



RESULT AND RESEARCH

Picl 2016

INTRODUCTION

"Nobody wants to go to European art movies" headlined daily newspaper Het Parool in September 2014. According to Doreen Boonekamp, director of the Dutch Film Fund, this was not due to the lack of quality but the lack of public outreach. 'We have the solution' thought Noortje van de Sande and Anke van Diejen from Herrie Film & TV. For certain kind of films the classic windows works too limiting in order to reach the changed and more demanding consumer. But easier said than done. How do we convince movie theaters that day-and-date releases (screening at the theater and at the same time on VOD) is not only of interest to the movie but to them as well? After much talk and going back to the drawing board, a new model emerged where all parties (movie theaters, distributors and consumers) can benefit from. And thanks to many progressive cinema programmers, directors and a brave distributor we started the adventure Filmthuis. First with a pilot project running from March 2016 till November 2016, starting the official service form December 1st 2016 with 14 of the largest independent Cinemas in The Netherlands participating.

Noortje of Sande and Anke Diejen

Filmthuis (Picl from March 2017)



FILMTHUIS 2016

For many years Herrie Film & TV, publicity-, marketing- and distribution bureau, provides publicity and marketing for mostly Dutch arthouse films and documentaries. Besides this, the last few years Herrie has been working closely with the producer to distribute. Often those films that need a different approach towards the public than many mainstream distributors present. Herrie has perceived that this is a very intensive and expensive district and that reaching the public stays limited. Screenings in the film theatres are often short and there is always a limited marketing budget available.

A second life on Video on Demand is often impossible due to the fact that platforms aren't selecting the small films or by that time (a window of a few months) there simply isn't a marketing budget to bring the films under the publics' attention. 'We can change this' was the mindset and so Filmthuis was created.

After a **test and analysis in 2015** considering Filmthuis in 6 cinemas and with the film ZOMER by Colette Bothof, we obtained sufficient positive results to keep Filmthuis a permanent service.

We started a **pilot on the 24th of march 2016**, by the alias Filmthuis, in 13 film theatres with the film *Transit Havana* by distributor Cinema Delicatessen.

What have we accomplished in the meantime?


Overview films offerd on Picl so far (March 2016 - March 2017)	
Offered films	67
European films	52 (77%)
Total amount of paid views (€ 8,50)	2.782
Total boxoffice	€ 23.647,-

PARTICIPATING CINEMAS

Amersfoort - Lieve Vrouw
 Amsterdam – Ketelhuis
 Amsterdam - De Balie
 Amsterdam – EYE
 Amsterdam – Rialto
 Breda - Chassé Cinema
 Den Haag - Filmhuis Den Haag
 Enschede – Concordia
 Haarlem – Filmschuur
 Hilversum – Filmtheater Hilversum
 Nijmegen – Lux
 Rotterdam – LantarenVenster
 Utrecht – 't Hoogt
 Zwolle - Filmtheater Fraterhuis



As of March 2017 Filmthuis is rebranded as Picl: In cinemas now. Now in your living room.



Discover cinema

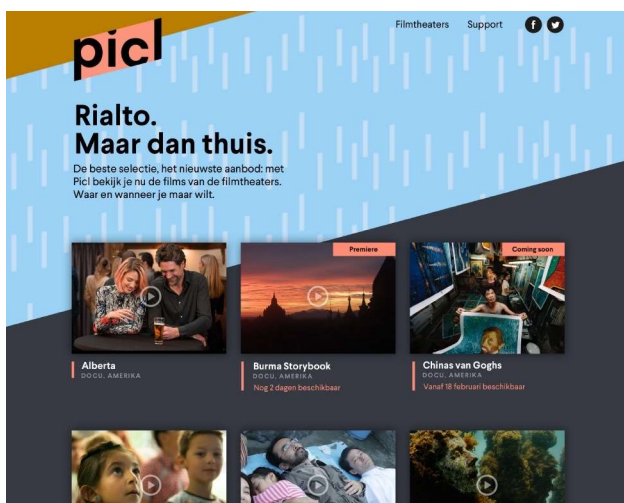
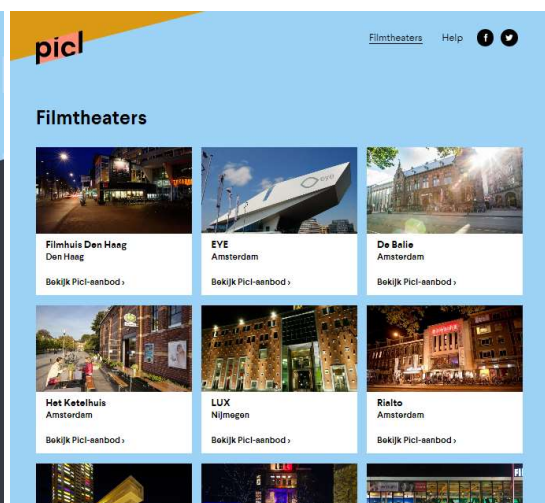
We work directly with Dutch cinemas who have selected the most exceptional, award-winning, quality films: just for you.

Don't miss a thing

We offer you films that are screening in the cinemas right now. The latest arthouse films, straight away on your own screen at home. So you don't need to miss a thing!

Your way

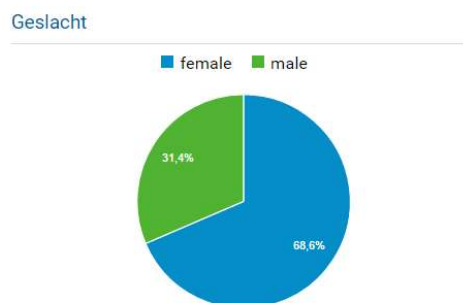
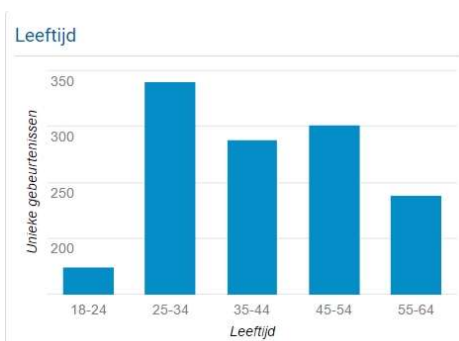
It's really simple: transform your home into a personal cinema with just a few clicks. Whenever its suits you.

