ISA’s efforts are done with one thing in mind — to protect and grow your business.

2014 Progress Report

www.signs.org/progress14
Membership has its benefits...

- Grow your business
- Increase your profits
- Establish important connections
- Create new business opportunities
- Improve employee productivity

PUT ISA TO WORK FOR YOU

www.signs.org | membership@signs.org | (703) 836-4012
Dear Colleagues,

As we look back on 2014, there is one thing that resonates consistently — the sign and visual communications industry is growing and thriving.

ISA members, like you, drove much of what ISA accomplished in 2014, and I am pleased to present to you our annual progress report that showcases how ISA:

• provided sign industry education to thousands, which elevates the professionalism of the industry
• launched an initiative to drive qualified workers to our industry
• conducted research that proved signs are necessary for vibrant communities
• developed resources that made our members more profitable and efficient
• fought for and created effective sign codes
• changed, for the positive, the local regulatory environment through planner education
• elevated ISA Sign Expo to an event unparalleled by any other

Our industry is thriving because of you. We are proud to serve you and grateful for the leadership of our board, committees and members who have made the sign and visual communications industry a thriving and vital part of the international and domestic economy.

Thank you to each and every member for your support. We look forward to serving you for a bigger, better, bolder 2015.

Lori Anderson, President & CEO
International Sign Association
“Had the electrical requirement taken effect, we estimated we would have lost 50% of our work. ISA’s successful intervention is worth all the dues I’ve paid over the years.”

Roger L. Ostermann, RLO Signs (WI)

“Excellent [hosted buyer] program and networking. Received so much information and knowledge. Met a lot of talented people, not only designers. Very beneficial to professional growth.”

Yin Chen, D/G Studios (TX)
Efforts to expand the influence of the sign and visual communications industry is important to a strong industry, and ISA is proud of its efforts in 2014 to educate and inform key influencers who impact the industry’s growth and strength.

**17 ISA Affiliated Associations** representing 1,700 local/custom sign companies.

585,015 visitors to the top online resources for the sign and visual communications industry: www.signs.org and signexpo.org.

31 IN-PERSON SIGN CODE ASSISTANCE TRIPS

1,750 trained through ISA Sign Academy

735 planners and city officials have a greater understanding of signs and sign codes through ISA-sponsored programs.

$11,000,000 in revenue saved/generated because of ISA sign code efforts.

18,140 increase in attendance at ISA Sign Expo 2014

1,000 designers, architects and specifiers connected to ISA members through ISA’s business growth programs.

750 high school, vocational school and community college students visited sign shops during Sign Manufacturing Day.

27 conferences, trainings and events where ISA staff were keynote speakers, presenters or panelists.

20,275 educators and counselors of secondary/vocational schools were informed that our industry is a profitable career track for professionals.

1,000 industry professionals were inspired and informed at ISA Sign Expo 2014.
Finding qualified workers is a top concern for our industry. When surveyed, sign companies said that attracting workers was the number one concern keeping them up at night. As members, you challenged ISA to help solve this problem. While there is no overnight fix, ISA committed to tackling this issue.

After several strategic sessions and working with members, ISA got to work to create the connections, programs and resources necessary to attract top-quality talent to the sign and visual communications industry.

71% of ISA members said they planned to hire in the next year*

There are 201,000 employees in the sign Industry**
Strategic Partnerships
Solving the issue of a lagging pool of qualified workers for our industry is not one that ISA can solve alone. It is one that requires the help of key organizations that have direct contact with educators, counselors, administrators and students. In 2014, ISA began working with the Association for Career & Technical Education (ACTE), National Occupational Competency Testing Institute (NOCTI) and SkillsUSA to help drive qualified professionals to the sign and visual communications industry. But to really understand the impact these organizations can have on helping ISA solve the problem of a diminishing workforce, we felt it was important for you to know more about the segments they serve and the vast number of contacts and connections within their ranks.

