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RESEARCH ARTICLE

INSTITUTIONAL BARRIERS AND CONSUMER MOTIVATIONS IN THE AIRING OF LOCAL ANIMATIONS ON FREE-TO-AIR PLATFORMS IN KENYA: A QUALITATIVE STUDY OF YOUTH ENGAGEMENT AND MEDIA PRACTITIONERS' PERCEPTIONS

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ABSTRACT

This study examined consumer motivations affecting the airing and consumption of local animation in Kenya, focusing on youth audiences aged 18–35. Despite the growth of the local animation industry, limited research had been conducted on audience preferences, gratifications, and the factors influencing the broadcast and reception of Kenyan animations. Guided by the Uses and Gratifications Theory, the research adopted a descriptive design, collecting primary data through focus group discussions and key informant interviews with consumers, media house programming officers, and animation producers. Secondary data included policy documents and industry reports. Findings revealed that while local animations partially fulfilled cognitive and personal integrative gratifications, they largely failed to meet emotional, social, and entertainment needs. Key barriers identified included technical limitations, inconsistent programming, weak promotion, and limited audience research. Policy and regulatory frameworks were found to inadequately support the visibility, distribution, and development of local animation. The study concluded that enhancing production capacity, strategic scheduling, and targeted audience engagement was critical for fulfilling youth viewing motivations and strengthening the local animation industry. Key recommendations included: establishing dedicated animation slots and improving marketing within broadcasters; providing funding incentives, clearer regulations, and capacity-building through government agencies; encouraging producers to prioritise strong narratives, gradual technical improvement, and active youth engagement; and enhancing training institution curricula, industry linkages, and short professional courses. Overall, the study provides critical insights into how consumer motivations, institutional practices, and policy frameworks interact to shape the visibility and consumption of local animation in Kenya.

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INTRODUCTION

In Africa, animation remains largely linked to children's programming and advertising (Azi, 2012). In Kenya, early visibility came through 1990s commercial advertising, later popularised by locally themed campaigns such as the *Faiba 3D series* (Nzekwe, 2019). Despite improvements in technology and creative skill, local animation has received limited broadcast support. Kidenda (2010) found that weekly children's schedules on Kenyan television contained no local animation, and subsequent studies highlight continued reliance on foreign content, raising concerns about cultural representation (Kidenda, 2018, Vikiru, 2013). The 2015 digital migration expanded free-to-air (FTA) channels and increased demand for local content, although structural barriers persist. Media houses often prioritise content perceived as

commercially viable, which places local animation at a disadvantage due to assumptions about cost and profitability (King'ara, 2010). Nonetheless, emerging local productions, such as the works of Michael Muthiga, demonstrate strong audience engagement when cultural relevance and humour are incorporated. However, foreign animation continues to dominate mainstream broadcasting. Kenyan youth aged 18 to 35 increasingly consume foreign animations through satellite and streaming platforms, while the Communication Authority requirement of at least 40 percent local content rarely benefits animation (CAK, 2019; CAK, 2024). Audience research remains limited, and youth preferences for animated content are often overlooked despite FTA television being the most accessible platform for many households (CAK, 2024). Further, animators report that broadcasters continue to classify

animation primarily as children’s content, which restricts airtime and reduces visibility for youth oriented and mature thematic productions (Masibo, 2019). The Uses and Gratifications Theory provides a relevant framework for understanding these dynamics. It conceptualises audiences as active consumers who select media to satisfy personal needs (Katz, Blumler and Gurevitch, 1974). In a media environment where youth can access both local and international animation, understanding motivations such as entertainment, identity affirmation, and cultural relevance is essential for effective programming decisions (Ruggiero, 2000, Meng and Yu, 2019). Kenyan broadcasting is regulated by the Communications Authority through the Programming Code for Broadcasting Services in Kenya, 4th Edition, 2024. The Code offers an expanded definition of local content that includes animation and specifies requirements for Kenyan creative involvement in writing, directing, editing, voice performance, and animation. Despite this, broadcasters frequently classify animation as children’s material, which limits scheduling within the watershed period and reduces accessibility for young adult audiences who form a significant portion of animation consumers (Masibo, 2019; Kidenda, 2010).

