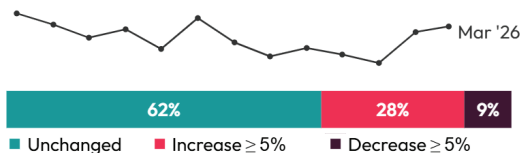


## MARCH: DEMAND HEALTHY DESPITE INCREASING COSTS

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.

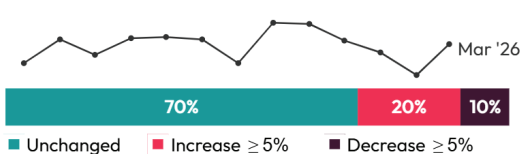
### SALES INDEX MARCH 2026

59.5



### EMPLOYMENT INDEX MARCH 2026

55.1



“Construction projects have dropped off significantly which is greatly impacting potential projects. It has also resulted in a more competitive bidding space which is driving down potential project margins.”

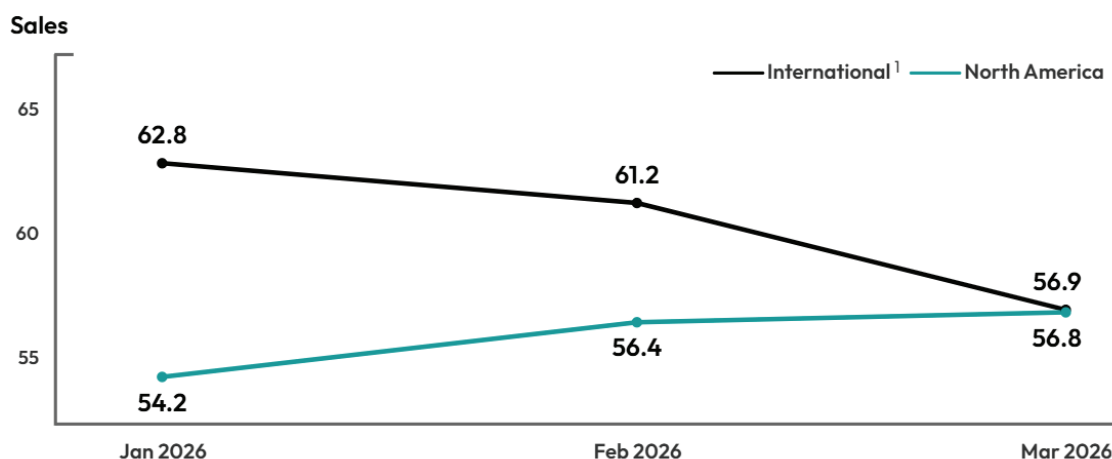
- NORTH AMERICA, AV INTEGRATOR

## HIGHLIGHTS:

- The AV Sales Index (AVI-S) for March increased slightly to 59.5, this is consistent with March of 2025. This figure suggests that the underlying demand remains healthy despite the political situation and raising cost concerns.
- The most common theme for March is by far increasing costs (21%), including higher prices for AV equipment, components, fuel, shipping, energy, and labor. Many respondents explicitly cite inflation, tariffs, and vendor price increases as directly squeezing margins, delaying purchases, or forcing project scaling and longer replacement cycles. Even organizations reporting stable demand note that profitability and budgeting are under pressure.
- The March AV Employment Index (AVI-E) increased from 52.5 to 55.1 in March. The U.S. labor market rebounded in March 2026, adding jobs at a pace well above expectations after a weak February. However, underlying conditions remain subdued, with slow hiring, easing wage growth, and a shrinking labor force signaling a low hire, low fire environment rather than renewed expansion.

## INTERNATIONAL OUTLOOK

The preliminary North American AV Sales Index (AVI S) remained steady 56.8 in March, while the non North America sales index dropped to 56.9. Sales activity remains positive but constrained. Many end users outside North America continue to focus on a “replace and optimize” strategy, prioritizing upgrades and maintenance over large scale greenfield AV projects. Heightened budget scrutiny across corporate, government, and education sectors is limiting the pace of sales acceleration. On the employment side, both the North American AVI E (55.1) and non North America AVI E (51.2) indicate expansion in March, although gains in faster growing regions are partially offset by slower conditions in parts of Europe and Latin America.



*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 March 2026 index is preliminary, based on the average of February 2026 and March 2026 and will be final with April 2026 data in the next report.

“Economic conditions affecting our industry are experienced by all of us. Rising fuel costs impact shipping, fleet operation, and personal expense budgets. Equipment and material costs affected by tariffs remain in flux, while our distributors and manufacturers do all that they can to support business opportunities.”

- ASIA-PACIFIC, 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 March 26, 2026, and April 6, 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.

“Hybrid Work & Meeting Technology Demand The shift to hybrid work has significantly increased demand for reliable AV infrastructure. More employees working remotely means conference rooms need seamless video conferencing (Zoom, Teams, Webex), and any downtime directly impacts client meetings, investment team collaboration, and executive presentations. As an AV tech, I’ve seen tighter scrutiny on equipment refresh cycles, vendor contracts, and staffing levels. Requests for new technology need stronger business justification than before install.”

– NORTH AMERICA, END USER

## 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).