

# The Emerging Gaming Sector in Zimbabwe: Obstacles and Opportunities for Revenue Generation

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## ABSTRACT

This article discusses gaming as a potential financing mechanism. It explores the opportunities presented by the emerging gaming sector in addressing Zimbabwe's development financing woes. The rise of the gaming industry is a global phenomenon propelled by the Fourth Industrial Revolution (4IR) and Artificial Intelligence (AI) both of which define the current period as a Digital Era. This digital era is characterized by technological developments such as Internet of Things, nanotechnologies, robotics, biotechnologies, blockchain technologies, 5 generation technologies, autonomous vehicles, AI and numerous others. In this new and still emerging age, daily life including work, business, shopping, learning, and leisure, has become inextricably linked to digital technologies. What is more relevant for the present analysis is the increasing penetration of mobile devices, expanding internet connectivity, and rising access to digital platforms. The article also explores several obstacles including regulatory constraints, lack of investor awareness, and inadequate technological infrastructure as major barriers to the growth of the gaming industry in Zimbabwe. Besides exploring the obstacles and opportunities, the article also proposes various ways that can be deployed in order to scale-out and scale-up the gaming industry in Zimbabwe. The proposed measures could possibly position the country as a competitive player in the regional and global gaming market.

**Keywords:** Fourth Industrial Revolution, Gaming industry, Revenue diversification, Online gaming, Zimbabwe.

## INTRODUCTION

This article privileges online gaming as an innovative financing mechanism. It explores the opportunities presented by the emerging gaming sector in addressing Zimbabwe's

development financing woes. The rise of the gaming industry is a global phenomenon propelled by the Fourth Industrial Revolution (4IR) and Artificial Intelligence (AI) both of which define the current period as a Digital Era. This digital era is characterized by technological developments such as Internet of Things, nanotechnologies, robotics, biotechnologies, blockchain technologies, 5 generation technologies, autonomous vehicles, AI and many more. In this new and still emerging age, daily life including work, business, shopping, learning, and leisure, has become inextricably linked to digital technologies. What is more relevant for the present analysis is the increasing penetration of mobile devices, expanding internet connectivity, and rising access to digital platforms.

Zimbabwe, like all other countries spanning the globe, is well placed to benefit from the digital technologies. With its struggling economy characterised by fiscal deficits, unemployment, and currency instability among others, the country can benefit from the gaming sector which has huge potential for revenue generation. It will be argued that the emergence of the vibrant online gaming industry presents an opportunity for the cash-strapped government of Zimbabwe to boost its revenue generation through taxation, licensing and investment in emerging gaming platforms. In this way, the gaming industry presents a huge potential for revenue diversification in Zimbabwe.

While acknowledging the opportunities presented by the emerging gaming business, the article also explores some of the key obstacles that will need to be addressed if online gaming is to significantly contribute towards revenue generation extending beyond private businesses, but also stretching beyond fiscal purposes. Some of the discussed challenges include lack of enabling regulatory and institutional frameworks, poor internet connectivity, limited gaming infrastructure and power deficits in the country (Moyo forthcoming; Mutambiranwa, 2021; Chirume, 2023; Potraz, 2023). Apart from exploring the obstacles and opportunities, the article also proposes various ways that can be deployed in order to scale-out and scale-up the gaming industry in Zimbabwe. The article is primarily based on qualitative analysis of academic journals, industry reports and policy documents. The review of these documents provided insights into the regulatory landscape, the nature and scope of the on-line gaming industry in Zimbabwe.

