

An ever-transforming landscape and audience

The reflection of production culture on the motivations of cinema attendance in The
Netherlands

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ABSTRACT

The cinema industry has known many hardships in its history with multiple fierce competitors forcing it to evolve regularly. In recent years, the cinema industry has once again been disrupted, this time by Video-On-Demand (VOD) platforms that have altered various aspects of the industry's production culture. By providing audience members with unlimited quality movies in their own homes, VOD platforms have become the main source for watching movies. Naturally, that is worrisome for the traditional sequential cinema distribution, which needs to adapt and innovate in order to retain consumers within the theatres. Therefore, it is essential to identify consumers' motivation factors to enhance them further. This study aims at answering the question 'How is the transforming film production culture in The Netherlands reflected in consumers' motivations for going to the movies?'

In this research, an original framework was conceptualised to understand the notion of production culture. It divided the concept of production culture into five dimensions: financial/state aid, regulations/government policies, cinema landscape, production and distribution landscape, and history and culture of films. This framework proved to be necessary to gather a complete understanding the Dutch film sector and its reflection on consumers' motivations. A qualitative thematic document analysis and thematic analyses of consumer interviews tailor made for this study were conducted. From the data, eight motivations for going to the cinema theatres emerged: experience, the content of the movie, technological appeal, movie genre, people involved, budget, theatre provider, culture in a movie. It also became apparent that some dimensions of production culture are more reflected in consumers motivations than others: cultural history, production and distribution landscape, and cinema landscape were most influential, while financing/state aid was scarcely reflected, and regulations/government policies was hardly echoed. These results suggest that by focusing on the three most important dimensions when innovating, the Dutch cinema industry remains competitive and relevant in the entertainment sector. There is still an added value to going to the cinema theatres, which has a clear potential to remain.

KEYWORDS: *Production culture, Consumer motivations, Cinema industry, The Netherlands, VOD platforms.*

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1. Introduction

The following chapter of this master thesis is an introduction to the topic under study. First, the premise of the research is set up (1.1), followed by the statement of the research question (1.3), the academic relevance (1.4), the relevance to the industry and society (1.5), and finally, the chapter overview of the entire study (1.6).

1.1 Premise of the research

In 1895, the Lumière brothers created cinema by showing, for the first time, to a paying audience, the sequence *La sortie de l'usine*. In The Netherlands the first movies also appeared as early as in 1895 (Jess, 2018). Over the past 125 years, the Dutch cinema industry has vastly developed, domestically as well as internationally, exploring various genres such as documentaries, one of the country's specialties (Jess, 2018). The Netherlands has also highly developed its cinema industry by focusing on film festivals. The International Film Festival of Rotterdam (IFFR) is one of the biggest B festivals, which is the second category of most influential film festivals in the world (<https://iffr.com/en/who-we-are>) and the International Documentary Film Festival of Amsterdam (IDFA), one of the top 10 most important documentary festivals in the world (<https://www.idfa.nl/en/info/mission-statement>). Both of these festivals focus on providing the public with high-quality films, favour creativity, and overall enable the launch of many careers and films, illustrating that despite the small size of both the country and its cinema industry, The Netherlands is relevant on the international scene.

However, the global rise of the popularity and demand for films did not come without its challenges (Kerrigan, 2017). With many competitors along the years, notably TV, DVDs, VHS tapes, Blue Ray, illegal downloading and in more recent years Video-On-Demand (VOD) platforms, the cinema industry has had to adapt and evolve many times throughout its history to remain on the forefront of the entertainment industry (Rubin, 1981; Nelson & Rutherford, 2010; Hill, 2007). Notably, the creation of big multiplexes is providing the public with a premium experience (PWC, 2019). This is why experience enhancing technologies are being integrated into the production of movies (Hubbard, 2003). For instance, theatres are increasingly being restored, and investments are being made to install IMAX sound systems,

Screen X rooms, 4DX screens, and 4DM seats and 3D technologies (PWC, 2019). Finally with the creation of new loyalty programmes such as the Pathé unlimited cards and the Cineville passes, cinema theatres bet their revenues no longer on ticket purchases to the movies but rather on goods consumed within the theatres such as beverages and snacks, whose prices were ostensibly raised over the years (Smart Pricer, 2018). Furthermore, to compete more forcefully with VOD platforms, traditional theatrical companies are entering the VOD market, with notably the Pathé chain in The Netherlands developing the Pathé Thuis platform (PWC, 2019).

By increasingly investing in domestic content production, VOD platforms present a threat for the traditional domestic theatrical releases (Brooks, 2019). The money gathered from the monthly subscriptions of consumers does not go to the traditional shareholders and makers of the cinema industry but rather stays within the VOD companies themselves, financing their original content (Kannisto, 2019). In other words, VOD platforms are now becoming high competitors on both the exhibition level as well as the production level. Naturally, these changes within the industry bring about the questions of how things are working now in the theatrical sector and how the Dutch traditional theatrical industry is attempting to compete on the domestic level aside from battling on the VOD market front.

In this competitive environment, the movie industry is adopting various content strategies to attract audiences to movies theatres. In this prospect, popular blockbusters (Elberse, 2013) with popular celebrities (Elberse, 2007), genres such as rom-comedy, and action movies (de Best, 2019), as well as movies cultivating various fandoms (Henkel, James, and Croce, 2015) are increasing. Likewise, on the domestic level, governments are increasingly supporting the overall quality of movies by encouraging film adaptations of books, biopics and historical pieces (Liu & Yao, 2019). The appeal for cultural content explains why more and more Dutch productions are made to (supposedly) Dutch consumers with identifiable elements of their culture and history (Schäler, 2003). But how do these domestic productions compete with Hollywood blockbusters, and are domestic productions of sufficient quality to attract people to the cinema theatres?

Therefore, one may wonder how all these changes and the multitude of VOD platforms affect the movie consumers. Understanding the various surviving strategies of the theatrical industry in The Netherlands might help to set a broad groundwork to gather insights on why people attend movie theatres despite competitive forces in the

entertainment sector in the form of VOD platforms (Savage, 2014). In other words, the cinema industry knows an evolution within its production culture. However, it remains unclear how it truly affects the Dutch consumers. One may ask “how are tensions, innovations, and overall transformation within the industry perceived by and integrated into the consumer behaviour of the audience members?”.

1.2 The research question

As the cinema industry is trying to remain competitive, it is essential for them to understand the motivations of their audiences for going to the movies. Questions such as ‘how aligned are the demands and expectations of consumers with what is currently being done within the industry?’, ‘why do people keep on going to the theatres when they can simply stay in the comfort of their own houses?’ and ‘what might motivate consumers to go to domestic movies over the popular high budget blockbusters coming from Hollywood?’ may be raised. Through this line of questioning, it appears that a research might be worth conducting to gather a better understanding of both the recent evolution of Dutch cinema production culture and the drive for consumers to still go to the cinema theatres combined with their selection process when picking a movie. Therefore, this master’s thesis will focus on answering the research question *How is the transforming film production culture in The Netherlands reflected in consumers’ motivations for going to the movies?*.

To answer this question, the numerous innovative strategies that make for the adaptive quality of the cinema industry must be analysed. They operate on the five different dimensions of production culture: financial/state aid, regulations/government policies, cinema landscape, production/distribution landscape, and history and culture of films. They must then be compared to the consumer’s motivations to draw conclusions.

1.3 Academic relevance

Academically, it is interesting to target The Netherlands, as there is a lack of research on the Dutch cinema industry done in the English language and therefore accessible to the rest of the world. Rather, most studies on film focus on Hollywood or on big major players of the global cinema industry such as France in Europe or India in Asia. Kumb, Kunz, and Siegert (2016) highlighted that most studies regarding the field of cinema target the United States’ system, often forgoing other markets entirely.

Furthermore, they state that academic research on the topic of the film industry is usually primarily focused on theatrical releases despite the continuous growth of other release windows such as VOD platforms, home videos, smart TV and mobile devices (Kumb, Kunz, & Siegert, 2016). Other researchers notice that often, previous research has measured the motivations behind consuming movies illegally as opposed to legally (Henkel, James, & Croce, 2015). However, illegal downloading has now largely been replaced with VOD platforms. While the growth of this new viewing technique has been covered, it seldom mentions what the motivations of consumers for still going to the movies are (Behrends & Fischl, 2005; Daidj & Vialle, 2007). Therefore, the following study is filling a gap in the academic understanding of the Dutch cinema industry and the audience's motivations for going to the cinema theatres.

Finally, it can also be argued that some methodological pragmatism is applied in the choice of the European nation to study, as the researcher lives in The Netherlands and has, therefore, an easier access to the population of the country, a matter that proves to be relevant when it comes to the data collection. It also presents the advantage of a more intimate understanding of the culture as well as the ways of thinking and expressing oneself in The Netherlands, which proves to be necessary during the analysis of the data.

1.4 Relevance to the industry and society

Studying this industry is important for the Dutch market as many criticise it for having a very Americanised filmography (Segers, 2009). Not only is there a tremendous amount of Hollywood imported movies displayed in Dutch theatres, but also domestic content tends to be highly based on what may be found in Hollywood productions (Segers, 2009). Some attribute this fact to one of the reasons for testing the Disney + platform within the Dutch market before its international release: The Netherlands may be considered as a small United States consumer culture-wise (Roxborough, 2019). The main cinematic similarities between the two markets lie in their appeal for blockbusters (Elberse, 2013), and their production style (Dibbets & van Oort, 2009). However, it is undeniable that some domestic movies in The Netherlands have been successful, henceforth contradicting the suggestions that Dutch movies are not as good or do not have the potential for success that Hollywood movies do. In recent years titles such as *'Gooische Vrouwen'*, *'Alles is liefde'*, and *'Penoza: The final chapter'* have been tremendously successful in The Netherlands.

Identifying the reasons for these successes may prove to be useful for the Dutch cinema industry as a whole. Indeed, by identifying elements of success and popularity within Dutch movies, a better understanding of the Dutch audience and what they value is gathered.

Understanding the Dutch film industry and its attraction to consumers is of prime importance for business, policy makers and professionals of the cinema industry as well as the Dutch government. Indeed, understanding better the demands and expectations of the Dutch audience for films may allow professionals of the industry to create an interesting and well targeted selection of movies, providing a better source of entertainment. Furthermore, it might shed light on the relevance of the current government investments in the domestic film sector. This may prove to positively impact the film festival industry as well renew the domestic movie industry. As many criticise Dutch movies for their lack of authenticity and overall low quality, improving the Dutch domestic cinema is essential to avoid the threat of an Americanisation of the Dutch culture (Segers, 2009).

1.6 Chapter overview of the entire study

It is hard to comprehend to what extent the film industry in The Netherlands is being altered by all the recent transformations of production culture, and how it impacts the audience members. To shed light on this, the research question *How is the transforming film production culture in The Netherlands reflected in consumers' motivations for going to the movies?* is set. The following study is composed of 5 chapters, namely this introduction (1), a theoretical framework (2), a methodology (3), a result report (4), and finally a conclusion and discussion section (5). In the theoretical framework, an understanding of the contextual characteristics of the cinema industry and the established motivations of consumers is obtained by analysing and discussing previous academic research to establish a framework of research for this study. The methodology chapter explains why a qualitative research method is used in this study and justifies the choices of conducting a thematic analysis of both a document analysis and interviews. The result chapter is a presentation of the various themes identified in the data as part of the five dimensions of production culture. The identified themes are consumer's experience, appeal of Dutch movies, movie content, technological appeal, VOD competition, marketing of a film, movie genre, people involved in the making of a movie, theatre providers, production budget, financing a film, regulations, and finally, government policies. These themes are put into perspective with

regards to the previously exposed academic theory and the divergence or convergences of opinions between the professional and the consumers. Finally, in the conclusion chapter, a concrete answer to the research question is summarised, the implications for theory/academia are considered, the implications of the findings for the cinema industry are discussed, and a reflection on the limitations of the study and directions for future research are given.

2. Theoretical framework

This section aims at establishing a theoretical lens through which the research question *'How is the transforming film production culture in The Netherlands reflected in consumers' motivations for going to the movies?'* may be understood, provided with meaning and reflected upon. This is achieved by first focusing on the contextual characteristics of the cinema industry (2.1), namely new competing needs (2.1.1) and technological advancement (2.1.2), followed by an analysis of and discussion based on previous research on the transforming production culture (2.2). This discussion then leads to the establishment of a framework of research for this study (2.2.1 to 2.2.5). Finally, this chapter ends on a section dedicated to the audience's motivations for movie attendance as established by previous research (2.3).

2.1 Contextual characteristics of the cinema industry

Since the Lumière Brothers in 1895, the concept of cinema has expanded and become a popular entertainment industry, worldwide (Nowell-Smith, 1996). Indeed, while the first films were originally shown in fairs and hence meant for entertainment, movies are now being displayed in official theatres and big multiplexes. Besides the size of the rooms and the length of movies produced, commercial goods accompany the cinema experience. Typically, the consumption of popcorn has entered cinema theatres and has been associated with movie watching (Englander, 2012). Popcorn, along with many other snacks and beverages plays an important role in the theatres' revenues. For this reason, they are often listed among the competing advantages of watching a movie in the theatres (Mazdon, 1999).

Competing for the audience's attention is essential in any form of business, however, this is a specifically hard task in the entertainment industry, in which innovations are often multi-platformed and where the evolution process is visible at every step (Dogruel, 2014). This is especially true of the film industry. Technological advancements and notably the spread of Internet access within most households, have enabled the rise of important competitors for the traditional cinema theatres (Kumb, Kunz, & Siegert, 2016). In the following section, the competition context within the film industry will first be

discussed, before targeting the technological advancements that the cinema industry has to develop to avoid becoming obsolete.

2.1.1 Competing needs

Among the most important technological disruptions that have become problematic for the cinema industry, is television. While before people had to obtain their news through radio or journal papers, the invention of cameras allowing for the recording of moving images opened many doors. Television was not only used as a means of information but also as a prime form of entertainment (Chalaby, 2012). As televisions spread rapidly and were soon present in most households, they brought entertainment inside the homes of the audience (Spigel, 1992). This can be considered as a threat to the cinema industry, which not only had to compete with a new means of viewing moving images/films but had to do so against an object present in the living room of nearly every audience member (Belson, 1958). However, television was not only a competitive force to cinema. Caldwell (2005) stated that despite what cinephiles and professionals of the cinema industry would like society to believe, TV often provides great (if not sometimes better) films and moviemakers. Sisto and Zanola (2007) pushed these findings further by pointing out that, in fact, cinema and television tend to be rather complementary in terms of entertainment rather than annihilating each other. They believe that even though cinema and television have to compete with each other for the audience's attention, both of them can survive and prosper in spite of the other. Indeed, the perpetual selling of movie rights to TV is a continuous source of income for the cinema industry (De Lille, 2019). Therefore, the invention of television may be considered as a technological disruption for the cinema industry as it heavily altered, somewhat endangered and pushed it to take some evolutionary measures discussed in the next section of this chapter, to provide the audience with a competitive service from the one they get with their television set in their homes.

