

GAMES FOR CHANGE AFRICA: FROM AWARENESS TO ACTION

Key Insights and Strategic Directions

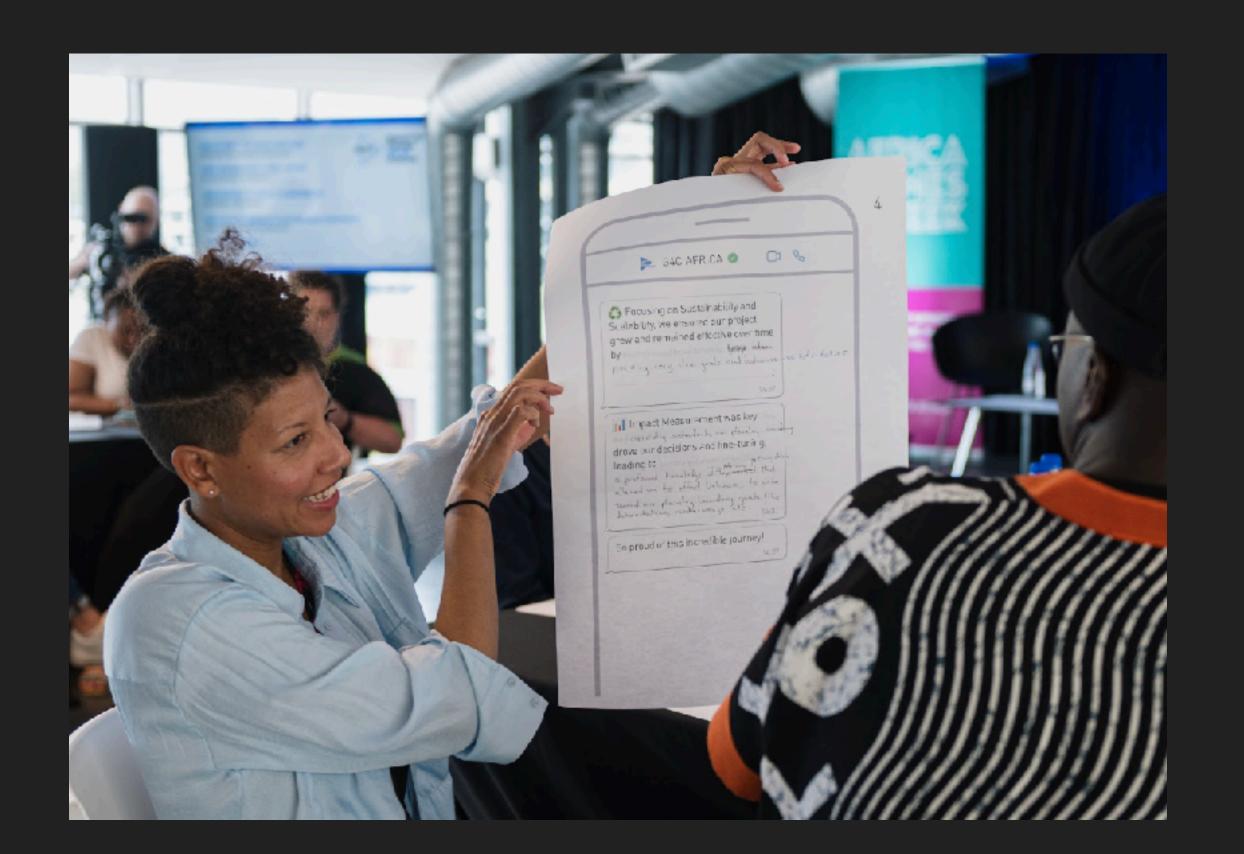


THE PURPOSE

This report serves as an exploration of the African gaming industry with a focus on impact games.

Drawing insights from existing industry research, global initiatives and local expertise, it attempts to map out the current state of the industry, pinpointing both the opportunities that lie ahead and the hurdles that need to be overcome.

This initiative aims to foster understanding, inspire action, and guide stakeholders towards collaborative efforts for industry growth, as well as to empower creators and communities to leverage games as a powerful tool for social and economic transformation across Africa.



METHODOLOGY

The methodology of the report integrates comprehensive research, including industry reports and international studies, with insights from a wide array of stakeholders across academia, creative sectors, and both private and public domains.

Through interviews, focus groups, and engagement sessions at the flagship chapter event, the G4C Africa Festival, the process culminates in actionable strategies and recommendations tailored to diverse industry players.



Input

- Research: Game industry insights and global studies
- **Stakeholders:** Academia, key industry players, local and international entities, representatives of public and private sectors

Process

- Stakeholder interviews and focus groups
- Curated engagement at industry events

Outcome

- Targeted stakeholder recommendations
- Strategic action plan for G4C Africa

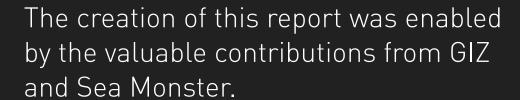










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For over 20 years, Games for Change has empowered creators and social innovators to use games and immersive media as drivers of social change: helping people learn, improve their communities, and make the world a better place.

GAMES FOR CHANGE

G4C is a New York based non-profit with a mission to drive real-world impact through digital games and immersive media.

G4C partners with technology and gaming companies as well as nonprofits, foundations and government agencies, to run world-class events, public arcades, design challenges and youth programmes.

G4C supports a global community of game developers working to use games to tackle real-world challenges, from humanitarian conflicts to climate change and education.