USER PROFILE PICL – March 2016 - 2017

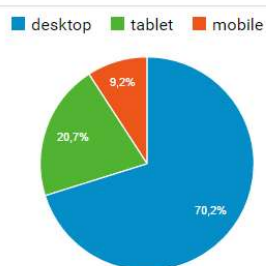
AGE: Most viewers are between 25 and 34 years

SEX: Almost 69% of the users is female, 31% male



DEVICE: Most users watch the films on their desktop (70%)
a small percentage watches the film on their mobile (9%).

Apparaat



SUPPORT FROM THE INDUSTRY

Films on Picl are offered in collaboration with over 14 distributors and festivals: Cinemien (ABC filmdistribution), Cinema Delicatessen, Mokum Film distributie, Filmfreak, Amstelfilm, Periscoop Film, September Film, Cineart, Cherry Pickers, Arti Film and festivals as International Film Festival Rotterdam, Netherlands Film Festival and Movies that Matter Festival.

Also Picl is financed by Creative Europe, Nethetalnds Film Fund and the EYE Film Institute.

LEGAL

Picl is an initiative from VOF Herrie Film & TV and is legally accommodated in the Foundation Netherlands Film Promotion. By these means, the support from the cinemas and the European and Dutch arthouse film is at all times secured and prioritized. The Foundation Netherlands Film Promotion retrieves no profit.

BOARD MEMBERS OF STICHTING NEDERLANDSE FILMPROMOTIE

Jaap Bruijnen – Managing Director at NVPI; Dutch industry organization film, music & games distributors (chairman)

Mark Drenth – Head Film & Theater at Concordia Film | Theatre | Exposition (treasurer)

Thomas Fransman – Head of proqraming and communication at Het Ketelhuis (secretary)

APPENDIX I: FULL LIST OF TITLES OFFERD ON FILMTHUIS/ PICL

APPENDIX II: RESEARCH FILMTHUIS/PICL



APPENDIX I:
FULL LIST OF TITLES OFFERD ON FILMTHUIS/ PICL

Date of Picl release	Title	Distributor	Country	Euro
26-2-2016	Janis: Little Blue Girl	Periscoop Film	USA	
24-3-2016	Transit Havana	Cinema Delicatessen	Nederland	X
7-4-2016	Second Coming	Herrie Film	UK	X
7-4-2016	The Prosecutor	Mokum Film	Bulgarije, Zweden, Nederland	X
7-4-2016	Ik wil gelukkig zijn	Mokum Film	Nederland	X
19-5-2016	Rebels	Cinema Delicatessen	Noorwegen/NL	X
19-5-2016	Creative Control	De Filmfreak	USA	
26-5-2016	Bugs	Herrie Film	Denemarken/NL	X
16-6-2016	Stop Acting Now	Topkapi/Wunderbaum	Nederland	X
1-7-2016	All about E	Cinemien	Australië	
1-7-2016	Liz in September	Cinemien	Venezuela	
1-7-2016	Tru Love	Cinemien	Canada	
1-7-2016	Girls Lost	Cinemien	Zweden	X
1-7-2016	Departure	Cinemien	Groot Brittanië	X
1-7-2016	Theo & Hugo	Cinemien	Frankrijk	X
1-7-2016	Viva	Cinemien	Ierland/Cuba	X
1-7-2016	Holding the Man	Cinemien	Australië	
1-7-2016	Inside the Chinese Closet	Herrie Film	Nederland/China	X
27-7-2016	Les Ogres	Cherry Pickers	Frankrijk	X
11-8-2016	Out of Love	Cinemien	Nederland	X
8-9-2016	Bodkin Ras	Mokum Film	Nederland/België	X
29-9-2016	Full Contact	September film	Nederland, Kroatie	X
29-9-2016	History's Future	Cineart	Nederland	X
29-9-2016	A Family Affair	Conijn film	Nederland, België, Denemarken	X
29-9-2016	Hooligan Sparrow	MTMF	China/Verenigde Staten	
15-9-2016	Lo and Behold	Periscoop	Verenigde Staten	
29-9-2016	La Tierra Y La Sombra	Amstel Film	Colombia/NL	
6-10-2016	Fukushima, mon amour	Cinemien	Duitsland	X
3-11-2016	Les Chevaliers Blancs	MTMF/ Amstel	België/Frankrijk	X
29-9-2016	The Other Side	EYE	Frankrijk/Italië	X
27-10-2016	Clash	Amstel Film	Egypt	
3-11-2016	Remainder	Cinemien	Groot - Brittanië	X
17-11-2016	Shadow world	Periscoop	België/Denemarken/VS	X
15-12-2016	China's van Goghs	Cinema Delicatessen	China, Nederland	X
5-1-2017	How to meet a mermaid	Mokum Filmdistributie	Nederland / Denemarken / België	X
29-12-2016	I Pugni in tasca (uit 1965 restored)	Cinemien	Italië	x
29-12-2016	Sangue del mio sangue (2015)	Cinemien	Italië, Frankrijk, Zwitserland	x
24-11-2016	De kinderen van Juf Kiet	Mokum Film	Nederland	x
5-1-2017	The Violin Teacher	Arti Film	Brazilië	
19-1-2017	On The Other Side	Cinemien	Kroatië	x



