of the app development community further trended downward to yet another lowest level on record, with active developers plummeting 26% to just 1,400 by 2024, the steepest annual decline in five years.

Expectedly, it is largely due to the tightening of registration and approval criteria by play stores, i.e. Google and Apple. Moreover, due to payment and taxation issues, an ever larger number of developers are actively registering their accounts abroad, thus slipping outside Pakistani domicile for third-party analytics platforms.

Source: Appfigures | Rounded to one decimal place.

Category Breakdowns

Most-downloaded Streaming Apps

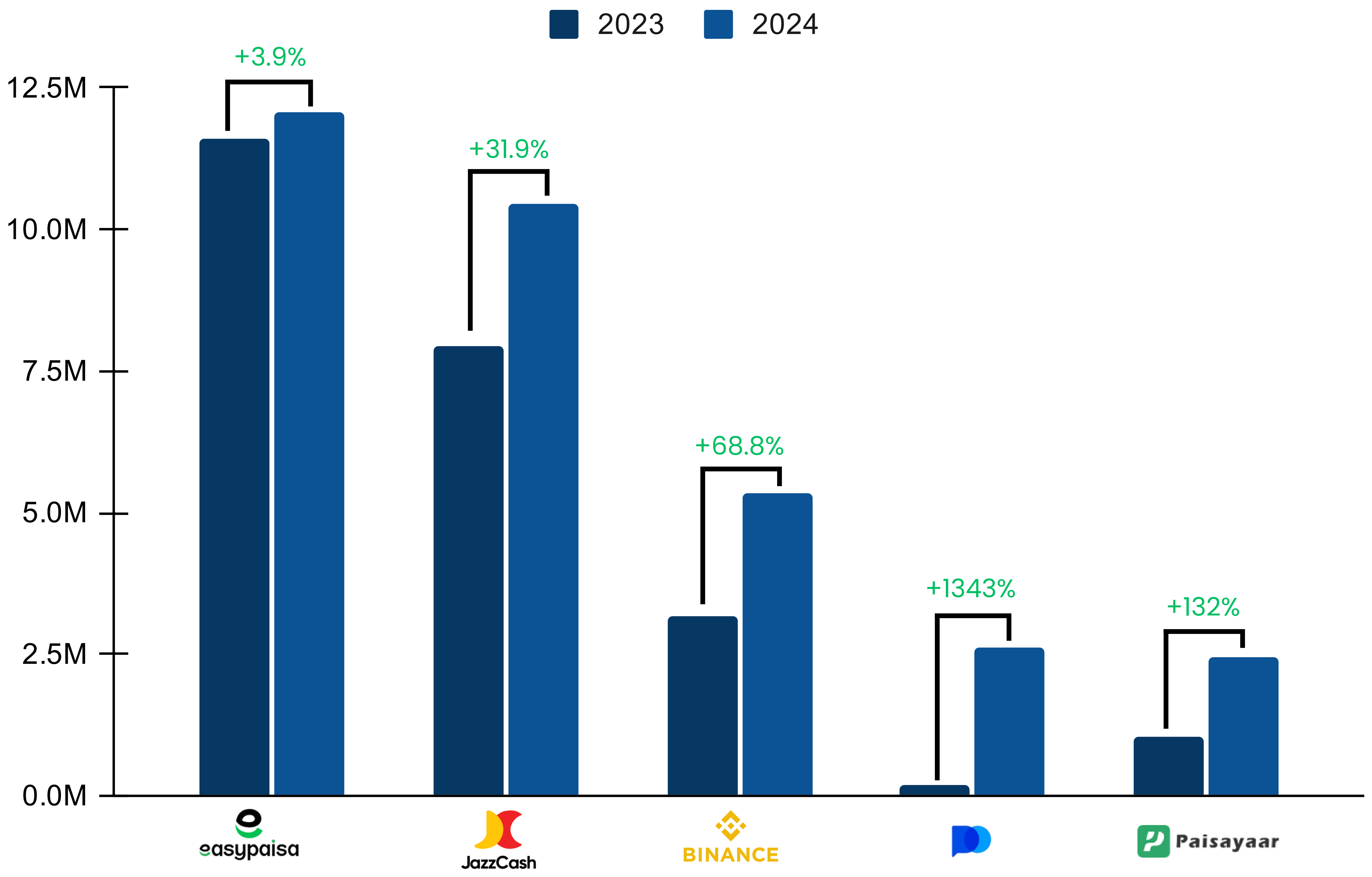


The streaming landscape witnessed dramatic shifts in 2024, with market leader Tamasha shedding 1.6M users (-13.4%) though comfortably retaining its top position at 10.2M downloads by a margin.

Meanwhile, smaller platforms, thanks to low-base effect, exploded: SHOQ nearly doubled its user base (+91%) to 1.3M, driven by aggressive bundling with PTCL and Ufone services, the addition of more premium international content, and targeted campaigns that capitalized on its smaller starting base. Tapmad surged 78% to 2.5M, surpassing myco to claim the third position.

App Names: 1. Tamasha 2. Netflix 3. Prime tapmad 4. myco 5. SHOQ
Source: Appfigures | Note: includes iOS, Android, and lite versions, where available
For most categories, we have used Google Play Store's taxonomy of app categories but since it doesn't have a separate category for streaming, we have classified streaming/OTT platforms as per our own definitions.

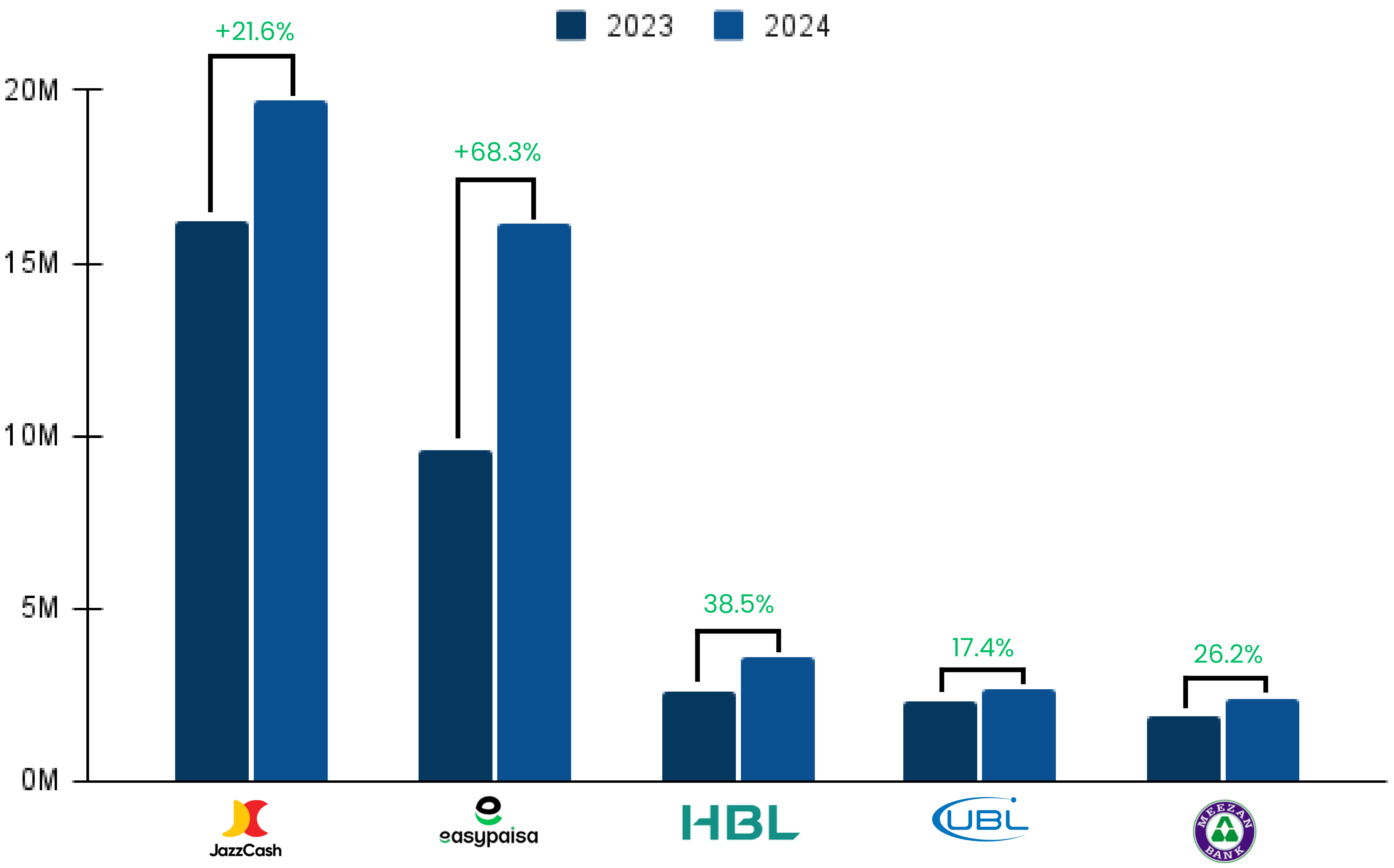
Most-downloaded Finance Apps



Predictably, payments was the biggest driver of downloads where JazzCash closed the gap with market leader on the back of 32% jump in downloads, making way into 10.4M new devices. Meanwhile, Easypaisa despite a 4% uptick to 12.1M, retained its top spot.

Demand for crypto was also notable, with Binance surging 69% to 5.4M installs, followed by another foreign investment platform, Pocket Broker, soaring 1,343% to 2.6M. On other hand, nano lending apps have lost past fervour after crackdown from authorities though licensed Paisayaar managed to make it to the top five in the category.