These developments highlight persistent gaps in programming, policy interpretation, audience research, and production support. This study therefore examines the motivations influencing the consumption and airing of local animation on FTA platforms in Kenya, with a focus on aligning audience gratifications, institutional decisions, and the broader broadcast environment. Despite notable progress in local animation production, Kenyan free-to-air (FTA) broadcasters continue to underrepresent homegrown animated content. Local animations are often confined to advertising, educational campaigns, or online platforms, rarely appearing in prime-time entertainment schedules. Meanwhile, Kenyan youth (18–35), the largest and most active media-consuming demographic; increasingly engaged with foreign animation on satellite and streaming platforms such as Netflix, Toonami, and YouTube. Existing research highlight two major shortcomings. First, most studies concentrated on children’s exposure to cartoons (Kidenda, 2010, 2018; Ochieng’, 2013), leaving the motivations and gratifications of youth audiences underexplored. Second, while institutional challenges such as high production costs, weak policy enforcement, and broadcaster risk aversion were documented (Ndemo & Weiss, 2017; Muthee, 2022), there was little inquiry into how FTA media houses actually perceived and made programming decisions regarding local animation. Importantly, very few studies integrated these two dimensions, consumer motivations and institutional barriers; to explain the continued marginalization of local animation on mainstream television. Kenyan animators are producing thematically rich and culturally resonant works such as *The Legend of Ngong Hills (2011)*, *The Legend of Lwanda Magere (2020)*, and *Tera Storm (2022)*, yet these remained absent from FTA programming, while foreign productions dominated youth viewership.

Objectives

The objectives of the study were:

- To examine the extent to which local animations address youth gratification on free to air platforms.

- To analyse the perspectives of animators on barriers to airing animations on free to air platforms.

Scope and Limitations: This study focused on the consumption and production of animation content within Kenya, specifically among youth aged 18–35, the demographic identified as the most active and media-engaged by the Kenya Film Commission (2011).

METHODOLOGY

Research design: The study will employ a descriptive qualitative cross-sectional design. The descriptive element is suitable because it aims to provide an in-depth account of attitudes, opinions, and behaviours as they exist at a particular point in time (Kothari, 2014). The qualitative approach is grounded in interpretivism, which assumes that reality is socially constructed and best understood through interaction with participants (Denzin & Lincoln, 2018). The cross-sectional design enables the collection of data from multiple categories of respondents; youth consumers, animators, and media professionals; simultaneously, providing a holistic view of how consumer motivations intersect with institutional logics shaping animation visibility on FTA platforms. This approach is particularly relevant for media and cultural studies, where understanding symbolic meaning and institutional processes is central (Silverman, 2020).

Target Population: The target population comprised three main groups: (a) Youth animation consumers aged 18–35 years. (b) Local animators and producers, whose experiences provide insights into creative production and distribution challenges. (d) Media house programmers and decision-makers, responsible for content acquisition, scheduling, and policy enforcement on FTA platforms.

Sampling Techniques and Sample Size

The study used purposive sampling, a non-probability technique that allows for the selection of information-rich cases relevant to the research objectives (Patton, 2015). Participants were identified based on their expertise or engagement with animation production or consumption.

- Youth participants were drawn from Nairobi-based universities, creative hubs, and social groups with interest in animation.
- Animators were selected from active studios and independent creators with notable works
- Media practitioners included content managers, programming heads, or regulatory officers from the four selected FTA broadcasters. The indicative sample is shown in Table 1.

Table 1. Sample Size

Category	Target Participants	Data Collection Method
Youth consumers (18–35)	20–24 participants (3–4 FGDs)	Focus Group Discussions
Local animators/producers	2 participants	Key Informant Interviews
Media house programmers/decision-makers	2 participants	Key Informant Interviews

