

# The Future Home: The Incremental Value Gains Offered by .Robot Friendly Rooms.

July 2021

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## INTRODUCTION

Scope

Key findings in “Robot Friendly Rooms”

## FUTURE HOME

Overview of the Home and Technology strategic themes for 2021

An overview of the strategic theme: The Future Home

Aspects that give insight into how the future home will work

Companies are meeting consumer needs using various strategies

Robot Friendly Rooms a story of Future Home Automation

## AN INTRODUCTION TO ROBOT CLEANERS

Current technology is based on floor cleaning robots with brushes

The size and shape of the domestic robot vacuum cleaner market

The maturing appeal beyond early adopters towards family homes

A robot sales boom in 2020 was not just about lockdown hygiene

Leading companies in domestic vacuuming robots globally

Countries where robot cleaners are most popular

Two factors define cleaning performance - efficacy and efficiency

Robots compete with human results in terms of dedicated time on task

Robot performance is only part of this; home preparation matters

The robot journey has many gaps versus “Rosie” from the Jetsons

How robot cleaners fit into the Hygienic Home consumer system

There is a timely aspect to this topic implying “low hanging fruit”

What does robot cleaner growth imply for home and garden retail?

## BARRIERS TO 100% COVERAGE

An uncluttered room still poses barriers for robot cleaning coverage

We need to view rooms and furniture from the robot’s perspective

“Going under” is one of the key robot benefits; height really matters

Getting stuck 1: Height clearance issues in the “middle ground”

Getting stuck 2: The chair leg prison of doom

Getting stuck 3: Tangled up hard cords and cables

Getting stuck 4: Choking on soft fabrics and rug/carpet fibres

“Fails” can sometimes be quite artistic...but it is never a good thing

Getting stuck 5: Loose items (socks, screws, LEGO and jewelry)

Dust traps 1: Physical barriers that still let dust bunnies accumulate

Dust traps 2: Not all furniture leg shapes are easy to clean around

Dust traps 3: Stair steps and cliffs limit this as a “one floor” solution

Dust traps 4: Furniture legs need to be robot friendly from all sides

Dust traps 5: A rug’s height differential can make it a robot barrier

Contrast affects navigation technology for the majority of robots

The dirty little euphemism called “secondary contamination”

Some user stories fall inside the “marketing unspeakables ” bracket

## RELEVANCE IN HOME AND GARDEN

What furnishings and flooring products impact robot coverage?

Relative spend in-scope from home furnishings

Relative spend in-scope from home improvement

Around 25% of robot spend is premium spending over USD500

Room planning services using augmented reality and furniture tools

Accessory bundles that can come out of such a service relationship

Basket impacts when boosting a sofa sale into a “robot friendly room”

Big price decisions made in the kitchen will also clearly be impacted  
No one can demonstrate a robot at 100% peak performance better  
Biggest cross-over markets for spend on both furniture and robots

#### VETTING WHAT IS “ROBOT FRIENDLY”

The height clearance that needs to be avoided beneath furniture  
The widths between legs and obstacles that are best avoided  
Room transitions and cable protections impact robot climbing limits  
Only low pile rugs and carpets are friendly to best-seller robots  
Anything with tassels or loose fibres is decidedly robot “unfriendly”  
Checklist for furniture viable as part of “Robot Friendly Rooms”  
Value to be had from home accessories not usually linked to robots

#### CONCLUSION AND RECOMMENDATIONS

“Robot Friendly Rooms” takes existing behaviour and extrapolates  
The value placed in clean homes will be abnormally high for years  
Basket size and expected gains from selling “robot friendly” rooms  
Partnership and merchandising opportunities in furniture/robot retail  
Gains from co-development of future furniture and robot designs  
Incremental revenue opportunities in “robot friendly” room planning

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