Monthly Survey Results

NOVEMBER 2024
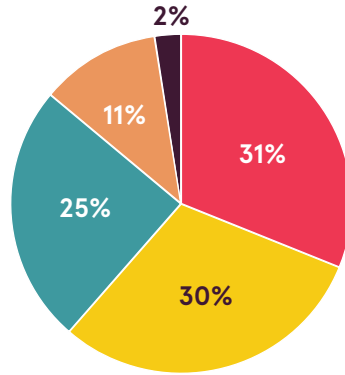
Total respondents = 297

Where is your company's headquarters located?
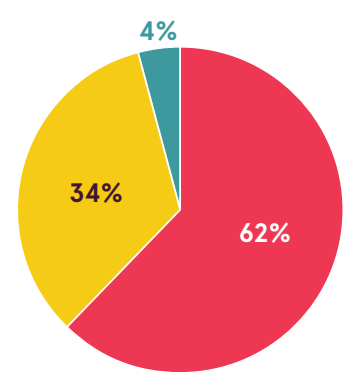
4% 3%
10%
10%
73%
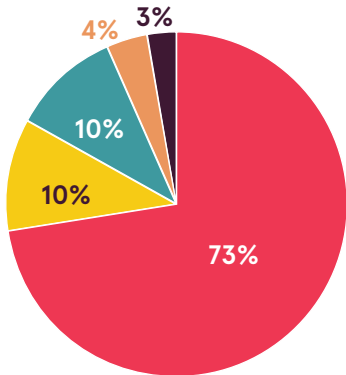
- ■ Middle East/Africa
- ■ Latin America
- ■ Europe
- ■ Asia–Pacific
- ■ North America

How familiar are you with your business's conditions (sales, billings, workforce, etc.)?

2%
11%
25%
30%
31%

- ■ Not familiar at all
- ■ Slightly familiar
- ■ Moderately familiar
- ■ Very familiar
- ■ Extremely familiar

Which one BEST describes the PRIMARY business of your company.

4%
34%
62%

- ■ Other
- ■ We are clients (end users) of AV products, services or applications (e.g., schools, hospitals, retail, hotels, government, etc.)
- ■ AV provider (integrator, manufacturer, distributor, service provider, live events, designer, etc.)

Which of the following closest matches the industry you work in?

Industry	%	Industry	%
Architecture, Engineering, Planning, Design	7%	Hospitality/Gaming	1%
AV Integration/Installation	40%	Independent/Manufacturer Rep	1%
Broadcast/Media	1%	IT Integration/ Installation	3%
Business Consulting	2%	Manufacturer	4%
Content Creation/Management	0%	Meeting/Event Planning	0%
Creative/Advertising/PR Agency	0%	Religious Organization	1%
Distributor/Reseller/Dealer	3%	Rental/Staging/Live Events Production	3%
Education	25%	Retail/Restaurant	0%
Energy/Utilities	0%	Software Dev./Ind. Programming	1%
Entertainment	1%	Sports/Venues	0%
Experience Design Consulting	0%	Transportation	0%
Finance/Legal/Real Estate	2%	Video/Film Production	0%
Government/Military	2%	Other	1%
Hospital/Healthcare	2%		

How many people work for your company?

1	5%	10 – 19	7%	250 – 499	7%
2 – 4	6%	20 – 49	12%	500 – 999	9%
5 – 9	8%	50 – 99	8%	1,000 or more	27%
		100 – 249	11%		

## Which of the following environments-vertical markets have you worked in over the past 12 months? Choose all that apply.

|	
Corporate office spaces	70%
Education-training spaces	68%
Live events spaces of any type	33%
House of worship	33%
Hotels-accommodations of any type	31%
Healthcare-hospitals	30%
Entertainment spaces (museums, theme parks, etc.)	30%
Restaurants-bars	29%
Retail spaces	27%
Sports venues	26%
Media recording and transmission (including TV, radio, movies, podcasts, etc)	25%
Transportation	22%
Other, please specify:	4%
None of the above	3%

