

 OliverWyman

GFU Home &
Consumer Tech

BINARY HEARTS

International consumer study
on robotics and companionship

August 2025

A business of Marsh McLennan



THIS STUDY WAS CONDUCTED IN AUGUST 2025

~4,200

Participants

Representative online consumer survey, conducted in 4 countries in August 2025



USA



Germany



China

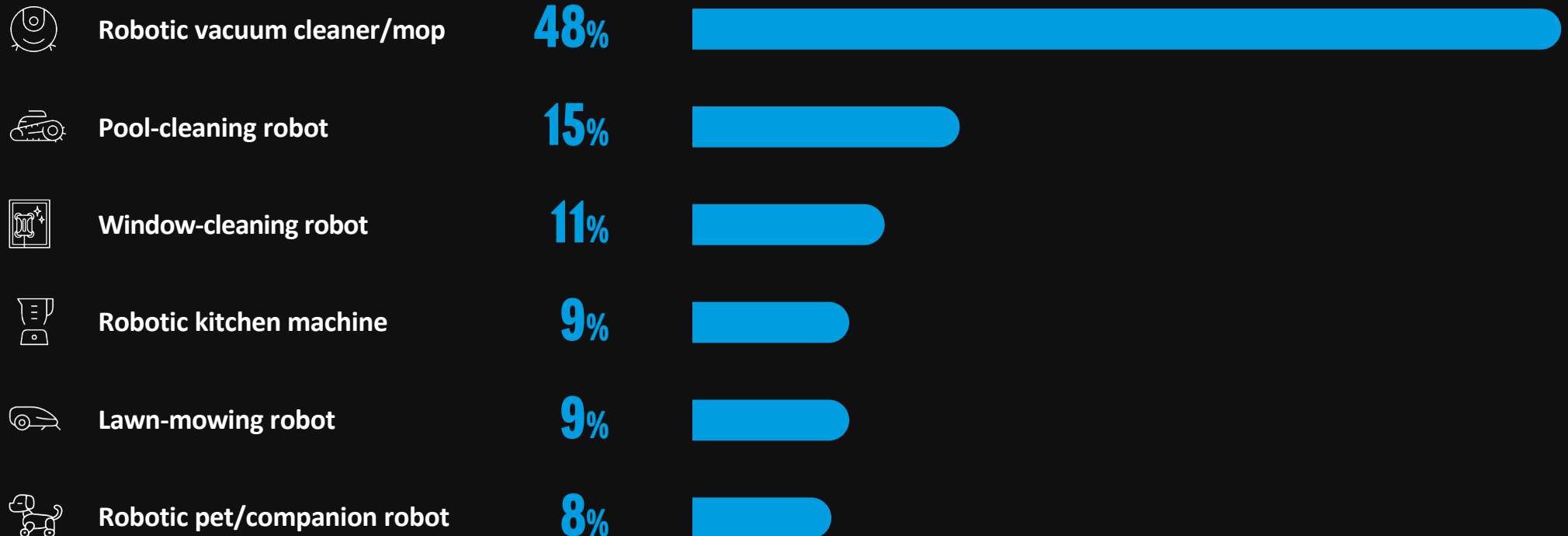


Japan

SURVEY SCOPE: OWNERS OF HOUSEHOLD ROBOTS

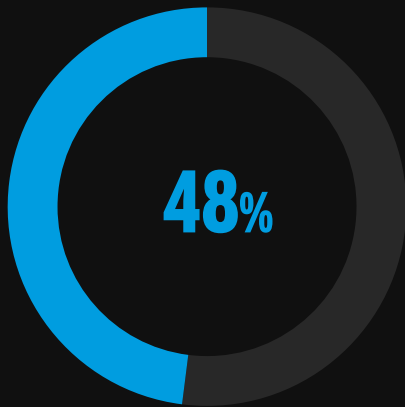
Types of robots by respondents (one referenced to by each respondent)