26-1-2017	The Student	Arti Film	Rusland	
2-2-2017	Burma Storybook	Cinema Delicatessen	Nederland/Noorwegen	x
2-2-2017	To Stay Alive - A Method	Contact Film	Nederland	x
23-2-2017	If the sun explodes	Mokum Filmdistributie	Nederland	x
2-3-2017	Zaatari Djinn	Cinema Delicatessen	Nederland	x
2-3-2017	Harmonium	Imagine	Japan, Frankrijk	x
13-3-2017	Un Bacio	Arti Film	Italie	x
21-3-2017	Anne & Jean Paul, onze wereld	Herrie/St Geelprodukt	Nederland	x
21-3-2017	Anne Anders	Herrie/St Geelprodukt	Nederland	x
23-3-2017	Magallanes	Mooov	Peru, Argentinië, Spain	
24-3-2017	I, Daniel Blake	Cinéart	UK	x
24-3-2017	Fuocoammare	Cinéart	Italie/Frankrijk	x
24-3-2017	Clash	Amstelfilm	Egypte	
24-3-2017	As I Open My Eyes	Mooov	Belgie/frankrijk	x
30-3-2017	Waldstille	Contact Film	Nederland	x
30-3-2017	Noces	Imagine	Belgie/frankrijk	x
30-3-2017	The Island and The Whales	Amstelfilm	UK/Denemarken	x
30-3-2017	Life Animated	Periscoop Film	US	
1-4-2017	A Good Wife	Film Boutique	Servie/kroatië	x
6-4-2017	Glory	Arti Film	Bulgarije/Griekenland	x
6-4-2016	Toen mijn vader een struik werd	Lemming Film	Nederland	x
1-5-2017	Raving Iran	Movies that Matter	Zwitserland	x
2-5-2017	Jonathan	Arti Film	Duitsland	x
18-5-2017	Auf Einmal	Topkapi	Duitsland, Nederland, Frankrijk	x
25-5-2017	Sami Blood	Cinemien	Zweden	x
8-6-2017	Through the wall	Cinemien	Israël	
22-6-2017	Tramontane	Cinemien	Frankrijk	x
	European film			76%



APPENDIX II

RESEARCH FILMTHUIS/PICL

The Dutch Film Research Foundation (Stichting Filmonderzoek) has carried out research for Stichting Nederlandse Film promotie into the questions below concerning watching film premieres in your own home through arthouse cinemas. The Dutch Film Research Foundation is an independent market research agency that focuses principally on the film sector in the Netherlands. www.stichtingfilmonderzoek.nl

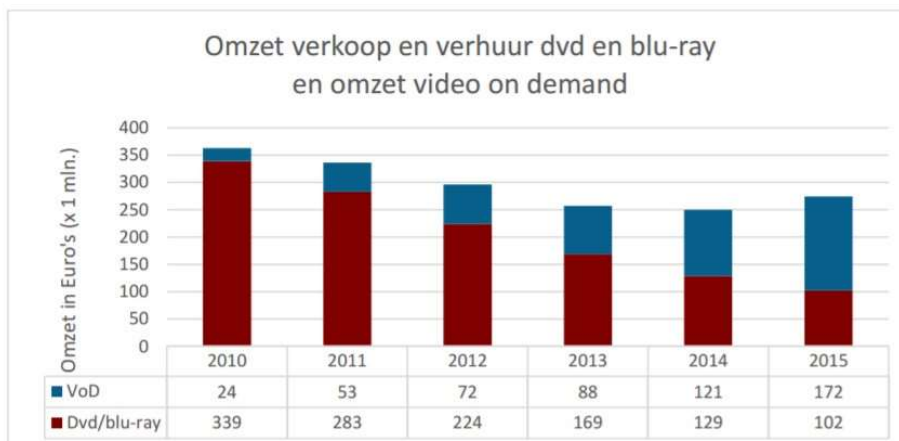
1. What is the present situation on the cinema and VOD markets in the Netherlands?
2. What potential does Filmthuis offer, and will Filmthuis have a negative impact on cinema visits?

1. MARKET RESEARCH NETHERLANDS: How do people in the Netherlands watch films at home?

(Dutch Film Research Foundation November 2016)

Growth in Video-On-Demand

The home viewing market has changed dramatically in recent years. Sales of DVDs and Blu-rays are under ever-increasing pressure, and have fallen by 70% since 2010. The supply of and turnover from Video-On-Demand (both by subscription and pay-per-view) on the other hand has increased in the same period. The changed supply of platforms, and in particular viewing from illegal sources, have played a major role in this.

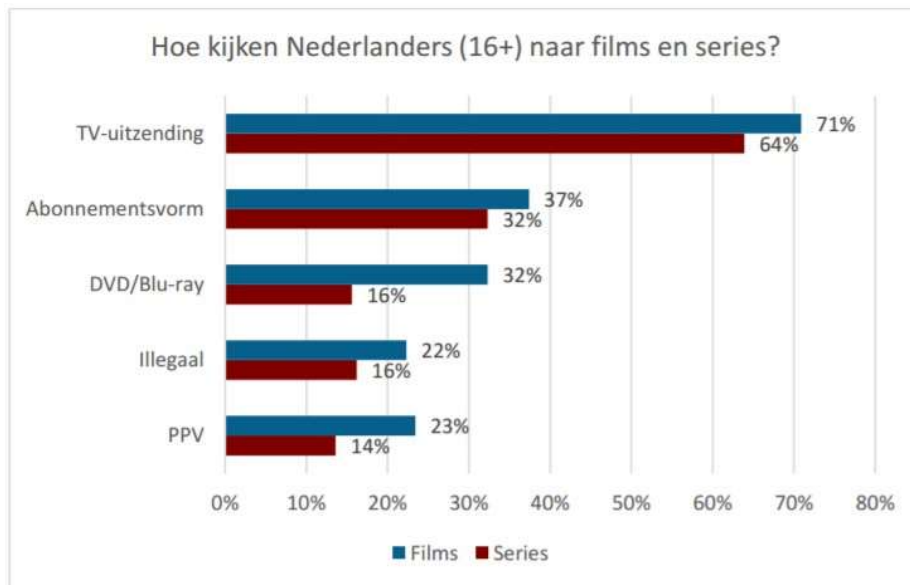


[Turnover sales and rental DVD and Blu-ray and turnover Video-On-Demand; Turnover in Euros (x 1 m)]

A little over half (56%) of residents of the Netherlands aged 16 years and older sometimes pay to watch a film at home, either through paid online services, paid film channels or DVD and Blu-ray. This is equal to the percentage of residents of the Netherlands who sometimes go to the cinema. Of all the possible paid ways to watch films at home, subscription services are the most used, with 37% of residents of the Netherlands making use of such a service to watch films at home. 23% of residents of



the Netherlands use pay-per-view services to watch films at home.

