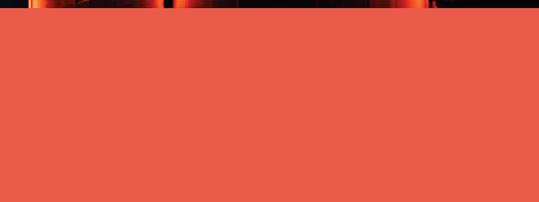
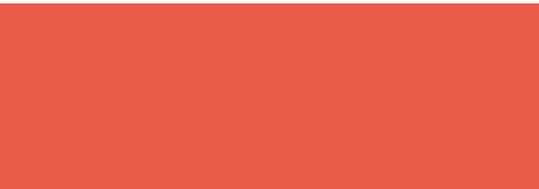




Overview of the Canadian Sign Industry



This publication has been produced by the Sign Association of Canada for use by sign companies and municipal planners. Through this information, we hope to enhance the understanding of the Canadian sign industry, look at the various industry segments it contains, and discuss trends and future opportunities.

The Sign Association of Canada would like to take this time to acknowledge the SAC Government Relations Committee members who participated in the research and development of this publication. We thank you for your time and efforts.

Copyright ©2015 Sign Association of Canada



Sign Association of Canada

1 Yonge Street, Suite 1801

Toronto, ON, M5E 1W7

T: (905) 856-0000

F: (905) 856-0064

info@sac-ace.ca

www.sac-ace.ca

FOLLOW US ON



www.facebook.com/sacace



[@sacace](https://twitter.com/sacace)

Executive Summary



\$3B
in manufacturing
revenue



The Canadian sign industry is a multibillion dollar industry. It is unique in that it involves many occupations under one umbrella: sign installers, fabricators, welders, electricians, graphic designers, technical drafters, urban planners, permit specialists, sales, administrators, and more.

As part of a wide-ranging effort to raise awareness of the sign industry in Canada, the Sign Association of Canada conducted a study of the Canadian sign industry. Through our extensive research, we found that the Canadian sign industry is bigger and more influential than many realize.

While traditional sign manufacturing still makes up the largest portion of the total sign industry, the latest statistics indicate a strong projected growth for digital signs.

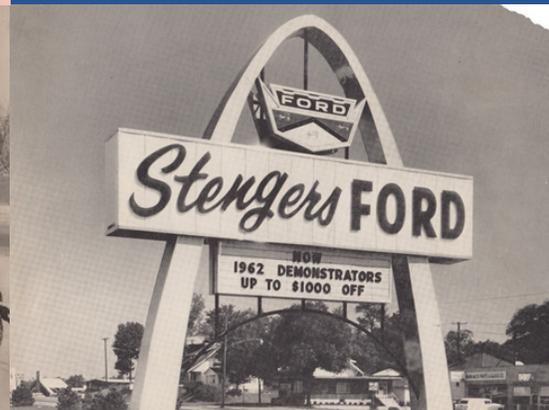
This study estimates that in 2015 the Canadian sign industry is comprised of over 4000 businesses, employs close to 20,000 employees and will have a combined revenue of over \$3 billion CAD.

The objective of this study is to provide insight into the Canadian sign industry in the 21st century, to look at the various industry segments it contains, discuss trends and consider future opportunities.

Changing landscape of the sign industry

Trying to define what signs are is a challenging undertaking. Early in the history of place-based advertising, signs were simple to define. They were messages that were attached to the wall, posted on a pole or mounted on a roof or the side of a building. Today's sign manufacturing has evolved beyond the traditional electric and non – electric signs: signs and sign boards made of plastic, wood, vinyl, glass; electric backlit signs; metal signs; neon signs; plaques and plates; and scoreboards.

The latest advancements in sign making technologies have blurred the traditional sign industry boundaries. Digital signs and digital printing are now large players in the sign industry. Today, digital signs and digital printing products dominate the Sign Association of Canada's CONSAC National Sign & Graphics Tradeshow as well as the International Sign Association's Sign Expo Tradeshow, which are North America's largest sign tradeshows and also, arguably, the best indicators of sign industry's trends in North America.¹



Definition



A recent EY (Ernst and Young) study commissioned by the International Sign Association defined the sign industry as an industry made up of businesses that design, produce, install, maintain and repair sign products. (e.g. paper signs, digital signs, and traditional signs).² This analysis will use the same definition.

The Canadian, American and Mexican governments classify business establishments by the primary activity they are engaged in using the North American Industry Classification System or NAICS for short. This study will follow the government prescribed classification system as it currently provides the best impartial statistical framework to facilitate the analysis of the sign industry.

Figure 1 identifies the Canadian sign industry segments, provides descriptions of the types of establishments represented in these segments and illustrates examples of each specific type.



