



ANNUAL REPORT

2017-2018

MESSAGE FROM THE GOVERNMENT OF CANADA

The Canadian arts and culture sector is at the heart of our economy. It employs 650,000 people, with a GDP of 53.8 billion dollars. The government of Canada is committed to assisting creative industries and affiliated organizations. This is why, once again this year, we are proud to support the Quebec Film and Television Council (QFTC).

Since its creation, the QFTC has been striving to make Québec a major player in the audiovisual production field. It therefore both brings international productions to the province and favours the exportation of Québec's own film and television creations, thereby contributing to the dissemination of Québécois creativity and innovation throughout the world.

We wish to thank the QFTC and all of its members, who are committed to spreading Québécois know-how and the vitality of our economy. Enjoy the read!



Canada 



The Honourable **Mélanie Joly**
Minister of Canadian Heritage



The Honourable **Navdeep Bains**
Minister of Innovation, Science and
Economic Development

MESSAGE FROM THE QUÉBEC GOVERNMENT

The Québec government proudly supports the Quebec Film and Television Council (QFTC), which contributes to the international dissemination of the Québécois film and television production industry.

The arts and culture sector is a continually growing driving economic force, especially in the metropolitan region of Montréal. As a catalyst in a cutting-edge field, the QFTC attracts significant foreign investment and innovative projects in the animation, special effects and virtual reality sectors, among others.

We wish to take this opportunity to congratulate all the members of the audiovisual cluster for their work. Their concerted efforts to devise harmonious Québécois offerings in film and television facilitate the development and recognition of our know-how in the industry throughout the world.



Marie Monpetit

Minister of Culture and Communications

Minister responsible for the Protection and
Promotion of the French Language



Martin Coiteux

Minister of Municipal Affairs and Land
Occupancy

Minister of Public Security

Minister responsible for the Montréal region



Dominique Anglade

Deputy Premier

Minister of Economy, Science and Innovation

Minister responsible for the Digital Strategy



Stéphane Billette

Minister for Small and Medium Enterprises,
Regulatory Streamlining and Regional
Economic Development



VALÉRIE PLANTE

MESSAGE FROM THE MAYOR OF MONTRÉAL

Congratulations to the Quebec Film and Television Council for its work accomplished over the past year – as much on a local, national and international scale.

The continually growing number of audiovisual productions in the Montréal region ensures the dissemination of our vitality and cultural dynamism, in addition to making our metropolis a destination of choice for producers and visitors alike.

The Ville de Montréal salutes the remarkable work and sustained development of the Film and Television Council. Your efforts to attract major foreign productions to Montréal have led to enviable economic outcomes, in addition to enhancing our city's competitive advantages. We have offered you our full collaboration in accomplishing your mission, and plan on renewing it throughout the coming years.

We wish to encourage all the artisans in the audiovisual field, whose talent and expertise have shaped the excellent reputation and unique identity of Montréal. Our metropolis draws its strengths from the quality of its workforce, its diversity, its creative spirit and its openness to the world.

Thank you all, and best of luck!

Valérie Plante

Mayor of Montréal

President of the Communauté métropolitaine de Montréal

Montréal

Communauté métropolitaine
de Montréal



RÉGIS LABEAUME

MESSAGE FROM THE MAYOR OF QUÉBEC CITY

Congratulations on another activity-packed year, to the Quebec Film and Television Council (QFTC), an organization comprised of individuals who are committed to disseminating our talent, creativity and know-how on an international scale!

In reading the QFTC's Annual report, it's clear that Québec's film and television industry has the wind in its sails. From the promotion of our cities' distinctive attractions to the services offered to producers, the consultation strategy adopted by the Council bears fruit. I am particularly delighted about the capital city's numerous assets as a production centre, and I am convinced that this positioning will contribute to the development of structured projects in the near future.

As a city of innovation that honours the emerging workforce, Québec encourages the continuation of the QFTC's activities, to ensure the vitality of a promising industry, in the cultural, economical and societal spheres.

Régis Labeaume

Mayor of Québec City



LA **SODEC** ET LE **BCTQ**
ONT ÉTABLI AU FIL DES ANS
UNE RELATION D'AFFAIRES
QUI A CONTRIBUÉ À
SOUTENIR LA CROISSANCE
DE NOTRE INDUSTRIE.

BONNE
CONTINUATION
AU BCTQ!

f t i / **SODEC**
SODEC.GOUV.QC.CA

SODEC
Québec



**SYLVAIN
LAFRANCE**

MESSAGE FROM THE CHAIRMAN OF THE BOARD

We have just finished another year marking an increase in the shooting of foreign films and the best year (twice in a row) in the industry's history for visual effects. We are also progressively entering the worlds of virtual reality and augmented reality, and evaluating the potential of the Chinese market as a growth axis.

This positioning attests to the Council's dynamism and dedication in ensuring the growth of Montréal and the province of Québec in the worldwide audiovisual market.

But there are still significant challenges ahead of us. Do we occupy enough of the market? Are we competitive enough? Can we manage growth better, and ensure that both our infrastructures and workforce operate at optimal capacity?

One thing is certain: to increase our part of the market, we need to create collaborations, more than ever, between local players, and present ourselves as a built-in Québécois offering. This will be the challenge of the coming years, as we continuously work on putting into place the "winning conditions" of our commonalities and complicities.

The Board of Governors was less solicited this year, but in the coming year, we wish to review the composition and role of this important tool in validating our objectives.

I wish to thank the members of our Board of Directors, who support and structure our pursuits and initiatives. I also wish to commend the work of the Council's artisans, who passionately strive to surpass themselves.

We have strengths, skills, facilities and assets that are enviable to many competitors. Together, we can create all the conditions necessary for sustainable growth.

Sylvain Lafrance

Chairman of the Board



PIERRE
MOREAU

MESSAGE FROM THE CHIEF EXECUTIVE OFFICER

Once again, it's with great enthusiasm that I present the QFTC's Annual report for 2017-2018. Beyond the probing results that it contains, this report brings to light the achievement of objectives established in the triennial plan submitted in the spring of 2015. We recognize that our objectives are ambitious, and today, the Council has every reason to be proud of the work accomplished. I salute its exceptional team, which I greatly admire and respect.

Our commitment to Québec's audiovisual sector remains strong and pragmatic. Together, with our public and private partners, we contribute to Québec's evolution and international recognition as a centre for multi-screen productions. For instance, the visual effects ecosystem is now globally recognized as among the most creative and successful.

Production services

In 2017, direct spending for foreign productions shot in Québec reached 383 million dollars, a 29% increase compared to 2016. So far, this number is unparalleled in direct spending in Québec in terms of volume of foreign productions.

We had hoped to increase the volume of TV series. Here again, we can say mission accomplished, particularly with The Truth about the Harry Quebert Affair, The Bold Type and the last episodes of the Jack Ryan series. There are certainly many film projects to be added to this list, and for which the Council brilliantly played its role of facilitator for foreign productions. I should also mention the organization of the first "Line producing" mission, in which a foreign producer uses a Québécois production studio to complete its film or TV series project.

Audiovisual cluster

The cluster is a space for exchange and consultation, in which proposals for sectorial development, reflections on market growth support and the implementation of studies enabling measuring and better documenting development in the industry are addressed. In 2017, this division was very active, specifically with the "DOS (Strategic Orientations Document)" publication, presented to the industry on April 12, 2017, and the implementation of an ambitious sustainable development program of "green" practices carried out during shootings. Two studies were also launched in 2017: one measuring the direct and indirect economic outcomes of tax credits that are available for audiovisual production in Québec, and the other aiming to support the emergence of an ownership economy in the audiovisual and video games industry.

In the following pages, you'll find a detailed report and results from activities initiated by the QFTC, in addition to activities in which the Council has participated throughout the period of April 1, 2017 to March 31, 2018.

Since its creation, the Quebec Film and Television Council is pleased to be able to count on your support in the realization of its projects, and I wish to thank you very much.

Pierre Moreau

Chief executive officer

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THE QUEBEC FILM AND TELEVISION COUNCIL

The Quebec Film and Television Council (QFTC) was founded in 2006. Its primary objective is to contribute to the development and competitiveness of Québec, as a world-class centre for multi-screen productions.