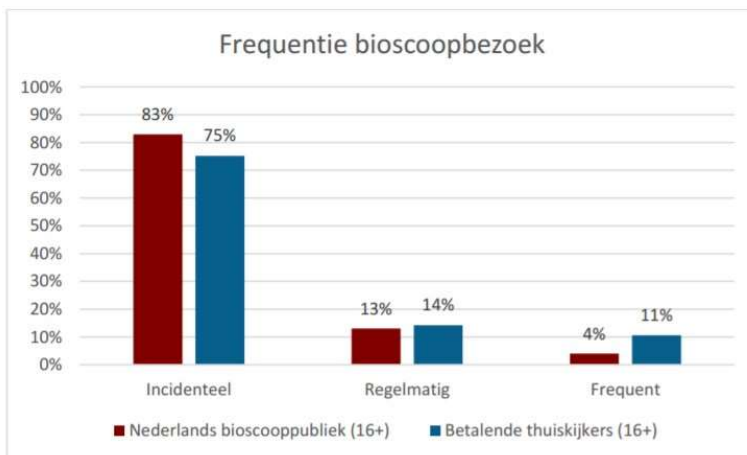


[How do residents of the Netherlands (16+) watch films and series? TV broadcast; Subscription; DVD/Blu-ray; Illegal; PPV]

Home viewing and cinema visits

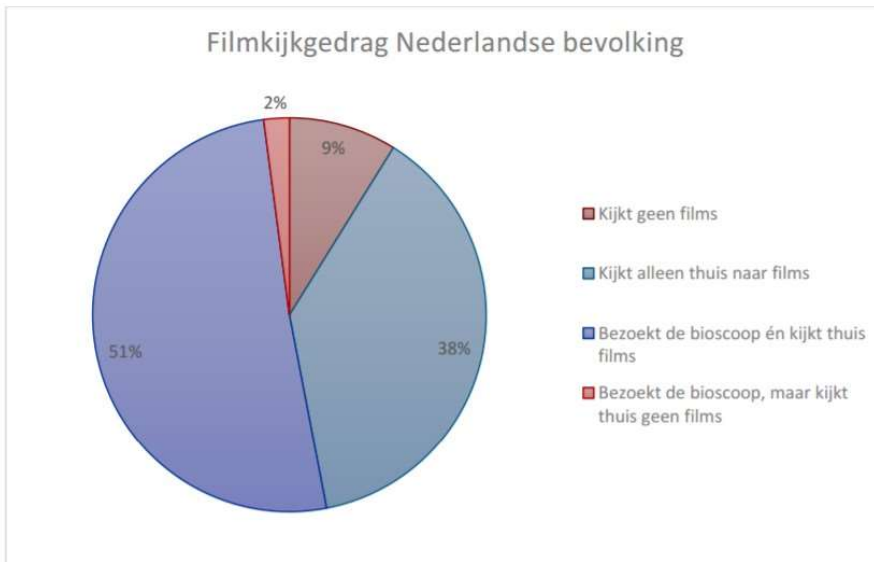
There is a positive correlation between viewing films at home and visiting the cinema. It seems that, rather than replacing one another, these two forms of consumption actually reinforce one another.

96% of people who visit the cinema also watch films at home. 79% of cinema visitors pay to watch films at home. Most of these do so by using subscription services (55% of cinema visitors).



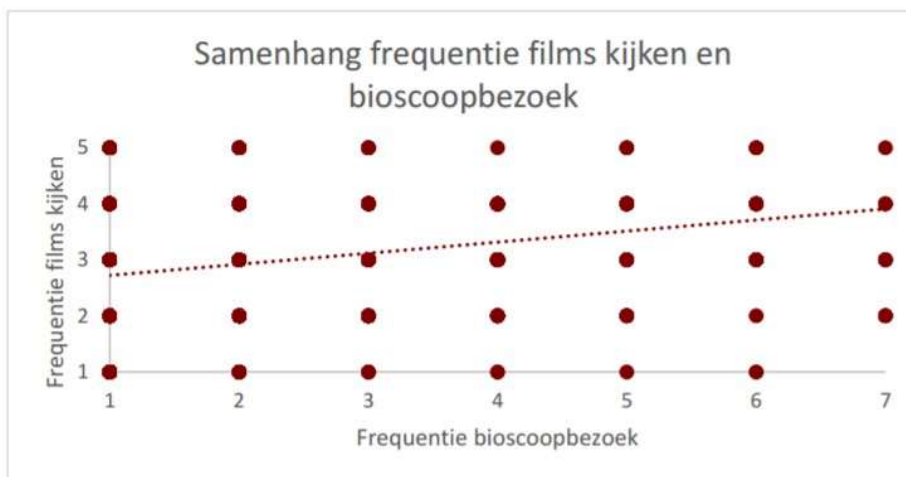
[Frequency of cinema visits; Occasional; Regular; Frequent. Dutch cinema audiences (16+); Paying home viewers (16+)]





[Film-watching behaviour residents of the Netherlands; Don't watch films; Only watch at home; Visit the cinema and watch at home; Visit the cinema but don't watch at home]

The more frequently people watch films and series at home, the more frequently they visit the cinema.