Canadian Sign Industry Segments

Figure 1: Canadian Sign Industry Segments ³

Type	Description	Illustrative Examples
Traditional Sign Manufacturing NAICS # 339950	Establishments primarily engaged in manufacturing signs and related displays, of all materials except paper and paperboard.	Electrical signs, including electronic message centres and dynamic digital signage; non-electric signs, including signs and sign boards made of plastic, wood, vinyl, glass; advertising displays; electric backlit signs; metal signs; neon signs; plaques and plates; scoreboards
Display Advertising NAICS # 54185	Establishments primarily engaged in creating public display advertising material, such as printed, painted, or electronic displays, and placing such displays on indoor or outdoor billboards and panels, on or within transit vehicles or facilities, in shopping mall displays, and on other display structures or sites.	Advertising services; indoor or outdoor displays; billboard display advertising services and display agencies; display advertising; display installation services; signs and displays space, rental services; store display advertising services; transit advertising services
Digital Printing NAICS # 323115	Establishments primarily engaged in digital printing. These establishments use computer-controlled non-impact (electrostatic, ink jet, spray jet) printing equipment.	Digital Printing and digital printing shops (e.g., billboards, large format graphical materials and high resolution). Establishments in this industry typically have extensive pre-press operations, including specialized scanners and colour-separation equipment.
Promotional Products in Canada - Display and Sign Lettering Services NAICS # 54189	Establishments, not classified to any other Canadian industry, primarily engaged in providing advertising related services.	<p>According to IBISWorld⁴, Display and Sign Lettering Services make up 9.5% of Promotional Products segment.</p> <p>Examples of Display and Sign Lettering services include: Lettering services on doors and windows; Sign Painting and Lettering services</p>

Canadian Sign Industry Segments

It is important to note that while using NAICS codes is currently the best method to source data regarding the industry, the challenge is that there are businesses engaged in sign making that fall into multiple industry segments. For example, Digital Printing (NAICS 323115) falls under the larger Printing Industry segment (NAICS 32311) but the data for the digital printing sub-segment is not as readily available as the Printing Industry segment. Another example is Display and Sign Lettering, which falls into the Promotional Products segment (NAICS 54189).

There are other businesses that take part in sign making activities but belong to other industries. For example, there are graphic design services that work with the sign makers in designing signs. The Graphic Design industry segment represents an expected \$1.4 billion dollars in revenue in 2015, with an expected revenue growth of 3.2% in the next five years and 6638 businesses across Canada.⁵ There are also repair, maintenance, and installation service providers who work with the sign manufacturers. Furthermore, there are large scale sign supply companies that distribute products to the sign industry. Examples of sign supplies include substrates, digital print media, sign vinyl, inks, sign frames and stands, large and grand format solvent, UV printers, just to name a few. In addition, the sign industry also includes planning firms who specialize in, among other things, sign permit approval processes.

This speaks to the fact the sign industry is unique in that it includes many trades under one umbrella, which needs to be kept in mind when estimating the overall Canadian sign industry's economic impact.

The revenue figures presented in Figures 2 and 3, pertain strictly to the sign manufacturing segments as defined by NAICS codes. However, considering all the different industries participating in the sign making process, the estimates presented here are on the conservative side.

Canadian Sign Industry Revenue Figures

Figure 2: Macro-level overview of the Canadian sign industry as of 2015 as well as projections for the next 5 years⁶

Type	Manufacturing Revenue (2015) (billion)	Profit (\$million)	Industry Value Added (\$million)	Annual Growth (2010 – 2015)	Annual Projected Growth (2015-2020)	Employees	Total wages & salaries (\$million)	Average annual salary per employee (\$ per annum)	Businesses	Provincial Distribution (% of Canada)
Traditional Sign Manufacturing (NAICS 33995)	\$1.36	\$43.6	\$513.5	1.2%	0.5%	9,647	\$419.9	\$43,526	1,840	1. Ontario: 41.0% 2. BC: 16.4% 3. Quebec: 15.7% 4. Alberta: 13.6%
Display Advertising (NAICS 54185)	\$1.1	\$119.8	\$472.7	2.5%	3.4%	5,847	\$252.1	\$42,398	1,138	1. Ontario: 47.2% 2. Quebec: 17.7% 3. Alberta: 13.2% 4. BC: 12.1%
Digital Printing (NAICS 323115) ⁷ Unless otherwise stated, all statistics are as of 2010	\$0.43					2,703	\$119		713 (As of Dec 2013)	1. Ontario: 47.0% 2. Quebec: 18.9% 3. BC: 16.7%
Display & Lettering Services (NAICS 54189) 9.5% of Promotional Products in Canada	\$0.152					1,481	\$44.8		318	For the entire NAICS 1. Ontario 45.6% 2. Quebec: 22.3% 3. BC: 14.2% 4. Alberta: 11.1%

Key Terms:

Manufacturing Revenues include the value of goods produced by its establishments, including custom and repair work, as well as goods made under contract. They are valued in current Canadian dollars.

Industry Value Added: The market value of goods and services produced by the industry minus the cost of goods and services used in production. IVA is also described as the industry's contribution to GDP, or profit plus wages and depreciation.

Revenue

The largest segment of the sign industry is Traditional Sign Manufacturing, with revenue of \$1.36 billion in 2014 - 2015. Traditional Sign Manufacturing has experienced a growth rate of 1.2% per annum over the past 5 years and is expected to remain steady for the next five years. Similar to many other manufacturing industries, the sign industry experienced a small contraction during the economic downturn in 2008. However, it is expected that as the economy strengthens and the demand for advertising and new signage increases, so will sign manufacturing revenue and profit.

