

Natural Order: Distribution Trends

From exploring the burgeoning FAST landscape to managing the complexities of financing increasingly ambitious premium docs, leading distributors weigh in on trends shaping the factual business today.

Producers of non-scripted television are, by default, infinitely adept at problem-solving and adapting when circumstances change. And things have been changing rather rapidly. Just over a year ago, the industry was buzzing with the potential new opportunities brought forth by CNN+, a brand-new entrant with a global remit and ambitious content plans. The service went live at the end of March 2022 and was shuttered in a month amid a series of strategy shifts at the new Warner Bros. Discovery. In the ensuing year, there have been lots of unanswered questions about the content approach at the merged HBO Max/discovery+ service—the recently launched Max—and indeed at all the streamers as everyone’s strategies appear to be in transition. Broadcasters, meanwhile, are having to make their own adjustments as they face down what looks to be a challenging year on the advertising front. What hasn’t changed, the distributors surveyed for this state of the industry report indicate, is the ever-present demand for unique access, pristine visuals and revelations.

“With more broadcasters and platforms popping up worldwide, we’re really in a golden era for docs and factual content,” observes Anne Olzmann, managing director of Albatross World Sales. “This can also be observed in the ongoing merger and acquisitions movement in the market, which doesn’t stop but rather embraces factual.”

Nikolas Huelbusch, Director Unscripted at **ZDF Studios**, adds: “Many major broadcasters and streamers are trying to find their own niche with originals, specific styles, approaches, brand-building and faces unique to the respective service. There is still an enormous need for carefully crafted, well-researched, narration-driven specialist factual series and one-offs. Visually strong and inspiring history, science and wildlife programs with some surprising ‘watercooler knowledge’ are an evergreen genre that will probably always find its audience worldwide.”

Holly Cowdery, head of sales at BossaNova Media, has witnessed “a huge swing toward premium docs with unique, high-quality storytelling. It’s an all-encompassing area, but where we are focusing on in particular is the crime and ‘stranger-than-fiction’ space, where we’ve had great success with *Con Girl*. We do still seek to work across all forms, though, with returning brands such as *Borderforce USA* and exciting one-offs on a broad range of subjects. In terms of the business, it’s great to see new factual channels still being launched, like Foxtel’s *Real Life in Australia*. A very encouraging sign, if we needed one!”

STORIES THAT MATTER

Natalie Lawley, managing director of Escapade Media, is also bullish about the sector. “Escapade has seen a noticeable growth in documentary sales over the past 12 months, which applies to both one-offs and series,” she notes. “There is still a really solid market internationally for well-made local content that resonates with the international audience.” For Escapade, there has been interest from buyers in documentaries that offer a “sincere and genuine insight into ‘new’ subject matters but that are about topics that different territories can relate to.”

Olzmann at Albatross sees a move toward “more innovative and emotionally engaging storytelling techniques, leveraging the latest filmmaking technology and approaches to provide audiences unique and compelling viewing experiences. Especially when it comes to wildlife films, we observe a focus on the intimate and emotional stories of individual animals rather than just presenting a broad overview of a particular species or habitat. It could be described as character-driven, though it has to remain scientifically accurate at all times, which can be tricky. But it seems to be working well with the audience and can be a great tool to get the viewer emotionally engaged.”

Huelbusch reports that **ZDF Studios** is experiencing strong demand for shows that allow audiences to discover parts of the world “underrepresented in documentary filmmaking in the past,” citing the unique perspectives presented by *Africa from Above*. In **ZDF Studios’** other core focus of history, meanwhile, “there is a big appetite for rediscovering archive-driven programs, especially if the archive is technically restored, brushed up or colorized, thus bringing history to life again for new generations of viewers.” He cites as examples the World Media Rights series *Greatest Events of World War II in Colour* and *WWII in Colour: Road to Victory*, both co-produced by Netflix.

NHK Enterprises, the commercial arm of broadcaster NHK, has been rolling out doc specials and series that showcase new perspectives on Japanese culture and society, such as *ISSEY MIYAKE: The Human Inside the Clothes*, about the acclaimed fashion designer, and *Not Yet There*, on chef Ishihara Hitoshi.

TITLE HUNTING

NHK Enterprises and **ZDF Studios** benefit from being affiliated with broadcasters that continue investing in high-end doc fare, enabling a steady supply of content for the global market. **ZDF Studios** also partners with third-party producers, focusing on titles that fit into the company’s core factual genres of history, science and wildlife and, crucially, feature a “global approach,” Huelbusch says. That generally means “no host and not too much on-site dialogue, which might be difficult to localize. Producers should always ask themselves: Is this a program viewers in countries like Australia, Japan, Germany, Italy, Canada or Mexico would equally enjoy?”

