

Africa Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Africa Gaming Market size is estimated at USD 2.14 billion in 2024, and is expected to reach USD 3.72 billion by 2029, growing at a CAGR of 11.62% during the forecast period (2024-2029).

The rise of mobile gaming in Africa is aided by the rising internet connectivity, increasing adoption of smartphones, and the advent of high bandwidth network connectivity, such as 5G, which have further increased the demand of the gaming market across the region.

Key Highlights

- Africa is regarded as one of the significant regions globally where the young population is rising. By 2050, Africa's young people, i.e., those aged between 0 and 24 years in certain countries of the region, will witness an increase of around 50%, according to the United Nations. Africa is anticipated to have the most significant number of young people in the coming decade. Hence, Africa's youth is highly crucial to the continent's future when it comes to gaming.
- The growing mobile penetration in the African region had accelerated since 2019 when during the year, about 272 million Sub-Saharan Africans started using mobile, according to GSMA. Moreover, this number is expected to increase to 475 million by 2025, amongst which more than a quarter of these connections will be on a 4G network. Meanwhile, in North Africa, 290 million people own cell phones. This high usage of mobile phones with 5G networks is expected to drive the market significantly.
- Moreover, Nigeria's gaming industry has expanded drastically, benefiting from the large and youthful population, improving the internet penetration rate, and increasing access to internet-enabled devices. The proliferation of connected devices in Nigeria has also led to extensive adoption of the technology, and people from all demographics enjoy digital gaming in its numerous forms. Mobile gaming is prevalent in Nigeria since smartphones and tablets are widely available and affordable.
- However, aspects like the rise in issues like piracy, laws, and regulations, and various concerns relating to fraud during gaming

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transactions might be a factor that can impede the overall growth of the market.

-The COVID-19 pandemic boosted the market in the region, especially in terms of online gaming among all age groups, implying that gaming is a central element in 21st-century leisure and entertainment. The major gaming vendors witnessed strong growth in downloads of multiple mobile games, primarily during COVID-19. Moreover, with the COVID-19 outbreak, cloud gaming picked up its pace as one of the best options to stay at home entertainment. The market witnessed a significant uptick in downloads of various applications, the time spent, and engagement in online games.

Africa Gaming Market Trends

Improvement in Technology and Internet Network Access

- The enhancement of mobile technology and its associated use cases have unleashed technological evolution in the region. The surge in overall smartphone usage leading to internet adoption has further leveraged the rise in the adoption of everyday use cases such as gaming.

- 5G is one of the major drivers for the growth of the smartphone, leading to the surge in competitive gaming in the region. According to Ericsson Mobility Report, in the Middle East & Africa region, the total number of subscribers for 5G services may reach 60 million by 2024, representing about 3% of all mobile subscriptions in the region. GSMA also estimates there may be around 50 million 5G connections across the MENA region, of which 20 million connections could be in the Arab States alone by 2025.

- Africa's overall share of internet users has grown drastically. Last year, around 13 % of internet users worldwide were from Africa, whereas in 2017, only 9.1 % of internet users were located in Africa. In addition, the Internet penetration in Africa is about 40 %. This rise in the total number of internet users and Internet penetration in Africa significantly augment the market's growth.

- Additionally, the launching of various gaming smartphones by several regional companies is increasing the market's overall growth rate. For instance, in last year, MediaTek, a fabless semiconductor company, reiterated its commitment to providing new technology solutions to enable the rollout of future-ready smartphones in the South African market. The company announced the launch of its premium gaming chip, MediaTek Helio G95, along with its offerings across the spectrum, including G90T, G85, G80, G70, G35, and G25 chips. The products were aimed at the premium 4G gaming smartphone segment. The company has also associated with various smartphone brands such as Oppo, Xiaomi, and Infinix to launch up to ten premium, feature-rich smartphones powered by the MediaTek Helio G series last year.

- As per Ericsson, the overall monthly smartphone data traffic per smartphone in Sub-Saharan Africa is projected to amount to 10.99 gigabytes (GB) per active device by 2027. Last year, the average data traffic per active smartphone amounted to 2.89 GB per month. This overall rise in the average data traffic per active smartphone will exponentially drive the market's growth.

Nigeria is Expected to Hold a Considerable Market Share

- In the current market scenario, the existence of a vast customer base of young middle-class Nigerians is a significant aspect contributing to the rise in the gaming industry in Nigeria. This is further expected to create ample growth opportunities for the market to grow and sustain throughout the forecasted period.

- Gamers in the country are shifting to social gaming, the free-to-play revenue model with downstream in-game purchases. It has become increasingly popular in the country. Also, the gaming industry in the country is bringing millions of dollars to countries per year. This is for all categories of video games: mobile, PC, Xbox, and PS. Due to such factors, Nigeria is expected to contribute substantially to the entire African market.

- Also, the gaming market in Nigeria is anticipated to witness a considerable surge in overall usage of the internet through mobile

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over the forecast period, with international market players injecting large-scale investments into the region. Hence there is a constant rise in subscriptions, resulting in the growth of the mobile gaming sector within the country. As per NCC (Nigeria), Between 2017 and 2021, MTN was the most significant mobile internet provider in Nigeria. With around 58.81 million subscriptions last year, it accounted for over 40 percent of the Nigerian mobile internet market. Other major mobile operators in Nigeria were GLO and AIRTEL, with more than 35 million subscribers.

- Moreover, the Nigerian gaming market trend is aided by improved mobile penetration. For instance, according to Hootsuite's data, the mobile penetration rate had increased to 51% this year, owing to increased awareness through aggressive expansion and marketing by operators and technological improvements in payment platforms. Nigeria's gaming industry is fragmented, with the presence of various small market players. As user behavior changes and spending needs increase, the industry is anticipated to reach consolidation over the forecast period.

- As per NCC (Nigeria), the total number of active internet subscriptions stood at around 139.7 million in Nigeria in July 2021, whereas in February this year, the total count reached about 143.6 million in Nigeria. The vast majority of these connections are mobile GSM connections. This rise in the total number of active internet subscriptions in Nigeria will amplify the market's overall growth rate throughout the forecasted time frame.

Africa Gaming Industry Overview

The African gaming market is highly fragmented as the demand for online games and increasing penetration of mobile applications is growing across the region. It will attract new players to this market over the next few years. Some of the leading participants in the market are Kucheza, Kagiso Interactive, Nyamakop, Celestial Games, and Kuluya. Key developments in the region are as follows:

In February 2022, Union Bank, through its education platform Edu360, partnered with the foremost gaming company Kucheza, to organize an edition of the Mobo Game Jam, an annual game development competition designed to encourage inclusivity, sustainability, and humanity among young innovators from Nigeria and the UK between the ages 8 -18 years. The goal of the competition is to promote gaming as a tool to harness the power of creativity and imagination of young people while bridging the digital skills gap within the educational system.

In January 2022, South African mobile gaming startup Carry1st raised a USD 20 million Series A extension round from investors, including Andreessen Horowitz, Avenir, and Google, to help it scale all across Africa.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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