The Display Advertising segment, which includes indoor and outdoor electronic displays, grew at a rate of 2.5% per annum over the past 5 years. It is expected that the industry will continue to grow at a projected rate of 3.4% per annum in revenue as well as 3.3% in employment over the next five years. What should be also noted is that along with the increase in revenue and employment, "total wages are also forecasted to rise over the five-year period, as the growth of digital displays will require more high-skilled workers and retraining some of the existing employees."⁹

The growth in demand for dynamic digital signage is echoed by the results from a recent International Sign Association's (ISA) "2015 State of the Industry Survey" conducted at the ISA International Sign Expo. With over 19,000 attendees from all facets of the sign industry, the survey provides a comprehensive overview of the industry. When presented with a list of possibilities for new business opportunities in the coming year, as per Figure 4, one of the top three areas of anticipated growth was in dynamic digital signage, with 36.5% of attendees seeing business potential in this area for 2016, up 11% from previous year.¹⁰

Figure 3: Revenue by Sign industry segment:⁸

Geography	NAICS	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Canada	Display Advertising [54185]	\$945,000	\$955,400	\$974,100	\$948,100	\$1,076,900	\$1,006,500	\$1,000,800	\$1,016,900	\$1,065,500	\$1,089,200
Canada	Traditional Sign Manufacturing [33995]	\$1,254,449	\$1,265,844	\$1,245,134	\$1,229,668	\$1,257,023	\$1,336,014	\$1,324,492	\$1,364,600	\$1,361,600	\$1,363,900

All Revenue x 1000

The 11% growth in interest in expanding business to dynamic digital signage is statistically significant as it represents the biggest change in anticipated business growth.

In addition to the two main sign industry segments mentioned above, Digital Printing as well as Display and Lettering services also represent a healthy segment of the sign industry.

While the \$8.8 billion dollar printing industry¹² as a whole has been contracting at a rate of 1.2% over the past 5 years and is expected to continue to decline at an additional rate of 2.4% over the next 5 years, the digital printing segment is experiencing growth. In 2010, digital printing accounted for 22.4% of the printing market and in 2015 it is expected to account for 31.2% of the printing industry.¹³

Display and Lettering services are expected to account for 9.5% of the \$1.6 billion Promotional Products industry revenue in 2015. This segment primarily consists of temporary signs such as signs made for special promotions, event sponsors or other banners. This segment has remained relatively constant over the five years to 2015.¹⁴

Figure 4: Areas where you see business expanding next year?*: ¹¹

This question was asked of all the attendees – including the CEOs – who attended the 2015 ISA Sign Expo.

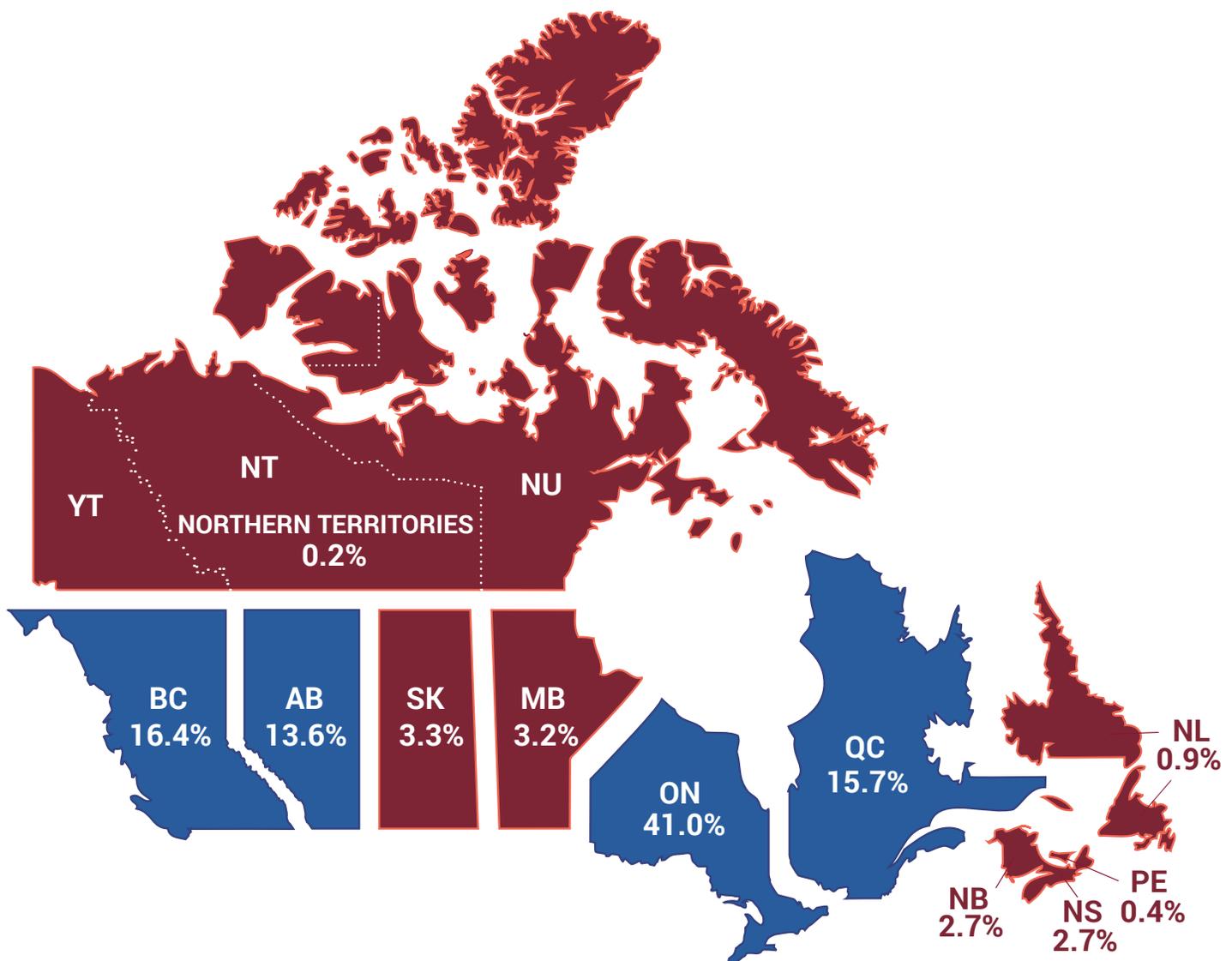
Type of Signage	2015	2014
Commercial printed	38.35%	37.00%
Architectural signage	23.60%	28.00%
Retail	32.70%	27.30%
Dynamic digital signage	36.50%	25.50%
Point of purchase	15.63%	17.60%
Wayfinding	7.67%	16.90%
Substrates	8.55%	12.00%
Green/environmental	4.13%	9.70%
Temporary/inflatables	0.88%	1.90%

