

This is what plays at Videoland

RTL Netherlands' marketing strategy in a changing media industry

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ABSTRACT

With Netflix entering the Dutch market and the increasing popularity of VOD services, RTL Netherlands had to adjust its strategy to stay relevant in the changing media industry. By acquiring the rights to a fairly new streaming service called Videoland, RTL Netherlands was able to develop its digital activities in such a way that within a few years it became the largest Dutch VOD service and the second-largest streaming service in the Netherlands behind Netflix. Achieving this position for Videoland was accompanied by the application of many strategic changes from RTL Netherlands, which ultimately led to the success of Videoland. This thesis aimed to find out which changes RTL Netherlands has implemented in order to achieve this success in the VOD market. This was done by using the following research question: "Which strategic shifts has RTL Netherlands applied to Videoland to respond to the changing media industry?". To answer this question, a media industry studies approach was applied to publicly available secondary data from sources including press articles, press releases, strategy documents, and trade and popular press interviews regarding Videoland and were analysed by conducting a thematic content analysis. The analysis led to the following themes in the data: VOD-focused, content, binge-watching, consumer-focused, and new talent. The themes revealed the different ways in which Videoland has adapted its marketing strategy over the years. One of the first changes in Videoland its strategy was shifting its focus toward VOD activities. It made several changes to strengthen its position as a VOD service and collaborated with other Dutch media companies to gain an even stronger position to be able to compete with international streaming services. Additionally, Videoland improved its content by adding local stories and creating its own Videoland Originals to strengthen the connection with its viewers and attract new viewers to the platform. While Videoland became more successful, the time spent consuming content by audiences also increased. Videoland reacted to this by including more references to binge-watching in its communication and releasing multiple episodes at once. Finally, Videoland also focused on providing opportunities for new talent in the industry. These changes show that Videoland has adapted its marketing strategy to both the local and global trends that are happening at the moment.

KEYWORDS: *Videoland, VOD, marketing strategy, RTL Netherlands, Dutch media landscape*

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1. Introduction

When Netflix announced its entrance to the Dutch market in 2013 (Van Oerle, 2014), RTL Netherlands knew it had to change its strategy to stay relevant. That is why the biggest Dutch commercial broadcaster bought a relatively unknown streaming service called Videoland (Emerce, 2013). Former CEO Bert Habets called the acquisition the next logical step for RTL Netherlands and embraced the digital transformation they were going through as a company (Eilander, 2013). In the years that followed, the streaming service has developed into the number one Dutch streaming service and the second-largest streaming service in the Netherlands behind Netflix (RTL Group, 2021) securing a strong position in the VOD market.

Similar to Netflix, Videoland entered the media industry as a video rental store in 1984. Because of the changing market and the increasing popularity of VOD services (D'Arma et al., 2021), Videoland went bankrupt in 2010. They had tried to save its brand by starting a VOD service in collaboration with Phillips, however, this service was only available on Phillips televisions and did not catch on as well as Netflix was doing in other places in the world. The service was taken over by The Entertainment Group (Entertainment Business, 2010), who near the end of 2013 started working together with RTL Netherlands to develop the streaming service, with the qualities RTL Netherlands had in the field of media and creating content. RTL Netherlands eventually expanded its stake in Videoland and acquired 100% of the shares later that year (RTL Nederland, 2015). It went on to improve the service in the years that followed and given that video-on-demand services had become more popular, other broadcasters started adjusting to this change as well. In order to stay relevant traditional TV channels had to respond to this change in the media landscape. The launch of several VOD services in Europe led to 140 million subscribers to these streaming platforms in 2020 (European Audiovisual Observatory, 2021) and public broadcasters, as well as commercial broadcasters, responded to this change by partly moving to online distribution of their content (Donders, 2019). The Dutch media landscape had expanded with the entrance of multiple local VOD services including streaming platforms by public and commercial broadcasters such as NLZIET and NPO Plus, as well as the cinema chains Pathé and CineMember that offered their films through streaming services (VPRO Gids, 2020). Besides having to deal with local competitors, the international VOD market was also growing. Streaming services such as Netflix, Disney+, and Amazon Prime started to gain more popularity in the Netherlands and had a bigger market share than the local Dutch alternatives (Telecompaper, 2021). In order for Videoland to distance itself from its local competition and compete with transnational streaming services, RTL Netherlands had to adapt the strategy of the streaming service in a way so that it could keep up with its competitors (RTL Nederland, 2018).

This thesis aimed to find out how RTL Netherlands responded to the changes in the Dutch media landscape due to the increasing popularity of VOD, by applying strategy changes for Videoland. This was done by using the following research question: "Which strategic shifts has RTL Netherlands applied to Videoland to respond to the changing media industry?". This question was answered by applying a media industry studies approach (Herbert et al., 2020) to publicly available secondary data from sources including press articles, press releases, strategy documents, and trade and popular press interviews regarding Videoland and its marketing strategy. The data were analysed by conducting a thematic content analysis.

1.1 Societal and academic relevance

This research will create a better understanding of how the choices that VOD services make in terms of marketing and strategy can impact the media industry and have an influence on the choices of consumers. With over one million subscribers in the Netherlands (RTL Group, 2021), Videoland reaches a big part of the Dutch population, also considering these streaming accounts are often used by more than one person (CordCutting, 2021). This shows how many people they reach and potentially can influence with their marketing strategies.

As a successful Dutch VOD service, Videoland offers the opportunity to research the impact of VOD services on traditional television and the media landscape in the Netherlands. Prior research mostly looked at the impact of global streaming services on traditional television and the media landscape. However, specific studies on Videoland and the Dutch market are still missing, which has led to a gap in academic literature.

For that reason, this research has looked further into the changes in the media industry, with a focus on Videoland and the Dutch market. Previous studies looked at certain concepts that were relevant for the development of other streaming services. For example, a study by Burroughs (2018) has shown that streaming service Netflix uses 'streaming lore' to grow its service, which makes it interesting to see if Videoland uses a similar or even an equal approach. As well as the concept 'Netflix effect' explained by Matrix (2014) which has created an entirely different experience for audiences when watching a TV show.

1.2 Chapter outline

This thesis is divided into five chapters, which will be briefly discussed in this section. The first chapter is used to introduce the topic of the study and give more background to the research question. Chapter two is the theoretical framework in which relevant theories and concepts regarding the topic of this thesis are discussed. The chapter consists of the subsections TV industry changes, VOD market, Dutch media landscape, and digital marketing. The theory highlights the recent changes in the media industry, the Dutch and international VOD market and trends in

marketing. Chapter three is the methods section which explains the methodological decisions that were made in this research. It discusses the research design that was used to answer the research question, how the data was collected, and how the data was analysed. Chapter four is the results section which presents the results that are based on the research that was done. The results are discussed in relation to the concepts of the theoretical framework and are divided into five sections. Each of these sections is a theme that emerged from the data, which are VOD-focused, content, binge-watching, consumer-focused, and new talent. Chapter 5 is the final chapter of this thesis in which the research question is answered. In addition, this chapter also offers a better understanding of the results of the study as well as the limitations and ideas for future research.

2. Theoretical framework

This chapter discusses existing literature related to the position of RTL Netherlands and Videoland in the (Dutch) media landscape and the changing media industry. The research question focuses on how RTL Netherlands has applied strategic shifts to keep up with the changes in the media industry, which is why this section will cover research on TV industry changes, the VOD market, the Dutch media landscape, and digital marketing. The first subsection discusses the developments that have been happening in the TV industry and how this has influenced traditional TV channels and relevant media companies. In the second subsection, the VOD market is analyzed. Besides looking at the players in this market, it also looks at relevant concepts that are important to discuss in order to answer the research question. The third subsection describes the Dutch media landscape by looking at the history and the most important players. The final subsection covers concepts and theories regarding digital marketing. This information is needed to be able to recognize and understand the changing strategies of RTL Netherlands and Videoland better.

2.1 TV industry changes

With the VOD market significantly growing in the past years (Kim, 2021), national television industries worldwide have been impacted. Transnational as well as national streaming platforms have entered the market and their arrival has had a major impact on the media landscape. Although VOD services differ from traditional TV, they are seen as a serious opponent as they are a popular alternative option for consuming content (D'Arma et al., 2021). While some argue that VOD services and digitalization may create an end to traditional TV (Mills, 2017; VPRO, n.d.), others suggest that the way people watch TV simply has changed. In the Netherlands for example, the screen time had increased, while the time spent watching TV went down (Stichting Kijkonderzoek, 2021) and people started watching more television 'delayed'. Delayed watching is when people record the programmes they are interested in and watch them back later when they have time. Additionally, more people have started watching content on VOD services compared to before (Brandenburg – van de Ven, 2020). Which is why it cannot be denied that the introduction of streaming services has affected the viewing behaviour of global audiences, as can also be seen in the decrease of Americans that are subscribed to traditional cable and satellite service (Lotz, 2019; Wayne, 2018).