G4C Network

FOUNDATIONS & NON-PROFITS































































GOVERNMENT AGENCIES































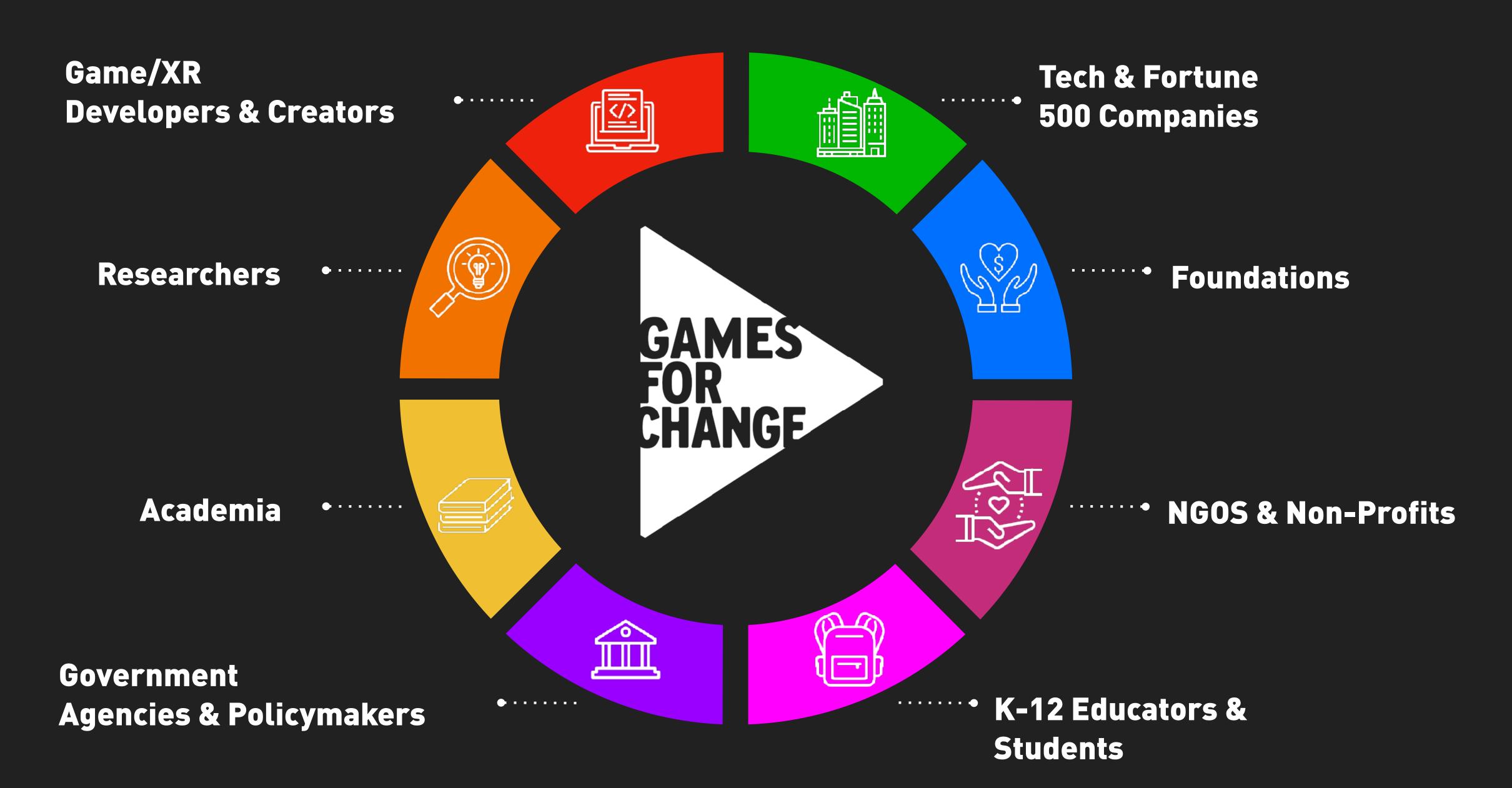






GAMES FOR CHANGE COMMUNITY





GLOBAL FAMILY OF GAME CHANGERS























Established in South Africa in 2021, G4C Africa stands as one of the newest chapters of the global Games for Change network, representing the African impact gaming community and ensuring its voice and contributions are recognized on the global stage.







G4C Africa is rooted in the belief that games have the potential to do so much more than entertain. With the appropriate strategy, games can significantly enhance education, foster social change, and contribute meaningfully to the economic development of the African continent.

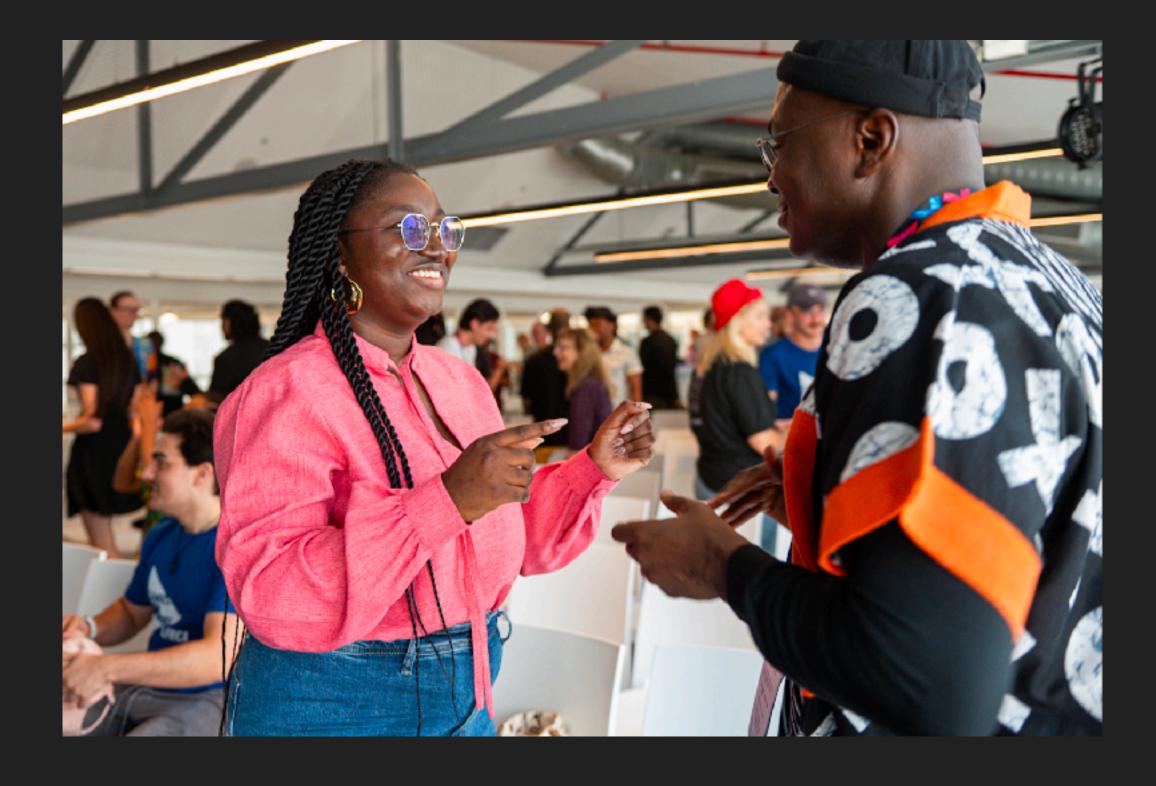
GAMES FOR CHANGE AFRICA



In just three years, G4C Africa has built a strong network across the continent. This success is rooted in a strategy of hosting local events and spotlighting African games, showcasing the continent's immense potential on the global stage. The chapter's overarching goal is to foster unity among individuals and organisations who share the same vision.

Our mission is to empower the evolving African impact gaming ecosystem and to build a community where games are leveraged for their potential to drive positive real-world change.

Exploring the power of games to drive social impact and economic growth in Africa.



9

Board members 21

Game studios

19

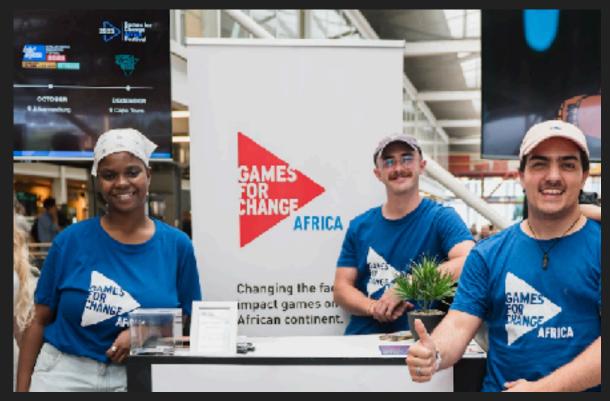
Partner organisations

3

Annual Festivals

1000+

People attended G4C Africa events





Games for Change Africa Festival

The G4C Africa Festival is a unique event dedicated to highlighting the relationship between games and social impact. The Festival connects creators, funders, and thought leaders to explore the potential of gaming to tackle the world's most pressing challenges relating to the UN's Sustainable Development Goals including education, health and wellness, sustainability, civic engagement and more.

Through inspiring talks and panels, hands-on workshops and structured networking sessions, the Festival is a platform for sharing and promoting new ideas and products for digital storytellers and game makers, from Africa and beyond.



Partners and sponsors



























G4C AFRICA FESTIVAL 2023 BY NUMBERS



The third G4C Africa Festival was held on December 1, 2023 in Cape Town during Africa Games Week - the continent's leading games industry event. This year, the goal was to not only showcase the industry, but to catalyse real progress using games and game design to deliver on a brighter African future.









People Attended



14

Countries Represented



19

Speakers and Presenters



49%

Female Speakers



Talks, Panels and Sessions



13

Hours of Programme





MOVING FROM AWARENESS TO ACTION

The central theme of the G4C Africa Festival 2023 emphasised that beyond raising awareness, adopting a pragmatic and practical approach is crucial for devising successful strategies to achieve our ultimate mission.

