

Adam Kamese

Understanding of The Tanzanian Animation EcoSystem

Research Project Report



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Understanding of the Tanzanian Animation Ecosystem
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Legal notice
TanzAnimation is a training initiative aimed at creating development in the Tanzanian and East-African animation eco-systems, supporting the development of a sustainable creative audiovisual industry. TanzAnimation II is co-funded by the GLOBUS Fund under the Danish Ministry of Foreign Affairs.

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LIST OF ABBREVIATIONS	
AI	Artificial Intelligence
FGDs	Focused-Group Discussions
GDP	Gross Domestic Product
IDIs	In-Depth Interviews
IP	Intellectual Property
NGOs	Non-Governmental Organizations
PESTEL	Political, Economic, Social, Technological, Environmental, and Legal
VR	Virtual Reality



EXECUTIVE SUMMARY

Background and Introduction

The Tanzanian animation industry is in its early stages, facing challenges such as limited infrastructure, funding, and technical expertise. Despite these obstacles, the industry shows promise due to technological advancements, youthful talent, and growing demand for digital content. The TanzAnimation initiative is implemented by a partner group: Tai Plus/School of Creatives and Film Lab Zanzibar from Tanzania together with The Animation Workshop and Creative Viborg from Denmark. It is supported by the GLOBUS Foundation and aims to enhance the local animation ecosystem through tailored training programs and project development phases. Despite the steady growth of animation industry in Tanzania, little has been documented on the current trends and status of the industry. Therefore, the study seeks to understand the animation ecosystem in Tanzania, identify specific skills and competency needs, and inform future initiatives in animation education, training, and professional development. Thus, this study acts as benchmark to track progress and contribution of the TanzAnimation initiative,

Methods and Materials

The research was conducted in Tanzania from November 2024 to March 2025 using a mixed methods approach, combining qualitative and quantitative techniques. The study included online survey questionnaires (31 respondents), in-depth interviews (5 studios), focused-group discussions (2 groups of animators), and documentary reviews.



Key Findings

The industry shows a significant gender imbalance and is dominated by freelance work. Most animators are self-taught, underscoring the need for both short-term skill development programs and long-term formal training pathways. Key challenges include limited technical expertise, inadequate infrastructure, and insufficient funding.

Current Landscape of the Animation Industry in Tanzania

The industry is emerging sector within Tanzania’s media landscape, driven by technological advancements and youthful talent. However, it faces structural challenges, including limited access to high-end equipment, a shortage of trained professionals, and insufficient institutional support.

Business Development and Support of Animation Industry in Tanzania

Financial support is critical for the industry’s growth, with most respondents relying on production sales and grants. The industry operates within a broader macroeconomic environment influenced by political, economic, social, technological, environmental, and legal factors

Expertise and Experiences of Animation Industry in Tanzania

The industry is dominated by early-career professionals with less than six years of experience. There is a clear need for structured sustainable capacity-building programs at different levels of specialisation, as well as ongoing mentorship programs to enhance professional advancement.

Projected Outlook for the Animation Industry in Tanzania

The industry is poised for substantial growth, driven by increasing interest from content creators and consumers. The potential for growth is promising, with emerging opportunities in education, health communication, and cultural storytelling.

Conclusion and Recommendations

The Tanzanian animation industry shows promise but faces challenges such as limited technical expertise, infrastructure, and funding. Targeted investment and strategic development are essential to support its growth and sustainability.

BACKGROUND AND INTRODUCTION

1.1. Introduction

Currently, the animation industry in Tanzania is in its early stages compared to other African countries like South Africa, Nigeria and Kenya, which have established themselves as regional hubs with vibrant creative sectors and growing international recognition. Today, Tanzania's animation industry remains relatively small, with limited infrastructure, funding, and technical expertise.

The TanzAnimation2 program is a collaborative initiative between Tanzanian and Danish partners, including Tai Plus, Film Lab Zanzibar, The Animation Workshop, and Creative Viborg. Funded by the Danish GLOBUS Foundation, the program aims to strengthen the Tanzanian animation ecosystem by identifying its size, scope, and key skill gaps. Based on these insights, it will implement a tailored training program to address the industry's needs and support its development. Running from October 2024 to July 2025, the initiative includes hands-on training activities in Tanzania (January 2025) and a focused project development phase in Denmark (July 2025). By equipping Tanzanian animators with practical tools and knowledge, the program seeks to expand job opportunities and contribute to the growth of the country's creative economy.

This initiative aims to position Tanzania as an East African hub for animation production, which would bring both economic and cultural benefits to the country. A major challenge today is the limited availability of technical expertise and infrastructure for animation production. While Tanzania has many talented artists and storytellers, there is a shortage of professionals skilled in animation, visual effects, and digital media: skills essential for bringing Tanzanian culture and stories into a media-rich future.

1.2. Purpose of the Research

This animation research project was undertaken to gain a comprehensive understanding of the animation ecosystem in Tanzania, with the overarching goal of contributing to the development of a knowledge platform that can support the growth of a stronger and more sustainable animation industry in the country.

The primary objective of the study was to identify the specific skills and competency needs within the Tanzanian animation sector –an industry that demonstrates both ambition and potential to evolve into a vibrant and competitive creative economy. Importantly, this study fills a critical gap, as no prior surveys or data-driven assessments of the sector currently exist. By generating new data and insights, the project aims to inform future initiatives in animation education, training, and professional development, thereby supporting the creation of a technically proficient and creatively skilled workforce.

1.3. Research Questions

Therefore, this research project was guided by the following key research questions:

1. What is the current landscape of the animation industry in Tanzania?
2. What growth areas and opportunities exist for the development of the Tanzanian animation industry?
3. How does the business environment and available support impact the animation industry in Tanzania?
4. What are the primary training and skill development needs within Tanzania's animation industry?
5. What is the projected future outlook for the animation industry in Tanzania?



METHODS AND MATERIALS

2.1. Study Approach

This research project was conducted in the Dar es Salaam region, a choice primarily informed by the concentration of animation studios and practitioners within the area. A preliminary desk review revealed that the majority of Tanzania's animation studios and active animators are based in Dar es Salaam (for qualitative component) and animators from different region reached through online quantitative, making it the most strategic location for the study .

A descriptive research design was employed to explore and describe the current state of the animation industry in Tanzania. This design was supported by a mixed methods approach, combining both qualitative and quantitative techniques to collect data that would provide a comprehensive understanding of the animation ecosystem. The integration of both data types enabled the study to capture statistical trends alongside in-depth insights from industry professionals.

2.2. Study Population

The target population for this study included both formal animation studios and freelancers working within Tanzania's animation industry. The inclusion criteria required that participants whether studios or individual practitioners had produced or contributed to at least one animation project before the commencement of this research. This ensured that all respondents had relevant experience and engagement with the animation production process, thereby enhancing the validity and relevance of the data collected.

2.3. Sampling Procedures

Purposive sampling was initially employed to identify and select animation studios operating in Dar es Salaam that were active and accessible during the study period. In addition to engaging with formal studios, the study also reached out to individual professionals working within the animation industry, such as animators, scriptwriters, producers, and other creative contributors. To access this broader group particularly freelancers who are not affiliated with formal institutions the research team utilized a combination of convenience sampling and snowball sampling.

