



**Business Intelligence for the Custom Electronics Market**

*Custom Home Electronics –*

# BRAND AWARENESS, USE and PREFERENCE Study



*Focus on Home Systems Dealers, Installers and Integrators*

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# Introduction

Prompted by recognition of the near total absence of objective market information regarding the frequency with which various brands are specified and installed by custom electronics professionals, EH Research undertook the first-ever survey of this topic during the spring of 2005. That information was updated with survey results released during March of 2006, in May of 2007, in June of 2008 and in March of 2009. This report further updates and extends that information, based on brand use and preferences data collected from installing dealers and integrators during February of 2010. For the second straight year it also presents information regarding the most important distribution firms that are used and preferred by the custom electronics installer/integrator community.

## Research Study Objectives

- To develop an understanding of custom electronics professionals' familiarity with a pre-selected list of brand names within 25 separate product categories;
- To determine which of these pre-selected brands have been specified/used/installed by custom electronics professionals at any time during the past two years;
- To develop estimates of which of these pre-specified brands have been used most frequently by custom electronics professionals over the course of the past two years;
- To solicit information from survey respondents regarding what other brands – not pre-listed on the survey questionnaire – they have used during the past two years;
- To collect information regarding the use and preference of distributors involved in providing products to custom electronics dealers, installers and integrators;
- To compare information collected this year with comparable information collected over time for the products and brands that have been pre-listed in previous year's brand awareness/use/preference surveys.

## Procedures and Methodologies

The *Brand Awareness, Use and Preference* survey was conducted over a three-week period during February of 2009. EH Research developed an online survey questionnaire and solicited responses from the universe of custom electronics installing companies captured in the subscriber files of *CE Pro* magazine for which email addresses were available.

The survey was approximately 30 questions in length (varying slightly because of the variable number of product categories included on three separate survey questionnaires). For the 25 individual product categories which were the focus of this survey – as well as for the distributors used by custom electronics professionals to source at least some of the products that they sell and install – the following three identical questions were asked of all survey respondents:

- ⇒ Which of the following brands (or – for one question – distributors) are you FAMILIAR WITH?
- ⇒ Which of the following brands (distributors) have you PURCHASED/USED within the past 2 years?
- ⇒ Which one of the following brands (distributors) have you purchased/used MOST FREQUENTLY within the past 2 years?

Since many of the brand names associated with the custom electronics market cross multiple product categories, it was critically important that survey recipients think clearly about the brand within the context of the specific product for which they were asked to report. Consequently, respondents were asked to strictly limit their answers to familiarity and usage of individual brands *within the specific product category* for which they were reporting. To the extent that these explicit instructions were followed consistently by respondents, we are confident that we have been able to successfully minimize or eliminate any non-sampling error in the survey results that could be attributed to respondent confusion.

The study commenced on February 2<sup>nd</sup>, 2010 when an invitation to participate in the survey was e-mailed to three separate panels of home systems' installer/integrator firms that were qualified to receive *CE Pro* magazine. The 14,459 qualified firms in the universe were randomly selected and equally divided among the three groups. The e-mail invitation was successfully delivered to 14,333 of these firms, or 99.1% of all companies previously identified as being within the scope of the survey.

One survey panel received a questionnaire that focused on the following 7 product categories, as well as the related distributor category. A total of 220 usable responses were received from this group:

- In-Wall/Ceiling Speakers
- Floor/Shelf (Freestanding) Speakers
- AV Receivers
- Amplifiers and Pre-Amps
- Multi-Room Audio Distribution
- Media Servers
- Audio/Video Wire & Cables

A second survey panel received a questionnaire that focused on the following 10 product categories, as well as the related distributor category. A total of 201 usable responses were received from this group:

- Plasma Flat-Panel TVs
- LCD Flat-Panel TVs
- Front Projectors
- Video Film Screens
- Racks
- Mounts and Lifts
- Power Conditioning/Power Quality/Surge Suppression
- A/V Cabinetry and Stands
- Seating – Home Theater/Media Room
- Acoustical Treatments – Home Theater/Media Room

A third survey panel received a questionnaire that focused on the following 8 product categories, as well as the related distributor category. A total of 216 usable responses were received from this group:

- Whole-House Automation/Integration
- Security Systems
- Lighting Controls
- HVAC Controls -- Standalone
- Window Covering/Shade Controls
- Universal Wireless Remote Controls -- Standalone
- Central Vacuum Systems
- Structured Wiring Systems

The e-mail invitation included notice that – as incentive for participation – survey respondents would have the opportunity at the conclusion of the survey to provide their e-mail address in order to be entered into a random drawing to win one of three American Express Gift Cards valued at \$500 each. Follow-up e-mail invitations were sent to all non-respondents on February 11<sup>th</sup>, 2010 and on February 16<sup>th</sup>, 2010. Responses to the survey were officially closed out on February 19<sup>th</sup>, 2010.

A total of 637 usable reports were recorded, a response rate of approximately 4.4% of the universe of the 14,333 installer/integrator/retailer firms that were successfully contacted via e-mail. The margin of error for percentages based on the total answering for each product category asked about in this study is estimated at +/- 10%. While the margin of error for the various smaller sample sizes (e.g., for regions and company-size cohorts) cannot be calculated with any degree of precision, they would be of a magnitude significantly larger than for the aggregate product groups.