Televisions are far from being the only disruptive innovation that endangered cinema. Another important detrimental event was enabled by the rise of the internet: film piracy. The concept of piracy may be defined as content from a producer being either reproduced or utilised without former permission from its owner (Domingo, 1997). Naturally for this to be relevant, said content must be copyrighted, that is legally bound to a producer who owns the majority of the rights on the media text, otherwise called intellectual properties of the

producer (Buskirk, 1992). Intellectual properties “take the form of so-called ‘intangibles’, such as ideas, inventions, signs, information, and expression” (Yar, 2005, p. 679). Therefore, film piracy includes, but is not limited to, sharing illegally obtained media text, using/reproducing an intellectual property without former approval of its owner or without crediting of the original media text, leaking media text before or shortly after its release date, and illegally downloading or streaming a media text (Remneland Wikhamm & Knights, 2016). While at first film piracy was principally achieved through the production and sale of illegal DVDs, with the rise of the internet and the spread of computers in the households, piracy moved to the cloud (Waterman, Ji, & Rochet, 2007). Byers et. al. (2003) show that the illegal access to movies online shortly after and sometimes even prior to their theatrical release has shown to be detrimental for the cinema industry. Remarkably, most leaks actually came from professionals of this industry (Byers et. al., 2003). This may come as a surprise considering the extent to which the film industry goes to in order to prohibit the illegal consumption of movies (McKenzie, 2016). Surely, the legal measures undertaken have lessened the amount of file-sharing behaviour in Sweden (Svensson & Larsson, 2012). Furthermore, research has discovered that there is a ‘film pirate as a criminal’ mindset fatigue in the UK, which if it is replaced by a ‘film-pirate as an antisocial miscreant’ mindset, persuade audiences of the added value of viewing a movie in the theatres and diminishes the downloading rate (Parkes, 2012). These findings are confirmed by Levin, Conway Datoon and Manolis (2007) who highlighted that downloading intent and attitude are highly linked to social norms, most specifically for occasional film pirates and when the risk is low. These conclusions are based upon the belief that film piracy has a financial impact on the film industry, a concept that many studies also disagree with (Bounie, Bourreau, & Waelbroeck, 2006). Danaher et. al. (2012) have proved that the longer the delay between the Hollywood release and the international release of a film is, the more piracy happens, leading to a lesser international box office revenue. Although the revenue gap might be a motivation behind the industry’s worldwide coordinated releases, it is not very significant (McKenzie & Walls, 2013). This is a finding that Zhang (2015) built upon arguing that illegal downloading is severe among a population that does not usually attend cinema theatres, hence the existence of illegal downloads does not, in fact, impact the box office revenues despite what the numerous lawsuits the cinema industry has launched suggest. Nonetheless, film piracy is still considered a threat to the film industry and many legal

solutions have been undertaken including protection technologies for movies and internet censorship (Janak, 2011).

As a result of these numerous regulations, a new technological disruption filled in the demand for watching movies at home easily, quickly and cheaply: Video-on-Demand platforms (Yoo & Poe, 2016). Video-On-Demand platforms, more commonly called VOD platforms, exist in two forms, the Subscription-Video-On-Demand (SVOD) platforms such as Netflix, Amazon Prime, and Disney+ that function based on a monthly subscription and the Transactional-Video-On-Demand (TVOD) platforms like Pathe Thuis, YouTube, and Apple Tv, using a pay per view technique. While SVOD is specifically popular for the legal home film distribution, both types of VOD platforms also represent a reason for concern for the cinema industry worldwide (Savage, 2014). As VOD platforms are an ethical legal way of consuming desired film content at home, they may be considered the source of the decline of the too restrictive TV entertainment (Twenge, Martin, & Spitzberg, 2019). Furthermore, the cinema industry has happily noted that VOD platforms render film piracy nearly obsolete due to quick – and legal – availability of movies (Welter, 2012). With VOD platforms, a movie can be watched instantly after being selected. This service does not come freely, as opposed to film piracy, however, it is fully legal and ethical, while also generating revenue for the cinema industry (Smith, Telang, & Zhang, 2019). Therefore, in recent years VOD has overcome both TV and film piracy to become the first source of home entertainment (Hilderbrand, 2010). In doing so, it also became the main competitor for the traditional cinema theatres (Behrends & Fischl, 2005). However, whether they endanger the cinema industry, or a part of that industry is a polemic discussion. Indeed, Henning-Thurau, et. al. (2007) believe that as VOD platforms allow for movies to be streamed for a price, they are, in fact, expanding the popularity of movies and therefore of cinema as a whole. Certainly, VOD platforms cater the cinema industry with a way to be closer to the audience and to provide them with a cheap means of consuming their product (Daidj & Vialle, 2007). Furthermore, arrangements between production studios and VOD platforms to distribute new movies is a strong way of maximizing the revenues over the traditional sequential release in theatres (Nam, Chang, & Park, 2015). Production studios have learned to be more careful when negotiating the terms of the copyrights' obtention by VOD portals (Re, 2015). However, Zhu (2001) believes that by shortening the value chain process within the cinema industry, VOD platforms may eventually lead to the destruction of this industry. This is an

opinion that Wayne (2018) shares, especially in light of the fact that many VOD platforms that initially started only as movie providers by allowing for the streaming of film produced by the industry's studios, are now becoming producers themselves. In this prospect, Netflix produces numerous 'originals' by using its inside information of consumers' data (Kannisto, 2019). This is the reason why VOD platforms are considered a disruptive innovation for the cinema industry. Not only have these portals forced the traditional theatres to alter their modus operandum in order to keep attracting the audience, which will be developed further in the next part of this chapter, but they are said to be endangering the cinema theatre industry by rendering it obsolete and replacing it with original content that is often highly criticised for its quality (Dreier, 2019). Therefore, the next section will mainly regard the way traditional theatrical distribution is challenged specifically by VOD portals that may be viewed as a new form of movie entertainment distribution/production medium.

2.1.2 Technological advancements

With the domestication and high popularity of television, followed by film piracy and finally with the modern VOD portals, the cinema industry has met challenges brought by many disruptive competitors over the years. As was highlighted earlier, many of these disruptive competitors were the result of technological advances such as the progress made in terms of recording cameras, the invention, domestication and popularity rise of computers and the internet. Some technological advancements in cinema happened due to the motivation of cinephiles to push the limits of their art, whilst other advancements of the field came out of necessity. For instance, Vitaly (2017) defends that the developments of technologies enabling talking movies, otherwise known as movie tapes capable of recording sound, is part of what made Cinema a true art. In a similar manner, colour was later added to enrich the artistic value of cinema and deepen the range of its possibilities (Pardo, 2013). However, as a result of new entrants such as TV, the cinema industry was forced to make cameras for moviemaking that were compatible with television sets (Vlahos et. al., 1973). This resulted in tv programmes buying some rights over movies, which then enabled further funding for producing new movies and made for an important part of the programming of tv channels (Behlil, 2010). Therefore, cinema and television are interdependent and at the same time not interchangeable.

On a distribution level, the cinema industry also had to innovate to remain competitive. This was achieved through the creation of big multiplexes, in which the audience could enjoy a movie but also consume and share some popcorn, various snacks and beverages with friends (Mazdon, 1999). Furthermore, in an effort to multiply revenues for the cinema industry and annihilate further the competition from television, VHS tapes, DVDs, and Blue Rays were created (McGowan, 2018). Indeed, once the audience members possessed a medium allowing them to watch moving images at home, letting them own and purchase movies long gone from the theatres appeared as a fruitful opportunity (Young, Gong, & van der Stede, 2010). This allowed further financing for the cinema industry that were reinvested in the making of new films and the improvement of the overall quality of movies (Young, Gong, & van der Stede, 2010). Naturally, a side effect of this lied in the fact that audience members held even more entertainment means in the comfort of their own home (McGowan, 2018). Furthermore, Nelson & Rutherford (2010) highlight that if a movie is released too quickly on DVD, it might lead to an important loss on the box office revenues. These elements are taken into account by the cinema industry to maximise its revenues when it comes to distributing movies around the world (Burgess & Evans, 2005).

As mentioned earlier, the theatre industry also had to compete later with the free movies issued from illegal downloads by investing in new technologies. This is why the popularisation and global spread of 3D technologies, including the screens, projectors, and glasses were operated (Elsaesser, 2013). The goal was to bring back to the theatres people who were interested in a new form of entertainment enhancing the movie watching experience (Ellis & Conaway, 2015).

With the more recent rise of VOD platforms, the cinema industry is facing its strongest competitor yet. Nonetheless, it may be argued that the movie theatre industry may, in fact, also benefit from all the new digital technologies. Yang, Anderson, and Gordon (2018) point to the growth of data on the audience, which can be used to the advantage of movie theatres with regards to their scheduling, may it be content-wise or timing-wise. Weinberg et. al. (2020) advise to enhance the audience's experience within theatres in order to keep attracting said audience. This is the reason why using technological improvements has led to new forms of cinema experience. For instance, by transforming the traditional screens into more curved and surrounding ones (screen X), or by altering the traditional seats into chairs moving along with the story (motion seats), theatres enable the viewer to be more

immersed in the movie and therefore provide them with a greater experience than the one they would receive from a VOD platform (Efrat et. al., 2016). Other examples are 4DX movies, in which the viewer gets a similar experience to 3D movies but with the addition of the motion seats, wind, and scent, as a make-belief of entering the story entirely.

In the quest to stay competitive, improving the content of movies is also essential. In this respect, more and more movies are based on successful books (Liu & Yao, 2019). This presents the advantage of attracting to the movie the fanbase of the book in addition to the regular movie visitors, but it is also a higher risk as the fanbase may be ruthless in its reviews of the film (Haase, 2015). Another interesting finding with regards to the improvement of the content quality of movies lies in the fact that investors are more likely to finance movies with a potential for sequels in the belief of a higher return on the investment (Gong, van der Stede, & young, 2011). This technique has shown to be efficient even if sequels tend to do less good than their parent movie (Dhar, Sun, & Weinberg, 2012). Overall, it may be argued that investors are increasingly seeking a good and popular story for their next movie.

2.2 The transforming production culture

Before attempting to answer the research question we need a clear understanding of what is meant by film production culture and how it may affect the success of movies. The concept of production culture itself is seldom mentioned and always defined differently. Only four notable studies have been identified treating of this concept, namely Caldwell (2008)'s, Mayer, Banks, and Caldwell (2009)'s, Lobato (2009)'s and Szczepanik and Vonderau (2013)'s. The following study heavily relies on their initial analysis of production culture. Caldwell (2008) one of the precursors of this field regards production culture in terms of the people that are responsible for the making of movies. He believes that not only big personas such as producers, directors or stars have a strong impact on the production of a movie but also smaller-scale employees such as photographers, writers, and make-up artists. Szczepanik and Vonderau (2013) agree with this analysis and go further by stating that each individual involved in the making of a movie brings their own culture and influence on the movie. This is something important to consider in light of the fact that cinema is both a creative art and a form of business (Caldwell, 2008). As increasingly diverse groups of people are making movies, the topics targeted are also evolving and more and more social

issues appear on screen (Mayer, Banks, & Caldwell, 2009). In other words, culture is essential in the making of a movie (Szczepanik & Vonderau, 2013). This shows to be an advantage however when looking for financing (Lobato, 2009). Financing is an essential step to make movies as they are expensive and more often than not a gamble on the question of their rentability. Lobato (2009) found that as governments try to promote culture in their country, they are often more likely to help financing a movie targeting a cultural issue. However, financing may also be found elsewhere and notably on the revenues obtained from previous lucrative movies, hence a successful distribution and marketing play an important role in production culture (Caldwell, 2008). This is why the distribution sector has had to move beyond the simple domestic theatrical release in order for productions to become more international (Lobato, 2009). The internationalisation of the production culture is achieved by the means of exportation of movies both in terms of distribution but also on a production level (Mayer, Banks, & Caldwell, 2009). Indeed, in recent years, production has been shifting away from studios and has been occurring more and more in a real-life context on domestic and international levels (Mayer, Banks, & Caldwell, 2009). This internationalisation of the production culture has to be done with respect to international social differences (Lobato, 2009). However, they offer a great opportunity of learning from other countries' own production culture, which can be inspiring (Szczepanik & Vonderau, 2013). Finally, it is important to note that governments play a role in production culture as politics influence how and why things are made the way they are (Szczepanik & Vonderau, 2013).

After carefully reading, reviewing and combining from these four ground-breaking texts on production culture, an original framework was created. To understand production culture, it needs to be analysed and conceptualised in terms of the five dimensions that constitute its framework namely: (1) financing/state aid, (2) regulations/government policies, (3) cinema landscape, (4) production and distribution landscape, and (5) history and culture of films. These five dimensions are explained and defined below.

2.2.1 Financing/State aid

The first dimension when thinking about film production culture concerns the financing of films. As funding is unavoidable in order to make a movie, it is important to consider where the money comes from and what the conditions for receiving a fund are. Movies are

always expensive to produce and rarely cost less than a few million dollars with records going up to 378.5 million dollars (Evans, 2019; Honthamer, 2010). This is the reason why there are many ways of financing a movie such as official funding companies and associations (Olchawska, 2017). These funds often have the sole purpose of enabling the creation of movies, which they view as an investment, hence they are interested in funding movies with big box-office potential such as the ones produced in Bollywood (Pillania, 2008). For instance, one might be able to apply for a grant depending on the type of movie (feature film grants, short film grants, documentaries grants, etc), the geographical region the movie is dealing with (grants for Asia, grants for African filmmakers, etc), or the particularity of the film marker (grants for women, grants for upcoming filmmakers, etc) among many others (Newman-Baudais, 2011). Naturally, funding seldom comes without conditions. Generally, funds require a financial participation taken from the revenues of the movie supported (Brennan, & Tamarowski, 2000). However, sometimes investors may request certain changes regarding the script, casting, shooting locations, or any other aspect of the movie (Joshi, & Hanssens, 2009). In other words, the original project of a movie is always different from the end product, which may come as a challenge for artists who see their artistic vision forcibly altered.

Another popular funding source for a film is governments or state aid (Coles, 2010; Murschetz, Teichmann, & Karmasin, 2018). Governments along with crowdfunding, private investors and funding associations represent the main solution for producing a movie (Desai, Loeb, & Veblen, 2002; Derin, 2010). These parties are interested in investing in movies for various purposes, namely economic productivity as well as celebrating culture and educating the country's population (Government of The Netherlands, 2018). These government/state funds often come with limitations even stricter than the ones asked by funding companies and associations such as the obligation to use domestic labour for the making of the movie, and/or even to convey certain values dear to the state portrayed in the movie (Coles, 2010).

