

## IDC: Google Leads Q1 European Smart Home Market

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The European smart home market sees shipments reach 21.3 million units in Q1 2019, IDC reports-- a 23.9% Y-o-Y increase, with W. Europe responsible for 88.3% of the region share, even as CEE sees the biggest increase (32.2% Y-o-Y).

The market is forecast to reach 107.8m in 2019, growing 21% from 2018. It is set to reach 183.9m in 2023, with video entertainment and smart speakers as the 2 main categories.

### Europe Top 5 Smart Home Vendor Shipments, Market Share and YoY Growth, 1Q19

(Shipments in Thousands)

| Vendor            | 1Q19 Shipment Volume | 1Q19 Market Share | 1Q18 Shipment Volume | 1Q18 Market Share | Year-Over-Year Change |
|-------------------|----------------------|-------------------|----------------------|-------------------|-----------------------|
| 1. Google         | 3,575                | 16.8%             | 2,612                | 15.2%             | 36.9%                 |
| 2. Samsung        | 2,853                | 13.4%             | 2,391                | 13.9%             | 19.3%                 |
| 3. Amazon.com     | 2,810                | 13.2%             | 2,357                | 13.7%             | 19.2%                 |
| 4. LG Electronics | 2,129                | 10.0%             | 2,030                | 11.8%             | 4.9%                  |
| 5. Sony           | 1,231                | 5.8%              | 1,250                | 7.3%              | -1.5%                 |
| Others            | 8,670                | 40.8%             | 6,530                | 38.1%             | 32.8%                 |
| <b>Total</b>      | <b>21,268</b>        | <b>100.0%</b>     | <b>17,170</b>        | <b>100.0%</b>     | <b>23.9%</b>          |

Source: IDC Worldwide Quarterly Smart Home Device Tracker, June 2019

Smart speakers are up by 58.1% Y-o-Y to 3.35m units shipped, making 15.8% of the market and the 2nd largest product category. It is also the best quarter yet for the category, according to IDC. Google Home devices are responsible for 45.1% of smart speakers shipped, beating the

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41.8% of Amazon Echo devices. However the analyst still expects Alexa to remain the top voice assistant in Europe in 2019, even if the Google AI Platform should beat it by 2022.

"Google had a stellar quarter and was the clear winner in Q1 2019, reaching an important milestone in Europe," the analyst says. "Google continues to expand to new countries and support new native languages at a faster pace than Amazon. This is also contributing to strengthening its position in voice assistant platforms. Google Assistant was present in 49.2% of all smart speakers sold in Europe in the first quarter of 2019. Meanwhile, Amazon faced supply issues, with the Amazon Echo Dot being out of stock in some countries for several weeks, leaving space for Google Home products to grow."

Video entertainment device-- including smart TVs and digital media adapters-- shipments total 12.7m in Q1 2019, an 11.2% Y-o-Y increase. Smart TVs are the biggest product in the category. Meanwhile lighting, home security/monitoring and thermostats account for 20.8% of the Q1 2019 European smart home market. IDC expects the combined categories to grow 9.5 p.p. in market share with a CAGR of 27.11% between 2019 and 2023, thanks the adoption of smart speakers bringing the desire to control more devices through voice.

Go [IDC WW Quarterly Smart Home Device Tracker June 2019](#)