CEPro ADVANTAGE SERIES

2017 BRAND ANALYSIS

EXPANDING + EVOLVING

2017 BRAND ANALYSIS: EXPANDING + EVOLVING

Riding a wave of interest fueled by web-based technologies, including streaming media and networked services, CE Pro 100 dealers are driving increased revenues through adoption of a new era of solutions.

BY ROBERT ARCHER

THANKS TO A NUMBER of influences, the custom electronics industry hasn't experienced consistent growth like it's currently enjoying in roughly a decade. Sure, business models have evolved and dealers are relying less on high-margin products these days to build their revenues, but the important fact is that business is good.

Plus, popular mainstream brands are continuing to bring greater consumer awareness to categories such as automation, whole-house audio, security and more.

The 2017 CE Pro Brand Analysis shows that integrators are using a wide variety of products to satisfy increased consumer demand for streaming media systems, voice-controlled automation systems, and robust networks that are capable of supporting today's bandwidth-reliant entertainment technology.

This year's Brand Analysis also represents the largest-ever product study based on the CE Pro 100 — the annual rankings of the highest revenue integrators — in *CE Pro* history. Some of the new categories within the 55 being reported this year include fiber-optic cable, voice control, video doorbells and business management software.

On the following pages you'll find the leading brands for each of the 55 categories that make up the 2017 CE Pro 100 Brand Analysis. See how your preferred vendors fared, which companies are on the rise and which ones you may look to consider adding to your portfolio. Keep in mind that these numbers reflect but a fraction of the thousands of custom integrators out there, and that the CE Pro 100 companies were asked to limit their selections to their top three vendors in each category.

2017 BRAND LEADERS

2017 'BULLET' BRANDS SURGE

Starting in 2016 CE Pro decided to highlight several companies within its CE Pro 100 Brand Analysis that managed to move up the charts "with a bullet," as it's said. As with last year, we've singled out a handful of vendors that stood out because of a particularly nice bump in dealer mentions. Below are a sampling of some top "bullet" upward movers.

Loudspeakers (Freestanding/Bookshelf): Wireless audio favorite **Sonos** went from missing the top five in the in-room loudspeaker category last year to third place with nearly a quarter of the CE Pro 100 (24 dealers) mentioning it as a standalone speaker solution — likely sprinkling Sonos in multiple rooms of houses.
Audio Amplifiers: After leading this category last year, **Sonance** still managed to nearly double its total, going from 22 percent to 41 percent as whole-house music systems proved to be bread-and-butter solutions. Similarly, **Control4** rose from 16 percent to 39 percent.
Outdoor Audio: Continuing to make strides, **Origin Acoustics** found a sweet spot among dealers' outdoor audio solutions going from 13 mentions last year to 30 this year.
TV Displays: Integrators seem to be capitalizing on premium solutions as **LG** rose from 40 percent to 58 percent. The manufacturer has been heavily focused on pricier OLEDs.
Projectors: In what must be a positive sign for 4K video projection, category leader **Sony** and its selection of affordable and premium Ultra HD offerings increased its dealer tallies from 69 percent last year to a whopping 81 percent his year.
Blu-ray Disc Players: Another good note for the impact of 4K and increasing content options for consumers, high-performance disc player provider **Oppo** went from just outside the top five to garnering 27 percent of the CE Pro 100.
Whole-House Automation: The tie-in between automation and security systems is even more evident these days. Case in point is **Alarm.com**, which surged into the top five.
Remotes/Interfaces/Smart Devices: How integral is **Apple** for customers' ability to easily command their control and A/V systems? The company jumped into the category lead.

BRAND LEADER: AUDIO

Loudspeakers *(Floorstanding/Bookshelf)*: Klipsch
Architectural Speakers *(In-Wall/In-Ceiling)*: Sonance
Acoustic Treatments: SnapAV
Audio Amplifiers: Sonance
A/V Receivers: Sony
HT Preamp Processors: Integra
Outdoor Audio: Sonance
Soundbars: Sonos
Wireless Audio: Sonos
Media Servers/Streaming Devices: Kaleidescape
Subwoofers: Sonos
Turntables: Pro-Ject, Thorens
Speaker Cable/Interconnects: Binary (SnapAV)
Headphones: Sennheiser
Multiroom A/V Distribution Systems: Control4

BRAND LEADER: VIDEO

TV Displays: Sony
Projectors: Sony
Projection Screens: Stewart Filmscreen
Outdoor Video: SunBriteTV (SnapAV)
HDMI Cables: Binary (SnapAV)
Gaming Systems: Microsoft
Blu-ray Disc Players: Sony
Video Distribution Switchers/Extenders: Control4
Satellite TV: DirecTV

BRAND LEADER: NETWORKING/CONNECTIVITY

Home Networks: Pakedge (Control4)
Networking Cable: Wirepath (SnapAV)
Structured Wiring: Wirepath (SnapAV)
Phone Systems/Intercoms: Panasonic
Cellphone Boosters: Wilson Electronics
Fiber Optic Cable: Cleerline

BRAND LEADER: CONTROL & AUTOMATION

Whole-House Automation: Control4
Lighting Control: Lutron
Remotes/Interfaces/Smart Devices: Apple
Motorized Window Treatments: Lutron
IR Distribution Systems: Binary (SnapAV)
HVAC Control: Control4

BRAND LEADER: HOME ENHANCEMENTS

Racks: Middle Atlantic
Rack Cooling Systems: Middle Atlantic
Remote Managed Services: OvrC (SnapAV)
Seating: CinemaTech
Mounts: Strong (SnapAV)
Lifts: Future Automation
Furniture: Salamander Designs
Central Vacuum: H-P Products/Dirt Devil/Vacuflo
Power conditioners: WattBox (SnapAV)
Voice Control: Amazon

BRAND LEADER: SECURITY

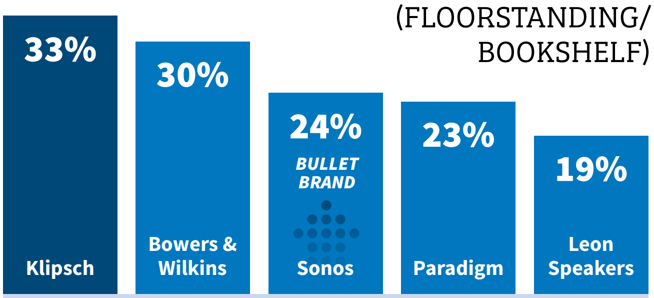
Intrusion/Fire Control Panel: Honeywell
Cameras: IC Realtime
Access Control: Control4
Smart Door Locks/Dead Bolts: Yale
Video Doorbells: Ring

DEALER SUPPORT

Tools & Testers: Fluke Networks
General Distribution: ADI
Design Proposal Software: D-Tools
Business Management Software: Intuit

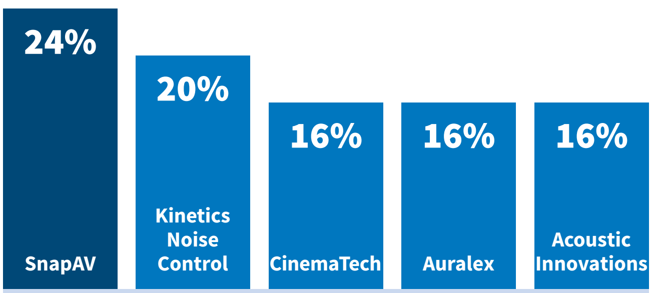
Loudspeakers

(FLOORSTANDING/ BOOKSHELF)