ASKED OF PROVIDERS

Compared with the previous month, have the billings sales at your location...
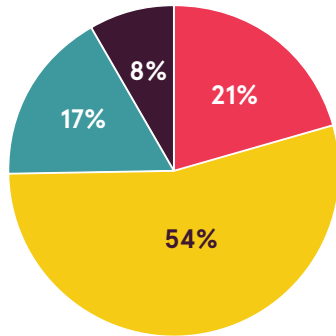
8%
21%
17%
54%

- Don't Know
- Decreased significantly (5 percent of more)
- Remained Unchanged
- Increased significantly (5 percent of more)

ASKED OF PROVIDERS

Compared to the previous month, is the overall employment at your location...

3%
11%
17%
69%
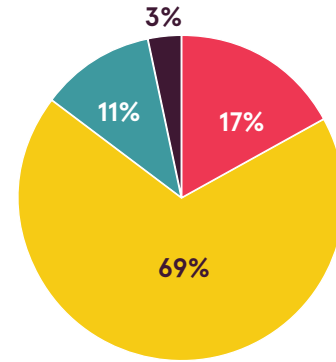
- Don't Know
- Less than a month ago
- Same as a month ago
- Greater than a month ago

ASKED OF END USERS

Compared to the previous month, have your organization's overall expenditures on AV products...

3% 3%
14%
79%

- Don't Know
- Decreased significantly (5 percent of more)
- Remained Unchanged
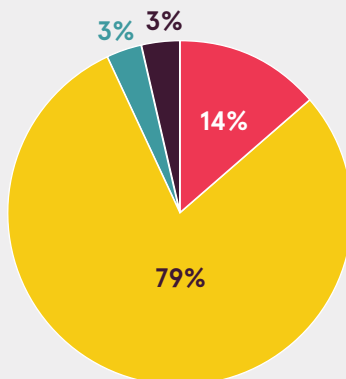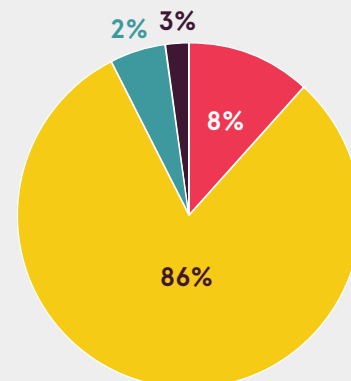- Increased significantly (5 percent of more)

ASKED OF END USERS

Compared to the previous month, is the AV employment at your location...

2% 3%
8%
86%

- Don't Know
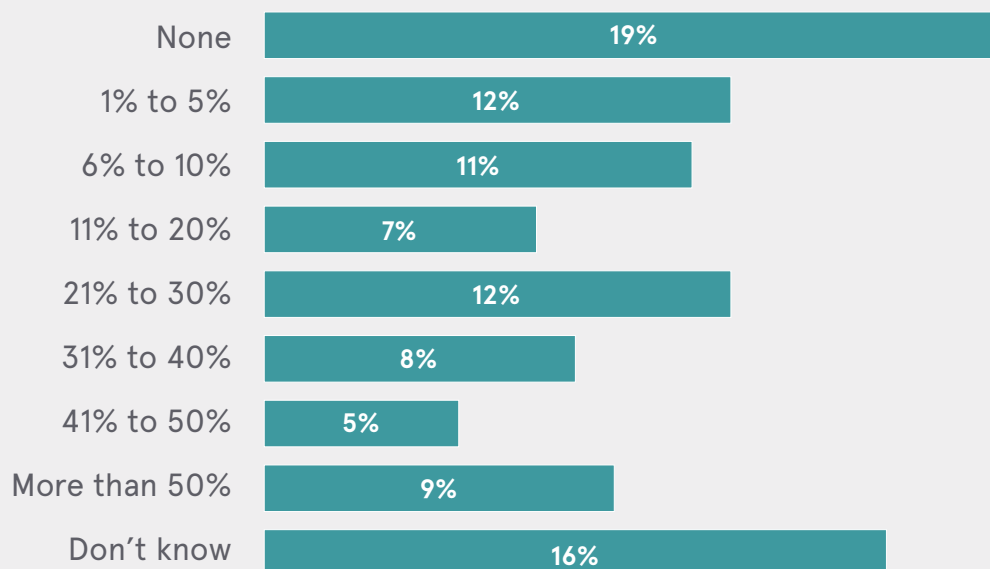- Less than a month ago
- Same as a month ago
- Greater than a month ago

