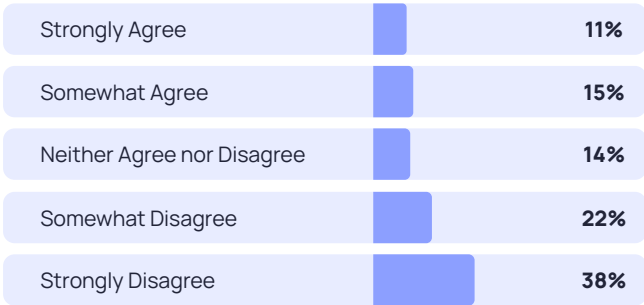# PAR®

# Consumer Preferences Snapshot: Restaurant Automation

In recent years, the food service industry has undergone a rapid transformation of automation and increased AI usage. To understand consumer sentiments and preferences regarding AI in restaurants, PAR Technology Corporation (NYSE:PAR) commissioned a survey of 1,000 U.S. consumers, conducted by Dynata.

## Do you believe AI should replace human restaurant workers if the technology provides more efficient service?

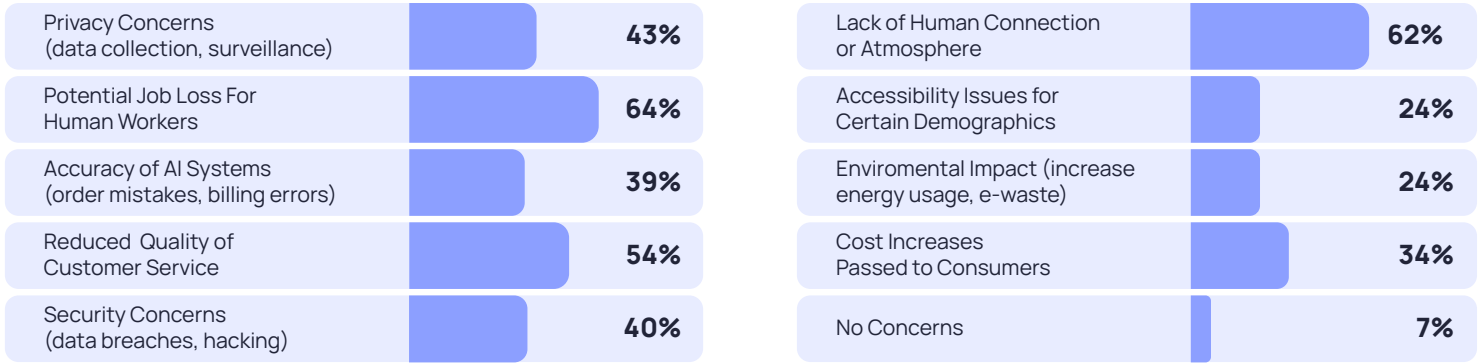| | |
|---|---|
| Strongly Agree | 11% |
| Somewhat Agree | 15% |
| Neither Agree nor Disagree | 14% |
| Somewhat Disagree | 22% |
| Strongly Disagree | 38% |

**Takeaway:**
60 percent of all survey respondents prefer human staff versus AI-managed customer support, despite the potential for increased service efficiency. Men (33%) are nearly twice as likely to support AI replacing human workers, compared to women (17%). Millennials (35%) and Gen Z (34%) are far more supportive of AI replacing human restaurant workers.

| | Total | Male | Female |
|---|---|---|---|
| Sample Size | 1000 | 506 | 494 |
| **Strongly Agree** | 11% | 15% | 6% |
| **Somewhat Agree** | 15% | 18% | 11% |
| **Neither Agree nor Disagree** | 14% | 16% | 13% |
| **Somewhat Disagree** | 22% | 21% | 23% |
| **Strongly Disagree** | 38% | 30% | 47% |

| | Total | Baby Boomers: | Generation X | Millenials: | Generation Z: | Other |
|---|---|---|---|---|---|---|
| Sample Size | 1000 | 218 | 287 | 322 | 139 | 34 |
| **Strongly Agree** | 11% | 3% | 9% | 16% | 17% | 0% |
| **Somewhat Agree** | 15% | 9% | 14% | 19% | 17% | 6% |
| **Neither Agree nor Disagree** | 14% | 16% | 15% | 13% | 17% | 6% |
| **Somewhat Disagree** | 22% | 25% | 22% | 17% | 25% | 24% |
| **Strongly Disagree** | 38% | 47% | 40% | 34% | 24% | 65% |