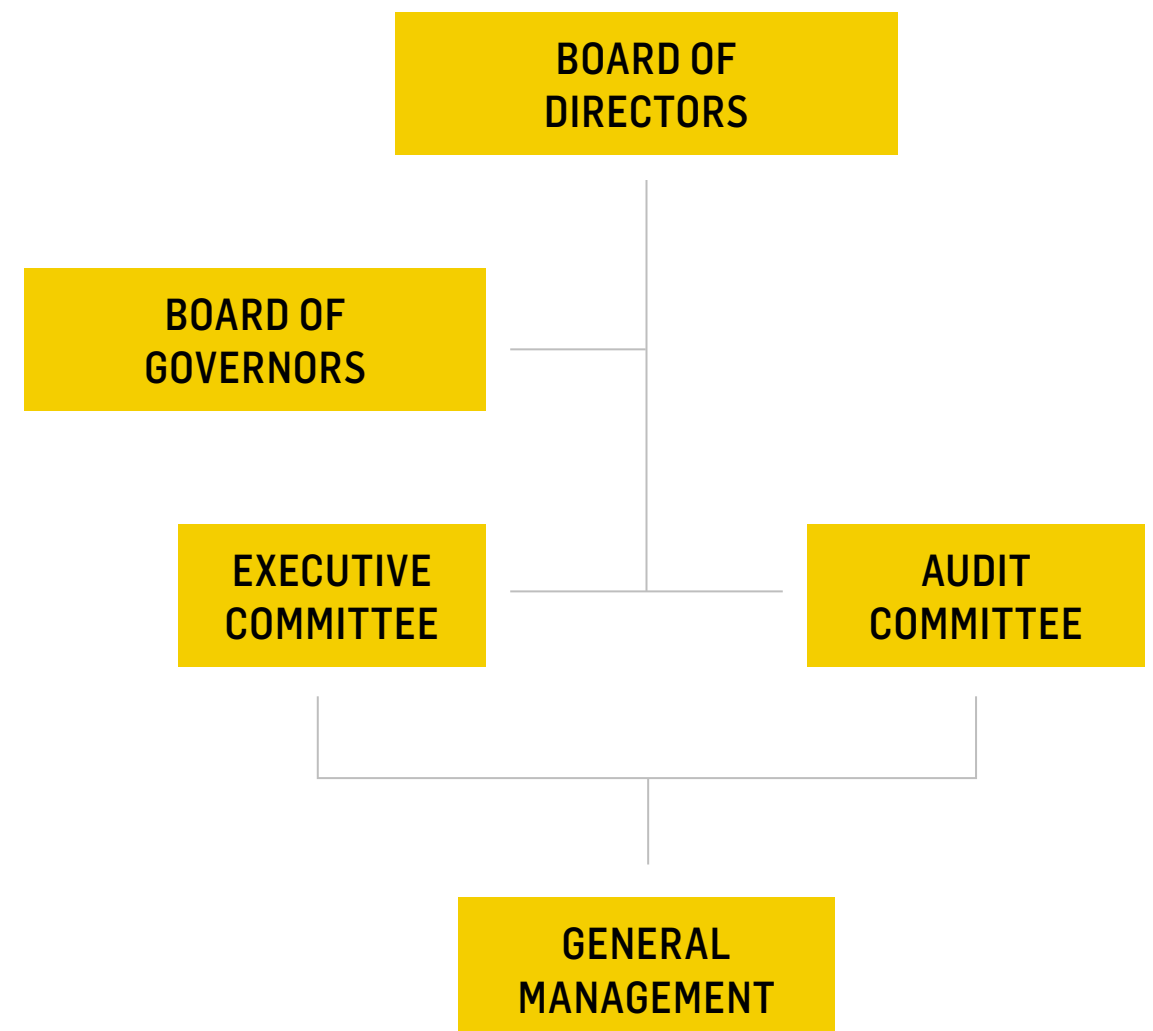
Today, this objective is centered around two main axes:

Production services – Illuminating the advantages of shooting in Québec: exceptional architectural diversity, qualified workforce, international-calibre infrastructures, cutting-edge professional setting, and finally, a visual effects ecosystem that is unique in the world.

Sectorial development – The Council also strives to be a space for exchange and consultation, in which concrete actions to support market growth are addressed. Sometimes it leads major pilot project studies and consultations in order to measure, orient and better document development in the industry.

Finally, the QFTC's members, their representatives on the Board of Directors, the members of the Board of Governors, and public and private partners all contribute to greater recognition of the Québécois audiovisual sector, both at home and abroad.

QFTC'S ORGANIZATIONAL CHART



BOARD OF DIRECTORS



SYLVAIN LAFRANCE

PRESIDENT

HEC Montréal

ÉMILIE DUSSAULT

VICE-PRESIDENT

MPC

MAURICE PRUD'HOMME

TREASURER

Fonds d'investissement de la culture
et des communications (FICC)
Fonds Capital Culture Québec (FCCQ)

DEAN CHENOY

SECRETARY

Miller Thomson

GILLES CHARLAND

Alliance québécoise des techniciens
de l'image et du son AQTIS

ANDREW LAPIERRE

Vidéo MTL

CHRISTIAN LEMAY

A.I.E.S.T. - Local 667

MARIE-CLAUDE POULIN

MCP Productions

MARTIN PICARD

Groupe TVA

LOUISE LANTAGNE/MONIQUE SIMARD

Société de développement
des entreprises culturelles (SODEC)

CATHERINE CHÉNIER

OBSERVER

Ville de Québec - Bureau des grands
événements

DANIEL BISSONNETTE

OBSERVER

Ville de Montréal - Bureau du cinéma et de la
télévision de Montréal (BCTM)

BOARD OF GOVERNORS

AN INITIATIVE OF THE CHAIRMAN OF THE BOARD OF DIRECTORS, SYLVAIN LAFRANCE

The Quebec Film and Television Council's Board of Governors was created on September 1, 2015. The objective of this Board, comprised of members who have been chosen from the industry's main leaders, is to steer the QFTC and ensure that its main development axes are aligned with industry challenges. The Board of Governors assumes an advisory role, and supports the QFTC in its interactions with decision-makers in the political, institutional and financial industries, in accordance with the nature and breadth of the Council's projects' growth objectives, feasibility and dissemination. Board members proudly represent Québec's audiovisual sector, both for its creative potential and its legitimate economic growth aspirations.

SAM BERLINER
**FIRST VP,
LEGAL AND
BUSINESS AFFAIRS**

Cineflix

LUC DERY
FOUNDER AND PRODUCER

Micro-scope

EMILIE DUSSAULT
CEO

MPC

FRANCIS FOX
STRATEGIC ADVISOR

Fasken Martineau

RENÉ GUIMOND
**VP, PUBLIC AFFAIRS AND
COMMUNICATIONS**

Cogeco inc.