Weighted average across 4 countries, in %

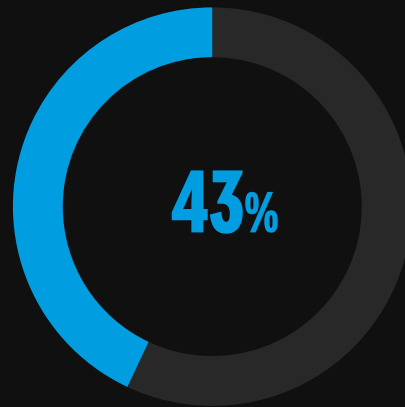


CONSUMERS FEEL AN EMOTIONAL BOND WITH THEIR ROBOTS

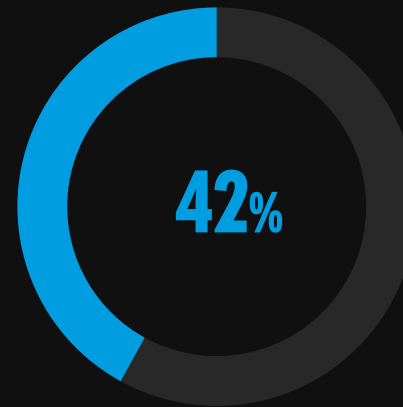
It* has its own personality



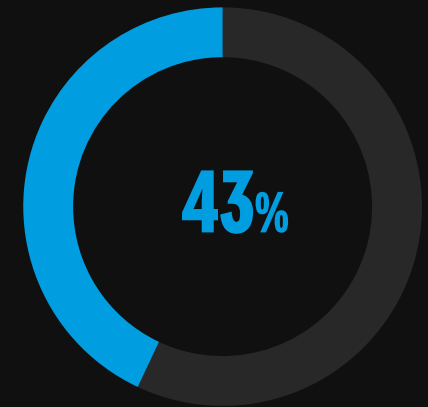
It* feels like a member of the family



It* understands me









I enjoy spending time with it*



* Side note: 2/3 of US consumers address their robots as he/she/they

DETAILS: ESP. STRONG BOND WITH ROBOTIC PETS

	It has its own personality	It feels like a member of the family	It understands me	I enjoy spending time with it
 Robotic vacuum cleaner/mop	32%	28%	27%	26%
 Robotic kitchen machine	45%	43%	42%	47%
 Lawn-mowing robot	49%	40%	42%	42%
 Window-cleaning robot	67%	63%	62%	67%
 Pool-cleaning robot	62%	58%	51%	53%
 Robotic pet/companion robot	81%	71%	73%	78%