Over the last three years, our efforts have been focused on spotlighting the African gaming industry and increasing its visibility. We're now ready to advance from merely creating awareness to actively initiating concrete actions. Our goal is to foster the development of long-lasting, impactful projects with gaming studios, organisations, and passionate stakeholders, both locally and internationally.

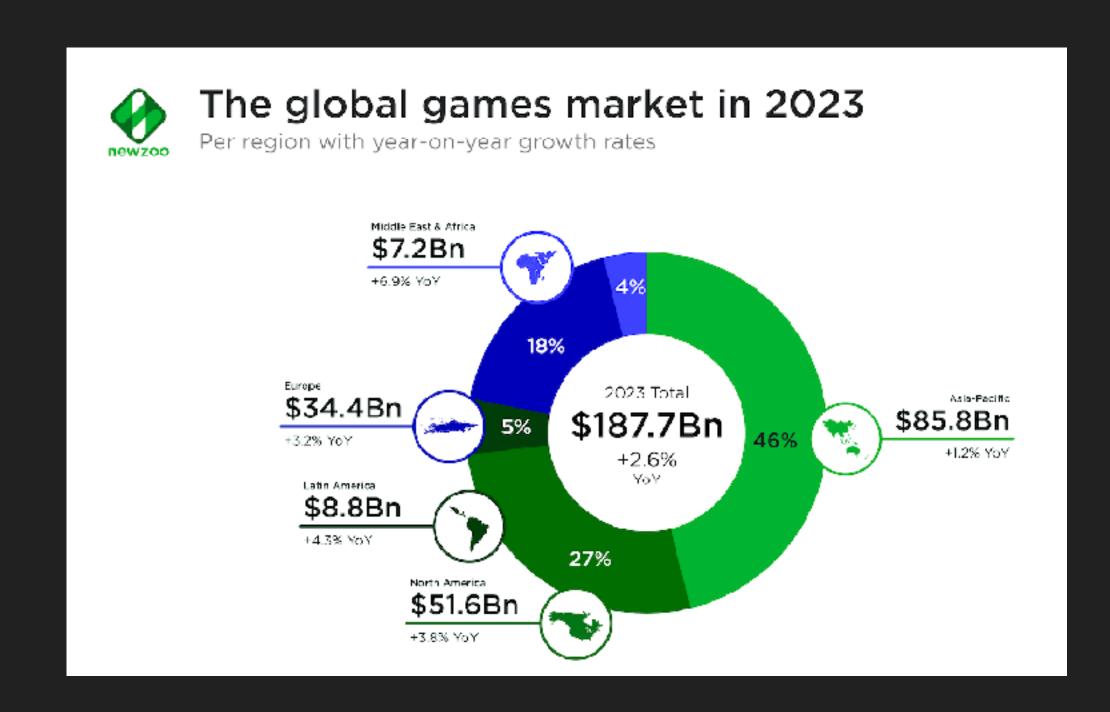
These collaborations are designed to not only facilitate the exchange of ideas and offer learning and practical experiences but also to encourage the growth of the gaming industry in Africa and provide a foundation for future innovation and development.



GAMES INDUSTRY OVERVIEW



GLOBAL GAMES INDUSTRY: RISING STARS





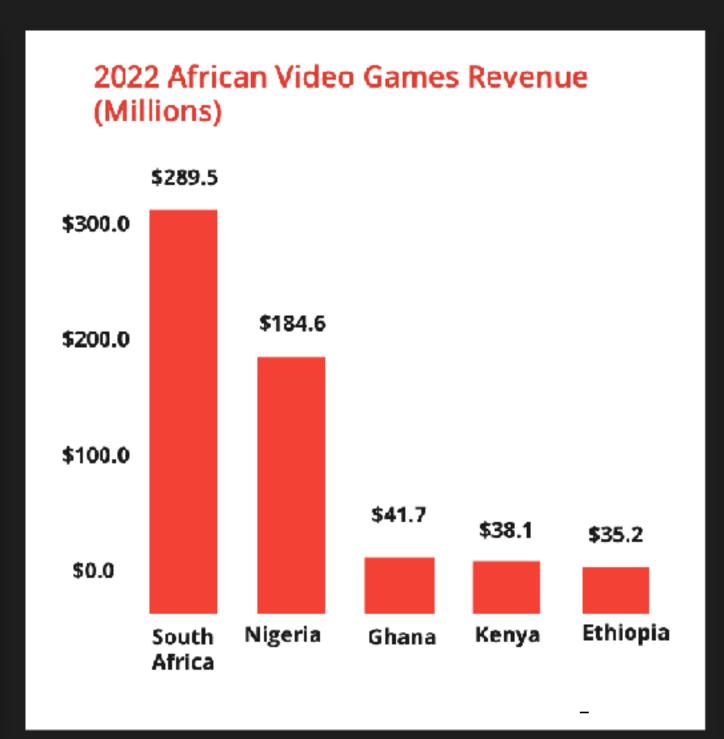
Newzoo, 2023

The global gaming industry has matured significantly, with established markets experiencing steady growth. However, **the Middle East and Africa** are emerging as dynamic regions, showcasing rapid expansion in both the gaming market and player base, making them increasingly attractive to industry stakeholders.



RAPIDLY EXPANDING AFRICAN MARKET







Africa Games Industry Report, 2024

The African gaming market is on track for rapid growth, with a focus on **mobile gaming** driven by a **young** audience. Active game developers in key regions are transforming Africa into a fertile ground for innovation and sector advancement.

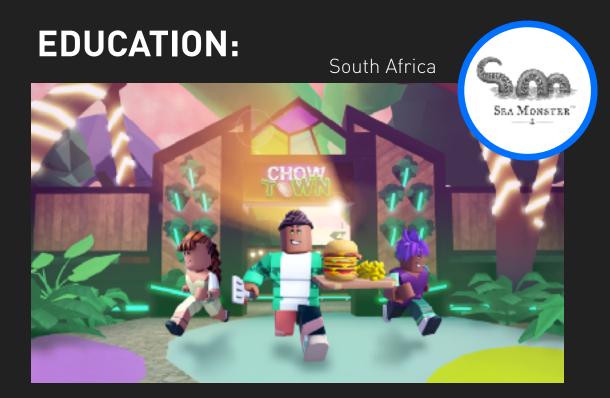


GAMES FOR IMPACT

Impact games, also known as serious games or games for change, are designed with the **primary goal of creating positive change in society.** Unlike traditional video games that are primarily designed to offer entertainment, impact games serve a greater purpose and focus on driving specific social, learning or business outcomes.

Using the interactive and immersive nature of gaming to influence players' understanding, attitudes, and behaviours, impact games can address a wide range of issues, from climate change and health to education and civic engagement. They are also able to translate and communicate complex issues in accessible ways which engages users deeply, and motivates them to act towards real-world change.

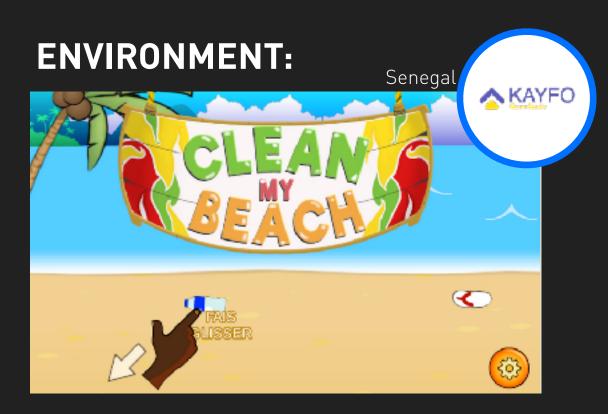
Examples of the impact games made in Africa:



Chow Town is a Roblox experience designed to inspire future entrepreneurs with positive money messages as they create and build their own restaurant business.



Wewe is a mobile game that educates the youth on corruption, violence and hate speech to help them make informed electoral choices.