Association for Career & Technical Education (ACTE): ACTE has more than 20,000 members at the secondary, postsecondary and adult levels.
www.acteonline.org

National Occupational Competency Testing Institute (NOCTI): NOCTI is the largest provider of industry-based credentials and partner industry certifications for career and technical education (CTE) programs across the nation.
www.nocti.org

SkillsUSA: SkillsUSA serves more than 300,000 students and instructors annually from 13,000 school chapters in 54 state/territorial associations and connects with more than 14,500 instructors and administrators.
www.skillsusa.org

LOOKING AHEAD
Coming soon will be a new online Career Center showcasing a job board, resource for employment, career development and more. Also, in partnership with NOCTI, ISA will develop and implement a designation specific to the sign and visual communications industry that students and workers can use to identify that they have completed core competencies in select skills identified by ISA and its members.

TWO NEW TOOLS FOR ISA MEMBERS

Video: A picture says a thousand words — videos say even more to today’s younger generation. Check ISA’s YouTube channel for a video created to attract 17–22 year olds to our industry. This video was vetted by this age group to ensure it would resonate with that audience. It will be used by ISA, Affiliated Associations and partners to entice potential future employees to take a look at the sign and visual communications industry as a career option.
www.signs.org/youtube

Fact Sheet: A fact sheet was created to provide a quick overview of how our industry offers great pay, excellent opportunities and job security. It was delivered to 20,000 ACTE members and presented at ACTE’s first Career Pavilion at its annual meeting in Nashville. This fact sheet is available to ISA members for use in their local communities to attract qualified workers.
www.signs.org/careerinfo

ISA’s second annual Sign Manufacturing Day held October 3, 2014, was a huge success. The number of sign companies participating doubled from the previous year and attracted more than 1,000 elementary, middle and high schools, and technical college students. Sign Manufacturing Day is conducted in partnership with the National Association of Manufacturers (NAM), the nation’s leading advocate for manufacturing in America.

Teenagers may not think about the signs that show them where they can take a date to a movie or where they can quench their hunger at a drive-thru. So it can be eye-opening when they see a sign in production. The purpose of Sign Manufacturing Day is to promote the sign and visual communications industry as an exciting and rewarding career choice.

Plans are already underway for Sign Manufacturing Day 2015 on October 2. If you are interested in participating, contact ISA at info@signs.org.

As a result of Sign Manufacturing Day, several participating sign companies were asked about internship, co-op and job-shadowing possibilities for students.

Wendy and Joe Ramsay, Ramsay Signs Inc. in Portland, Ore., participated in Sign Manufacturing Day for the first time in 2014 and they couldn’t have been happier. The buzz created by the students and teachers visiting Ramsay Signs was so great that the Sabin-Schellenberg Professional Technical Center’s regional coordinator called Wendy and Joe to request a personalized tour of their facility so she could learn more about the sign industry. Wendy and Joe were thrilled to host another tour and, as a result, the Ramsays are working with the technical center to develop opportunities for students to gain hands-on experience at the sign shop.

After students toured North American Sign Company in North Bend, Ind., the percent of students considering a career in the sign and visual communications industry increased by 28%.
Using SFI Research for Better Regulation

SFI released several new resources in 2014 to help sign companies, local officials and sign users make more informed code decisions. ISA uses SFI research on the economic value of signs, EMC brightness studies, and other key statistical data to fight onerous regulations being imposed on local sign companies.

Developing Resources That Increase Profits and Expand Business

Illuminated vs. Non-Illuminated Study — Signs need to be effectively illuminated at night because, “Signs Mean Business.” If you can’t see the sign, you can’t promote your business. This research focuses on the importance of illuminated signs and the positive impact on communities and their residents.

Temporary Signs — Temporary signs are becoming more prominent as a form of advertising for businesses, but these signs are also being targeted by local officials. This new research states why temporary signs are a necessity for businesses and how they can be reasonably regulated.

Signs and Downtown Development Research — Partnering with the International Downtown Association (IDA), SFI developed research to educate downtown city managers on the value of urban identity and branding, wayfinding and landmark signage.

Typography — Creating effective signage that drives customers and increases profits helps build our industry. One of the most important parts of a sign is typography. SFI produced a four-part white paper and three-part webinar series to educate sign companies, designers, specifiers, architects, planners and more on the importance of typography to the success of a sign.