The changes in the media industry are mostly due to the digitalization of certain processes. Examples of Videoland, as well as Netflix changing into a VOD service after digitalizing their video rental services, show perfectly how digitalization has influenced the media industry (Entertainment Business, 2016; Lobato, 2019) Digitalization has led to consumers being more in control of when, where, and what they watch, as well as being able to be in contact with the people making the content (Gerbarg, 2009).

Aside from the influence of VOD services and digitalization, media companies have become more focused on customers and personalization. Due to technological innovations, it has become easier to collect data from online users and find out what is needed to meet a customer's personal needs. In addition, it has become more common for media companies to adjust its offer depending on the customer. By giving personal recommendations, as is for example done by streaming services, media companies hope to strengthen their relationship with the customer (Aguirre et al., 2016).

2.2 VOD market

The VOD market has grown due to the consequences of digitalization as described in the previous section and because of the response by television channels and companies. The decrease in time spent watching tv by people worldwide caused them to experience negative consequences. In order to reach a new audience and keep having a platform where they could share their content, multiple tv channels partially switched to online distribution. They did this by creating a platform on which they could stream their existing content (Donders, 2019). This way the costs of having a VOD service besides their regular channels did not require too much effort and money. In addition, multiple commercial broadcasters also started new platforms to be able to stream their content. This was done in the United Kingdom by the channel ITV, which created the streaming service ITV HUB (Johnson, 2017), and in Flanders by Telenet who launched the VOD service Streamz as a response to the success of Netflix in Belgium (Dumon, 2020).

Not only did tv channels start to react to the changes in the media industry. Streaming services also started to improve their services by applying their knowledge of the industry to their platforms. Burroughs (2018) describes this as industry lore and distinguishes three different categories when it comes to industry lore for the streaming platform Netflix. These categories are Netflix as quality streams, the algorithmic audience, and cord-cutters and cord-nevers. The category Netflix as quality streams describes how Netflix is "mutually disrupting/reaffirming traditional media industry logics and best practices through the introduction of its own original streaming content" (Burroughs, 2018, p.6). By creating its own TV shows and films, Netflix has distanced itself from its competitors, since they offer original content. The way content is created for network television in comparison to streaming services, also differs according to Burroughs (2018). Content for network television is written with the thought of keeping the audience its attention, while content for streaming services can be very detailed and provides room to explore characters and their characteristics.

The second category, the algorithmic audience, looks at the successful algorithm Netflix has built. This algorithm is content-based, which means that it only makes recommendations based on the content you have watched. This algorithm and its recommendation system are what according to Netflix makes them different from other streaming services. The last category is cord-cutters and

cord-nevers. Both of these groups consist of consumers that are very involved with streaming services. The one group, cord-cutters, have used network television but have switched to streaming services. The other group, cord-nevers, have never used network television and just use streaming services. While network television companies are losing subscribers, streaming companies are experiencing growth and popularity by responding to the needs of these groups (Burroughs, 2018).

Most of the consumers mentioned in the previous section might be familiar with the Netflix effect. According to Matrix (2014), the introduction of streaming services has changed the way TV shows and films are distributed. This also has had an impact on what, how, and when the audience consumes content. It has led to viewers watching more television, while also for a longer period of time. This is mainly due to the availability of content on streaming services. Netflix releases the entire season of a series at once, resulting in subscribers watching “back-to-back episodes, devouring a season of content in just days” (Matrix, 2014, p. 119), which Matrix describes as the Netflix effect.

2.3 Dutch media landscape

When looking at the Dutch media landscape, this section will focus on two different elements that are important for this research. One of them is the Dutch TV industry, which will be discussed first. Videoland its parent company, RTL Netherlands, is the biggest commercial broadcaster in the Netherlands with a market share of 24,6%. Its biggest competition is the public service broadcaster NPO, with a market share of 35,6% (Stichting Kijkonderzoek, 2021). However, RTL Netherlands announced its merger with Talpa Network in June 2021 (RTL Group, 2021), which will lead to a market share of 40% when the deal goes through (Rogmans, 2021). The merger between the two media companies means a more powerful position for RTL Netherlands since it will have the biggest share in the Dutch TV market and will have access to new formats of Talpa Network its production company (RTL Group, 2021).

Another element in the Dutch media landscape is VOD services. The Dutch VOD market consists of transnational as well as local streaming services, although transnational streaming services have a bigger market share (European Audiovisual Observatory, 2021). The VOD market in the Netherlands started to become interesting when Netflix announced its entry in 2013 (Van Oerle, 2014). Before its announcement, RTL XL was one of the few streaming services in the Dutch market and mainly focused on streaming content from RTL Netherlands its TV channels. When Videoland became aware of Netflix's plans, it decided to buy shares in a relatively unknown streaming service called Videoland, to be able to really participate in the VOD market (Emerce, 2013).

Almost ten years later, the VOD market has developed into an industry full of international and local players. VOD services like Netflix, Disney+, and Amazon Prime Video are the most popular international streaming services in the Dutch market. Netflix is by far the biggest VOD service in the

market with a market share of 42%. Videoland on the other hand only has a market share of 15% but is the second biggest streaming service behind Netflix and the biggest Dutch streaming service (Telecompaper, 2021). Besides Videoland, there are multiple other local VOD services in the Netherlands, such as Pathé Thuis, NLZIET, NPO Plus, Ziggo Movies & Series, and CineMember (VPRO Gids, 2020). However, none of these services are in direct competition with one another, since all of them have different characteristics (Lobato & Lotz, 2021). For Videoland to stand out from these services, they have to offer something distinctive to its potential subscribers. This could something similar to what Netflix has done in the past, by creating its own content for its service or offering its subscribers very specific recommendations with the help of its algorithm (Burroughs, 2018).

2.4 Digital marketing

Marketing brings consumers and brands closer together, therefore implementing the right marketing strategy is of great importance. With the rise of the internet, traditional marketing has faded into the background and has been replaced by digital marketing. Where traditional marketing does not result in any interaction with the audience and is a time-consuming process, digital marketing solves these problems (Yasmin et al., 2015). It allows marketers to deliver personalized and real-time content and services to individual consumers and it influences them in an attractive and subtle way (Holliman & Rowley, 2014).

Netflix also implements this personalised experience in their strategy. One of the ways they have used it was as a part of the marketing campaign for House of Cards, where different user profiles got to see different trailers for the TV show. Another form of personalisation in their marketing strategy is the way they position themselves in different markets worldwide. By using its original content, Netflix can adapt their content library per region to gain a stronger position in the market. They also increased their focus on diversity in their content, due to their transnational reach (Jenner, 2018).

Besides personalisation in marketing, Jenner (2018) mentions how Netflix has been trying to emphasise the quality of its content and the link to binge-watching. Burroughs (2018) states that content for streaming services can be considered of higher quality since there is more room for detail and exploring the characters. Netflix uses this in their marketing campaign for the TV show House of Cards when they repeatedly highlight the link between quality television and binge-watching (Jenner, 2018). By releasing seasons all at once multiple times, they changed how audiences consume content (Matrix, 2014) and created the idea that binge-watching was the new normal when consuming quality content (Jenner, 2018).

3. Methods

This section describes the methodological choices that were made in the research design for this thesis. The aim of this research is to gain more knowledge on how Videoland adapted its marketing strategy over the years, to keep up with the changing media landscape. The research was done by using a media industry studies approach. This means that the study conducted a variety of sources, which provide “a rich understanding of issues like ownership patterns, business strategies, government-industry relations, and labor practices” (Perren, 2015, p. 227). The following sections will further explain the design of this research and how the data was collected and analysed in order to answer the research question.

3.1 Research design

This thesis uses a qualitative approach to study the marketing changes applied by RTL Netherlands to respond to the changing media industry. When using a qualitative approach, themes can easily be recognized in the data and it allows “to discover underlying meanings and patterns” (Babbie, 2017, p. 391). Furthermore, applying a qualitative approach ensures a more in-depth and detailed analysis, which will give a better understanding of the meaning of words, concepts, and ideas (Brennen, 2017). Unlike quantitative research methods, a qualitative approach allows the researcher to find the deeper meaning behind the data that was collected and focuses on finding the concepts and words that might help with answering the research question. This method is fitting for this thesis since the topic that is researched, requires looking at a large volume of texts to discover patterns and structures that reveal any kind of changes in strategy.