In Clean the Beach, players remove litter and revive the beach's magic in order to attract cute animal back.



Hello Nurse is an interactive story app for supplementing training for health professionals.





Impact games hold significant potential to drive social change and offer educational value, addressing specific issues and engaging players in meaningful ways. However, their niche focus can lead to challenges in scaling and monetisation compared to pure entertainment games which ,generally speaking, can have a greater market appeal and more established revenue models.

IMPACT GAMES

ENTERTAINMENT GAMES

Purpose	Tackling real world challenges	Financial profitability
Focus	Purpose driven: Learn a skill, participate in a cause, reach the audience, take action, etc.	Desire driven: Enjoyment, relaxation, socialisation, challenge, exert control, etc.
Audience	Targeted groups	Mass-market appeal
Monetisation	Absence of a scalable business model	Variety of established business models
Source of Funding	Public sector, corporate CSR, marketing and R&D departments, and more.	Commercial investment channels

IMPACT GAMES ARE SERIOUS BUSINESS

The impact gaming sector is thriving as impact games have a broad spectrum of global applications.

Their ability to engage users about critical issues makes impact games appealing to a wide pool of stakeholders, ranging from government bodies and large retailers, to financial institutions and healthcare providers.

Their growing recognition and increasing appeal is indicative of the shift in the role that the gaming industry can play in societal and global development.



The global impact games market revenue is growing:

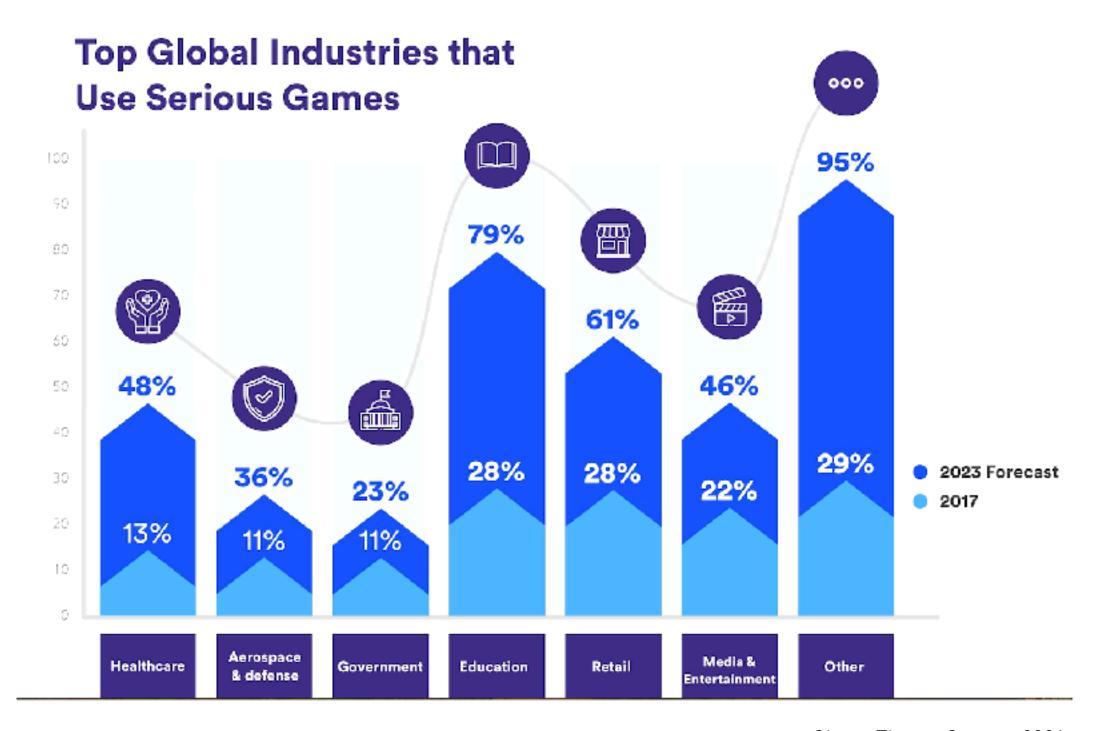
\$3.5 BILLION

In 2018

\$24 BILLION

in 2024

Mordor Intelligence, 2023

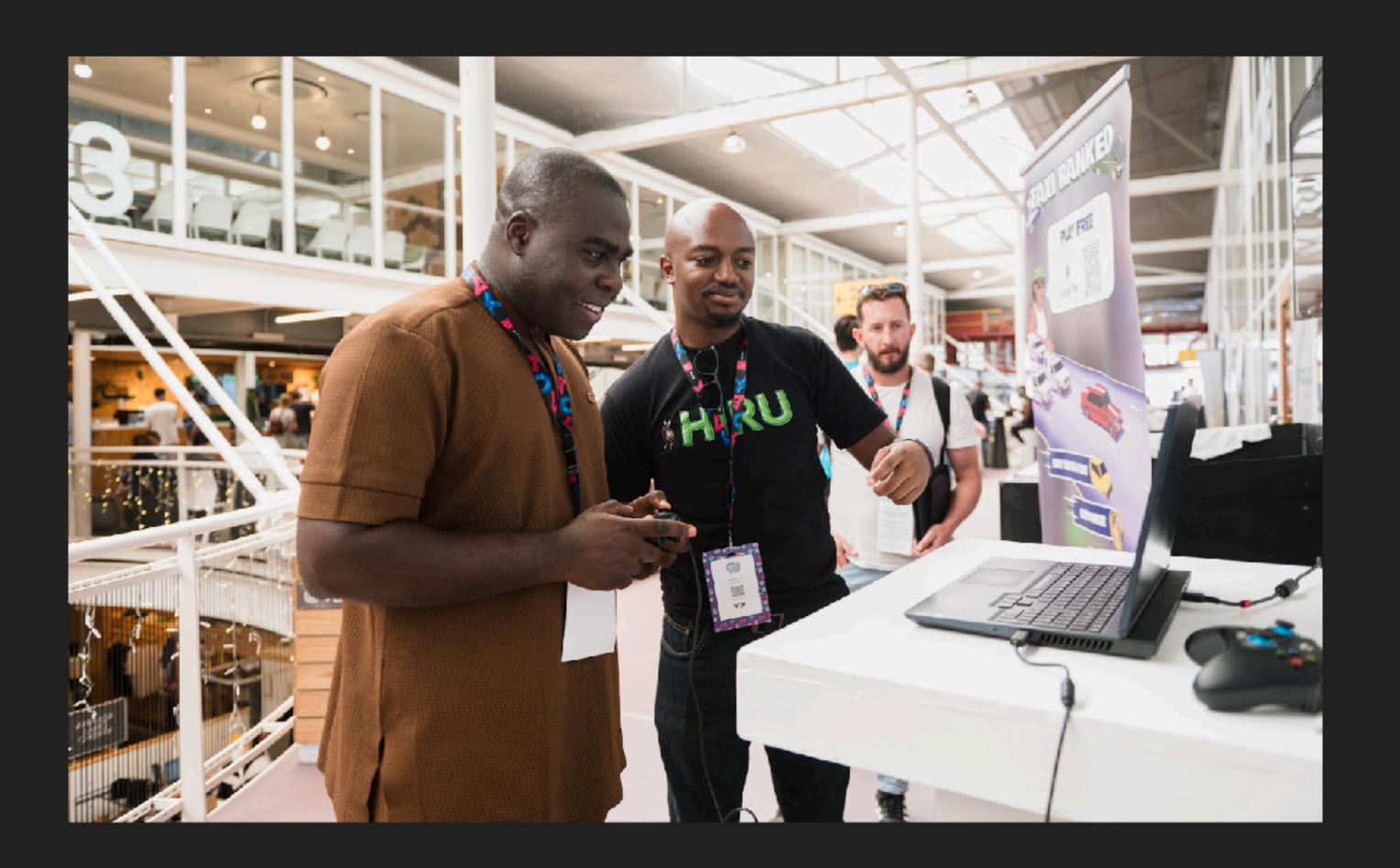


Chaos Theory Games, 2021



HOW MUCH OF THIS IS...?