Convenience sampling enabled the team to collect data quickly from individuals who were readily available and willing to participate. In parallel, snowball sampling played a crucial role in identifying freelancers and informal practitioners who were not initially known to the researchers. Participants were encouraged to refer peers within their professional networks, which allowed the sample size for the quantitative component of the study to grow organically. This blended sampling strategy proved effective in capturing a more diverse and representative picture of the animation ecosystem in Tanzania.



2.4. Data Collection Methods

The data collection process gathered both primary and secondary data to allow for a deeper understanding of the animation ecosystem in Tanzania. Primary data collection methods included survey questionnaires, in-depth interviews, small-group discussions, and participant observations. For secondary data, the study conducted documentary reviews of studio profiles available on websites and social media platforms.

Survey Questionnaire

Survey questionnaires containing close-ended questions were administered to a broad group of individuals working within the animation industry, including but not limited to animators, scriptwriters, producers, and sound engineers. This method was employed to collect quantitative data on demographics, work experiences, and perceptions related to the industry. Using the online data collection platform KoboToolbox, questionnaires were either self-administered by respondents or administered with the support of research assistants.

Focus Group Discussions

At least two informal FGDs were held with animators from different studios to encourage open sharing of experiences and perspectives. These sessions provided an opportunity to explore common challenges, collaboration models, and creative processes in a more interactive format. With participants’ informed consent, the discussions were audio recorded, and a set of open-ended guiding questions was used to facilitate the sessions.

In-depth Interviews

IDIs were conducted with representatives from each of the nine selected studios, including managers, lead animators, and other key personnel. Interview guides were developed to ensure relevant and consistent data collection across all participants. A total of nine interviews were conducted at the respective studio offices. Upon receiving informed consent, all interviews were audio-recorded for transcription and analysis purposes.

Documentary Reviews

Publicly accessible digital content including official websites and social media pages such as YouTube, Instagram, and LinkedIn were reviewed to gain background information about the studios, their creative work, public image, and marketing strategies.

2.5. Data Management and Analysis

To ensure completeness and validity, data cleaning was initiated at the field level, where enumerators, in consultation with the principal investigator, reviewed the collected data daily for completeness and accuracy before submitting it to the KoboToolbox server.

The qualitative information gathered through audio recordings was first transcribed in Swahili and subsequently translated into English. Quantitative data analysis was conducted using Python version 3, with descriptive statistics generated in line with the key research questions that guided the survey. In addition, qualitative data was analyzed using content analysis techniques to identify recurring themes and patterns relevant to the study objectives.

2.6. Ethical Considerations

Research Permit

The principal investigator was responsible for overseeing the implementation of the entire survey, the research permit was sought from COSTECH.

Informed Consent

Participants were asked to sign consent and assent forms as a formal agreement to take part in the research project. The research team also sought and obtained consent to record all qualitative interviews, allowing for accurate transcription and analysis of the data collected shortly after the interviews were conducted.



KEY FINDINGS

3.1. Demographic of Animators

An analysis of demographic and employment characteristics within the Tanzanian animation industry provides insights into the workforce composition. Based on data from 31 respondents, the following trends emerge. Out of the total participants, 23 identified as male, accounting for 74.2%, while 8 identified as female, representing 25.8%. This distribution indicates a significant gender imbalance within the industry, with men comprising the majority of practitioners. The data suggests a need for increased efforts to promote gender equity and inclusivity in the creative and digital arts sector.

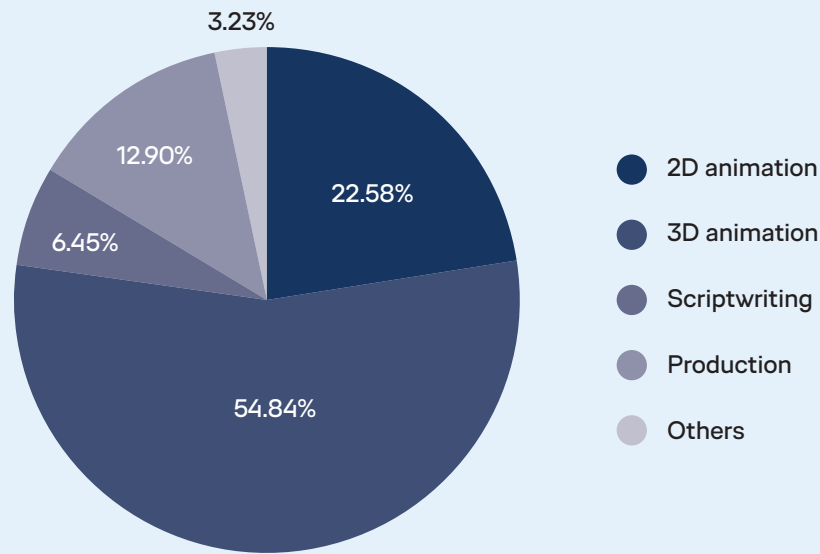
The employment data shows that only 10 respondents (32.3%) are formally employed, whereas 21 (67.7%) identify as freelancers. This demonstrates that the animation industry in Tanzania is largely freelance driven, highlighting its informal and flexible nature. The dominance of freelance work suggests that while opportunities exist, they are often project-based or temporary, potentially limiting job security and career progression for practitioners. Refer Table 1 below.

Table 1: Gender and Employment Characteristics

Attributes	Counts = 31	Percent
Male	23	74.2
Female	8	25.8
Employed	10	32.3
Freelancer	21	67.7

Respondents were also asked to indicate their primary area of focus within animation. The majority (54.84%) reported working in 3D animation, followed by 2D animation at 22.58%. Other areas included production (12.9%), scriptwriting (6.45%), and other creative roles (3.23%). The dominance of 3D animation reflects a growing technical orientation within the sector, possibly influenced by software accessibility and demand for more dynamic content.

Figure 1: Area of Focus in Animation Works



Regarding training, the majority (54.84%) of respondents reported being self-trained in animation. 38.7% indicated they were trained through college or formal education, while only 6.45% relied on online courses. These findings highlight the strong presence of self-directed learning within the industry, likely due to limited access to specialized academic programs in animation. It also underscores the need for formal training opportunities to support professional development and skills advancement. See Table 2.

Table 2: Training Methods

Training Method	Counts = 31	Percent
Self-trained	17	54.84
College trained	12	38.70
Online courses	2	6.45

Likewise, the findings from qualitative data, revealed that a major challenge facing the animation industry in Tanzania is the lack of formal, specialized training in animation, which has resulted in a notable skills gap within the workforce. This issue was highlighted during an in-depth interview with AFYATOOON, where it was observed that,

“...Most animators have a background in multimedia, not specifically in animation. Even the ones we work with have learned on the job...”

IDI/AFYATOOON, (2024)

The above statement underscores the reality that while many creatives possess general digital media skills, few have received structured education or hands-on training tailored specifically to animation production. The implications of this skills gap are multifaceted. First, it can impact the technical quality and efficiency of animation productions, as individuals may lack knowledge in areas such as 3D modelling, rigging, animation principles, or storytelling techniques that are unique to the field. Second, the reliance on informal, on-the-job learning places pressure on animation studios to provide in-house mentorship and capacity-building, diverting time and resources that could otherwise be used for creative development or scaling operations. As a result, studios are forced to function both as businesses and training institutions diverting resources from content development and growth to capacity-building.