CLAUDE JOLI-CŒUR
**GOVERNMENT FILM
COMMISSIONER AND
CHAIRPERSON**

ONF

MICHEL BISSONNETTE
FIRST VP, FRENCH SERVICES

Société Radio-Canada

SYLVIE LALANDE
CHAIRPERSON OF THE BOARD

Groupe TVA

SUZANNE LAMARRE
LAWYER

Therrien Couture

FRANÇOIS MACEROLA
CHAIRMAN OF THE BOARD

Frima

**MEMBER, BOARD OF
DIRECTORS**

QuébéComm

MAXIME REMILLARD
PRESIDENT AND CEO

Groupe V Médias

PIERRE RODRIGUE
**VP, COMMUNICATIONS,
MARKETING AND
INDUSTRY RELATIONS**

Bell Média

PATRICK ROY
PRESIDENT

Les Films Séville et Entertainment
One Canada

CHARLES SIROIS
CO-FOUNDER

Tandem Expansion

RICHARD SPEER
PRESIDENT AND FOUNDER

Groupe Attraction

QFTC'S TEAM



PIERRE MOREAU

Chief Executive Officer

ANNE FOSSIER

Executive Assistant

CHANELLE ROUTHIER

National Commissioner

ENDER NAVA

Financial Controller

ROMAIN PAULAIS

Director, Secretariat of the Audiovisual
Cluster and Public Financing

KARL BOULÉ

Director of Business Development

ARIANE DAGENAIS-PLANTE

Production Services Coordinator

PASCALE GUINDON

Production Services Coordinator

JENNIFER PRICE

Los Angeles Representative

PIERRE-OLIVIER FORTIN

Project Manager



THE AUDIOVISUAL INDUSTRY

2016-2017 FILM AND TELEVISION PRODUCTION IN QUÉBEC

Television production

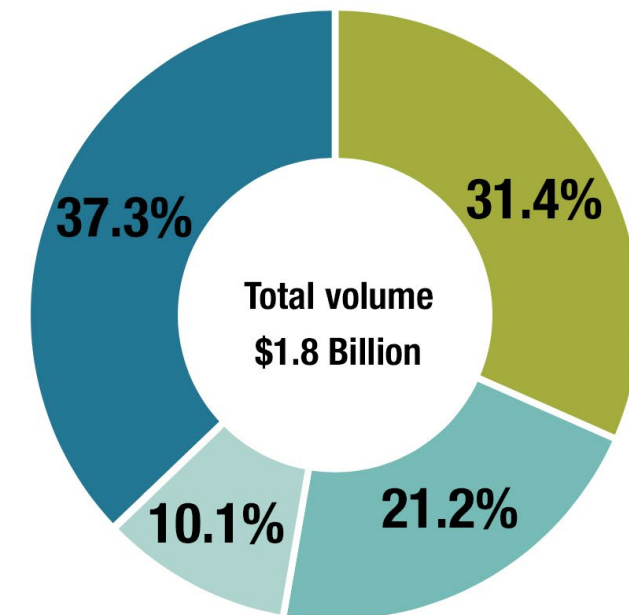
Volume: \$665 M ↑ 0.6%

Number: 494 ↑ 2.1%

Foreign production and production services

Volume: \$551 M ↑ 38.5%

Number: 74 ↓ -11.9%



Film production

Volume: \$178 M ↑ 3.4%

Number: 56 ↑ 12.0%

Internal production

Volume: \$371 M ↑ 9.4%

Incl.: General TV ↑ 20.1%
\$207 M

Incl.: TV S-P-VSD-TAC¹ ↓ -1.5%
165 M\$

Profile of the audiovisual industry in Québec in 2017, Observatory of Culture and Communications of Québec (OCCQ)

QFTC'S PROJECTS

- 1. HOSTING AND PROMOTIONAL ACTIVITIES**
- 2. VISUAL EFFECTS**
- 3. FISCAL INCENTIVES**
- 4. INTELLECTUAL PROPERTY**
- 5. GREEN FILM SHOOTING**
- 6. SOUND RECORDING**
- 7. COMMERCIALIZATION**
- 8. CO-PRODUCTIONS**
- 9. INNOVATION**
- 10. YOUTH PRODUCTIONS**

「1.」

HOSTING AND PROMOTIONAL ACTIVITIES

FOREIGN FILM SHOOTING

With 23 productions and 653 days of shooting, 2017 marked a record year for direct spending in Québec for foreign productions. Compared to 2016, there has been a remarkable increase of 29%. The QFTC continues its production diversification efforts, accommodating three big TV series this year.

This record serves to positively pave the way for attaining the growth objectives set by the industry over the next five years. In a stable economic context, the QFTC aims to maintain annual growth of approximately 20-30%, in order to generate annual revenues close to \$600 M by 2022.

As described in the following pages, the Council continually updates fiscal incentives in different ways, to encourage producers to shoot and return to shoot films in Québec, in an effort to attract greater production diversity in the region and thereby create a stable volume of business that is profitable for our members.

\$ 383 M

DIRECT SPENDING
IN QUÉBEC

5,946

JOBS CREATED OR
MAINTAINED

653

DAYS OF SHOOTING

23

PRODUCTIONS



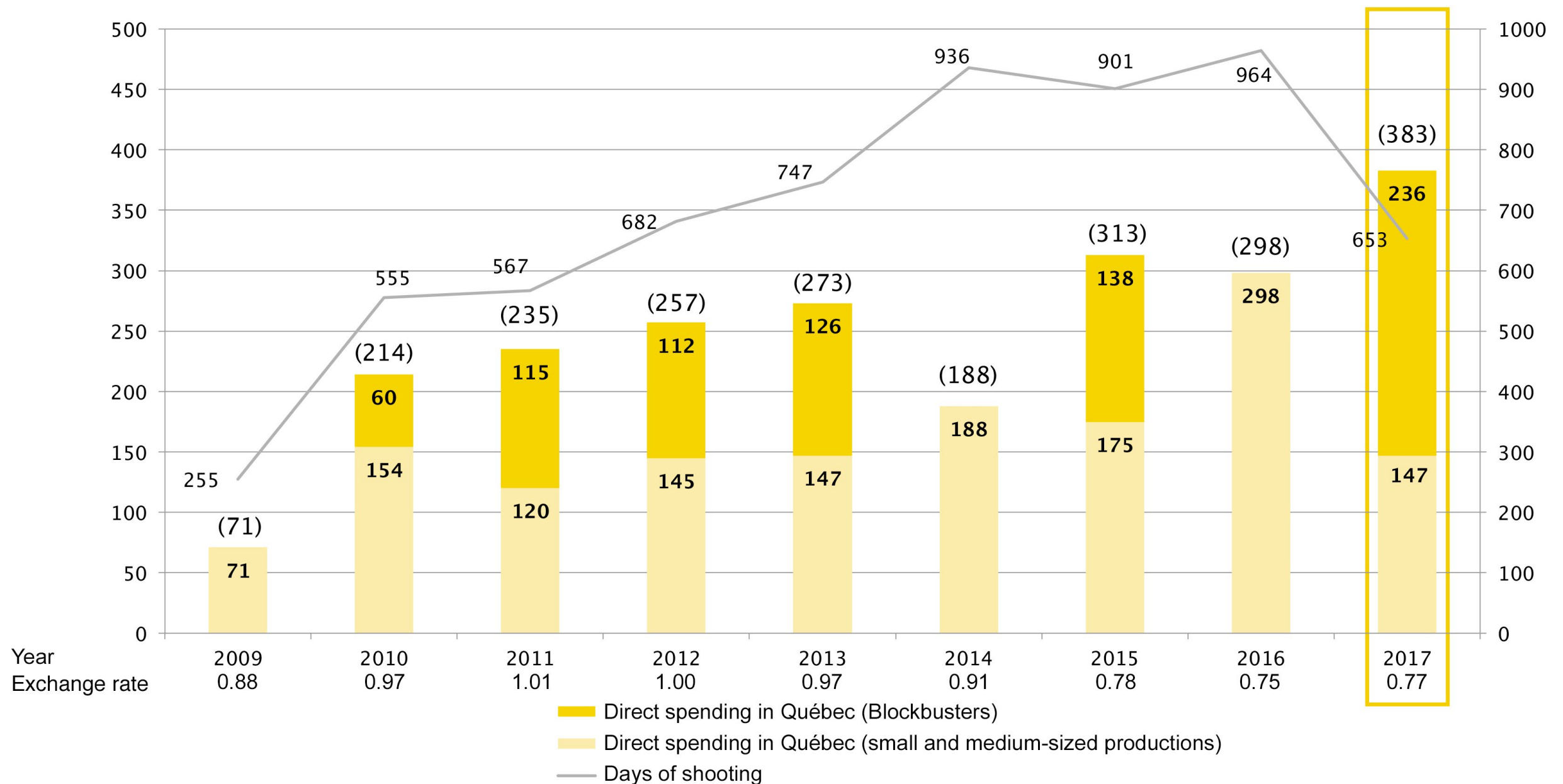
“ Québec has become an important filming destination for us, and shows like *The Bold Type* become a success because of competitive incentives, great crews, and access to a variety of vendors and production facilities.

We are looking forward to filming more seasons of this show in a province that is so supportive of the film and television industry.”