Huelbusch continues: “We focus on 50 to 52 minutes lengths, one-offs, miniseries or longer series, mostly in an anthology style where each episode tells a different story. A track record of similar programs a production company has produced in the past is extremely helpful, as is a sizzle.”

At Albatross, Olzmann and her team are always seeking out new properties that deliver captivating images and narration, along with “new ideas regarding sustainability, environmental issues and inclusion, cutting-edge science as well as new historical insights and diverse and inspiring travel programming. We can work with projects as well as finished programs. In general, we evaluate the content and check whether it would fit our current content strategy and program needs. We’re looking for long-term partnerships built on trust with the goal of growing together. We explore the producer’s goal for the program and the best strategy to make that goal happen. Of course, we all want to make as much as possible from license fees. However, for some producers, it is more important to have as many public broadcasters as possible, while others just want to be everywhere, including online, quickly. We explore the ideal sales strategy together and see if it’s a fit for both of us.”

As for when a distributor should get involved in a project’s life cycle, the days of picking up fully funded completed projects are likely long gone. Asked how soon BossaNova tends to board projects, Cowdery notes, “Early—really early. That way, we can secure the funding and get a broadcaster on board that will editorially run the project rather than the distributor.”

As for what the independent outfit, founded by Paul Heaney and now part of the Night Train Media group, is looking for, Cowdery notes: “We’re still relatively new on the scene and feel it’s important to build a strong, balanced slate rather than rushing to form a mobbed library. Rather than being an opportunist and acquiring whatever is available, this helps us build a slate we believe in as we go to markets and sell, rather than employ a scattergun approach.”

And beyond a project’s core conceit and storytelling approach, the BossaNova team also focuses on a producer’s credentials. “We want a producer to communicate freely and easily with us through the process, to deliver on time, on budget and on brief,” Cowdery notes.

Escapade, too, likes to get on board early, Lawley says. “We are happy to look at project concepts that may be simply just an idea or are further developed, but definitely before preproduction has started. It’s paramount that our projects appeal to the international marketplace, so we look to have input to ensure this is the case.”

At **ZDF Studios**, Huelbusch says the ideal time to partner with a producer is generally “when a large share of the financing is already in place via one or two broadcasters and/or film funding, and the last gap is to be filled. But we are happy to look at projects at earlier stages to give producers a first impression if something is generally in our ballpark.”

Olzmann says that the Albatross team prefers looking at projects that already feature a “detailed treatment and, if possible, a trailer. All the projects we take on have at least some financing in place, and it should be very clear what editorial angle the film will have. Depending on the finance gap, we can then work out a detailed strategy for each project individually.”

FAST TIMES

Given the investments distributors are making in shows, having a well-thought-through windowing strategy to maximize the return on investment is critical, and AVOD and FAST are an increasingly important part of that value chain.

“AVOD and FAST services are becoming a significant revenue stream for us,” Olzmann explains. “We have been working with different operators for quite a while now, and while it has taken some time to set up, it is becoming more and more lucrative each year, especially for titles that have made their TV round and are ready for third and fourth runs. We work with big AVOD and FAST platforms and small owned-and-operated channels, which is a good combination to generate feasible revenues. It is important for us to branch out and have multiple sources of revenue from each territory. It is safe to say that we have extended the shelf lives and have longer distribution periods for suitable genres, such as nature and wildlife, which don’t get old. With a well-working infrastructure in place, we will increase our AVOD and FAST business.”

Huelbusch is of a similar perspective on the increasingly lucrative AVOD business. “We collaborate with numerous platforms such as Pluto TV and Samsung TV Plus, licensing programs to their AVOD services, owned-and-operated FAST channels or entirely single IP channels, both in the German- and English-speaking territories, with other regions of the world envisaged for the near future. Our German-speaking Terra X channel on Samsung TV Plus is especially successful, building on a well-established ZDF factual brand. There’s more to come.”

BossaNova has its eye on the AVOD space but is taking a measured approach to the segment, Cowdery notes. “They are clearly having a growing influence and there are revenues available everywhere. However, we are being strategically minded and taking our time to do the right thing for our producers. The brands we are painstakingly building need to be protected and there is the fear of going FAST too quickly.”

Indeed, as Olzmann stresses, succeeding in the marketplace today requires a delicate balancing act between following trends and charting new ones.

“As a specialist factual distributor, we have to carefully navigate between following trends, increasing our catalog volume, and at the same time keeping our editorial angle tight to a great mix of strong storytelling and visually stunning productions. We keep an eye on trends, of course. Still, when it comes to acquisitions, we will always carefully evaluate whether it is in line with what we stand for: well-curated, premium content that creates added value for the viewers, offers new and different perspectives and encourages us to make the world a better place.”