Certainly, all these regulations accompanying financing may raise the question of the end quality of a movie. Garcia-del-Barrio and Zarco (2017), have shown that the content of a movie undoubtedly affects its box-office revenue and overall success. However, they conclude their study by highlighting the need for further research into the question of whether a higher budget make for a better-quality movie with higher revenues. Based on

Ravid (1999)'s findings, it is safe to assume that investments related to big budgets are often, although not systematically, a sign of higher revenues on the box office. This is due to the fact that a high budget allows for big actors, high quality special effects, and famous music to be employed in the making of the movie, ensuring a theoretical higher quality and rendering it more popular (Ibnal Asad, Ahmed, & Rahman, 2012).

Focusing on which institutions participate to the financing of movies in The Netherlands and what their return policies are, is of interest to understand production culture in The Netherlands and how it might impact the Dutch population. This is in agreement with the analysis of Lobato (2009) stipulating that financing/state aid are an essential dimension of production culture that must be studied.

2.2.2 Regulations/Government policies

It is important to note that regardless of whether a government does or does not fund a project, it still has an impact through official regulations and policies (Szczepanik & Vonderau, 2013). This is supported by Hift (1994), who points out that governments cannot be ignored in their influence on production culture. Indeed, governments have historically used movies in order to achieve their own means. In that respect, one might think back to Nazi Germany and the multiple propaganda movies that were created during the Nazi regime to convey the Nazi ideology through to the population (Hoberman, 2019). For instance, the documentary *Triumph of the Will* by Leni Riefenstahl is still, to this day, considered as one of the most influential documentaries of all times for the role it played in spreading the Nazi ideology and make it appeal first to the German Nation and later to other invaded European populations as well (Kelman, 2003). This illustrates that a government might influence either the topic of the movie or the values presented to a society (Hift, 1994).

Furthermore, despite using films as a tool to achieve their own means, governments also have a way of impacting movies through censorship or simply regulations. Censorship is common throughout the history of film (Martinez, 1998). Censorship, or the action of excluding parts or the entirety of a text from being distributed is based on criteria such as the depiction of sexual, violent, and/or psychologically challenging content as well as the presence of values, and/or ideologies different from the ones of the country the movie is trying to be distributed in (Skinner, 1955). An example of this may be the censorship of the

movie *Titanic* in Afghanistan during the Taliban regime (Baily, 2004). Indeed, while the Taliban regime forbade the movie's official distribution in the country for religious reasons, the movie was illegally distributed and became the biggest hit in the country's history, with merchandise, haircuts, and events organised around *Titanic* (Baily, 2004). This example shows the power of movies on a population that sometimes even surpasses a government ban. To this day, censorship and government control are still being used everywhere in the world. The most common example of this is the rating system that is unique and in accordance with each country's own values and culture (Thrasher et. al., 2014). This explains why the United States, which is a country with important religious values, has strict age regulations based on violent, offensive and sexual content displayed in films, while the same criteria give way to less strict regulations in Scandinavian countries (Sundholm, 2012).

Naturally, The Netherlands also presents a form of government influence impacting the film production culture through its key role in Kijkwijzer, the Dutch regulation system for audio-visual content as well as various investments, which one might want to investigate in order to obtain a better understanding of how the Dutch government attempts to manage, educate, bring together and/or cultivate the country's population. Therefore, the importance of government regulations/policies for the making of a movie cannot be denied and should henceforth be added to the list of criteria giving meaning to the film production culture concept.

2.2.3 Cinema landscape

Another important aspect of production culture within a country is the cinema landscape with the market characteristics of the consumption of film. In this regard, the European Audiovisual Observatory collects data on film attendance in all European countries as well as the reception of European movies abroad annually, which shows current trends as well as clear differences between countries (<https://www.obs.coe.int/en/web/observatoire/>). Thanks to these results, the European cinema industry is able to adjust its products and become more and more successful. As much as cinephiles might like to pretend that cinema is only an art, it also is a form of business that must remain prosperous to not become obsolete. Hence there is a need for a proper analysis of both the local market as well as the international one. For instance, the study of genre preference in the UK enables Redfern (2012) to identify the type of movies

that is most likely to appeal to any target group within the audience. This information may be very handy when it is time to advertise a movie to the right target group in order to ensure the highest success at the box office.

The box office may also be influenced by other elements such as big names attached to the making of a movie (Elberse, 2007). This is the reason why certain actors and actresses may be considered as stars due their popularity among the audience members (Elberse, 2007). Naturally this is also true of some directors although to a lesser extent (De Vany, & Walls, 1999). Naremore (1999) points out that authorship is also an essential aspect of the cinema landscape as it both defines and influences movies. Similarly, it was found that not only do stars influence a movie perceived quality, but they also influence the audience's attendance (Elberse, 2007). However, academics and experts of the field have long argued over this strength of the influence of stars over the box office (Basuroy, Chatterjee, & Ravid, 2003). Indeed, Basuroy, Chatterjee, and Ravid (2003) argue that critics have a far more important role on the box office revenue than do stars. De Vani and Walls (1999) tend to agree that no amount of star power may save a bad movie. Overall, Desai and Basuroy (2005) indicate that while star power may sometimes show to have a positive influence on the box office, they may also lead to harsher critics. In other words, using stars in a movie is a gamble that the cinema industry often takes all around the world (Elberse, 2013).

Another aspect of interest in this dimension lies in the ownership of cinema and the diversity of providers. For instance, one might notice that in Japan nearly all movies are provided by Cineplex, Toho, Aeon, and Movix. This relatively wide concentration of providers enables a broader diversity of the content available to the audience, as each theatre focuses on its own particular genre specialty (Coates, 2018). This enables to reach a very broad range of consumers within the country, making Japan a big consumer of movies in theatres (statista, 2019). This market structure context is a form of monopolistic competition, that is a context in which there are numerous firms providing a similar product, in this case, theatres providing films, yet each show for an original different text as each cinema brand focuses on its own genre (Küng, 2017). However, Japan is an outstanding case. Often, the rivalry that comes from the multiplicity of theatres put a halt to the diversity of the content shown in a country to instead display the same movies in all cinema theatre chains (Küng, 2017). An example of such context may be found in Belgium where Kinepolis, UGC, Imagix, Pathé, and Quai 10, share the majority of the screen display across

both the Walloon and the Flemish regions. As Paris (2015) points out, these five theatre providers are indeed in a perfect competition market structure context, because all of them show more or less the same selection of movies and provide similar services from one another. Certainly, people have their favourite cinema with memberships and habits they favour, hence the need to have a good understanding of a country's movie providers to negotiate the right contracts (Ebbers, & Wijnberg, 2009).

In light of these results, it is important to understand how The Netherlands, a far smaller country, handles its own cinema landscape. This cinema landscape, that is genre preferences, attendance statistics, ownership and main key figures of its industry, must be studied in terms of both local and international target market as well as the market structure that the country has opted for.

2.2.4 Production and distribution landscape

Once an overall understanding of a country's demands, preferences and overall cinema landscape is established, one might be interested in the production and distribution system of a country. Certainly, in order for a movie to exist and be seen, it must first be produced and then distributed. Often, these two processes are separated, hence why there are distribution companies and production studios. However, there is not one single model to create a movie. For instance, the United States is known for having nearly all of its production and distribution landscape located at the same place: Hollywood (Schatz, 2004). There, one can find the world's biggest cinema studios as well as many in-residence famous actors. This presents the advantage of gathering in the same place all forms of talents, creativity, and innovative geniuses that the cinema industry requires to prosper (Lampel, 2011). The success of Hollywood movies relies on its studio system, which gathers both money, innovations, and expertise in order to create the most influential and profitable branch of cinema in the world (Regev, 2016).

However, over the past few years, it can be noticed that Hollywood has met a strong opponent in the form of Netflix, a new entrant in the film production and distribution industry (Murphy, 2019). While previously Netflix was a streaming platform on which movies were re-distributed, it has, for a few years, started investing in production too, which are highly recognised and rewarded. For instance, one might think about the few theatrical releases that Netflix has launched, notably with the movie *The King*, to be eligible

for big awards recognitions such as the Oscars (Rubin, 2019). Furthermore, Netflix applies a policy of localisation (Dias & Navarro, 2018), which has the effect that movies and tv shows are being produced domestically for a domestic public, resulting in a higher probability of success of the media text (Schäler, 2003). Indeed, the location a movie takes place in was found to have an important impact on the consumer reception of the film and their motivation for seeing it (Goldsmith, & O'Regan, 2005). A location has the potential to bring in a lot of money from domestic audiences as well as render a movie cult for the landscape it was turned in, as it did for the *Lord of the Rings* trilogy, for instance (Jewell, & McKinnon, 2010). Certainly, domestic products, by their usage of the country's language, landscape and culture present the advantage of bringing reality and the possibility for the audience to truly identify with the media text, resulting in more appreciation from the public (Akinola, 2019). For instance, Akinola (2019) discovered that the film industry in Nigeria gained popularity and validity within its country due to the deeply national context being portrayed in domestic movies. This type of findings suggests that the new localisation politics of Netflix may be very successful and prosperous both for the company and for the countries' creative industries that are targeted by this business strategy, to the detriments of the traditional big institution such as Hollywood. In other words, this suggests that movies are increasingly being watched at home by consumers rather than in cinema theatres, which leads to lesser box office revenues (Behrends & Fischl, 2005). Unfortunately for the traditional film industry, this important loss of revenues is not recovered from distributing movies to external VOD platforms due to a very small negotiation margin, as VOD platforms are now capable of creating their own popular content (De Lille, 2019).

Therefore, if an institution as important as Hollywood is endangered by the rise of the Netflix productions and VOD platforms as a whole, one may only wonder what it is like for a smaller film production industry such as the one of The Netherlands. It is interesting to look at what measures are undertaken to remain competitive. These types of information are not only important for moviemakers to gather but also for the theatre and film distribution industries that need to adequately programme and market a movie (De Lille, 2019).

2.2.5 History and culture of films

Finally, it has often been defended that the history of a country and therefore its culture has a strong influence on said country's cinema (Diawara, 1992). Therefore, the last

dimension of film production culture should not be overlooked, even if it is the hardest one to measure. Indeed, as one's identity is strongly built on one's culture and history (Edensor, 2002), it is important to know what that culture is and how it has evolved. Stets and Burke (2000) state that people understand society based on elements that they identify and attempt to belong to in an effort to build their social self. Certainly, understanding how people categorise in society, what motivates them in this categorisation process, to discover how the self is built, in other words how the social identity is built, may allow for a broader understanding of society as a whole (Stets & Burke, 2000). It is believed that one thing that ties a society together is its culture, which is based on a shared history and values of the group (Castoriadis, 1997). Therefore, in order to understand one's identity and overall a country's culture, one must look at their history. In this prospect, looking at the history of and through movies in the given country might help. Indeed, movies are both a reflection of the time it was made in and a reflection of the society that made them (Hughes-Warrington, 2006). In other words, to shed some light on a country's identity, one may look at the culture that transpires through its films. For instance, Mazdon's (2007) study demonstrates that the Cannes Festival has, through the years, enabled the construction of the French nation through its universalist cinema, which vouches for the initial success of the festival and domestic cinema in France. In other words, the nation above all culture portrayed in French movies has made the success of domestic cinema in the country, which is reflected in the fame of the Cannes Festival (Mazdon, 2007). Looking back on the universalist culture of France, one must consider the Colonial time and how cinema was used as a means of education for the autochthone populations to be taught about the 'dominant culture' and what they had to abide by (Salhi, 2008). The culture of the Nation before religious, ethnic or even racial identities displayed then, both in cinema and among the colons, can still be found in modern-day France and its cinema (Brozgal, 2019). Indeed, while casting has become more diverse, questions of ethnicities and races are still not touched upon in cinema in an effort to accompany the government's political correctness or political silence on such matters (Brozgal, 2019).

Another example of the building of an identity through movies lies in how Hollywood spent years portraying cowboys in Westerns as heroes and founders of the nation, while the Native-Americans were considered as savages who should be eliminated (Philip, 2001). This depiction illustrated the past values of the first American colons but also enabled to spread

the hero identity among American consumers (Philip, 2001). To this day, this societal conflict opposing the Native Americans to the rest of the population is still alight in the United States, partly due to the popularity of Westerns (Leuthold, 1995). Another important impact that this hero identity and the superiority culture has had in the United States and its cinema is what Fasta and Arsi (2015) note as a tendency to present the United States as king of the world and the Americans as gods. It is undeniable that most movies depicting an alien specie's arrival on earth, a virus with only a few survivors, or any form of catastrophe or event that might have a worldwide impact always takes place in the United States and results in the 'Americans' saving the day and the rest of Humanity (Murray, 1970). This contributes to the popularity of these movies in the United States. Indeed, when producing domestic movies aimed at a domestic audience, the resonance of the cultural and historical contexts makes for a more attractive movie due to the nationalistic feelings awakened consciously or unconsciously by the visuals and storyline (Rajadhyaksha, 2003).

This leads to a further discussion regarding the impact of culture and history on genre preference in a country. Certainly, while the content of a movie may influence an audience, it may also indicate the preferences of said audience. Furthermore, Redfern (2012) identified that the genre of a movie may also strongly indicate what portion of a country's audience might be interested in watching a given movie. Indeed, Fu (2012) has shown that there are clear preferences for movie genre in various countries, which are related to their cultural identity and history. An example of this lies in the love of the anime genre in Japan (Thomas, 2012). Indeed, Thomas (2012) has shown that a great part of the original success of both the anime and manga genres in Japan lies upon the fact that the stories and designs are highly based upon the Japanese culture, ethnography, history and religion. Miyao (2002) goes further in his analysis by demonstrating that animation always occupied an important place in the Japanese cinema history, but that the second World War and the atomic disaster ensued by the bombs in 1945 was a turning point that brought the Japanese culture both fear of and optimism for technology. In other words, anime may be view as a form of illustration of the Japanese history and the country's relationship with technology, as well as a means of escaping it (Schroy, et. al., 2016).

Therefore, it appears that the production culture of a country can hardly be fully understood without considering the impact of the cultural history of said country on the making and reception of movies in accordance with the findings of Mayer, Banks, and

Caldwell (2009). The few examples reported in this section illustrate the role that domestic cinema plays in the overall culture of a country due to the national identity displayed in its movies. It might bring one to wonder what values, identities, and overall culture are being transferred to the Dutch public through Dutch movies.

2.3 Audience's motivations

Before diving deeper into this study and researching how the Dutch film production culture is reflected in the motivations of the audience members for going to the movies, one must look closer at previous research. The drive pushing people to go to the theatres is a subject that has long been studied by academics and experts of the industry alike as understanding this phenomenon allows for a better exploitation of it and eventually higher box office revenues. Firstly, one may wonder what motivates people to consume movies regardless of the platform, place or condition. Traditionally, it was assumed that people purely consume movies for hedonic reasons, that is, for enjoyment and pleasure. However, Oliver and Raney (2011) highlight that a strong eudemonic motive also exists. In other words, people research meaningfulness when they watch movies, reasons why a genre such as drama is among the most popular ones (Oliver and Raney, 2011). This is a finding that supports Austin (1985)'s original quantitative analysis of the motivations for attending movies. He identified a total of twelve motivations, namely cinema is an enjoyable/pleasant activity, a pass time, a social activity, an escape/get away/forget, a source of arousal/excitement, a source for learning and information, a mean for positive mood enhancement, a communication resources, a way to learn about one's self, a manner of relieving loneliness, a source of relaxation, and finally a mean of obtaining behavioural resources.