- INSPIRED by Africa
- MADE in Africa
- SOLD in Africa
- OWNED by Africa





AFRICAN IMPACT GAMES LANDSCAPE





Hugo Obi,Founder: Maliyo Games,
Nigeria

Every game made in Africa is an impact game.



- Expansion of local game production stimulates economic growth by contributing to job creation and introducing revenue streams.
- Game design and development offer a platform for local talent to express themselves in a meaningful way, fuel their creativity, enhance skills, build careers and innovate, sometimes without leaving their homes.
- Locally produced games play a crucial role in challenging outdated stereotypes, celebrating the continent's diverse cultures and voices, and authentically representing African heritage on the global stage.

This wide-ranging influence shows just how important gaming is for Africa's growth on many levels.

GAMES FOR CHANGE AFRICA

POTENTIAL OF THE IMPACT GAMES INDUSTRY IN AFRICA

Strengths

Inspirational Stories and Diverse Voices:

• Africa's stories are largely untold. The African game sector empowers storytellers from across the continent to share their unique stories. With a unique approach to storytelling and game design, these authentic African games offer a compelling contribution towards the global gaming market with the potential to achieve global resonance.

Hardworking, Talented People:

• The continent is home to a dynamic mix of established game creators, developers, and studios, as well as a young, digitally savvy population eager to innovate and create.

Active Economies and Emerging Markets:

 Projected high growth rates for the regional games industry, particularly in the impact games sector, are supported by increasing mobile adoption and internet penetration.

Opportunities

Shifting Attitudes and Behaviours:

• Harness the immersive power of games to deliver prolonged voluntary engagement to drive social and business outcomes.

Educational and Training Applications:

• Leverage the increasing demand for educational and training applications that improve learning outcomes, accessibility, and livelihoods.

Awareness and Emerging Commercial Needs:

• Meet the growing commercial and marketing needs of the corporate sector, while addressing the information gap and facilitating action toward fulfilment of the SDG goals.

Transforming Ways of Work:

• Utilise the benefits of remote work to run collaborative projects and partnerships across the continent and beyond.



OBSTACLES TO GROWTH

Underdeveloped Value Chain and Limited Support:

- The industry is predominantly supply-led, with funding and investment heavily skewed towards the initial stages of ideation and concept development, such as game jams, hackathons, and incubators. As such, crucial phases are neglected like production, distribution, monetisation, and IP development.
- Public sector support within the continent is insufficient, characterised by scarce funding for the creative sectors, a low appetite for innovation or risk-taking, and a lack of incentivising tax benefits as seen in other regions.

The Missing Middle and Monetisation Challenges:

- A notable gap exists with few medium to large studios/content producers, leading to a talent drain and an over-reliance on external expertise.
- Monetisation and distribution face significant hurdles, including IP often being outsourced to the Global North, challenges in securing significant financial returns, a current lack of demand for paid content, low advertisement rates, and a limited use of credit cards.

Infrastructure, Visibility, and Market Awareness Issues:

- Despite relatively lower costs compared to other regions, entry barriers remain high due to expenses related to hardware, software, licensing, and skills development.
- Unreliable infrastructure in many African countries includes inconsistent electricity and internet services, compounded by the high cost of data.
- The visibility of African gaming content, studios, and creators is low, coupled with a widespread perception of gaming as solely entertainment rather than a potential vehicle for impact.





I see an industry with a lot of very young talent. But it is not organised yet and one of the biggest challenges is having the right education for the developers. I'm not talking about a three-month programme. If you really want to be a good programmer you need years of working and experience. And exactly the same in production and on the business side. There also needs to be entrepreneurship education, and helping companies build their companies strategic thinking. All young industries need this support.





Prof. Odile Limpach,Co-Founder: SpielFabrique
Germany

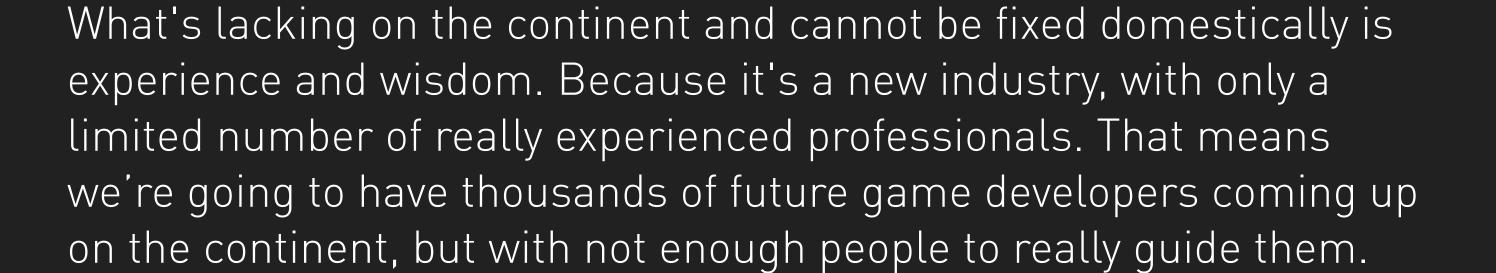




Founder, CEO: Usiku Games

Co-Founder: Pan African Gaming Group

Kenya







THE IMPACT GAMES VALUE CHAIN

The concept of the value chain emphasises a comprehensive, continent-wide approach to creating and distributing products and services that are deeply rooted in African culture, innovation, and ownership.

This model highlights the importance of leveraging local resources, talent, and markets to foster economic growth and sustainability within Africa.

Inspired by Africa

Made in Africa

Sold in Africa

Owned by Africa

Ideas and concepts based on the continent's rich cultural heritage, diverse ecosystems, and unique societal challenges

Production capacity that leverages local resources talent, skills and expertise

Market and trade regulations, demand creation and development of sustainable supply chains

Ownership of the businesses and intellectual property generated within the continent

CURRENT STATE



Recent efforts in the gaming industry have been dedicated to exploring and developing Africa-inspired concepts and ideas through short-term activities and programmes. However, these efforts often closely resemble existing games from more experienced global companies, leading to an imbalance between the supply of and demand for locally produced games, thus intensifying difficulties for market and industry growth.

	Problem	Efforts	Consequence
	Prioritising quantity over quality, focusing more on developing concepts only with no further execution. Underrepresentation of genuine African cultures, stories and diverse voices.	Once-off activities to generate Africa - inspired ideas and concepts.	Many concepts fail to materialise due to funding shortfalls or limited production capabilities, leading to the export of creative ideas overseas.
Made in Africa	Non-scalable production capacity, reliant on external funding. Deficiency in critical skills such as marketing and monetisation, as well as advanced game development skills.	Short-term and work-for-hire projects primarily requiring entry-level skills.	Talent extraction intensifies the need for external funding and up-skilling, leaving local monetisation models and production methods undeveloped to be effective in the local context.
Sold in Africa	Access barriers for users, including payment systems, technical limitations, and connectivity issues. Absence of market and demand for locally produced games.	Addressing infrastructure issues by partnering with overseas companies to promote and sell their games.	Further decline in demand for locally produced games as they struggle to compete with the offerings and quality from globally established studios.
Owned by Africa	Limited access to publishers and distributors, along with low levels of ownership and control over IP. Absence of effective economic models essential for profitability, customer acquisition, retention, and scaling.	Adopting well-known international IPs to develop games to be resented as locally produced.	Revenue flows overseas, leaving no sustainable income stream within the local industry for business viability.





Move down the value chain!