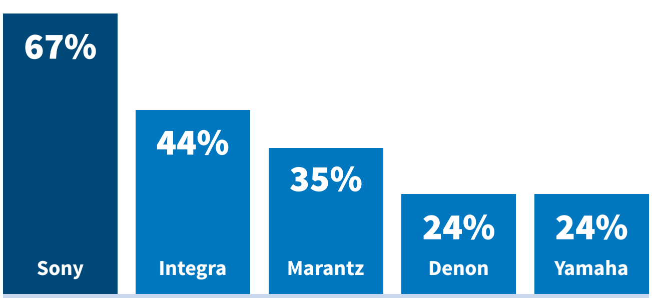
Sonos' impact as a provider of wireless whole-house audio solutions can be seen in the freestanding speaker category. Joining perennial leaders Klipsch, B&W and Paradigm, Sonos jumps into the top three and Leon into the top five. Overall the category grew more concentrated with the leaders grabbing more market share.

Acoustic Treatments



Acoustic treatments experienced a major surge in usage by CE Pro 100 dealers. For the second year in a row SnapAV leads the category followed closely by Kinetics Noise Control. CinemaTech, Auralex and Acoustic Innovations round out the top five, all double-digits ahead of the nearest competitor.

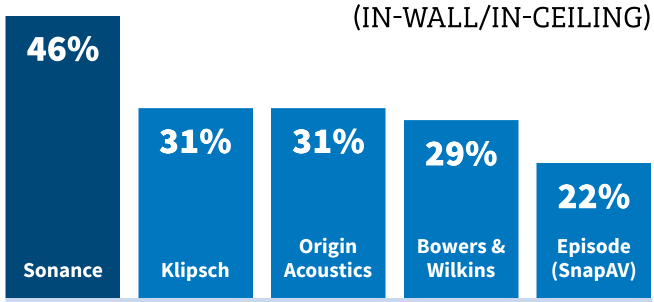
A/V Receivers



Sony increases its lead over Integra from the previous year, and the order of the top three companies remains the same as past years. Overall the A/V receiver category is growing, but not at the same rate as the whole-house audio and speaker categories.

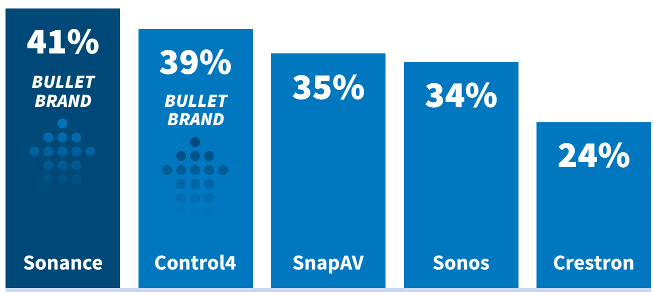
Architectural Speakers

(IN-WALL/IN-CEILING)



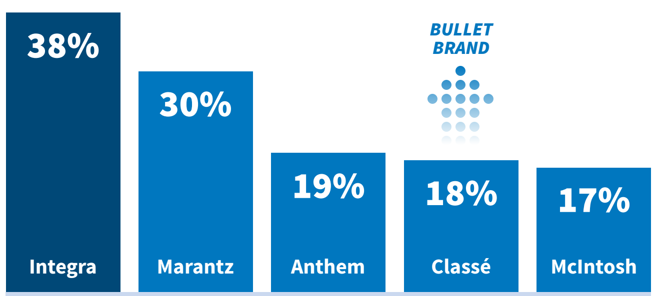
Audio's diverse popularity is driving more dealers to offer both architectural and freestanding speakers. Making the biggest gains over the past year are Origin Acoustics and Episode, while Sonance adds five and paces the category again. Episode grew approximately 45 percent, while Origin nearly doubled its dealer share.

Audio Amplifiers



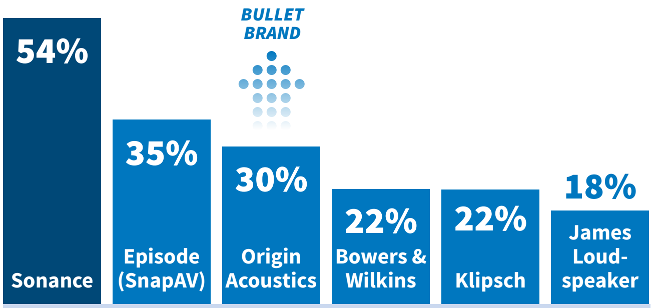
Highlighting the popularity of multiroom audio, whole-house audio amplifier manufacturers Sonance, Control4, SnapAV, Sonos and Crestron dominate the rankings while home theater and separates manufacturers Marantz, Integra, Rotel and Sony just miss the top five. The leaders here all made impressive gains.

HT Preamp Processors



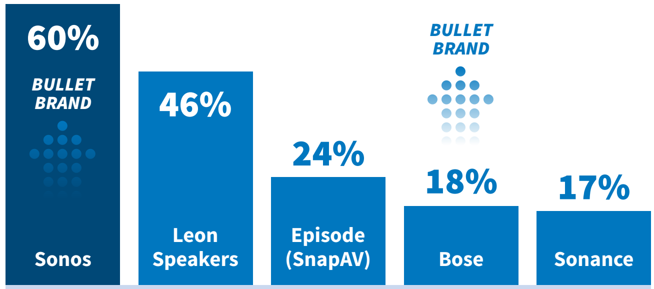
Like the other audio categories, the HT Preamp Processor segment growth has upped competition, too. In a tight cluster, Integra leads but is followed closely by Marantz, Anthem, Classé and McIntosh. Classé jumps into the top five brands, while Sony with 16 dealers and Rotel at 15 narrowly miss.

Outdoor Audio



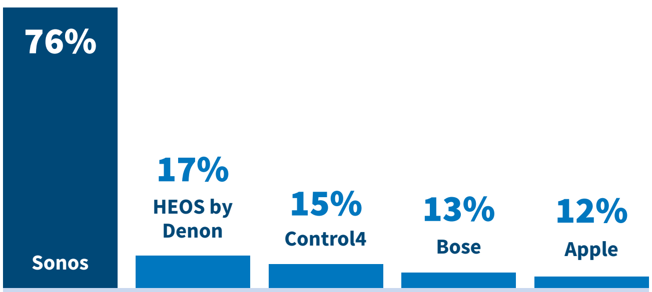
Outdoor audio is a popular extension of whole-house A/V and as standalone systems that include home theaters. Venerable manufacturer Sonance maintains a strong leadership showing with its variety of rugged speakers, while Origin Acoustics has offered a compelling line of solutions to become a force in the category in just three years.