*Respondents could select more than one answer

Business Locations

The majority of the sign companies are in four provinces: Ontario, British Columbia, Quebec and Alberta. While Figure 5 represents the Traditional Sign Manufacturing segment, there is a similar distribution for other sign manufacturing segments. This distribution of sign manufacturing establishments is in line with the Canadian manufacturing sector, whereby most of the businesses are concentrated in the most populous regions of Canada.

Figure 5: Business locations for the Traditional Sign Manufacturing segment:¹⁵

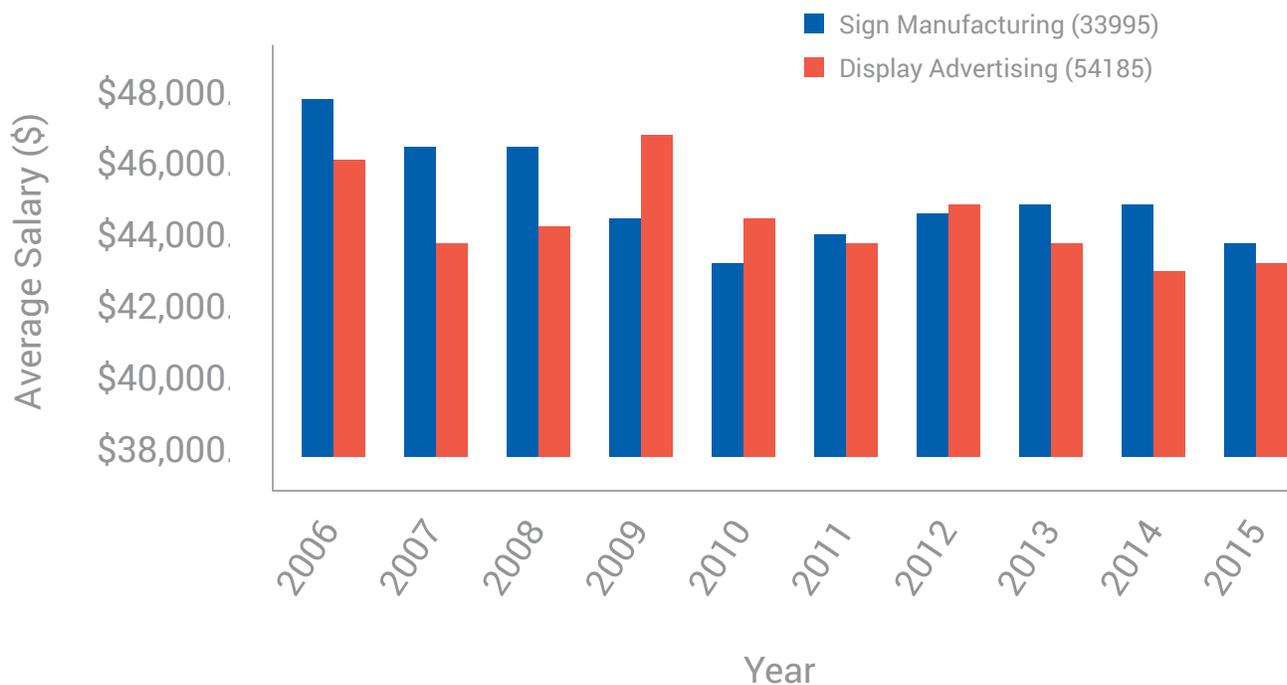


Employees & Salary

Currently there are approximately 9,650 employees within in the Traditional Sign Manufacturing sector and an additional 5,850 in the Display Advertising sectors. Based on the statistics available from Statistics Canada and IBISWorld, it is estimated that there are at least an additional 4,000 people (combined) employed in the Digital Printing and the Display Lettering industry segments producing signage.

In 2015, the projected average annual salary for employees in the Traditional Sign Manufacturing segment will be \$43,526, not including benefits. As per Figure 6, prior to the economic downturn in 2008, the average salaries in the Traditional Sign Manufacturing sector were at an all-time high of almost \$48,000 and still have not returned back to those levels. This is similar to wages in the manufacturing sector in general.