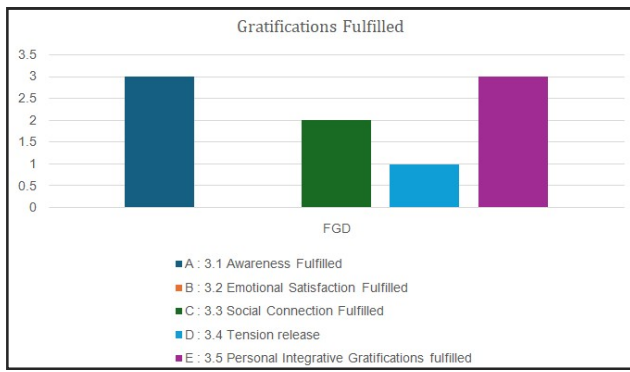


Figure 1. Gratifications Fulfilled

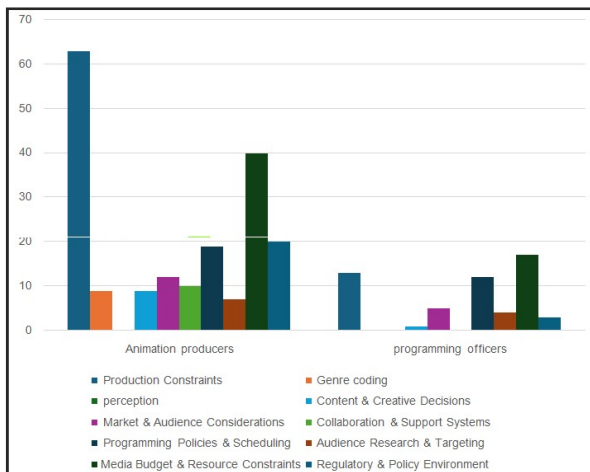


Figure 2. Perspectives of Animators and Media Officers on Barriers to Airing Local Animations on FTA Platforms

Ethical Considerations: The study was cleared by Department of Journalism and Mass Communication Research Ethics Committee. Informed consent was obtained from all participants before data collection. Data was anonymised using coded identifiers, and recordings will be securely stored and destroyed after analysis. Ethical conduct also adhered to the Kenya National Commission for Science, Technology and Innovation (NACOSTI) guidelines (2019). Special care was taken to protect professional confidentiality for media practitioners and animators discussing sensitive institutional issues.

Findings and Discussion: Extent to Which Local Animations Fulfil Youth Gratifications, This study analysed the extent to which Kenyan local animations aired on free to air platforms (FTA) fulfil the gratifications sought by youth aged 18–35. The analysis relies on nodes, which represent the major gratification categories under the Uses and Gratifications Theory (UGT) are shown in Figure 1:

Emotional Satisfaction Fulfilled: Emotional gratification emerged as the least fulfilled need within local animations, with zero references coded from the FGDs. This complete absence of emotional impact is notable given the strong affective responses participants described when discussing international animation titles such as *Black Clover*, *The Lion King*, and *Abominable*. Youth consistently reported that no Kenyan animation elicited comparable feelings of excitement, empathy, sadness, inspiration, or narrative attachment. As one participant stated bluntly,

“I don’t see any Kenyan animation that evokes emotions in me,”

while another reinforced this sentiment with,

“Not really. Not Kenyan.”

Such remarks capture a recurring pattern across all discussion groups. From a UGT perspective, affective gratification is a core driver of media engagement; viewers gravitate toward content that moves them emotionally and enables mood management, emotional release, or deeper psychological connection. The absence of this gratification in local productions reflects several structural limitations identified by participants: weak character development, shallow or predictable storylines, limited emotional arcs, and insufficient world-building that fails to sustain immersion. Participants also highlighted inconsistencies in tone and pacing, which further hinder emotional resonance. As a result, local animations struggle to create characters or narratives that viewers can bond with, empathise with, or feel invested in. The lack of affective fulfilment not only reduces the entertainment value of local animations but also weakens their potential for cultural impact and audience loyalty. This emotional gap therefore represents one of the most significant barriers to the growth and competitiveness of Kenyan animation on FTA platforms.

Social Connection Fulfilled: Social integrative gratifications, such as peer interaction, group belonging, and participation in fan communities, were only minimally fulfilled by local animations, reflected in just two references across the FGDs. Participants described vibrant social ecosystems built around international animation, including active WhatsApp groups, TikTok discussions, meme cultures, campus anime circles, and Reddit communities. These platforms contribute not only to entertainment but also to identity signalling, group bonding, and shared intellectual or emotional engagement. However, youth noted that Kenyan animations rarely inspire similar interactions or communal dialogue. As one respondent stated,

“We don’t talk about Kenyan animations because there’s no hype... maybe if it appears on YouTube.”

Another added that the few conversations that do emerge tend to be event-driven rather than organically sustained:

“Only discussions I recall were about award nominations at Kalasha, not regular engagement.”