— **PAMELA GRANT**, Vice President, Production, Universal Television

FOREIGN PRODUCTION VOLUME

DIRECT ECONOMIC SPENDING IN QUÉBEC AND DAYS OF SHOOTING



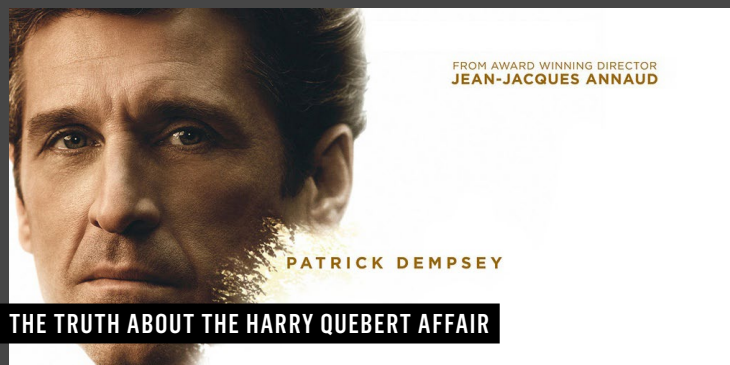
FOREIGN FILM SHOOTING



X-MEN



JACK RYAN



THE TRUTH ABOUT THE HARRY QUEBERT AFFAIR

PRODUCTIONS FILMED IN QUÉBEC

NAME OF PRODUCTION	PRODUCTION STUDIO	DIRECTOR
<i>The Looming Tower</i>	Legendary Television / Hulu	Alex Gibney
<i>The Amazing Race Canada</i>	Insight TV	Rob Brunner
<i>Aquaslash</i>	Handel Productions / Blackpills	Renaud Gauthier
<i>The Bold Type (Season 1)</i>	Universal Television Pictures	Victor Nelli Jr., Tara Nicole Weyr, Anna
<i>Canadian Labor Centre</i>	Handel Productions	-
<i>Chaos Walking</i>	Lionsgate	Doug Liman
<i>Find your Wild</i>	Velocity Creatives	-
<i>Flarsky</i>	Good Universe	Jonathan Levine
<i>The Gift</i>	1976 Productions	Claude Lalonde
<i>Here on Earth</i>	La Corriente del Golfo	Everardo Gout, Alonso Ruizpalacios Mariana Chenillo, Gael García Bernal Adrian Grunberg
<i>Jack Ryan</i>	Paramount / Amazon	Patricia Riggen, Daniel Sackheim Carlton Cuse, Morten Tyldum
<i>Justice Dot Net</i>	Iris Productions, Lyla Films, Ripple World Pictures	Pol Cruchten
<i>Lemonade</i>	Périphéria Productions Inc.	Ioana Uricaru
<i>Les aventures de l'ours G</i>	Studio Hari et Antoine Rodelet et Josselin Charrier	Victor Moulin
<i>MMM : Monsieur Misterman</i>	Magnificat Films	Antoine Charreyron
<i>Mooom</i>	Together Media	Andy King
<i>On the Basis of Sex</i>	Participant Media	Mimi Leder
<i>Pauvre Georges</i>	Forum Films, Iris Films, Mon Voisin Productions	Claire Devers
<i>Life Sentence</i>	In good Company	Lee Toland Krieger
<i>The Truth about the Harry Quebert Affair</i>	MGM	Jean-Jacques Annaud
<i>Waco : Madman or Messiah</i>	Raw TV	Christopher Spencer
<i>X-Men : Dark Phoenix</i>	Fox	Simon Kinberg
<i>Zoe (1:0)</i>	Scott Free Productions	Drake Doremus

INTERNATIONAL ACTIVITIES

Each year, National Commissioner, Chanelle Routhier; and L.A. Representative, Jennifer Price, of the QFTC Coordination Team, participate in over a dozen national and international markets and conferences. These representation activities enable the promotion of Québec as a centre for world-class multi-screen production, and the development of business connections with the most influential leaders in the international film and television industry.

When attending such big events, the QFTC promotes all areas of expertise available in Québec, emphasizes the talent of professionals and artisans from here, and favours meetings between Québécois and international producers.

In 2017-2018, meetings were organized with over 200 decision-makers in the production, co-production, post-production, financing, animation, sound recording, VR/AR and other segments of the audiovisual industry.

The QFTC also benefits from these trips to thank producers, discuss their shooting experiences and forge enduring business relationships with producers who have shot in Québec in recent years.



On November 6, 2017, a networking event organized by the QFTC in Los Angeles (as part of the AFM) enabled nearly 200 leaders in the production and financing sectors to exchange with business leaders from the Québécois audiovisual industry.

The QFTC graciously thanks the partners who enabled this event to take place:

Front row: Globalex and the Québec delegation in Los Angeles (DQLA)

HOSTING ACTIVITIES

5 **14** **40+**
FAM **LOCATION-** **VISITS FROM**
TOURS **SCOUTING** **PRODUCERS**
VISITS

PRODUCTION SERVICES

Since its creation in 2006, the QFTC plays the role of single service point for foreign producers wanting to shoot in Québec. In collaboration with municipal and regional offices, it ensures the promotion of Québec's audiovisual industry on an international scale. The team is involved in all steps of the process for each project, and fulfills its role as facilitator from the first location-scouting visits until the end of post-production. In 2017-2018, the QFTC jumped from twelve to fourteen location-scouting visits by foreign production teams, and also organized one more Fam tour than the previous year.

Over 40 producers and decision-makers were met with between April 2017 and March 2018.

5 FAMILIARIZATION TOURS TO PROMOTE QUÉBEC

SPRING TOUR

MAY 2017

In collaboration with Lowik Media, the QFTC benefitted from the Hot Docs Festival as an opportunity to target European co-producers and invite them to discover Québécois offerings. On May 10, 2017, the six producers therefore met with about a dozen member companies or Prestige partners of the QFTC in Montréal.

CHINESE TOUR

MAY 2017

For the first time, from May 22 to 29, 2017, the QFTC organized a Fam tour comprised of nine members of an exclusively Chinese delegation, in the context of The Broker series project. Guests therefore had the opportunity to meet the Mayor of Montréal and scout out shooting locations in Montréal and the Laurentians.

In response to excellent feedback from participants, the QFTC plans to organize a 2nd Fam tour with Chinese producers in September of 2018, in the context of a partnership with the Canada China International Film Festival.



The InLee Media delegation, in the company of Mayor of Montréal, Denis Coderre and Yan Éthier of the MFTC.

VISUAL EFFECTS TOUR

SEPTEMBER 2017

For the 3rd consecutive year, the QFTC organized a Fam tour for five VFX producers and supervisors from major American studios, such as Amazon Studios, Legendary Pictures and Industrial Light & Magic (ILM).

Divided into three sections, the tour enabled invited experts to become acquainted with the depth of Québécois talent in the visual effects and animation realms. Approximately ten representatives from Québécois companies had the opportunity to present their services and expertise to producers in the context of individual meetings that were organized specifically for members of the QFTC.

"I want to thank you for introducing us to so many wonderful, talented people. Hopefully, we can be on our way back to you to start preparations."

William W. Wilson III, Senior VP, Production

Producers also participated in a panel at effects MTL, in which they advised on work sharing between service companies for films and/or televised series.

ANIMATION TOUR

OCTOBER 2017

On October 3, in the context of Cartoon Connection 2017, the QFTC's productions services team organized an Animation Fam tour, in the company of Ollie Green, First VP of the American channel, Adult Swim; and Émilie Caillon, Producer and Writer for the French company, Edgar Pow Wow.

On the agenda: meetings with Québécois producers, visits of animation studios and Montréal and Québec service companies, in addition to meetings with the Bureau des grands événements de la Ville de Québec and Québec International.

HOSTING ACTIVITIES

(CONTINUATION)

WINTER TOUR

JANUARY 2018

On January 30, 31 and February 1, 2018, the QFTC held its 2nd winter Fam tour.

With the collaboration of regional offices in Québec City, Montréal and the Laurentians, and with the Council's Prestige partners, four producers from Los Angeles and Atlanta participated in this highly successful Fam tour.

Everyone expressed their desire to return and work on projects in Québec!

"Dear All,

I wanted to thank you for the wonderful Fam Tour Week you put together for us. It was a perfect week in all ways.

I learned much about Quebec and am incredibly enthusiastic about bringing a film to the province. [...] I look forward to a mutually beneficial relationship and many many more trips to Quebec!"

Deborah Moore, President of Production, IPE Films



The 4 winter Fam tour producers (Alexandre Coscas, Michael Swanson, Mark Katchur and Deborah Moore) in the company of Channele Routhier (QFTC), Yan Éthier (MFTC) and Mélanie Saumure (MFTC) at the chalet du Mont-Royal.

ACTIVITIES

"QUÉBEC - A MOVIE-MAKING CITY"

From March 15 to 16, the Bureau des grands événements de la Ville de Québec and the QFTC organized the "Québec - A Movie-making City" activity for eight executive producers or local location-scouting directors.

Over two days, participants had the opportunity to discover or rediscover the shooting locations that the capital city offers for local and international productions. They also met with technicians, producers and service providers in the region.



Upper row: Vito Balenzano, Michel David, Benoit Mathieu, Michèle St-Arnaud, Geneviève Doré and Karl Boulé

Lower row: Aïcha Raïhani and Lise Grégoire

NATIONAL DIGITAL LIBRARY

THE QFTC'S NATIONAL DIGITAL LIBRARY:
AN IMPRESSIVE IMAGE DATABASE FOR THE INDUSTRY

6,830

SHOOTING LOCATIONS

138,238

PHOTOS

For the past ten years, the QFTC's National digital photo library has been the reference for foreign and Canadian productions. Containing nearly 140,000 photos today, it evokes the richness and diversity of the Québécois region for major international production companies.

In 2017-2018, thanks to collaboration with all of Québec's municipal and regional offices, 20,941 new photos, 633 new locations, and 200 new albums were added.

The digital library offers a Web interface that is accessible to users, who can save, file and modify the location-shooting albums they create, at all times and in accordance with their level of access.