Monthly Active Users - Mobile Banking Apps

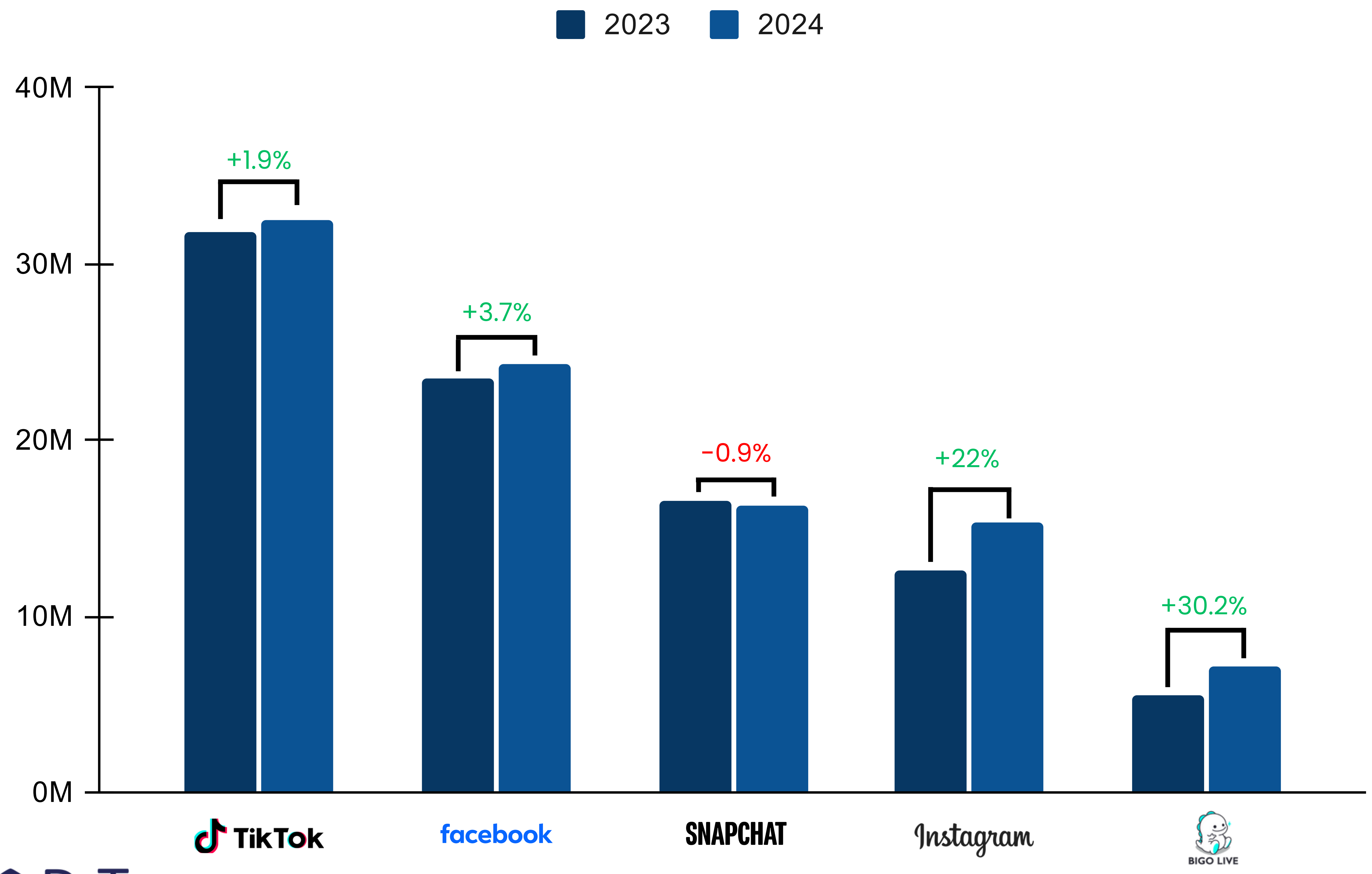


Downloads are a weak proxy for app success. Someone can install an app multiple times without ever using it. This gap is especially stark in finance, where downloads sit far from actual account registrations.

App logins tell a clearer story: JazzCash leads in overall volumes across both years, while Easypaisa shows stronger growth. Mobile wallets dominate here because, unlike conventional banks that rely mainly on internet banking, JazzCash and Easypaisa draw activity from a wider mix; wallets, USSD, and internet banking, keeping them at the forefront of digital finance.

App Names: 1. JazzCash 2. Easypaisa 3. HBL 4. UBL 5. Meezan
Source: Appfigures | Note: includes iOS, Android and lite versions, where available | The numbers are as of December end, except for UBL where they are as of September end.

Most-downloaded Social Media Apps



App Names: 1. TikTok 2. Facebook 3. Snapchat 4. Instagram 5. Bigo Live
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Pakistan's social media landscape remained dominated by established platforms in 2024, with TikTok maintaining its commanding lead at 32.4M downloads despite modest growth. In terms of growth, Instagram emerged as the clear winner, surging 22% to 15.3M downloads.

A notable development was the rise of BigoLive, jumping by an impressive 30%, capitalizing on the country's growing appetite for real-time content creation. In fact, the app's popularity in Pakistan was significant, accounting for 10.4% of its global downloads .

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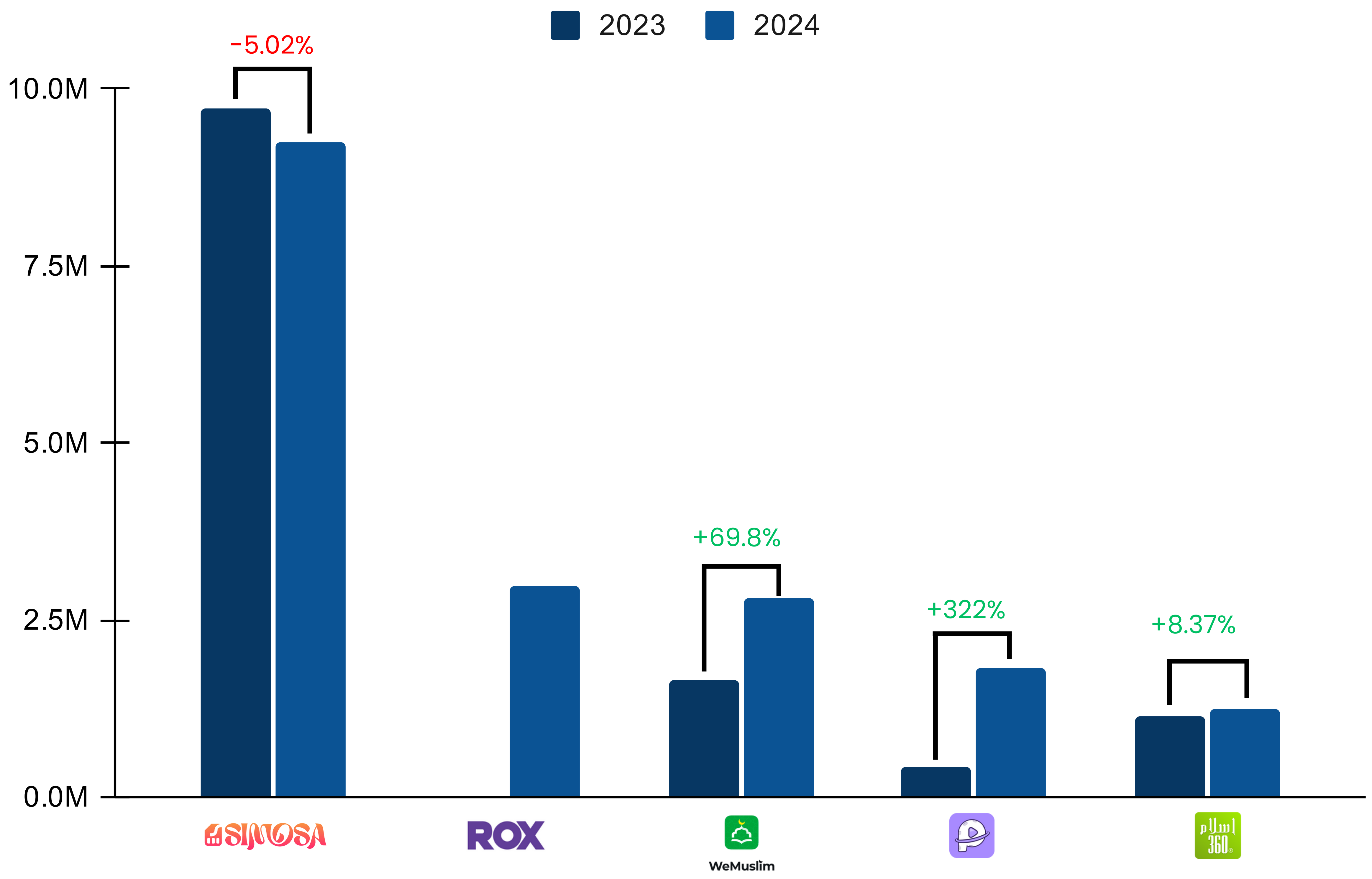
Most-downloaded Lifestyle Apps

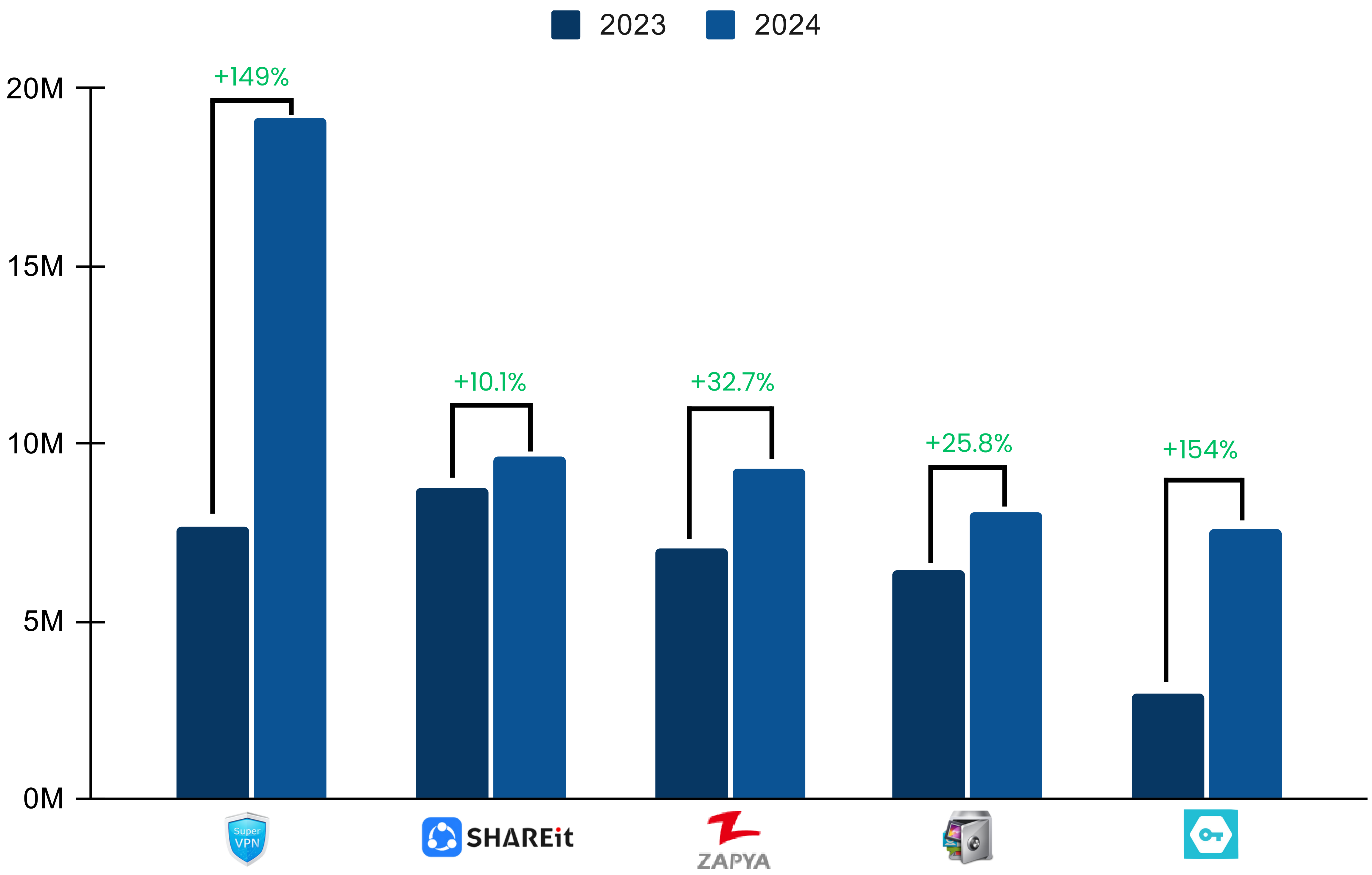


Jazz established dominance in the lifestyle catrgory through its dual-platform strategy. Market leader Simosa (formerly JazzWorld) maintained 9.2M downloads while the newer, more premium ROX made a strong debut with nearly 3M installs, giving the telco the top two slots in the category.