NSREC 2014 Takes Collaboration to New Levels of Excellence

The National Signage Research and Education Conference (NSREC) brought together over 100 academics and government officials to learn about research on the economic values of signs to sign users, the importance of appropriate sign codes and best regulatory practices in the industry.
“I learned way more about signage [from ISA] than I ever thought I would...and in a fun and exciting way! Thank you.”

Eric Santiago, Downtown Evanston (IL)

“Continuing education is key to...
“ISA Sign Expo is outstanding. The networking opportunities are fantastic and the ability to see the new technologies and understand what’s going on with the sign industry is invaluable. We have a national presence, and this show gives us opportunities to see people all over the country and service our clients better.”

Betsy Ewart, Cummings Resources (TN)

“My membership is a real benefit to get to know people and to learn how other people do things, and just be a part of the industry. My membership gives us outlets for information, support, sign codes and other information to help us do our jobs better.”

Ray Wilson, Oxford Graphics (AR)
ISA understands the importance of producing events that help the industry and its members meet and network. It is through these personal connections and collaborations that new ideas are discussed, solutions are found and resources are developed to help meet the biggest challenges facing members.

Key industry events produced by ISA in 2014:

**ISA Affiliated Associations**
- Dynamic Digital Day
- ISA International Sign Expo
- ISA CONVERGE (formerly ISA SDC)
- Networking Reception for National and Custom Sign Companies
- Sign Manufacturing Day
- Hosted Buyer Program for Designers, Architects and Specifiers
- Leadership Congress
- The Signage Foundation Inc. (SFI) National Signage Research and Education Conference
- Planning for Sign Code Success™
Sign and visual communications companies looking to onboard new employees or train existing employees look to one source — ISA Sign Academy. Whether it’s in-person at ISA Sign Expo, at a regional event, online through ISA webinars or online learning courses, ISA Sign Academy covers the entire lifecycle of your business.

**ISA’s Company Package Educates the Industry**

In 2014, hundreds of sign industry professionals received training through the ISA Sign Academy Online Company Package. ISA Sign Academy Online provides access to practical, relevant, high-level training designed by thought-leaders in the sign and visual communications industry and covers everything from dynamic digital signage to project management to safety. Packages start at only $500. Contact ISA at education@signs.org to start educating your staff today.

**Expanding Outreach to Influential Specifiers**

In 2014, the ISA Hosted Buyer Program brought 50 key specifiers to ISA Sign Expo in Orlando. These professionals were architects, experiential graphic designers, brand managers, downtown developers and end users — people tasked with large signage projects within a larger construction project, and yet with little familiarity with sign materials or best practices. The 50 delegates were energized about the industry through education, networking events with national sign companies and guided tours of the exhibit hall. ISA continued to cultivate this important segment throughout 2014 and has strong partnerships with the Society of Experiential Graphic Design (SEGD), the American Institute of Architects (AIA), the International Downtown Association (IDA) and the Association of Retail Environments (ARE).

“I thought that ISA Sign Expo was a tremendous networking opportunity. It was great to see so many new products and meet representatives from companies whose products we specify. I feel empowered to be able to contact suppliers to find out the different uses of their products in our market.”

Amy Siegel, Gensler (CO)
IMPROVING THE REGULATORY ENVIRONMENT

Planner Outreach
One of our most valuable and successful services to the industry involves our growing and improving relationship with the planner community. ISA’s sign code strategy has evolved considerably in recent years to find common ground and increase collaboration. This approach has resulted in a more positive relationship with the planner community and measurable changes in the sign industry’s perception of how sign codes are impacting the industry.

Nearly 4,000 planners received sign industry information through the following programs:

- Planning for Sign Code Success™ seminars in seven U.S. cities
- ISA presentation at the National American Planning Association convention
- Presentations at two regional APA events
- APA webinar conducted by ISA and presented to 249 planners
- Planner sessions at ISA Sign Expo
- Quarterly planner newsletter disseminated to more than 3,000 planners nationwide

These efforts contributed to a more positive view of sign codes, as noted in the 2014 State of the Industry Survey conducted at ISA Sign Expo.