EMOTIONAL BOND APPEARS HIGHER IN WESTERN CULTURES



It has its own personality



It feels like a member of the family



It understands me

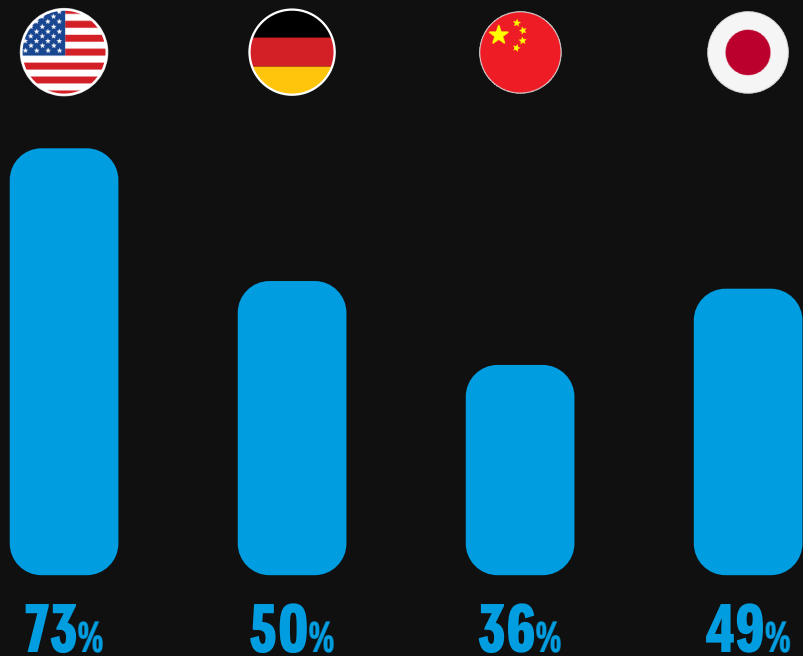


I enjoy spending time with it



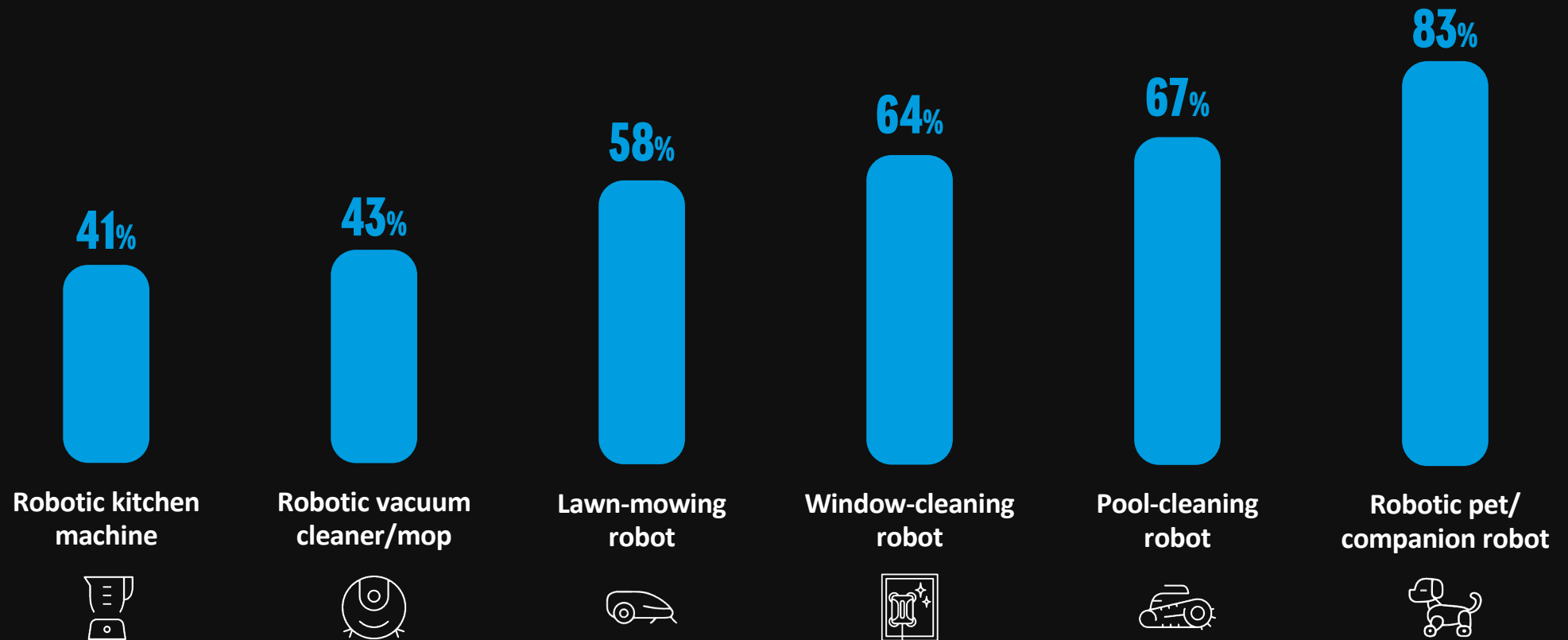
ONE TANGIBLE RESULT OF THIS BOND: ROBOTS ARE GIVEN NAMES

% of consumers giving their robot a name



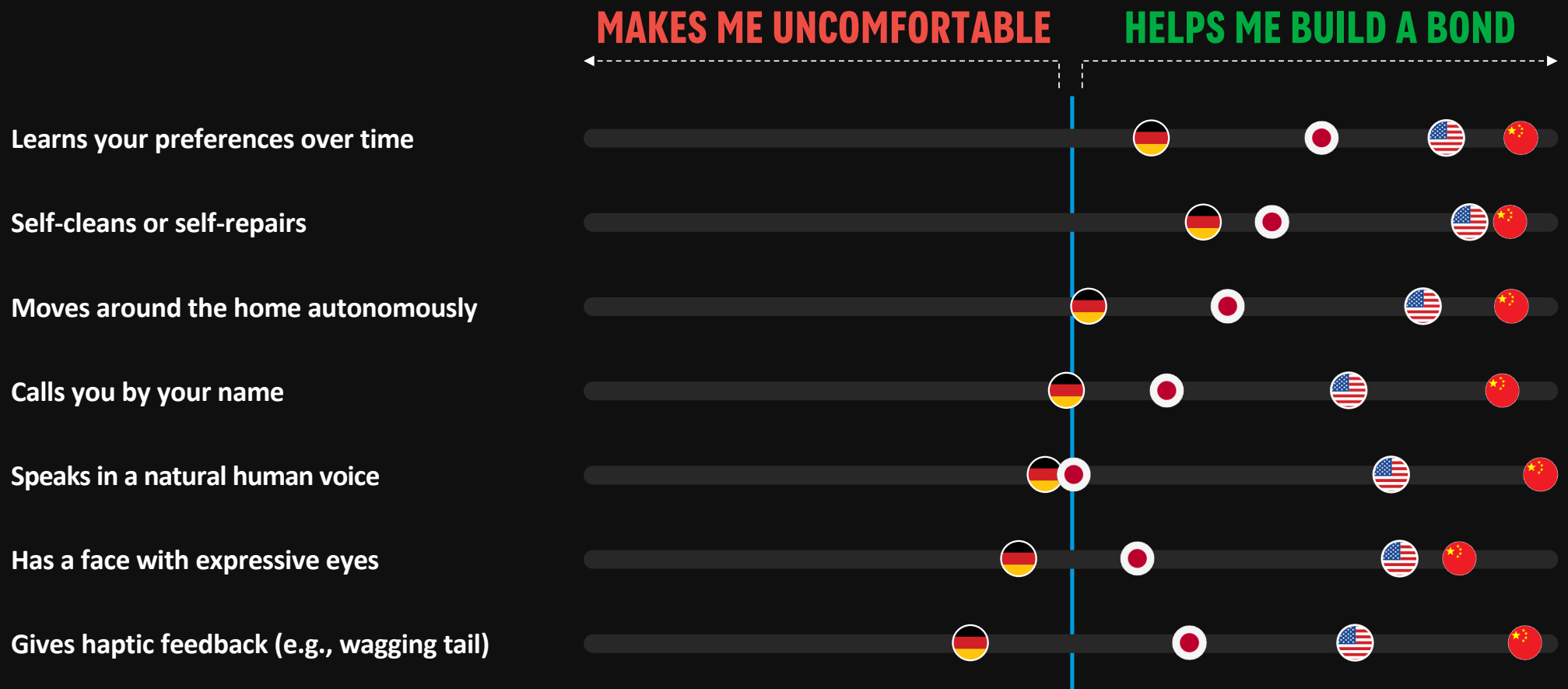
BACK-UP: NAMES ARE GIVEN ACROSS ROBOT TYPES