# Which of the following concerns, if any, do you have about AI in restaurants? (Select all that apply)

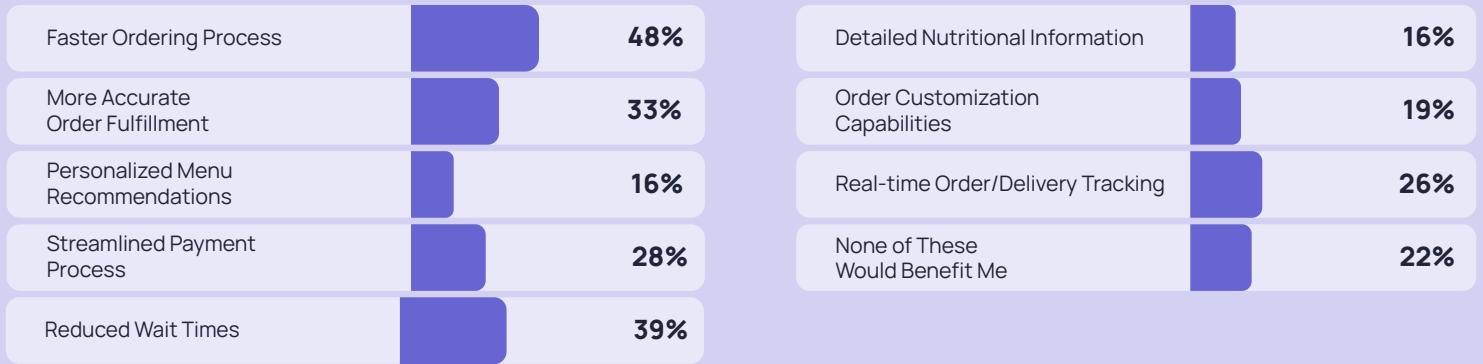| Concern | % |
|---|---|
| Privacy Concerns (data collection, surveillance) | 43% |
| Potential Job Loss For Human Workers | 64% |
| Accuracy of AI Systems (order mistakes, billing errors) | 39% |
| Reduced Quality of Customer Service | 54% |
| Security Concerns (data breaches, hacking) | 40% |
| Lack of Human Connection or Atmosphere | 62% |
| Accessibility Issues for Certain Demographics | 24% |
| Enviromental Impact (increase energy usage, e-waste) | 24% |
| Cost Increases Passed to Consumers | 34% |
| No Concerns | 7% |

Respondents also shared two main concerns about AI in restaurants, which are the potential job loss for human workers (64%) and the lack of human connection or atmosphere (62%).
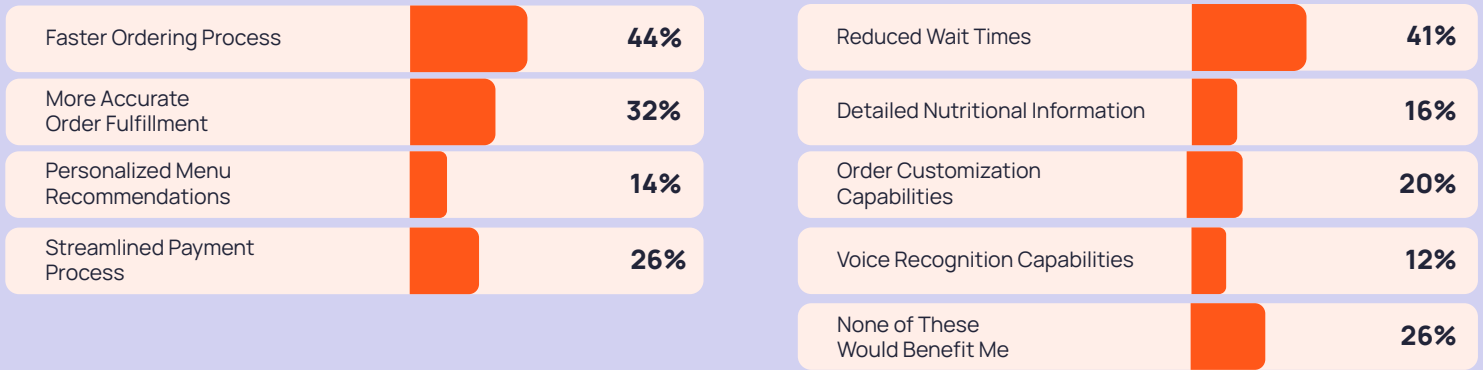
# When dining in at a restaurant, which aspects would benefit you the most when incorporating AI and technology? (Select all that apply)