Figure 6: Average Salaries for employees in the Traditional Sign Manufacturing as well as Display Advertising sectors from 2006 to 2015 ¹⁶

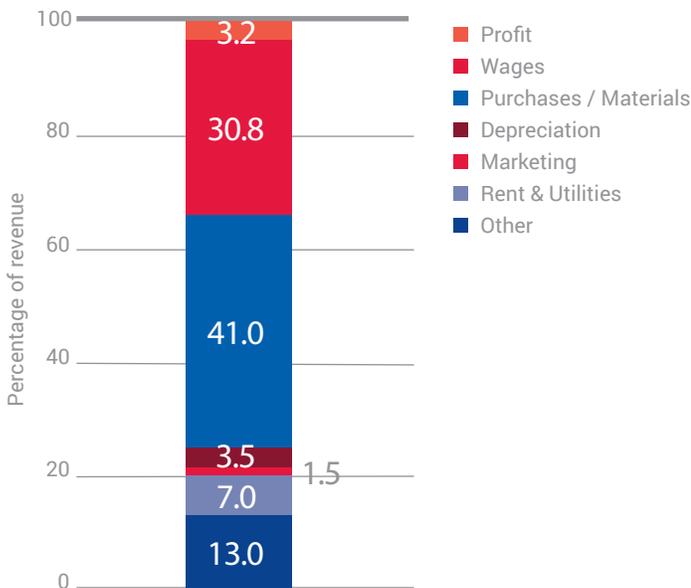


Cost Structure

Traditional Sign Manufacturing is unique in that it is in the custom business and not the streamlined volume business; meaning that most signs are not created in bulk. Other than signs made for large organizations with multiple locations, such as banks, chain stores and gas stations, most other businesses have only one location and will only need custom signs made specific to that location.

The Traditional Sign Manufacturing industry's average profit margin (earnings before interest and taxes) is estimated to account for 3.2% of the revenue in 2015. As per Figure 7, purchases of supplies to produce signs as well as wages account for the biggest portion of costs.

Figure 7: Traditional Sign Manufacturing Shop Costs¹⁷



Purchases include aluminum, wire, sockets, inks, LEDs, metal casings, electrical components, wood, veneers, substrates, vinyls, and other manufactured products.

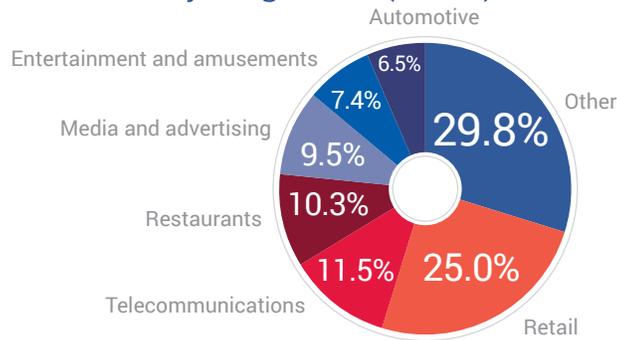
Most sign companies within the Traditional Sign Manufacturing industry are too small to exert pricing pressure on suppliers, making them vulnerable to changes in cost of the supplies.¹⁸

A significant factor affecting Canadian sign manufacturing business' cost is the strength of the US dollar. When the Canadian dollar is weak, the cost of supplies used to manufacture signs increase.

Even with the introduction of new technologies such as channel benders that have automated an element of the sign production, sign making remains labour intensive. Therefore, the level of customization required for most signs means that employee wages will continue to constitute a substantial portion of the total revenue figure.

Traditional Sign Manufacturers' Customers by Segment

Figure 8: Major Purchasers of Sign Products by Segment (2015)



Total \$1.36B

The retail sector represents the largest segment of sign buyers at 25%, followed by telecommunications at 11.5%, restaurants at 10.3%, media and advertising at 9.5%, entertainment and amusement at 7.4%, automotive at 6.5% and other at 29.8%. The Other category includes, but is not limited to, institutions such as government, educational establishments, and hospitals. ¹⁹

Demographics

A recent 2014 *Sign Media Canada*²⁰ survey of sign manufacturers indicates that the majority of companies in the Canadian sign industry are small businesses, with middle aged employees who have limited or no relevant sign industry related post-secondary education

- 68 % of sign shops employ 1 to 10 employees
- 50% to 60% of the shops have less than a \$1 million in annual sales; 21% make between \$1 and \$3 million; 7% make \$4 to \$9 million and 8% make \$10 million or more
- 72% of employees are male and 28 % are female
- 46% are 50 years of age or older; with another 20% between the ages of 40 and 49
- With respect to levels of education: 24% indicated they have a high school diploma or equivalent, 26% indicated they have some college degree or no degree; 16% indicated they have a two-year degree; 19% had an undergraduate degree; 9% indicated they have a Master's degree
- Of the respondents who indicated they have a degree, 82% said that it did not relate to the sign industry

Future Opportunities and Trends in Technology

Talent Attraction:

The demographics indicate a special area of opportunity for young talent. As the baby-boomer generation starts to retire, there will be jobs that will need to be filled with skilled professionals. This sentiment was also shared at the recent 2015 ISA Sign Expo, where 68% of the CEOs surveyed indicated that they were looking to increase staff.²¹ As per Figure 9, employees in installations, sales and creative remain the three most sought-after areas for employers.

Figure 9: Departments Adding Staff in 2015*:²²

This question was asked only of the subset of CEOs who indicated they would hire in the coming year.