To answer the research question, this research employed a media industry studies perspective which focuses on “how individuals, institutions, and industries produce and circulate cultural forms in historically and geographically contextualized ways” (Herbert et al., 2020, p.7). This was done by conducting a qualitative content analysis. This method allows the researcher to look at different types of materials and discover patterns in the concepts and ideas in these materials. The material consisted of secondary data regarding RTL Netherlands and its VOD service Videoland. A detailed description of these data is given in the next section. Given the flexibility of this method, it allows the researcher to adjust the analysis to fit the data of the research in order to get the best results possible. However, this does not mean that there should not be a clear structure or guideline in how the analysis is conducted. In addition, the iterative process of this method also helps improve and revise the themes in order to create structured themes that will help answer the research question (Braun & Clarke, 2006).

3.2 Data collection and sample

This research examined a variety of publicly available secondary data from sources including press articles, press releases, strategy documents, and trade and popular press interviews regarding RTL Netherlands' strategy towards VOD and Videoland. Press articles included articles published by Dutch newspapers, including *Algemeen Dagblad* and *Nu.nl*, and news forums specialized in certain topics which included *Adformatie*, *Business Insider Nederland*, *Emerce*, and *Villamedia*. Trade and popular press interviews selected for this research, were with either the CEO of RTL Netherlands Sven Sauvé, former CEO Bert Habets, director content and marketing Peter van der Vorst or the CMO of RTL Netherlands Lucien Brouwer. The sample consisted of 52 articles and documents that were over 300 words and were published between January 2013 – the year that RTL Netherlands acquired the rights to Videoland – and May 2022. This period roughly marks the ten years in which Videoland developed from an upcoming VOD service to the biggest Dutch VOD service, which is a good amount of time to measure any changes in RTL Netherlands its strategy. This research analysed a single organisation in a specific industrial context, similar to the approach that was used in studies that were done by Matrix (2014), Kim (2021), and Wayne and Uribe Sandoval (2021).

The data was collected through purposive sampling since this allowed the researcher to select a sample that was most fitting for the purpose of the research. In order to compose a clear sample, criteria were drawn up to ensure only relevant materials were selected. The first criterium was that the data had to be published between January 1st 2013 and May 1st 2022. Any data before or after this time frame was not used in this research, to establish a clear period in which the changes for Videoland took place. The second criterium was the use of certain words when looking for data. On the press releases page of RTL Netherlands, the filter option was used to only select press releases that contain the word "Videoland". This ensured that all press releases had a connection to Videoland since RTL Netherlands also updated the press on other elements of its company. The same strategy was used when looking for strategy documents on RTL Netherlands its website and when looking for press articles and trade and popular press interviews. Additionally, when looking for press articles and trade and popular press interviews, the names of people from RTL Netherlands its management were used to find more results. The final criterium was to check the data for connections to marketing and strategy. Data that was not tied to either of those, were not selected in the sample. The gathered data consisted of publicly available texts, which therefore will cause no harm or will not violate anyone's privacy. The data was downloaded and stored in a separate folder, to prevent the data from getting lost or being unavailable.

3.3 Data analysis

The gathered data was analysed by doing thematic content analysis. This was the most fitting type of analysis for this research since it allowed the researcher to look at different types of texts. By using thematic content analysis, concepts and key patterns could be discovered in the data, which covered the most important elements. These elements could be sorted into themes and helped answer the research question (Braun & Clark, 2006).

To help discover new and existing themes within the data, both a deductive and inductive approach were used. With a deductive approach, the most important takeaways from the theoretical framework, called sensitizing topics, function as guidelines on what to look for in the data. An inductive approach leaves more room to look for new insights from the data. The sensitizing topics that were used in the deductive approach were the following: Personalization, binge-watching, quality streams, and digitalization. Personalization looks at the amount of effort RTL Netherlands puts into creating a personalized experience for its viewers. This could for example be done by creating personalized content or by trying to improve its connection with the viewer. Binge-watching refers to whether Videoland uses references to binge-watching in its communication and stimulates the idea of binge-watching. Quality streams focuses on the content RTL Netherlands and Videoland produce for its viewers. The idea of quality streams is that the content is created especially created for VOD by the streaming service itself, considering that content for streaming services is different from content created for traditional television. The last sensitizing topic, digitalization, looks at how RTL Netherlands has applied digitalization in its strategy and processes.

The coding process in this research consisted of two rounds of coding, which included a round of open coding and a round of focused coding. The first round of coding was used to build the initial coding frame that would help with coding the rest of the data. This round of open coding only analysed a small part of the data. This frame was then used in the second round of coding, which was done by using a focused coding process. This round of coding led to the final coding frame, which was then used for concluding the results of the research.

The collected data was uploaded to the qualitative data analysis software programme Atlas.ti, to help with coding the big volume of data. The first round of coding analysed eleven out of the 52 articles, to serve as the base for the initial coding frame. The open coding phase resulted in nine different themes and 44 codes. The themes that were found during the open coding process were Dutch productions and content, new talent and creators, subscriber-focused, collaborations with other media companies, exclusive content, growth of Videoland, binge-watching on Videoland, creating own content, and keeping library updated. The remaining 41 articles were then analysed by using the initial coding frame. This analysis led to the creation of the final coding frame, which

consisted of five themes and twenty codes (appendix A). The themes from the initial coding frame were merged into the following themes: VOD-focused, content, binge-watching, consumer-focused, and new talent.

4. Results

This chapter presents the results of the qualitative content analysis, which are addressed in relation to concepts from the theoretical framework. This chapter is divided into five sections, each explaining one of the themes found in the data and its subcategories. The themes display the strategy changes that RTL Netherlands applied in the past ten years to strengthen Videoland its position in the VOD market, which are: VOD-focused, content, binge-watching, consumer-focused, and new talent.

4.1 VOD-focused

One of the first important and defining changes that RTL Netherlands made in the field of VOD, is shifting its focus. While RTL Netherlands was initially mainly engaged in broadcasting traditional television, the changes in the media landscape made it realize that paying more attention to the VOD market would be smart. The following section shows the effort that RTL Netherlands has put into improving and growing Videoland as a VOD service.

Videoland started out as a video rental store in 1984 and did this until its bankruptcy in 2010. Before Videoland went bankrupt, it expanded its services by co-creating a VOD service especially for Phillips televisions. While the Videoland stores all got closed, the VOD service was taken over by The Entertainment Group (TEG) (Entertainment Business, 2010). The VOD service was very limited and could be seen as a digital version of its video store as viewers still paid per film. With the VOD market growing and the entrance of Netflix in the Netherlands approaching in September 2013 (Van Oerle, 2014), RTL Netherlands acquired 65% of the shares of TEG in August 2013. According to the managing director of RTL Digital, Arno Otto, it was a necessary step in their strategy with regard to VOD (RTL Nederland, 2015). The former CEO of RTL Netherlands, Bert Habets, said the “acquisition is a logical next step for us in the development of our on-demand TV offer. We are in a digital transformation with RTL” (Eilander, 2013, para. 2). These statements show that RTL Netherlands is entering a new market with the acquisition of Videoland and thus shifting its focus. With big international players such as Netflix entering the Dutch media landscape, RTL Netherlands its only option was to go along with the changes. In another interview, Habets responded to this change in the market by calling the acquisition “the first major step in 2013 to respond to the growing consumer need for self-direction in the television domain” (RTL Nederland, 2014, para. 2). The increasing demand to be able to decide what to watch and when to watch something, eventually led to RTL Netherlands expanding its stake in Videoland from 65% to 100% later that year (RTL Nederland, 2015). By expanding its stake, RTL Netherlands showed it was serious about developing its on-demand TV offer.

With RTL Netherlands now completely controlling Videoland, they were able to further expand its focus and vision. To ensure its new approach would not fall through, RTL Netherlands applied more strategy changes. Its focus on Videoland and the VOD industry also required specialists in that area. That is why in 2017 both Sven Sauvé and Lucien Brouwer were added to the management team of RTL Netherlands as CEO and CMO. Both Sauvé and Brouwer had experience working on digital platforms in their previous positions (RTL Nederland, 2017; RTL Nederland, 2017). RTL Netherlands said that with these additions to team they were intending to “adapt its organization so that it is more agile and better able to gather insights and translate them into new productions.” (RTL Nederland, 2018). Adding more experienced people to the management team, gave RTL Netherlands a better understanding of the VOD market and allowed them to execute their strategy better. By doing this Videoland was able to take stronger position in the market. Since the VOD industry also required a different type of content, Peter van der Vorst was added to the management team as director Content and Marketing a few years later. His experience in the industry and his inspiring vision on the development of the media landscape were according to Sauvé what made him perfect for the job (RTL Nederland, 2019).

