

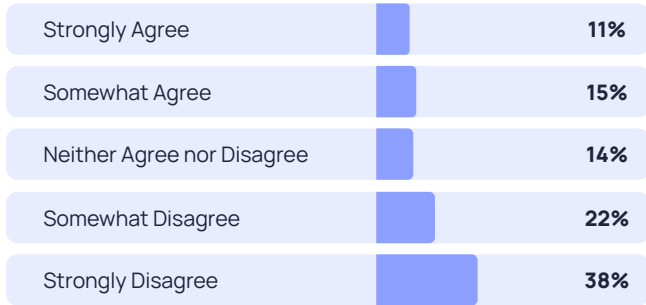


Consumer Preferences Snapshot: Restaurant Automation



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?



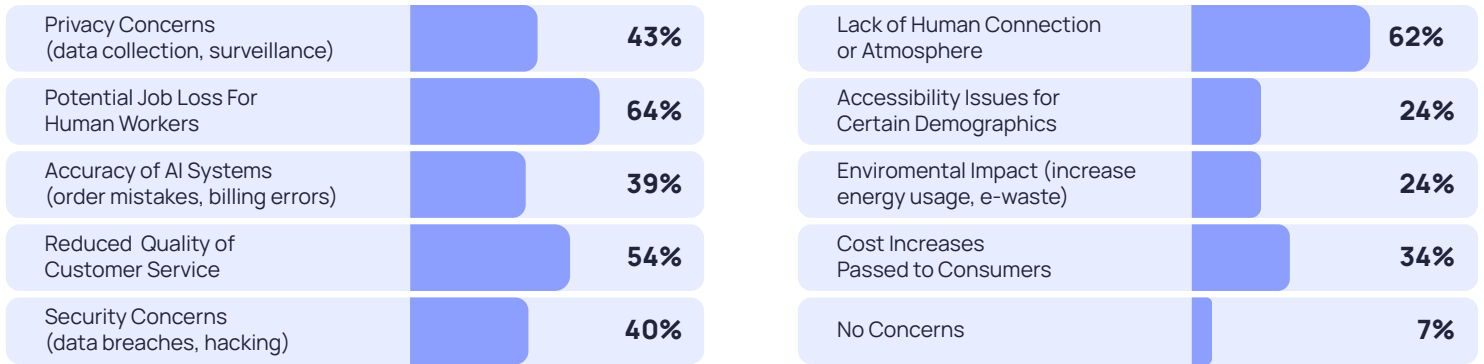
Takeaway:

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 Count Column %	108 11%	77 15%	31 6%
Somewhat Agree Count Column %	146 15%	92 18%	54 11%
Neither Agree nor Disagree Count Column %	144 14%	81 16%	63 13%
Somewhat Disagree Count Column %	218 22%	105 21%	113 23%
Strongly Disagree Count Column %	384 38%	151 30%	233 47%

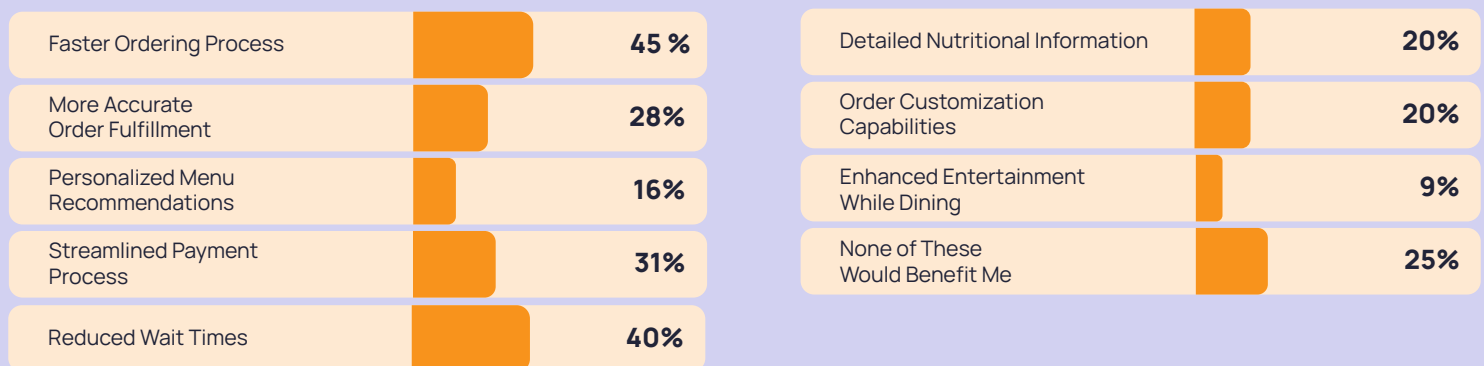
	Total	Baby Boomers: Born 1946-1964 (58-76 years old)	Generation X Born 1965-1980 (42-57 years old)	Millennials: Born 1981-1996 (26-41 years old)	Generation Z: Born 1997-2012 (10-25 years old)	Other (77+)
Sample Size	1000	218	287	322	139	34
Strongly Agree Count Column %	108 11%	7 3%	25 9%	53 16%	23 17%	0 0%
Somewhat Agree Count Column %	146 15%	19 9%	40 14%	62 19%	23 17%	2 6%
Neither Agree nor Disagree Count Column %	144 14%	34 16%	43 15%	41 13%	24 17%	2 6%
Somewhat Disagree Count Column %	218 22%	55 25%	64 22%	56 17%	35 25%	8 24%
Strongly Disagree Count Column %	384 38%	103 47%	115 40%	110 34%	34 24%	22 65%