Department	2015	2014	2013
Production/ installation	61.60%	58.10%	39.30%
Sales	45.50%	52.70%	27.50%
Graphic design/ creative	30.30%	24.80%	13.70%
Operation/ management	25.30%	22.70%	12.40%
Administration	14.10%	20.20%	6.80%

*Respondents could select more than one answer

There is a significant gap in the availability of sign technician education programs in the North American school system. Over 60% of ISA survey respondents indicated that finding qualified workers remains one of the biggest workforce issues for the sign manufacturers. Furthermore, the fact that 82% of the above-mentioned *Sign Media* survey respondents indicated that their degree does not relate to the sign industry, implies that there are opportunities to introduce sign making skills both at the high school and college levels.

What helps the sign industry is that the school boards across Canada and the United States are starting to realize that the slow erosion of shop classes taking place since the 1970s has been a colossal mistake.²³ There are too many young adults graduating with a four year degree, thousands of dollars in debt and not being able to find a job. In the words of Sir Ken Robinson, author, influential speaker and government advisor, "viewing vocational programs as second-rate is one of the most corrosive problems in education."²⁴ Many of the young people who followed the conventional wisdom and went to university, could have been much better off with a two-year skilled-trade or technical education. The sign industry should capitalize on this momentum and work with the school boards to introduce elements of sign making to shop classes.

Digital Display Signage:

According to a recent *InfoTrends* analysis, the revenue from digital display signage systems is expected to surpass \$14 billion in 2014 worldwide and growth projections for the digital signage market range from single digits to more than 40% per year over the next few years.²⁵ Based on the data provided in Figures 2 and 3, there is a similar trend in Canada. There has been a steady growth in the digital displays industry segment over the past five years, and current growth patterns indicate a steady growth in the next five years.

Currently, digital signage remains a more expensive, up-front investment, meaning it might be still out of reach for smaller end-users. However, as the technology becomes more affordable, so will digital signage options. Digital displays allow businesses to develop new, diverse ways of targeting their technology-savvy consumers and conversing with them in real time. In addition to marketing, digital technology can be also utilized to improve customer experience by supporting the customers' purchasing journey.

Digital printing:

A recent ISA Wide Format Print survey²⁶ indicated that digital printing has become the primary production method within the signage and graphic market. The sign manufacturers that were surveyed stated that digital printing represents more than half of their production and they expect that to grow in the next two years.²⁷ According to the Survey, the applications digital wide format printing is mostly used for are: Signs (64.1%); Banners (56.5%); Decals (35.3%); Vehicle Graphics (31.2%); Vehicle Wraps (29.4%); Backlit Displays (24.7%); Window Graphics (17.1%).

An important benefit associated with digital printing is that it allows for more efficient operating. Small shops are typically most affected by issues that impact cash flow. Digital printing enables more efficient operations as it allows the sign shops to better manage their inventory. "When shops are making signs by primarily cutting vinyl, they [need] to manage an inventory of many different colours of vinyl. Using digital printing, all the vinyl is white which means shops don't have to tie up their cash inventory."²⁸

What Now?

The convergence of new devices and technological advancements has shifted the boundaries of the traditional sign manufacturing industry. Many new players have joined the sign making business, thereby making it into an increasingly competitive landscape. Additionally, in the last decade, traditional sign shops have adopted many new technologies enabling them to create products that stretch beyond the boundaries of traditional signage.

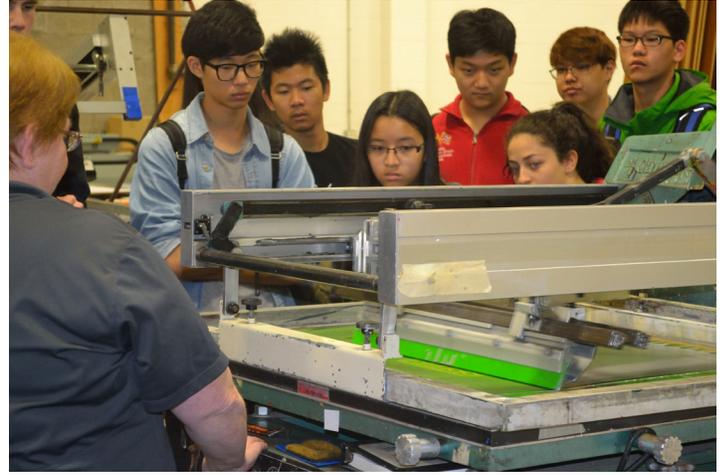
There is a lot of room for optimism for the Canadian sign industry. As a multibillion dollar industry, it is a strong contributor to the local and national economies. Even in times of economic downturn, the sign industry has performed more strongly than the manufacturing sector as a whole. Signage is here to stay. Businesses use signs to communicate their brand and messaging. As long as the sign shops stay current with the times and utilize the new technologies to optimize their efficiencies, they will be able to stay ahead of the curve.