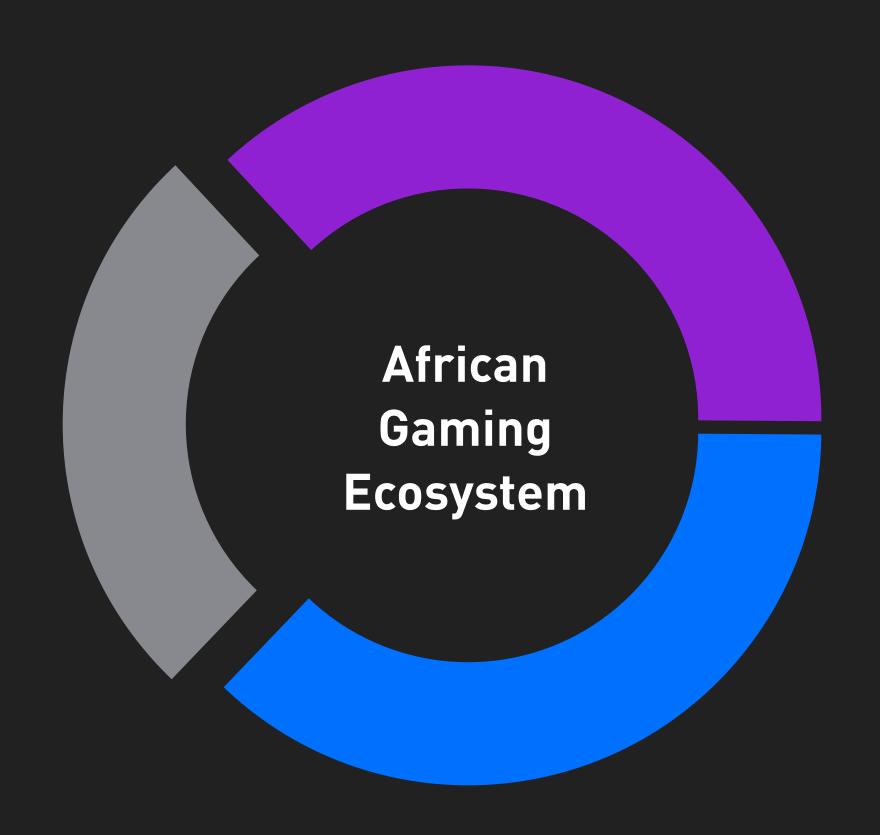
- Moving forward from ideation to production is essential because while generating Africa-inspired concepts is valuable, the current focus on short-term activities may not be enough to establish a distinct market presence.
- By progressing towards actual production, the African gaming industry can begin to offer distinct, locally-developed games, fostering a healthier market dynamic that encourages industry growth and nurtures local talent, ultimately leading to a more vibrant and self-sustaining gaming ecosystem.



Glenn Gillis, Chairperson: G4C Africa CEO: Sea Monster South Africa



PROBLEM: THE MISSING MIDDLE



- Big International Studios
- Middle-Size Studios
- Entry Level Game Creators

The primary barrier to progress in Africa's gaming value chain is the "missing middle", which reflects inadequate support for mid-sized studios' growth. This gap limits their competitive edge against global giants, who currently dominate the market, and restricts job opportunities for the rapidly growing entry-level talent pool.

These studios encounter significant obstacles, including low demand for locally produced games and a scarcity of long-term partnerships with international collaborators. The absence of government support mechanisms, like grants or loans, further restrict their ability to enhance game quality, pushing them towards work-for-hire arrangements that do not contribute to IP ownership or steady revenue generation.



RECOMMENDATIONS

FIXING THE VALUE CHAIN



The potential for innovation and local industry growth in Africa is clear, but the ecosystem is burdened by a shortfall in infrastructure, investment, and market access. **The focus must now shift towards establishing sustainable demand** to reconstruct the value chain. This direction is expected to organically reinforce various industry segments, facilitating widespread growth and development.