Naturally, as previously expressed, the cinema industry has changed over the years and the means of distributing movies have multiplied. Along with this multiplication of platforms came additional motivations related to each platform. For instance, Henkel, James, and Croce (2015) identified that the desire to watch movies over and over as well as a lack of guilt and a notion of impatience are often the motive for people to consume movies illegally by either downloading or streaming illegally. This seems to only highlight further the social aspect of consuming movies legally (Henkel, James, and Croce, 2015). Furthermore, in an era when movies are available at home for an affordable price or even

for free, going to the cinema has become an activity often motivated by a notion of fandom due to the more immersive and rewarding experience that this medium allows for (Henkel, James, and Croce, 2015). Indeed, the audience members feel more strongly about movies viewed in the theatres due to the emotional aesthetics (Fröber & Thomaschke, 2019). This is especially true when compared to the experience of watching a movie on VOD platforms (Mikos, 2016). These new entrants provide the audience members with a freedom of scheduling and of movement as well as equipment that are strong incentives for consumption (Mikos, 2016).

All research established on motivations for consuming movies regardless of the medium used agree on the fact that different groups tend to have different motivations from one another. For instance, frequent viewers may feel more strongly that going to the movie is an enjoyable activity than less frequent viewers (Austin, 1985). This variance in motivations may be applicable to all types of groups such as age, gender, nationalities, social class, etc.

3. Methods

The following chapter of this master thesis sets and establishes a method to answer the research question at hand: *'How is the transforming film production culture in The Netherlands reflected in consumers' motivations for going to the movies?'*. It will first discuss the benefits of a qualitative method for this research (3.1), followed by the specifics of the first chosen technique, namely the document analysis (3.2). It will then move on to defending the choice of conducting interviews (3.3), which will be achieved by first considering the consumer interviews (3.3.1), and then the forced alteration to the original plan of conducting expert interviews due to the COVID-19 crisis (3.3.2). Finally, the last part of this chapter will focus on the method used to analyse the data once it is obtained (3.4).

3.1 Qualitative Methods

The research topic of this study is a long-time interest of the researcher who is a passionate fan of cinema. This specific topic was selected to acquire knowledge on an industry that she would like to work into after her studies. Once the subject was chosen, came the question of how to research it. Previous research, both academic and non-academic were initially considered to gather an understanding of not only the topic but also of where limitations lay in the already existing frameworks (Gravetter & Forzano, 2017). The establishment of a theoretical framework enabled to both complete and create an original framework to base the research on (Gravetter & Forzano, 2017).

The study targets a subject seldomly covered in academia. However, when it is, qualitative methods were usually used as a research technique (Caldwell, 2008; Mayer, Banks, & Caldwell, 2009; Szczepanik, & Vonderau, 2013; Loboto, 2009). Namely, interviews, document analysis, and focus groups among the most noteworthy methods were primarily used (Caldwell, 2008; Mayer, Banks, & Caldwell, 2009).

In line with these findings, it was decided to also opt for a qualitative research method in this study. In addition to adding to previously established findings, a qualitative method presented various opportunities for this research. Qualitative research is the optimal method to highlight and draw meaningful relationships in the data (Kvale, 1996). Brennen (2017) goes further by stating that as opposed to quantitative research method,

qualitative approaches may be defined as the actions of “using language to understand concepts based on people’s experiences, it attempts to create a sense of large realm of human relationships” (Brennen, 2017, p. 4). In other words, the qualitative research method is based on the concept that reality is a social construct, which ties must be studied and analysed in order to make sense of the world. This method enables to report the subjects’ experiences with, and understandings of the situation studied, provide explanations on the phenomenon of interest, and draw a comprehension of the processes and structure–agency interplay (Brown, 2010). Furthermore, this research method allows for flexibility and potential evolution in the research process and may diminish the power distance between the researcher and the participants, which leads to more valuable and richer data collection that might give way to surprising results (Brown, 2010). Overall, results obtained through qualitative methods of analysis are reliable and reflexive despite the usually smaller size of the samples considered (Brown, 2010).

Therefore, it can be argued that the essence of the research question of this study itself called for a qualitative approach. Indeed, a major part of answering this question relied on identifying what the Dutch cinema production culture is like and how it is currently transforming (Boeijs, 2010). Based on the careful reading of pioneers’ work on production culture, five dimensions were deductively identified as composing this concept. Elements of each of these five dimensions of production culture had to be identified for the case study of The Netherlands for the purpose of this research. Namely, (1) financing/state aid; (2) regulations/government policies; (3) cinema landscape, which included genre, attendance, provider, ownership, directors, actors, writers, main key ppl/figures, etc.; (4) production and distribution landscape, a category composed of companies in charge of the moviemaking process, numbers of film produced, technological disruptions, VOD disruptions through new entrants on the film market; and (5) history and culture of films, which focused on what makes a movie essentially Dutch and the role that this plays in attendance or more simply put why audience go to the movies. Once these elements were identified they had to be given meaning by identifying the values they held. Recurrent themes appeared, enabling the understanding of the cinema production culture in The Netherlands. Finally, in order to cover the last part of the research question, one had to look closer to the consumers of movies in The Netherlands. Therefore, a qualitative approach was undeniably the ideal method to go in-depth in the understanding of the perception of the transforming Dutch

film industry by its consumers. Qualitative approaches enabled one to draw meaning from people's relationships (Kvale, 1996), therefore, this research method allowed one to reveal what meaning consumers give to certain values, types, and elements of a movie. By identifying recurrent themes among the data and the Dutch people, a better understanding of the developing Dutch cinema production culture and the motivations of consumers' cinema attendance was obtained.

The qualitative research occurred in two sequences. First, a document analysis focused on the first part of the research question while the second part was covered by a set of interviews. These two sequences were then also put in perspective with data from older research. Each of these techniques from this triangulation method, that is, multiple methods used to study the same phenomenon (Bowen, 2009), is explained and defended in the following sections.

3.2 Document analysis

The first part of this study is a document analysis shedding light on the production culture in The Netherlands and the transformations it is going through. For this, each of the five dimensions of production culture was considered for the case of The Netherlands. A thematic analysis (which will be explained further in the fourth section of this chapter) was conducted on various documents on the Dutch film industry so as to understand the technological transformations, the relationship to the Dutch government, and the trends and specificities of the Dutch cinema industry. Various types of official documents such as conference reports, press releases, policy documents from industry sources such as FilmFund, government reports, and other various public records were considered. A document analysis was optimal to set the premise of this study as it enables the researcher to "elicit meaning, gain understanding, and develop empirical knowledge" (Bowen, 2009, p. 27). It was, furthermore, an interesting research technique when conducting deductive research, such as this one set in the theory of the five dimensions of production culture (Braun & Clarke, 2006).

With regard to the sampling technique, a theory-based sample was used, meaning that the sample of documents selected was set in the theory of the five dimensions of production culture (Flick, 2011). Only documents related to the five dimensions were considered in order to define, understand, and establish the concept of film production

culture in The Netherlands. Naturally, this also ensured that the sample was representative as each dimension was solely focused on in the document analysis (Flick, 2011). The document analysis was enabled by the research of media text online with the use of keywords such as 'Dutch film production industry', 'Funding a film in The Netherlands' and 'Dutch cinema', as well as numerous variants of these key phrases in the Dutch language. Criteria of selection for a text were their date (as the research dealt with the recent transformation of film production culture, only recent texts were of interest for this study), their theme (only texts mentioning the film production culture and its transformation in The Netherlands were considered – texts mentioning Europe as a whole were discarded as Europe is composed of many nations each with their own culture and own cinema, making a generalisation of European cinema if not impossible was in any case not accurate to this study (Bergfelder, 2005)-), and their author (mostly official and recognised sources were being used in this document analysis, however a small part of popular culture were also be taken into consideration by looking at important blogs and papers). The complete list of the selected sources may be found below (see table 3.1).

Document	Title	Organisation	Date	Pages	Why this selection?
1	Film facts & figures of The Netherlands	NL Film Fonds	May 2019	31	This source shows to be essential to gather a complete understanding of the modern trends and numbers within the Dutch cinema industry. It provided information on every one of the five dimensions.
2	New Cinema Conference on the future of cinema report	Film Research Netherlands	October 2019	32	This source allowed the researcher to understand how professionals of the industry perceive the current situation and how they visualise the future of cinema. It provided information on every one of the five dimensions except the second one government regulations / state aid.
3	Cinema what's new?	PWC	2018	Web page, 896 words	This source revealed numbers and trends from the Dutch cinema industry for the year 2018 as well as predictions for the up-coming years. It shed light on the first, the third, and the fourth dimensions of this research.
4	Film Incentive	NL Film Fonds	2020	Web page, 768 words	This source enabled to gather a good understanding of the criteria of selection for financing a movie in one of the most popular funds of The Netherlands. It provided information on the first dimension.

5	Film in de Uitgangspunten Cultuurbeleid 2021-2024	NL Film Fonds	June 11, 2019	Web page, 669 words	This source enabled to understand the role the government plays in the cinema industry in The Netherlands from a source directly related to this institution. It shed light on the first, the second and the fourth dimensions.
6	Minister komt tegemoet aan wensen filmmakers	De Film Krant	June 19, 2019	Web page, 467 words	This source enabled to gather information about the government's involvement within the Dutch cinema industry from a source that would be unbiased because not related to this institution. It shed light on the first, the second, the fourth and the fifth dimensions.

Table 3.1. List of selected documents for the document analysis

3.3 Interviews

To complete the findings from the document analysis and measure the second part of the research question of this study regarding the motivation of consumers for going to the movies, one needed to get close to the consumers themselves. This is the reason why interviews were an optimal research technique to establish a conversation with consumers on the topic of cinema and the consumption habits.

Indeed, interviews have shown to be a good means for getting close to the population one attempts to study as they provide in-depth and detailed perspectives of the interviewee on the phenomenon under study (Brounéus, 2011). This is especially the case when the interviews take place in the format of a guided conversation as opposed to a structured interview (Brennen, 2017). Henceforth, semi-structured interviews have been conducted for this research. This method was used over unstructured interviews to ensure that the results obtained were reproduceable, reliable and somewhat generalisable (Gerace

& Smith, 1985). Indeed, while the in-depth information obtained from an interviewee are valuable insights, they might not be representative of the overall population. Therefore, multiplying the results and interviewing various people in similar manners, with an identical set of general questions while letting some free space for a natural and free conversation with adapted to the situation follow-up question, was essential for the results of this study (Gerace & Smith, 1985).

Certain elements have to be taken into account to ensure that the interviewing process was done efficiently, ethically, and accurately. Roulston, de Marrais, and Lewis (2003) insist on the importance of the right and proper phrasing of interview questions to avoid influencing, confusing, and/or annoying the interviewee. The formulation of the question list was essential even when aiming for a conversation with the interviewee more than for an interrogation. Therefore, probes were used for the interviewer to not put herself in a difficult situation that might jeopardise the whole interview (Roulston, de Marrais, and Lewis, 2003). On an ethical level, all interviews were agreed upon between the two parties and interviewees were guaranteed of their anonymity in the final project, they could refuse to answer questions, stop the interview at any point, and ask for any clarification they might have needed (Brennen, 2017). Furthermore, interviewees were aware of and agreed to being recorded during the conversation. This was done in order to both to put the interviewees at ease with the researcher but also to ensure that no harm would be done to neither the interviewees as people nor to the research itself by jeopardising it with unethical matters. In chronological order, the document analysis was first conducted so as to set the right basis for the research by drawing a deep understanding of the five dimensions of the film production culture in The Netherlands and its contemporary transformation. Based on these findings two interview templates were created: one aimed at experts of the film industry and one for the avid consumers of movies in The Netherlands. However, due to the COVID-19 crisis this research method had to be altered significantly as will be expressed in the later sub-section of this segment.

On a format matter, it is important to highlight how the COVID-19 virus has affected this research. Indeed, all the interviews were originally supposed to be done face-to-face to facilitate the observation of both the interviewees' verbal and non-verbal cues during the conversation (Brennen, 2017). It was also expected that physical proximity might facilitate the start of the conversation and bring about a more comfortable and confident

atmosphere (Rowley, 2012). However, due to the virus, the Dutch government issued a social distancing policy, and many people, alike the researcher, decided to somewhat self-isolate themselves. Naturally, this situation made the meeting face-to-face for the interviews an impossible happening. Henceforth, the interviews had to be conducted instead online, through video conferences via Zoom. While this technique did save some commuting time for both parties and enabled a swift fit to the interviewees' schedules, and despite the video conference enabling the observation of non-verbal cues, interviewing through Zoom limited the amount of small talk topics shared with the interviewee before 'getting to work' (Rowley, 2012). The best was made of the situation and all interviews were conducted smoothly. Each interview lasted on average 52 minutes and was conducted, in English, in a quiet setting. Once conducted, the interviews were transcribed in a verbatim manner to facilitate their analysis.

3.3.1 Consumer interviews

The set of consumers interviews took place once a full understanding of the themes composing the five dimensions of the Dutch cinema production culture were established through the document analysis and the reviews of past academic research. This finalised the chronologically followed triangulation method (Bowen, 2009). Indeed, the consumer interviews enabled to shed light on the way the Dutch audience perceives Dutch movies, cinema in general, and the transformation the country's film industry is going through. Therefore, themes such as past cinema experience as opposed to the one they currently have, motivations for going to the cinema theatres instead of staying at home to enjoy some VOD experience, the frequency of their usage of modern cinema technology (such as Imax, 3D, 4D, screen X, etc), and what does going to the cinema represents to them were touched upon in these consumer interviews (see appendix A).

Regarding the sampling method, the COVID-19 crisis altered the original sampling plan. Indeed, at first participants were supposed to be found by going to various cinema theatres and asking clients if they would have been willing to participate in the study, therefore using a random sampling technique (Flick, 2011). However, with the closure of all public buildings including cinema theatres, this original plan was not achievable. Therefore, an alternative sampling method had to be used. Considering that the consumer interviews are set in the theory of the five dimensions of film production culture, a purposeful

sampling method was applied (Flick, 2011). Sampling criteria were set to ensure that each participant would have an adequate amount of knowledge on the topic at hand and would belong to the portion of the population targeted by this study. Namely participants were gathered among the part of the population that still attends cinema theatres on a monthly basis at least, that is knowledgeable on Dutch film productions and Dutch cinema, and that is able to reflect on the contemporary transformation and changes that have occurred/are occurring in this industry. No further demographic criteria were set with regards to age, nationality or gender to be as inclusive and representative as possible. An announcement was posted on social media platforms such as Facebook, WhatsApp, and Reddit to gather such participants. A snowball sampling technique was then also used as participants were asked about their own network that might be willing to participate in the study.