Another strategic step that followed was the merger of all of RTL Netherlands its OTT activities. This step is part of a bigger strategy called the *Fan Centric-strategy* that is aimed at consumer wishes, which will be explained in more detail in the section ‘consumer-focused’. With this new strategy, RTL Netherlands let go of its traditional TV channel-oriented approach and started focusing on interacting with its viewers. This strategy consisted of five different points, where the first one focused on the growth of centralized VOD activities. As a result, RTL Netherlands its smaller VOD service RTL XL and Videoland now had become one service where subscribers could see all of RTL Netherlands its content. CEO Sauvé said this about the step: “Videoland is growing faster than ever. We have to, because we don't just want to be the market leader in TV, we also want to be the local number 1 in video on demand” (RTL Nederland, 2018, para. 6). This statement both shows how RTL Netherlands is shifting its focus towards VOD and how its strategy is adapting to those changes. By changing important elements of its strategy in favour of its online activities, it is clear that RTL Netherlands is changing its focus to a different and upcoming market. By focussing on what the consumer wants, which in this case is a platform where all RTL Netherlands its content can be seen, it is also strengthening its position as the local number one VOD service.

RTL Netherlands aimed to further develop Videoland and its content by collaborating with other media companies in the Netherlands. In the years following the acquisition of Videoland, RTL Netherlands started working together with other companies in order to strengthen its VOD service. One of the things they did to enhance their content, was by collaborating with ‘De Ontmoeting’, which is a financing project for short film. The films that were produced in this project could be

watched on Videoland after they premiered at the film festival. This collaboration is explained in more detail later in this chapter. Aside from using its own content on the VOD platform, RTL Netherlands reached an agreement with Viacom Benelux to extend the Videoland library with several popular TV series (RTL Nederland, 2016). In addition, they also entered into a content collaboration with VICE to add to the documentaries on its platform (RTL Nederland, 2018). And during the Covid19 pandemic, RTL Netherlands started working together with IDTV and FC Group. Both media companies worked together with RTL Netherlands on shows and formats for Videoland (TV Bizz Magazine, n.d.). Collaborating with other media companies gave RTL Netherlands new content for its subscribers to watch on Videoland while they were still in the beginning phase of the platform. This way Videoland its library was still updated, without having to put much effort into producing new formats and series. The last collaboration that has been important for Videoland was with Talpa TV in 2018. Back then, RTL Netherlands and Talpa TV were seen as competitors. However, André Kreuzen – CFO of Talpa TV – was convinced that the real competition came from the large foreign players. That is why the two companies decided to collaborate and Talpa TV its Dutch series could also be seen at Videoland (Hafkamp, 2018). By collaborating with another major player in the Dutch media industry, Videoland gained a stronger position in the market since Talpa TV its content added a lot of value to Videoland its library. In addition, it also took away the possibility of one its biggest competitors starting its own streaming service at that time. This collaboration left RTL Netherlands and Videoland with several advantages to other competitors and took out one of its main competitors. After some years of working together, the partnership between the two media companies ended when the situation became more complicated. John de Mol - founder and owner of Talpa Network – stopped providing RTL Netherlands with new TV formats in order to make his own channels more successful. While Sauvé was still open to work together, De Mol was sure a collaboration would never take place again.

However, with international competitors gaining more ground in the Dutch media landscape, RTL Netherlands and Talpa Network announced their merger in June 2021. One year later, in June 2022, the merger is still awaiting approval from the ACM (Authority for Consumers and Markets) who is doing in-depth research on the merger because the consequences of it could have a major impact on the Dutch advertising market. De Mol expects to lose their spot in the market to American and Chinese tech giants if they do not merge soon (Hafkamp, 2022). Sauvé also believes that the merger could help them maintain their position in the market, as well as improve the content for their platform. He explains that “by working together with Talpa Network, we can invest in Dutch content and distinguish ourselves in this way. There will be more money to invest, and we will have John de Mol with his wonderful new creative ideas” (Jansen et al., 2021, para. 4). By merging with Talpa Network, RTL Netherlands will become the biggest commercial broadcaster in the Netherlands, and it

will also gain the skills and capacity to create more and bigger productions for Videoland. Videoland will overall gain a stronger position in the Dutch market and has the capacity to compete against larger foreigner players, just like they mentioned they wanted to be able to back in 2018.

In order to keep up with its competitors, Videoland has made multiple changes to its subscription types in the past years. The first shift in strategy was changing its revenue model that was built around the rental of individual films (Van Oerle, 2014) to an 'all-you-can-watch' subscription model (Eilander, 2013). This subscription type called 'Videoland Unlimited' was comparable to Netflix its subscription model and set Videoland apart from all other local VOD services that were still renting out individual films. Videoland even highlighted its advantage over other VOD services by using it in its marketing and communication statements about the new subscription model, as was done by Otto: "This autumn we will launch the first all-you-can-watch subscription in the Netherlands, which gives consumers unlimited access to films, premium series from abroad and the best of Dutch soil for a fixed amount per month" (Eilander, 2013, para. 3). This new subscription type shows that Videoland is ahead of its competitors, by offering its viewers the option to watch as much content as they would like. In addition, Videoland does not only offer its subscribers content that can be seen on RTL Netherlands its television channels, the platform also has other options available from its collaboration with other media companies. By giving subscribers extra content on this platform, Videoland becomes more attractive for potential subscribers.

Three years after the acquisition of Videoland by RTL Netherlands, Videoland decided to adjust its subscription fee from €9.95 to €8.99 (RTL Nederland, 2016). Unlike Netflix, who had increased its subscription fee by a few euros earlier that year. Sauvé explains the decrease in the following statement:

We do not only invest in our product, but also in the consumer. We offer even more value for money with the new price of €8.99. This is the ideal price point for now, with which we are accessible to a wide audience. (Entertainment Business, 2016, para. 9)

By adjusting the price to €8.99, Videoland wants to become accessible to a wider audience. With a lower price, it is more attractive to join Videoland, especially when one of its competitors who is already more expensive, raised their prices. Videoland continued to make its subscription more attractive to potential subscribers when they introduced three new subscription types in 2020. With the new subscription types basic, plus, and premium, Videoland promised the viewer more freedom of choice, while keeping the same range of series, films, and documentaries (RTL Nederland, 2016). The difference in the subscriptions can be found in "the presence of advertisements, the number of screens on which Videoland can be viewed simultaneously and access to the Download to Go function" (RTL Nederland, 2020, para. 1). Brouwer said Videoland is "hoping to attract new customers, while rewarding the loyalty of our current base" (TV Key Facts, n.d., para. 6) with the

introduction of the new tiers. Videoland increases the chance that new subscribers will join with these new tiers and prices, since there is something to choose from for everyone. It gives subscribers more freedom of choice and it does not restrict anyone because of their budget.

Partly due to the changes made to its subscription, Videoland has experienced significant growth in subscribers in recent years. Content director Peter van der Vorst talks about Videoland its success in the following statement: "Videoland grew immensely –beyond one million paying subscribers. The viewing time was nearly doubled in one year. We are now the number one local service and the number two in the Netherlands right after Netflix" (TV Bizz Magazine, n.d., para. 10). RTL Netherlands and Videoland had the ambition to stay ahead of the other VOD services in the Netherlands and expand their platform to stay in the race with international streaming services like Netflix (RTL Nederland, 2017). Sauvé said in an interview in June 2021, that they were "leaving all the local players and even some American parties behind and biting Netflix's ankles" (Emerce, 2021, para. 1). However, Sauvé was convinced that they have to keep investing in unique and local content to secure its position as "the only Dutch alternative to Netflix" (Business Insider Nederland, 2018, para. 7). Besides Netflix, other competitors such as Viaplay and HBO also posed a threat to Videoland. That is why the collaboration with Talpa Network had to ensure that Videoland gained a stronger position in the Dutch VOD market (Hafkamp, 2018). Instead of competing with each other, RTL Netherlands and Talpa Network decided to collaborate, to be able to compete with the big American tech companies (Jansen et al., 2021). Moreover, Videoland did not have the ambition to become the number one VOD service in the Netherlands. According to Sauvé, a number one position was not realistic and they were very satisfied with a relevant second place. To maintain this spot, Videoland focused on producing and offering its own exclusive content (Entertainment Business, 2016). The growth in subscribers, the increased viewing time, and its secure position in the Dutch market all display how RTL Netherlands has built a strong brand for Videoland in the past years. This shows that RTL Netherlands its decisions to focus on its online activities and take over Videoland were quite successful. Shifting the focus in its strategy eventually led to a successful Dutch platform that is competing with big international names.