Soundbars



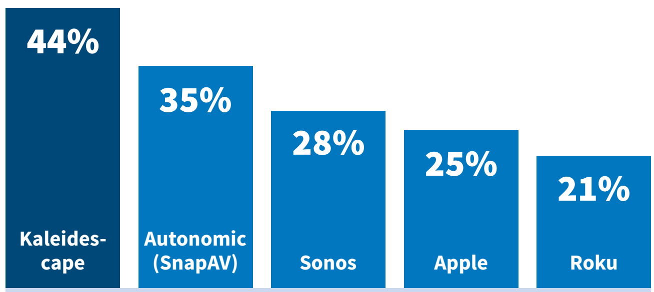
Sonos increases its lead to cement its position as the most used soundbar by the CE Pro 100. The rest of the top five also made sizeable gains among dealers using their respective products. Klipsch fell out of the top five, while Bose almost doubled its dealer representation.

Wireless Audio



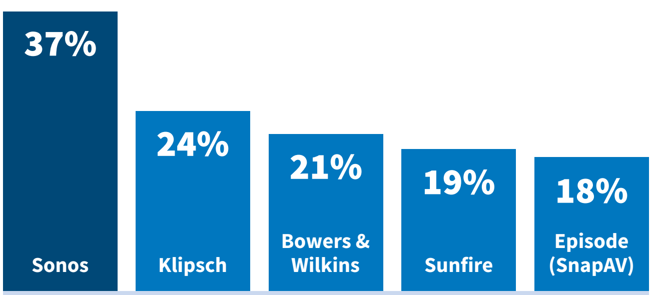
The top two wireless companies' numbers remain roughly the same as the previous year. Making a big jump into the top five is Control4. Bose doubles its dealer share from the previous year and Apple triples its dealer representation to enter the leading five.

Media Servers/Streaming Devices



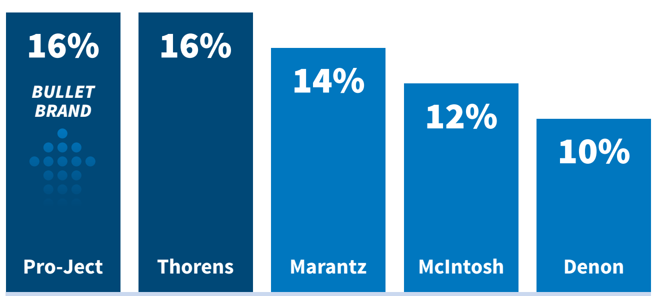
Flip-flopping positions with almost identical numbers from 2016, Kaleidescape reclaims the top position in the Media Servers/Streaming Devices category. Falling out of the top five brands are TiVo and Crestron, whose CE Pro 100 numbers stagnated to drop them behind the mainstream products from Apple and Roku.

Subwoofers



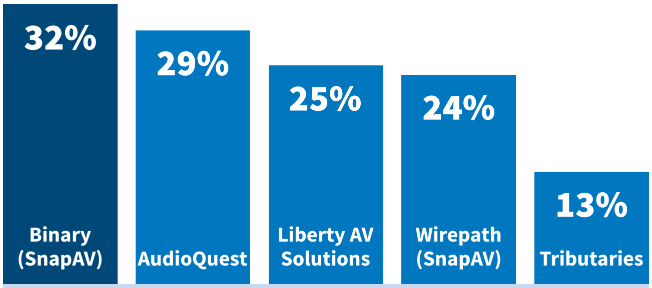
Subwoofers is a new category for the Brand Analysis. Sonos debuts as the leader, likely riding the popularity of its soundbars and wireless whole-house audio capabilities. Klipsch, B&W and Episode make strong showings, and Sunfire garnered much support perhaps fueled by its selection of smaller-footprint solutions.

Turntables



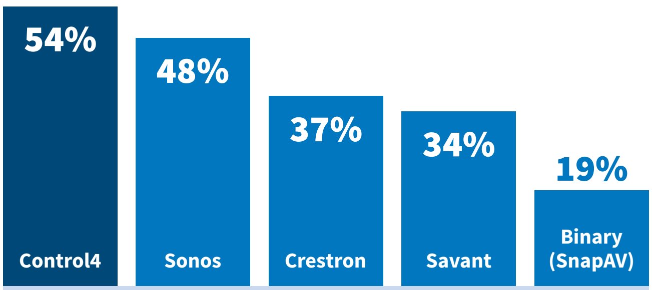
A good sign for stereo sales and proving the popularity of vinyl's resurgence extends beyond Millennial hipsters, each of the top five companies saw its CE Pro 100 numbers increase from 2016. Pro-Ject makes a big move into the top spot by more than doubling its numbers.

Speaker Cables/Interconnects



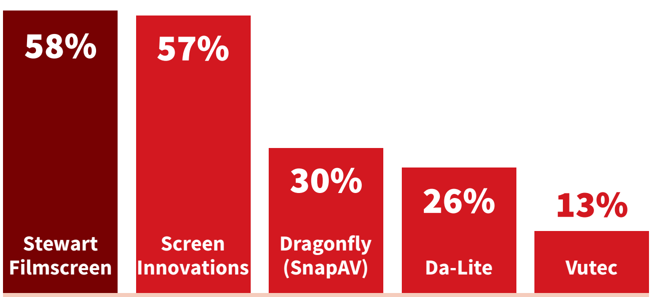
After experiencing some growth over the past couple of years the Speaker Cables/Interconnects category is just about status quo this year. Four of the top five companies return from past years with the exception being Honeywell, while 37 brands received mention overall.

Multiroom A/V Distribution Systems



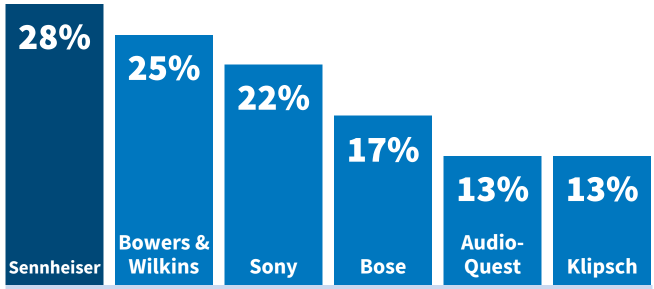
The category is a reflection of some of the industry's top go-to bands in Control4, Crestron, Savant, SnapAV and Sonos. This is one of the larger categories in terms of the overall companies represented, and it includes a nice mix of wireless with Bluesound and HEOS, with traditional products from ADA, Extron, Niles and SpeakerCraft.

Projection Screens



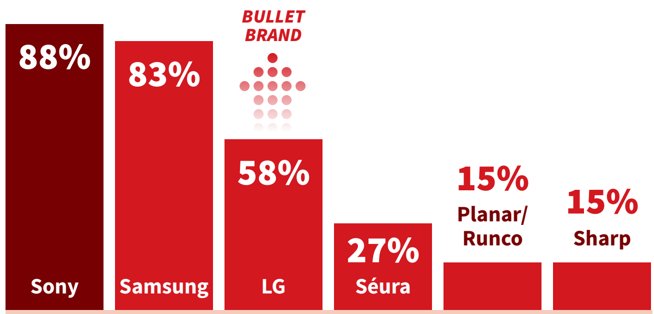
Drawing into a near tie with Stewart Filmscreen, SI added 15 dealer mentions. Dragonfly (SnapAV) and Da-Lite swap positions, while Vutec remains a consistent top-five brand. One interesting development will be the launch of Stewart's Phantom HALR ambient light rejecting screen material and its impact on SI's stranglehold on that market.