WeMuslim delivered an impressive 70% growth to reach 2.8M downloads, claiming the third position while Pluto surged 320% to 1.8M installs, demonstrating the appetite for social discovery apps. Islam360 showed steady 8% growth to 1.2M downloads, reinforcing the popularity of religious applications in Pakistan.

App Names: 1. Simosa 2. ROX 3. WeMuslim 4. Pluto 5. Islam360
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most-downloaded Tools Apps

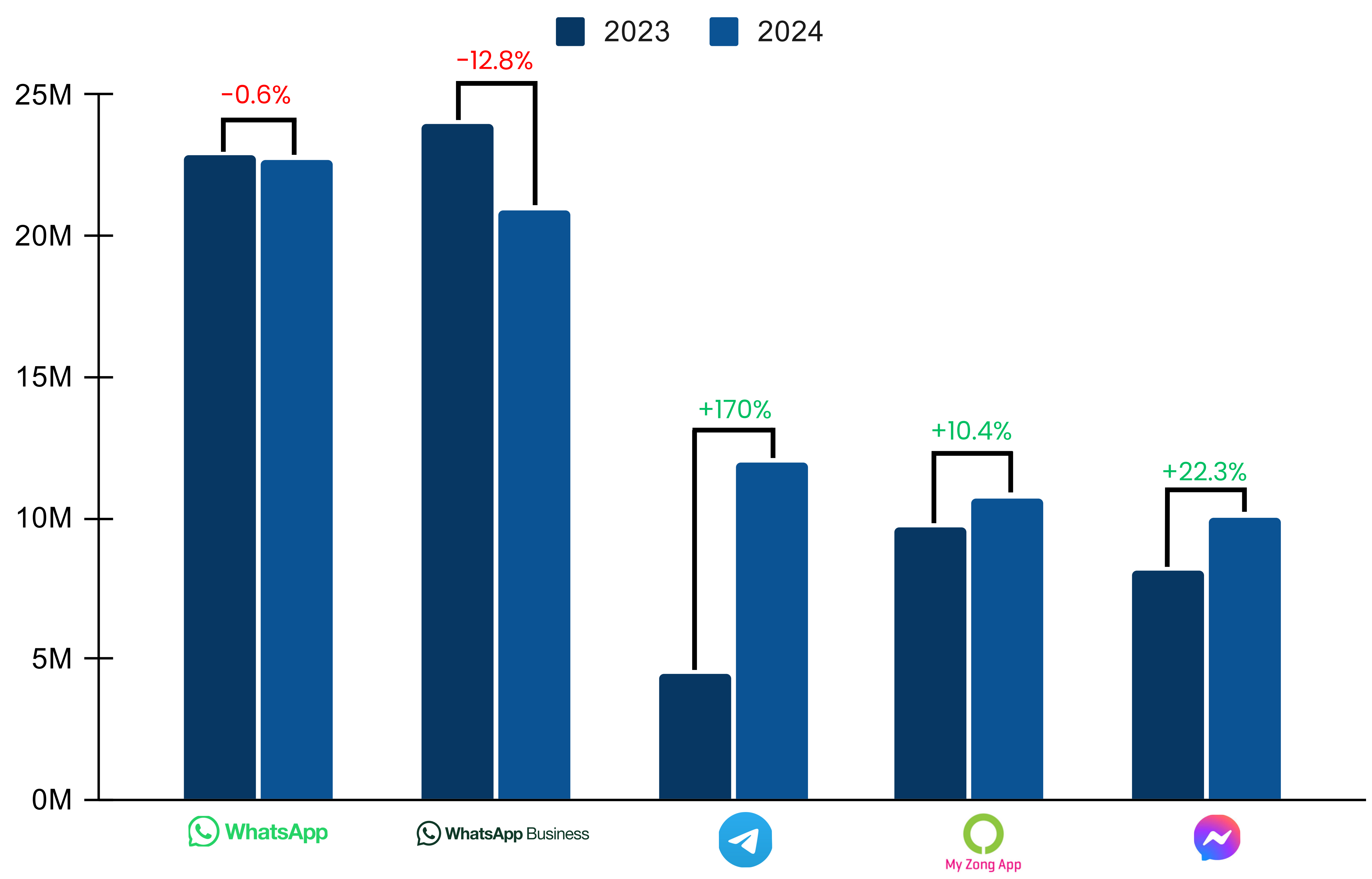


The utility apps category experienced strong growth, with VPN services predictably leading the charge. In top place was Super VPN whose downloads jumped 149% to 19.1M, while Secure VPN followed behind at 7.6M, 158%.

Understandably, the boom was driven by heightened privacy concerns and the need to bypass content restrictions, particularly following the government's February 2024 ban on X, as well as users using these apps to enable access to geo-restricted streaming platforms, gaming apps, international news, crypto exchanges, and other websites blocked by the government.

App Names: 1. SuperVPN 2. SHAREit 3. Zapya 4. App Lock 5. Secure VPN
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most-downloaded Communication Apps

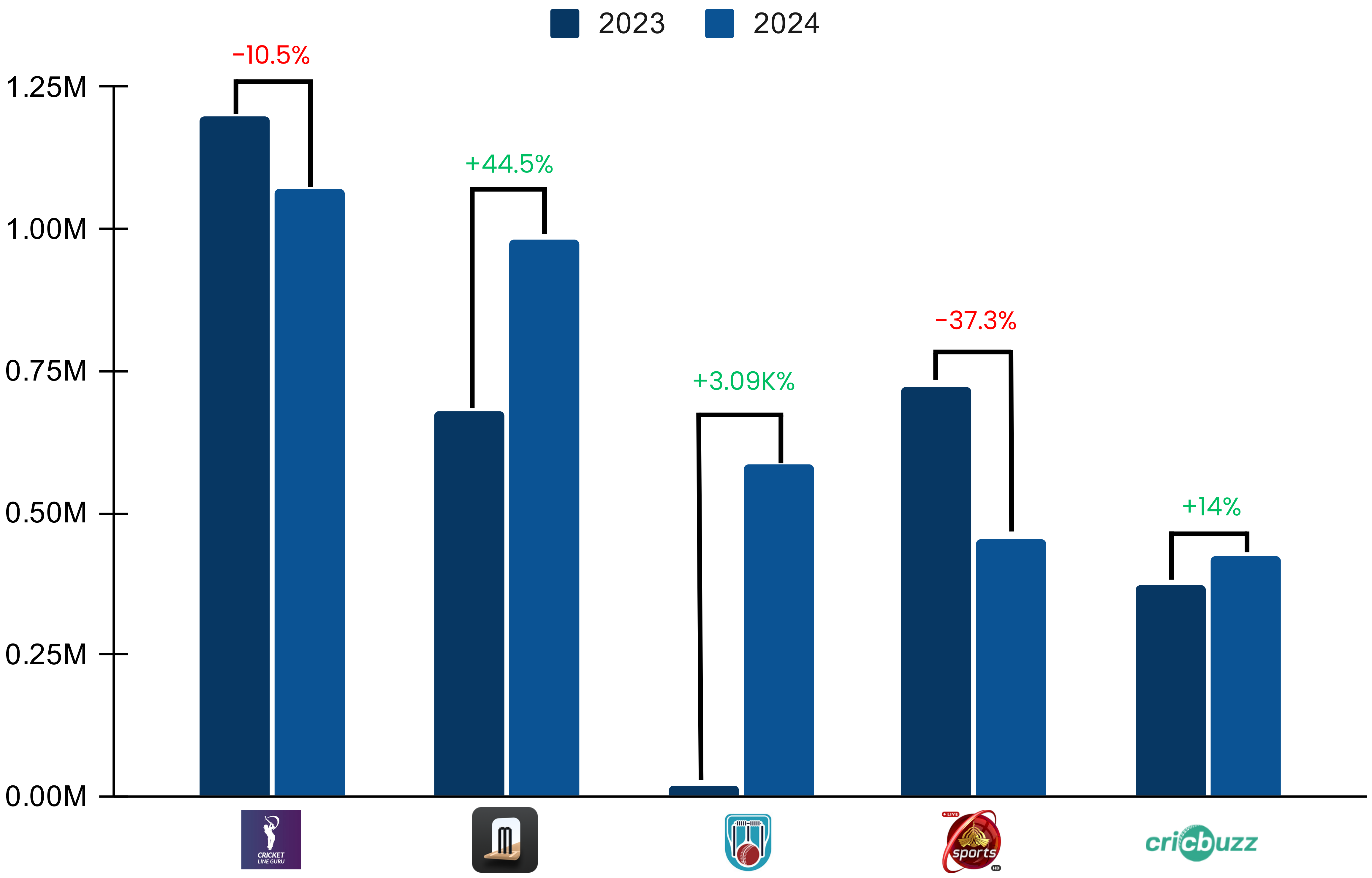


Telegram emerged as the communications sector's biggest winner in 2024, nearly tripling its user base from 4.4M to 12M downloads, a staggering 170% increase. This surge likely reflects growing demand for enhanced privacy features and superior group communication capabilities.

Meanwhile, established leaders faced headwinds: WhatsApp slipped slightly to 22.7M downloads while WhatsApp Business declined 13% to 20.9M, suggesting saturation. Meta's Messenger grew steadily by 22% to reach nearly 10M, while telecom-specific My Zong maintained a modest 10% growth to 10.7M.

App Names: 1. WhatsApp 2. Whatsapp Business 3. Telegram 4. My Zong App 5. Messenger
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most-downloaded Sports Apps