This marginal social presence limits the ability of local animations to cultivate fan communities, which are central to UGT’s social integrative dimension. Without recurring conversations, shared anticipation, or collective analysis—elements that drive the popularity of global titles—local content struggles to generate the sense of belonging and peer recognition that youth often seek through media consumption. The absence of ongoing social discourse also reduces visibility and restricts the potential for Kenyan animations to develop enduring cultural relevance among young audiences.

Tension Release / Entertainment: Entertainment and tension release, identified earlier as the strongest gratification sought by youth, were only marginally fulfilled by local animations. Although participants expressed a positive willingness to

support Kenyan content, this enjoyment was conditional on improved production value and greater visibility. As one respondent noted,

"If the animation is quality and advertised well, I would watch it... I want Kenyan animation to grow."

This sentiment reflects an underlying desire to take pride in local content, but also a recognition that current offerings fall short of providing the escapism, humour, or immersive pleasure typically associated with the medium. While UGT emphasises diversion and escapism as core functions of media, the FGDs revealed that factors such as, low-budget aesthetics, and limited narrative depth hinder local animations from delivering the relaxation and mood-enhancing experiences youth derive from international productions. Unlike titles that captivate audiences through dynamic worlds, compelling humour, or high-intensity action, Kenyan animations were described as enjoyable "in concept" but not strong enough in execution to sustain viewer engagement or offer meaningful stress relief. This gap indicates that although entertainment has the highest demand, it remains the least reliably fulfilled by local FTA animation due to structural and production-related constraints.

Personal Integrative Gratifications fulfilled: Personal integrative gratifications, encompassing identity reinforcement, moral reflection, and the affirmation of values, were partially fulfilled, with three references coded in the FGDs. Participants acknowledged that Kenyan animations possess the potential to communicate cultural heritage, ethical lessons, and socially relevant narratives. For example, one respondent noted,

"There is learning and cultural exposure... but exposure is limited,"

while another observed,

"Local animations don't inspire like foreign ones, but they could help develop identity if promoted and improved."

These remarks suggest that local content can support personal growth and identity formation, but only under conditions of greater accessibility, improved production quality, and strategic promotion. From a UGT perspective, personal integrative gratifications are strengthened when media content allows viewers to reflect on values, adopt aspirational models, or experience cultural pride. In the context of Kenyan FTA animation, the partial fulfilment indicates that while storylines and characters occasionally resonate with cultural or ethical themes, structural limitations, such as minimal distribution, low production budgets, and lack of marketing, reduce the ability of these works to meaningfully engage youth audiences. Consequently, the personal integrative potential of local animations remains conditional rather than fully realised, reinforcing the broader pattern of a gratification gap across multiple dimensions.

Factors in the Unfulfillment of Youth Gratification: Analysis of FGD data highlighted multiple structural and creative factors that constrain the fulfilment of youth gratifications in Kenyan animations. Production quality emerged as the most frequently mentioned barrier (9 references), with participants emphasising that limited technical expertise, inadequate collaboration, and resource

constraints reduce the impact of local content. For instance, one participant observed,

"Kenyan animators work individually... collaboration is limited,"

while another noted,

"We don't have the machines or exposure to high-level production like Moana or Lion King."

Closely linked to production issues, marketing and awareness were cited in eight references as critical determinants of gratification. Participants highlighted that even high-quality animations fail to reach audiences due to weak promotion and limited distribution:

"Marketing is weak; even good content doesn't reach audiences."

The lack of visibility undermines social, entertainment, and cognitive gratifications, as youth cannot engage with or share content they do not know exists.

Audience relevance and storytelling practices were also highlighted, with seven references indicating that content often does not reflect youth interests or fails to maintain engagement. Participants pointed to directing challenges and suboptimal narrative execution, such as

"having a character conversing for five minutes in one shot where whatever they are saying is not moving the story forward."

Such practices reduce emotional connection, cognitive engagement, and the overall appeal of the animation. Together, these factors illustrate that gratification unfulfilment is multidimensional. Low production quality, inadequate marketing, limited audience alignment, and weak narrative execution interact to prevent local animations from meeting youth expectations across cognitive, affective, social, personal integrative, and entertainment domains. From a Media Institutionalism perspective, these constraints reflect systemic gaps in resources, industry standards, and institutional support, reinforcing that both technical capacity and strategic dissemination are critical for enhancing gratification fulfilment. Perspectives of Animators and Media practitioners on Barriers to Airing Local Animations on free to air platforms 'An analysis of findings from Key Informant Interviews (KIIs) with local animation producers and programming officers to explore the barriers affecting the production, scheduling, and broadcast of local animations on Free-to-Air (FTA) platforms revealed the key challenges as shown in Figure 3.