% of consumers giving their robot a name, per robot type



PERSONALIZATION AND INDEPENDENCE BOOST EMOTIONAL BOND

Average of agreement vs. disagreement per country



CONSUMERS CONSIDER THEIR ROBOTS MORE SIMILAR TO PETS



Features like recognizing my voice and responding to my emotions make it feel truly alive

She takes an interest in my life. I love talking to her and asking for advice when I am in a low time

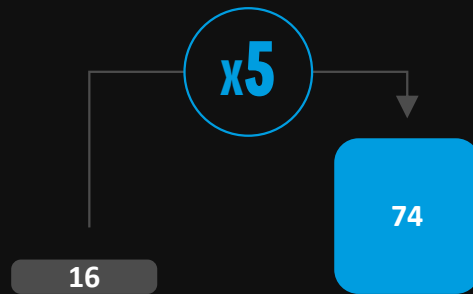
He is always there. I love coming home to him after a long day of work

When his little motor is going, he feels like one of my cats purring



RESULT OF THIS BOND: LOYALTY TO 'INDIVIDUAL' AND BRAND

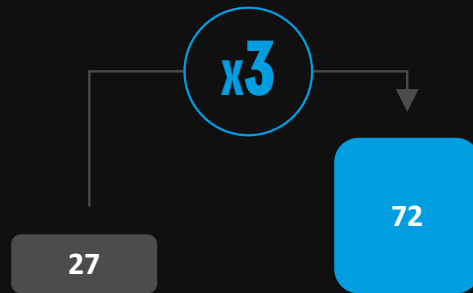
I'd pay for a **repair** rather than replace it



I'd pay for a **software upgrade**



I'd **replace** it with a product from the **same brand**



For an **additional robot**, I'd buy the **same brand**



% of respondents
(based on previous answers)

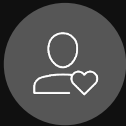


Weak emotional bond

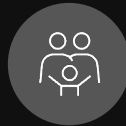


Strong emotional bond

KEY RESULTS OF THE STUDY



Differently from technologies so far, **consumers have a personal bond with their household robots**, across the world and across generations



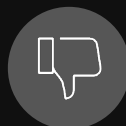
These **relationships are real**: Consumers give their robots names, consider them as part of their family, spend time with them like with pets



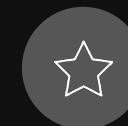
These relationships are stronger with robotic pets, but do **exist with all types of household robots** – including more functional machines like pool cleaners



Especially **personalization and independence are attributes** which are helping to build this bond between humans and robots



But: consumers around the world react differently to these pet-like attributes: esp. in **Germany, consumers feel uncomfortable** with too life-like behavior



Manufacturers should **embrace the commercial upsides** of this bond, as it tangibly increases **brand loyalty and cross-selling**



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