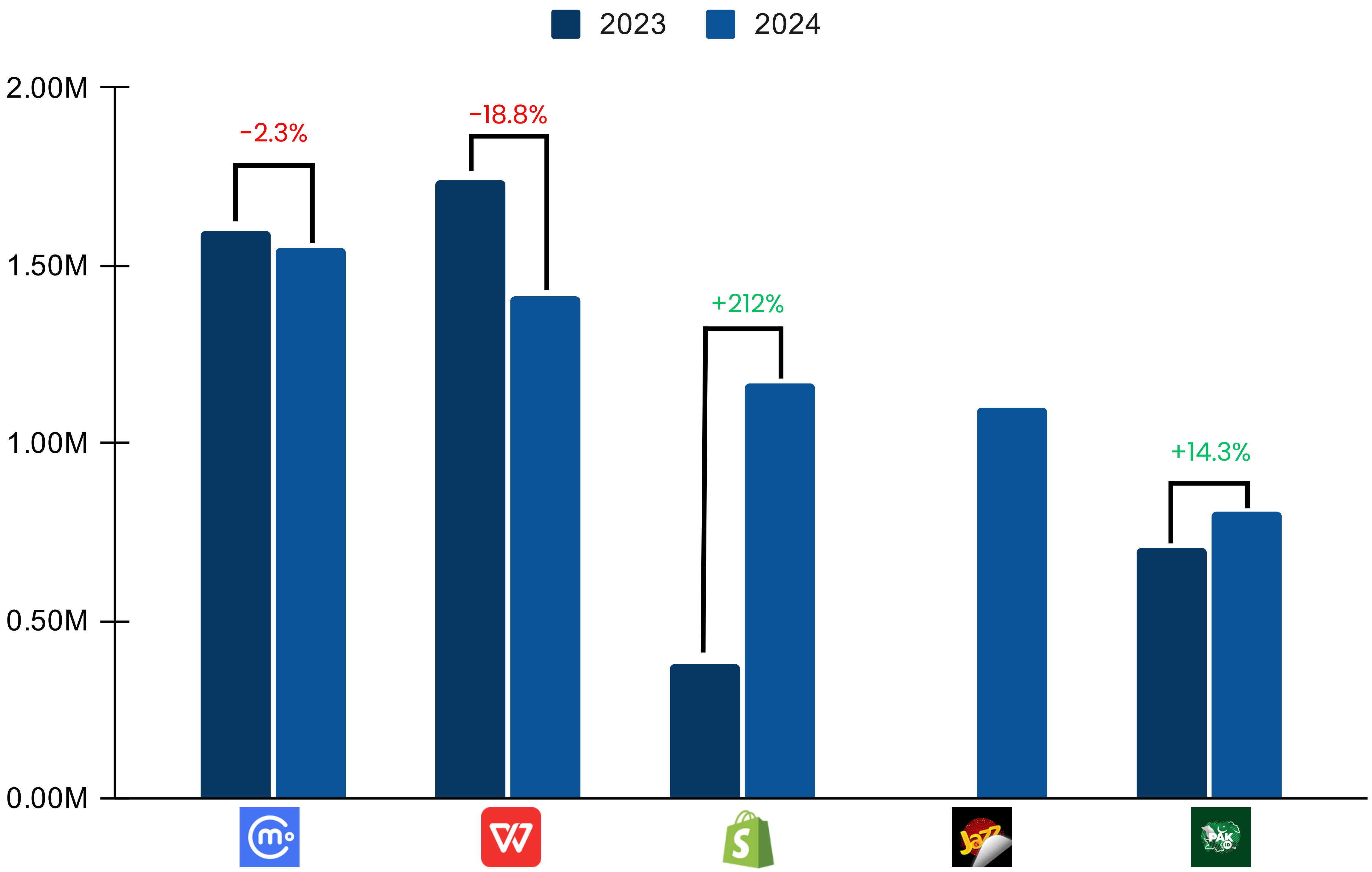


Dedicated sports-only apps faced a mixed 2024, with CREX growing 44% to 980K downloads and newcomer Cricket LineX debuting at 587K while Cricket Line Guru declined 11% to 1.07M. The uneven performance reflects strong interest in cricket apps but also intensifying competition from streaming platforms, which increasingly serve as primary destinations for live sports while offering movies and TV shows.

Exclusive broadcasting rights for major events have accelerated user migration to these multifunctional platforms, challenging traditional sports-only applications.

App Names: 1. Cricket Line Guru 2. CREX 3. Cricket LineX. 4. PTV Sports 5. CricBuzz
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most-downloaded Business Apps

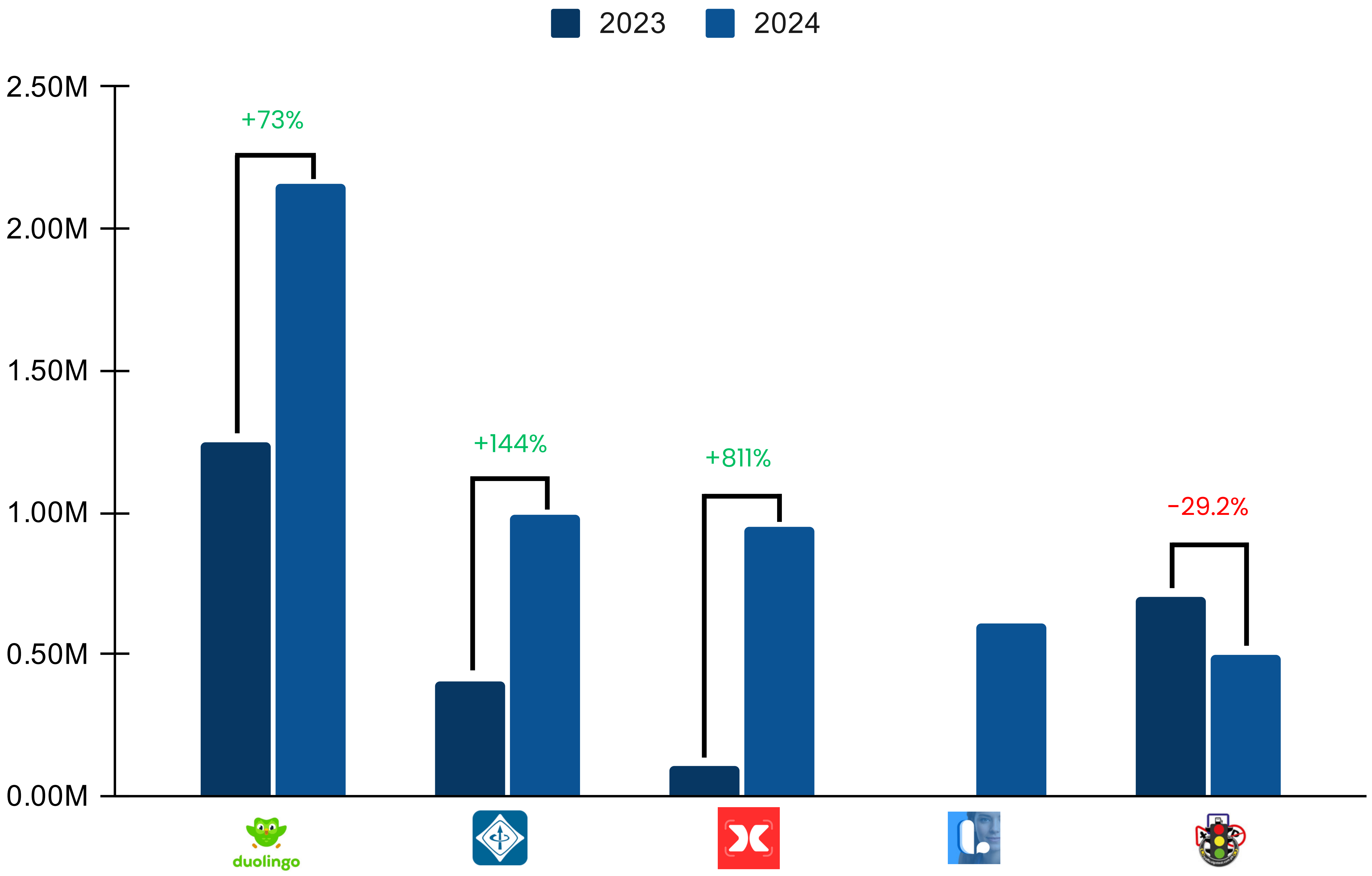


Digital-first business solutions are gaining traction with Shopify leading the charge in terms of growth with a 213% surge to 1.2M downloads, fueled by the rise of small-scale e-commerce. But perhaps more telling is the steady climb of Pak Identity, NADRA's app for digital ID verification, which grew 14% to 805K downloads in 2024.

Its popularity reflects how everyday services, banking, SIM registration, travel documents are moving online, creating sticky demand for official digital identity tools.

Note: 1. Cryptomania 2. WPS Office 3. Shopify 4. Jazz Business World 5. Pak Identity
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most-downloaded Education Apps

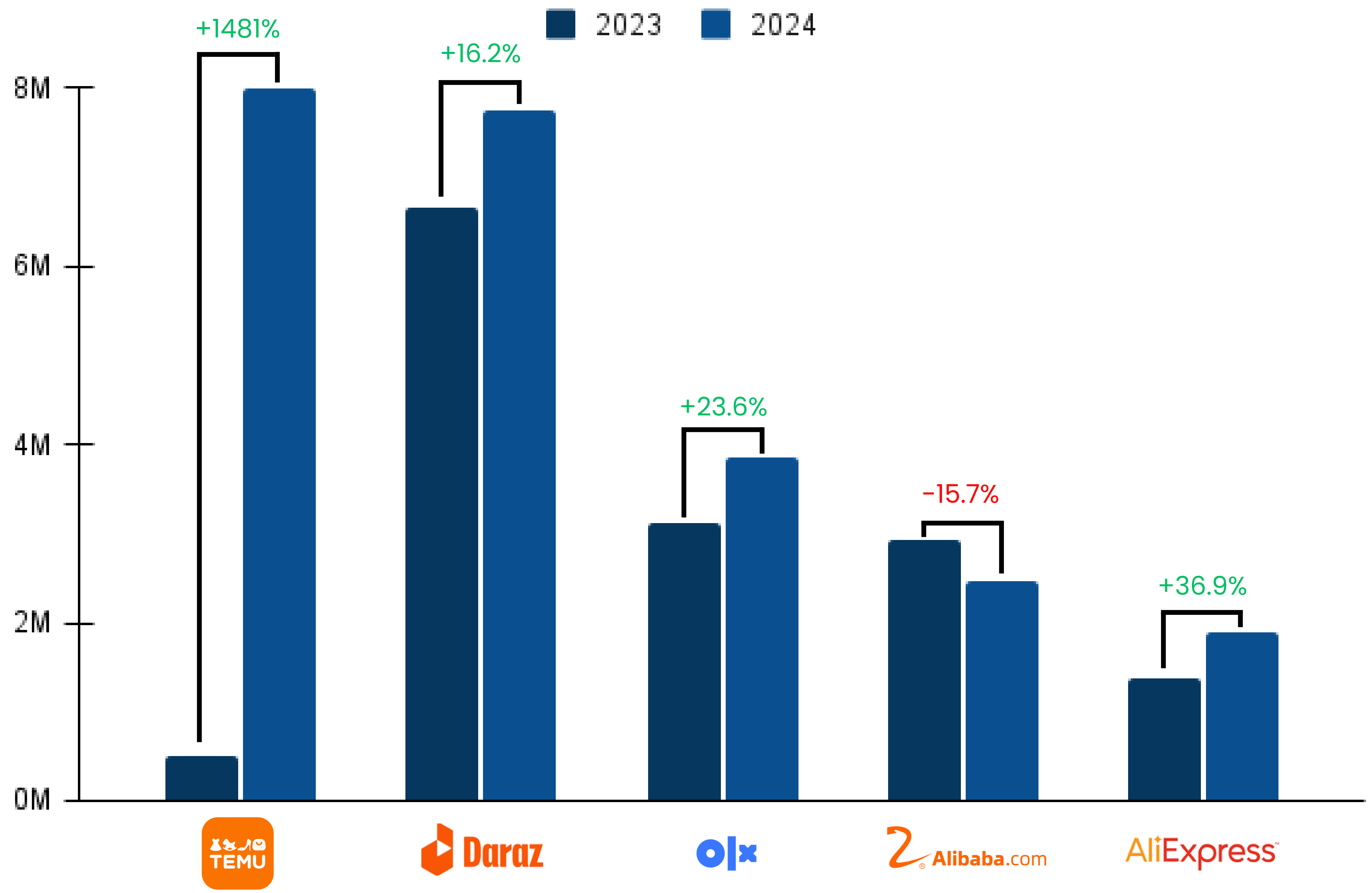


The edtech category was dominated by language learning platforms as Pakistani users sought new skills, possibly in search for greener pastures abroad. Duolingo kept the top spot with 73% growth to 2.2M downloads while newcomer Learn English amassed 612K installs in its debut year, suggesting strong appetite for language tools.

AI-powered homework assistant Gauth exploded from minimal presence to 945K while IEEE nearly tripled its user base to 995K. What was probably the most unexpected entry, Traffic Sign Test managed 495K downloads, proving that even driving theory has local demand.