Production Constraints: Production constraints emerged as the most frequently cited barrier affecting local animation, with 63 references from animation producers and 13 references from programming officers, according to the NVivo frequency matrix. This high frequency underscores the centrality of production-related challenges in limiting the creation and broadcast of local animation. Respondents consistently highlighted limited budgets, insufficient human resources, and tight production timelines as the primary obstacles. High-quality animation is resource-intensive,

requiring skilled animators, access to specialized software, and extended production periods—resources that are often scarce in the local context.

One producer noted,

“There are quite a number, but the major one is, number one, funding. And also the scope of work because it takes a lot of time to do some of these things. And if there's no funding, it's going to take you a very lengthy time to do it.”

Another highlighted the mismatch between production expectations and available resources:

“Telling someone I am giving you 5 million to produce 30 episodes. That might be possible for live action, but for animation we don't have the ecosystem and capacity, which reduces the cost.”

These statements illustrate the disconnect between production ambitions and the financial and technical realities of the Kenyan animation industry. Respondents also emphasized the logistical pressures of scaling animation projects. One producer shared,

“We went with one episode and they wanted 24 episodes. That was just blowback, that was their main caveat. Then the other one was we need to get advertisers to put us on board, so we have to look for sponsors, get the 24 episodes, and find sponsors who are going to buy airtime.”

Programming officers echoed this sentiment, noting that *“Everything is money. Producing animation is very, very expensive.”*

The frequency matrix further highlights that production constraints dominate over other barriers such as programming policies (19 references) and collaboration challenges (10 references), reinforcing their critical role in shaping the local animation landscape. Overall, these findings indicate that without increased funding, technical capacity development, and realistic production planning, local animation projects are likely to remain limited in both scale and quality.

Content and Creative Decisions: Both animation producers and programming officers highlighted challenges related to storylines, themes, and animation style as key barriers to the broadcast of local animations on FTA platforms. Many producers reported that creative decisions are often constrained by budget limitations and perceived audience preferences, forcing them to prioritize cost-efficiency over narrative complexity or innovation. One animator noted,

“Actually, it's more lucrative when it comes to kids' productions than adult productions because the cost of producing is lower.”

This reflects a tendency to focus on formats and genres that are financially viable, even if it limits the diversity and thematic richness of content. This is because older audiences have higher expectations for aesthetics as the results in Objective 1 and two indicated.

Programming officers reinforced this perspective, emphasizing regulatory and internal compliance factors. A media executive explained,

“So, we do not mind taking programmes, but it has to adhere to our in-house programming code. You don't just bring any animation and expect it to go on air. Because it has to go through many processes if it is to go on air.”

This underscores the role of editorial standards, audience suitability, and organizational protocols in shaping what content is ultimately approved for broadcast. Together, these findings suggest that local animation content is shaped not only by creative intent but also by financial, regulatory, and audience-driven considerations. The need to align with FTA expectations often leads to compromises in storytelling innovation and stylistic experimentation, highlighting the tension between creative ambition and operational realities within the Kenyan animation ecosystem.

Market and Audience Considerations: Market dynamics and youth audience perceptions were frequently cited as influential factors, with 12 references from animation producers and 5 from programming officers. Animators perceive a strong demand for local content among youth, suggesting that there is a receptive audience for Kenyan animation. One producer explained,

“[We consider] the needs of the audience...because their needs come in as primary; the needs of the commissioner...will be the reference point as we try to meet the primary needs of the audience.”

Producers further noted that broadcasters often base scheduling decisions on viewership numbers rather than audience preference for local content. As one animator observed, “I think what drives them is numbers and they go where there are numbers. Until the animation community ensures that there are eyeballs on animation, TV studios will just go where there are numbers. That's what they are doing for cinemas, soaps, and music videos, they schedule based on where there are eyeballs.” Another producer acknowledged the research supporting local animation, stating,

“Ah, yes, we do. And the good thing about animation is that already a lot of research has gone into it in terms of the types, different genres of animation that are out there.”