In total nine interviews were conducted with Dutch consumers, as this sample of nationality was the only one who could be found to meet all the previously expressed criteria (see table 3.2. for more details on the participants sample). Finally, on a contextual note, all the interviews took only into account the experience and the relationship with cinema that consumers held before the self-isolation times. Indeed, all participants indicated a significantly higher watching ratio of VOD platform since the start of the confinement. These results although interesting on their own were discarded for the purpose of this study as they were not reflective of a ‘normal life’ setting or context, which was targeted in this study.

Name (invented for anonymity purposes)	Length of the interview	Age	Number of visits to the cinema per month on average
Mark	1h. 13 mins.	25	3 times a month
Paul	47 mins.	21	Twice a month
Beth	45 mins.	28	Twice a month
Helena	48 mins.	22	On a weekly basis
Felix	45 mins.	20	3 times a month
Donnie	51 mins	22	On a weekly basis
Sarah	49 mins	19	On a weekly basis

Cosima	57 mins	24	On a weekly basis
Allison	56 mins.	23	3 times a month

Table 3.2. List of the selected consumer sample

3.3.2 Expert interviews and the COVID-19 crisis

Before the COVID-19 crisis hit The Netherlands, a plan had been made to conduct a second set of interviews among experts of the Dutch cinema industry. The reasoning behind this was that the expert interviews would likely bring about further in-depth information about the field studied completing the understanding for the Dutch cinema production culture (see Appendix B). Unfortunately, due to the COVID-19 crisis, this initial plan was rendered impossible. Indeed, with the closing of cinema theatres, the hold on the production of new movies, and the cancellation of all film festivals for the foreseeable future, the cinema industry suffered significant losses from the virus-led situation. Therefore, professionals of the industry were highly focused on surviving economically, finding alternative solutions, and overcoming these difficulties. Consequently, no expert with time to spare to take part in a master research could be found. Eventually, it was decided, with the supervisor's approval to abandon the project of adding expert interviews to complete and correlate the document analysis focusing solely instead on consumer interviews.

3.4 Analysis method

When it came to analyse the data from both the document analysis and the interviews, a thematic analysis had to be applied. In other words, noteworthy patterns, trends, practices, and elements of each of the five previously identified dimensions had to be highlighted, recorded, classified, and interpreted to be given meaning (Clarke & Braun, 2014). The thematic analysis of the manually coded data presented itself as the optimal technique to use in this case as this cost-efficient approach allows for the analysis of patterns of meaning that can be applied on a large scale (Herzog, Handke & Hitters, 2019). First, noteworthy elements each data text individually were highlighted to generate initial codes, before bringing together and categorising the codes across the different texts, creating thereby initial themes, before finally revising and improving these themes by going

once more through each text, defining, reviewing, and improving the identified themes (Braun & Clarke, 2006).

In this research, the thematic analysis was first conducted on the document analyses with respect to the five identified dimensions. Major themes with regards to the perception of movies, the Dutch film industry, and its contemporary transformation emerged. These perception themes were compared to the one identified in previous studies to make sense of how the Dutch transforming film production culture relates to how films are being perceived in The Netherlands.

Finally, the consumer interviews were also analysed to extract themes from these. As the interviews have been based on the five dimensions, it was known that the identified themes would relate to these theoretical concepts. However, a comparative analysis had to be done to establish how the consumers' emerging themes and the ones from the document analysis aligned. The data of the expert interviews were used in a confirmation and completion process to enhance the findings of the document analysis and bring together the professional/expert views of the Dutch cinema industry with the experience of the Dutch consumers.

Therefore, the analysis was set in the theory of the five dimensions defining cinema production culture. An exploratory touch was added to this thematic analysis by conducting not only a confirmatory research, set in coding consistency but also a comparative one in order to measure the relationship between the Dutch cinema production culture and the motivations of consumers for going to the movies. This thematic analysis resulted in the emergence of 13 themes within all five dimensions. Namely identified themes were *production budget*, and *financing a movie* within the first dimension; *regulations*, and *government's involvement* in the second dimension; *movie genre*, *people involved in the making of the movie*, and *theatre providers* for the third dimension; *technological appeal*, *VOD competition*, and *marketing a film* within the fourth dimensions; and *consumer's experience*, *appeal of Dutch movies*, and *movie content*, as part of the fifth dimension. More details are given about these results in the next chapter of this master thesis.

Finally, it may be argued that this thematic analysis ensures the trustworthiness, reliability and overall quality of the research at hand. Indeed, each step undertaken in this study was carefully considered and openly discussed before being initiated, which led to an overall comprehensiveness of the final report (Akkerman et. al., 2008). Last but not least, by

consistently comparing the data from this research to the ones obtained in previous studies, this thematic analysis was ensuring the acceptability of the research (Akkerman et. al., 2008).

4. Results

The following chapter of the master thesis is a report of the thematic analysis of the data obtained in both the document analysis and the consumer interviews. It aims at shedding light on the motivations of consumers for going to the movies and how they relate to the five dimensions of production culture. The analysis of the consumer interviews revealed that some dimensions of production culture are far more reflected in the motivations of the viewers than others. Therefore, the presentation of this chapter will not follow the previously established order of the dimensions but will rather be exposed by order of importance, going from the most prominent to the least significant to the consumers. Henceforth, the cultural history dimension (4.1) is first presented by the consumer's experience (4.1.1), before targeting the appeal for Dutch movies (4.1.2) and finishing with the motivation related to movie content (4.1.3). Following comes the production and distribution landscape dimension (4.2), which is divided by first studying technological appeal (4.2.1), followed by VOD competition (4.2.2), and finally marketing of a film theme (4.2.3). After this, the cinema landscape dimension (4.3) is analysed by the means of movie genre (4.3.1), people involved in the making of the movie (4.3.2), and theatre providers (4.3.3). To continue, the financial/state aid dimension (4.4) is focussed on with specific attention to production budget (4.4.1) and financing a movie (4.4.2). Finally, the last dimension of regulations/government policies (4.5) is studied through first the impact of regulations on the motivations of consumers (4.5.1) and the ones of government policies (4.5.2).

4.1 Cultural history dimension

Based on both data from the document analysis and the consumer motivation interviews, the cultural history dimension could be considered as the most important. Motivations related to the consumer's experience, the appeal of Dutch movies, and movie content are identified as themes composing this dimension.

4.1.1 Consumer's experience

The question of why people keep on going to the cinema theatres when they have an unlimited easy access to movies by the means of numerous VOD platforms yields a fairly simple answer: the experience the consumer is provided with in the theatres brings watching a movie to a different level. - “Movies are like a book plus, and cinema is like a movie plus, so a book plus plus” (Mark). – All interviewees in this research corroborated data from the document analysis by reporting that movies watched in the cinema are perceived differently due to the experience of going out and watching a movie with others in a dark theatre room (Film Research Netherlands, 2019).

With the growing crisis it amazes me to see how often I go to the cinema and how often people in general go to the cinema, how much of a bonding experience it is to go to the movies together and experience a story together. (Cosima)

In other words, spectators in theatre rooms are seeking an added value to the simple act of watching a movie, which manifest itself in various forms for each individual.

Aware of this, professionals of the industry are heavily working on improving the cinema theatres in The Netherlands (NL Film Fonds, 2019a). For example, a special interest is given to the seating situation, making chairs more comfortable and introducing Deluxe and VIP seats even if it led to a decrease of 3000 seats in total in the country, due to the wider size of the new improved chairs (PWC, 2018). Cinema theatres are betting on the numerous reports stating that consumers seek an experience more than a movie per se (Oliver and Raney, 2011; Austin, 1985). This risk is likely to pay off due to the fact that the current research conducted in 2020 still supports these older findings with participants stating: “I go to the cinema theatres to really experience the movie as a night out” (Helena).

Naturally, one might wonder what consumers entail by ‘experience’. When asked, the interviewees reported that going to the cinema is no longer a single event most of the time. Many expressed that watching a movie is a form of escape from their personal and daily lives, a source of enjoyment but also a form of learning. “Cinema tells stories that would otherwise not have been told, and it can really expand your world and your views, we know a lot about this or that simply because we’ve seen it in movies as kids” (Sarah). It was suggested by participants to this research that cinema and movies in general are quintessential to one’s social learning and formative of one’s character and views of the

world. Furthermore, they reported that they tend to go to the cinema with at least another person to be able to talk about the movie afterwards and overall enjoy watching it together. This is often coupled with having a drink and/or dinner before and/or after the movie. Eating popcorn and enjoying their beverage in the dark room was reported meaning to put them in the mood for the movie. Finally, on a more technical level, all interviewees consider the size of the screen and the quality of the audio as one of the reasons making the experience of watching a movie in the theatres special. Some added that the new ways of watching movies with enhanced technologies such as 3D, 4D, or IMAX, added to the experience, making it more immersive and enjoyable. This is a point of disagreement between the interviewees that will be discussed later in the next dimension. Overall, the participants to this research reported feeling all of the 12 identified motivations for going to the movies (Austin, 1985).

Consumers' definition of experience is very similar to the one provided by the data of the document analysis stating that consumers need four things to enjoy their experience, namely socialise, have fun, wellbeing and learning (Film Research Netherlands, 2019). Therefore, cinema theatres are currently offering the 'four S' to their visitors, that is Screen, Sound, Seat and Service to satisfy the visitors and provide them with an optimal experience (Film Research Netherlands, 2019). However, as people consume movies both for hedonic and eudemonic reasons (Oliver and Raney, 2011), it was added that these efforts might not be enough in the near future and there might be a need to personalise further the consumer's experience (Film Research Netherlands, 2019).

4.1.2 Appeal of Dutch movies

When looking at the list of the most popular movies of 2019 in The Netherlands, among the top twenty, only one Dutch movie was featured. Although there was no real crowd-pleaser from domestic productions, it was noted that the audience was relatively equally scattered among many Dutch movies (NL Film Fonds, 2019a). Overall, a rise of the audience for Dutch movies was also recorded (NL Film Fonds, 2019a), suggesting that local content is more and more appreciated, and Netflix might be right in its localisation policy (Akinola, 2019; Dias & Navarro, 2018).

Among the Dutch avid consumers of cinema, a clear trend emerged: Dutch movies are not at the top of the favourites list. "As a Dutch person you don't really hold Dutch

cinema in high regards, you know?" (Sarah). While some expressed their unlikelihood, others questioned their quality. This discrepancy of opinion contradicts Fu (2012)'s findings that genre preferences align within nations. This corroborates the document analysis data indicating that most people among the audience members do not believe that Dutch cinema will grow in the coming five years (Film Research Netherlands, 2019). Furthermore, data assuring that domestic movies are undeniably less popular than blockbusters coming especially from the Hollywood were recorded (PWC, 2018). However, some of the interviewees could see a certain appeal to domestic movies. "I really enjoy the Dutch humour in these movies" (Donnie). Most specifically, participants reported enjoying the directness of the movies, notably how they did not shy from showing nudity and sexual content in an overt way. "A quintessential Dutch movie to me has three things: a lot of tits, a lot of violence and a lot of swearing." (Cosima). Others appreciated to simply watch a movie in their native language, which implied not having to focus and enjoy Dutch expressions and ways of communicating. "I am partly deaf, so for me it is a lot more relaxing to hear Dutch in a movie because my brain does not have to focus on both listening and understanding" (Felix). People enjoyed identifying elements of their own culture in Dutch movies, which make for their appeal. Interestingly, this was not an opinion shared by all participants, as some expressed their discomfort to follow a movie in Dutch, a language they consider as less poetic and somehow 'not right' in movies. However, all indicated that they really enjoy seeing their country portrayed in foreign movies as it entertains them and makes them feel somewhat proud and "nationalistic". This data is in accordance with the findings Jewell and McKinnon (2010) on the satisfaction of observing one's country and culture in movies. Finally, a lack of originality within the Dutch movies was noted by all participants.

This discrepancy in demand and supply for Dutch movies goes against the localisation theory defended by the document analysis. Indeed, although local content may be enjoyed, the quality of movies and their storyline seem to be prioritised. Henceforth, the Dutch cinema industry may benefit from cutting back on quantity to rather focus on quality to redeem Dutch movies in the eyes of Dutch consumers (NL Film Fonds, 2019).

4.1.3 Movie content

When asked what might make them chose a Dutch movie over another one, all respondents indicated that they would not choose a film simply because it is a Dutch. “I always look at the storyline, if it seems fun then I go to the movie” (Beth). The consumer interviews indicated that the content of a movie is the ultimate motivation for watching a movie as it vouches for its quality more than any other criteria (Garcia-del-Barrio & Zarco, 2017). This is supported by the document analysis, which reported that matter of movie content is part of the discussion on the future of cinema. Professionals of the industry are aware of the power of a movie’s content on attracting the audience to the cinema theatres (Film Research Netherlands, 2019). When focusing on the future of cinema and how to ensure this medium will survive in the coming years, data indicate a recommendation to have as diverse of a content as possible within the same theatres (Film Research Netherlands, 2019). For instance, the screenings of live events in cinemas such as concerts, ballets, plays, Oscar ceremonies, etc. is positive for the revenues of theatres (PWC, 2018). Indeed, the document analysis confirmed that consumers enjoy cultural content when they go to the theatres.

I enjoy going to museums myself, I am a big fan of modern art; A lot of my friends are not, but they do go to the cinemas. So, I think it’s an easy way to also have a cultural experience. (Helena)

In other words, cinema may be considered as a form of art that cultivates one’s mind on the same level than any piece from a museum would.

Furthermore, data from this research indicate that VOD platforms are often criticised for the quality of their movie content. Although some interviewees noted an amelioration of this in the past few months, especially since the beginning of the COVID-19 crisis, many participants tend to prefer none-original content from the VOD platform, that is movies redistributed rather than produced by the platforms. To be more competitive, it appears essential for cinema theatres to keep on providing the best content quality possible. Focusing on local content and cultural content is a way to do so as is attracts a wider audience who can identify to the movie (Mayer, Banks, & Caldwell, 2009). In light of the importance of the successes of blockbusters, on which the entire Dutch theatrical industry relies (NL Film Fonds, 2019a), it appears strategically beneficial to produce and

distribute sequels (Dhar, Sun, & Weinberg, 2012) and movies engaging fans from an already popular fandom (Henkel, James, and Croce, 2015). This explains why more and more books are adapted (Haase, 2015) and local history movies are made (Diawara, 1992). This technique is justified by data collected from the interviewees who recognised to be stimulated by their fandoms. “*The Lord of the Rings* series is very special to me; I must have seen it like 30 times at least” (Paul).

To conclude, the consumer interviews revealed that the main motivation for choosing a movie regardless of the platform it will be viewed on is the content of the film. This criterion appears to be further highlighted when picking a movie to see in the cinema theatres. Going to the cinema is often perceived as an entire event and generally coupled with other activities before and/or after the movie. For the experience to be positive, the content of the movie is deemed essential. This is the reason why Dutch movies are an interesting case that brings a strong disparity of opinions. On the one hand the local content appeals to the Dutch consumers. On the other hand, it is often deemed of a lesser quality and less entertaining than movies from the United States.