3.2. Current Landscape of the Animation Industry in Tanzania

3.2.1. Industry Overview

The animation industry in Tanzania is a growing creative sector within the country’s broader media and entertainment landscape. This is evidenced by the increasing number of local studios such as Ubongo, Kijiweni Productions, Tai Plus, and Majhala Animation Studios just to mention few. The rise of training programs at institutions like Bagamoyo College of Arts, and independent bootcamps (e.g., Buni Hub’s animation lab) also reflects the sector’s professional growth and appeal among young creatives.

More importantly, over the past decade, the industry has experienced increased visibility, driven by several key factors. Firstly, digital platforms such as YouTube and local television stations (e.g., TBC and Azam TV) have provided wider distribution for animated content like Ubongo Kids, Akili and Me, and Tai plus contents which collectively reach millions of viewers across Sub-Saharan Africa (Ubongo, 2021, Tai Tanzania impact report, 2023). Secondly, Tanzanian animators have gained exposure through participation in regional and International events such as ZIFF, Pan African Film Festival (PAFF), Silicon Valley Film Festival, and screening of Baharimani animation at COP even 2024. Thirdly, international development organizations and development partners such as UNICEF, UNFPA, Total Energies, Canadian Embassy have recognised animation as a strategic sector within the creative health, education, environmental and economy, providing funding and visibility through cultural programs. These developments collectively point to an industry that is not only growing but becoming an integral part of Tanzania’s digital cultural export.

Despite steady growth, the industry still faces several structural challenges. These include limited access to high-end equipment and software, a shortage of trained professionals, and insufficient institutional support. Moreover, funding remains a major constraint, with most studios relying on project-based work, donor support, or corporate commissions to sustain operations. The lack of a structured animation curriculum in most creative arts programs also hampers skill development, forcing many artists to rely on self-learning or short-term training initiatives. Beyond training, it remains especially difficult for Tanzanian animators to develop, produce, and distribute independent, authentic, and artistically driven animation films particularly those not tied to commercial sponsors, NGOs, or educational messaging.

This limits the exploration of personal narratives and experimental forms, restricting the artistic growth and diversity of the sector.

Nonetheless, the industry’s growth trajectory is promising due to an increasing adoption of mobile devices and internet access among Tanzanians creates an expanding market for digital content. Additionally, the cultural richness of Tanzania offers animators a unique opportunity to develop authentic, globally appealing stories rooted in local heritage. With targeted investment in infrastructure, capacity building, and public-private partnerships, Tanzania’s animation industry has the potential to become a vital component of the national creative economy.

3.2.2. Key Players and Market Share

Tanzania’s animation ecosystem comprises independent studios, freelance animators, digital storytelling collectives, and educational institutions with budding media programs. Studios such as Ubongo, BongoToonz, Tai Plus, Kijijiweni Productions, OnaStories, Media One Production and Smart Studio are among the key players shaping the local industry. These organizations have begun to establish a reputation for producing culturally relevant, engaging, and socially conscious content that resonates with both Tanzanian and broader African audiences.

MediaOne Production
African Institute for Digital Innovation (AIDI)

Founded in 2011, Media One Productions is a Tanzanian creative agency based in Dar es Salaam, specializing in photography, cinematography, motion design, and strategic communication. The company has made significant contributions to the local animation industry by establishing its own animation studio and producing animated content for social campaigns and brand storytelling. With over 15 years of experience, Media One has also played a key role in nurturing animation talent through its training arm formerly known as MediaOne School and now operating as the AIDI. Through these efforts, the company has positioned itself as a pioneer in Tanzania’s animation and multimedia landscape, blending creativity, education, and innovation to drive industry growth.

Status: Not active (Last 2018)
Web: www.mediaone.co.tz
Facebook: MediaOne TZ
Instagram: mediaone_tz
YouTube: None
Number of animated videos: Unknown

Ona Stories

Ona Stories is a Tanzania-based digital storytelling company that specializes in immersive media, including augmented reality (AR), virtual reality (VR), and 360-degree video production. Founded in 2016 and headquartered in Dar es Salaam, Ona Stories is known as the first company in the country to pioneer AR and VR storytelling. Led by co-founders Princely H. Glorious and Tulanana Bohela, the company is dedicated to empowering African voices by producing innovative, mobile-first content tailored for both local and global audiences. Ona Stories also offers professional media training and capacity-building programs, equipping creatives and communication teams with skills in digital and platform-specific storytelling.

In addition to its production services, Ona Stories plays a key role in creative talent development through its Expert Network, which connects freelance creatives to professional opportunities and mentorship. The company has collaborated with major partners such as USAID and the Aga Khan University Media Innovation Center, producing impactful storytelling projects including AR exhibitions and youth-centered media campaigns. With an active presence on Instagram, Facebook, LinkedIn, and its official website, Ona Stories continues to shape the future of storytelling in Tanzania by blending technology, creativity, and social purpose.

Status: Active
Web: www.onastories.com
Facebook: Ona Stories
Instagram: onastoriestz
YouTube: Ona Stories
Number of animated videos: None

Kijiji Studios

Kijiji Studios was established in 2008, it is a media production company based in Dar es Salaam, Tanzania, specializing in content creation, film production, and audio production owned by Nafasi member artist and animator Nkumi Mtigwa who is the creative director. The studio has carved a niche in delivering authentic and compelling narratives that reflect Tanzanian culture and societal themes. It specializes in content creation, film production, audio production, photography, animation, and motion graphics. One of their notable animation projects is the Ubandani series, which comprises 15 puppetry videos focusing on COVID-19 management, access to information, and related topics.

Status: Unknown
Web: www.nafasiartspace.org/portfolio/kijiji-studios/
Facebook: Unknown
Instagram: Unknown
Number of animated videos: Unknown

Smart Studio

Tanzania, established in 2019, is a Dar es Salaam-based production house specializing in visual and audio production, including 2D and 3D animation, livestreaming, corporate event coverage, branded content, and jingle production.

Status: Active
Web: www.smartstudio.co.tz
Facebook: Smart Studio
Instagram: smartstudiotz
YouTube: Unknown
Number of animated videos: Unknown

Afyatoon

Afyatoon, founded in 2018, is a Tanzanian-based animation initiative operating under the Medtoon platform, focused on simplifying complex health information through creative storytelling and digital media. The company specializes in transforming scientific and medical content into accessible, animated narratives tailored to local audiences. Through the use of 3D animation, AFYATOON addresses various public health topics, using culturally relevant storylines and characters to enhance understanding and engagement. Their approach bridges the gap between health professionals and communities by turning technical jargon into relatable and visual content that resonates with Tanzanians.

Status: Active
Web: www.medtoon.co.tz
Facebook: Afyatoon
Instagram: afyatoon
Number of animated videos: 27



Tai Plus

Founded by Ian Tarimo and Gwamaka Mwabuka, Tai Plus is a Tanzanian-based marketing and distribution company dedicated to advancing Africa’s creative industry by supporting local animators, filmmakers, and digital creators. The company’s mission is to connect these artists with a global audience through strategic promotion, high-impact events, and robust storytelling platforms, thereby elevating African digital storytelling on the world stage.