Headphones



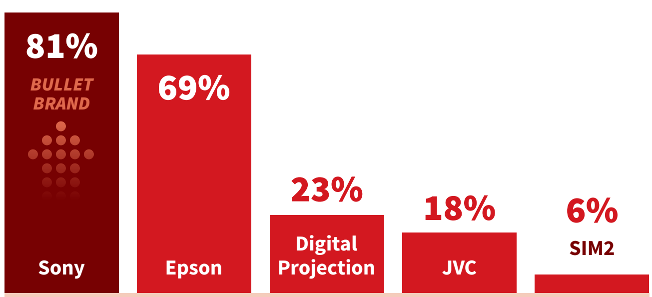
Perhaps to the surprise of some, Headphones is a relevant category for professional installers as consumers embrace quality listening for more than simply mobile devices. For the second year in a row the top five remains unchanged. Each company added to its 2016 dealer share, and Klipsch joins the leaders in a tie for fifth.

TV Displays



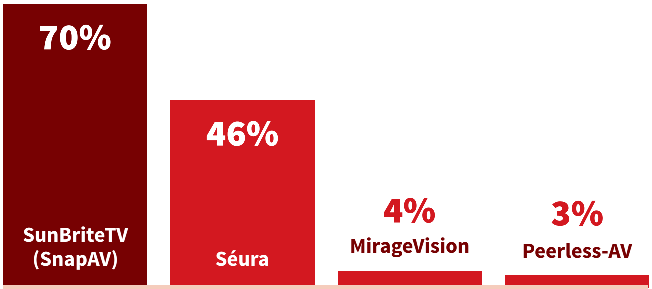
The TV category continues to consolidate. Sony and Samsung continue to be the major flat-panel manufacturers with more than eight in 10 CE Pro 100 dealers using their products. LG claims the number three position with a jump that may be the result of its OLED displays, which are hailed as some of the best performing products in the video industry.

Projectors



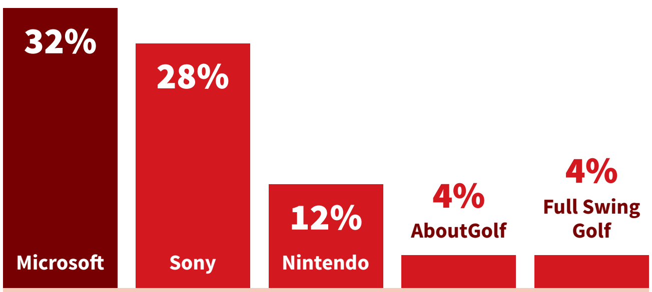
Sony has increased its leadership position in the category, and Sony, Epson and Digital Projection each added to its numbers. The gain for DPI represents a nice rebound for the Atlanta-based company after experiencing a dip in its CE Pro 100 share going from 2015 to 2016. JVC and SIM2 numbers remain stable.

Outdoor Video



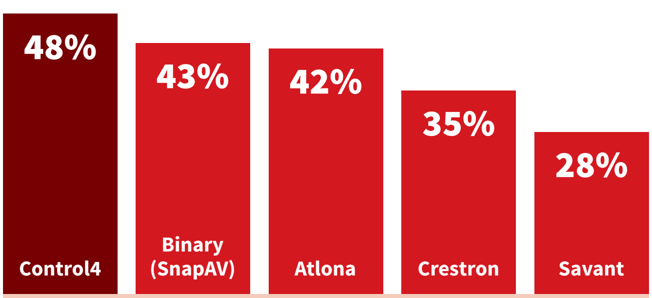
After a couple of years of flat numbers the Outdoor Video category boasted growth. SunBriteTV expanded its lead over Séura. The latter company, however, places in the TV Displays category as well, which may reflect its product diversity that includes mirror TVs along with commercial and residential outdoor solutions. Meanwhile, integrators also report installing indoor TVs outside at the insistence of some clients.

Gaming Systems



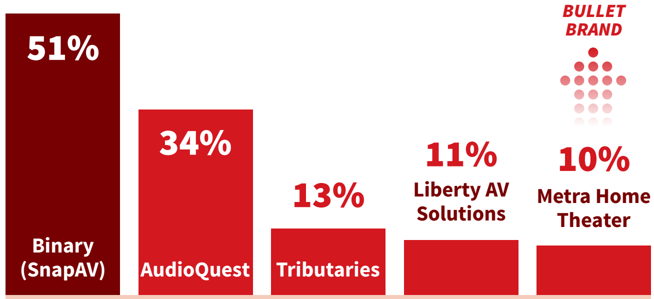
Overtaking longtime category leader Sony, Microsoft garners the top spot. The Xbox maker rolled out aggressive pricing during the 2016 holiday season, perhaps aiding its push. Looking ahead to next year it will be interesting to see if Nintendo's hot new Switch system bolsters its standing.

Video Distribution Switchers/Extenders



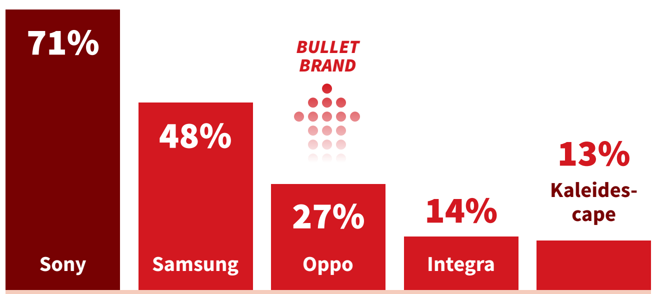
Updating the Video Distribution category, 2017 marks the first year for Video Distribution Switchers/Extenders. Control companies dominate the top of the list. Because of the evolution of this category and new technologies from HDBaseT and the explosion of A/V over IP, it could be the beginning of several years of growth for switchers/extenders providers.

HDMI Cables



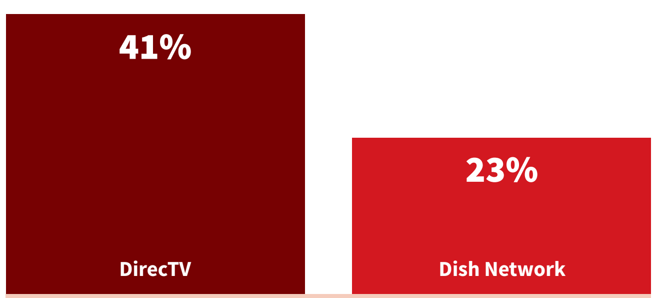
Each company in the top five increased its numbers from the previous year. The biggest winner is Metra, which doubled its figures, followed by Tributaries, Liberty, Binary and AudioQuest. The result of all this growth from an overall perspective is that Binary and AudioQuest have really emerged from a crowded field.

Blu-ray Disc Players



Sony opens up a commanding advantage in the category, which now features a maturing Ultra HD product market. After missing out in 2016, Oppo Digital, for instance, lands back into the top five with offerings like its UDP-203 Ultra HD disc player and new audiophile UDP-205 Ultra HD disc player.

Satellite TV



Satellite TV installations seem to be steady business for a chunk of the CE Pro 100. DirecTV leads the way with Dish Network second. There was not much movement in this category in 2016.