DIGITAL LIBRARY >



TWO LARGE LOCATION SCOUTINGS IN 2017

LARGE LOCATION SCOUTING OF QUÉBEC'S CAPITAL CITY

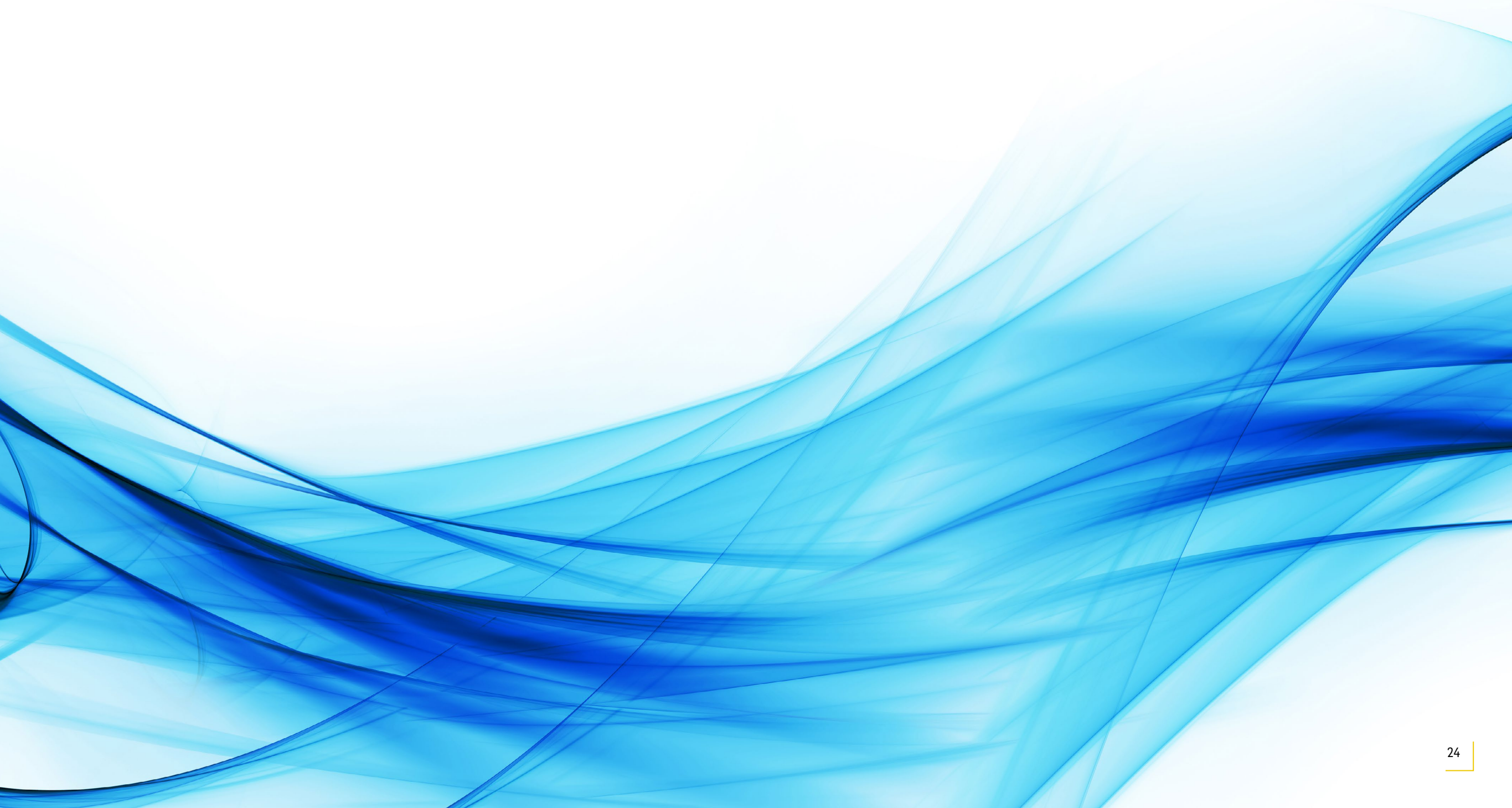
In collaboration with the Bureau des grands événements de la Ville de Québec, the QFTC organized a shooting location scout of the Québec city area. Managers of both Bureaus reached an agreement that Charlevoix would be this year's region to further promote in order to widen our offering to foreign producers.

The 25 new locations proposed were added to the digital library, thereby solidifying Québec City's position as a major production centre in the province.

LARGE LOCATION SCOUTING IN MONTRÉAL

Thanks to its collaboration with the Montréal Film and TV Commission (MFTC), the QFTC also organized its annual location-scouting project on the North and South Shores of Ville de Montréal. An impressive number of accessible shooting locations in the digital library helps position the Greater Montréal as a high-calibre film and television production centre.

「2.」 VISUAL EFFECTS



VISUAL EFFECTS PRODUCED IN QUÉBEC

\$ 262 M

CONTRACT VOLUME

157

LOCAL AND FOREIGN
PRODUCTIONS

In 2017, **55 local productions** and **102 foreign productions** entrusted Québécois businesses with the creation of their visual effects, representing a volume of **\$262 million**. This translates into **18,400 plans** for prestigious productions, such as *Blade Runner 2049* (Oscar winner for Best Visual Effects in March of 2018), *Star Wars: The Last Jedi*, *Valérian et la Cité des mille planètes*, and finally, *Hochelaga, terre des âmes*.

The sector has experienced a yearly **growth rate of 27%** between 2009 and 2016. This year confirms the ecosystem's solidity, by maintaining an almost-record volume of contracts. This ecosystem is classified among the most creative and successful in the world, offering numerous opportunities to over 2,600 Québécois professionals.

COMPLETE LIST OF PROJECTS >



BLADE RUNNER 2049

Courtesy of Framestore



PADDINGTON 2

Courtesy of Framestore



LEGION

Courtesy of Folks FX



GAME OF THRONES

Courtesy of Rodeo FX

A DIGITAL CREATIVITY EDUCATION HUB

In autumn of 2016, the Ministre de l'Enseignement supérieur launched an initiative aiming to develop a hub for excellence in digital arts and creativity. Upon her request, a pilot committee was implemented in order to propose a structured project and work plan that would develop a strong synergy between higher education and business players in the areas of initial and continuing education, research, innovation and technology transfer. In this regard, the ministère invited the QFTC to become part of the pilot committee and to pursue its collaboration in the implementation of future initiatives.

An announcement from the provincial government confirming the creation of the hub is expected in the coming weeks.

EFFECTS MTL

For a third consecutive year, the QFTC was a major partner of the effects MTL event. Held in September of 2017, this 3rd edition brought together nearly 1,100 participants. The Director of the Secretariat of the Audiovisual Cluster gave a speech at the event opening. A kiosk in the colours of VFX-Montréal also enabled many students to discover the website.

Randy Starr, Gretchen Libby, Nancy St. John, William W. Wilson III and Benoît Touchette



In the context of the Visual effects Fam tour, producers invited by the QFTC participated in a panel on the theme “Discussion 360° on the visual effects industry,” moderated by Benoît Touchette, Director of Visual Effects for MELS. Among other things, they shared their advice on how to maximize production quality, the best methods to achieve a collaborative spirit between different teams, the best practices to adopt, and the obstacles to circumvent when creating visual effects for an American blockbuster.

ATTRACTING TALENT

Once again this year, the QFTC represented the industry through the federal government’s C-14 Immigration Program, dedicated to temporary foreign workers in the audiovisual sector.

The QFTC brought together a coalition of 15 studios to make recommendations to Immigration, Refugees and Citizenship Canada.

The Council also led a consultation of its members on the reform of Employment and Social Development Canada’s federal global talent program. Its recommendations specifically led to a reduction in the number of years of experience required and to a broadening of eligible positions and skills.

Study by Montréal International on specializations of ICT employees in Greater Montréal

As a representative of the visual effects sector, the QFTC was invited to be part of the pilot committee for this study, with the following two main objectives:

- **To document the depth of the industry and the breadth of specializations on the job market**
- **To create a list and description of the main professions and specializations**

The QFTC also decided to become a financial partner for the study.

THE VFX-MONTRÉAL WEBSITE

32,500

UNIQUE VISITS (+32%)

186,000

PAGE VIEWS (+48%)

Bearing in mind that the VFX-MONTRÉAL site, an initiative of the QFTC and the VFX Committee, was launched with the goal of reinforcing Québec's and the Ville de Montréal's positions as international production centres for visual effects, VFX-MONTRÉAL quickly became a reference of choice for experts in the industry. With the addition of five new visual effects studios to the site in 2017, VFX-MONTRÉAL is now comprised of 30 Québécois visual effects, animation and virtual reality studios.