Through her sister NGOs, Tai Plus has collaborated with notable organizations, including UNICEF, USDAF, and UNESCO, on various creative media projects aimed at social impact. The company has also produced award-winning 3D animations such as “Baharimania,” which has been showcased at international film festivals such as ZIFF, Pan African Film Festival (PAFF), and Silicon Valley Film Festival just to mention few.

Status: Active
Web: www.taipius.co.tz
Facebook: Tai Plus
Instagram: taiplustz
YouTube: Tai Plus TZ
Number of animated videos: 48

Kijiweni Studio

Kijiweni Productions is a boutique film production company based in Dar es Salaam, Tanzania, dedicated to telling authentic and socially relevant stories from the African continent. Founded in 2012 by filmmaker Amil Shivji, the company focuses on narratives that explore the complexities of Tanzanian society, aiming to amplify underrepresented voices and challenge prevailing social and political dynamics.

The company has produced internationally acclaimed feature fiction films, notably VUTA N’KUVUTE (Tug of War) (2022), which was screened at major festivals including the Toronto International Film Festival (TIFF). In addition to its live-action work, he company has also ventured into animation most notably with a film that garnered recognition at the Zanzibar International Film Festival (ZIFF), underscoring the studio’s commitment to diverse forms of storytelling and its growing influence within African cinema.

Status: Active
Web: www.kijiweniproductions.com
Facebook: Kijiweni Productions
Instagram: kijiweniproductions
Number of animated videos: 1

BongoToonz

Bongotoonz Animation Studio, established in 2009, is a Dar es Salaam-based multimedia company specializing in 2D and 3D animation, app development, video production, e-learning solutions, and website design. Led by CEO Musafiri Mbilinyi, the studio is renowned for its creative and innovative approach to digital storytelling, aiming to deliver high-quality animated content that resonates with diverse audiences. Bongotoonz has undertaken notable projects, including the development of the Kificho animated series, which sought funding through an Indiegogo campaign to bring Tanzanian narratives to the forefront of animation.

Status: Not active (Last 2016)
Web: www.bongotoonz.com
Facebook: Bongotoonz
Instagram: None
YouTube: Kificho
Number of animated videos: 1

Ubongo Kids

Ubongo Kids, an educational cartoon series developed by the Dar es Salaam-based social enterprise Ubongo, was founded in 2013 by Nisha Ligon, Rajab Semtawa, Cleng'a Ng'atigwa, Tom Ng'atigwa, and Arnold Minde. Designed for children aged 7 to 14, the series features five young protagonists who use their STEM knowledge and life skills to navigate and solve everyday challenges, making learning both engaging and practical for young African audiences.

Since its inception, Ubongo Kids has expanded its reach across the African continent. The show is broadcast in multiple languages, including English, Kiswahili, French, Hausa, Kinyarwanda, Kikuyu, and Luo, enabling it to connect with a diverse audience in over 33 African countries and multiple languages, Ubongo Kids makes learning fun and accessible across diverse cultural contexts. Studies have shown that the program improves children's math skills and supports broader educational development. It is distributed through TV, radio, and digital platforms, making it widely accessible.

Status: Active
Web: www.ubongokids.com
Facebook: Ubongo Kids
Instagram: @ubongo_kids
YouTube: Ubongo Kids Kiswahili
Number of animated videos: 786

Majhala Animation Studios

Majhala Animation Studios, founded in 2013 by Gwakisa Aston, is a Tanzanian-based 3D animation studio located in Baracuda - Tabata, Dar es Salaam. Specializing in character-driven animations and visual effects (VFX), the studio focuses on story development and delivering high-quality animation. Their mission is encapsulated in their motto: "Realization of Imaginations." The studio is particularly well known for the production of the Bwakila animated series, a locally developed project that has gained attention for its originality and cultural relevance.

Status: Active
Web: www.majhalastudios.blogspot.com
Facebook: Majhala Animation Studios
Instagram: majhala_animationstudios
YouTube: Majhala Animation Studios
Number of animated videos: 186



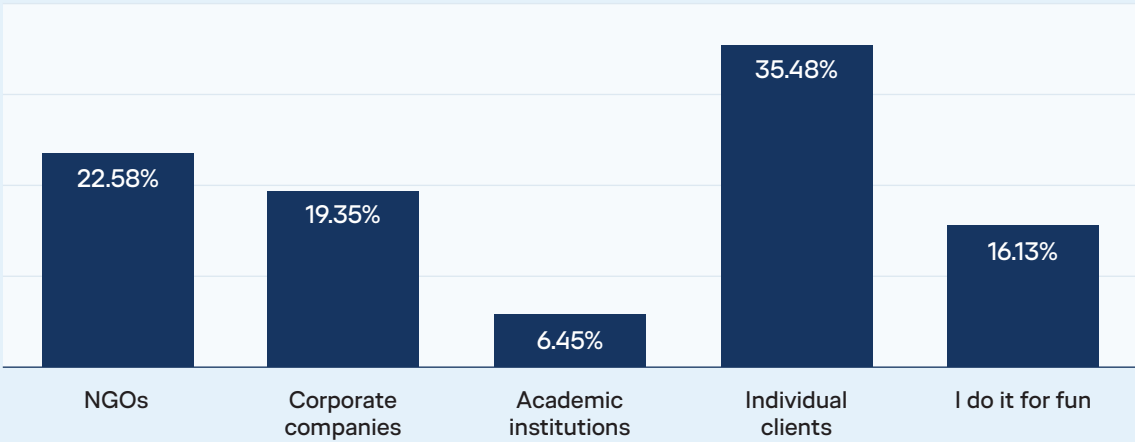


3.2.3. Content Demands and Market Mapping

Based on survey data from 31 respondents, the Tanzanian animation market serves a diverse customer base. The largest segment comprises individual clients , accounting for 35.48% of the market. In the context of the animation industry in Tanzania, individual clients refer to private, non-institutional customers who commission or purchase animation services or content for personal, entrepreneurial, or small business purposes. These clients may include entrepreneurs seeking animated promotional videos, independent artists or storytellers commissioning character design or short films, social media influencers using animation for branding or storytelling, and individual musicians creating animated music videos or promotional content. These individuals may seek animated content for personal, entrepreneurial, or informal purposes, suggesting a strong grassroots-level interest in animation services.

Figure 2 summarises market segmentation by customer type. Specifically, the findings revealed that NGOs represent the second-largest segment at 22.58%, reflecting the growing use of animation in advocacy, education, and community outreach programs. Corporate companies follow closely with 19.35%, indicating that businesses are increasingly incorporating animated media into their branding, advertising, and communication strategies. A smaller portion of the market is served by academic institutions (6.45%), likely using animation for educational content, research dissemination, or student engagement. Interestingly, 16.13% of respondents reported creating animation “for fun”, underscoring the role of animation as a hobby or passion project within the Tanzanian creative community.

Table 2: Market Segmentation by Customer Type



The data highlights a dual opportunity for content creators in Tanzania’s animation sector: to deepen engagement with domestic audiences while also scaling production to meet regional and international demand. The strong presence of NGOs and corporate clients further indicates that animation is increasingly recognized as a powerful tool for communication and outreach across sectors.