One of the biggest areas of threats and opportunities for the sign industry is talent pool development. With very few formalized sign programs available

in high schools or colleges and with the anticipated baby boomer retirement wave in the next decade, there is a big need for skilled sign technicians and installers. Many school districts across Canada that had phased out shop classes over a decade ago, are recognizing the mistake and are starting to reintroduce these important vocational classes back in schools. The sign industry should seize this opportunity to introduce elements of sign making curriculum to school programs to demonstrate that it is an exciting and a viable career opportunity

The Sign Association of Canada is making a concerted effort to further the Canadian sign industry through a dialogue with planners, regulators, educators and members of the sign industry. In 2015, SAC-ACE held its first annual cross-Canada Road Show titled "From U₂ to Rock Star" to discuss the state of the Canadian sign industry. The need for new skilled talent was echoed across all seven Canadian SAC-ACE regions/chapters and as a result the association has formed a curriculum committee to work with Canadian schools to pilot new sign programs. With support from its committee and board members, SAC-ACE will continue taking a proactive leadership approach in furthering the sign industry's needs.

Sign Manufacturing Day



2015 Cross-Canada Road Show: From U₂ to Rock Star



Figure 10: Traditional Sign Manufacturing: Canada and by largest region. 29

Geography	Principal statistics	2004	2005	2006	2007	2008	2009	2010	2011	2012
Canada	Total revenue (x 1,000)	\$1,364,555	\$1,260,410	\$1,254,449	\$1,265,844	\$1,245,134	\$1,229,668	\$1,257,023	\$1,336,014	\$1,324,492
Canada	Total salaries and wages, direct and indirect labour (x 1,000)	\$380,361	\$369,571	\$378,838	\$372,121	\$381,039	\$392,308	\$387,269	\$408,852	\$395,438
Canada	Cost of materials and supplies (x 1,000)	\$569,294	\$501,270	\$484,347	\$540,535	\$502,093	\$483,968	\$497,085	\$525,436	\$524,150
Canada	Total number of employees, direct and indirect labour (persons)	9,007	8,089	7,898	8,010	8,210	8,837	8,958	9,251	8,913
Canada	Number of establishments	2390	1803	1718	1846	1869	1813	1863		
Quebec	Total revenue (x 1,000)	\$189,682	\$210,389	\$224,490	\$237,330	\$222,648	\$213,043	\$215,253	\$222,981	x
Quebec	Total salaries and wages, direct and indirect labour (x 1,000)	\$64,787	\$64,318	\$68,450	\$65,746	\$65,314	\$62,789	\$61,582	\$65,559	x
Quebec	Cost of materials and supplies (x 1,000)	\$93,026	\$99,108	\$104,814	\$108,778	\$97,577	\$87,365	\$89,971	\$92,594	x
Quebec	Total number of employees, direct and indirect labour (persons)	1,606	1,309	1,320	1,372	1,365	1,345	1,395	1,473	x
Quebec	Number of establishments	234	270	260	269	277	257	279		
Ontario	Total revenue (x 1,000)	\$762,365	\$612,406	\$574,110	\$538,511	\$528,485	\$506,585	\$525,898	\$585,410	\$607,455
Ontario	Total salaries and wages, direct and indirect labour (x 1,000)	\$182,799	\$163,780	\$159,048	\$150,513	\$151,485	\$152,984	\$155,227	\$166,985	\$175,363
Ontario	Cost of materials and supplies (x 1,000)	\$308,354	\$235,787	\$211,032	\$242,326	\$227,554	\$216,486	\$224,904	\$254,687	\$259,114
Ontario	Total number of employees, direct and indirect labour (persons)	4,033	3,252	3,173	3,093	3,119	3,209	3,324	3,542	3,641
Ontario	Number of establishments	1033	766	736	775	784	759	770		
Alberta	Total revenue (x 1,000)	\$123,521	\$132,156	\$145,501	\$162,262	x	\$183,766	x	x	x
Alberta	Total salaries and wages, direct and indirect labour (x 1,000)	\$39,241	\$42,843	\$46,886	\$47,747	x	\$61,474	x	x	x
Alberta	Cost of materials and supplies (x 1,000)	\$43,336	\$45,912	\$49,972	\$56,383	x	\$63,258	x	x	x
Alberta	Total number of employees, direct and indirect labour (persons)	1,021	1,116	1,063	1,061	x	1,432	x	x	x
Alberta	Number of establishments	235	233	219	247	245	237	249		
British Columbia	Total revenue (x 1,000)	x	x	\$156,233	x	\$193,371	x	x	x	x
British Columbia	Total salaries and wages, direct and indirect labour (x 1,000)	x	x	\$59,907	x	\$64,265	x	x	x	x
British Columbia	Cost of materials and supplies (x 1,000)	x	x	\$51,276	x	\$73,655	x	x	x	x
British Columbia	Total number of employees, direct and indirect labour (persons)	x	x	\$1,210	x	\$1,408	x	x	x	x
British Columbia	Number of establishments	413	292	276	301	306	304	308		

Legend x - Suppressed to meet the confidentiality requirements of the Statistics Act F - Too unreliable to be published