2,670

APPLICATIONS

VFX-MONTREAL.COM >



SHADOWHUNTERS

Courtesy of Folks FX



BLADE RUNNER 2049

Courtesy of Rodeo FX



BLADE RUNNER 2049

Courtesy of Framestore

「3.」 FISCAL INCENTIVES

STRATEGIC MONITORING

The fiscal incentives question is of central concern in all aspects of our industry. Fiscal incentives, in fact, represent essential support to the creativity of Québécois writers, directors and producers, but also serve to leverage the indispensable economic development that has enabled Québec to benefit from structured foreign investment, which has created a wealth of long-term employment that is resolutely a product of the 21st century economy.

The QFTC's strategic monitoring consists of ensuring that our incentives are competitive and updated – certainly with regards to the development of international markets – but also of ensuring that they reflect our aspirations and desire to proudly display the “Québec content” signature in big markets.

With regards to these subjects of interest, the Council works closely with the SODEC and ministère des Finances team, with which it has developed a professional, interactive and pragmatic relationship.

20%

ALL EXPENSES

16%

VISUAL EFFECTS, ANIMATION AND SHOOTING WITH A CHROMA-KEY SCREEN
BONUS

16%

CANADIAN WORKFORCE

RECURRENCE/VOLUME INCENTIVE + REGIONAL CREDITS

In 2017, the QFTC undertook steps to implement advantages on tax credits for audiovisual production services that are based on consistent business volume and recurrent investments. A collaboration with SODEC in addressing the ministère des Finances is anticipated for 2018.

The QFTC is also working on modifying the tax credit for production services for regional shootings, so that it is allocated based on cumulative regional expenses, rather than solely on the geographic location of production offices.

Beforehand, the Council consulted Nancy Florence Savard, President of the Table de concertation en cinéma de la Ville de Québec, Hélène Messier, CEO of AQPM, and all regional offices in the film industry.

PROFILE OF THE AUDIOVISUAL INDUSTRY

The QFTC followed the AQPM's initiative to carry out a study of overall on-screen production in Québec. A range of statistics on the Québécois audiovisual industry was compiled in order to facilitate a comparison between Québécois and Canadian trends.

Created by the Observatoire de la culture et de la communication du Québec (OCCQ), the “Profil de l'industrie audiovisuelle au Québec en 2016” publication also involved the following partners: the Association des réalisateurs et réalisatrices du Québec (ARRQ), Alliance québécoise des techniciens de l'image et du son (AQTIS), Directors Guild of Canada – Quebec District Council (DGC), Société des auteurs de radio, télévision et cinéma (SARTEC), and Union des artistes (UDA).

The document was published on August 27, 2017.

THE AUDIOVISUAL INDUSTRY PROFILE IN QUÉBEC IN 2016

4. INTELLECTUAL PROPERTY

Some segments of the Québécois film and video games industry are first and foremost service economies. Therefore, intellectual property in these sectors is currently held outside of Québec.

Given the context, adaptation of the fiscal environment is a main objective, in order to favour the emergence of businesses holding intellectual property in the industry.

The QFTC therefore mandated the firm PWC to carry out a study with the following objectives:

- **Short term:** To implement a fiscal incentive, beyond the tax credits currently available for audiovisual and video games production, in order to maintain or bring back intellectual property to Québec
- **Medium term:** To favour the development of a sales and international development culture within Québécois businesses

The study was completed in May of 2018 and presented to the ministère de la Culture et des Communications and ministère des Finances. Financial partners included Alliance Numérique, Ville de Montréal, Québec City and law firm Smart & Biggar.

5. GREEN FILM SHOOTINGS

The aim of the Green film shooting project is to demonstrate how eco-friendly measures can translate into increased competitiveness and measurable savings for producers.

For the past few years, media producers have shown interest in the establishment of ecologically responsible practices.

The QFTC's project proposes a two-step procedure: firstly, the preparation of an inventory of greenhouse gas emissions generated by film shootings carried out in Québec, and secondly, the development of an action plan over five years to evaluate our progress in working towards carbon-neutral practices, through ecologically responsible gestures and compensating for emissions that can't be reduced.

This initiative is carried out in collaboration with the ministère du Développement durable, de l'Environnement et de la Lutte contre les changements climatiques and Recyc-Québec. We also consulted Écotech Cleantech Cluster. The greenhouse gas emissions inventory started in 2017 and will continue until the summer of 2018.



6. SOUND RECORDING

Since 2016, the QFTC has been collaborating with other industry players on developing an ecosystem in Montréal for music recording that is destined for audiovisual production.

The Plan économique du Québec, published in March of 2017, carried on this work via the announcement of the implementation of a pilot project aiming to evaluate the potential of the market – a project that would create jobs for musicians and value the work of Québécois composers.

Since the publication of the Plan économique, the QFTC has supported the SODEC in the implementation of an analysis protocol that is smooth, efficient and accurate.

In April of 2018, the program was finalized by the SODEC, and it is currently being implemented.



7. COMMERCIALIZATION

In 2016, the QFTC produced a study entitled, “Mise en place d’une structure de soutien à la commercialisation et à l’exportation de productions télévisuelles québécoises : Contexte, enjeux et pistes stratégiques.” The study findings were shared with the Board of Directors of the QFTC, as well as with some institutions and organizations that aim to position Québec on the international scene by capitalizing on the exportation of original world-class calibre content.

Following this study, a joint committee (comprised of the AQPM, CMF and SODEC) was formed in 2017. The committee developed the “producer’s suitcase” concept, which aims to identify the necessary tools enabling producers to undertake international processes that are efficient and compliant with current practices.

Some of the specific tools include general descriptions, synopses, character bibles, show summaries, translation of some texts, and other specifications enabling a complete analysis of the project.

8. CO-PRODUCTIONS

Creation of a private financing guide

For co-productions created by private partners utilizing the available fiscal incentives in their respective regions, and whose financing involves venture capital, if necessary, private financing is one of the cornerstones for project development. It’s therefore important to facilitate this type of partnership, in addition to access to private financing.

The QFTC has therefore created a guide providing an inventory of private financing available for co-production projects. The guide will be available in the summer of 2018.

The Council also mandated RCGT to create a European co-production guide, in which the conditions and rules and regulations of each country are stipulated. Destined for foreign producers, the guide was distributed at the Berlinale, MIPTV and Marché du Film de Cannes.

9. INNOVATION

VISIT FROM TED GAGLIANO

The QFTC had the pleasure of inviting Ted Gagliano, President of Feature Post-Production for Twentieth Century Fox, to Montréal, from May 23 to 25, 2017. During his visit, an official breakfast was organized with the Mayor of Montréal and Prestige partners of the QFTC.

As an expert in virtual and augmented reality, Mr. Gagliano was invited by the Council to give an exclusive lecture for QFTC partners and members. It took place in Montréal, at the Phi Centre, on May 25, and attracted approximately sixty participants. Mr. Gagliano addressed the challenges related to the numerous possibilities that this new media offers creators and directors. He also visited Québécois VR/AR studios and met with Montréal scientists who are specialized in the field.



SXSW

In light of its goal to implement a Québécois competitiveness hub for virtual and augmented reality, in collaboration with the ministère de l'Économie, de la Science et de l'Innovation, the QFTC participated in the organization and recruitment of a delegation of Québécois businesses at South by Southwest Conferences & Festivals 2018 (SXSW), which took place from March 9 to 18.

65 Businesses participated in this exceptional opportunity for visibility, which enabled Québec to distinguish itself on the international scene as a region with strong potential for innovation and creativity. Over 300 formal meetings took place at the event.

The QFTC therefore had the opportunity to meet the major international players in new technologies, while conveying the vibrancy and strengths of Québécois entrepreneurship. Coordinated by the Council for the event, a kiosk was accessible to Québécois companies participating in the mission, so they could showcase technologies developed in Québec.

The delegation was comprised of businesses representing the following sectors: virtual reality, augmented reality, artificial intelligence, big data and multimedia experiences.

Five episodes of a Web series promoting Québécois entrepreneurs were also shared on social media. These videos, shot on-site in collaboration with the Québec government, BLVD, Havas Montréal and National Bank, have already been viewed over 500,000 times.



DEVELOPMENT OF THE CHINESE MARKET

On May 29, 2017, at the Phi Centre, over 20 QFTC members representing the VR/AR industry requested that the Council develop connections and business relationships in the Chinese market, where the sector is experiencing rapid growth.

In response to this request, the QFTC participated in the Québec Premier's Trade Mission to China in January of 2018, and in the Minister of Canadian Heritage's Creative Industries Mission, in April of 2018.

The objectives of participating in these missions were to create new business relationships, develop an understanding of the business protocol specific to the Chinese market, and finally, to favour business development in the innovation sector (VR/AR).

Following these two missions, an action plan was devised and submitted to the QFTC's Board of Directors, on June 12, 2018. Application of the plan is contingent upon obtaining ad hoc financing that is dedicated to developing the Chinese market.