Table 3 provides a summary of market reach, with the animation market in Tanzania remains primarily local, with 48.39% of respondents indicating that their content is designed for in-country (Tanzanian) audiences. This suggests a strong demand for culturally relevant and localized narratives that reflect Tanzanian values, languages, and social issues. At the regional level, 29.03% of respondents serve African audiences beyond Tanzania, indicating a growing pan-African appeal and the potential for regional expansion. International markets account for 22.58%, showing that some Tanzanian animators are already accessing global audiences although this remains a smaller segment of the overall market.

Table 3: Market Reach by Regional Distribution

Animation market	Counts = 31	Percent
Local (in-country) audiences	15	48.39
Regional (African) audiences	9	29.03
International (Global) audiences	7	22.58

Moreover, during an interview with a representative from AFYATOON, it was noted that there is a growing number of people who are interested in the animation space. This signals that the industry is somewhat recognized not only for its entertainment value but also for its capacity to convey complex messages in an engaging and relatable format. This suggests a growing demand for locally produced, culturally relevant animated content, which could contribute to job creation, skill development, and the international visibility of Tanzanian creatives. This reflection was captured during the interview with a representative from AFYATOON, who shared the following excerpt.

“...The animation ecosystem in Tanzania is growing rapidly. There are many individuals and institutions involved in 3D animations. There is also a growing interest in using 3D animations in various works...”

IDI/AFYATOON, (2024)

3.3. Business Development and Support of Animation Industry in Tanzania

Tanzania’s animation industry is an emerging part of the creative economy, with rising demand for both local and international content. To support its growth, there is a need to strengthen business structures, improve access to funding, and expand production capacity. This section examines the financial environment, structural challenges, and strategies for building a sustainable and competitive industry.

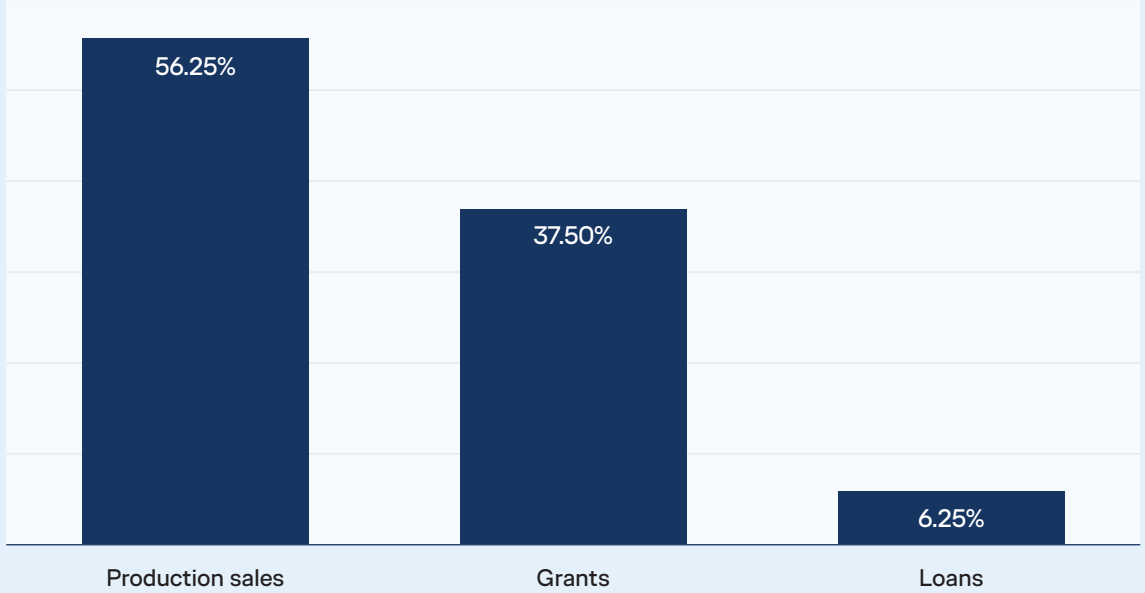


3.3.1. Financial Support

Moreover, during an interview with a representative from AFYATOON, it was noted that there is a growing number of people who are interested in the animation space. This signals that the industry is somewhat recognized not only for its entertainment value but also for its capacity to convey complex messages in an engaging and relatable format. This suggests a growing demand for locally produced, culturally relevant animated content, which could Access to financial resources remains a critical factor influencing the growth and sustainability of the animation industry in Tanzania. Financial support affects the ability of animation studios and individual creators to invest in equipment, training, and content development.

The majority of respondents (56.25%) rely on production sales such as client commissions and content monetization as their main funding source, indicating a project-based, small business model. Grants support 37.5%, typically from NGOs or development partners, though their short-term nature limits sustainability. Only 6.25% access loans, reflecting low engagement with formal financial systems. Overall, funding remains fragmented and informal, highlighting the need for targeted financial support and increased access to credit for the animation sector.

Figure 3: Source of Funding



Again, the survey assessed the level of financial accessibility. Based on survey responses from stakeholders within the industry, financial accessibility is generally limited. Only 12.5% of respondents reported that financing is very accessible, while 31.25% found it somewhat accessible. Another 31.25% of participants remained neutral, suggesting uncertainty or variability in financial support. However, a notable 25% indicated that funding is somewhat inaccessible, pointing to persistent challenges in securing reliable financial backing (See Table 4).

These figures reflect the broader issue of underinvestment in Tanzania’s creative sector, particularly in emerging fields such as animation. Most animators and studios rely on personal funds, ad hoc project grants, or sporadic support from NGOs and corporate clients. The lack of formal financing mechanisms such as targeted grants, creative industry funds, or animation-specific investment programs limits the ability of the sector to scale sustainably.

Table 4: Respondents’ Perceived Funding Accessibility

Accessibility	Counts = 16	Percent
Very accessible	2	12.5
Somewhat accessible	5	31.25
Neutral	5	31.25
Somewhat inaccessible	4	25

The above findings imply the existence of financial challenges for many animation creators in Tanzania. The financial challenges were equally observed during qualitative interviews with animation studios. The production is inherently time-consuming and labour intensive, often requiring a team of skilled professionals working over extended periods to produce high-quality content. However, studios frequently operate with limited financial resources, making it challenging to maintain production standards or scale their operations. This financial strain is compounded by clients’ misconceptions regarding the cost of 3D animation. As noted during a key informant interview with AFYATOON.

“... Animation creation is time-consuming and requires a lot of people. Funding is insufficient, and clients often perceive 3D animations as cheap, leading to financial challenges....”
IDI/AFYATOON, (2024)

These challenges discourage investment in the medium and contribute to instability within the sector. Addressing these financial constraints will require both awareness-raising about the true value and complexity of animation work, and the development of support mechanisms such as grants, subsidies, or client education to ensure sustainability.

3.3.2.1. Supply Demand Analysis

The Tanzanian animation industry currently exhibits high demand but limited supply. Demand is driven by various sectors including education, non-governmental organizations (NGOs), entertainment, advertising, and digital marketing. Clients increasingly require localized, engaging content for outreach and awareness campaigns. Additionally, the rise of digital platforms and mobile usage has created a wider audience base for animation, particularly among youth and children.

However, supply remains constrained by a shortage of trained professionals, limited infrastructure, and funding challenges. The majority of animators operate independently or in small teams, which restricts their ability to meet large-scale or rapid production needs. Studios are few, and many rely on basic tools and personal networks for production and distribution. This imbalance between demand and supply presents both a challenge and an opportunity for investment, training, and infrastructure development.