4.2 Production and distribution landscape dimension

This second dimension may also be considered as clearly reflected in the consumer’s motivations for going to the movies as all participants highlighted the importance of technological appeal, VOD competition, and marketing of a film in their decision making.

4.2.1 Technological appeal

Noticeably, without being asked about any form of technology specifically, nearly all respondents mentioned the modern possibility to watch movies shown in 3D, 4D, and/or IMAX in the cinema theatres. It is important to note that the opinions on the matter of their added value to a movie were far from unanimous among the participants. Some expressed their love for it and their tendency to always favour the timeslot allowing them to watch the movie in a technologically enhanced form. Others, on the contrary, testified of a discomfort when facing these elements, which pushes them to either seek out a different time slot than their preferred one or to look for a different cinema offering the movie in 2D. “When I was a kid it used to be very cool, but then I got glasses and now it gives me headaches, so I never

go if the movie is in 3D” (Allison). Finally, some showed a complete indifference towards these new ways of watching movies, preferring to choose their movie based on the time slot they were available on regardless of the viewing conditions.

Despite this parity of opinions, it is undeniable that more and more cinema theatres are investing in these types of technologies. The document analysis revealed for instance that most investments in The Netherlands cinema theatres industry were targeting the multiplication of theatres and the improvements of the old ones with technological features. 2018 may be remembered as the year the 4DM seats and the matching 4DX technology were introduced in The Netherlands as well as Screen X, IMAX laser and IMAX 12-channel in various theatres across the country (PWC, 2018). In other words, investments are operated in various cinema theatres to improve the sound and vision quality for the consumer. This is likely to be fruitful in light of the data gathered from the consumer interviews, during which many reported that these technologies enhance their experience with the movie and immerse them fully in the story. This is why these types of technologies are so widely popular despite the additional price tag that accompanies them (Weinberg et. al., 2020; Efrat et. al., 2016). However, interviewees also admitted that certain genres of movies seem to be best suited for the added value of technologically enhanced experience while others are more enjoyable when focused solely on the storyline.

All of the horror movies that I go to are either in 3D or in 4D because it brings a whole new experience to the horror genre but if I go with my family to like a Disney movie then we don't use any of that. (Paul)

This analysis was shared in the document analysis by experts who recognise that they have to be mindful of the potentials of 4D.

Therefore, depending on one's taste in movie genres, the attraction towards enhanced technologies to experience movies varies. For those whose taste in movies also fits the technological advancements, the data revealed that they often enjoy it and sometimes even make it systematically part of their cinema experience.

I don't really enjoy watching movies normally without IMAX or 3D. I always try to find my movie first in IMAX, then I look for 3D and then I look for 4D options when I go to the cinema. (Felix)

4.2.2 VOD competition

It is impossible to talk about movies without being confronted to the topic of VOD platforms. Indeed, as of 2018, VOD platforms have officially surpassed the traditional cinema theatres with regards to their revenues and market share (NL Film Fonds, 2019a) confirming the suspicions of Hilderbrand in 2010 that VOD platforms would soon become the main source of home entertainment and the ones of Behrends and Fischl in 2005 stating that cinema would know its main competitor ever in the form of VOD technologies. Certainly, with the continuous significant decrease of illegal downloading and DVD/Blue Ray, VOD technologies occupy a significant place within the household (NL Film Fonds, 2019a). This is the reason why cinema theatres tend to open their own VOD platforms to remain competitive and reinvest the revenues from the platform into constructing a premium in theatres experience for the consumers (PWC, 2018). In The Netherlands, 160 VOD platforms have been recorded, the main ones being Netflix, Pathé Thuis, and Videoland (NL Film Fonds, 2019a). Participants to this research stated that they own at least one personal VOD account, sometimes going all the way to four accounts on four different platforms, all except one who had access to a friend's and his family's. The interviewees reporting watching movies on a weekly basis at least and are all heavy cinema goers reinforces the data from the document analysis that suggested that frequent VOD users are also frequent cinemagoers (Film Research Netherlands, 2019).

Participants to the study all revealed that they prefer watching a movie in the cinema over watching a movie on a VOD platform. In their opinion, cinema theatres bring something extra to the movie experience. "Going to the cinema is very important to me, you do not get the same sensations from a movie on VOD, it does not resonate with you in the same way" (Cosima). This finding is in line with an unpopular opinion that VOD platforms are in fact not a danger to the cinema industry but rather enhance the demand for cinema (Henning-Thurau, et. al., 2007). Despite the rise of VOD platforms, which are predicted to keep on growing in the coming years, the cinema theatres are still increasing

their box-office every year by 2 to 3%, a trend that is expected to continue thanks to blockbusters (PWC, 2018).

All interviewees reported that their usage of VOD platforms was infinitely different from their cinema habits. For instance, many testified that choosing a movie to watch in the cinema is a more careful process than picking a movie to watch on a VOD platform. They justified this difference based on the time investment that going to the cinema theatre represents - "On Netflix I can just play a movie, if after 10 minutes I don't like I can always stop, it's a lot harder to walk out of a theatre room during the movie" (Sarah) - , the price tag attached to the purchase of a cinema ticket, and the type of movie selected. The interviewees also reported considering whether a movie is worth seeing in the cinema or if it is better to wait a little bit longer and see it on VOD a mere few weeks later. This type of thought is made possible by the theatrical windows becoming shorter and shorter leading to consumers being less motivated to make the 'effort' physical and financial to go to the cinema theatres (Film Research Netherlands, 2019) whilst VOD platforms have shown to provide the viewer with a freedom of scheduling and a freedom of movement and equipment (Mikos, 2016). This is why when discussing the future of cinema, it was often mentioned in the documents studied in this research that theatres might have to learn from VOD platforms especially with regards to integrating, consolidating, and differentiating the audience engagement and reward systems (Film Research Netherlands, 2019). To this extent the All Stars loyalty programme set by Pathé may be a relevant strategy (PWC, 2018).

4.2.3 Marketing a film

In order for a movie to be seen, people must be aware of its existence. Caldwell (2008) has found that distribution is in fact as important for the success of a movie than is its production. First, professionals of the cinema industry must be made aware of a film, this often happening through film festivals (NL Film Fonds, 2019a). Later, a movie must be distributed to a larger public and marketed to the audience to attract them. In the document analysis, one key trend that is harmful to the industry at the moment was highlighted; the fact that movies are often marketed long before their actual release date and suddenly no longer mentioned once they are available on the screen (Film Research Netherlands, 2019). This tendency is harmful as interviewees testified that they often go to a movie if they hear about it, or if it is recommended to them. In addition, consumers also

noted that they usually plan their cinema outing at the last moment or within a week at most prior to their visit. Therefore, it is recommended to extend the information about the movie as much as possible beyond the release date and focus on conveying the marketing of a film through mobile phones (Film Research Netherlands, 2019). Furthermore, as consumers are becoming more and more amateurs of video technology, introducing VR in movie marketing campaigns might prove to be a very inclusive and experiential way to raise awareness for an in-coming movie and ensure a big buzz (Film Research Netherlands, 2019).

In conclusion, it was found that remaining competitive and existing in an increasingly busy film sector is a challenge for both VOD platforms and cinema theatres. Certain techniques may be employed to overcome these issues, namely focusing on providing high-quality content to the consumers. Overall, it is advised to cinema theatres to adopt a new business model to market movies that they are distributing and to keep on promoting movies after their release date rather than focusing only on beforehand marketing (PWC, 2018). Aware of this, cinema theatres pay particular attention to new technologies while VOD platforms focus on content exclusivity.

4.3 Cinema landscape dimension

With a population going on average 2.1 times a year to the cinema, it is very important for the Dutch theatrical industry to identify the motivations that push people to go to the movies (NL Film Fonds, 2019a). As Austin (1985) stated motivations may vary per groups, it is also interesting for them to note that people between 40 and 54 years old are the fondest of cinema while the younger generation between 16 and 23 years old represent the highest share of cinema admission (NL Film Fonds, 2019a). However, the attendance of this specific group is decreasing, a fact that professionals of the industry worry about as young people must be hooked to going to the cinema early on in life reiterate this behaviour later on (Film Research Netherlands, 2019). Through the analysis of the data related to cinema landscape dimension, many motivations for consumers to go to the movies were identified. Motivations related to movie genre, people involved in the making of the movie, and theatre providers were extracted from the consumer interviews conducted for this research and discussed in this section. As per the previous dimensions, the data is added to the one from the document analysis and results from previous research.

4.3.1 Movie genre

As mentioned earlier, consumers tend to view various genres of movies on different platforms. In this instance, the interviewees separated themselves into two clear groups, those who only considered going to the cinema for commercial action movies and/or horror movies and those who on the contrary preferred watching independent art house movies in the cinema. The document analysis revealed that the majority of Dutch people belong to the first group category. Indeed, in 2018, it appears that box office breaking records were reached thanks to blockbusters releases in the second part of the year while an overall increase of the ticket price by 4.3% was recorded (PWC, 2018).

Although the interviewees differed in terms of their genre preferences, in light with Redfern (2012)'s findings that different groups like different genres, all agreed that the genre of a movie is a direct criterion in their choice of a movie. They went further by explaining that watching their favourite movie genre in the theatres simply highlighted their preferred features and rendered the experience more enjoyable and more intense. For instance, watching a horror movie in the cinema made the movie itself creepier due to the dark atmosphere, the other spectators screaming, and the enhanced audio. On the other hand, watching an independent and/or art house movie in the cinema reportedly enables the viewer to dive deeper into the story, feel more involved, and hopped by the story. People enjoy different movie genres and use that criterion as a prime motivation when choosing a movie to watch. "I only go to Horror movies in the cinema because I think that these experiences are best seen on a big screen as opposed to like romance movies that are a bit awkward to see in the cinema" (Felix). The document analysis suggested that it is essential for cinema theatres to play both blockbusters that are fruitful for the revenues of the theatres and on which depends the yearly box office as well as 'original titles' that will attract a different audience (Film Research Netherlands, 2019). By doing so, cinema theatres target an extremely wide range of audiences.

4.3.2 People involved in the making of the movie

The importance of stars and overall famous names attached to the making of a movie is a topic that has long been argued in the cinema industry. As expressed in the theoretical framework chapter, any person involved in the production of a movie has an

impact on the final product delivered (Caldwell, 2008). However, beyond influencing the content of a movie on a cultural level, researchers have long fought over the true effectiveness of the Star Power system (Basuroy, Chatterjee, & Ravid, 2003). When asked, the interviewed consumers all reported having favourite stars that they admire and look forward to seeing in movies. Some of them had seen all movies from their favourite stars such as Jacky Chan or Woody Allen to name a few, verifying De Vany and Walls (1999)'s findings concerning the fact that directors have an influence on the audience attraction although to a lesser extent. Indeed, while names such as Woody Allen or Tarantino were mentioned among the favourite directors, a lot of interviewees also revealed that they do not care so much about directors and tend to focus more on the actors and actresses of the movie. They explained their tendency to prefer movies with big stars by stating that big experienced stars tend to deliver a better performance, therefore raising the overall quality of the movie. This is a finding in line with Elberse (2007)'s work on the success of the star power system.

Interestingly, however, despite acknowledging their attraction towards some celebrity's work, the interviewees revealed that star power is, in fact, obsolete if a movie is not outstanding on other levels. Indeed, none of them seemed willing to go blindly to a movie simply because their idol was involved in it. Instead, all testified that they first check what the movie is about, and often check the reviews of the film before going. "I see the trailer, or I look up on IMDb for reviews and ratings and actually based on that I pick the movie, if the actors that I like are in the movie, then it's just an added bonus" (Allison). Therefore, a film's content and reviews are in fact some of the most relevant consumer motivations for going to said film. This is a finding in line with Basuroy, Chatterjee, and Ravid (2003), opponents to the star system's frenzy of other academics and professionals of the cinema industry. When developing further on the reviews of movies that they consider before going to a movie, the interviewees once again separated in distinct groups, some preferring official press reviews and others favouring audience reviews. In the small sample of participants gathered, most of them belonged to the second group. Although a bigger sample would need to be used to properly verify that fact, this trend is in accordance with the findings of the document analysis that reviews from fellow viewers matter most in the motivation to see a movie. Press reviews are often seen as too specialist, cinephile and overall tend to favour independent movies to the big commercial blockbusters that interest

the audience most, whilst recommendations from influencers are often suspected of being paid for and unauthentic (Film Research Netherlands, 2019).

Therefore, data from the consumer interviews reported that although star power is not a proper motivation for watching a movie, it is an element that might tip the balance towards a movie more than another one of similar quality and content. Thus, once the true motivators of movie content and reviews are met, star power might influence the final decision. However, all interviewees reported that they do not mind watching movies with unknown actors.

4.3.3 Theatre providers

With regards to the cinema theatre providers in The Netherlands, one clear player stands out from the others: Pathé. Although not the only chain of theatres in the country, it possesses by far the biggest share of the theatrical market in The Netherlands (44.4%) even if art houses and independent cinemas account for more screens (513 screens to 458) (NL Film Fonds, 2019a). Interestingly, interviewees reported mixed feelings towards these big commercial theatres. Whilst some only considered going to big and modern cinema centres, others preferred smaller competitors in the form of independent and/or art house cinemas.

While sometimes a cinema theatre is chosen due to its location and/or its proximity from the interviewee's home, more intrinsic motivations were also revealed in the choice of a cinema theatre. For instance, Pathé presents technological advantages that many enjoy and consider to be a part of the experience of watching a movie. Other interviewees expressed discomfort with the crowds of the big Pathé as well as a dissatisfaction with their programming. Instead, they favoured smaller independent theatres, in which they feel more comfortable and warmer and in which they can watch movies that tend to interest them more. Certainly, the type and genre of movies showed was reported to alter depending on the venue, which also influences the consumer's choice as previously explained. People are increasingly searching for passion and genre niches, which brings them to go to the theatres that offer what they are looking for (Film Research Netherlands, 2019). That is to say, people consume cinema in a very selective manner, going essentially to the movies and theatres that fit their taste and personality, entirely ignoring other forms of cinematic entertainment.

The document analysis also revealed that people are more motivated to go to cinema theatres that practice dynamic pricing, that is the possibility of booking tickets ahead of time and with less preferable seats being cheaper (Film Research Netherlands, 2019). Although no mentions of this were made in the interviews, interviewees expressed different reasons pushing them to choose a venue over another one such as the membership system. This confirmed the previous findings of Ebbers and Wijnberg (2009) that membership programmes and systems acute the loyalty of consumers. The document analysis revealed that the cinema theatres in The Netherlands are well aware of this fact and try to improve this system further and further with notably the creation of the Pathé All Stars programme, which comes as an addition to the Pathé unlimited and Pathé unlimited gold cards (NL Film Fonds, 2019a; <https://www.pathe.nl/allstars>). The desire to be faithful to a cinema theatre can also be expressed differently. For instance, some of the consumers who reported liking smaller independent art house cinema theatres better also expressed their wish to support these types of institutions by visiting these venues rather than the big commercial Pathé ones. Incidentally, this reason also justified for a few of them the desire to pay for an individual ticket every time they went to the movies rather than subscribing to a membership system. “I feel like I’m doing my part in a sense in supporting the art-houses by pay for my ticket every time” (Cosima).