Objectives

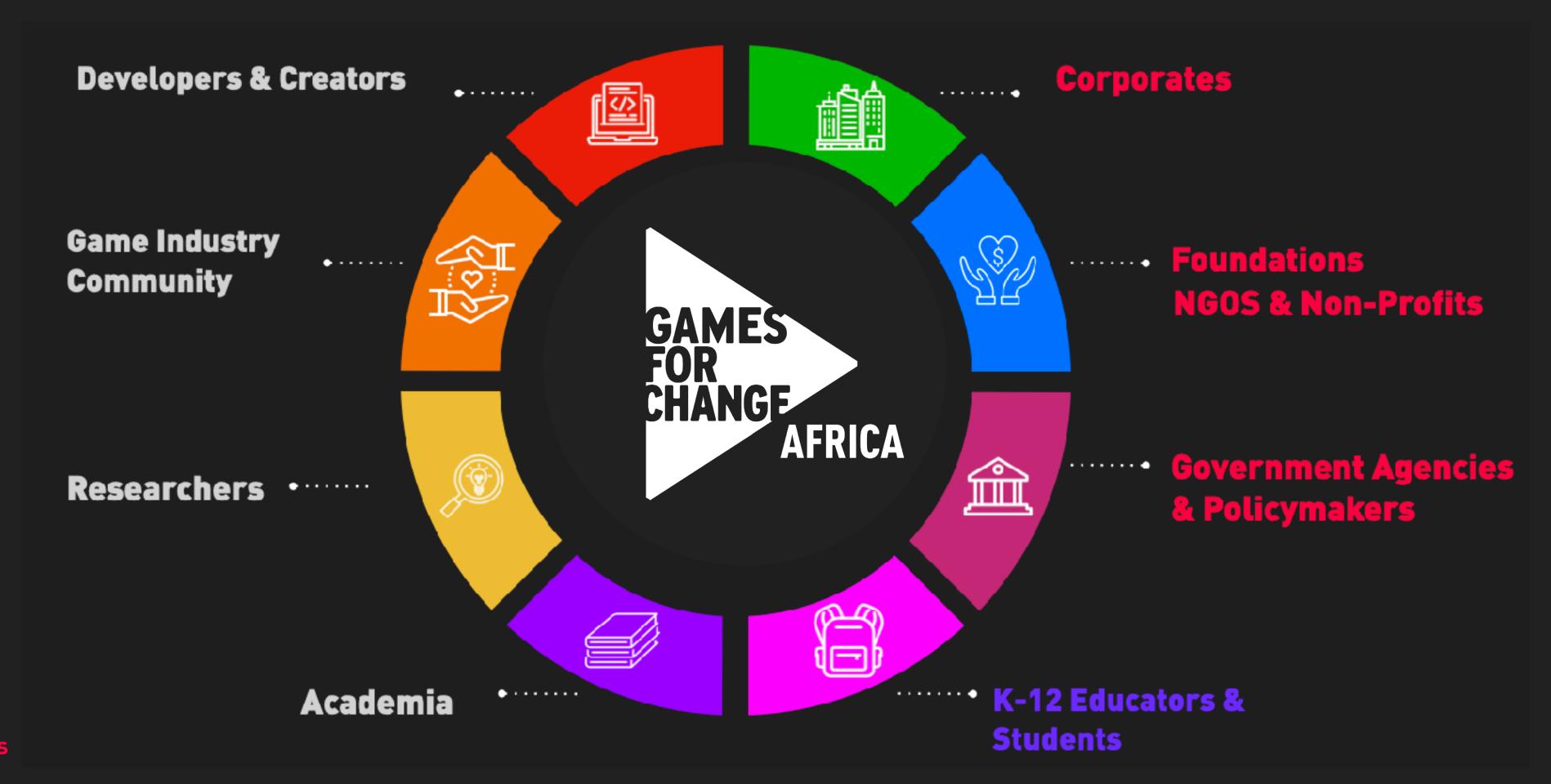
Guidelines

	Ubjectives	Guidetines
Inspired by Africa	 Authentic representation of African cultures and heritage in creative outputs Strategic use of local languages, art and environments Enhancement of diverse voices and narratives Tackling of stereotypes through innovative ways of expression 	What story? Use narratives that celebrate and educate about Africa's heritage. Whose story? Elevate the experiences and perspectives unique to African individuals and communities. Whose idea? Encourage innovation that originates from within the continent and resonates with genuine African values and real challenges.
Made in Africa	 Development of local production capacity to an industrial scale, securing job creation and sustainable revenue generation Retaining and up-skilling of local talent, including areas of advanced hard skills, production, business development, marketing, legal and regulatory compliance 	Who makes what? Highlight the contributions of local developers, studios, and creators who are actively shaping Africa's unique gaming identity. Where is it made? Focus on fostering a robust game development ecosystem within African economies to foster local production. How is it made? Promote quality and inclusive work conditions using innovative and locally tailored approaches, while championing practices that uplift the local industry.
Sold in Africa	 Preservation and sharing of IP Sustainable international collaborations Strong cross-continental partnerships 	Who owns what? Aim to maintain ownership of IP to ensure a continuous revenue stream. Who benefits? Pursue partnerships that are equitable and beneficial for all, avoiding exploitative agreements.
Owned by Africa	 Demand led strategy Robust business models and strategies suitable for local context Localised monetisation methods 	Who plays? Identify your target market, audience's demographics and preferences for targeted game development. What is played? Ensure your game reflects the "Inspired by and Made in Africa" ethos. Who pays? Adopt a business model that aligns with the preferences and capabilities of your target users, clients, and investors.

STAKEHOLDER MAP



Moving forward, it's crucial to empower stakeholders who play a pivotal role in generating demand, ensuring they have the tools and support necessary to enable the games industry to become robust and self-sustaining.



Supply sectors

Priority Sectors

Future Focus



FOR INDUSTRY STAKEHOLDERS

- Investors
- Corporates
- Government departments
- International organisations
- Academic institutions
- Foundations and non-profits



Build Awareness:

- Advocate for the integration of games into your sector
- Elevate African expertise within your sphere of influence
- Support the continents' participation in industry events

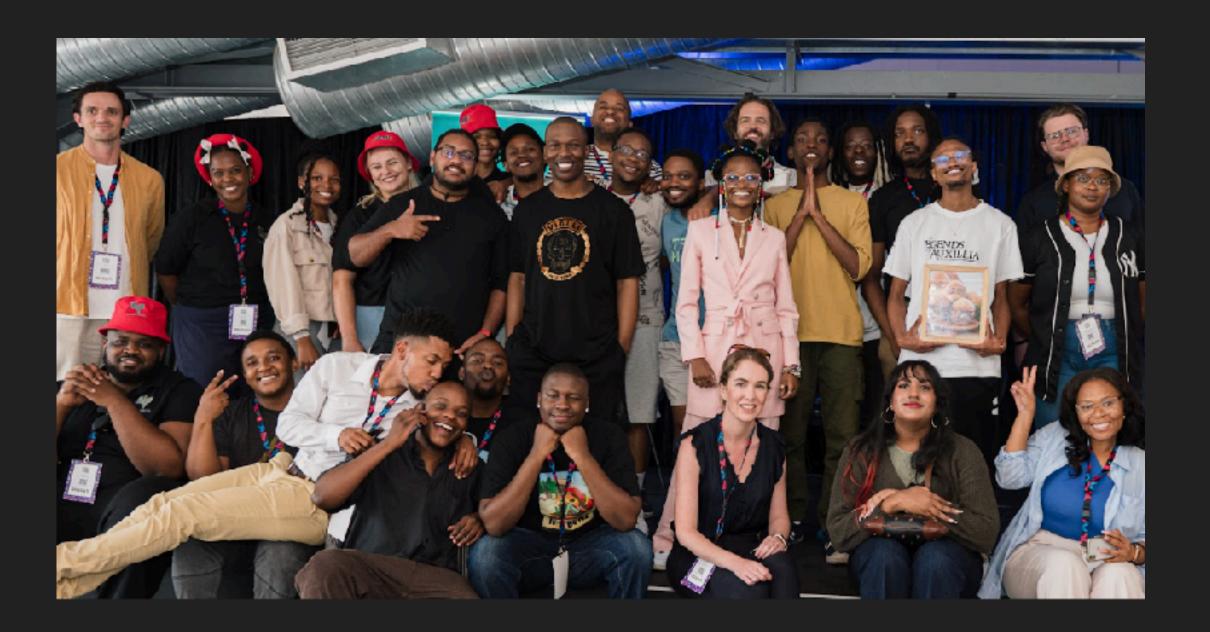
Take Action:

- Fund and and participate in the multi-stakeholder partnership projects that stimulate local production and IP development
- Facilitate long-term contracts and collaborations
- Invest in the entire game development value chain, focusing on creating demand
- Explore how games can be utilised for your organisation's outreach, training, marketing or community improvement efforts



FOR GAME CREATORS

- Producers
- Studio owners
- Developers
- Designers
- Creatives
- Intermediaries



Build Awareness:

- Educate clients, users and your network about the power of games to drive positive change
- Use social media channels and industry events to amplify the message and promote your work

Take Action:

- Gain a thorough understanding of your goals, market, audience, production and distribution before starting the creative process
- Aim to authentically represent African culture, heritage and the continent's rich traditions, stories, and values
- Approach a broader pool of stakeholders, including corporate investors and public sector entities for funding and collaborative production
- Push for fair partnerships and IP ownership to ensure mutual benefits and sustainable workflow
- Seek expertise in advanced production skills, business development, marketing, monetisation strategies, legal and financial policies





Tshireletso TshwenyaneProducer: Electric South
South Africa



We need to go out there and source the clients.

Hopefully who are big enough to create a ripple effect in terms of a financial injection.





G4C AFRICA STRATEGY

Generating Demand:

Guided by a demand-led strategy, we aim to raise the profile of impact games developed on the African continent and highlight the significant potential of the local gaming industry to foster partnerships and attract investment.

Transformation Through Games:

Leverage games and game design thinking as tools to change the approach to problem-solving and creative expression among youth, educators, public and private sector, both in Africa and globally.

Educate and empower stakeholders Foster discussions and actions on critical issues Facilitate ways to collaborate



G4C AFRICA PLAN OF ACTION 2024

In pursuit of our strategic objectives, we're launching an array of activities that merge the best of G4C Global's established initiatives with innovative programmes. These are thoughtfully designed to navigate and overcome the specific challenges inherent to the African context:

African Chapter Activities

Grow and strengthen the African gaming community by leveraging social media platforms. Engage and empower the community by participating in networking events.

Annual G4C Africa Festival

Foster impactful discussions and broadcast critical messages. Highlight standout games and practices within Africa, inspiring excellence and collective action in achieve our goals. the gaming community.

Satellite **Events**

Boost visibility for Africa's impact gaming scene during local and international industry events. Pursue strategic partnerships to

G4C Africa Learn Programmes

Empower youth and educators to think differently. Enable them to explore innovative ways to teach, learn, create and connect via practical game design experiences.

Co-production **Initiatives**

Facilitate collaborations that open pathways for co-production between local and global partners on sustainable projects with a 3 to 5-year horizon.

For more information about participation in our programmes, please reach out to the G4C Africa team.

CALLTOACTION

Rethink Possibilities

We invite you to view gaming in a new light. Discover how games can meet your needs or tackle ongoing challenges.

Think Bigger

Join us in thinking beyond the conventional. Build our community and partnerships - together, we can scale our efforts and ensure sustainability.

Move Beyond Ideas

It's time to turn your thoughts into action. **Engage** with our community, make an introduction, send an email, make a phone call, allocate funds. Every action counts, and your small step can create a wave of change.





Partner with us to educate, inspire, and foster meaningful change in Africa and beyond.