4.2 Content

The second thing RTL Netherlands focused on in Videoland its strategy was improving its content. When Videoland entered the Dutch VOD market, an important part of its strategy was having an updated library. This can be seen when looking at the large number of international series that were added to the platform in the first few years (RTL Nederland, 2016). At the start of Videoland as a VOD service, its library mostly consisted of content that was originally created for RTL Netherlands. However, to keep up with other streaming services in the market, it was important for Videoland to

keep its library updated and add different types of content to the platform to keep it interesting enough to be subscribed. By collaborating with other media companies as was mentioned in the previous section, Videoland was able to add successful international series to its library. In addition, Videoland also acquired the exclusive VOD rights to several other international series (RTL Nederland, 2018). This way Videoland expanded its library without having the costs of producing its own TV series or formats.

Aside from adding a lot of different series and films, Videoland also updated its library by frequently adding new episodes and seasons. Whenever an international hit series was uploaded to the platform, new episodes were added daily or weekly in order to provide enough content for its subscribers. This can for example be seen when the TV series *The Hills* was uploaded to Videoland. In the press release announcing the series' addition to the platform, RTL Netherlands said "a new season of the popular reality series is going to be added every week" (RTL Nederland, 2016, para. 2). By keeping the library updated, subscribers stayed engaged with the platform since there was always something new to watch.

Aside from adding international series to its library, Videoland planned to release more Dutch productions on its platform since this type of production was popular among its subscribers. In 2021 Videoland also announced it was planning to produce and invest in more drama series, which was explained by Van der Vorst in the following statement: "Dutch drama is one of the driving forces behind the growth of Videoland, which is why we will be investing considerably more in new and original productions in the coming years" (RTL Nederland, 2021, para. 2). The statement also explains that RTL Netherlands wants to invest more in original productions, besides regular Dutch productions by other media companies. This change in content comes from listening to the needs of subscribers, which is how Videoland found out what kind of content they were interested in. In 2016 Videoland announced it was working on new productions for the platform. However, Videoland was not sharing details and the international titles on the platform were still being promoted (RTL Nederland, 2016). This indicates that Videoland was not planning on letting go of the international series on its platform in the near future. It was a couple of years later when Videoland released a lot of its own productions, which were called Videoland Originals. Videoland applied a very similar approach to Netflix, who had also been creating its own content for some time now. This approach which is referred to as quality streams (Burroughs, 2018) shows how Videoland is distancing itself from its competitors by creating original streaming content. Brouwer said this was necessary since they found out that content is sometimes not interchangeable between their TV channels and their streaming platform (CMOTalk, n.d.). Content for network television is often created differently compared to content for streaming services (Burroughs, 2018). In recent years RTL Netherlands had learned that for example making drama for VOD is different than for its TV channels. The CMO his experience with

creating series for VOD was that it often needed fewer repetitions, there was more time to get to know the characters of a show, and cliff-hangers were used less (CMOTalk, n.d.). That is why Videoland introduced its own original content which would fit the streaming service better. It also led to new and innovative series for the platform that could not be seen anywhere else.

As was mentioned in previous paragraph, Videoland wanted to invest more in Dutch drama productions. Together with the creation of other genres of Videoland Originals such as documentaries and reality shows (TV Bizz Magazine, n.d.), Van der Vorst said “the drama department was fully in production with new drama for Videoland” (RTL Nederland, 2020, para. 19). The investment in these productions turned out to be a smart move for Videoland. TV series such as *Judas*, *Random Shit*, and *Mocro Maffia* became very successful (RTL Nederland, 2019). Especially *Mocro Maffia* seemed to be very popular amongst the subscribers of Videoland, as its third season started with a record number of viewers (RTL Nederland, 2021), won an award for best drama series, and was nominated for another Dutch television award (RTL Nederland, 2021). Sauvé said that “the enormous growth that Videoland is experiencing is clear proof that we are making the right choices” (RTL Nederland, 2018, para 2).

Videoland its ambition to stay ahead of other VOD services and invest in local stories to do so could be seen when looking at the increase in local content. Sauvé claims that Videoland its success is “due to the retention of the strategy and investments in local content” (Hafkamp, 2021, para. 3). Videoland its focus on local content can be seen when looking at its pay-off ‘*what happens in the Netherlands, plays at Videoland*’ [wat speelt in Nederland, speelt bij Videoland] (RTL Nederland, 2019) which indicates that at Videoland they know what is happening in Dutch society. Van der Vorst confirmed this by saying the following: “We have known for 30 years what is going on in Dutch society. We distinguish ourselves with local stories. Not only on TV but also at Videoland” (RTL Nederland, 2019, para. 1). In another statement, Van der Vorst explains that local content is important for their platform because Videoland is “100% focused on the Dutch viewer” (RTL Nederland, 2018, para. 3). They are also convinced that the impact of local content is greater than that of international TV series (Entertainment Business, 2016). With this in mind, the earlier mentioned Fan Centric strategy was introduced, in which local content had to predominate (Hafkamp, 2018). This caused Videoland to create more programs that reflected the interests of the Dutch audience and followed the latest local trends, so the content would be relatable and relevant to its viewers (TV Bizz Magazine, n.d.; TV Key Facts, n.d.). Sauvé adds to this by saying the following: “We are very strong in creating content that the whole of the Netherlands can identify with. And that's exactly what sets us apart from those big international streaming services” (Emerce, 2021, para. 3). This statement showed that Videoland is very confident about its position in the Dutch VOD market. Sauvé emphasized this in another interview, in which he compared Videoland to Netflix: “We

must continue to invest in unique local and international series to ensure our position as the only Dutch alternative to Netflix" (Business Insider Nederland, 2018, para. 7). Sauvé once again shows that he is convinced that Videoland is the best VOD service in the Netherlands because they invest in local content. Additionally, Videoland called itself "the number one VOD platform when it comes to local series and films" (RTL Nederland, 2016, para. 3), which illustrates how committed they are to creating local content. And since local content is important to the viewers of Videoland and is one of the features with which Videoland can distinguish itself from its competitors, it is very important to implement this in its strategy.

Besides local content, exclusive content is also popular among Videoland viewers. Videoland has responded to this in various ways in recent years. They did this by launching series exclusively on its platform or by making the series available on Videoland before its premiere on TV. The first Videoland Original that could exclusively be watched on Videoland was the TV series *De ZWARTE TULP* and was also the first Dutch TV series created for VOD (RTL Nederland, 2016). Another example of this is when the new season of the TV series *Familie Kruys* could be seen on Videoland two months before it premiered on TV (RTL Nederland, 2017). The exclusivity of the series on Videoland makes it more interesting to be subscribed to the service, since subscribers can be the first one who watch it and the series cannot be seen anywhere else. Videoland also often emphasized the exclusivity of its series when releasing a new season or when advertising in general, as was done for *Mocro Maffia*: "Mocro Mafia can only be seen at Videoland from October 11th" (RTL Nederland, 2018), and for international TV series like *The Young Pope*: "The new international drama series 'The Young Pope', the eye-catcher at the '73rd Venice International Film Festival' this weekend, can be seen exclusively at Videoland from the beginning of November in the Netherlands" (RTL Nederland, 2016, para. 1). By using exclusive content as a unique selling point of the service, new customers are attracted that are interested in these exclusive series. Another way Videoland has brought exclusive content to its fans, was by creating special seasons of popular TV shows. For example, the TV shows *Temptation Island* and *Expeditie Robinson* both got their own Videoland version. Brouwer explains the choice for an exclusive season of *Temptation Island* in the following statement:

Videoland is 100% aimed at the Dutch viewer. We prove that it works with 'Temptation Island'. The program is not only a great success on television but in the meantime also big online and on social. That is why we will be bringing an extra and absolutely sensational season of 'Temptation Island' for our subscribers, which can only be seen at Videoland from June. (RTL Nederland, 2018, para. 3)

The decision to create a special season of the program for Videoland shows that besides its focus on its customers, RTL Netherlands wants to use a successful TV show to attract more people to its VOD

platform. Fans of the show will most likely subscribe to Videoland to be able to see this exclusive season, which will lead to more subscribers.