10. YOUTH PRODUCTIONS

In June of 2017, under the presidency of Lucie Veillet of Téléfiction production company, the QFTC created a committee dedicated to the youth sector.

The committee's objective was to present a series of recommendations that would be used to reach a consensus on the following question: What measures should be taken to ensure that our children continue to watch Québécois content that they can relate to?

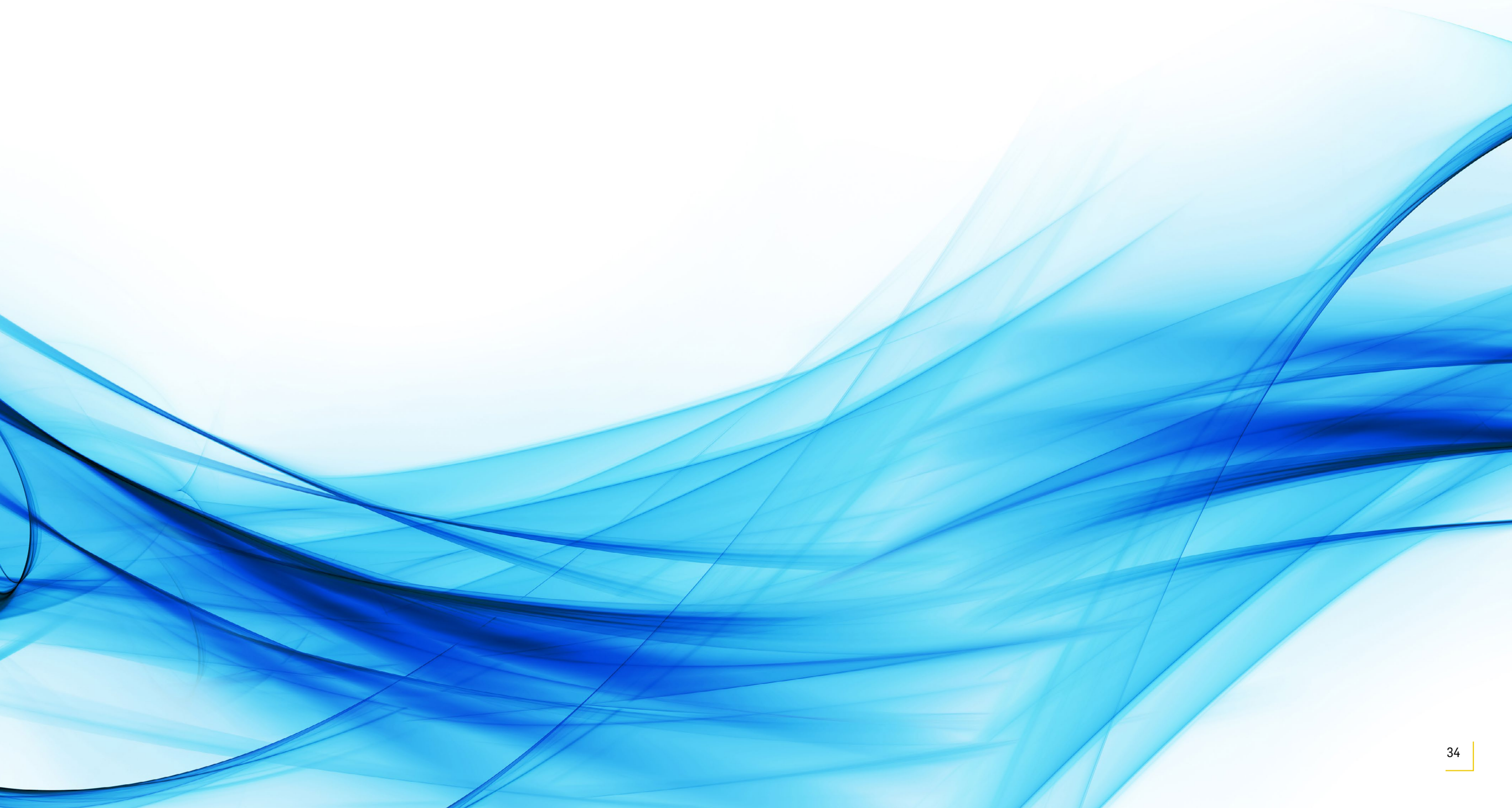
Many challenges were identified, particularly pertaining to format, intellectual property and financing.

To begin with, an inventory was drawn up to analyze the evolution of youth content financing over the past few years.

TO CONSULT THE DOCUMENT



「11.」 COMMUNICATIONS



PROMOTIONAL TOOLS

48,500

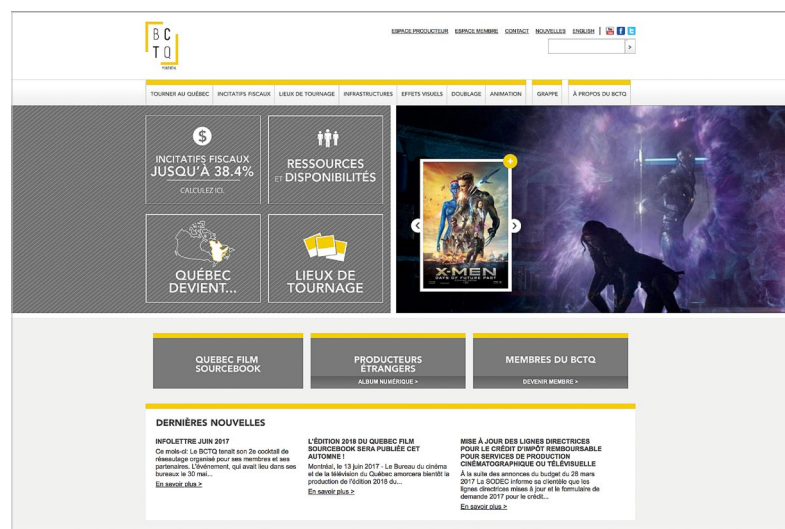
UNIQUE VISITORS

QFTC WEBSITE

Thanks to its very rich and informative content, the QFTC website is consulted more and more by its members and by producers seeking precise information. The website consists of sections specifically devoted to foreign producers, members, and assistance with calculating tax credits.

In 2016, the QFTC created an animated banner on its home page, in order to offer visibility to its new business partners. **Between April of 2017 and March of 2018, the QFTC website received over 73,500 single visits, and 188,000 page views.**

QFTC.CA >

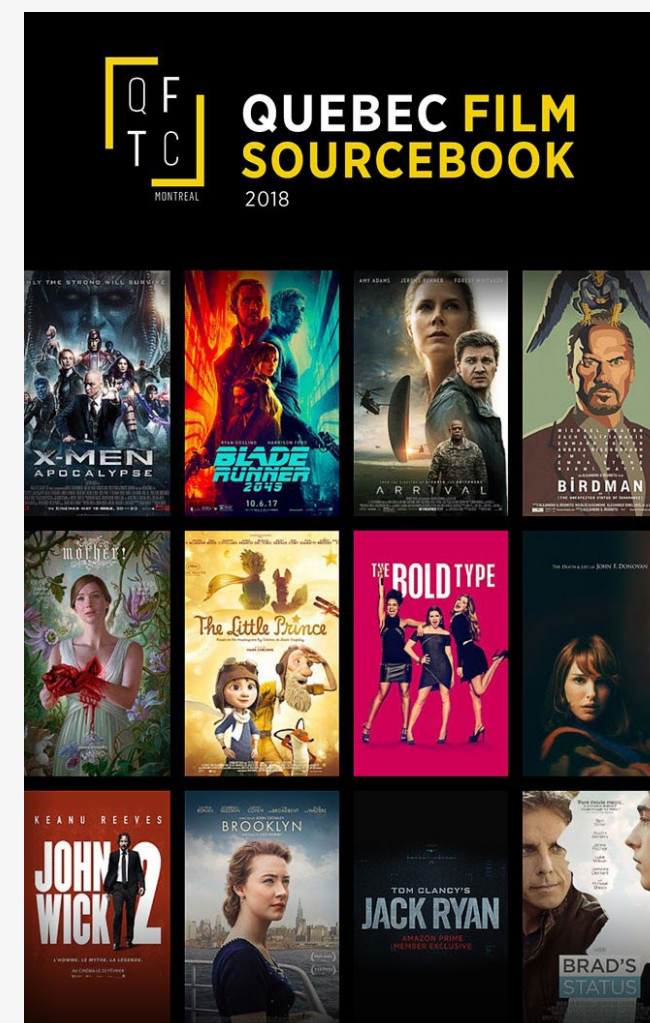


QUEBEC FILM SOURCEBOOK

Available for the past seven years on the QFTC website's home page, the **Quebec Film SourceBook**, offered in three different formats, is distributed annually free of charge to over 3,000 decision-makers in the industry. Its distribution is coordinated by the QFTC during international industry events and representation visits in Los Angeles.