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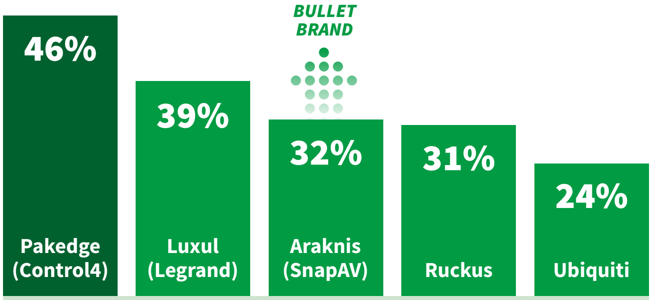
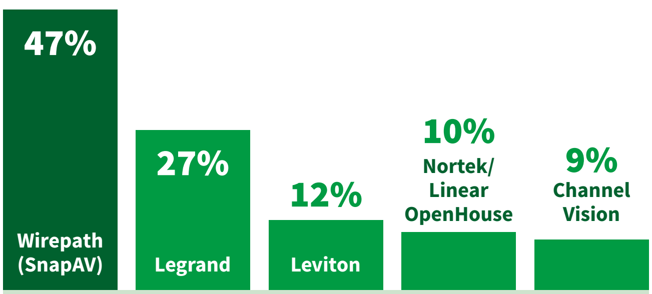
Home Networks



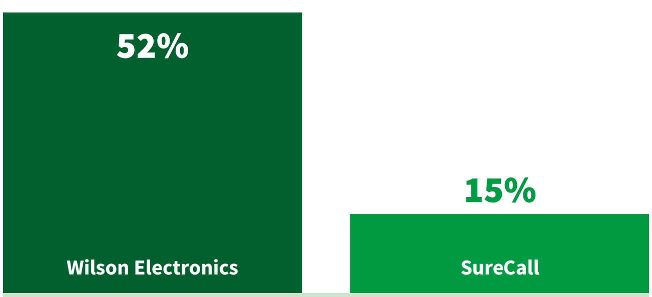
Arguably the most important category in home electronics these days, Home Networks is also one of the most competitive. The Pakedge brand continues to lead the category, but Luxul keeps pace. Araknis leapfrogs Ruckus to slide into third. Just missing the top five is custom system service provider Access Networks with 21 dealers.

Structured Wiring



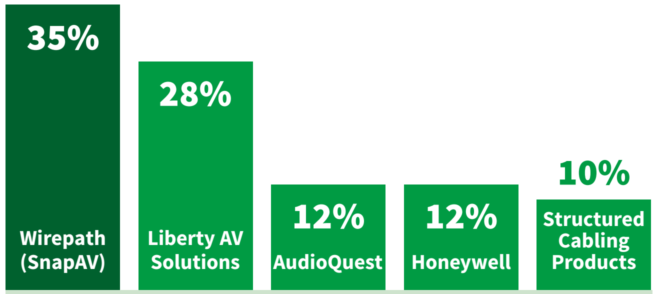
For the most part the Structured Wiring category remains unchanged from past years, showing much slower growth than other categories. Leviton picks up some dealer share to close the gap between the number two- and number three-ranked brands.

Cell Phone Boosters



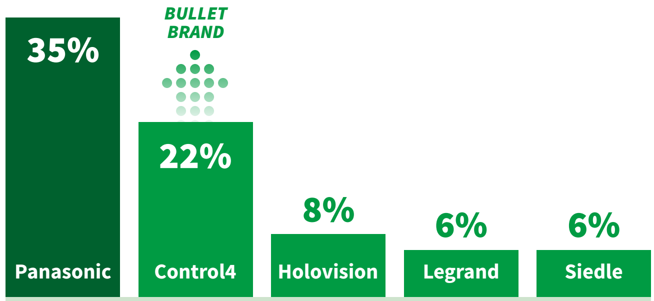
Since *CE Pro* started tracking the Cell Phone Booster category Wilson has led the market by a wide margin. This year's numbers for the company look similar to past years, but SureCall has continued to make strides to narrow the gap to 37 dealers.

Networking Cable



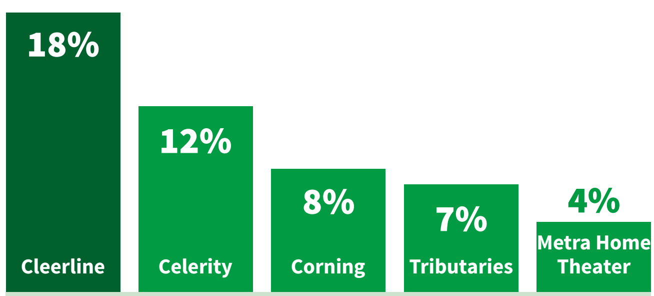
SnapAV's Wirepath brand surges past Liberty AV to claim the top spot. The remaining top four companies made modest gains, but not quite like those made in the Home Networks. It's worth noting that leading networking companies' dominance in that category doesn't extend to the use of Ethernet cable/category cables.

Phone Systems/Intercoms



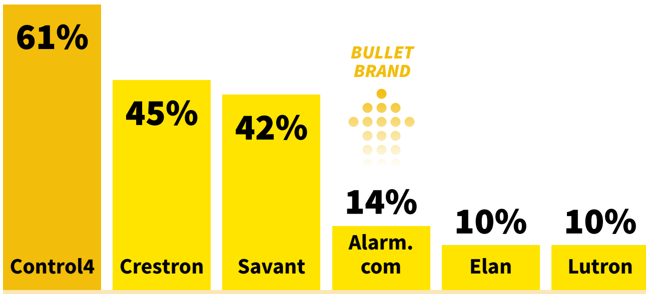
For years Panasonic has dominated the Phone Systems/ Intercom category, but its dominance is now being challenged. Panasonic still paces the category, but its margin is shrinking through Control4's addition of 14 dealers from its 2016 figures and Panasonic's drop of 17.

Fiber Optic Cable



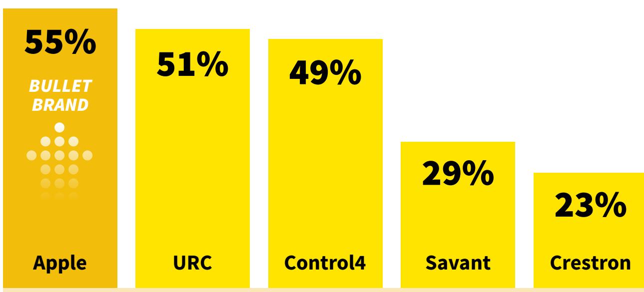
Fiber optic cable is a new category for the Brand Analysis. Over the next few years with the increasing bandwidth requirements needed to transmit 4K signals with HDR, and looming next-generation technologies such as 120Hz refresh rates and 8K, this category could experience a lot of growth particularly as dealers utilize solutions from the commercial market.

Whole-House Automation



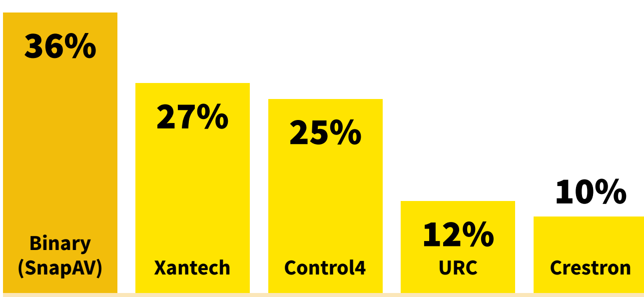
The top two companies' numbers are similar to 2016's with just a slight gain for both Control4 and Crestron. Savant improved by approximately 15 percent to cement its position as the third-most-used brand. The real news is the emergence of Alarm.com and Lutron beyond their respective security and lighting/shading specialties.