### **CONTEXTUAL AND CONCEPTUAL ISSUES**

To begin with, the gaming industry encompasses activities that are related to the creation, distribution and monetisation of games, including digital video games, traditional casino gaming, sports betting and emerging fields such as e-sports and virtual reality gaming. It operates at the intersection of technology, entertainment and commerce (Newzoo, 2021). Viewed from this perspective, the gaming industry is a very broad sector. The discussion contained in this article, however, confines itself to a narrow aspect of the gaming industry, namely 'on-line gaming'. As previously mentioned, the phenomenal rise of on-line gaming is organically linked to the Fourth Industrial Revolution, which is characterised by increased use of mobile phones and access to the internet. The 4IR is largely driven by the Silicon Valley-based Big Tech corporations such as Google, Apple, Facebook, Amazon, and Microsoft (GAFAM) as well as China-based tech giants including Alibaba, Baidu, Huawei, Tencent and ZTE (Moyo, forthcoming). Apparently, all these tech companies have had their digital footprint expanded all over the world including Africa in general, and Zimbabwe in particular. In addition, there are

several digital Start-ups that have emerged across the continent. These have become the key drivers of the online gaming industry in African countries including Kenya, Nigeria and South Africa as well as Zimbabwe where the industry is still in its infancy.

There is hardly any doubt that the proliferation of iPhones, iPads, iPods and smartphones coupled with “free internet” offered by Facebook’s Free Basics and Google Station in countries like Nigeria and South Africa have improved internet connectivity, hence, made gaming more accessible to a broader audience, especially the youth. It should be noted from the outset that, mobile gaming, which accounted for 50 percent of global gaming revenues in 2022, has become the dominant platform for gaming particularly in the Global South (Newzoo, 2022). As a matter of fact, countries in Africa, Asia and Latin America are witnessing a surge in mobile gaming adoption, creating opportunities for increased revenue generation for these economies. It is instructive to note that in recent years, the eruption of the COVID-19 pandemic acted as a catalyst for the phenomenal rise of the online gaming sector in Africa and elsewhere in the world. During the COVID-19 lockdown era, a significant portion of the population resorted to online games as a means of entertainment. Thus, in a short period of time the gaming industry has grown from relative obscurity to a significant sector with the potential to contribute to the economies of the Global South including Zimbabwe.

What is particularly relevant for this discussion is that the gaming has evolved as a multi-billion-dollar global industry, driving technological innovation, creating employment opportunities and generating government revenue (Newzoo, 2021; Statista, 2023). For example, in 2023, the global gaming market was valued at approximately US\$200 billion with projections indicating it will surpass US\$300 billion (Statista, 2023). Today, the gaming industry contributes significantly to Gross Domestic Product (GDP), with nations such as the United States of America and China as well as South Korea leading the market. These countries are currently generating billions of dollars annually through taxes and licensing fees associated with gaming activities (PwC, 2022; Statista, 2023). Indeed, governments worldwide are leveraging the gaming industry as a source of public revenue.

Notwithstanding the recent surge in online gaming in Africa, it should be noted that the industry is still at its infancy. Its potential remains underexplored, its infrastructure is underdeveloped, its regulatory framework is inadequate and investment in it is yet to be ‘fully-charged’. However, the gaming sector in Africa is expected to surpass US\$1 billion in annual revenues by 2027 (Siele, 2024). Available evidence indicates that countries such as Ethiopia, Ghana, Kenya, Nigeria and South Africa are emerging as pacesetters in the development of the gaming industry in Africa. These countries have relatively more advanced digital infrastructures, larger gamer bases, and expanding investments in digital entertainment compared to the rest of the countries on the continent (Onyango, 2022).

In line with the continental trends, the gaming industry in Zimbabwe is poised to grow rapidly in the coming years. The industry, including online gaming and e-sports, is projected to grow significantly, with revenues expected to surpass US\$60 million annually in the next few years (Statista, 2024). With its struggling economy, characterised by inequalities, fiscal deficits, unemployment and currency instability, it is prudent for the Government of Zimbabwe to explore the gaming sector as a potential source of revenue generation through taxation and

licensing fees and digital transactions. At the same time, the youth can benefit from the opportunities provided by competitive gaming, content creation, and software development, and fostering skills relevant to the digital economy among others (Munyoro and Mavhura, 2022).