| Aspect | % |
|---|---|
| Faster Ordering Process | 45 % |
| More Accurate Order Fulfillment | 28% |
| Personalized Menu Recommendations | 16% |
| Streamlined Payment Process | 31% |
| Reduced Wait Times | 40% |
| Detailed Nutritional Information | 20% |
| Order Customization Capabilities | 20% |
| Enhanced Entertainment While Dining | 9% |
| None of These Would Benefit Me | 25% |
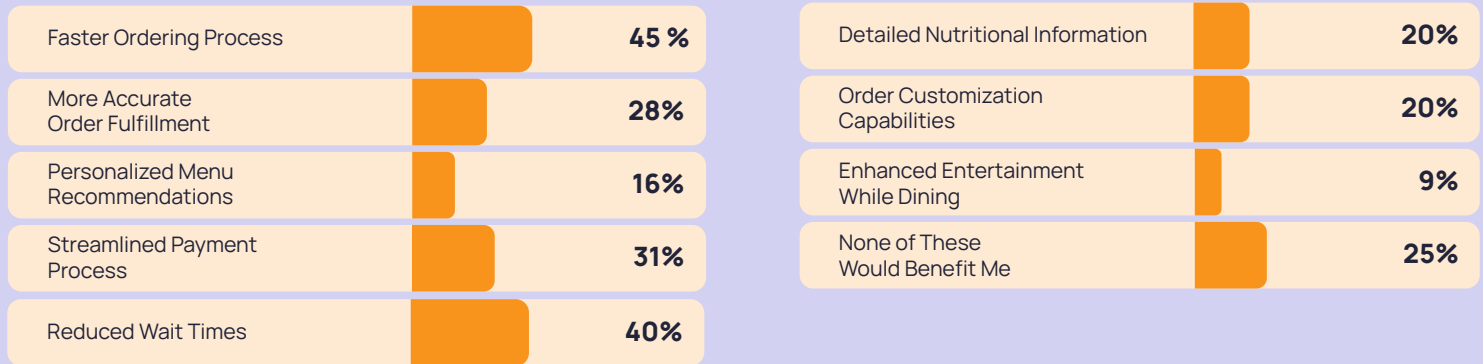
# When ordering takeout or delivery, which aspects would benefit you the most when incorporating AI and technology? (Select all that apply)

| Aspect | % |
|---|---|
| Faster Ordering Process | 48% |
| More Accurate Order Fulfillment | 33% |
| Personalized Menu Recommendations | 16% |
| Streamlined Payment Process | 28% |
| Reduced Wait Times | 39% |
| Detailed Nutritional Information | 16% |
| Order Customization Capabilities | 19% |
| Real-time Order/Delivery Tracking | 26% |
| None of These Would Benefit Me | 22% |

## When using a drive-thru, which aspects would benefit you the most when incorporating AI and technology? (Select all that apply)

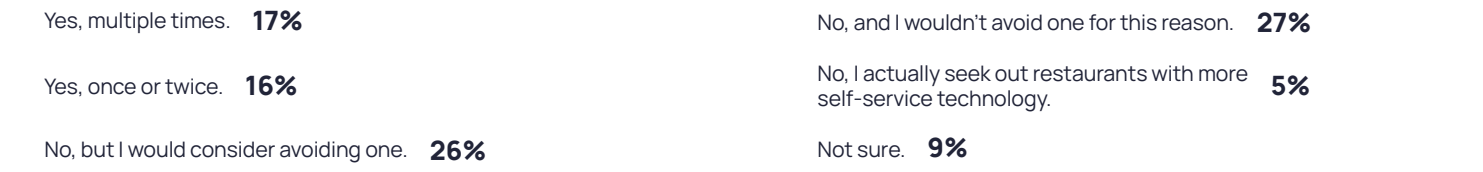| | |
|---|---|
| Faster Ordering Process | 44% |
| Reduced Wait Times | 41% |
| More Accurate Order Fulfillment | 32% |
| Detailed Nutritional Information | 16% |
| Personalized Menu Recommendations | 14% |
| Order Customization Capabilities | 20% |
| Streamlined Payment Process | 26% |
| Voice Recognition Capabilities | 12% |
| None of These Would Benefit Me | 26% |

Respondents indicated that AI and technology could significantly speed up the ordering process across various scenarios: **takeout or delivery** (48%), **dining in** (45%), and **drive-thru** (44%). Additionally, reduced wait times were highlighted as a key benefit: **drive-thru** (41%), **dining in** (40%), and **takeout or delivery** (39%).