4.3 Binge-watching

Another element that Videoland started taking into account was binge-watching. Over the years, Videoland has responded and taken advantage of the effect caused by Netflix. Videoland did this by releasing multiple episodes at once and referencing to binge-watching in its marketing and communication statements. Due to consumers watching more content and also for a longer period of time, Videoland started updating its library accordingly. Instead of releasing episodes week by week, Videoland started adding entire seasons of TV shows to its library at once. This was done when adding international hit series to the platform, but also when releasing its own productions. This for example happened when the new season of the Videoland production *Mocro Maffia* was released. It was announced by saying that the series “can be seen in its entirety from October 11 only at Videoland and contained 8 episodes of 45 minutes” (RTL Nederland, 2018, para. 5). The show was marketed to the public with the message it could be watched in one go, which stimulated the idea of binge-watching and showed that the Netflix effect had also influenced Videoland its marketing style. This approach eventually led to an outcome similar to that of Netflix. Videoland subscribers overall watched more content than before and also for a longer period of time. By adjusting the way Videoland released its series on the platform, the way subscribers consumed content also changed. In addition, Videoland also influenced its subscribers by using references to binge-watching when talking about watching a TV series on Videoland, as can be seen in the following examples: “Subscribers can binge-watch the entire new season; watch in one go” (RTL Nederland, 2017, para. 1), “The miniseries 'Mocro Maffia: Komt Goed' can now be binged at Videoland” (RTL Nederland, 2021, para. 7), and “this season once again provides a series of episodes that you want to watch in the same breath” (RTL Nederland, 2016, para. 1). Another way Videoland has referenced binge-watching, was when they organised a ‘binge-watch party’ for fans of the Videoland Original series *Zwarte Tulp*. Fans of the show could win one of the 25 tickets to this exclusive event, which took place before the season launched on Videoland. During this binge-watch party fans were able to watch the entire new season in one night (RTL Nederland, 2016). These examples once again show how Videoland uses the term binge-watching in its marketing strategy, which gives its viewers a certain idea of how the shows should be watched.

That this approach has worked can be seen in the results of the streaming service over the past years. Multiple interviews with Videoland representatives revealed that there was higher subscriber activity on the platform than before (TV Key Facts, n.d.) and subscribers’ time watching Videoland kept increasing (RTL Nederland, 2020). Van der Vorst said in an interview that Videoland now had

over one million paying subscribers and their viewing time was almost twice as much as last year (TV Bizz Magazine, n.d.). These statistics confirm that the Netflix effect also has influenced the viewing behaviour of Videoland its subscribers. Videoland has taken advantage of this by responding to this effect with its marketing strategy as can be seen in the examples above.

4.4 Consumer-focused

When the Fan Centric-strategy was launched in 2018, RTL Netherlands and Videoland started to focus more on the needs and motivations of its consumers. Considering the consumer was now the central point of Videoland its strategy, they tried several things to create a better connection with its subscribers, serve different target audiences, and pay extra attention to its fans. The Fan Centric-strategy was the first step in which could be seen that RTL Netherlands and Videoland were responding to the wishes of viewers. RTL Netherlands explains in the accompanying press release that it takes the Dutch consumer as the starting point for all developments and activities of the company. Sven Sauvé adds to this by saying the following:

By talking to our subscribers, we know that it is a great wish to have one place where you can see everything and where there is a lot of attention for Dutch content. This year we will take the step to merge all our online activities. (RTL Nederland, 2018, para. 6)

By making its strategy all about responding to the wishes of viewers, Videoland became more consumer focused and was able to find out what it was the consumer was looking for in a streaming service. By adjusting the platform with the comments of its viewers, Videoland was able to develop itself easily in a changing market. As was mentioned earlier in the results, Videoland changed its payoff to a more local orientated statement ('what happens in the Netherlands, plays at Videoland'). This was done after they listened to one of the viewers wishes for more local content. By listening to this and adapting its service to become a more local orientated streaming platform, Videoland was able to take a strong position in the Dutch media landscape. As a results, Videoland began to be known more for its local stories in the form of TV series and documentaries.

Videoland continued to listen to its subscribers during the first lockdown of Covid19. It released the new season of the Videoland Original series *Mocro Maffia* before the official release date, when fans of the show asked for an early release (RTL Nederland, 2020). By responding to very specific wishes of viewers, Videoland made them feel like they were being heard. Besides the early release of a new season, Videoland has done more things to treat its fans. Videoland for example invited fans to the premiere of a new season of a Videoland Original series (RTL Nederland, 2022), it offered fans the opportunity to help create a storyline for their favourite series (CMOTalk, n.d.), and special seasons or short films were made to surprise a fan base (RTL Nederland, 2021). By doing something extra for its fans, Videoland is improving the relationship with its viewers. A good

relationship is important for RTL Netherlands and Videoland, since they want to be able to talk to their customers. Van der Vorst said the following about this: "We use our creative skills and that of our presenters to connect with the Dutch viewer. I want us to be personal, recognizable and close" (RTL Nederland, 2019, para. 1). Brouwer adds to this by saying they "are transforming from a traditional, commercial channel to a B2C company, where we really talk to our customer. We have a direct relationship with a million paying people" (CMOTalk, n.d., para. 6). To achieve this, Videoland invested in customer care, so that they are in direct contact with its viewers (Jepma, 2019).

As was said earlier in this section, Videoland has been trying to implement the wishes of its viewers into its strategy. Not only does that include *when* the audience wants to see certain TV series, but also *what* they want to see. Videoland creating content based on its target audience, shows the importance of listening to the target audience for them. Sven Sauvé explains:

We will never step into anything because only the data analysis shows that there is a large audience for it. Of course, that data is guiding, but not the determining factor. We add our gut feeling and years of experience to this. (Entertainment Business, 2016, para. 7)

While RTL Netherlands and Videoland its competitors may base their content on what data analysis suggests, Sauvé rather uses their experience and knowledge about the target audience to determine what content they will produce. Insights about the target group lead to a better understanding what might work for the target audience, as can also be seen in the following example. The audience of RTL Netherlands "prefers to watch a series like *Divorce* or *Zwarte Tulp*. These series are interesting for a wider audience" (Entertainment Business, 2016, para. 6). According to Sauvé a TV series like *House of Cards* would not work for them since its only suitable for a limited audience. The content mix of Videoland is tailored to the target group by offering "a large amount of original Dutch series, supplemented with good international series and films, documentaries, cabaret and a wide, exclusive range for kids" (Entertainment Business, 2016, para. 6).

To be able to tailor the content even better to the target group, Videoland responded to the trends within the target group. They did this by actively looking at what trends affect its target group and how they could respond to those. An example of this is during the European Championships when people wanted to hear football stories from the past. Videoland created a series called *Villa Oranje* where former football players got together and shared their stories (CMOTalk, n.d.). By responding to trends within the target group Videoland ensures they are giving its audience content they are interested in, while also staying relevant by keeping its content up to date. This once again adds to making the target audience feeling heard, which will lead to a better connection with the audience. In addition, it also shows how the media industry has changed compared to the time where traditional TV channels broadcasted its content and could not easily receive feedback on it. Videoland and RTL Netherlands have put the needs of their viewers first with their new strategy,

making receiving feedback more important than ever. With this feedback, the content that is created will only match the target group even better.

The last element Videoland worked on is its user-friendliness. In addition to matching the content to the target audience and meeting their wishes, Videoland also improved its user-friendliness by working on its availability across multiple devices and its availability in different countries. Videoland has done this by adding different options to access the streaming platform. For example in 2015, when the option to access Videoland on Playstation 3 and 4 was added (RTL Nederland, 2015) and more recently when CMO Brouwer said they were “improving the way we support all the different devices out there, to make Videoland an excellent experience on all screens” (TV Key Facts, n.d., para. 6). Sauvé emphasized the accessibility of Videoland again in the following statement: “At Videoland people can watch *'Temptation'* on all imaginable screens and at the moments that suit them” (RTL Nederland, 2018, para. 4). Aside from adding more options to watch Videoland on, Brouwer announced they had expanded the area in which Videoland was available so that subscribers did not have to miss anything during the summer period. Videoland expanded its region from the Netherlands to the entire European Union on April first, 2018 (RTL Nederland, 2018). By creating a platform that works well in a lot of difference places and on different devices, it increases the likeliness that the platform will be used by customers since it is very user-friendly.

4.5 New talent

The final change that RTL Netherlands implemented in its strategy for Videoland was investing in new talent. In the past ten years, RTL Netherlands has set up many opportunities for new talent in the industry, which in return has given them content for Videoland its library. In line with what was discussed earlier, Videoland was trying to make more local productions to respond to the wishes of its viewers. One of the ways they were able to do this was by investing and creating opportunities for new talent. As was mentioned earlier when discussing Videoland its collaborations, Videoland worked with ‘De Ontmoeting’ in 2018. De Ontmoeting was a Dutch short film financing project that focused on talent development and the distribution of films. Videoland chose one film from all submissions to co-develop, which could later be seen at film festivals and on Videoland. By working on this project, Videoland is offering talented people that are new to the industry the chance to share their ideas and develop their skills (RTL Nederland, 2018). This collaboration was helpful for Videoland since it gave them new content for its library and did something for young talent in the Dutch industry.