3.3.2.2. PESTEL Analysis

A PESTEL analysis provides a structured framework to examine the external macro-environmental factors influencing the development and sustainability of Tanzania’s animation industry. These include Political, Economic, Social, Technological, Environmental, and Legal dimensions that collectively shape the opportunities and constraints facing the sector.

Political

The Tanzanian government increasingly supports the creative economy for its role in development, employment, and youth empowerment. However, animation remains overlooked in policy frameworks. Despite political stability fostering a good business environment, there are no targeted incentives for animation start-ups. The lack of a national strategy for digital arts limits support for studios and freelancers. Animated films follow the same licensing as live-action, but without tailored guidelines, animators face creative constraints and potential political risks such as censorship and bans.

Action Point

To unlock the full potential of Tanzania’s animation industry, the government should establish a specialized policy framework and support system tailored specifically for animation and creative digital arts.

Economical

Economically, the creative sector contributes modestly to Tanzania’s Gross Domestic Product (GDP), but it holds untapped potential. The country’s steady economic growth and rising internet penetration have expanded digital media consumption, creating a larger audience for animated content. Despite this, access to capital remains a major challenge, particularly for small studios and independent animators. Many creators depend on self-funding or donor-supported projects, as traditional financial institutions often do not recognize animation as a viable business model eligible for loans or investment.

Action Point

Animators should actively pursue seed funding and engage in financial mobilization efforts such as pitching to investors, applying for grants, and forming partnerships to overcome capital barriers.

Social

Tanzania’s youthful and increasingly digitally literate population provides a strong consumer base for animation. Social issues such as education, entertainment, artwork, cultural and public health are frequently addressed through animated storytelling, especially by NGOs and development organizations. This trend demonstrates the industry’s social relevance and versatility in driving behavioural change in an engaging creative, entertaining and culturally appropriate format. Additionally, the growing use of Kiswahili and local languages in animated content increases accessibility and relatability.

Action Point

Support the growth of diverse, locally rooted animated content by investing in both socially driven and artistically independent productions encouraging storytelling that combines cultural relevance, creative freedom, and high aesthetic value.

Technological

Technological advancements have significantly lowered barriers to entry in animation production. Access to digital design tools, animation software, and online learning platforms has empowered many Tanzanian creators to develop skills and produce content independently. However, access to high-end technology and stable internet infrastructure remains inconsistent, especially outside urban centres like Dar es Salaam. These disparities can limit the scalability and quality of production across the country. Moreover, outdated hardware and pirated software are still common among small studios due to cost constraints.

Action Point

Enhance equitable access to modern animation technology, including AI-powered tools. Leveraging AI can boost productivity and creativity, helping small studios and independent animators produce higher-quality work and scale their operations effectively.

Environmental

While environmental factors may not directly impact the technical operations of animation, they influence content themes and partnerships. Climate change, conservation, and sustainability are increasingly incorporated into animated media, particularly in collaborations with NGOs, schools, and awareness campaigns. This alignment with environmental advocacy offers new content opportunities and funding avenues. Additionally, the digital nature of animation supports low-carbon creative practices, which may appeal to environmentally conscious stakeholders and funders.

Action Point

Leverage the environmental relevance of animation by promoting content that addresses climate and sustainability themes, while positioning the industry as a low-carbon creative sector opening doors to partnerships, funding, and audiences aligned with environmental advocacy.

Legal

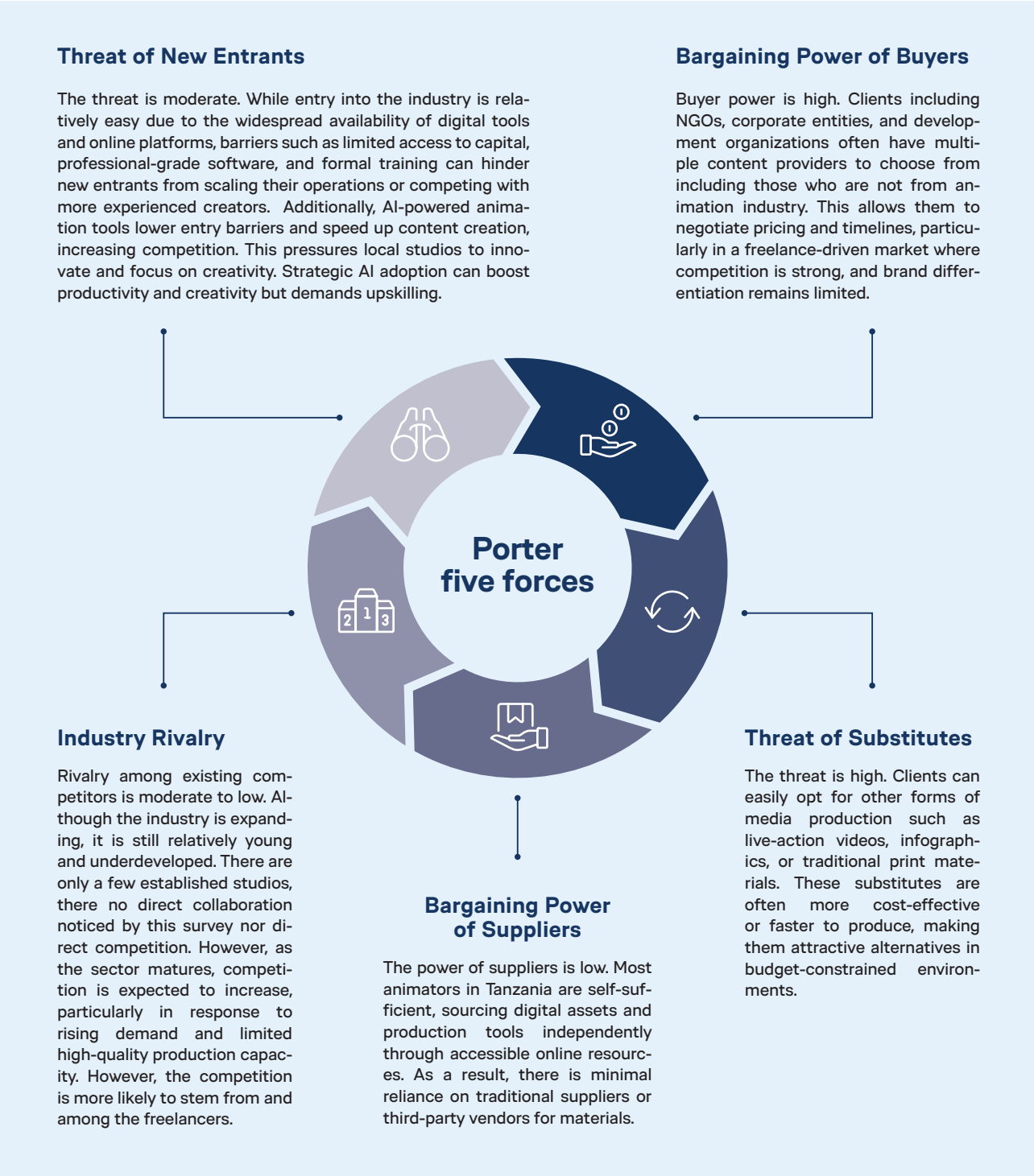
Intellectual property (IP) protection is a critical issue for the animation industry. Although Tanzania has IP laws in place, enforcement remains weak, and public awareness of creators’ rights is limited. This environment discourages some animators from widely publishing original content, especially online, due to concerns over piracy and unauthorized use.