In addition to offering versions in PDF, *E-PUB* and *vÉdition* formats since 2016, the **Quebec Film SourceBook** integrates enriched functionalities, such as video, pop-ups and hyperlinks, thereby creating an interactive experience between advertisers and readers. In order to provide a tool that is always current for industry leaders, the **Quebec Film SourceBook** is also updated monthly.

QUEBEC FILM SOURCEBOOK >



NEWSLETTER

To enhance its visibility in the local industry, since autumn of 2015, the QFTC has been sending out a monthly newsletter to convey information on its latest activities and the different events it participates in. Sent monthly to over 1,500 subscribers in the Québécois audiovisual industry, the newsletter keeps readers informed on the various projects in development, and on new partners and members of the QFTC. In 2017, the newsletter continued to be successful, with an average opening rate of 38%.

NEWSLETTER >

PROMOTIONAL ACTIVITIES

To ensure greater visibility for Québec in foreign markets, the QFTC develops specific promotional tools for each of its business activities. In addition to hanging banners and posters in the most heavily frequented spaces, the Council distributes USB keys, containing relevant information for advantageously positioning Québec, to participants (producers and business managers). To encourage eco-friendly behaviours, each promotional mission organized by the QFTC is developed based on healthy management of residual materials.



Advertisement appeared in *Variety*, April 2017, a special edition for Canada’s 150th anniversary

OUTREACH

MEDIA COVERAGE

THE QFTC WAS **REFERRED TO IN THE MEDIA 77 TIMES** IN 2017-2018

MARCHÉS	
International press	Variety, KFTV, Newscaf, Splah Magaine L.A., TMCnet
Local press	Qui Fait Quoi, La Presse, Le Devoir, The Montreal Gazette, Journal de Montréal, Journal de Québec, CTVM, Lien Multimédia, QMI, Radio-Canada.ca, Les Affaires, Le Lézard, CNW Telbec, EnBeauce, Courrier Frontenac, Annuaire Bellefaye, Sympatico.ca, Tourism Express, Le Courrier du Sud

VARIETY

HOME > ARTISANS > NEWS

APRIL 11, 2017 8:15AM PT

Quebec Production Bounces Back on Strength of High Tech

In addition to traditional work, Montreal and Quebec are spearheading virtual reality and augmented reality content creation

By David Friend



CREDIT: COURTESY TWENTIETH CENTURY FOX

A wave of fresh changes to Quebec's film and TV tax credits is sweetening the bid for Hollywood productions — and also giving a hearty boost to virtual reality projects.

Under a provincial budget unveiled in late March, the region will throw support behind the growing virtual reality and augmented reality industries, qualifying those projects within its broader film tax incentive.

It's part of an array of changes designed to boost Quebec's film industry — particularly at its hub in Montreal — by making it easier for international film and TV projects to qualify for the 20% base rate tax credit that covers all expenditures.

Moreover, film productions can now qualify for tax credits for up to a whopping 43% of their spend when applying the base rate, a 16% bonus on CGI and visual effects, and the federal government's 16% tax credit on eligible labor.

"We're hoping to become a one-stop shop for all types of productions," says Pierre Moreau, general manager of the [Quebec Film and Television Council](#). "Montreal has been setting up for that reality."

READ ARTICLE >

LOCAL ACTIVITIES AND PUBLIC RELATIONS

Each year, the QFTC partners with many major provincial events, to both strengthen existing relationships and develop new collaborations within the Québécois audiovisual industry.

- APRIL AND NOVEMBER 2017 : **Mission Média France-Canada** - The QFTC was a partner of the 8th and 9th missions of the "Rendez-vous d'affaires et coproduction France-Canada", organized by Unterval.
- MAY 2017 : **AQPM Convention**
- JUNE 2017 : **Party des 1 000 de l'industrie**
- JULY 2017 : **Speech by Michael Prupas**, Founder, President and CEO of Muse Entertainment Inc., at the 2017 General Assembly. Mr. Prupas presented his unique background and the major steps involved in the development of his business, which today counts itself among the leaders of Québec's audiovisual industry. He also shared his vision for the future of our industry and the challenges that await the actors of change over the next few years.
- JULY 2017 : **Fantasia** - The QFTC was a partner of this 21st edition of the Fantasia International Film Festival (FRONTIÈRES Market).
- SEPTEMBER 2017 : **Prix Gémeaux evening**
- SEPTEMBER 2017 : **Québec City Film Festival**



- SEPTEMBER 2017 : **Canada China International Film Festival** - The QFTC was a partner of this event.
- OCTOBER 2017 : **Cartoon Connection** - As a partner for the 8th consecutive year, the QFTC supports Cartoon Connection's essential role in various areas, including international intellectual property business for provincial animation producers.
- OCTOBER 2017 : **FNC Forum** - The QFTC was a partner of this event, presented in the context of the 46th Festival du nouveau cinéma.
- NOVEMBER 2017 : **Networking reception for members of the QFTC**
- NOVEMBER 2017 : **Francophone co-production meetings**
- JANUARY 2018 : **Ciné-Québec**



THANK YOU TO
OUR PARTNERS

PUBLIC PARTNERS



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économique Canada
pour les régions du Québec

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for Quebec Regions



Communauté métropolitaine
de Montréal



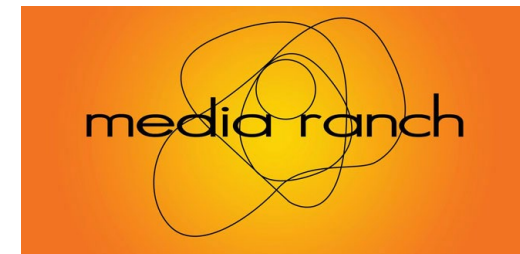
MAJOR PARTNERS



PRESTIGE PARTNERS



MISSION PARTNERS



THANK YOU TO OUR MEMBERS

1976 Productions inc.	CQGCR (DGC Québec)	Makeshift VFX	Rhum - ressources et humains inc.
A.Q.T.I.S.	Demers-Beaulne	Mathematic.tv	Rodeo FX
A.E.I.S.T. 667	Destination Sherbrooke	MCCRT inc.	Rouge Cayenne Inc.
Agence ComediHa	Digital Dimension	MCP Productions	Sailor Productions
Alchemy 24	Digital District	Media Ranch	SHED
Allegorithmic	Entourage Television Inc	Mediabiz Int.	Sinocan Groupe Média
Andrea Kenyon & Ass. Casting	Entr. Ronald Gilbert Inc.	MELS	Sly & Co.
AQPM – Association Québécoise Production Médiatique	Exogene Films	Micro-Scope	Smart & Biggar
Atomic Fiction	Fernandez, Martha	Miller Thomson LLP	Société du Vieux-Port de Mtl
Attraction Média	FICC	Muse Entertainment Entreprises	Squeeze Studios
Audio Post Production SPR inc.	Folks Vfx	Net Post Production	Starno.net
Avanti Ciné Vidéo	Franky Films	Norton Rose Fullbright	Studio Sonogram Inc
B.F. Lorenzetti-BFL Canada	Frima Studio	Oasis Animation Inc.	Studios Framestore inc.
Banque Nationale du Canada	Globalex	Oblique FX	Technicolor
Brain	Groupe PVP	ON Animation Studios Montréal	TORQ Studio
BUF Canada inc.	Groupe Star Suite	Oxford Properties	TouTenKartoon
Bureau du cinéma et de la télévision des Laurentides	Groupe V Média	PMT Vidéo	Traiteur Crew Call Inc.
Bureau du cinéma et de la télévision Montréal	Guilde des musiciens et musiciennes du Québec	PwC	Transfilm Inc.
Bureau du cinéma et de la télévision de la Chaudière-Appalaches	Hybride Technologies inc.	Pro Prod Gestion inc	UDA
Bureau du développement touristique et grands événements, Ville de Québec	IATSE 514	Productions Audio Z inc.	UNLTD
Cinesite inc.	ISART Digital Montreal	Productions Magasin Général inc.	Vice Studio Canada Inc.
Cogeco inc.	ITEM 7	Productions ToonDraw inc.	Vidéo Montréal
Concept Création Mordicus	Kaibou Production inc.	Raymond Chabot Grant Thornton	Ville de Longueuil
	Lavery	Raynault VFX	Vital Productions
	Leclerc Dumont inc.	RealbyFake (Fake Digital Entertainment)	Zone 3
	Les Productions Nicolas Lepage	Reel FX Creative Studios ULC	



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