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

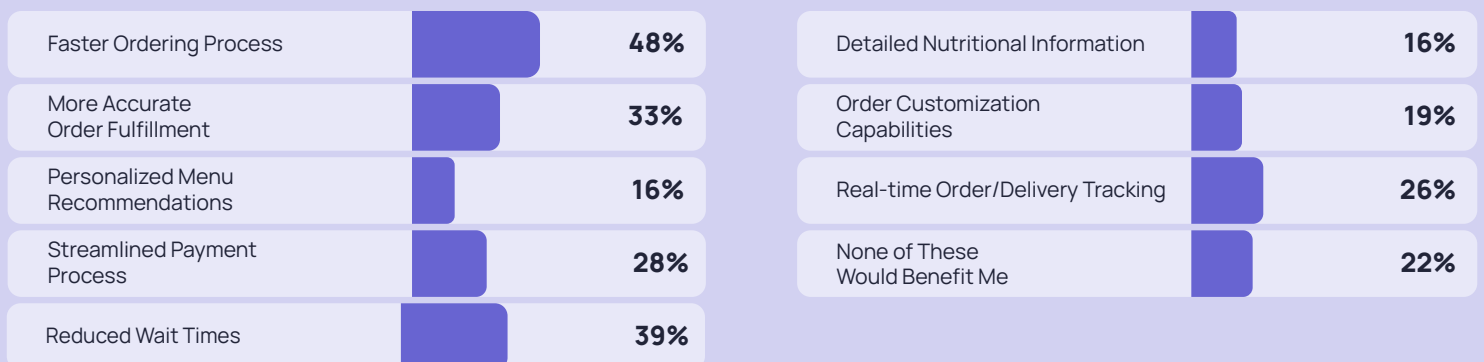


Respondents also shared two main concerns about AI in restaurants, which are the potential job loss for human workers (64%) and the lack of human connection or atmosphere (62%).

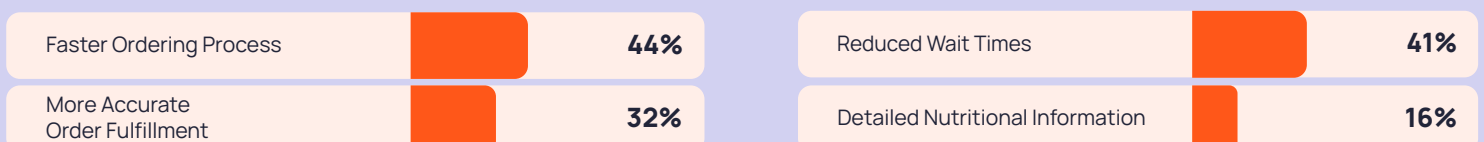
When dining in at a restaurant, which aspects would benefit you the most when incorporating AI and technology? (Select all that apply)