[Correlation of frequency of film-watching with cinema visits; Frequency of film-watching; Frequency of cinema visits]

Profile paying home viewers

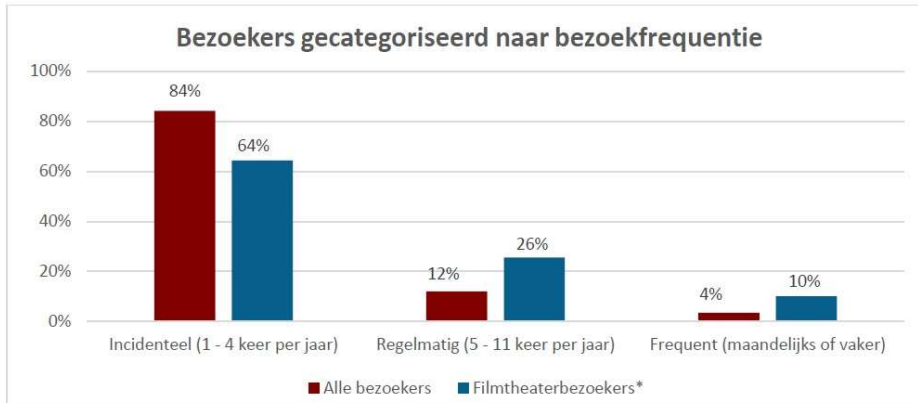
Paying home viewers are more likely to have a higher level of education and/or higher income than non-paying home viewers. They are also more likely to live in a highly urbanised environment. In terms of family, paying viewers are more often people with children.

More than two thirds of paying home viewers are cinema visitors (68%), compared to 56% of the general population of the Netherlands. Approximately 16% of paying home viewers visit the arthouse cinema. This percentage is slightly higher than that for the general population of the Netherlands who visit the arthouse cinema, namely 12%. Although paying home viewers mostly visit the cinema occasionally, they still go to the cinema more frequently than the average cinema audience in the Netherlands.

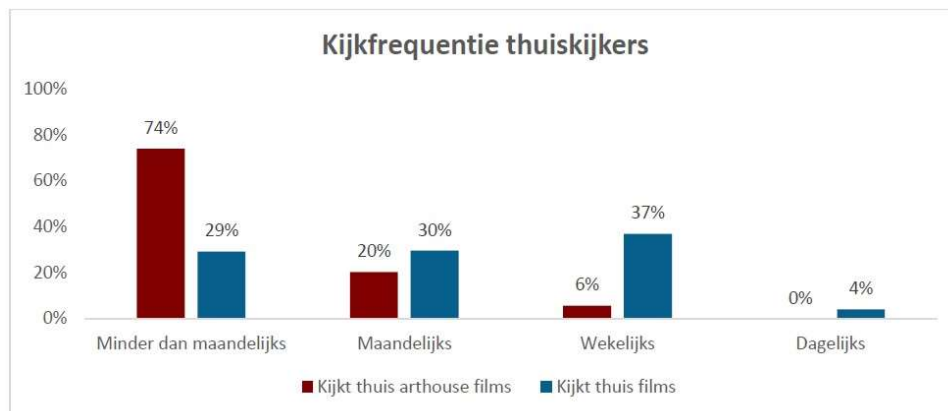


Use of pay-per-view services

A little over one fifth (23%) of the population of the Netherlands watch films at home using pay-per-view services. People with higher incomes (2,600+ Euros a month after tax), people with children living at home and people in the age groups 16-23 years and 30-39 years stated more often than other demographic groups that they sometimes use pay-per-view.