<table>
<thead>
<tr>
<th>SIGN INDUSTRY’S PERCEPTION OF SIGN CODES</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving</td>
<td>25.95%</td>
<td>8.60%</td>
</tr>
</tbody>
</table>

State Level Efforts
ISA’s efforts resulted in several state-level victories in 2014. Successes were noted in Wisconsin, Colorado, Washington, Oregon, Kentucky and Georgia. The topics involved licensing requirements, regulating EMCs and others.

Sign Code Advocacy
ISA’s in-person sign code assistance, aka “rapid response,” helped many member companies in cities all across the country. Sign code victories were achieved in Chicago, IL; Raleigh, NC; Kitsap, WA; Newport News, VA; Apache Junction, AZ; and Westchester, NY.

Regulatory Impact
ISA’s work with the American National Standards Institute to set federal ADA guidelines resulted in the disapproval of a proposed mandate that would place additional burden on the sign industry. In 2015, the third and final year of this code cycle, ISA calls on members to assist in efforts to continue defeating this mandate before it is put into the 2016 ADA standards.

ISA exhibited at five regional events of the International Association of Electrical Inspectors (IAEI) to promote the safety and acceptance of electrical sign products. ISA’s presence at these events establishes ISA as the resource for the electrical inspectors regulating sign products.
There is nothing like the confidence that comes from going into a dispute knowing that the facts are on your side. When Mike Burnett, estimator and former owner of SignMedia Inc. in Hampton, VA, heard that the city of Newport News was considering significant — and somewhat under-the-radar — sign code changes, he immediately began gathering the facts.

With a meeting scheduled for the next morning, he contacted ISA’s Kenny Peskin, Manager, State and Local Affairs, who began helping Burnett identify fact-based research that would alleviate many of the planning commission’s concerns.

That first meeting led to another meeting, and “The planning commissioner was very impressed that I had done my homework,” Burnett said. “When I presented a copy of the two model codes, I asked if they were aware of these and all the information that ISA had available. It carries weight when you have the International Sign Association standing up there saying, “This is what I do throughout the whole country to educate city officials on things that you should know.”

Just before the official meeting, one of the zoning staff pulled Burnett aside and told him that they had made significant revisions to the working draft to incorporate the research Burnett had shared.

“They gave us 99% of the things we had asked them to change,” he said. “The codes were still more restrictive than we’d been operating under, but they were more realistic changes.” When the new codes were presented to the council, there was no opposition and it quickly passed.

Burnett estimates that 40% of the company’s business is in Newport News and despite his long history in the sign industry, being able to make his arguments supported by credible research gave him confidence to take on the fight.

**This victory saved at least $100,000 worth of business for Burnett.**

Imagine if every community took a similar approach and sought the input of experts who work nationwide on sign codes.

**The stakes are high: signs build businesses, which lead to stronger communities. So there is little doubt it’s a battle worth fighting.**
ISA devoted significant resources to groundbreaking research initiatives in 2014. This research is designed to help better identify the sign industry’s role in the broader economy, as well as to give insight to help sign companies grow their businesses.

The ISA Economic Impact of the Sign and Visual Communications Industry™ study by Ernst & Young, showed the effect that the industry has on the U.S. economy. The study estimates the industry generated at least $37.5 billion in direct and indirect economic output with more than 200,000 U.S. employees in 2012.

Research to help sign companies and suppliers/distributors understand where opportunities exist to grow business is important to all segments of our industry. ISA’s two-part Wide Format Print & Media Mix Survey, conducted by InfoTrends and sponsored by 3M, puts a current spotlight on the wide format segment of the sign industry, assessing where print shops will grow and what products and services they are investing in.

The National Survey of Operations for national sign companies allowed ISA Direct Sign Company Member companies to benchmark their operations to others in the industry.