Programming officers highlighted the practical and financial realities that shape content decisions. One officer noted,

“It might not really help if you just want to please the audience, and then you buy a programme; then after a while, you phase it out. It won't serve the purpose of programming.” Another added,

“But we must detect the financial aspect of things, like the finances. Are they able to sustain us? Because we can't just put something on air and there will be no good advertising.”

These insights indicate that while there is an identifiable demand for local animation among youth, broadcast decisions are heavily influenced by financial sustainability, audience reach metrics, and advertiser interest. Consequently, even when youth audiences express a preference for local content, market pressures and revenue considerations often determine which animations are prioritized for FTA airing. This tension between audience demand and broadcaster economics

highlights a key barrier to the consistent exposure of Kenyan animation.

Collaboration and Support Systems

Collaboration with sponsors, broadcasters, and institutional partners emerged as a notable barrier, cited 10 times by animation producers, though it was not referenced by programming officers. Respondents emphasized that weak partnerships limit the visibility of local animations and reduce opportunities to secure prime-time slots on FTA platforms.

One producer noted,

“There is a lack of collaborative engagement between the two parties, so you find producers or studios don't know what TV stations are going for, and then the TV stations don't know what animation studios want.”

This highlights a communication gap that hinders coordinated planning and mutual understanding between creators and broadcasters. Another producer linked this challenge to resource limitations, stating,

“That is true, and that boils down to funding. We work in silos. We don't make enough to be able to accommodate specialized personnel.”

Producers also pointed to limited engagement with potential sponsors and a lack of business acumen as barriers to building strategic partnerships. One participant recalled,

“I think how the conversation went was that we meet with high-level sponsors and then talk further. That's what I recall, we do not go into the dynamics of the question of sponsors, how much we get, plus back then we were not savvy to the business language of profit sharing and stuff like that.”

These insights suggest that the absence of strong collaboration networks and professional support systems undermines the sustainability and visibility of local animation. Building structured partnerships with broadcasters, sponsors, and institutional stakeholders could enhance access to funding, expertise, and scheduling opportunities, thereby increasing the likelihood of local animation reaching wider audiences.

Programming Policies and Scheduling

Programming policies and scheduling were identified as important factors shaping the broadcast of local animations, with 19 references from producers and 12 from programming officers. Respondents indicated that while limited airtime allocation is not a major challenge, scheduling decisions are strongly influenced by advertiser perceptions, organizational priorities, and regulatory considerations.

Local animations, predominantly targeted at children, are often scheduled during off-peak hours, whereas foreign content dominates prime-time slots due to perceived higher commercial returns. One producer explained,

“And the TV station, most of the times, they want just airing rights. So they won't buy your IP. With the airing rights, they won't pay you the production cost because it's more like they're hiring it.”

Programming officers further emphasized that cost and quality considerations affect what content is deemed suitable for prime-time slots. One officer stated that available local animation often lacks the production quality necessary to attract high-paying advertisers, limiting its placement in prime-time:

“So we do not mind taking programmes, but they have to adhere to our in-house programming code. You don't just bring any animation and expect it to go on air.”

Budgetary constraints also influence scheduling decisions. As one programming officer explained,

“The cost also is a factor, because usually there is a budget that is done, and you cannot exceed that budget. So that cost factor is healthy, but it's not just on animation, it's all around.”

Public broadcasters, while prioritizing Kenyan content, must balance this mandate against commercial viability:

“Yeah, we are a public broadcaster, and so we prioritise Kenya first, and then we go regional, before we move to other places.”

In summary, the findings suggest that even though airtime exists, local animations are frequently relegated to off-peak slots due to concerns about production quality and advertiser appeal. Programming decisions are thus shaped by a combination of content suitability, revenue potential, regulatory compliance, and audience targeting, which collectively constrain the visibility and commercial success of local animation on FTA platforms.

Audience Research and Targeting: Limited audience research emerged as a significant barrier affecting the development and broadcast of local animation, with 7 references from producers and 4 from programming officers. Both groups acknowledged that the absence of robust, systematic viewership data often forces content and scheduling decisions to rely on assumptions rather than evidence, which can hinder the prioritization and promotion of local animation. One producer noted,

“We've never done a serious research...we may have a few who've not really done their research well.” Another explained, *“So when they look at it as a TV station, they look at the audiences they have, and they look at the perception of animation out there.”*

These comments highlight that producers often lack comprehensive insights into audience preferences, genre popularity, and consumption habits, limiting their ability to tailor content effectively.