App Names: 1. Duolingo 2. IEEE 3. Gauth: AI Study Companion 4. Learn English, Spanish: Learna App 5. Traffic Sign Test
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most-downloaded Shopping Apps



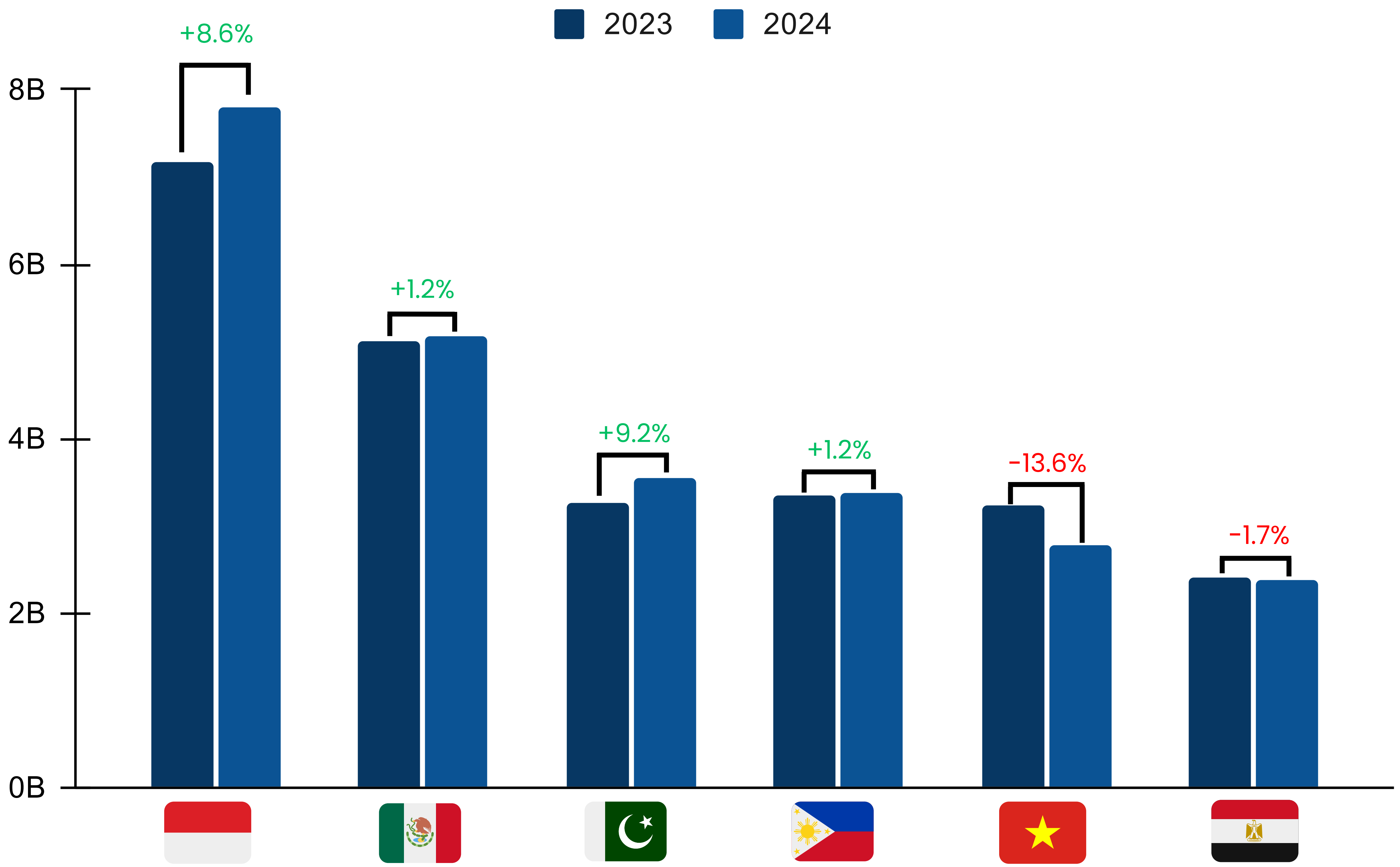
The e-commerce sector witnessed its most dramatic disruption in 2024 as Chinese newcomer Temu launched in Pakistan and not only captured everyone's attention but also amassed 8M downloads in its debut year. This spectacular entry helped it displace the long-time leader Daraz, which managed respectable 16% growth to 7.7M installs.

Traditional players showed mixed performance: OLX grew 24% to 3.9M, capitalizing on classified marketplace demand while AliExpress expanded 37% to 1.9M. The Chinese dominance was hard to miss in shopping, mirroring the retail and wholesale markets.

App Names: 1. Temu. 2. Daraz. 3. OLX. 4. AliBaba. 5. Ali Express
Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Pakistan vs. Peers

Pakistan outpaces regional peers with 9.2% download growth

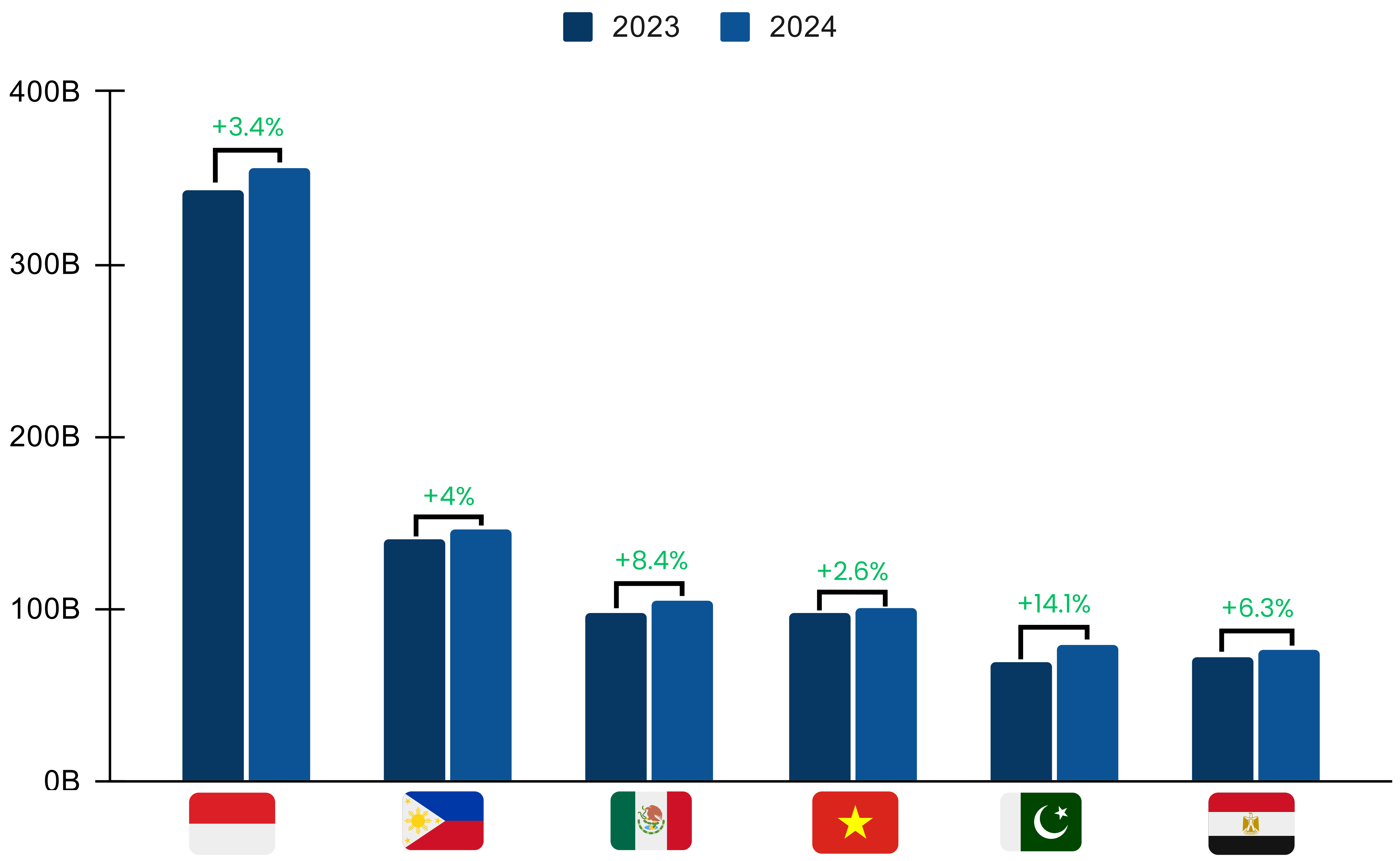


After last year's slowdown, Pakistan managed to bounce back strong and outperformed most regional peers, with downloads rising 9.2% or 300M to 3.56B, adding 300M new installs. This surge was fueled by rising smartphone penetration, which reached 55%.

While Indonesia posted similar momentum with 8.7% growth to 7.79B, Pakistan significantly outpaced Mexico's and the Philippines' 1.2% gain. In contrast, Vietnam's 13.6% decline to 2.79B suggests signs of app fatigue after years of phenomenal progress, while Egypt's 1.7% contraction to 2.37B downloads mirrored broader economic slowdown despite strong momentum in the startup space.