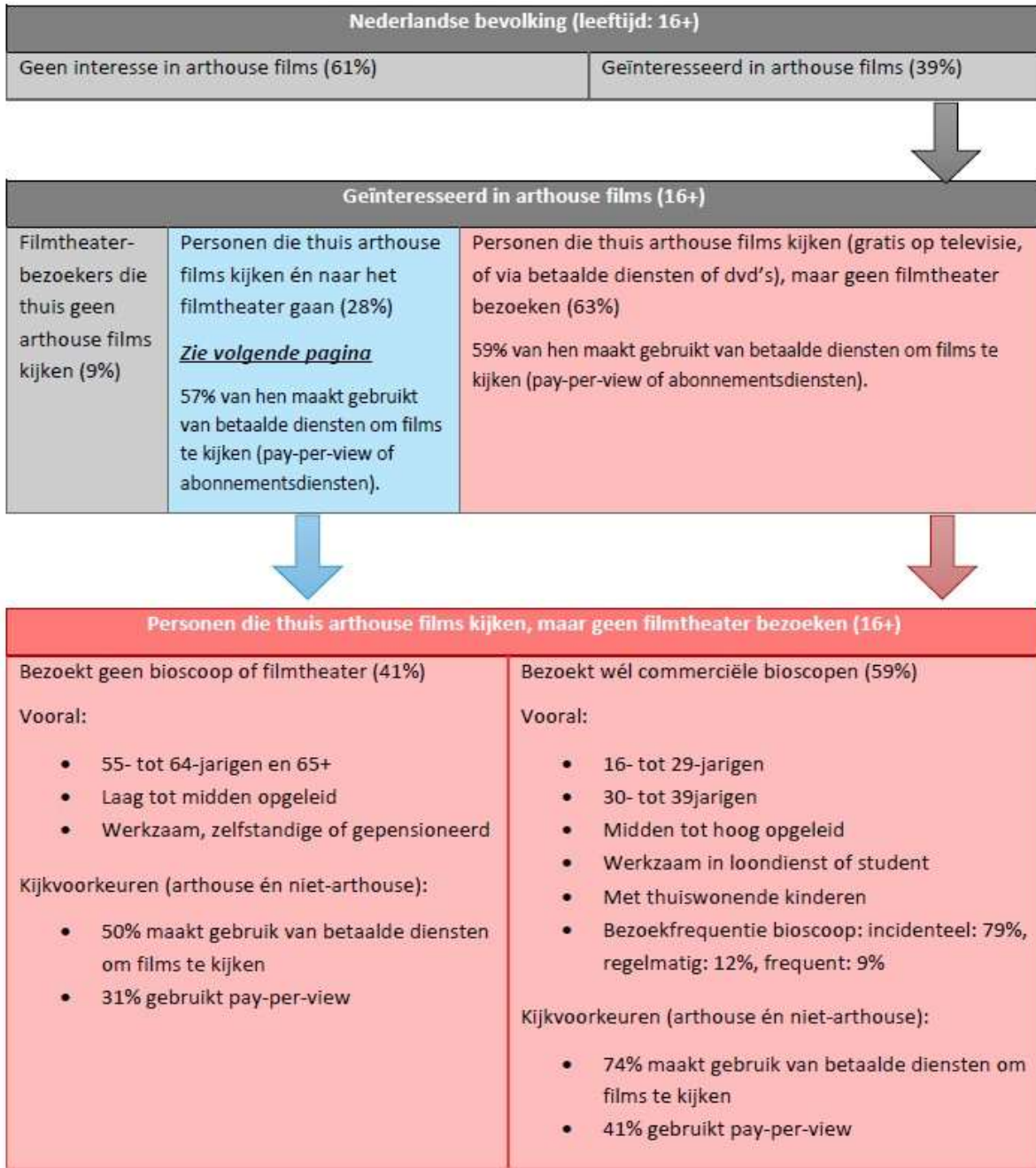


[Visitors classified by frequency of visits; Occasional (1-4 visits a year); Regular (5-11 visits a year); Frequent (once a month or more often); All visitors; Arthouse cinema visitors*; Arthouse cinema visitors classified by frequency of visits in 2015 (Visitors, aged 16+). *Results statistically insignificant.]



[Viewing frequency home viewers; Less than monthly; Monthly; Weekly; Daily; Watch arthouse films at home; Watch films at home; Viewing frequency home viewers during the past 12 months (Home viewers, aged 16+).]





[Population of the Netherlands (age: 16+); No interest in arthouse films (61%); Interested in arthouse films (39%);

Interested in arthouse films (16+); Arthouse cinema visitors who do not watch arthouse films at home (9%); People who watch arthouse films at home and go to the arthouse cinema (28%); See next page; 57% of these make use of paid services to watch films (pay-per-view or subscription services); People who watch arthouse films at home (for free on television, or through paid services or DVDs), but who do not visit the arthouse cinema (63%); 59% of them make use of paid services to watch films (pay-per-view or subscription services);

People who watch arthouse films at home, but who do not visit the arthouse cinema (16+); Don't visit the cinema or arthouse cinema (41%); Mainly: 55 to 64-year-olds and 65+; low to intermediate educational level; employed, self-employed or retired; Viewing preferences (arthouse and non-arthouse): 50% make use of paid services to watch films; 31% make use



of pay-per-view;

Do visit the commercial cinemas (59%): Mainly: 16 to 29-year-olds; 30 to 39-year-olds; intermediate to high educational level; in employment or studying; have children living at home; cinema visiting frequency: occasional 79%, regular 12%, frequent 9%; Viewing preferences (arthouse and non-arthouse): 74% make use of paid services to watch films; 41% make use of pay-per-view.]

Filmtheaterbezoekers die ook thuis arthouse films kijken (16+)	
Bezoekers van enkel filmhuizen (37%):	Bezoekers van zowel filmtheaters als commerciële bioscopen (63%):
Vooraf:	Vooraf:
<ul style="list-style-type: none">• 40+, met name 55+• Geen thuiswonende kinderen• Hoog opgeleid• Bezoekfrequentie filmtheater én bioscoop: incidenteel: 67%, regelmatig: 13%, frequent: 20%	<ul style="list-style-type: none">• 16- tot 29-jarigen• 30- tot 39jarigen• Hoog opgeleid• Werkzaam in loondienst of student• Met thuiswonende kinderen• Bezoekfrequentie filmtheater én bioscoop: incidenteel: 56%, regelmatig: 28%, frequent: 17%
Kijkvoorkeuren (arthouse én niet-arthouse):	Kijkvoorkeuren (arthouse én niet-arthouse):
<ul style="list-style-type: none">• 48% maakt gebruik van betaalde diensten om films te kijken• 24% gebruikt pay-per-view	<ul style="list-style-type: none">• 71% maakt gebruik van betaalde diensten om films te kijken• 36% gebruikt pay-per-view

[Arthouse cinema visitors who also watch arthouse films at home (16+) Visitors to arthouse cinemas only (37%):

Mainly: 40+, and particularly 55+; no children living at home; high level of education; frequency of arthouse cinema and cinema visits: occasional 67%, regular 13%, frequent 20%; Viewing preferences (arthouse and non-arthouse): 48% make use of paid services for watching films; 24% use pay-per-view.

Visitors to both arthouse cinemas and commercial cinemas (63%):

Mainly: 16 to 29-year-olds; 30 to 39-year-olds; high level of education; employed or studying; have children living at home; visiting frequency arthouse cinema and cinema: occasional 56%, regular 28%, frequent 17%; Viewing preferences (arthouse and non-arthouse): 71% make use of paid services to watch films; 36% use pay-per-view.

Overview representing target groups with an interest in arthouse films (aged 16+). N.B.: occasional = 1 to 4 times a year, regular = 5 to 11 times a year, frequent = once a month or more often.]

2. Follow-up research among arthouse cinema visitors

Dutch Film Research Foundation December 2016

At the end of 2016 a follow-up survey was carried out, also by The Dutch Film Research Foundation. The aim of this survey was to obtain greater insight into the potential negative effect of Filmthuis on visits to arthouse cinemas.

Great interest in Filmthuis

In total, half of the respondents (356 in total) stated they would be interested in using Filmthuis in the future. This was more than half of the people who hadn't yet heard of Filmthuis and more than one third of people who knew about Filmthuis but hadn't as yet made use of it. In addition, 100% of current Filmthuis users said they would continue to make use of Filmthuis in the future.