Remotes/Interfaces/Smart Devices



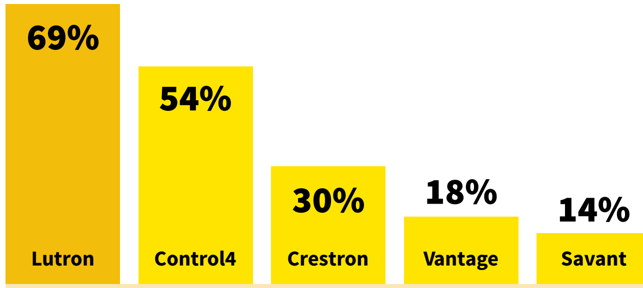
Through the popularity of its iOS platform and products like the iPad and iPhone, Apple now paces Remotes/Interfaces/Smart Devices. Control4 has pulled into a near dead heat with longtime commanding category leader URC for second place. Jumping ahead of RTI (No. 6, 16 dealers), Crestron ranks as the number five brand. Three dealers note using commercial solution Microsoft Surface.

IR Distribution Systems



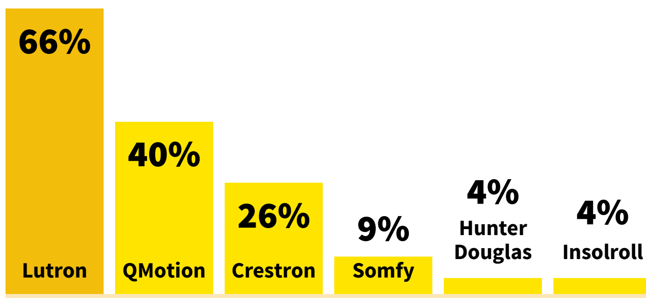
Following up on its takeover of the IR Distribution category in 2016, Binary, SnapAV's brand, maintains its position. Making a big leap upward, Control4 triples the amount of CE Pro 100 dealers using its products from the prior year. Crestron also jumps into the top five.

Lighting Control



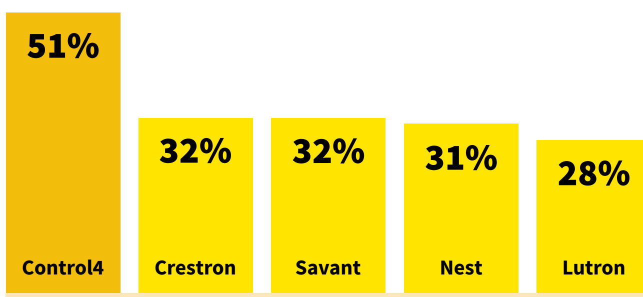
Lutron and Control4 remain the top brands, with the former adding to its advantage over the second and third spots. Vantage and Savant made slight gains. Looking at the numbers for the control and automation categories it appears the explosive growth the market has slowed a little. This could be a lull before the storm as voice control gains momentum to fuel more automation solutions, including lighting control.

Motorized Window Treatments



Adding approximately 10 percent to its previous year totals, Lutron affirms its position as the go-to automated window solution provider. QMotion continues its ascent in recent years as the second-most-used manufacturer in the category, while Crestron enjoys representation from more than a quarter of the CE Pro 100.

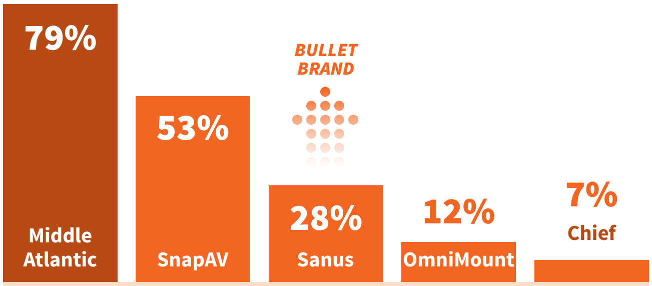
HVAC Control



After gaining significant momentum the past couple of years, Nest's climb to the top of the HVAC Control category has slowed. Leading the category is Control4, closely followed by Crestron, Savant, Nest and Lutron. HVAC Control may be the most competitive category in the industry at the moment.

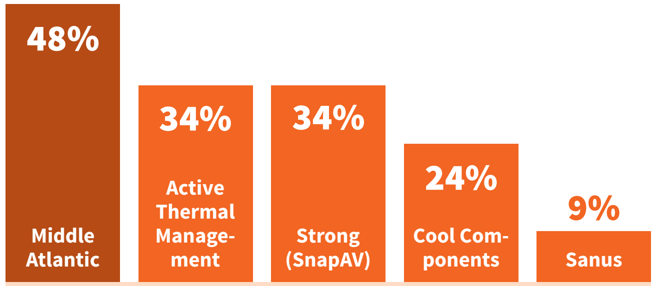
HOME ENHANCEMENTS

Racks



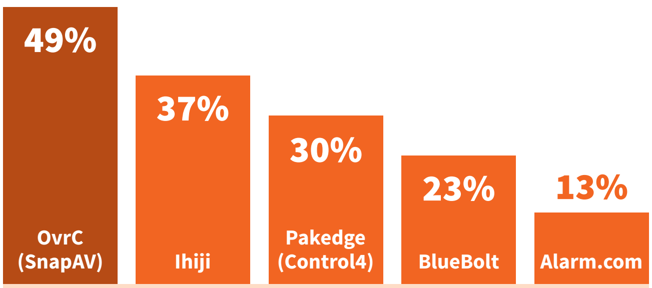
For the most part the rack category remains unchanged, led by market stalwart Middle Atlantic. The one brand that made noise within the category is Sanus. Adding 11 dealers from its 2016 totals, Sanus is now solidly the third-most-used brand in the rack category.

Rack Cooling Systems



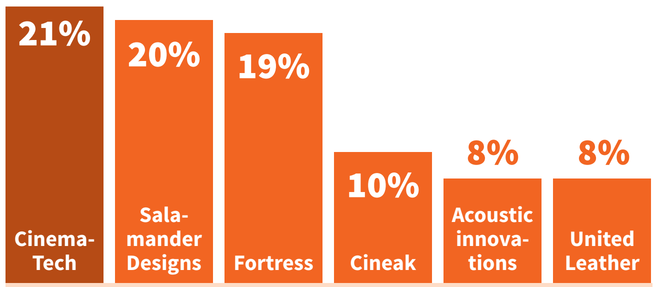
After pulling into a near tie with Active Thermal Management in 2016, SnapAV's Strong brand closed the gap to share second with ATM behind Middle Atlantic. Popping into the top five Cool Components has nearly a quarter of CE Pro 100 backing. Sanus adds five dealers from last year's tally.