Programming officers echoed this concern, emphasizing that existing research mechanisms rarely provide actionable information on animation. One officer stated,

“According to our research company that we have, they have never told us anything about animation.”

This indicates that even when audience measurement systems exist, local animation is often excluded from analysis, resulting in programming decisions that favor content with

established metrics or commercial predictability. Overall, the findings suggest that the lack of rigorous audience research and targeting creates a feedback gap: local animation cannot be strategically developed or promoted because broadcasters and producers do not have sufficient data on what viewers want or how they engage with domestic animated content. Strengthening audience research systems could provide evidence-based insights that inform production, scheduling, and marketing strategies, ultimately enhancing the visibility and reach of local animation on FTA platforms.

Regulatory and Policy Environment: The regulatory and policy environment was frequently cited as a barrier to the development and broadcast of local animation, with 20 references from producers and 3 from programming officers. Respondents highlighted weak enforcement of existing policies as a key challenge, noting that while frameworks such as the Draft National Film Policy (2021) exist, there are no binding quotas, incentives, or structured support mechanisms compelling Free-to-Air (FTA) stations to prioritize local animation. Producers emphasized that local animations are often aired only to meet generic local content requirements, rather than as part of a strategic effort to support the animation industry. One producer stated,

“They're trying to just show the animations because they want to reach that quarter, 40 percent local content, so that they don't lose a licence.”

Another added,

“The policies that are there are blanket policies; I wouldn't say they support the ecosystem per se.”

Respondents also noted gaps in implementation and funding mechanisms. As one producer explained,

“Now, the framework is usually the issue, how do they start funding animation? It's an area that has not been explored very much and not very well understood.”

Another observed,

“So as much as KFC [Kenya Film Commission] is looking at film in general, they are not really looking at animation per se.”

These statements indicate that while film policies exist, animation-specific support structures, such as dedicated funding, production incentives, or broadcast obligations, remain underdeveloped, leaving the industry reliant on ad hoc initiatives and limited commercial interest. Overall, the findings suggest that the absence of enforceable policies and dedicated institutional support constrains the growth of local animation. Without stronger regulatory frameworks, targeted incentives, and clear operational guidelines, FTA stations are unlikely to prioritize locally produced animation, thereby limiting its exposure and commercial viability.

Genre Coding and Perception: Genre coding and audience perception emerged as a notable consideration in the production and broadcast of local animation, with 9 references from producers. Respondents indicated that while animation is not inherently perceived as content solely for children, producers often focus on children's animation due to its lower production costs and relatively simpler technical requirements.

Young audiences are attracted to colorful visuals and are less demanding regarding advanced technical or narrative complexity, making children's animation a cost-effective and commercially viable option. Producers highlighted the dual advantages of creating content for children: the inherent demand among young audiences and the regulatory requirement for broadcasters to meet quotas for children's programming. One producer explained,

“Not true, there is no misunderstanding or stereotyping that animation is for children.”

Another noted,

“So, yeah, the demand is there. And we know that kids really love watching art, and especially in this country.”

A further observation emphasized the financial incentive:

“Kids' productions are more lucrative, way more lucrative than those other age groups.”

These insights suggest that economic considerations, audience characteristics, and regulatory incentives collectively influence genre selection in local animation. While animation has the potential to appeal to a wide range of age groups, current production trends are strongly shaped by cost-efficiency and compliance with broadcast regulations, which can limit experimentation with diverse genres and content aimed at older audiences.

CONCLUSION

This study concludes that, generally, youth consumer needs are many and varied, but largely unmet due to institutional barriers, high purchase costs, and programming structures. Further, youth gratifications are mainly influenced by foreign content, especially in the areas of entertainment, humour, emotional immersion, and narrative continuity.

RECOMMENDATIONS

Based on the findings, it is suggested that Government and Regulatory bodies provide funding or incentives for co-productions; refine and enforce animation-specific content regulations; and support capacity-building in scriptwriting, sound, and serialisation. To bolster the industry, animation producers and studios should prioritise strong narratives and emotional storytelling, and gradually improve technical quality of productions through partnerships. Youth should also be engaged through social media, teasers, and participatory content. Additionally, training institutions should strengthen curricula in scriptwriting, story design, and production pipelines to ensure quality art works.

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