### **POTENTIAL FOR ONLINE GAMING IN ZIMBABWE**

While it is still in its infancy, the gaming industry in Zimbabwe has the potential to grow into a sizeable market and likely contribute to the domestic capital mobilisation in the country. As previously explained, in recent years Zimbabwe has witnessed a rise in gaming fueled by platforms that integrate mobile payment systems like EcoCash. The integration of mobile money with gaming platforms has enabled smoother transactions, thereby enhancing user experience and convenience for gaming activities. At the same time, virtual casinos and online poker games are gaining popularity, especially among young adults seeking digital entertainment. These platforms are largely unregulated, highlighting an opportunity for formalization and revenue generation through taxation. Hence, in his 2025 National Budget Statement, the Minister of Finance, Economic Development and Investment Promotion, Professor Mthuli Ncube, acknowledged the growing popularity of sports betting as reflected in the proliferation of sports betting shops across the country. The Minister imposed a 10 percent withholding tax on gross winnings from sports betting (MoFED, 2024). The tax aims to formalize this revenue stream and ensure that participation in the betting ecosystem contributes to public finances.

The major opportunity for resource mobilisation lies in the surge of mobile gaming. As is the case with other African countries including Ethiopia, Ghana, Kenya and Nigeria, gaming on mobile devices is getting more popular in Zimbabwe. Due to the proliferation of smartphones, increased access to, and use of the internet, as well as the advent of Starlink in Zimbabwe, the growth of mobile gaming has been catalyzed in the country. Information at hand indicates that mobile gaming alone was expected to generate revenue of US\$38.89m by end of 2024 (Statista Market Insights, 2024). This was based on the projection of the user penetration rate of 15.9 percent in 2024 and 18.7 percent by 2027. The average revenue per user in Zimbabwe's mobile games market was projected to amount to US\$15.48 in 2024 (Statista Market Insights, 2024).

The youthful population also presents a huge opportunity for the gaming industry for Zimbabwe. To be clear, a significant portion of Zimbabwe's population is under the age of 35, and many of these individuals are keen on gaming. Youth interest is particularly high in mobile games, which are affordable and accessible. Betway, a popular betting platform, reported a 30 percent increase in Zimbabwean users in 2022, largely attributed to ease of access through mobile phones and economic hardships that drive people to seek quick income sources (Betway, 2022).

The potential of the gaming industry is based on the increasing availability of mobile devices, improved internet access, and the emergence of online gaming platforms. According to the Zimbabwe Lotteries and Gaming Board (2022), the gaming industry generated over ZWL\$1 billion (US\$ 1,544 million) in tax revenue in 2022, a 30 percent increase from the previous year. Several factors have contributed to the growth of Zimbabwe's gaming industry. Among these factors is increased internet penetration. The rise in mobile connectivity and affordable data

packages have facilitated greater access to online gaming, betting and social gaming platforms (Dube, 2023). Mobile platforms now account for nearly 80 percent of all internet traffic in Zimbabwe, making them crucial for gaming companies to reach new users (Zimstat, 2022). Digital payment systems, particularly mobile money services like EcoCash, have also facilitated the rise of online gaming by easing the process for players to make transactions.

Lastly, while the number of skilled game developers is limited in Zimbabwe, it is interesting to note that game developers are embarking on a new era of producing games that reflect local culture, traditions and history. This trend is perceived as an opportunity to diversify the industry while promoting national identity in global markets. For instance, games like Simba Go and Gombwe Runner depict Zimbabwean folklore and landscapes, appealing to local players (TechZim, 2023). In essence, games with African narratives will provide unique and rich experiences for players, preserving indigenous knowledge, languages and stories for future generations.