Videoland continued to support new talent in 2019 when it launched ‘Videoland Academy’. This initiative offered talented new filmmakers the opportunity to make films and documentaries, with the help of masterclasses and the assistance of experienced filmmakers. RTL Netherlands called it “a

unique opportunity to develop, gain experience within professional practice and show their talent to a wide audience" (RTL Nederland, 2019, para. 6). Videoland Academy ended up having two more editions in 2020 and 2021 that both focused on different film genres. These editions resulted in many highly successful projects that premiered at Videoland at the beginning of 2022 (RTL Nederland, 2021). The success of Videoland Academy shows how important it is for Videoland to involve young talent in its productions. Many of the TV series and documentaries that were created during Videoland Academy have become successful because of the ideas of young creators. These young filmmakers often have a better sense of what is going on in society, which is important for Videoland since they want to produce content that is connected to what happens in society. Creating local content that reflects Dutch culture and what happens in the Netherlands is easier when it is done by someone who understands it well.

Aside from investing in young talent when creating films and documentaries, Videoland also offered opportunities to young actors. Achmed Akkabi who is one of the creative producers of the show '*Mocro Maffia*' decided to give a young actor the main role in the new spin-off series '*Mocro Maffia: Komtgoed*'. Antoinette Beumer, head of Drama at Videoland explained this in an interview:

Videoland likes to offer a stage to young talent. Achmed's choice to offer a young actor this opportunity and also to broach a very topical subject is, in our opinion, a golden combination. The choice of young director Aaron van Valen also fits very well with how we at Videoland think about talent development processes. (RTL Nederland, 2021, para. 4)

This example shows that Videoland likes to offer young talent opportunities to work on its productions. By providing them opportunities Videoland is able to discover new talent to use in its future productions, as well as keep their current productions up to date with what is going on in society at that moment.

5. Conclusion

This thesis explores the changes in the marketing strategy for the Dutch VOD service Videoland. The streaming service was bought by RTL Netherlands in 2013 in order to compete against international players who were entering the Dutch VOD market and threatening the existence of traditional TV. Videoland was an unknown VOD service at the time, however, ten years later it had become the biggest Dutch streaming service. Previous research on streaming services mostly looked at international VOD services, while research on the impact of the changing media industry on local streaming services in the Netherlands and specifically Videoland had not been done yet. That is why the following research question was created: "Which strategic shifts has RTL Netherlands applied to Videoland to respond to the changing media industry?". By reviewing existing theory on the topic and applying a media industry studies approach to publicly available materials, an answer was found to this question. The answer will be given in the next section by discussing the most relevant results that were found in the data.

From the data, the following five themes emerged: VOD-focused, content, binge-watching, consumer-focused, and new talent. The themes each consisted of several subcategories and displayed the main strategic shifts that RTL Netherlands has applied to its strategy for Videoland over the past ten years. One of the first changes that was noticeable in RTL Netherlands' strategy was how it became more focused on VOD activities. By acquiring the rights of the recently launched streaming service Videoland, RTL Netherlands was able to keep up with the changes in the media landscape and enter the VOD market. In addition, RTL Netherlands also decided to strengthen its management team to improve its knowledge of digital activities by adding Sven Sauvé as CEO, Lucien Brouwer as CMO and Peter van der Vorst as director content and marketing. Their expertise led to multiple strategic developments, including the merger of all RTL Netherlands' OTT activities and the implementation of its Fan Centric strategy. Both changes were meant to strengthen Videoland its position by bringing more content to the platform and creating better conditions to face potential competitors. In addition, Videoland collaborated with different media companies to continue to add new content to its library and worked on its subscription models to attract new customers. Besides attracting new customers, Videoland its new approach and changed position in the Dutch media landscape also led to different competitors. A striking development is the collaboration with its biggest rival on traditional TV, Talpa Network, to be able to compete with international VOD services. In doing so, Videoland is ignoring local Dutch competitors and completely focussing on streaming services such as Netflix and HBO.

Along with its strategy, Videoland its library also changed since the beginning of the platform. In the first few years, its focus was on keeping the library updated with different shows by acquiring the

exclusive VOD rights of international series and by frequently adding new seasons and episodes. Videoland later switched to a different approach when they started focusing more on adding local content. Along with its pay-off '*what happens in the Netherlands, plays at Videoland*', Videoland started distinguishing itself with local stories that reflected the interests of the Dutch audience. By paying attention to what their audience was interested in, Videoland was able to create successful tv shows and documentaries called Videoland Originals. Aside from focusing on local content and creating its own content, Videoland also worked on exclusive content for its platform. Videoland produced the first Dutch TV series exclusively for VOD and has launched several TV series on its platform before they premiered on its TV channels.

Apart from adding and producing more content for its viewers to watch, Videoland also started to advertise its content differently. With people spending more time consuming content, Videoland reacted to this in a way that would stimulate its viewers to watch more of its content as well. This was for example done by releasing entire seasons of a series at once, but also by making references to binge-watching when communicating about a Videoland Original series. Videoland representatives often mentioned in interviews how the screen time of Videoland subscribers had increased over the years and that there was higher activity on the streaming service than in the years before.

Besides tracking the activity of its subscribers, Videoland also has been trying to strengthen the connection with its viewers. The implementation of the Fan Centric strategy put the fans of Videoland central and made sure the focus was on their needs and motivations. Videoland started responding to their special request and did extra things for fans. They for example involved fans in the production of their favourite show and created extra content to surprise fans. In addition, Videoland started to pay attention to whether the content they were producing suited its audience. By watching trends and using its experience, Videoland was able to tailor its content to its target audience. Videoland also worked on the user-friendliness of the platform, by making it accessible on every device and in every country in the European Union.

Another element Videoland focused on, was investing in new talent. By producing local content, Videoland worked on providing opportunities for new talent in the industry. By collaborating on projects such as De Ontmoeting and launching Videoland Academy, Videoland was actively trying to get more involved in offering young filmmakers and actors the chance to work on successful Videoland projects.

To answer the research question, it can be concluded that RTL Netherlands ultimately made three major changes to its strategy. The first change is its focus on the VOD market, which started when it acquired the rights to Videoland. This takeover was followed by RTL Netherlands strengthening its management team to have more knowledge about the market they were operating

in and entering into the right partnerships to improve the content in its library. RTL Netherlands even went as far as merging with its biggest competitor in the Dutch market to be able to compete with foreign players. The second change that has been leading in RTL Netherlands its strategy is focusing on the needs and motivations of its viewers. By implementing the Fan Centric-strategy, RTL Netherlands' connection with the viewer improved and it became clearer what their wishes were. From this came the third change. By focusing on the viewer's wishes RTL Netherlands found out that viewers were interested in seeing more local content on the platform. Videoland distinguishes itself from other streaming services on the Dutch market by offering local content that is tailored to the wishes of its target group. Instead of selecting content that resonates with large groups, Videoland looks at what suits its viewers. In addition, Videoland produces a large part of the content on the platform itself, which makes it easy to create local content that meets the wishes of its subscribers. Videoland summarizes this change in its pay-off "*what happens in the Netherlands, plays at Videoland*".

This study has provided relevant new insights into the marketing strategies used in the Dutch media industry. Since previous studies were mostly focused on international streaming services and lacked information about local streaming services like Videoland, this thesis adds to the limited existing research on the Dutch market. It offers insights into the Dutch media landscape as well as a specific part of the Dutch VOD market. This information makes the thesis relevant to anyone wanting to study the Dutch VOD market or for other media companies within the industry.

This research revealed valuable information about the Dutch VOD market, however, there were limitations to the research. The first limitation was the use of thematic analysis since it is not fully subjective. The method makes reliability more difficult to ensure as it requires a lot of interpretation. The possibility exists that the same data would be coded and analysed differently by other researchers following the same coding process. The second limitation was found when collecting data for this research. The documents used for analysis were required to be over 300 words, which made collecting suitable data difficult since a lot of documents from RTL Netherlands were under 300 words. Many of these documents were short press releases providing monthly updates about Videoland. Although this data was not included in the thematic analysis, it could still be used by the researcher to support and interpret the results of the analysis. In addition, there were several interesting articles about Videoland as well as interviews with the management of RTL Netherlands about the merger with Talpa Network that were harder to access because they were behind paywalls. In most cases, this did not lead to problems because other articles were then used in which the required article or interview was discussed.

The potential merger between RTL Netherlands and Talpa Network could be interesting to include in future research regarding VOD. This could either include how the merger will influence

Videoland its position in the international VOD market, or how the merger will have an influence on the Dutch media landscape. This thesis also offers the opportunity to further investigate the Dutch VOD market, with a focus on how other VOD services besides Videoland are holding up in this changing industry.