Action Point

Strengthening IP regulations and enforcement mechanisms to protect the rights of animators and studios. This will build creator confidence, reduce content piracy, and encourage greater investment in original, high-quality productions. This, in turn, can stimulate innovation and promote sustainable industry growth.

3.3.2.3. Porter’s Five Forces Analysis

An application of Porter’s Five Forces model provides a structured framework for analyzing the competitive dynamics and strategic positioning of the Tanzanian animation industry. By examining the key external forces that influence profitability namely the threat of new entrants, the bargaining power of suppliers and buyers, the threat of substitutes, and industry rivalry stakeholders can better understand the challenges and opportunities shaping the sector’s development. This analysis helps identify where competitive pressures are strongest and where industry players can differentiate themselves to achieve long-term growth and sustainability.



3.4. Expertise and Experience of Animation Industry in Tanzania

This section presents an analysis of the expertise and experience levels within Tanzania’s animation industry. It provides insights into the distribution of professional experience and identifies the primary skill development needs based on responses from industry practitioners.

3.4.1. Working Experience in the Animation Workforce

Based on the data collected from industry respondents, a significant portion of animators (51.61%) reported having between one to three years of experience in the field. Approximately 29.03% indicated four to six years of experience, while only 6.45% have more than six years of industry engagement. In contrast, 12.9% of respondents have less than one year of experience (See Table 5).

This suggests that while the industry is growing, it remains relatively young and underdeveloped in terms of professional expertise. The small number of highly experienced professionals underscores the need for structured capacity-building and mentorship programs to facilitate knowledge transfer and professional advancement.

Table 5: Working Experience of Animation Workforce

Years of experience	Counts	Percent
Less than a year	4	12.9
One to three years	16	51.61
Four to six years	9	29.03
More than six years	2	6.45

The Tanzanian animation industry is dominated by early-career professionals, with most practitioners possessing less than six years of experience. While basic skills in storytelling and design are present, there is a clear lack of advanced and expert-level competencies, particularly in areas such as sound design, product management, including full-cycle animation production from concept to distribution.

3.4.2. Skills and Development Needs of the Animation Workforce

Respondents were also asked to self-assess their skill levels in key areas related to animation production. The skill categories assessed included concepting, storytelling, drawing, design, animating, product management, and sound design. The assessment of technical and creative skills in the industry reveals mixed levels of proficiency, with several areas indicating strong needs for development.

The data indicate that concepting and storytelling are relatively welldeveloped skills, with most respondents reporting at least average proficiency. However, expert-level mastery remains limited in all skill areas. Drawing and animating show more variation, with notable portions of respondents still at low or basic proficiency levels. Design, while widely practised, has no respondents reporting expert-level skills.

The most critical gaps are evident in product management and sound design. Product management is essential for leading animation projects and coordinating teams, yet 37.93% of respondents identified themselves as having low competency in this area. Even more concerning is the lack of expertise in sound design: over 90% of respondents reported only low or basic skill levels, and none reported expert proficiency. Refer Table 6

Table 6: Skills and Development Needs of the Animation Workforce

Low	Basic	Average	Advance	Expert	Percent
Concepting	6.45	22.58	41.94	22.58	6.45
Storytelling	6.45	16.13	45.16	29.03	3.23
Drawing	25.81	25.81	25.81	12.90	9.68
Design	6.45	25.81	54.84	12.9	0
Animating	23.33	10.00	30.00	26.67	10.00
Product management	37.93	13.79	24.14	6.90	17.24
Sound	35.48	58.06	3.23	3.23	0

The qualitative data revealed that the animation industry in Tanzania faces critical challenges when it comes to skills. It was noted that the industry has a shortage of highly trained professionals with specialized expertise in animation. During one interview with a representative from AFYATOON, it was observed that most animators currently working in the field have backgrounds in broader multimedia programs rather than formal animation training. This gap in specialized education often forces studios to rely on internal, on-the-job learning to build technical capacity.

“...There are not many highquality animators in Tanzania. Most animators have been trained in broader programs and lack a strong background in animation. The current team at AFYATOON has learned on the job using unfamiliar software...”
IDI/AFYATOON, (2024)

To support the continued growth and sustainability of Tanzania’s animation industry, targeted investment and strategic development are essential. Addressing current gaps in skills, mentorship, and technical resources will not only enhance productivity but also position the industry for longterm success in both local and international markets. Several studios have championed to provide capacity buildings for instance, during an interview with a representative from OnaStories the following was captured to reflect on capacity-building initiatives.

“...OnaStories has successfully empowered young people from Kenya and Tanzania, aged 18-29 The youth from Kenya formed the SEED Group, which now owns its resources and engages in independent work5. OnaStories provides them with space, resources, and encouragement to help them grow...”

IDI/OnaStories, (2024)

3.5. Projected Outlook for the Animation Industry in Tanzania

The animation industry in Tanzania is poised for substantial growth, driven by increasing interest from both content creators and consumers. While the sector is still in its early developmental stages, recent trends suggest a growing recognition of animation as a viable medium for education, entertainment, and cultural storytelling.

3.5.1. Growth and Opportunities

The potential for growth in Tanzania’s animation industry is regarded as highly promising by key stakeholders. A survey conducted among industry participants reveals strong optimism for the sector’s future: 70.97% of respondents view the outlook as positive, 22.58% as somewhat positive, and only 6.45% maintain a neutral stance on prospects. These figures highlight a clear consensus among professionals that the industry is on an upward trajectory.

Table 7: Perception of Future Outlook of Animation Industry in Tanzania

Perception on growth and opportunities	Counts	Percent
Positive	22	70.97
Somewhat positive	7	22.58
Neutral	2	6.45

This prevailing sense of optimism is rooted in several observable trends. Notably, the emergence of new animation studios and the rise of independent animators are reshaping Tanzania’s creative economy. These creatives are increasingly harnessing the power of digital platforms, particularly social media, to promote their work, expand their audiences, and attract new clients. The accessibility of platforms such as YouTube, Instagram, and TikTok has allowed animators to bypass traditional media channels, thereby democratizing the distribution process and increasing the visibility of locally produced content. As one industry expert from OnaStories observed.

“...The animation industry in Tanzania is growing, with an increasing number of studios and animators. Social media platforms have been instrumental in sharing works and gaining exposure...”

IDI/OnaStories, (2024)

Moreover, animation is increasingly being recognized as a multi-functional communication tool, extending entertainment to serve impactful roles in health communication, educational outreach, and brand storytelling. Organizations like Ubongo Kids, Tai Plus and AFYATOONS are leading the way in this area by translating complex health information into digestible, animated narratives that are accessible to the general public. This innovative approach opens new avenues for cross-sectoral collaboration with fields such as public health, non-formal education, and advertising. The cross-disciplinary potential of animation presents unique opportunities for the industry’s future. As animation gains recognition as both a creative and strategic communication medium, demand is expected to grow not only from commercial entities but also from development organizations, academic institutions, and government agencies. These emerging opportunities, coupled with the energy of a youthful creative workforce and the rapid evolution of digital tools, underscore the industry’s readiness to expand and diversify.