Source: State of Mobile 2025 - data.ai

Philippines and Pakistan lead regional engagement surge

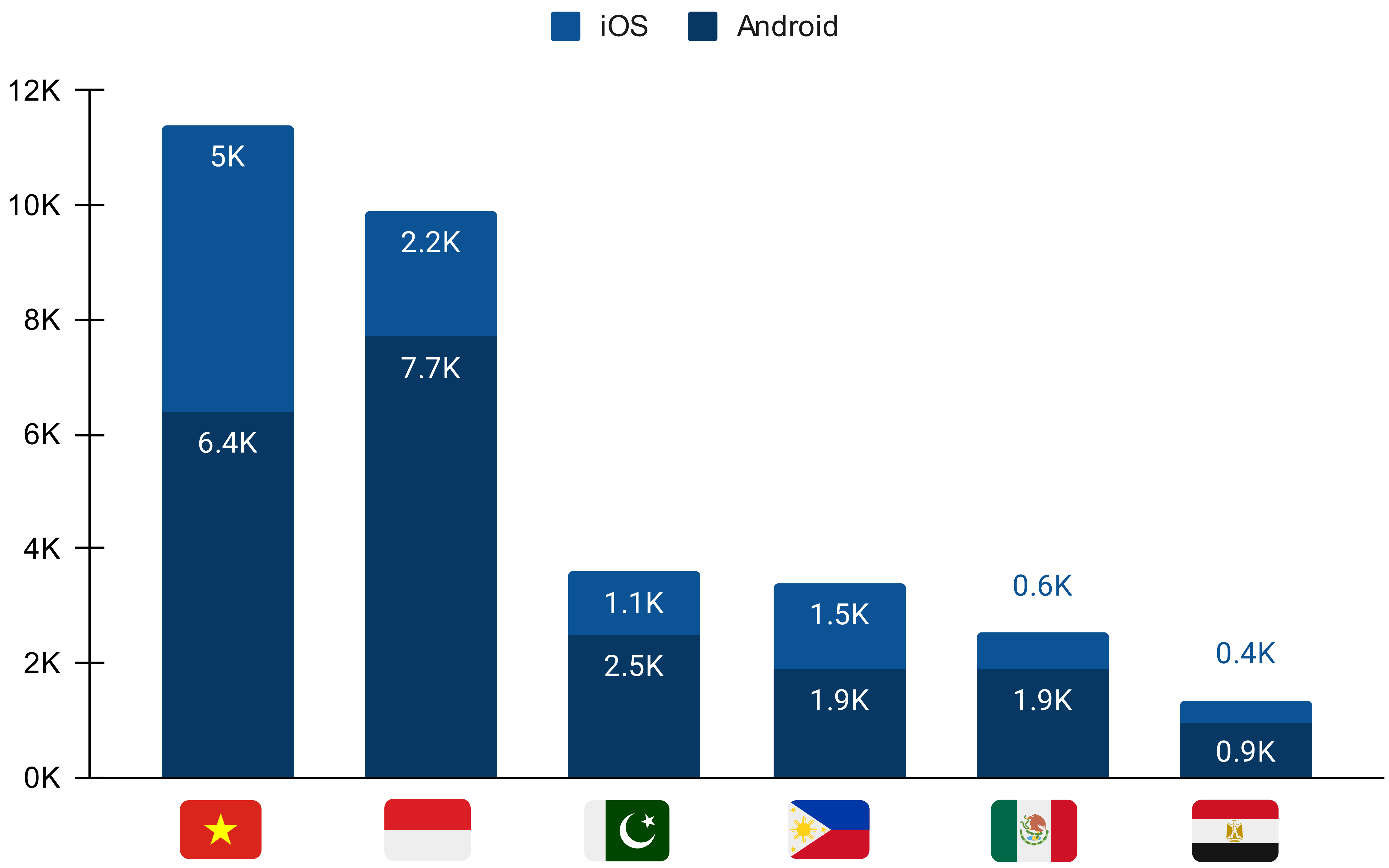


At the same time, Pakistan also topped peers in mobile engagement growth during 2024, with total app usage hours surging 14.1% to 79.1 billion, the highest rate of change among all comparable emerging markets, standing as the only country with double-digit growth. This outpaced the Philippines' solid 8.4% increase to 105 billion hours and Egypt's 6.3% growth to 76.3 billion hours.

Larger markets showed more modest gains, with Indonesia growing 3.4% to 355.1B hours despite maintaining its massive scale advantage, while Mexico expanded 4% to 145.9B hours. Vietnam recorded the smallest increase at 2.7% to 100.8B hours.

Source: State of Mobile 2024 - data.ai

Vietnam & Indonesia dominate emerging market app creation

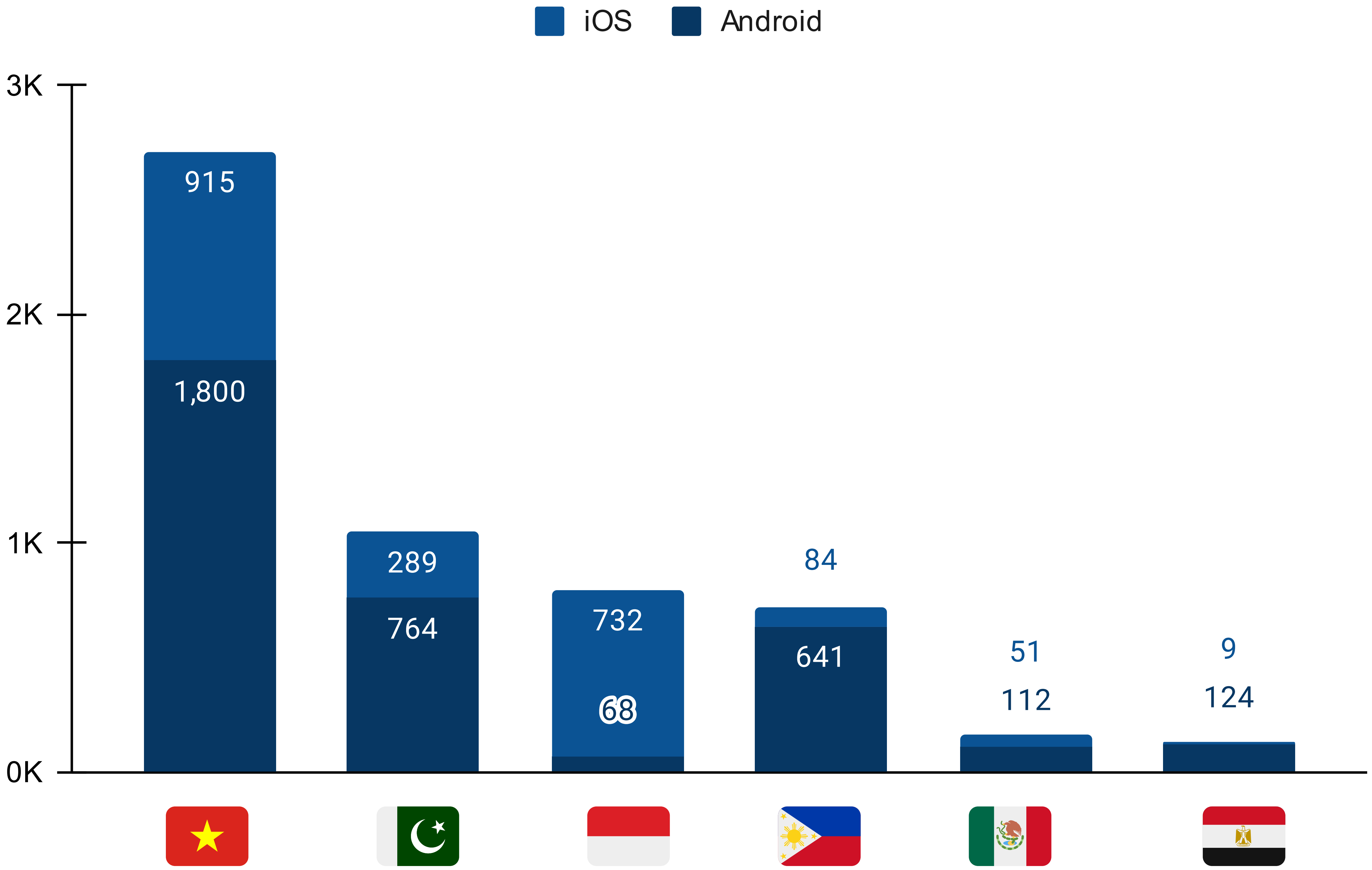


Despite tapering downloads and hours, Vietnam maintained its prowess as the regional app development powerhouse in 2024, launching the highest number of apps at 11.4K, heavily focused on iOS given the export orientation. Indonesia followed closely, though its development heavily favored Android, a logical strategic choice given the country's massive Android user base and the platform's dominance in price-sensitive Southeast Asian markets.

Pakistan ranked third regionally, with developers showing similar Android preference, likely driven by the platform's overwhelming market share and more accessible development barriers

Source: Appfigures Note: These are cumulative numbers, both active and inactive, across apps and games. It may involve some duplication where same app is available on iOS and Android.

Vietnam and Pakistan produced the most games in 2024



The same trend was visible across games where Vietnam topped in new titles launched, with almost two-thirds being on the iOS, more than all other comparable markets combined. However, in percentage, Filipino developers created significantly more iOS games than Android. Indonesia's approach was polar opposite, showing overwhelming reliance on Google Play, possibly due to a bigger local market.

Pakistan managed to grab the second place by total titles launched, of which just under three-fourths were iOS. This is quite understandable given that monetization per user for Apple devices is substantially higher.

Source: Appfigures | Note: The numbers may involve some duplication where same app is available on iOS and Android and include both active and inactive products.

Leaderboard

Most downloaded apps in Pakistan

	APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
	TikTok	ByteDance	32.4M	Social Media
	CapCut	ByteDance	27.1M	Video Player & Editor
	Facebook	Meta	24.3M	Social Media
	Whatsapp	Meta	22.7M	Communication
	Whatsapp Business	Meta	20.9M	Communication

Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most downloaded games in Pakistan

APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
Subway Surfers	Sybo Games	13.1M	Arcade
Yalla Ludo	Aviva Sun	12.3M	Board
Ludo King	Gametion	12M	Board
8 Ball Pool	Miniclip.com	11M	Sports
Ramp Car Games: GT Car Stunts	Fun Drive Games	8.2M	Puzzle

Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Most downloaded apps developed in Pakistan

APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
Easypaisa	Telenor Microfinance Bank	12M	Finance
Time Warp Scan	Apps Resort	11.7M	Photography
My Zong	CMPak- Zong	10.7M	Communication
Muslim Prayer- Qibla Compass	Visionary AI	10.6M	Lifestyle
JazzCash	JazzCash	10.4M	Finance

Source: Appfigures Note: includes iOS, Android and lite versions, where available

Most downloaded games developed in Pakistan

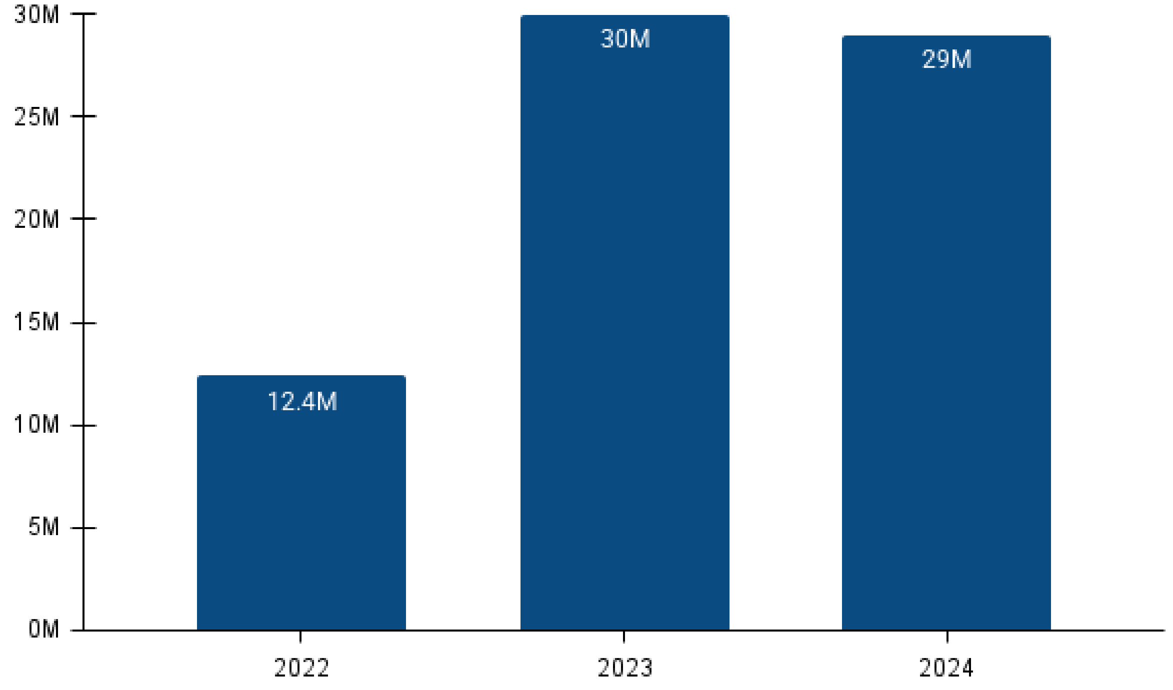
	APP NAME	DEVELOPER	DOWNLOADS	CATEGORY
	Spinner Merge	Sunday.gg	18.2M	Arcade
	Dude Theft Wars FPS Open World	Poxel Studio Games	16.6M	Action
	Coach Simulator: Bus Game	GamePark	15.3M	Role Playing
	Bus Simulator: 3D Bus Games	game Park	13.8M	Role Playing
	Offroad Truck Simulator	GAMEXIS	12.9M	Strategy