### **REGULATORY AND INSTITUTIONAL FRAMEWORKS**

In order to realize the opportunities that are offered by the gaming sector, it is critical for Zimbabwe to have a comprehensive legal, regulatory and institutional framework. In a broader context, the gaming sector in the country is currently suffering from weak regulations frameworks. This problem is not peculiar to Zimbabwe. Campbell and Smith (2020) contend that, many governments face challenges in regulating the gaming sector effectively. However, more and more African countries have taken steps to regulate the gaming industry, balancing economic benefits with societal protection. For example, South Africa has a decentralized approach, with each province having its own regulatory authority, allowing tailored responses to local conditions (Tyawa, 2023). Carnelley (2023) has noted that the regulatory framework enables South Africa to tap into significant tax revenues.

As previously stated, the growth of the gaming sector in Zimbabwe is adversely hampered by lack of proper regulatory instruments. This lack of appropriate regulatory instruments tends to expose gamers to risks such as fraud, data breaches and exploitation. Consumer protection in the gaming sector includes ensuring transparency, fair play and safeguarding user data, however, current legislation in Zimbabwe falls short at addressing these issues comprehensively (Makoni and Dube, 2022). Meanwhile, the lack of regulatory instruments deprives the country of effectively monitoring the sector for revenue purposes. Currently, there are three major pieces of legislation that govern the gaming sector in Zimbabwe. *First*, the Betting and Totalizator Control Act (Chapter 10:02) governs the operation of betting facilities, ensuring compliance with licensing and taxation requirements. *Second*, the Lotteries and Gaming Act (Chapter 10:26) which regulates lotteries, gaming and casino operations. *Third*, the Criminal law (Codification and Reform Act (Chapter 9:23) that prohibits unauthorized gambling activities. These laws provide the basic structure for gaming regulation, including licensing, monitoring and penalties for illegal activities. However, all these pieces of legislation do not adequately cover the emerging online gaming sector. Moreover, Zimbabwe's tax regime is not tailored to modern online gaming, potentially discouraging formalization and investment (Chirume, 2020). In short, Zimbabwe suffers from an online gaming regulatory void thereby leaving many operators untaxed.

On the other hand, the institutional framework of the gaming industry in Zimbabwe comprises various regulatory bodies, ministries and local authorities responsible for overseeing gaming operations, enforcing compliance and promoting responsible gaming practices. Key institutions governing the industry include the Gaming and Lotteries Control Board (GLCB), the Ministry of Home Affairs and Cultural Heritage, Local Authorities and the Zimbabwe Revenue Authority. The Gaming and Lotteries Board is the primary regulatory authority responsible for overseeing the licensing, monitoring and revenue collection of gaming operations (Chirume, 2020). The board ensures that they are in compliance with the Lotteries and Gaming Act (Chapter 10:26) and addresses illegal gaming activities. The board is committed to using funds from the gaming industry to support social and economic development in various parts of Zimbabwe. The Zimbabwe Lotteries Board is currently working on the Pupu Clinic project in Lupane, Matabeleland North Province (Chingozha, 2023). The Pupu project was commissioned on the 21st of March 2024 by His Excellency, President of the Republic of Zimbabwe, Emmerson Dambudzo Mnangagwa (Ministry of Information and Broadcasting Services, 2024). Additionally, the board has drilled a solarized borehole at the Pupu Monument in the same area (Chingozha, 2023). However, challenges such as limited funding and resources undermine the Board's capacity to enforce regulations (Munyoro and Mavhura, 2022). The lack of expertise to handle emerging trends, such as online platforms, hinders its effectiveness (Mutambiranwa, 2021).

The Ministry of Home Affairs and Cultural Heritage oversees the policy framework governing the gaming industry and works closely with the Gaming and Lotteries Control Board to develop and implement gaming-related policies. Regrettably, policies developed by the ministry are often reactive rather than proactive, failing to address rapid technological advancements in the gaming industry (Munyoro and Mavhura, 2022). Simultaneously, there is poor coordination between the ministry and other stakeholders, which creates inefficiencies in the gaming sector. Smooth coordination between the central and local tiers of government is critical since Local Authorities are tasked with enforcing gaming regulations within their jurisdictions, including monitoring unlicensed operators and ensuring adherence to local laws (Mutambiranwa, 2021).