Remote Managed Services



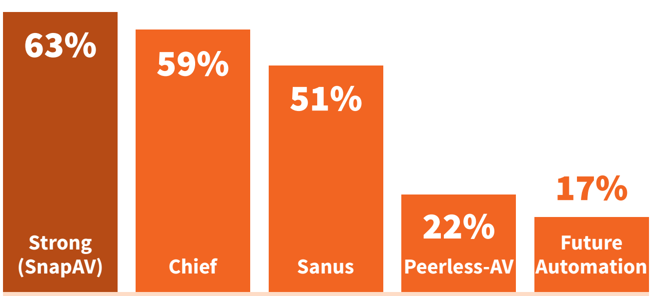
Fueled by the continual refinement of its OvrC platform, SnapAV is the new Remote Managed Services category leader. Making up the rest of the top five brands, Pakedge, BlueBolt and Alarm.com each respectively saw significant additions. Dealers notably consider power management as a part of this category mix.

Seating



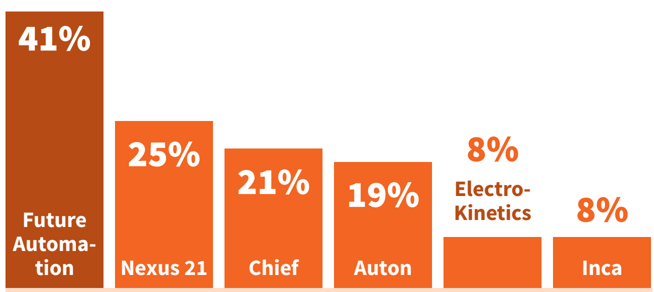
As competitive as the Seating category has been over the years, it is even more so in 2017. Ahead in the category with the slimmest of leads, CinemaTech edges Salamander Designs and Fortress. Like many categories, this one is growing as more than two dozen companies received mention.

Mounts



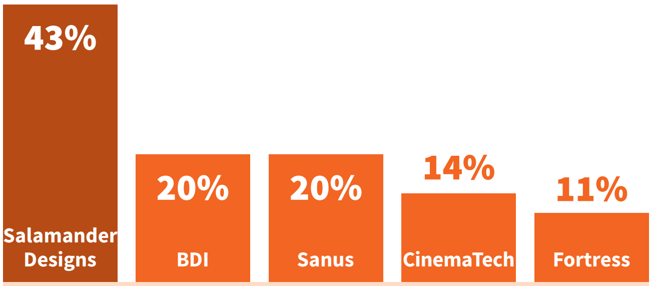
One of the largest, most universally used categories in the industry, Mounts shows about a 15 percent increase in usage over the previous year. The top four companies in order from 2016 are unchanged. Future Automation cracks the top five for the first time.

Lifts



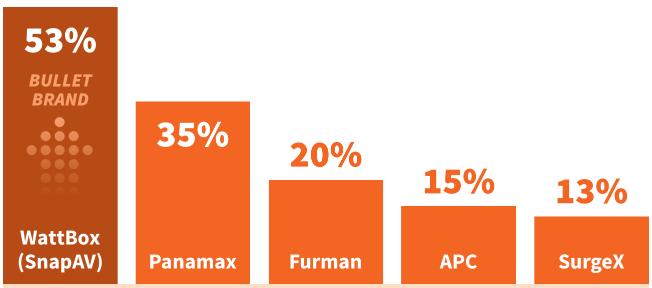
Surging past Auton, Future Automation lands in the top spot by adding 24 dealers. For the most part, the rest of the Lifts category looks similar to previous years with Nexus 21, Chief and Auton holding strong market presence.

Furniture



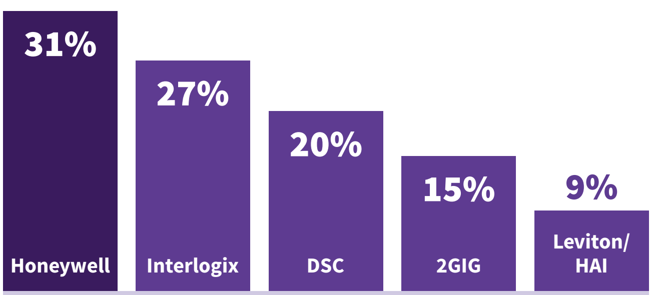
Salamander comfortably leads a category featuring 23 manufacturers mentioned by CE Pro 100 dealers. Salamander, along with CinemaTech and Fortress increased their respective dealer totals from the previous year, while BDI and Sanus held serve. No other brands had double-digit dealer counts.

Power Conditioners



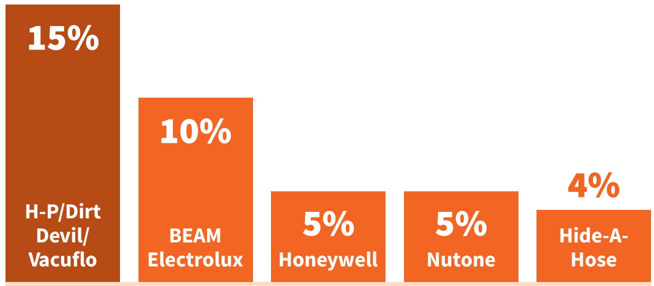
Remote management drives the use of products in the Power Conditioning/Surge Protection category. Backed by SnapAV's OvrC platform, WattBox comes in as top brand, followed by the BlueBolt-enabled product lines from Panamax and Furman. APC and SurgeX also offer remote management options.

Intrusion/Fire Control Panel



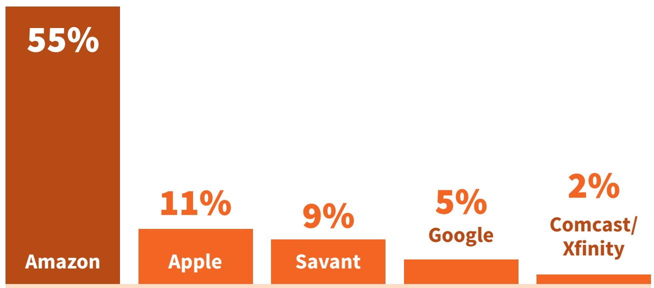
Picking up nearly 50 percent more dealers from its 2016 totals, Honeywell leads the category followed by Interlogix, which is the old brand name that UTC resurrected. Tyco brands DSC (third) and Qolsys, just outside the top five, showed solid support.

Central Vacuum



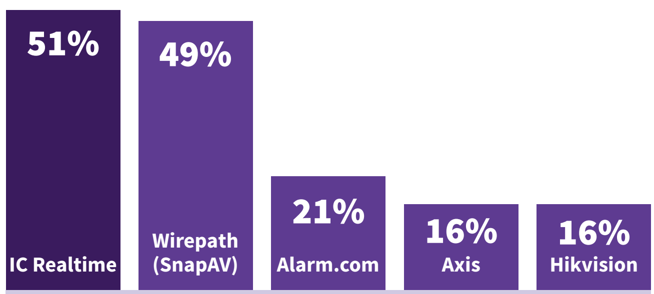
After years of stagnation, the highly profitable but underutilized Central Vacuum category experienced some growth in the percentage of CE Pro 100 dealers installing these systems. Leading the category for the second year in a row is H-P and its brands. BEAM Electrolux, Honeywell, Nutone and Hide-A-Hose follow.