Source: Appfigures | Note: includes iOS, Android and lite versions, where available

Portfolio Spotlight: Jazz

Portfolio Spotlight: Tamasha

App Downloads



17.1M
MONTHLY ACTIVE USERS

1.35M
PAID SUBSCRIBERS

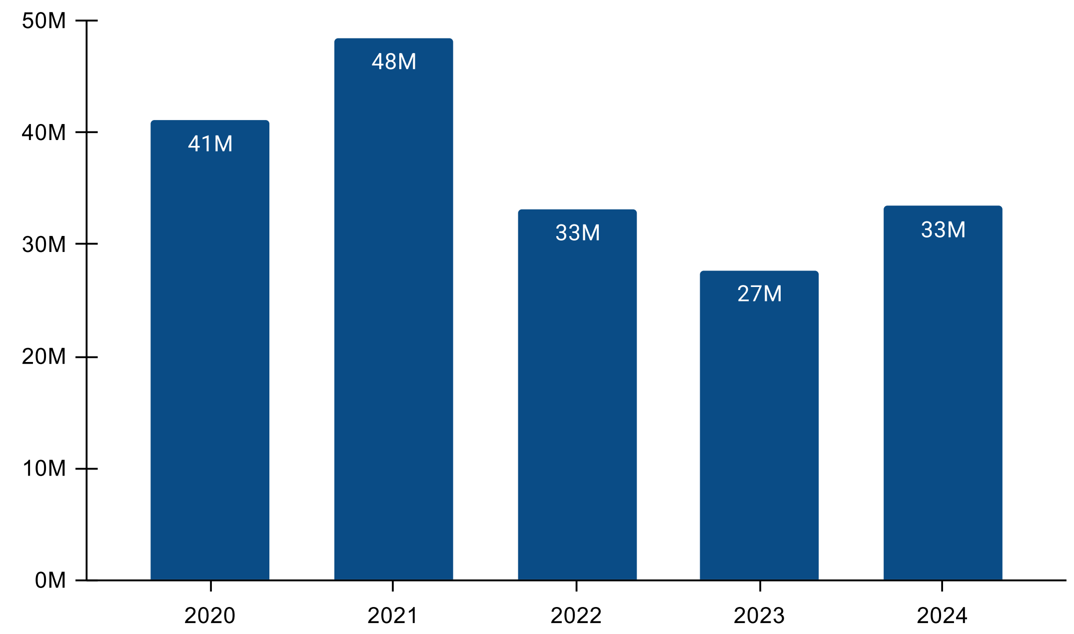
110 Mins
WATCH TIME PER USER

750M+
AD IMPRESSIONS

Tamasha's story is no longer just about cricket. After making headlines in 2022 with 12.4 million downloads and exploding in 2023 with a staggering 141.9% YoY growth in installs, the platform entered 2024 with a new challenge: maintaining momentum beyond the big tournaments. And it delivered, just differently. Despite downloads plateauing around 29M, Tamasha's true win came in engagement. The app closed 2024 with 17.1M MAU, a 61% jump from 2023, cementing its status as Pakistan's go-to entertainment app. Peak engagement hit record highs during the India vs. Pakistan T20 World Cup showdown, with a jaw-dropping 9 million DAUs in a single day. The platform racked up 12B+ total watch minutes for the second year running, and monthly watch time per user surged 41% to 110 minutes, showing that users are sticking around for more than just cricket. It's not hard to see why. With 250+ days of live sports, including PSL, ICC World Cups, English Premier League, and even Paris Olympics coverage, Tamasha has solidified its role as a sports powerhouse. But in 2024, it also deepened its entertainment catalog by adding 15+ new channels to its digital cable offering, bringing the total to over 90. Monetization followed engagement. Paid subscriptions soared 367%, from 289K to 1.35 million, while the platform delivered over 750 million ad impressions and secured partnerships with 50+ major brands like Pepsi, Coke, and Tapal, redefining how brands advertise on digital in Pakistan.

Portfolio Spotlight: SIMOSA

App Downloads



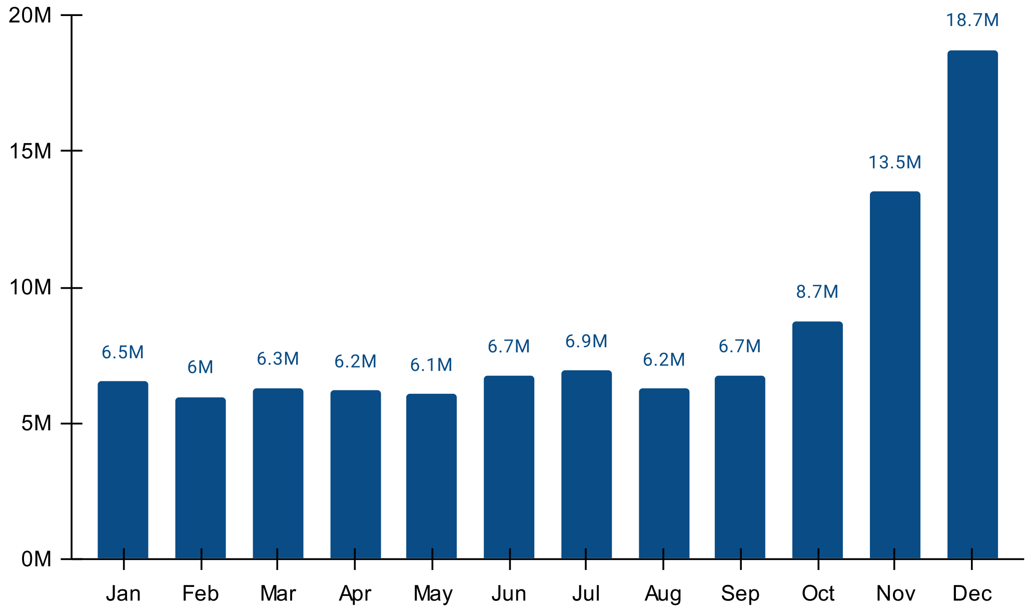
20.1M
MONTHLY ACTIVE USERS

5.84M
DAILY ACTIVE USERS

10/30
DAYS OF ENGAGEMENT

20.6%
YOY GROWTH

Monthly Transactions | 2024

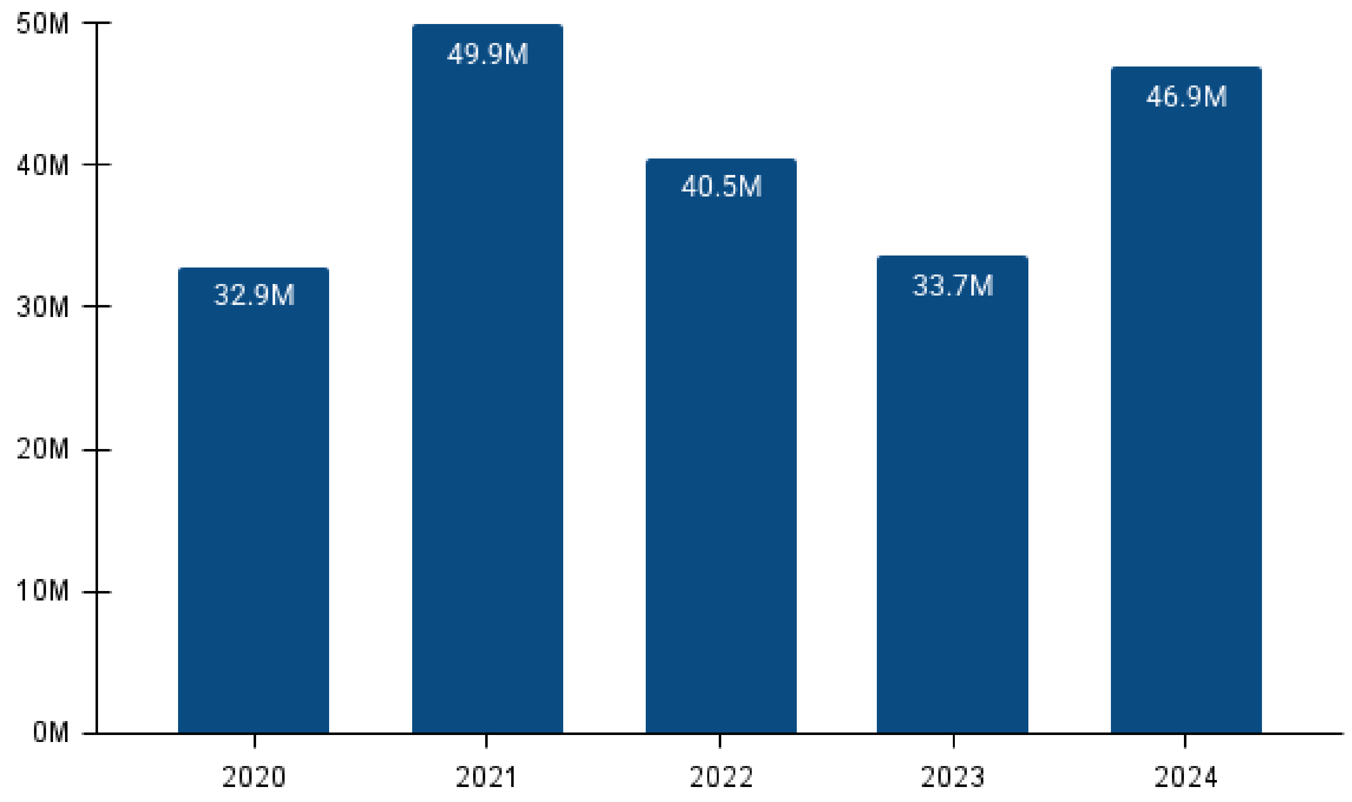


For over half of the last decade, Jazz World ranked consistently among Pakistan's most downloaded apps. So when the company decided to transition from the legacy app to a revamped self-care platform, SIMOSA, in early 2024, it was a bold but strategic move, aligned with Jazz's broader pivot toward building a brand-agnostic platform for the entire smartphone base of the country. The rebrand aimed to create a more inclusive digital experience, widening the app's appeal beyond a single telecom operator. Rather than pushing users into the new experience overnight, the rollout was deliberately phased and tightly controlled, allowing for early feedback loops. By February, SIMOSA had reached 6% user penetration, slightly below the 8% target, but by May, adoption had outpaced projections, hitting 75% penetration versus a 62% forecast, and eventually closing the year at 95%. Crucially, SIMOSA didn't just win on installs; it rapidly evolved into a primary digital service channel. Among smartphone users, only 12% of complaints were being handled digitally in January 2024; by May, that number had more than doubled to 26%, and by year-end, digital complaint resolution crossed the 50% threshold, easing pressure on call centers. Built on three distinct pillars, SIM Care, Lifestyle, and Social+, SIMOSA goes beyond just your usual SIM care app. SIMOSA's Lifestyle section gives users access to faith, gamification, and education features, while also offering e-commerce options to shop directly through the app. The Social section adds a community layer, enabling users to post updates, join groups, and connect with others, bringing a social media dimension to the platform. While transaction volumes started modestly, usage picked up sharply in Q4. In December 2024 alone, SIMOSA recorded 18.7 million transactions, a staggering 81% increase YoY, marking SIMOSA's successful emergence not just as a support tool but as a critical touchpoint in the company's digital service infrastructure. SIMOSA's Lifestyle section gives users access to faith, gamification, and education features, while also offering e-commerce options to shop directly through the app. The Social section adds a community layer, enabling users to post updates, join groups, and connect with others—bringing a social media dimension to the platform.