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Appendix A: Coding Frame

Category	Subcategory	Illustrative quote
1: VOD-focused	Collaborations	<p>'Onze ambitie is om acht tot tien Nederlandse series per jaar te lanceren in samenwerking met de zender.'</p> <p><i>'Our ambition is to launch eight to ten Dutch series a year in collaboration with the channel.'</i></p>
	Competitors	<p>'We willen Videoland sterker maken. De concurrentie op het gebied van streamingdiensten neemt toe, zo komen ook Viaplay en HBO naar Nederland, en we vermoeden dat er nog wel meer partijen klaarstaan.'</p> <p><i>'We want to make Videoland stronger. Competition in the field of streaming services is increasing, Viaplay and HBO are also coming to the Netherlands, and we suspect that more parties are ready.'</i></p>
	RTL shifts focus	<p>'Directeur Content Peter van der Vorst geeft aan de focus te leggen op RTL 4, RTL 5 en Videoland.'</p> <p><i>'Content director Peter van der Vorst indicates that he will focus on RTL 4, RTL 5 and Videoland.'</i></p>
	Strategy changes	<p>'Het is dan ook een bewuste keus om met RTL actief in te spelen op video on demand (VOD). De overname van Videoland was de eerste grote stap in 2013 om in te spelen op de groeiende behoefte van de consument aan zelfregie in het televisiedomein.'</p> <p><i>'It is therefore a conscious choice to actively respond to video on demand (VOD) with RTL. The acquisition of Videoland was the first major step in 2013 to respond to the growing consumer need for self-direction in the television domain.'</i></p>
	Subscription changes	<p>'Videoland has just introduced new tiers to the products, hoping to attract new customers, while rewarding the loyalty of our current base. We have also introduced a hybrid tier, offering customers the choice to accept advertisements at a lower monthly rate, and introduced Live TV, allowing customers to watch the programmes on Videoland that are currently also playing on the broadcast channels.'</p>
2: Content	Exclusive content	<p>'Daarbovenop vind je originele titels, die je alleen kunt zien op Videoland. Dramaseries als Mocro Maffia, Lieve Mama. Daarmee bereiken we een groep liefhebbers.'</p> <p><i>'On top of that you will find original titles, which you can only see on Videoland. Drama series such as Mocro Maffia, Lieve Mama. That way we reach a group of enthusiasts.'</i></p>
	Local content	<p><i>'Content van eigen bodem is belangrijk voor ons platform, want Videoland is 100% gericht op de Nederlandse kijker.'</i></p> <p><i>'Local content is important for our platform, because Videoland is 100% focused on the Dutch viewer.'</i></p>

	Updated library	<p>'Dit jaar staan er meer dan 10 films en series in de planning bij Videoland waaronder de al eerder aangekondigde dramaseries Judas II en Sleepers.'</p> <p><i>"This year, more than 10 films and series are planned at Videoland, including the previously announced drama series Judas II and Sleepers."</i></p>
	Videoland Originals	<p>'Videoland kent inmiddels al diverse succesvolle Videoland Originals waaronder de dramaseries Mocro Maffia, Follow de SOA, Barrie Barista en het Einde der Tijden, Lieve Mama, Nieuwe Buren, Judas, Meisje van Plezier, Soof, De Twaalf van Oldenheim, De Twaalf van Schouwendam, Random Shit en Zwarte Tulp.'</p> <p><i>'Videoland already has several successful Videoland Originals, including the drama series Mocro Maffia, Follow de SOA, Barrie Barista en het Einde der Tijden, Lieve Mama, Nieuwe Buren, Judas, Meisje van Plezier, Soof, De Twaalf van Oldenheim, De Twaalf van Schouwendam, Random Shit en Zwarte Tulp.'</i></p>
3: Binge-watching	Release of multiple episodes at once	<p>'Bij Videoland zijn op het moment dat de 'The Good Doctor' bij RTL 4 start, direct negen afleveringen te bekijken'</p> <p><i>'At Videoland, the moment the 'The Good Doctor' starts on RTL 4, you can immediately watch nine episodes'</i></p>
	References to binge-watching	<p>'Abonnees kunnen het gehele nieuwe seizoen bingewatchen; in één ruk uitkijken.'</p> <p><i>'Subscribers can binge-watch the entire new season; look out in one go.'</i></p>
	Screen time Videoland subscribers increased	<p>'Per sessie kijken Videoland-abonnees gemiddeld 2,5 uur naar series, films en documentaires, een stijging van 30 minuten (2 uur in 2017).'</p> <p><i>'Videoland subscribers watch an average of 2.5 hours per session to series, films and documentaries, an increase of 30 minutes (2 hours in 2017).'</i></p>
4: Consumer-focused	Content based on target audience	<p>'Het draait natuurlijk vooral om welke doelgroep je wilt bereiken. Die van Videoland is bijna dezelfde als die van de zender. We richten ons primair op kijkers van 20 tot 35 à 40 jaar. De contentmix wordt daarop afgestemd. Een flinke hoeveelheid originele Nederlandse series, aangevuld met goede internationale series en films, documentaires, cabaret en een breed exclusief kidsaanbod.'</p> <p><i>'Of course it mainly comes down to which target group you want to reach. That of Videoland is almost the same as that of the channel. We primarily focus on viewers aged 20 to 35 to 40 years. The content mix is adjusted accordingly. A large amount of original Dutch series, supplemented with good international series and films, documentaries, cabaret and a wide, exclusive range for kids.'</i></p>
	Paying attention to fans	<p>'Als traktatie voor de trouwe fanbase hebben de makers van de populaire serie een 7-delige miniserie</p>

		<p>getiteld 'Mocro Maffia: Komtgoed' gemaakt, die vanaf vandaag op Videoland te zien is.'</p> <p><i>'As a treat for the loyal fan base, the makers of the popular series have created a 7-part miniseries entitled 'Mocro Mafia: Komtgoed', which can be seen on Videoland from today.'</i></p>
	Personal connection with viewers	<p>'We zetten ons makerschap en dat van onze presentatoren in om verbinding te maken met de Nederlandse kijker. Ik wil dat we persoonlijk, herkenbaar en dichtbij zijn.'</p> <p><i>'We use our makership and that of our presenters to connect with the Dutch viewer. I want us to be personal, recognizable and close.'</i></p>
	Responding to wishes of viewers	<p>'Onze video on demand activiteiten hebben ons veel geleerd over Fan Centric werken. Het gaat om continue toetsen als je iets ontwikkelt, leren van je fouten en soms betekent het kill your darlings als dat in het belang is van de consument. Door met onze abonnees te praten, weten we dat het een grote wens is om één plek te hebben waar je alles kunt zien en waar veel aandacht is voor Nederlandse content. Dit jaar nog maken we de stap om al onze online activiteiten samen te voegen.'</p> <p><i>'Our video on demand activities have taught us a lot about Fan Centric working. It's about continuous testing when you develop something, learning from your mistakes and sometimes it means kill your darlings if that is in the interest of the consumer. By talking to our subscribers, we know that it is a great wish to have one place where you can see everything and where a lot of attention is paid to Dutch content. This year we will take the step to merge all our online activities.'</i></p>
	Responding to trends within target group	<p>'Maar we doen ook kwantitatief en kwalitatief onderzoek. Welke trends spelen bij onze doelgroepen en hoe kunnen we daarop inspelen?'</p> <p><i>'But we also do quantitative and qualitative research. Which trends affect our target groups and how can we respond to them?'</i></p>
	User friendliness	<p>'We are also improving the way we support all the different devices out there, to make Videoland an excellent experience on all screens.'</p>
5: New talent	Investing in talent	<p>'RTL heeft oog voor nieuw talent en lanceert dit najaar, gesteund door het Nederlands Filmfonds, Videoland Academy. Videoland Academy biedt een aantal talentvolle nieuwe makers de kans om vier fictiefilms van 45 minuten en één documentaire drieluik te maken. Ze krijgen masterclasses en worden bijgestaan door ervaren makers. Een unieke kans om zich te ontwikkelen, ervaring op te doen binnen de professionele beroepspraktijk en hun talent te tonen aan een breed publiek. Minimaal drie jaar lang'</p>

		<p>investeert RTL elk jaar ruim 1 miljoen euro in dit project.'</p> <p><i>'RTL has an eye for new talent and will launch Videoland Academy this autumn, supported by the Netherlands Film Fund. Videoland Academy offers a number of talented new makers the opportunity to make four 45-minute fiction films and one documentary triptych. They receive masterclasses and are assisted by experienced makers. A unique opportunity to develop, gain experience within professional practice and show their talent to a wide audience. For a minimum of three years, RTL is investing more than 1 million euros in this project every year.'</i></p>
	Opportunities for talent	<p>'Met Videoland bieden we jong talent hét podium om hun werk onder de aandacht te brengen van een veelzijdig publiek.'</p> <p><i>'With Videoland we offer young talent the stage to bring their work to the attention of a versatile audience.'</i></p>