Get involved by reaching out to:

Tatiana Skliarenko, Executive Producer // tatiana@g4cafrica.org



APPENDIX



GAME CHANGERS GATHERING

This session was a standout and central feature of the G4C Africa Festival 2023, symbolising a crucial step in devising innovative solutions and fostering meaningful partnerships aimed at raising awareness of and driving action towards addressing the Sustainable Development Goals.

In a dynamic 3-hour workshop, specialists from varied disciplines converged and collaborated to convert Africa's challenges into opportunities via games and game-based thinking. Focus was centred on four strategic areas: Education and Cultural Heritage, Inclusive Economies, Environmental Awareness, Well-being and Civic Unity.

The Game Changers Gathering serves as a prime example of putting our strategy into practice.







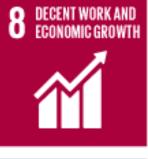






































46 9 19
Participants Game Studios Organisations



PROJECTS / GAME CONCEPTS



10 REDUCED INEQUALITIES

Play to Learn for Africa

Freeing education from classrooms

"Play to Learn for Africa" aims to revolutionise education with its engaging gamified platform, breaking away from conventional classroom constraints. It blends play in natural environments with cutting-edge virtual reality, making learning an adventure.

Anchored in the rich tapestry of local narratives, wisdom from teachers, elders, and communities, it transforms education into a shared, lifelong journey. The curriculum, deeply rooted in relevance and relatability, seamlessly connects academic learning with home life, embodying a true bridge between traditional knowledge and modern educational needs.





Project Thrive

Rewarding sustainable behaviours and choices

"Project Thrive" pioneers a groundbreaking environmental game that motivates young Africans towards eco-friendly behaviour. By blending gamification, blockchain, and communal engagement, it transforms sustainability into an individual, achievable, and gratifying mission.

Central to "Project Thrive" is its innovative, blockchain-enabled, Al-driven system, which encourages eco-conscious actions. It cleverly evaluates choices in areas like diet, energy use, transport, and waste control, rewarding users based on their sustainable practices. This approach not only educates but also offers tangible incentives for preserving the environment.



Democracy at Play

Civic engagement through technology

"Democracy At Play" offers an innovative approach to enhancing civic engagement using advanced AR and AI technologies. By navigating through historical events that have shaped their surroundings, users gain insights into the consequences of future choices.



This game empowers individuals to participate actively in policy dialogues and decision-making processes, providing an immersive and interactive platform for civic learning. Additionally, its application extends to voter education and the fight against disinformation, making it a versatile tool for strengthening democratic participation.

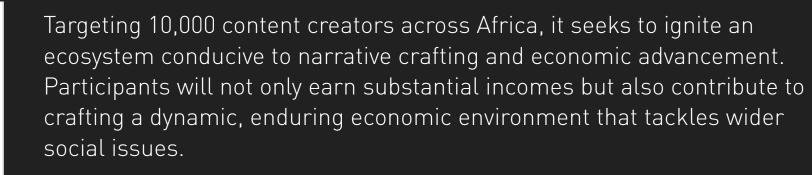


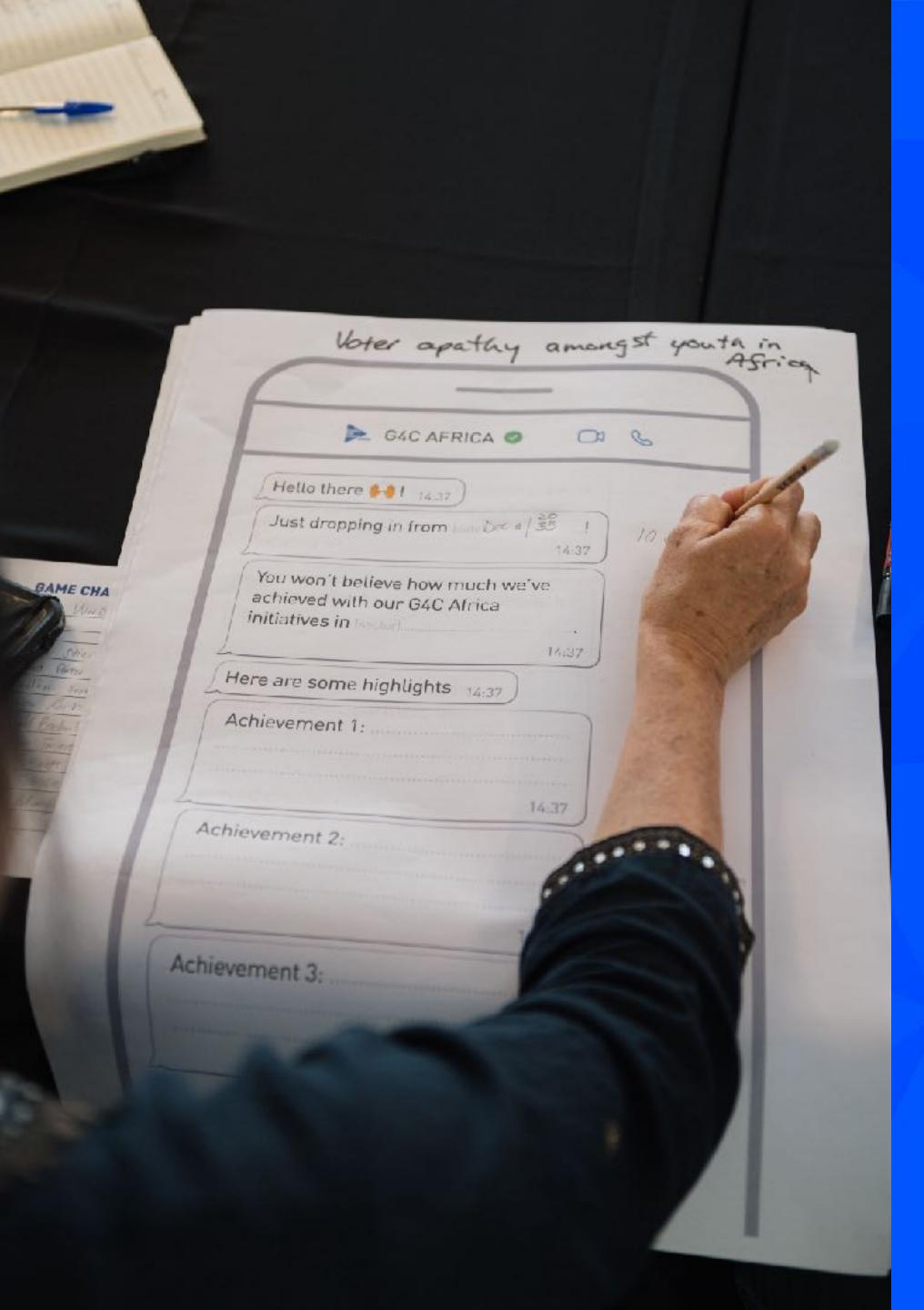


Project Participation

Pioneering economic inclusion through creativity

"Project Participation" represents a revolutionary economic framework designed to empower people and communities through the utilisation of their creative skills.







SESSION FEEDBACK

"It was coherent, it was cohesive, it was well organised and it was structured and I thought it was well paced."

"The Game Changers session where there were invited guests from multiple disciplines was an exemplary session - really cutting edge, showing people how to work in a collective way that can bring diverse opinions and open discussion to solve problems. It was the best of games and the best of change. It was really, really fantastic. I can tell you that I felt very joyful working on it. I thought that everyone engaged in an honest and authentic way."

"Very well organised. I think that's what the festival needs. Before you go, you need to know what is expected from you and what you can expect from the festival. I think that was really good and very well managed. And I was very impressed by the attendees and having big companies present."



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Photography: Moegammad T Abrahams

GAMES FOR CHANGE AFRICA

gamesforchangeafrica.org 2024