Overall, the institutional framework is not appropriate for the emerging online gaming sector which is the unit of analysis for this discussion. As already explained, the existing regulatory frameworks and outdated laws governing gambling and gaming do not adequately address the dynamics of mobile gaming and online platforms. Current regulations focus mainly on physical casinos and betting shops, leaving digital gaming largely unregulated (Chirume, 2023). In addition, multiple gaming operators function informally, leading to revenue leakages and unregulated practices. This undermines the government's ability to leverage the industry for public finance as a number of operators evade licensing and taxation.

### **OBSTACLES MILITATING AGAINST THE GAMING SECTOR IN ZIMBABWE**

Despite the potential of the gaming industry to boost fiscal revenues, there are a number of obstacles that significantly hinder the growth of this sector in Zimbabwe. Besides the regulatory and institutional barriers discussed above, as well as in the following sections, the gaming sector in Zimbabwe is affected by inadequate internet infrastructure, lack of internet access or limited internet penetration, slow connectivity speeds, unreliable (and in some places unavailable) electricity, high cost of data bundles, limited access to payment systems, as well as

high costs of gaming hardware and software including the affordability of devices such as consoles and high-end smartphones (Mutambiranwa, 2021; Chirume, 2023; Potraz, 2023). There is also lack of support from the government and policy makers. These challenges are exacerbated by Zimbabwe's difficult economic situation, which is characterized by high levels of unemployment, poverty, hyper inflation, and low disposable incomes among others. These challenges affect consumer spending on non-essential services like gaming.

Furthermore, the development of online gaming industry is also affected by lack of funding. The cost of developing games for the Zimbabwean market can be prohibitively high due to the lack of an established gaming industry infrastructure. This makes it challenging for gaming professionals to secure external funding for their projects, making sustainability a significant hurdle. Consequently, local studios are unable to secure funding, attract skilled professionals, and protect their intellectual property. This is largely because gaming is viewed as incredibly risky to invest in due to its current failure in predicting what will be successful among consumers. This lack of access to capital hinders the growth of local developers. In particular, lack of funding results in limited local content in game development. It is worth noting that although the gaming market is growing rapidly, the majority of popular games are created by international companies. Over and above this, Zimbabwe also lacks sufficient training institutions for game development. This tends to limit the country's capacity to innovate and compete in global markets. In this regard, institutionalization of the sector would instill ethics and curb some of these ills.

Intermediated Money Transfer Tax (IMTT), while intended to boost government revenue, has had unintended consequences on electronic transactions. Initially set at 2 percent, the Intermediated Money Transfer Tax (IMTT) was later increased to 4 percent for foreign currency transactions before being reduced to 1 percent in 2023 (DailyNews, 2023). Despite these adjustments, the tax has been criticized for discouraging the use of formal financial channels, as it increases the cost of electronic transactions, leading many individuals and businesses to prefer cash transactions to circumvent the tax (The Zimbabwe Independent, 2024). The shift towards cash-based transactions poses a particular challenge for the gaming industry, which relies heavily on digital payment systems for the purchase of games. The increased transaction costs due to the Intermediated Money Transfer Tax (IMTT) discourage consumers from using mobile money platforms, thereby limiting the market for digital gaming products. Furthermore, the preference for cash transactions can lead to revenue leakages, complicating efforts to formalize and grow the gaming sector (The Zimbabwe Independent, 2024).

There are also social problems associated with the gaming industry. Without proper regulation and public awareness, excessive gaming can result in negative social and psychological impacts including addiction and financial instability among youth. Mavedzenge (2019) has noted that approximately 65 percent of active gamblers are between the ages of 18 and 35. A study by Gandidzanwa and Sibanda (2020) found that 40 percent of young adults in urban areas engage in some form of gambling, often as a means of coping with economic difficulties.