What has been your most significant business challenge over the past month?

|	
Hiring new employees	12%
Rising costs-inflation	11%
Meeting existing demand	11%
Seasonal trends	9%
Political situation	9%
Slowing prospect pipeline	8%
Recession-business cycle	8%
Supply constraints- delays and lack of availability	6%
Retaining existing employees	4%
COVID - 19	0%
Other – Specify	3%
We have not had any significant challenges	18%

ASKED OF THOSE WHO WORK ON LIGHT COMMERCIAL PROJECTS

What percentage of your company revenues would you estimate come from light commercial projects?

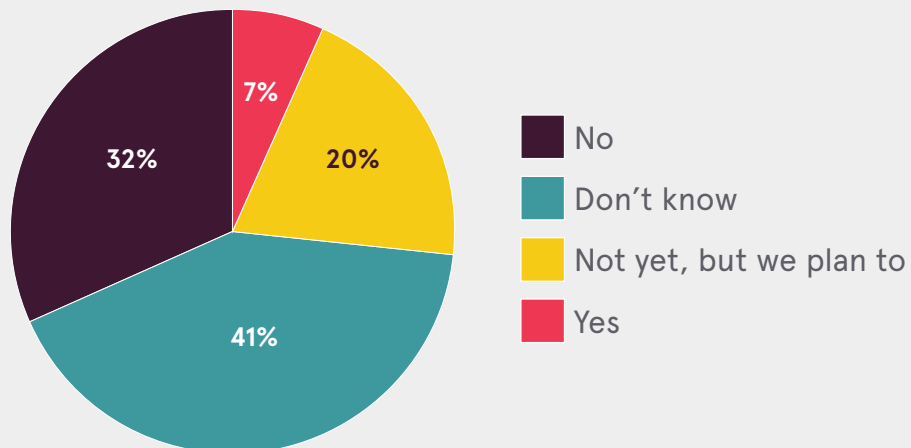|	
None	19%
1% to 5%	12%
6% to 10%	11%
11% to 20%	7%
21% to 30%	12%
31% to 40%	8%
41% to 50%	5%
More than 50%	9%
Don't know	16%

