

Documentary Television Market: Current Analysis and Forecast (2025-2033)

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Abstracts

The Documentary television market is witnessing a steady growth rate of 7% within the forecast period (2025- 2033F). A documentary is a non-fiction film or web series, depicting real incidents, real people, and real problems, aimed to educate people and preserve history. Earlier, the documentaries were broadcast on television by the BBC, National Geographic, and the Discovery Channel. However, during COVID-19, the expansion of streaming platforms such as Netflix, Disney+, Amazon Prime, and Hulu altered the market scenario. As people were at home, the demand for authentic and educational content increased, which boosted the viewership of documentaries. For example, Netflix's 2020 documentary Tiger King became the most-watched documentary. Moreover, filmmakers and creators are highlighting issues, social justice movements, culture, and heritage of various communities and regions through documentaries. For example, a 2012 documentary, Deepsouth, highlights the HIV/AIDS problem, showcasing how poverty and lack of healthcare affected the rural area of South America. For instance, in January 2025, the Ford Foundation, an organization that provides grants for social welfare issues, funded USD 4.2 million for creating social-justice documentaries. Documentaries are not only a source of entertainment, but they also provide knowledge and awareness about certain issues in the world.

Based on type, the documentary television market is segmented into Historical, Social & Cultural, Nature & Wildlife, Science & Technology, and Others. In 2024, the social & cultural documentary television market dominated and is expected to maintain its leading position throughout the forecast period. The social documentary showcases issues regarding human rights, gender inequality, child labor, poverty, racism, and political concern. While cultural documentary highlights the diverse cultural practices. The blend of social & cultural not only highlights the social issues but also depicts how cultural factors are influenced

by those practices. For example, *Honeyland*, a Tubi platform documentary, shows human-nature relationships and rural issues through the real story of a beekeeper. 2015's Indian documentary *India's Daughter*, highlighting gender inequality, the mindset of people, justice, and concern for women's safety. Moreover, OTT platforms such as Netflix, Amazon Prime, and Hulu are prioritizing these genres due to public demand. For instance, in January 2025, the Nordic government, the Nordic film foundation, and the Nordic media channel made a funding deal for the Nordic Films and TV Fund (NFTVF) to enhance the quality of documentary series and films. Additionally, Sundance Institute also provides grants for socio-cultural documentaries.

Based on the distribution platform, the documentary television market is segmented into Television, Streaming Platform, Theatrical Release, and Others. The streaming platform held the largest market share in 2024. The streaming platform provides on-demand access to films, documentaries, and series through the internet. People can watch documentaries, films, or series according to their convenience and time, unlike broadcast channels, which provide a schedule for shows. OTT platforms provide access to on-demand user content through a subscription-based model, an ad-supported model, and a freemium model, ensuring global reach. The catalogue offered by these platforms includes social & cultural, history, nature & wildlife, and others. Further, the recommendations algorithm also ensures visibility to niche documentaries, user engagement, and global reach of the content. Additionally, the pandemic boosted the growth of streaming platform performance. During the lockdown period, people were stuck at home, and the demand for on-demand and authentic documentaries increased, which increased the viewership of documentaries. For example, Netflix's 2020 documentary *My Octopus Teacher* became the most-watched documentary. For instance, major platforms such as Netflix, Amazon Prime, Disney+, and Hulu are largely investing in the documentary section, collaborating with filmmakers, and funding to produce high-quality content.

Based on length, the documentary television market is segmented into Feature-Length Documentary, Short-term Documentary, and Docuseries. In 2024, the feature-length documentary dominated the market and is expected to maintain its leading position throughout the forecast period. Such a documentary allows filmmakers to explore topics in depth, which helps them tell better stories. This format has further gained global attention, as major awards such as the Oscar, Emmy Award, and BAFTA majorly recognize feature-length work. For example,

Honeyland, Children of Pyre, and Writing With Fire are award-winning documentaries. Moreover, OTT platforms are investing in feature-length format due to large user engagement rates and global recognition. For instance, organizations such as Ford Foundation and Sundance Institute invest largely in lengthy documentaries, as they tend to provide information clearly and deeply, beneficial for the social-cultural documentary.

Based on audience, the documentary television market is segmented into General Audience, Academic, Industry Professional, Niche Audience, and Others. In 2024, the general audience segment dominated the market and is expected to maintain its leading position throughout the forecast period. This is due to the general audience seeking content from which they get entertained, gain knowledge, and awareness. Topics such as human rights, crime, and social and cultural diversity are the most popular among the daily non-fiction viewers. Streaming platforms provide access to all such topics. Their recommendation system also provides documentaries on such content to such a large number of users. Furthermore, streaming platforms are now focusing on creating and promoting documentaries on these topics, aiming to gain viewers' attention, generate revenue through large viewership, and increase subscriptions. For example, American Factory is a mixture of cultural diversity, globalization, and labor rights. While India's Daughter highlights the gender inequality and women's safety. Both documentaries gained massive viewership globally. This reflects the rising demand for documentaries that entertain as well as provide social awareness among the general audience.

For a better understanding of the market of the documentary Television market, the market is analyzed based on its worldwide presence in countries such as North America (The US, Canada, and Rest of North America), Europe (Germany, The UK, France, Italy, Spain, Rest of Europe), Asia-Pacific (China, Japan, India, South Korea, Rest of Asia-Pacific), Rest of World. The North America documentary television market dominated the global documentary television market in 2024 and is forecasted to remain in this position in the forecast period. The region is a pool of talented filmmakers, companies, and studios. The distributive network ensures the global reach of content. Additionally, in major awards ceremonies and film festivals such as the Academy Awards (Oscars), Emmy Awards, the Toronto Film Festival, and the Sundance Film Festival, the region received awards for its documentaries, gaining global recognition. Documentaries such as American Factory, Blackfish, The Cove, and An Inconvenient Truth not only generated revenue and gained

global viewership but also boosted the region's soft power. Organizations funding such as the Sundance Institute, the MacArthur Foundation, the Ford Foundation, the Tribeca Film Institute, and ITVS Funds are financially helping filmmakers and independent creators to create documentaries.

Some of the major players operating in the market include Public Broadcasting Service (PBS), Apple Inc., Netflix, BBC Studios, Amazon.com, Inc., Sony Pictures Digital Productions Inc., Home Box Office, Inc., Comcast, National Geographic Partners, LLC., and A&E Television Networks, LLC.

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