Source: Jazz

Portfolio Spotlight: JazzCash

App Downloads

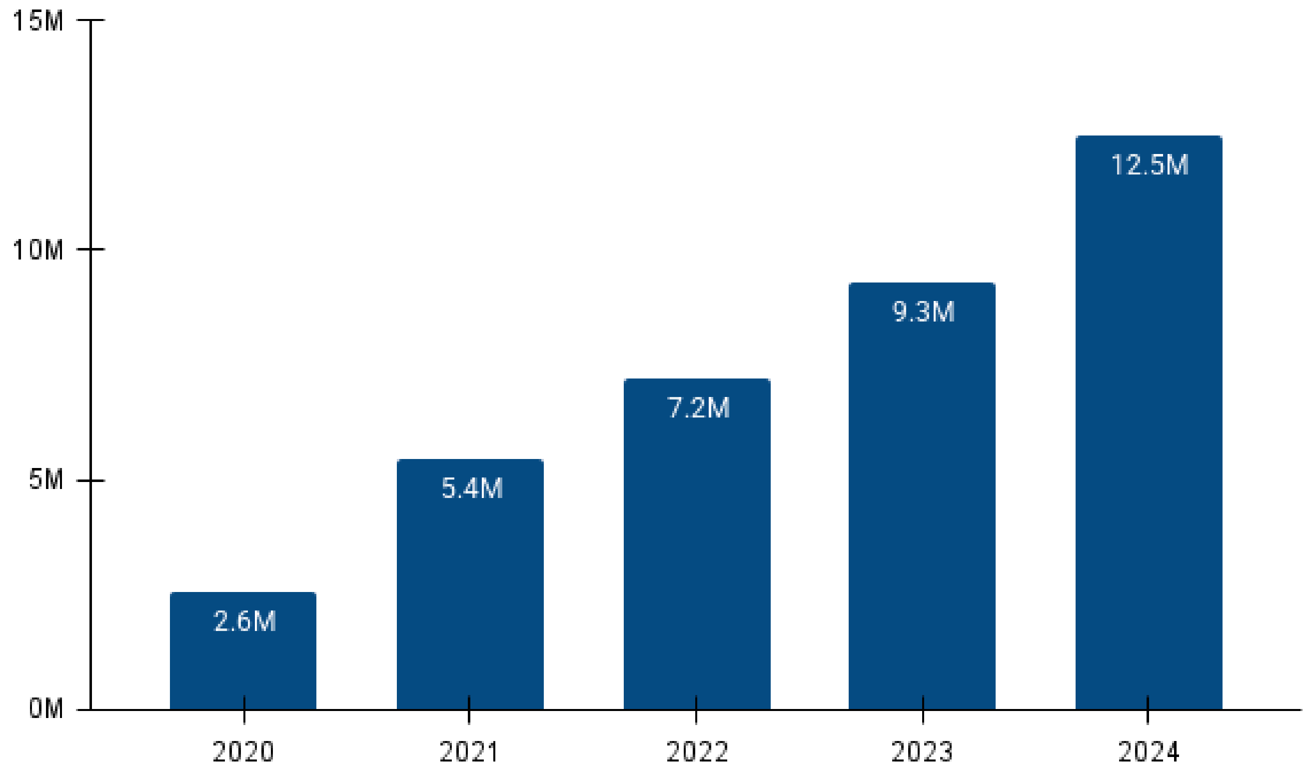


12.48M
MONTHLY ACTIVE USERS
(APP TRANSACTIONS)

7.19 M
MONTHLY ACTIVE USERS
(NON-APP TRANSACTIONS)

39.3%
YOY GROWTH
(DOWNLOADS)

App (Transaction) Active MAU



JazzCash's evolution reflects Pakistan's digital payments maturation, moving from acquisition-heavy growth to sustainable user engagement. After peaking at 49.9M installs in 2021, downloads fluctuated before surging again to 46.9M in 2024, demonstrating the platform's resilience through market cycles. The real transformation lies in user behavior. App-based transaction users nearly doubled from 7.18 million in 2022 to 12.48 million in 2024, while engagement deepened significantly, and average time spent per active user climbed from 14 minutes 23 seconds in 2022 to 20 minutes 36 seconds in 2024. This 43% increase in session duration indicates that users are conducting more complex transactions and exploring additional services. By 2024, JazzCash achieved a milestone few Pakistani apps can claim: 19.67 million monthly active transacting users, the highest ever recorded in the country's app ecosystem, making it Pakistan's biggest app by transaction MAU. Even as installs varied with market dynamics, active financial engagement surged, underscoring a deliberate shift in strategy from acquisition-heavy growth to long-term value creation.

Portfolio Spotlight: فکر FREE

165K	804K+	20+	43K	1.3M
TOTAL DOWNLOADS	ACTIVE POLICIES	INSURANCE PRODUCTS	DAILY ACTIVE USERS	MONTHLY ACTIVE USERS

Pakistan's insurance sector has long been marked by under-penetration and public skepticism. With insurance penetration remaining critically low at just 0.8% of GDP, including 0.5% for life insurance and a meager 0.3% for non-life, millions of households remain financially unprotected in the face of emergencies, illnesses, or income disruptions. These conditions demand not just an expansion of insurance coverage, but a radical redesign of how protection is offered. Enter FikrFree, Jazz's bold answer to this systemic gap. Built as a digital-first, mobile-native platform, FikrFree is Pakistan's most ambitious attempt yet at transforming insurance from a bureaucratic chore into a consumer-friendly experience. Within just three months of launch, FikrFree reached 1.3 million monthly active users (MAUs) and 43,000 daily active users (DAUs), figures that are exceptional for an industry traditionally dominated by in-person, agent-driven sales.

From a product perspective, FikrFree operates more like a super-app than a static insurance portal. The app brings together 20+ insurance products from various providers, covering health, handset, accident, and motor insurance, alongside fully integrated healthcare services, including an e-pharmacy and real-time video consultations with 400+ doctors. Everything is available within a single, unified mobile experience. For users, this means they can file a claim, refill a prescription, and purchase travel insurance, all without ever leaving the app. But the real genius of FikrFree lies in how it solves for distribution and monetization without relying on scare tactics or hard sells. The app is tightly integrated with Jazz and JazzCash's broader product ecosystem, meaning that insurance is now surfaced contextually, as a pop-up after you buy a bus ticket, as a toggle when you take a nano-loan, or as an optional add-on when you recharge your phone. This embedded insurance model transforms protection into a natural extension of daily digital activity. It's the same philosophy behind global successes like Grab (Singapore) or Revolut (UK), and FikrFree is the first serious attempt to adapt that logic to Pakistan's consumer base. Most impressively, the app makes insurance feel familiar, not foreign. Policies start from as low as Rs. 10 per journey or Rs. 565 per week for comprehensive handset protection, offering flexible, bite-sized coverage instead of bloated one-size-fits-all plans. The result is an app that doesn't just digitize insurance, it humanizes it.

Source: Jazz

Portfolio Spotlight: gamenow

3.5M+	2.3M	1000+	2M	2.5 Mins
TOTAL DOWNLOADS	MONTHLY GAMEPLAYS	GAMES	MONTHLY ACTIVE USERS	AVG ENGAGEMENT TIME

Once an overlooked corner of the country's digital economy, Pakistan's gaming industry has rapidly evolved into a high-growth, high-potential sector that's attracting global attention. In FY 2022–23 alone, the industry generated a total revenue of $300 million, including $157.9 million from exports, as local developers transitioned from outsourcing support roles to launching original IPs and full-fledged game titles. With a sharp rise in homegrown studios, a young and connected population, and billions of app downloads fueling demand, Pakistan is quickly becoming one of the most exciting frontier markets for gaming in the world. This momentum is underpinned by a rapidly growing gamer base. Pakistan had around 36 million online gamers in 2022, a number projected to hit 50.9 million by 2025. Mobile data remains among the cheapest globally, and smartphone adoption continues to climb, creating the perfect storm for gaming to thrive. This isn't just a user story, it's a production story too. Pakistan is now home to over 257 gaming and animation companies, employing over 12,000 people in roles ranging from design to development to VFX. And the country is increasingly on the radar of international studios and platforms, thanks to the volume of content being created and the low-cost, high-skill talent pool.

Recognizing this momentum and the glaring need for a cohesive local platform, Jazz, which already operates one of the largest app portfolios in Pakistan, decided to make a deeper play. After running GameNow as a web app for some time, the company formally expanded its footprint in gaming, turning GameNow into the country's first full-stack, aggregated gaming ecosystem. Its aggregation model allows it to offer a catalog of 1,000+ titles, generating 2.3 million monthly gameplays. By forging partnerships with over 13 game studios, including global franchises like PUBG and FreeFire, GameNow has positioned itself as the go-to destination for casual and mid-core gamers alike. Crucially, GameNow addresses one of the gaming sector's toughest challenges: monetization. In a market where in-app purchases and ad revenues remain limited, GameNow is unlocking new revenue streams through bundled access and telco billing.

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, Deal Street Asia, wamda, fDi Intelligence, FT Financial Times

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Co-Founder

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Co-Founder

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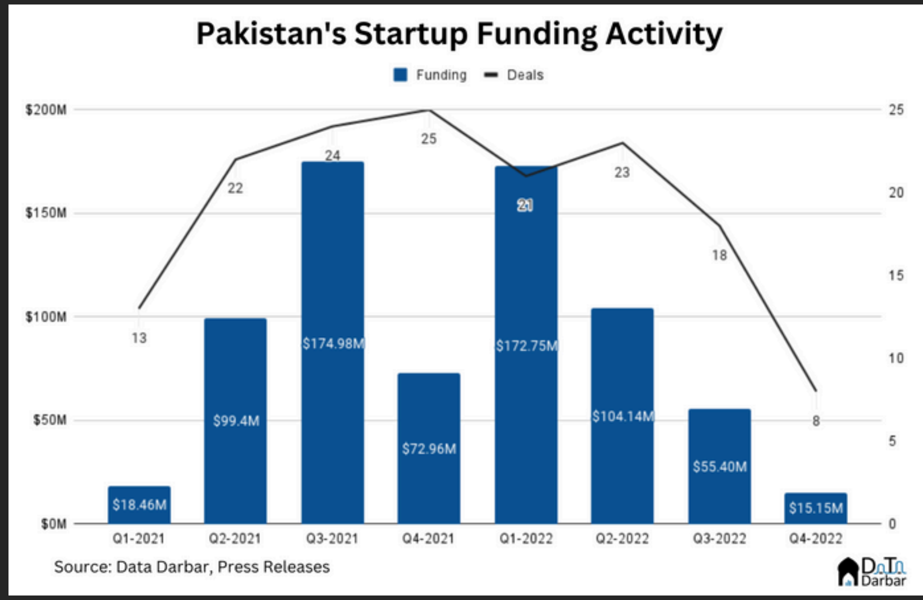

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