ASKED OF THOSE WHO WORK ON LIGHT COMMERCIAL PROJECTS

What percentage of the light commercial revenues come from ANY COMBINATION of the following use cases?: Background Music, TV Audio, Real-time Voice and Music, Paging
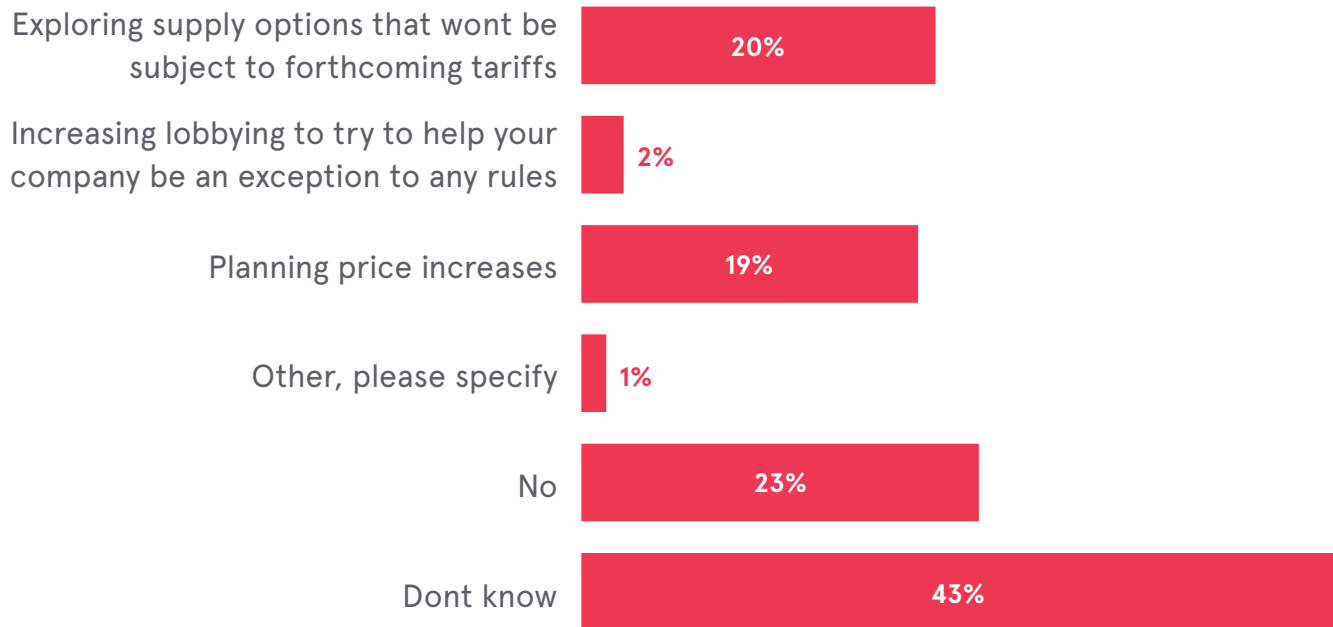

30%
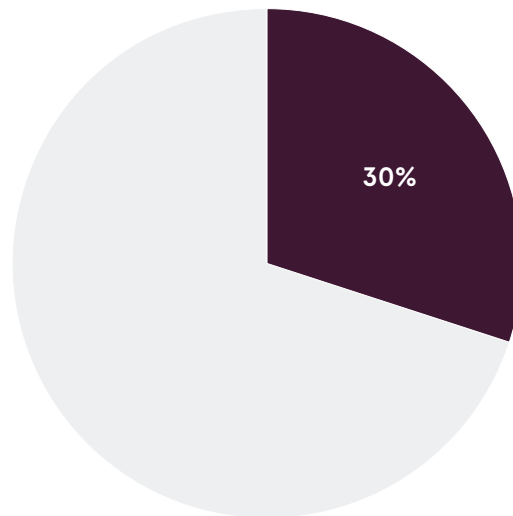
Is your company stocking up on supplies due to concerns about possible forthcoming tariffs? Please answer yes only if the reason for stocking up is related to tariffs.

7%

32%

20%

41%

- No
- Don't know
- Not yet, but we plan to
- Yes

Is your company taking any additional steps to reduce its tariff liability? Select all that apply.

Exploring supply options that wont be subject to forthcoming tariffs	20%
Increasing lobbying to try to help your company be an exception to any rules	2%
Planning price increases	19%
Other, please specify	1%
No	23%
Dont know	43%

Is your company stockpiling supplies for any of the following reasons? Select all that apply.

Upcoming projects that are already contracted	24%
Budget-fiscal cycle	17%
Upcoming increase in project work (anticipated but not contracted)	12%
Supply chain concerns (excluding tariffs)	11%
Inflation concerns (excluding tariffs)	8%
Other, please specify	1%
No	42%
Dont know	16%

These survey responses have been collected from AVIXA's Insights Community. 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 here.