To conclude, there are various motivations related to the cinema landscape that bring consumers to the cinema theatres. On a pragmatic level, the theatre venue matters in the decision making, most specifically with regards to the location and the type of movies they show. In this respect, the movie genre also has a strong influence on the consumer’s motivations. Finally, the data from this research revealed that although a famous name attached to the making of a movie might make the film more enticing, it is not a motivation strong enough to participate fully to the decision to watch a movie. Instead, reviews are essential and often one of the first thing considered when deciding which movie to go to.

4.4 Financial/state aid dimension

The following dimension may be considered as essential to the making of cinema as both making movies and constructing cinema theatres requires subventions and financing. Consequently, the data from the document analysis on the matter was very extensive.

However, in the consumer interviews, it appeared that only the matter of budget was a relevant motivation for going to a specific movie. The interviewees were not aware or did not mind how a movie was financed. Therefore, in this dimension, two themes appeared, only one of which is a proper motivation to go to the movies: production budget and financing a movie. The budget theme will be discussed first as it is also a proper consumer motivation followed by the more hidden aspect of the cinema industry's work.

4.4.1 Production budget

The participants to this research do not see all movies as equal in terms of quality. As previously expressed, this quality gap may rest in the genre of the movie, the story/content, the technological prowess, and/or the people involved in the making of the movie. However, many seemed to consider that all these aspects may be combined under one element: a movie's production budget. "I think at the end of the day if there was no budget there would be less quality to the movie" (Mark). Indeed, many interviewees estimated that a big production budget might enable the filmmakers to spend more time on the movie, improving its quality. They also mentioned that it enabled the hiring of more famous and/or talented actors and directors, an interpretation that was shared in previous research (Ibnaal Asad, Ahmed, & Rahman, 2012). Therefore, interviewees seemed to consider that an extensive production budget is a great advantage for a movie. In fact, many expressed their reticence towards Dutch movies compared to Hollywood movies justifying it by a lack of budget for Dutch productions. "They [Dutch movies] are just not as good because The Netherlands are not as experienced or as grossly budgeted as bigger movie production company" (Mark). Certainly, this observation revealed itself fairly accurate in light of the fact that Dutch productions amount to only 7.2% on the box office revenue when US movies represent 74.6% in The Netherlands (NL Film Fonds, 2019a). This is reflected in the general recent trend of people no longer going to well-reviewed, mid-budgeted movies in the cinema but rather favouring big blockbusters (Film Research Netherlands, 2019; Ravid, 1999; Elberse, 2013). As investors primarily aim to make money with movies (Pillania, 2008), the Dutch film industry is facing a draw-back of subventions every year due to an overall decrease in the production value of Dutch movies (NL Film Fonds, 2019a).

However, interestingly, when asked directly if they thought that a bigger production budget assures a better movie, all of interviewees stated that a movie with a small

production budget can also be good. Caldwell (2008) explains this discrepancy by the fact that cinema may be considered as both an art and a business. That is to say that good movies may emerge from less subsidised projects. This is illustrated by the fact that Dutch movies are still somewhat domestically popular and were selected in 1248 film festivals around the world, earning 226 international prizes in the process in 2018 (NL Film Fonds, 2019a). Although production budget is seen as not entirely necessary to make a good movie, consumers still attach a lot of importance to it and consider it as part of their motivation for going to the cinema. "Movie theatres are usually this big sparkly thing that fits big-budget movies and then you have Netflix, which is a bit less sparkly for the other movies" (Felix).

4.4.2 Financing a movie

Through the document analysis, it became apparent that any type of movie from (co)production cinematic films to feature-length documentaries and animated films may apply for a grant from The Netherlands film incentive, one of the most important grants delivered for film in The Netherlands. Conditions of selection rely on aspects such as being represented by a legitimate producer with experience in the past seven years that is established in a country in accord with European rules. Furthermore, the minimum production budget estimation for the film is also considered in the selection process as movies applying must have a minimum production budget of 600 000 euros. Finally, at least 50% of the production budget must already be allocated upon application. If selected during either of the two-yearly selections, a movie may receive up to 35% cash rebate, or 1.5 million euros, which is subject to Dutch taxation. Naturally, there are conditions accompanying every fund received regardless of the source (Joshi, & Hanssens, 2009). This is also the case for the film incentive fund, which requires for the movie produced to be distributed at least in The Netherlands. Furthermore, a certain amount of the allocated fund, determined by the production costs, must be spent on parties that are subject to Dutch taxation.

Looking closer into the Film Fund itself, it appeared that this institution gathers money from various sources every year such as government support and revenues on previous investments and reinvest it primarily in movies but also professionalising talents and educating the Dutch population (NL Film Fonds, 2019b). This is how, in 2020, the Film

Fund held 19.25 million euros to distribute to film productions (NL Film Fonds, 2020) and received 2.4 million euros from the government to focus on its other projects (NL Film Fonds, 2019b). Naturally, the Film Fund is not the only means for movies to obtain funding. Other investors may be found in funding from TV (Behil, 2010), crowdfunding and private investors (Derin, 2010) and other funding associations such as Fund NL (Film Research Netherlands, 2019). In the coming years between 2021 and 2024, less money will overall be available for funding movies directly as a general effort from the government is made towards financing extra space for film projects, talent development outside of direct production process, improving the connection between supply and demand in the country, and increasing diversity of production (NL Film Fonds, 2019b). This will lead to a policy of more money for less film so as to insist on the quality rather than the quantity and hopefully redeem and re-popularise Dutch cinema in the eyes of the audience (NL Film Fonds, 2019b). This policy might prove to be successful as it allows to focus further on all the elements mentioned in the cinema landscape dimensions (Garcia-del-Barrio & Zarco, 2017).

To conclude, movies require financing in order to exist and be able to make their own revenues through box office and other means of distribution. Gathering a big production budget is a great asset for a movie as it provides it with better chances to raise its quality. A consequence of this trend is that audience members have learned to expect more from bigger production budget productions and tend to favour them over smaller projects. However, cinema being both a business and an art form, movies with small production budget may also reach high levels of quality and popularity.

4.5 Regulations/government policies

This last dimension revealed itself as the least important in terms of its reflection on the motivations of the consumers for going to the cinema theatres. Two main themes emerged from the data, namely the role of regulations and the role of the government's involvement. However, as was the case in the previous dimension, only one of these identified themes is actually related to the consumer's motivation for going to the cinema theatres: regulations.

4.5.1 Regulations

A first element that appeared in all interviews was the fact that every consumer knew of regulations from Kijkwijzer. Although, most of them showed confusion about what was meant by the term 'regulation' in the question, suggesting that the participants do not have the fact that there might be rules limiting their access to content at the for front of their mind. Nonetheless, it has been established that governments can influence how and why movies, among other forms of expression, are done the way they are (Szczepanik & Vonderau, 2013). While all participants testified of their knowledge of regulations, a few participants mentioned that they were unaware of the origins these rules were, may it be governmental or from independent institutions.

The document analysis enabled to answer that question as it made obvious that Kijkwijzer is a combined effort between cinema associations and the government. The main role of the government remaining to ensure that the regulations are respected in public theatres (<http://www.kijkwijzer.nl/organisatie>). Many of the interviewees observed identity checks before entering a cinema rooms for movies with more important Kijkwijzer restrictions than other. A noticeably story being one of the interviewees being denied access to the movie Deadpool, which was a 16-year-old rated movie because he had forgotten his ID that would justify that he was above the age limit. "We had to go see another movie because I was stupid enough to forget my ID card and they would not let us in" (Felix). On the other hand, another interviewee indicated that as a child she would often go to the cinema with her parents and would always be allowed in the rooms even when she did not meet the age requirements, as long as she was accompanied by her guardians. "The Dutch are very liberal with that, these are just warnings, but you can do whatever you want with your own children" (Cosima). Naturally, this reports events from a decade ago, which may suggest that the government has been tightening its policies ever since. Other interviewees noted that the identification checks are more common in big theatres chains such as Pathé than in smaller independent cinemas.

Sundholm (2012)'s findings on the fact that the rating system for movies is illustrative of its country's value system are well illustrated by this evolution of The Netherlands' Kijkzizer regulations system. Indeed, all interviewees stated that they are rather satisfied with the system of their country as it is not too prude. "It's good to show these kinds of things because it is an art form and it is the real world; It is there, and it is pure" (Helena). Many reflected that due to the amount of nudity in Dutch movies and the

overall open-mindedness of the Dutch culture towards sexuality, a very strict rating system might be counter-productive and somewhat hypocritical. “It’s not necessary to protect the children in that way anymore because if they want to see it, they will see it anyway elsewhere” (Donnie). Finally although all of them expressed their current dis-interest for the regulations system, which does not concern them as they are all above 16 years old, many testified that they are happy that the system exist and fully intend to make use of it once they are parents themselves.

4.5.2 Government’s involvement

Beyond the knowledge of official regulations regarding the recommendations and restrictions of access to movies, participants reported having no awareness of the involvement of the government in the matters of the cinema industry. “I have no idea how that works and to be honest I was never really interested in it either” (Allison). However, the document analysis undeniably showed that the government has in fact a strong involvement in the cinema industry as a facilitator and supporter of the medium and the art.

In The Netherlands, the government has provided substantial funds to various receivers to promote cinema. For instance, between 2021 and 2024 the government has committed itself to providing financial support to film festivals to enhance experimentation with movies. This is done by implementing more space to experience outside of the production process. The government also hopes to develop new talents among Dutch people through skill labs and writers’ rooms to re-boost the Dutch film industry (NL Film Fonds, 2019b). Many of these reforms of sort came from an effort to meet the requests of Dutch filmmakers who felt pressured to produce content with a unique commercial goal (Dijksterhuis, 2019). It may be argued that this financial help provided by the Dutch government illustrates the intrinsic motive of promoting national labour that Coles (2010) described as characteristic of the motivations and conditions for governmental support. This is further illustrated by the heavy governmental financing of the main four film festivals of The Netherlands: IFFR, IDFA, Cinekid, and Netherlands films festival.

The financial efforts and commitment to film showed by the Dutch minister of culture Van Engelshoven is a good illustration of Loboto (2009)’s findings that governments primarily finance movies treating of cultural matters. Indeed, the minister stated that she is intending on protecting the strong signature of Dutch movie makers (Dijksterhuis, 2019).

“The minister is looking for ‘a broad package of measures to promote the individuality and quality of Dutch film’” (van Engelshoven in Dijksterhuis, 2019). This is why the Film fund is among the prime receivers of the heavy governmental financing for film education purposes (Government of The Netherlands, 2018; Dijksterhuis, 2019). Although plans are made to allow more space for experimentation, education and un-rushed projects, there have been, as of yet, no concrete implementations to show for. Furthermore, many within the industry still criticise the minister for not yet acknowledging many of the film-makers issues. For instance, the government is not yet responding to the requests for a levy on streaming platforms that would generate more revenues for the film sector (Dijksterhuis, 2019). There are also no plans to install screening quota for Dutch movies on any streaming platforms.

To conclude, while both the findings from previous academic research and the document analysis have made undeniable that the involvement of governments in cinema matters cannot be underscored, Dutch consumers seemed to be rather unaware and/or uncaring of the government’s role in the production and distribution of movies in The Netherlands, beyond a potential participation to the Kijkwijzer criteria settings.

5. Conclusion & Discussion

This final chapter of the master thesis aims at summarising the results from this research to assess their outcome and meaning for the Dutch cinema industry, as well as for the current debates occurring in the academic world over that industry and film production culture in general. By discussing the implications of the data gathered in this research, conclusions are drawn. A final answer will be provided to the research question of this thesis, namely: *How is the transforming film production culture in The Netherlands reflected in consumers' motivations for going to the movies?*. This is achieved by first recapitulating the outcome of the research (5.1) before considering the implications that they represent (5.2) especially with regards to the theoretical implications (5.2.1) and the societal and practical implications (5.2.2). Following this, the limitations of this research (5.3) are considered. Finally, recommendations for future research based on the results and limitations of this study are discussed (5.4).

5.1 Outcome of the research

From the consumer interviews analysis, eight motivations for going to the cinema theatres emerged, namely experience, content of the movie, technological appeal, movie genre, people involved, budget, theatre provider, culture in a movie. Overall it appeared that the main motivation for watching a movie regardless of the platform used is the content of the movie, that is its storyline, genre, budget, cultural elements, and the people involved in its making. Therefore, the combined efforts of the Film Fonds and the Dutch government to raise the quality level of Dutch movies is a good strategy to render domestic cinema more popular (Film Research Netherlands, 2019). On the other hand, the main motivation for travelling all the way to a cinema theatre and paying a ticket entrance is the experience in and surrounding the cinema theatre. In other words, the participants in this study rarely go to the cinema theatres out of sheer attraction for a movie but rather expect to be met with a special experience going beyond the movie itself. This is often translated by watching a film with special enhancing technologies, purchasing beverages and snacks, as well as turning the cinema visit into a social outing coupled with drinks and/or dinner prior- or post-movie. In this prospect, the important investments that the Dutch theatrical

industry is making on renovating theatres and equipping them with technological experience enhancers, participates to making it stand out against its prime competitors: VOD platforms (NL Film Fonds, 2019). Interestingly, this research also revealed that people with similar movie tastes tend to like the same way of experiencing a movie. For instance, the participants who revealed enjoying action and horror movies also reported being big adepts of technologically enhanced experiences in the form of IMAX, 3D, and 4D. On the other hand, participants who preferred art house movies and romantic comedies tended to favour movies shown in 2D or IMAX at most. This highlights further the necessity for cinema theatres to have a diverse range of movie genres and screening times to ensure that consumers can all find entertainment in their favoured form in the cinema theatres (Film Research Netherlands, 2019).

These motivations shared by all participants although to various degrees depending on their personal taste are reflected in all the five dimensions of production culture except for one: Regulations/Government's policies. Considering that all these motivation factors often interrelate within the dimensions, film production culture is reflected in the consumer's motivation for going to the movies. Indeed, despite a lack of reflection of the regulations/government policies dimension in the consumer's motivations, it may be assumed that different age groups might take into account age regulations when choosing a movie. Therefore, the absence of motivation reflected within the second dimension of production culture may be due to the sample of participants to this research that does not currently have a need for it.

