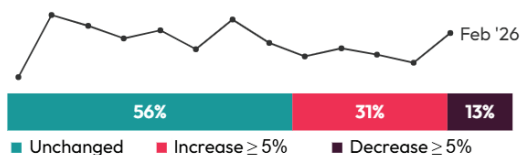


FEBRUARY LABOR MARKET SLOWS

AVIXA®, the Audiovisual and Integrated Experience Association, has published the monthly Pro AV Business Index since September 2016, gauging sales and employment indicators for the pro AV industry. The index is calculated from a monthly survey that tracks trends. Two diffusion indexes are created using the survey: the AV Sales Index (AVI-S) and AV Employment Index (AVI-E). The diffusion indexes are calculated based on the positive response frequency from those who indicated their business had a 5% or more increase in billings/sales from the prior month plus half of the neutral response. An index of 50 indicates firms saw no increase or decline in business activity; more than 50 indicates an increase, while less than 50 indicates a decrease.

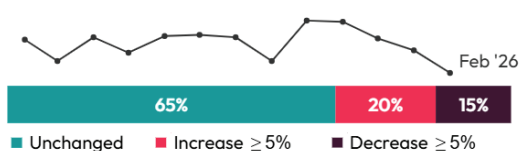
SALES INDEX FEBRUARY 2026

58.9



EMPLOYMENT INDEX FEBRUARY 2026

52.5



“In the middle of spring semester here at Boston College. We are operating at full capacity; booked solid with events. We have some projects coming up that we are working of for the summer.”

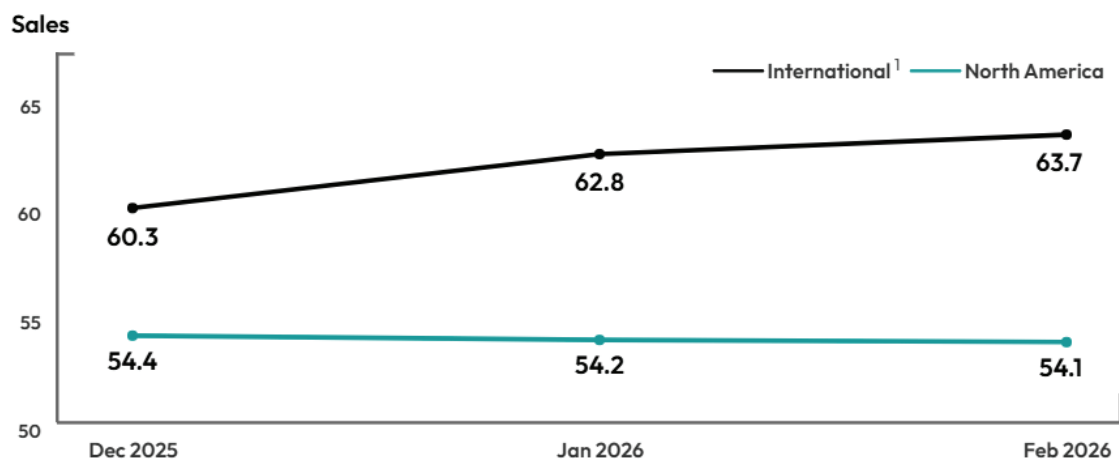
- NORTH AMERICA, END USER

HIGHLIGHTS:

- The AV Sales Index (AVI-S) for February increased to 58.9 from 55.6. Even with inflation and the current instability of political situations, the pro AV market remains strong and almost 5 points above February of 2025. Future pipelines are looking strong. Historically February sees corporate Q1 technology rollouts, education sector RFP and procurement cycles beginning, live events preparing for spring/summer peak seasons. These sectors were suppressed early in January and thus poised for an uptick.
- While the U.S. Supreme Court overturned President Trump’s sweeping tariffs, most respondents to the February survey do not expect this to have any effect on their business. Prices that have been raised are not expected to be lowered, but respondents are hoping for no increase over the next year or two. With the back and forth on tariffs, many remain unsure of how the year will play out.
- The January AV Employment Index (AVI-E) dropped again to 52.5 in February. U.S. and global labor markets both show cooling while employers struggle to find skilled workers. The American market cut 92,000 jobs in February.

INTERNATIONAL OUTLOOK

The North American AVI-S remained consistent at 54.1. Over the past year, the non-North America sales index has shown rapid growth, with the preliminary February sales index at 63.7 reflecting strong demand and positive sentiment from international companies. Many regions are experiencing conditions that support AV spending, for example the European government is modernizing infrastructure that includes digital communication learning environments and collaborative technologies. The winter Olympics in Italy surely helped increase AV spending in that region over the past year



Global regional indexes are three-month moving averages (based on prior, forward and current months) due to relative small ample size.

¹ International regions include Europe, Latin America, Middle East/Africa, Asia-Pacific

² Due to the small sample, the North American and International indexes are based on a 3-month moving average. The February 2026 index is preliminary, based on the average of January 2026 and February 2026 and will be final with March 2026 data in the next report.

“Q1 is usually slower for our supply sales as everyone stocked before the holidays to ensure they have enough lamps, tape, etc to get through seasonal shows and events, however Q1 is also where we do a lot of the install work that has been planned in Q2-4 of the previous year. Tariffs continue to be concerning it’s difficult to forecast pricing for future projects, and Chinese New Year closing all business in China means we have to pre-plan and pre-purchase what we think we may need for the rest of the quarter until they return to manufacturing and shipping.”

- NORTH AMERICA, AV PROVIDER

METHODOLOGY

The survey behind the AVIXA Pro AV Business Index was fielded to approximately 2,000 members of the AVIXA Insights Community between February 26, 2026, and March 4, 2026. A total of 289 AV professionals completed the survey. Only respondents who are service providers and said they were “moderately” to “extremely” familiar with their company’s business conditions were factored in index calculations. The AV Sales and AV Employment Indexes are computed as diffusion indexes. The monthly score is calculated as the percentage of firms reporting a significant increase plus half the percentage of firms reporting no change. Comparisons are always made to the previous month. Diffusion indexes, typically centered at a score of 50, are used frequently to measure change in economic activity. If an equal share of firms reports an increase as reports a decrease, the score for that month will be 50. A score higher than 50 indicates that firms, in the aggregate, are reporting an increase in activity that month compared to the previous month. In contrast, a score lower than 50 is a decrease in activity.

“Mostly, it’s keeping up with demand and hiring enough qualified installers and technicians. We have more business than we can handle right now. It’s a good problem to have except when you can’t complete projects in the timeframe that the customer desires.”

– NORTH AMERICA, AV INTEGRATOR

ABOUT THE AVIXA INSIGHTS COMMUNITY

The AVIXA AV Intelligence Panel (AVIP) is now part of AVIXA’s Insights Community, a research group of industry volunteers willing to share their insights on a regular basis to create actionable information. Members of the community are asked to participate in a short, two-to-three-minute monthly survey designed to gauge business sentiment and trends in the AV industry. Community members will also have the opportunity to participate in discussions, polls and surveys.

Community members will be eligible to:

- Earn points toward online gift cards
- Receive free copies of selected market research
- Engage directly with AVIXA’s market intelligence team to help guide research
- Ask and answer other industry professionals’ questions

The Insights Community is designed to be a global group, representative of the entire commercial AV value chain. AVIXA invites AV integrators, consultants, manufacturers, distributors, resellers, live events professionals, and AV technology managers to get involved. If you would like to join the community, enjoy benefits, and share your insights with the AV industry, please apply at avip.avixa.org.