3.5.2. Market Dynamics

3.5.2.1. Growth Drivers

The development of the animation industry in Tanzania is influenced by a complex interplay of enabling forces and persistent structural challenges. On one hand, the industry is benefiting from a wave of positive momentum driven by rising digital literacy, greater internet penetration, increased access to affordable creative tools, and a growing appreciation for visual storytelling across various sectors, including education, health, and entertainment. Emerging animation studios and independent animators are leveraging social media platforms and online learning resources to build skills, share work, and connect with audiences both locally and internationally.

Technological integration

Animation studios are increasingly adopting advanced tools such as artificial intelligence (AI), virtual reality (VR), and immersive media to enhance storytelling capacity. This technological advancement has allowed creators to explore new dimensions of visual communication and interactive content delivery.

Social media platforms

Digital platforms such as Instagram, YouTube, and TikTok have become accessible and impactful distribution channels. These platforms not only increase visibility but also foster engagement with potential clients and audiences.

Youth participation and training

Most studios have invested in building local capacity by empowering youth through mentorship, access to technology, and skill development. These grassroots approaches are fostering a new generation of Tanzanian animators who are better prepared to enter the creative economy.

Sector-specific demand

The demand for animated content is increasing in sectors such as health communication, education, and marketing.

Cultural storytelling

Local stories resonate strongly with Tanzanian audiences and offer a compelling way to preserve and promote cultural identity. Creative projects like “Utanzania ni Nini” produced by ONAStories and Harakati za Ngeti by Tai Plus serve as prime examples of how cultural narratives can drive both social impact and viewer engagement.

Art schools and academic programs

Tanzania currently lacks dedicated animation schools, but several institutions offer related training and could become key drivers of growth. The University of Dar es Salaam provides media studies, while TaS-UBa (Bagamoyo Institute of Arts and Culture) focuses on visual and performing arts. Dar es Salaam Institute of Technology offers programs in IT and media tech. Though animation-specific training is limited, short-term workshops, studio-led mentorships, and NGO-supported initiatives are helping to build foundational skills in the sector.

3.5.2.2. Growth Inhibitors

On the other hand, the ecosystem continues to face significant limitations that restrict its full potential. These include a shortage of formally trained professionals, inadequate access to high-performance hardware and licensed software, inconsistent funding opportunities, and limited institutional support. Additionally, societal perceptions that undervalue animation as a serious communication tool further hamper its integration into mainstream sectors. As a result, while the animation industry in Tanzania is steadily growing and showing signs of promise, its progression remains uneven and requires targeted interventions in policy, education, and investment to ensure sustainable and inclusive growth.

Lack of specialized professionals

Many animators enter the field with general multimedia backgrounds and minimal formal training in animation.

Limited access to resources

The availability of licensed animation software, powerful computing equipment, and stable internet remains limited. These deficiencies hinder both productivity and the ability to meet professional quality standards.

Funding constraints

Animation production is time-intensive and resource-heavy, yet financial support remains scarce. It was noted that some clients avoid 3D animation because they consider it expensive. This perception undermines the value of high-quality animation and discourages investment.

Perception barriers

There is still a tendency to prioritize more traditional media, such as live-action videos or printed materials, over animated formats. This results in fewer commissions for animation work and slows the industry’s mainstream acceptance.

Infrastructure limitations

Challenges such as inconsistent electricity and weak internet connectivity negatively impact the production process, particularly in areas outside of major urban centres.

Cultural Integration and Audience Engagement

Animation is not yet a mainstream artform in Tanzania, with limited local content and low cultural integration compared to other countries. Most viewers access foreign animation, while homegrown stories remain scarce. Still, increasing digital access presents a strong opportunity to build local audiences through culturally relevant productions.

CONCLUSION AND RECOMMENDATIONS

4.1. Conclusion

The Tanzanian animation industry is poised for growth, fueled by a youthful, tech-savvy population, rising internet and mobile penetration, and a growing appetite for digital content. The country’s rich cultural heritage and storytelling traditions offer animators a powerful foundation to create authentic, globally resonant content rooted in local narratives. Talented artists and storytellers are already emerging, bringing creativity and passion to the field.

While the industry is still in its developmental phase marked by a predominance of freelance work and a notable gender imbalance these challenges are not insurmountable. Structural hurdles such as limited access to advanced equipment, a shortage of trained professionals, and insufficient institutional support remain. However, with the right investment in training, infrastructure, and inclusive policies, these gaps can be bridged. The momentum is building, and with collaborative effort, Tanzania’s animation sector has the potential to thrive both regionally and globally.

4.2. Recommendations

Based on the key findings presented and the conclusions drawn from this study, the following recommendations are proposed to support the growth and development of the animation industry in Tanzania. These recommendations aim to address the identified challenges, leverage existing opportunities, and guide stakeholders such as policymakers, educators, investors, and creative practitioners toward building a more vibrant and sustainable animation ecosystem.

Increase Formal Training Opportunities

Establish specialized academic programs and vocational training centres focused on animation to address the skills gap and provide structured education for aspiring animators and producers of animated content in diverse formats and for diverse target groups.

Establish producer- and business developer training

Develop business training programs for animation producers and entrepreneurs to enhance their ability to create and grow a market for animated property. Build investor networks: Organize annual networking events showcasing new animation ideas to invited investors, broadcasters, and publishers from the East African region.

Promote Gender Equity

Implement initiatives to encourage more women to enter the animation industry, such as scholarships, mentorship programs, and awareness campaigns.

Enhance Infrastructure and Access to Equipment

Invest in high-end animation equipment and software to improve production quality and efficiency. This could be achieved through public-private partnerships and government subsidies.

Strengthen Institutional Support

Develop policies and frameworks that support the growth of the animation industry, including financial incentives, grants, and subsidies for animation studios and freelancers.

Foster Collaboration and Networking

Encourage collaboration between animation studios, freelancers, and educational institutions to share resources, knowledge, and expertise. This could include industry conferences, workshops, and online forums. We also recommend cross-border collaboration and networking at East African, Pan-African, and global levels to expand opportunities, foster innovation, and build a more interconnected animation ecosystem.

Expand Financial Support

Increase access to funding through targeted grants, creative industry funds, and animation-specific investment programs. Educate clients about the true value and complexity of animation work to ensure fair compensation.

Leverage Technological Advancements

Utilize emerging technologies such as artificial intelligence (AI), virtual reality (VR), and immersive media to enhance storytelling capacity and explore new dimensions of visual communication.

Promote Cultural Storytelling

Encourage animators to develop authentic, globally appealing stories rooted in local heritage. This can help preserve and promote Tanzanian culture while attracting international audiences.

Audience Development

Invest in strategies that cultivate a broader appreciation and demand for animation. This includes supporting local festivals, integrating animated content into mainstream media and streaming platforms, and implementing school and community-based engagement programs. These efforts can grow a vibrant audience base and deepen public connection to Tanzanian animation.

By addressing these recommendations, the Tanzanian animation industry can overcome its current challenges and achieve sustainable growth and success in both local and international markets.