Overall, it must be noted that the gaming industry tends to benefit the tech giants, digital platform owners who sell their software and hardware, and those collecting data from their

platforms for advertising purposes. At the same time, gaming is a non-productive sector of the economy that woos the youth who use the money sent to them by their relatives living in the diaspora. Thus, while gaming is touted as an innovative financing mechanism in Zimbabwe and other African countries, in reality it benefits the global capitalists more than it helps the national economies. This view should not be viewed as representing anti-gaming business, but rather, a critique which reveals the darker side of the sector.

### **FUTURE OF THE GAMING INDUSTRY IN ZIMBABWE**

Despite the obstacles highlighted above, the gaming industry in Zimbabwe is burgeoning and its future looks promising. However, a better future depends on strategic interventions that address existing obstacles while capitalizing on the sector's potential. Key enablers and strategies for navigating obstacles and harnessing opportunities are hinged on accessibility, skills development, and above all, an enabling regulatory framework. Thus, Zimbabwe has a large potential market for gaming, and with the right strategies, the government can increase its revenue streams. However, a few things need to happen for Zimbabwe to scale-up and scale out its gaming industry.

The first one is to improve accessibility to affordable broadband. This requires enhancing present infrastructure to address internet connectivity. Added to this, is the need for reliable power supply. Stabilizing Zimbabwe's energy infrastructure to ensure consistent electricity will alleviate disruptions that hinder gaming operations. Also, providing tax breaks and grants to startups in game development can stimulate local content creation, boosting the industry's cultural relevance (Mutambiranwa, 2021). This will encourage local production, lower costs and make gaming more accessible to the broader population. Similarly, the government should explore the possibility of partnering with universities in skills development programs, courses in game design, and programming as well as digital animation.

Private organizations such as the Zimbabwe Game Developers Association (ZIGDA), are also working to promote local game development and encourage talent through workshops, competitions and hackathons (ZIGDA, 2023). The government's national Information and Communication Technologies (ICT) Policy, which emphasizes digital skills training and technology adoption, has laid a foundation for potential growth in digital sectors, including gaming (Ministry of ICT, 2022). The policy aims to improve digital literacy across the country, especially among the youth, thereby creating a talent pool with the skills needed for game development. With increasing youth interest, potential foreign investment and the development of more affordable technologies, Zimbabwe's gaming industry holds promise for the future. Moreover, as local developers continue to gain expertise, there is an opportunity for Zimbabwean-made games to find success on a global scale, especially if they incorporate unique cultural elements which distinguish them from mainstream games (TechZim, 2023).

Lastly, collaborating with global gaming firms can introduce advanced technologies and practices to the local industry (Chirume, 2020). This, however, also requires the attraction of investors, with Foreign Direct Investment (FDI) being able to fund state-of-the-art gaming facilities, e-sports tournaments and technology hubs. A stable regulatory environment and improved infrastructure can attract local and international investors. Thus, the gaming industry requires updated policies to reflect modern trends such as online gaming, mobile



platforms and e-sports. Clear taxation policies, licensing and enforcement mechanisms can formalize the sector, reducing revenue leakage and attracting foreign investment (Munyoro and Mavhura, 2022).

## CONCLUSION

In summation, the gaming industry in Zimbabwe holds significant untapped financial potential. Despite the challenges of limited infrastructure, high data costs and minimal regulatory support, the sector's growth is driven by an enthusiastic youth population, increasing mobile and internet penetration and emerging local development talent. To fully leverage this potential, Zimbabwe must focus on fostering a supportive ecosystem for game developers, implementing policies that reduce barriers to entry, and encourage both local and international investment. Through building a foundation for digital skills and providing financial incentives, Zimbabwe can transform gaming into a viable sector that contributes to economic diversification, a source of income for the government, creates jobs, and enhances digital literacy. The country's unique cultural narratives and stories also provide a strong foundation for games that can appeal to both local and global audiences, positioning Zimbabwe as a growing hub for Africa-focused gaming content. Leveraging the positive potentials of the gaming industry can outweigh the current limiting revenue challenges facing the country.

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