Endnotes

- ¹Please see Figures 2, 3 and 10 for the latest figures on the changing landscape of the Canadian sign industry
- ²"Economic and tax contributions of the US sign industry"(Prepared for the International Sign Industry), Ernst and Young (EY), June 15, 2014
- ³Industry Canada - Canadian Industry Statistics:
<https://www.ic.gc.ca/app/scr/sbms/sbb/cis/definition.html?code=33995> ;
<https://www.ic.gc.ca/app/scr/sbms/sbb/cis/definition.html?code=54185> ;
<https://www.ic.gc.ca/app/scr/sbms/sbb/cis/definition.html?code=323115> ;
<https://www.ic.gc.ca/app/scr/sbms/sbb/cis/definition.html?code=54189> Last accessed on July 24, 2015
- ⁴IBISWorld is one of the world's leading publishers of business intelligence, specializing in Industry research and procurement research.
- ⁵IBISWorld Industry Report 54143CA, March 2015 p10
- ⁶The data is from Statistics Canada as well as IBISWorld Research reports
Statistics for Digital Printing: Industry Canada - <https://www.ic.gc.ca/app/scr/sbms/sbb/cis/establishments.html?code=323115&lang=eng> – last accessed on July 10, 2015; Statistics for Display and Lettering Services: IBISWorld Industry Report54189CA, February 2015
- ⁷With the exception of number of businesses, all statistics are as of 2010.
- ⁸The data is from Statistics Canada as well as IBISWorld Research reports
- ⁹IBISWorld Industry Report 54185CA, April 2015 p10
- ¹⁰ISA State of the Industry 2015 Report, p 5
- ¹¹ISA State of the Industry 2015 Report, p5
- ¹²IBISWorld Industry Report 32311CA, February 2015 – expected revenue as of 2015
- ¹³IBISWorld Industry Report 32311CA, February 2015, p13
- ¹⁴IBISWorld Industry Report 54189CA, February 2015, p14
- ¹⁵IBISWorld Industry Report33995CA, April 2015, p18
- ¹⁶Statistics Canada – Using CANSIM Table 301-0006: "Principal statistics for manufacturing industries, by North American Industry Classification System (NAICS)" - <http://www5.statcan.gc.ca/cansim/a47> Last accessed on July 10, 2015
- ¹⁷IBISWorld Industry Report 33995CA, April 2015, p21
- ¹⁸Ibid, p22
- ¹⁹IBISWorld Industry Report 33995CA, April 2015 p16
- ²⁰Sign Media Canada, November 2014 pp76-80
- ²¹ISA State of the Industry Report 2015, p5
- ²²ISA State of the Industry Report 2015, p6
- ²³"Welders Make \$150,000? Bring Back Shop Class," Wall Street Journal, April 21, 2014: <http://www.wsj.com/articles/SB10001424052702303663604579501801872226532> (Last accessed on August 25, 2015)
- ²⁴"Why Schools Need to Bring Back Shop Class", Ken Robinson, Time, May 8, 2015: <http://time.com/3849501/why-schools-need-to-bring-back-shop-class/> (Last accessed August 25, 2015)
- ²⁵"Wide Format Print vs. Digital Display December", InfoTrends, 2013 p3
- ²⁶ISA Wide Format Print & Media Mix Survey, Part One
- ²⁷Ibid, p6
- ²⁸Ibid, p3
- ²⁹Statistics Canada – Using CANSIM Table 301-0006: "Principal statistics for manufacturing industries, by North American Industry Classification System (NAICS)" - <http://www5.statcan.gc.ca/cansim/a47> Last accessed on July 10, 2015

Special Thanks

Special thanks to the following companies whose signs we've featured in the document:

Advantage Signs; ATEC Signs; Curb Signs Inc.; Enseignes Plus; Hi Signs; Landale Signs; LookSharp Design; Mattatall Signs; Pattison Sign Group; Provincial Sign Systems; Signex Manufacturing.

Also special thanks to:

Bill Kovacevic for sharing photos of signs from 1920's and 1960's from his private collection; City of Edmonton for sharing their picture of the Canadian National Railway Neon Sign; Arthur Stanway Collection/ Montreal Signs Project for their Stengers Ford sign picture; Colortec and Mattatall Signs for Sign Manufacturing Day pictures; and Sign Media for their Dundas Square picture.

Sign Association of Canada

ABOUT US

Since 1955 the Sign Association of Canada has successfully promoted the welfare of the sign industry, improved the status of its members in the community and benefited the users of signs. However the traditional boundaries of the sign industry have expanded due to the rapidly changing level of technology and the evolution of the commercial marketplace. The Sign Association of Canada has recognized these trends and has advanced to partner with related industries and sectors that use, design and manufacture commercial images.

There are many changes and enhancements being implemented at SAC-ACE over the next 12 to 18 months. From new value added member service programs and increased marketing initiatives for our members, to the development of additional accredited training courses and a more proactive approach in dealing with governmental and regulatory issues. SAC-ACE is poised to better lead our industry into the next decade.

3 REASONS YOUR COMPANY SHOULD JOIN SAC

1. Increase Your Profit and Protect Your Sustainability

How often are you able to step away from your shop to connect with your peers and learn about what is happening in our industry that may impact your business? As a SAC-ACE member, you get resources, information and education to help your company be more profitable, more sustainable, more productive, more credible and more competitive.

2. Get Inside Information

SAC-ACE works with regulators across Canada to ensure a fair and transparent business environment for you to serve your clients. As a SAC-ACE member, you have a seat at the table and inside information about the direction of the regulatory environment. You also have direct access to SAC's Director of Government Affairs.

3. Be Part of the Bigger Picture

All sign company members receive complimentary membership with the International Sign Association. ISA is the largest community of sign companies, service providers, and end-users in the world. This is a tremendous source of resources and education for you and your employees. www.signs.org.



1 Yonge Street, Ste. 1801 Toronto ON M5E 1W7 • 905-856-0000 • info@sac-ace.ca

www.sac-ace.ca