Preference for arthouse cinema



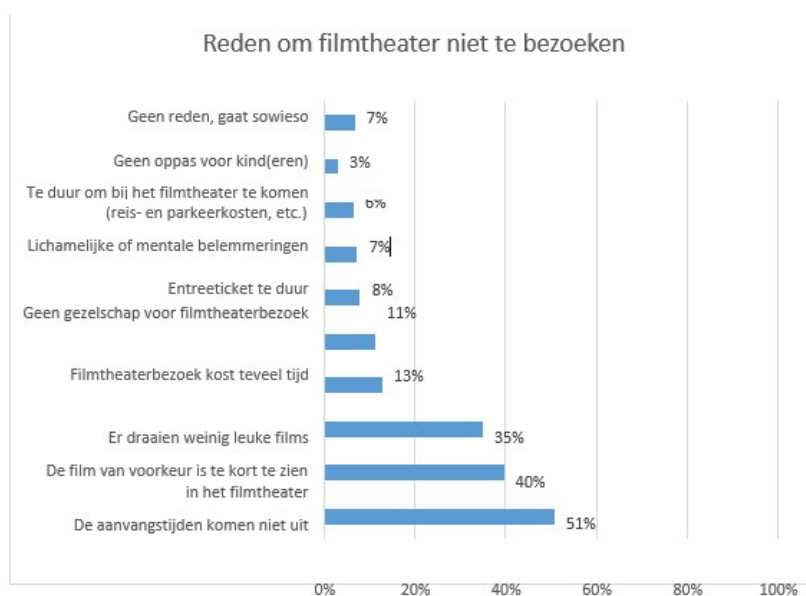
Although there is a high level of interest in Filmthuis, a large majority (88%) of the respondents were of the opinion that films are best seen in the (arthouse) cinema. In addition, the big screen and the good sound quality play an important role for more than three-quarters of respondents in choosing to visit an (arthouse) cinema.

Nevertheless, a large number of people do not go to the cinema owing to the following impediments.

[Reasons for not visiting the cinema; No reason, go anyway; No babysitter; Too expensive to get to the cinema (travelling and parking costs, etc.); Physical or mental impediments; Cinema tickets too expensive; No one to go with; Visiting the cinema takes too much time; Too few good films showing; The preferred film is not screening in the cinema for long enough; The starting times are not convenient.

Respondents classified by reasons that may play a role in deciding not to visit the (arthouse) cinema.

Nevertheless, a large number of people do not go to the cinema owing to the following impediments.



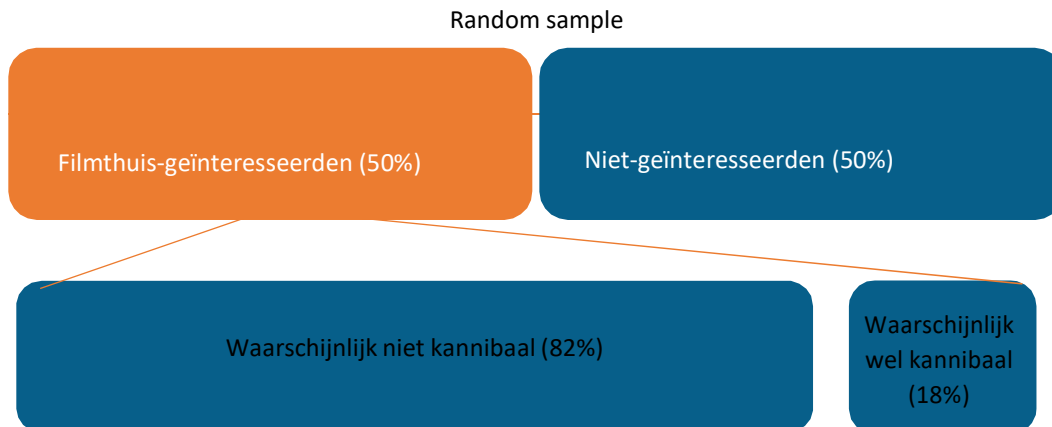
Filmthuis will have small negative impact on visits

When arthouse cinema visitors make use of Filmthuis while not facing any impediments that prevent them from actually visiting an arthouse cinema, their Filmthuis use does have a negative impact on their visits to the arthouse cinema. This is highly likely to be the case for 18% of those interested in Filmthuis; they did not state any impediments to visiting the arthouse cinema. The remaining 82% of those interested did state one or more impediments that could actually restrict their visits to arthouse cinemas (such as inconvenient starting times, a film not being screened for long enough, or because they can't get a babysitter). Because the majority stated that they have a preference for the (arthouse) cinema over watching at home, it is probable that this group of respondents will only use Filmthuis if these impediments apply. This means the risk of their use of Filmthuis limiting their visits to the arthouse cinema is small.



Filmthuis supplementary to arthouse cinemas

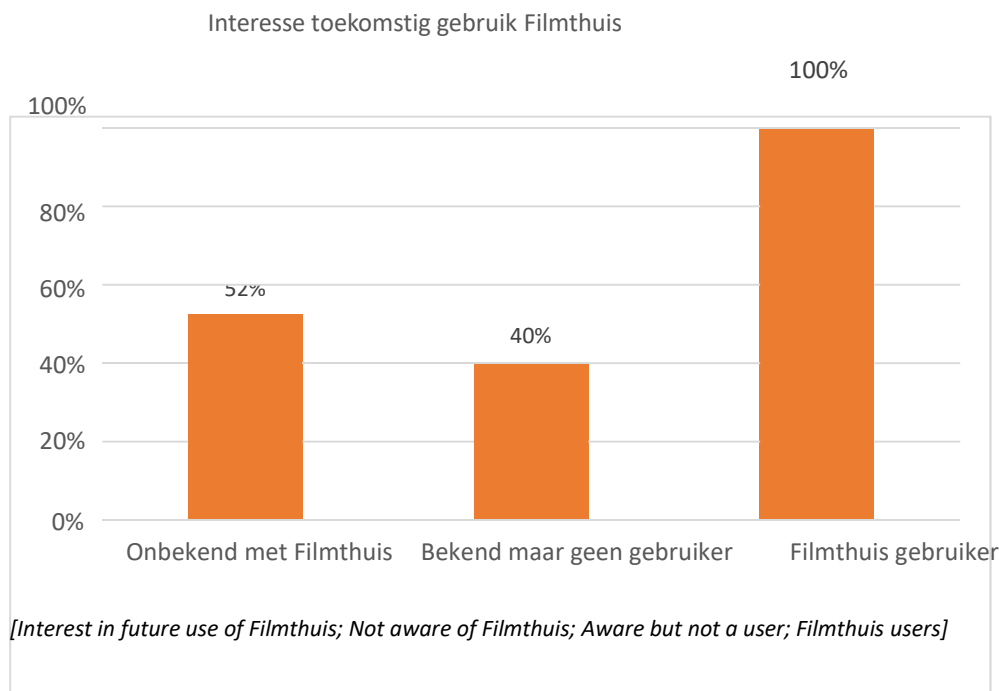
Filmthuis is largely supplementary to the arthouse cinemas and not so much a competitor. The vast majority of respondents experience visiting an arthouse cinema as preferable to watching films at home. Approximately half of the respondents and more than 80% of those interested in Filmthuis face impediments that prevent them from visiting the arthouse cinema. There is therefore a good chance that these people will not be able to see a film in an arthouse cinema. Filmthuis could be a good alternative to a cinema visit for these people. In addition, more than half of the people who miss a film in the arthouse cinema will still watch the film in another way, either illegally or through providers not affiliated to the arthouse cinemas. If these viewers were to watch films at home through Filmthuis, some of the income that would otherwise go to other providers would return to the arthouse cinemas.