Finally, the case of domestic movies also gave way to compelling findings. Indeed, while Dutch movies are recognised around the world on the festival scene and winning many prizes every year (NL Film Fonds, 2019), the interviewees reported a dislike for their domestic cinema, or to at least admitted to not valuing it in high regards. This was partially found to be due to the influence of big American blockbusters with high budgets (PWC, 2018). Indeed, the interviewees have learned to expect a lot from big-budgeted production and tend to consider that a lesser budget will likely affect the quality of a movie. This explains why big blockbusters are the main movies watched in the country every year while smaller-budgeted domestic movies struggle to reach the top 20 (NL Film Fonds, 2019). This is especially interesting due to the fact that the local cultural content strongly appeals to consumers (Schäler, 2003). Nonetheless, they are often deemed of a lesser quality and

lesser entertainment value because of their limited budget. Despite a clear scepticism from the audience towards domestic movies, the Dutch government still heavily invest in these movies in the hope to educate and convey the Dutch culture to the public (Dijksterhuis, 2019). This dichotomy of opinions suggests that certain measures, which will be discussed in the following section, must be taken to redeem domestic cinema in the eyes of the public and to justify the investment that it receives.

5.2 Implications

Naturally, all these results have underlying meanings that are interesting to consider in order to draw meaningful conclusions answering the research question posed in this thesis. Indeed, the qualitative trait of this research does not only aim at confirming whether a relationship exists between production culture and consumer motivations for attending cinema theatre, but also at determining the nature of this relationship.

5.2.1 Theoretical implications

On an academic level, it may be said that this research participates in several theoretical debates about the cinema industry. To begin with, it may be argued that this study extended the understanding of film production culture, as a new conceptualisation of this notion was created from the deductive reading of four sources (Caldwell, 2008; Mayer, Banks, & Caldwell, 2009; Lobato, 2009; Szczepanik & Vonderau, 2013). These four pioneer works were brought together in order to encase all aspects of production culture in one framework. This new framework dividing production culture into five dimensions proved to be not only inclusive but to also be reflected in consumer's motivations for going to the movies. In other words, the conceptualisation of production culture effectuated in this study enables to shed light on the reflection of the film industry in a given country on the audience members' motivations, preferences and demands. It operates on domestic and international levels and provided an intrinsic basis to build this study upon. Therefore, it is believed that research on a nation's film sector may widely profit from using the conceptualisation of production culture established in this study.

Moreover, this study highlighted the fact that researchers should consider further cinema industries and not only the Hollywood industry. Indeed, most research on the topic of cinema consider the American system (Kumb, Kunz, & Siegert, 2016). Others group many

nations into one by studying European or Asian cinemas for instance (Kumb, Kunz, & Siegert, 2016). This study has demonstrated that each nation is unique in its own form of cinema due to the fifth dimension of production culture, which deals with the historical and cultural accounts that are reflected both in movies and in consumers' tastes, expectations, and demands. Therefore, along the line of Caldwell (2008)'s thinking, the data from this research would suggest to proceed with caution and to rather consider countries individually with regard to their production culture and their domestic cinema. A clear discrepancy between the significant success of Dutch productions in the festival industry as opposed to the reticence of the Dutch people towards their own domestic cinema makes it an interesting case to consider (Film Research Netherlands, 2019). All the previously exposed strategies applied by the Dutch industry to overcome its flaws, further accentuate the necessity to contemplate nations individually. Indeed, the issues faced by the Dutch industry are unique to this nation, and the strategies established differ from how another country might have faced similar issues. Therefore, it can be argued that this master thesis challenges the academic tendency to group together nations to study their film sector and to seldom step away from the analysis of the Hollywood system.

Another debate that this research brings nuancing to regards the relationship between cinema and VOD platforms. The relationship between the two is seldom studied in detail and fail to consider how blurrier the line separating cinema from VOD productions is becoming. Indeed, it was found that most suggestions given to improve the production culture of cinema and the overall quality of movies may be applied to both the cinema industry and VOD platforms. Furthermore, VOD platforms are attempting to enter the traditional means of distribution to be eligible for nominations to prizes and recognitions, while cinema theatres are trying to compete on the VOD level by creating their own platforms (NL Film Fonds, 2019). Henceforth, this research argues that while VOD and theatrical platforms remain competitive in essence, considering them both as being part of the Cinema industry rather than systematically posing them as separate entities, might be a more modern and accurate conceptualisation.

To conclude, this study brought many nuances to current academic conversations about the changing film industry and its effect on consumers' motivations for going to the movies. Most importantly, the conceptualisation of production culture established in this research is a solid model to understand a nation's cinema industry, and its larger

implications. Finally, it was highlighted that updating the perception of cinema industry to incorporate a VOD branch to it might be a right contemporary representation of the international cinema sector.

5.2.2 Societal and practical implications

On a practical level, the participants to this research reported considering the content of movies as the most important decision factor when picking a movie regardless of the platform they used to do so. Furthermore, it was confirmed that motivations for watching movies are based on both eudemonic and hedonic reasons (Oliver & Raney, 2011). Consequently, it is found that both VOD platforms and traditional cinema productions should focus on improving the overall quality of the movies they provide (Film Research Netherlands, 2019). This may be achieved through various means, namely improving the content, focussing on genre-appropriate technology enhancements, and concentrating the production budget (Film Research Netherlands, 2019). The document analysis revealed that these measures are often discussed themes in conversation about the future of cinema (Film Research Netherlands, 2019). Therefore, the Dutch cinema industry is already slowly incorporating these new measures in its domestic productions (PWC, 2018; Dijksterhuis, 2019). However, a long list of “stupid comedies” and low-budget productions of low quality has rendered the interviewees wary of their domestic cinema. Therefore, it is suggested that following the previously exposed elements to improve the quality of Dutch movies appears essential for the survival of the domestic cinema industry of The Netherlands (Film Research Netherlands, 2019). Furthermore, it may also be argued that the current strategy of the Film Fund to refocus grant distribution in order to finance fewer movies but with more money may show to be extremely beneficial (NL Film Fonds, 2019). Indeed, data from this research reveals that Dutch consumers are likely to be attracted by big-budget Dutch productions of quality, especially if it portrays an interesting storyline filled with historical and/or cultural references to The Netherlands as well as talented famous actors and directors. These elements are important to take into consideration for the future of Dutch cinema production.

Furthermore, this research highlighted the necessity to improve the overall marketing of movies (Film Research Netherlands, 2019). Although star power might influence the balance towards a movie rather than another one if they are of equal

qualities, it is not a prime criterion in the decision process making when selecting a movie to attend. Therefore, rather than advertising movies based on the actors who star in them, it is advised to focus the marketing on the storyline and the quality of the movie instead. In light of the technological developments around the world in all types of industries, it was also found that advertising strategies for films might have to increasingly focus on interactive and mobile marketing. Most importantly, it was reported that while movies are usually advertised up to the point of their release date, the interviewees mostly plan their cinema visits in the spur of a moment. Therefore, it is essential for movies to still be at the forefront of consumers' minds while they are in the theatres to attract visitors (Film Research Netherlands, 2019). Instead, cinema theatres are currently betting on the fact that prospecting visitors will stumble upon a movie while checking what they would like to see in the theatres. This suggests both that marketing strategies should be extended until after the release date of a movie, and that cinema theatres should provide the public with an attractive experience pushing people to come back (Weinberg et. al., 2020). In this prospect, it is essential for the theatrical industry to properly determine which movies to enhance technologically to improve the experience of the consumers, as not all genres are fitted for 3D and 4D distributions. This is a process that the production sector can help with as targeting a movie for enhanced technologies usually leads to a better quality of the consumer's experience (Film Research Netherlands, 2019). The partnership between production and theatrical sector may prove to be fruitful for the box office. However, to maximise said box office revenues, it is essential to distribute a broad range of movies to consumers, to ensure that every visitor finds something pleasing to their personal movie taste (Film Research Netherlands, 2019).

To conclude, it is safe to say that a strong relationship has been established in this research between film production culture and the motivation of consumers for attending movies in the cinema. Indeed, altering the production culture, especially within the three most reflected dimensions (history and culture of films; cinema landscape; production and distribution landscape) in the consumer's motivations for going to the movies is a sure way for the film industry to remain competitive and relevant in the entertainment sector. Overall, this research reported that there is still added value for going the cinema and it will remain that way if the theatrical industries adopts the right transformations in their production culture.

5.3 Limitations

Naturally, this research is not without its limitations and drawbacks, which are important to note as they influence the research process and hence the final results and conclusions. As mentioned in other chapters, the main setback for this research was the COVID-19 crisis. First, interviews had to take place through conference calls instead of face-to-face, which might have impacted the relationship between the researcher and the participants and altered the depth of the data gathered. More significantly, expert interviews had to be abandoned entirely depriving this research of what might have been valuable insights going beyond the document analysis' data. Furthermore, with the impossibility to sample as originally planned, a call for participants had to be placed on social media platforms. Naturally, due to the personal network of the researcher, the participants found were all in their twenties, which may influence the result of the research. Indeed, as expressed earlier characteristics such as age can influence movie genre preferences as well as motivation factors for going to the movies. Furthermore, it may be assumed that people in their twenties are rather tech-savvy. Therefore, their relationship with the technologically enhanced experience of movies might differ from the one of the older and younger generation. In other words, it might be interesting to consider how the tech-savviness of a generation might influence their motivations for going to the cinema theatres and watching the film in their preferred viewing format.

Finally, the last limitation that was faced during this master thesis is the lack of information available in English about in-depth strategies, visions, and overall data on the Dutch cinema and theatrical industries. The researcher being of foreign nationality, her lack of knowledge of the Dutch language limited the range of documents that could be accessed. Only two short documents were considered in Dutch, which were necessary to cover the second dimension (Regulations/Government policies). Although these two small articles could be understood by the researcher, covering longer, extended, and technical sources would have been a true challenge and might have imperilled the research itself through incorrect translations or misunderstanding of certain variables. It may be assumed that considering Dutch sources might have yielded more in-depth data.

5.4 Future research

Beyond expert interviews, various age groups among the participants and documents in the Dutch language, it might be interesting to consider for future research, further suggestions. For instance, one might be interested in comparing the data from The Netherlands to another country. Indeed, each country possesses its own cinema industry, and although some trends might be international, others might differ depending on the national culture of a country or any of the other 4 different dimensions of production culture. Therefore, it might be interesting to see how various countries differ in terms of their production culture and how this influences the motivations of consumers for going to the cinema theatres.

Another point of interest for future studies lies in the COVID-19 crisis: considering the long-time implications of the crisis on the cinema industry as a whole. Indeed, this research while not focusing on the crisis has already highlighted the fact that not only were all matters of production, film sets and distribution through traditional cinema theatres and film festivals entirely stopped on a global scale due to the virus, but the VOD industry, on the other hand, has highly benefited from the quarantine situation. Interviewees revealed that by staying at home they have been consuming more movies than usual and have reported noticing an improvement of the quality of movies provided on their favourite VOD platforms. In other words, while the traditional cinema industry came to a stop during the Corona virus crisis, the VOD industry was boosted forward. It may be compelling to study how the results from this pre-COVID-19 research might be altered post-COVID-19 and how the traditional cinema industry will recover from the whole situation.

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Appendix A: Consumer interviews

Introduction:

Why do you like/watch movies?

What is cinema to you?

Why is it important?

Do you have your own account on a VOD platform? If so which one? Why this one?

How often do you watch movies in general (irrespective of place/platform)?

How often do you go to the theatres?

How often do you watch movies Netflix or use other VOD platforms?

What is your favourite genre of movies?

Which cinema theatre do you go to most often? Why this one?

How diverse is the range of movies proposed in The Netherlands? How do you like it?

What is a Dutch movie in your opinion? What distinguishes it from other types of movies?

In your opinion what is the Dutch culture?

How is the Dutch culture reflected in Dutch movies?

How often do you watch domestic movies?

What do you think of domestic movies?

What do you think of Hollywood movies?

Transforming production culture:

Do you watch TV?

Do you download movies?

How often do you see a movie in special conditions such as Imax, 3D, 4D, Screen X, etc?

How has your relationship with movies evolved in your life?

How has Netflix or other VOD platforms change the way you consume movies?

What do you think of the rating system in the Netherlands?

What hold does the Dutch government have on the cinema industry in your opinion?

Motivations for consuming movies:

How important are famous names attached to the production of the movie in your decision making?

How do you pick a movie in the theatres?

How do you choose a movie on a VOD platform?

How is this process different from choosing a movie in the theatres?

Why do you go to the theatres? (attraction to technology, being out, service level, quality of viewing conditions, etc)

Why do you still go to the cinema theatres when you have access to all these new means of watching movies?

How do you view the quality, quantity, and relevance of Netflix movies over the ones in the theatres?

How important is it for you to see the Netherlands featured in a movie? How do you feel when it is?

What is it that you like about Dutch movies? (language, references to your own country, habits, culture, etc)

What do you think of the quality of domestic movies? How about their number and accuracy?

What would make you choose a Dutch movie over another one?

Appendix B: Expert interviews

Introduction:

What is your function in the cinema landscape?

Why is cinema important? What does it represent to you?

How would you describe the Dutch audience? What are their expectations and demands?

How does one attract a Dutch audience?

How are movies perceived overall in The Netherlands? Are they an important form of culture, are they mere entertainment, are they seen as educative?

How are Dutch movies appreciated in The Netherlands?

In your opinion, what is the Dutch culture?

How often do you go to the theatres yourself?

What can you tell me shortly about the Dutch cinema industry's history? What is the importance of this heritage in modern days Dutch cinema? How are history and culture reflected in movies?

How is the Dutch culture incorporated in domestic movies? What elements of the Dutch culture that you previously mentioned are most often found in movies?

What are elements that stand out in Dutch movies? Is there a Dutch style?

How difficult is it to produce a movie in The Netherlands?

What forms of governmental regulations or policies do moviemakers and producers face in The Netherlands? (Is creativity completely free, can you talk about anything you want in a movie? Are there preferred topics to be eligible for governmental grant support?)

What is the preferred way to finance a movie in The Netherlands? Is there a trend? Would you have a preferred technique yourself?

What does the small number of cinema theatre brands (Pathe and Cineville) mean for the theatrical release of movies in The Netherlands?

What is the most challenging for the Dutch cinema industry?

How important are big names attached to a movie for its chances of both it being produced and it being a success?

How often are the modern technologies added in theatres to enhance the movie experience such as 3D, 4D, Imax, Screen X, etc used?

How do you view the future of movie theatres as the primary window for releasing movies?
Do you think that it might change in the coming future?

Transforming production culture:

What has changed in the way cinema is done in recent years? How has the digitalisation of movies impacted the movie productions, distribution and consumption?

What is the impact of Netflix on the cinema industry as a whole? On the cinema theatre industry?

How has the rise of popularity of VOD platforms influenced the content of movies itself?

How has the audience changed in light of technologies such as illegal downloading, movies on tv and more recently VOD platforms? How have their demands and expectations evolved?

In your opinion, why should people keep on going to the cinema theatres?

In your opinion, will people keep on going to the cinema theatres?

What do you think about the modern technologies that have been added in theatres in recent years such as 3D, 4D, Imax, Screen X, etc?

How do Hollywood movies impact the way domestic movies are made and received in The Netherlands?

How do domestic movies attempt to demark themselves from Hollywood movies?

How can Dutch cinema survive the influence of both VOD platforms and Hollywood?

How have the technological changes influenced the production of movies in The Netherlands?

In your opinion, how do technological innovations influence the way Dutch movies stand out?