Voice Control



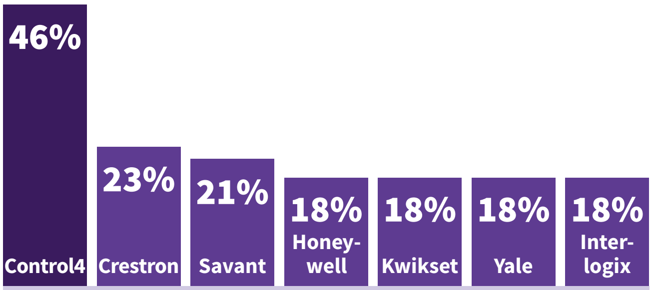
Voice Control is a new Brand Analysis category for 2017. Not surprisingly, Amazon's Alexa dominates the market. Apple with its Siri platform is a distant second. Perhaps most surprising is the showing of Google. Given the advertising and marketing push that Google is giving its Assistant platform and Home speaker, it will likely fare much better in the years to come.

Cameras



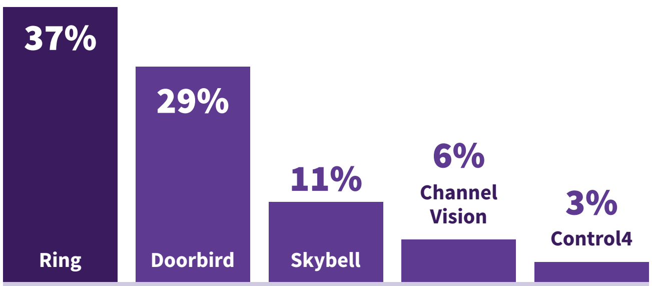
For the past couple of years the category has remained stable, but this year beyond perennial leader IC Realtime and Wirepath's familiar positioning, there has been change. Lilin and Vivotek fall out of the top five, with Alarm.com and Hikvision taking their places. The Cameras category saw 35 manufacturers mentioned, and for the sixth straight year IC Realtime leads the way.

Access Control



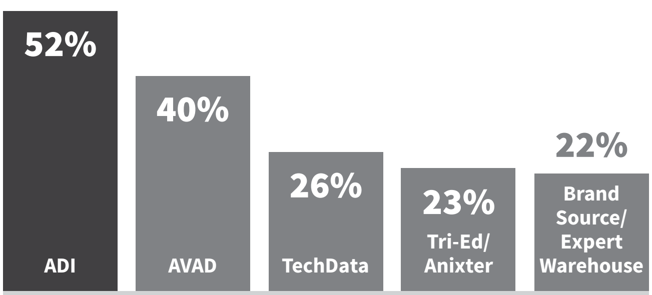
To say the Access Control category has exploded could be an understatement. In 2016 Control4 led with 17 dealers and fifth-place Savant had seven. Control4 nearly triples its total, while Savant does triple its tally. For perspective, Holovision doubled its 2016 numbers and that wasn't good enough to maintain its top-five status. There's a four-way tie for fourth place.

Video Doorbells



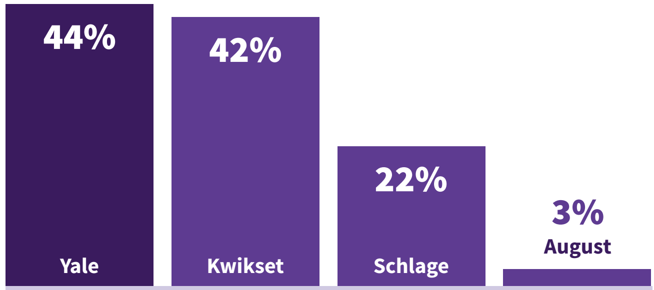
Video Doorbells is also new for 2017, and arguably the most recognizable name in the category — Ring — leads the way with 37 dealers. Following close behind is DoorBird before a steep dropoff to Skybell, Channel Vision and Control4. Dealers used a total of 11 manufacturers in the Video Doorbell category.

General Distribution



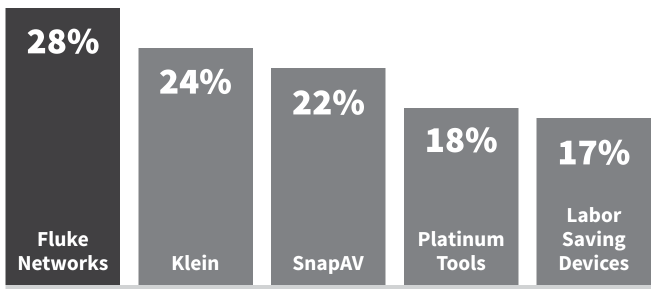
General Distribution is clearly regional in nature, but ADI and AVAD lead in the Brand Analysis. What's interesting about the General Distribution category is that it's plain to see the influence of IT and security sectors in residential systems, with the strong showing of Tech Data and Tri-Ed/Anixter, respectively.

Smart Door Locks/Dead Bolts



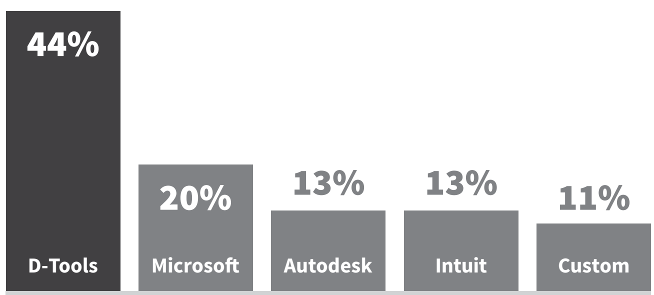
A new category for 2017, Yale leads the Smart Door Locks/Dead Bolt category in a tight race with Kwikset. The dropoff from the number two to number three positions is noticeable with Schlage 20 dealers behind Kwikset.

Tools & Testers



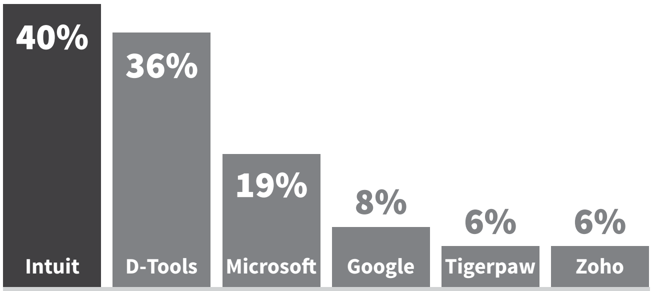
The second-year Tools & Testers category has undergone quite a bit of upheaval from its debut in 2016. Fluke Networks jumped to the top after much less representation last year. The co-leaders from 2016 are well represented with 24 dealers using Klein products and 18 enlisting Platinum Tools' products. Labor Saving Devices surged into the top five.

Design Proposal Software



D-Tools maintains its hefty CE Pro 100 dealer support. Unlike past years in which industry-specific programs experienced a growth in usage, this year mainstream solutions like MS' Visio, Autodesk's AutoCAD and Intuit's QuickBooks were called out as popular choices. It's also noteworthy that a rising amount of dealers are using custom software solutions.

Business Management Software



Business Management Software is a new category for 2017, with Intuit driven by its ubiquitous QuickBooks leading the way. CE Pro 100 dealers used Microsoft predominantly for Excel, though a couple mentioned its SharePoint program. A handful rely on Google's cloud-based Drive. The only custom industry market-specific solution among the top five is D-Tools.

CE Pro 100 companies, recognized in May's issue of *CE Pro*, are eligible to attend this year's CE Pro Summit being held Nov. 1-3 in Orlando, Fla.

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