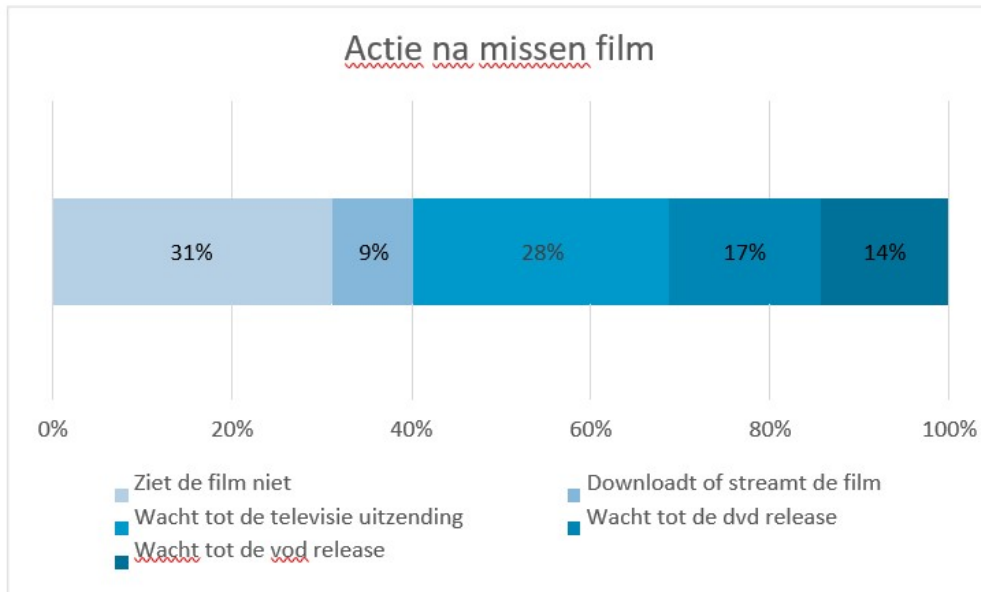


[Interested in Filmthuis (50%); Not interested (50%); Probably no negative impact (82%); Probably negative impact (18%).]

Percentage of respondents interested in making use of Filmthuis during the coming year, broken down according to familiarity with and current use of Filmthuis.]

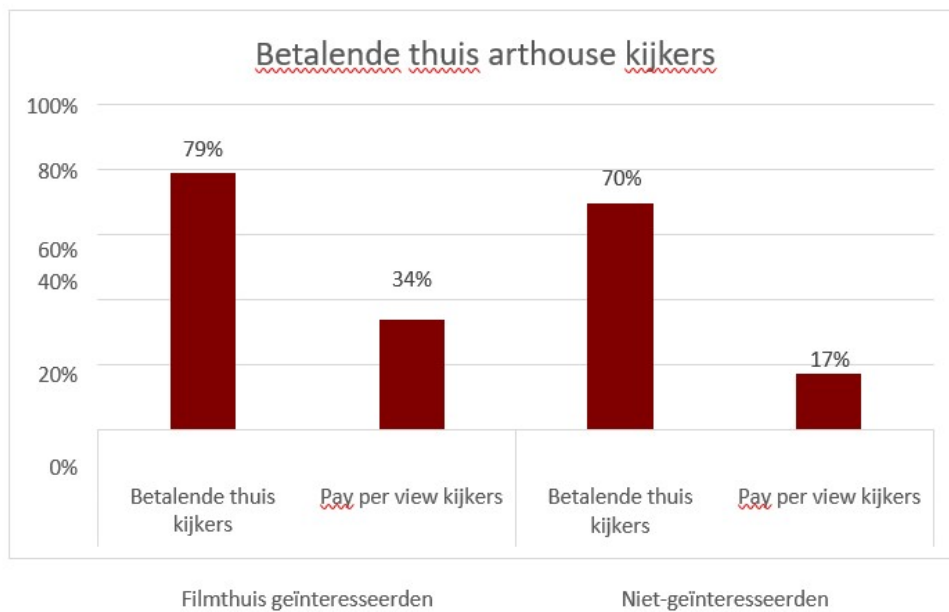
Interest in Filmthuis / Picl





[Action after missing a film; Don't watch the film; Wait for the television broadcast; Wait for the VOD release; Download or stream the film; Wait for the DVD release.

Respondents classified by what they normally do if they were not able to watch the film of their choice in an arthouse cinema].



[Paying home arthouse viewers; Paying home viewers; Pay-per-view viewers; interested in Filmthuis; Paying home arthouse viewers; Paying home viewers; Not interested.

Percentages of paying arthouse home viewers and pay-per-view viewers interested and not interested in Filmthuis.]