ELEVATING THE INDUSTRY THROUGH RESEARCH

200,000 U.S. employees in 2012

$37.5 billion in direct and indirect economic output

LOOKING AHEAD

2015 RESEARCH PROJECTS

- Digital Technology: Neighborhood-Friendly Digital Displays — Standards and Best Practices
- Urban Sign Code: Best Practices in Urban Sign Codes
- Retail Signage: Retail Strategy Best Practices
- Retail Wayfinding: Retail Wayfinding Best Practices
- Digital Print: Digital Printing — Best Practices
- Wide Format Print: The Benefits of New, Innovative Curing Technologies
- Sign Industry Quarterly Economic Report: Predicting Key Trends in the Sign and Visual Communications Industry
Economic forecasting by businesses is important to prepare for shifts that can impact their bottom line. ISA’s Sign Industry Quarterly Economic Report (formerly Market Monitor) was launched in 2014 for members to gain insight into economic trends across multiple segments of the industry and to serve as a key strategic tool for business as they execute their annual business plans.

Research conducted last year provided members with important data and trends. Sign companies used the data to make business decisions, generate new business and fight for better permits. Some of the main studies released last year were the State of the Industry, Digital Signage Powers the Industry, Building Opportunities in Architectural Signage and The Benefits of New Innovative Curing Technologies. All of these studies are available to ISA members by contacting info@signs.org.

“The knowledge, experience and professionalism that ISA brought to the table really helped to give credible input to the sign industry’s position on proposed codes.”

Bill Stupansky, Precision Sign Company (CO)

“All the literature and resources you get from ISA are a real benefit. They keep you informed of everything that’s going on.”

Carl Bedford, Carl’s Signs (FL)
The ISA International Sign Expo experienced considerable successes in 2014, including the highest Orlando attendance since 2008 and the highest number of partners in ISA history. Partners included ALMO, who hosted a delegation for digital education, and Society for Experiential Graphic Design (SEGD) for new workshops on design and innovation. In all, 25 organizations partnered with ISA Sign Expo 2014, including American Institute of Architects, GRAPH EXPO, Hiring Our Heroes, Inflatable Advertising Dealers Association, European Sign Federation (ESF) and Digital Signage Federation (DSF). ISA Sign Expo is the must-attend event for the entire sign and visual communications industry.

ISA is proud of the success of ISA Sign Expo 2014, held in Orlando, FL, and would like to thank the sign industry for its support of the premier sign show for the sign and visual communications industry. Beyond signs, the ISA International Sign Expo is a community of friends, colleagues and partners who create an unforgettable experience each spring. The 2014 show was a record-breaking event and represented an excitement and optimism that will continue to drive our industry forward.

ISA International Sign Expo 2015 will be the largest show floor in ISA Sign Expo history! The show floor has already been expanded and even with the expansion it is on track to sell out, occupying more than 215,000 NSF. And pre-registration for the show is skyrocketing. ISA Sign Expo will attract 21,000 industry professionals coming together to explore, network, and gain the insights, tools and resources they need to improve productivity, boost revenue, add new profit centers and expand their business!


Immerse yourself in all things sign and visual communications at ISA SIGN EXPO 2015

Register today at SIGNEXPO.ORG/PROGRESS14
ISA INTERNATIONAL SIGN EXPO 2014

199,000 net square feet of exhibit space
18,140 industry attendees
585 exhibiting companies

45 strategic partnerships with key industry organizations
50,000 business leads generated
3,400 net square feet dedicated to Dynamic Digital Signage

397 design firms
1,539 education seats filled (a 34% increase over 2012)
773 specifiers/designers/architects

In 2014, ISA Sign Expo was recognized by Trade Show Executive as one of the 50 fastest growing trade shows and named to the Trade Show Executive Gold 100 list as one of the top 100 trade shows.
ISA provides unparalleled support for all aspects of business success.

SIGNS MEAN BUSINESS!

For more information on getting the most from your ISA membership, call (703) 836-4012 or email membership@signs.org.

FOLLOW US ON

62.5% increase in followers on @ISA_Signs
33% increase in followers on @ISASignExpo
34,044 views of ISA produced videos
2.46 MILLION PR impressions (not including social media)
2,378 mentions in the press

www.facebook.com/ISAsigns | www.signs.org/linkedin | @ISA_Signs @ISASignExpo | www.signs.org/youtube

1001 N. Fairfax Street, Suite 301, Alexandria, VA 22314 • Tel: (703) 836-4012 • Email: info@signs.org
WWW.SIGNS.ORG/PROGRESS14