## Which of the following restaurants would you be MOST likely to visit?

A restaurant that uses AI to speed up ordering and billing, but still has human staff for questions and serving. **44%**

A restaurant that does not use AI at all. **41%**

A restaurant that uses AI for the whole dining expirience (no human interaction). **8%**
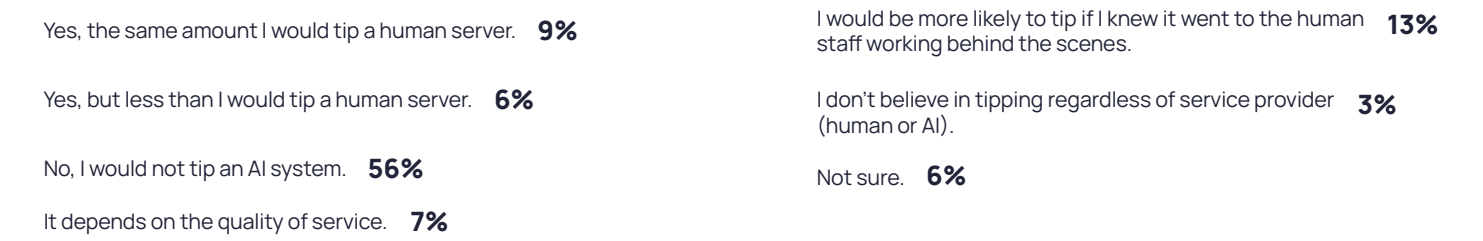
No preference. **8%**

44% favor a balance of human staff and some technology versus 41% who prefer no AI use at all in their dining experience.

## Have you ever avoided a restaurant due to excessive self-service technology?

Yes, multiple times. **17%**

No, and I wouldn't avoid one for this reason. **27%**

Yes, once or twice. **16%**

No, I actually seek out restaurants with more self-service technology. **5%**

No, but I would consider avoiding one. **26%**

Not sure. **9%**

33% of all respondents have avoided restaurants because of too much self-service technology.

## Would you tip an AI-powered system if it asked for one?

Yes, the same amount I would tip a human server. **9%**

I would be more likely to tip if I knew it went to the human staff working behind the scenes. **13%**

Yes, but less than I would tip a human server. **6%**

I don't believe in tipping regardless of service provider (human or AI). **3%**

No, I would not tip an AI system. **56%**

Not sure. **6%**

It depends on the quality of service. **7%**

56% of all respondents would reportedly not tip an AI system, while 22% would either tip or at least consider tipping, depending on the service.

## How would you feel about AI personalizing your dining experience based on your previous orders, preferences, or dietary information?

| | | | |
|---|---|---|---|
| Very comfortable - I'd appreciate the personalization. | **17%** | Somewhat uncomfortable - I'd prefer to make my own choices without AI suggestions. | **15%** |
| Somewhat comfortable - It would be convenient but I have some reservations. | **16%** | Very uncomfortable - I would not want AI to track or use my personal preferences. | **22%** |
| Neutral - I don't have strong feelings either way. | **19%** | Not sure - It depends on what information is collected and how it's used. | **11%** |

37% of all respondents feel uncomfortable with AI-driven personalization compared to 33% who do feel comfortable.

## Do you believe a restaurant that does not use AI is more ethical than one that does?

| | | | |
|---|---|---|---|
| Yes, significantly more ethical. | **20%** | No, significantly less ethical. | **5%** |
| Yes, somewhat more ethical. | **16%** | It depends on how the AI is implemented and what it replaces. | **14%** |
| No difference in ethics. | **30%** | Not sure. | **10%** |
| No, somewhat less ethical. | **5%** | | |

36% believe a restaurant is "more ethical" if it does not use AI, compared to those who see no ethical difference (30%).

## About the Consumer Preferences Snapshot

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