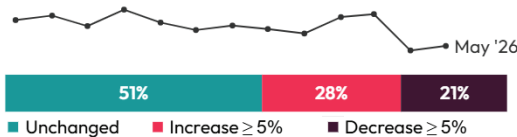


## MAY REMAINS FLAT

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.

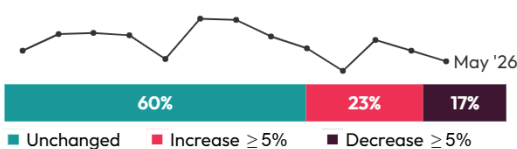
### SALES INDEX MAY 2026

53.1



### EMPLOYMENT INDEX MAY 2026

53.3



“Enrollment is down and currently in a 3yr strategic plan that is reducing costs across all areas of the university and campuses.”

- NORTH AMERICA, EDUCATION

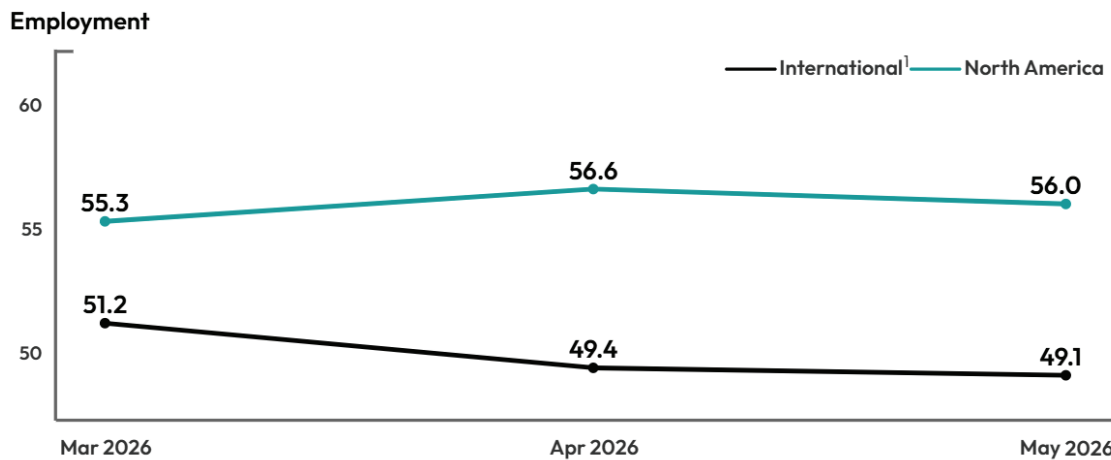
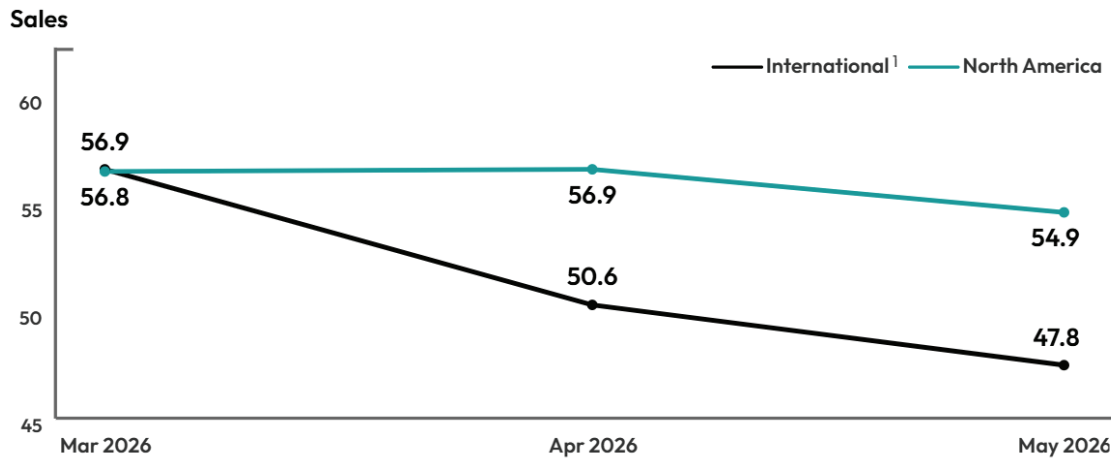
## HIGHLIGHTS:

- The AV Sales Index (AVI-S) for May increased one point to 53.1. 75% of integrators said they have been working on corporate office spaces, which often sees a mid-year spending push when budget remains. While new construction was essentially flat to declining for May, spend continued in remodels. College enrollment from 2026 – 2027 is showing a modest growth, in turn some are seeing less spending in higher education.
- While the industry is seeing slight expansion, providers are feeling the negative effects of the economy. General economic instability, including inflation, rising costs, and recession fears continue to be of concern. 21% said rising costs and inflation were a challenge for May.
- The May AV Employment Index (AVI-E) dropped one point to 53.3. Respondents say they are having difficulty finding and retaining qualified staff, hiring freezes, and labor shortages. This includes challenges with talent development, employee retention, and filling vacancies. However, the U.S. labor market showed renewed momentum after a softer stretch, with May marking one of the strongest gains in recent months. Growth was concentrated in a few service sectors, while overall conditions remained steady rather than rapidly accelerating.

## INTERNATIONAL OUTLOOK

The preliminary North American AV Sales Index (AVI-S) continued to rise over one point to 55.6 in May, while the non-North American Sales index had no change at 47.8. Internationally trade uncertainty and slowing exports are affecting 2026 momentum.<sup>2</sup> The demand remains but it is more delayed, fragmented, and risk-sensitive than in the U.S.

On the employment side, the preliminary North American AVI E remained steady at 56.4. The non North America AVI E dropped to 47 showing contraction for May.



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

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

<sup>2</sup> Due to the small sample, the North American and International indexes are based on a 3-month moving average. The May 2026 index is preliminary, based on the average of April 2026 and May 2026 and will be final with June 2026 data in the next report.

“Slowing of the construction market has created a more competitive market resulting in lower margins to win projects.”  
**- NORTH AMERICA, AV INTEGRATOR**

## METHODOLOGY

The survey behind the AVIXA Pro AV Business Index was fielded to approximately 2,000 members of the AVIXA Insights Community between May 26, 2026, and June 4, 2026. A total of 279 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.

“Tariff and higher fuel costs affect procurement budgets. Cuts in USA Federal Grants for – Education, Healthcare, Climate related Science and Technology funding, and concern with Transportation and Infrastructure reductions affect client procurement opportunities.”

– ASIA-PACIFIC, 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](http://avip.avixa.org).