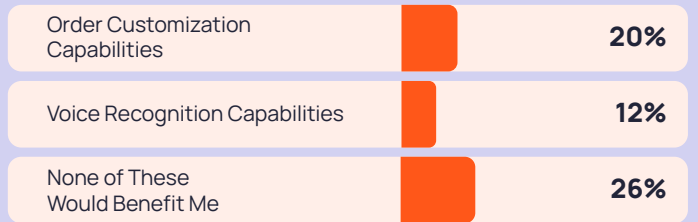
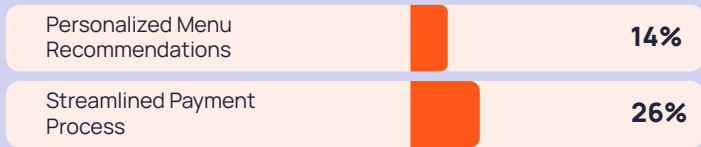


When ordering takeout or delivery, which aspects would benefit you the most when incorporating AI and technology? (Select all that apply)



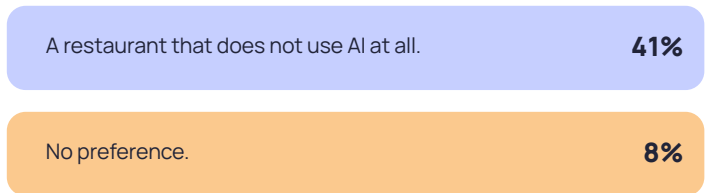
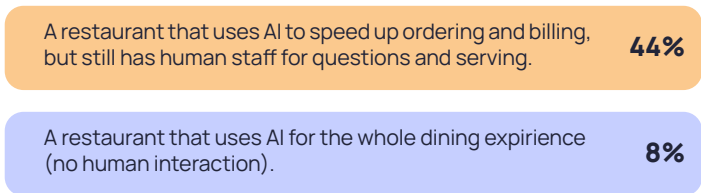
When using a drive-thru, which aspects would benefit you the most when incorporating AI and technology? (Select all that apply)





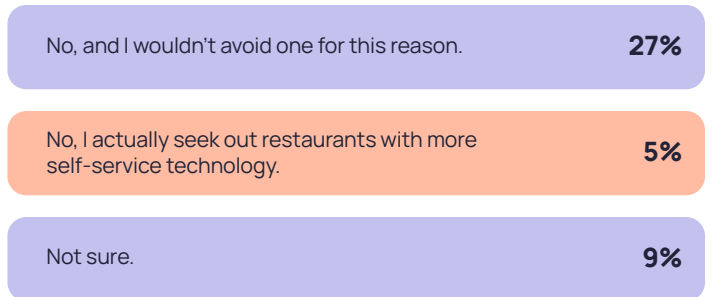
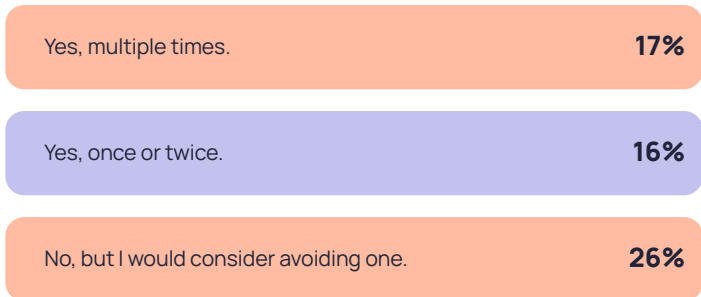
Respondents indicated that AI and technology could significantly speed up the ordering process across various scenarios: **takeout or delivery** (48%), **dining in** (45%), and **drive-thru** (44%). Additionally, reduced wait times were highlighted as a key benefit: **drive-thru** (41%), **dining in**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

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



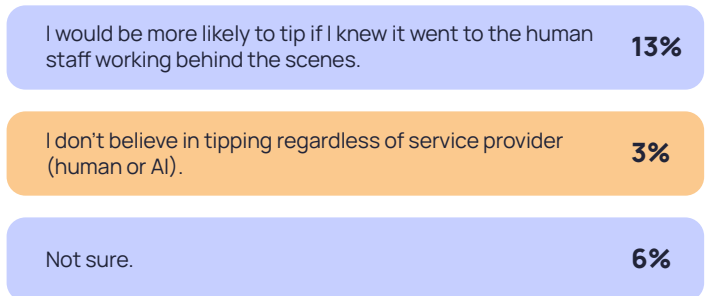
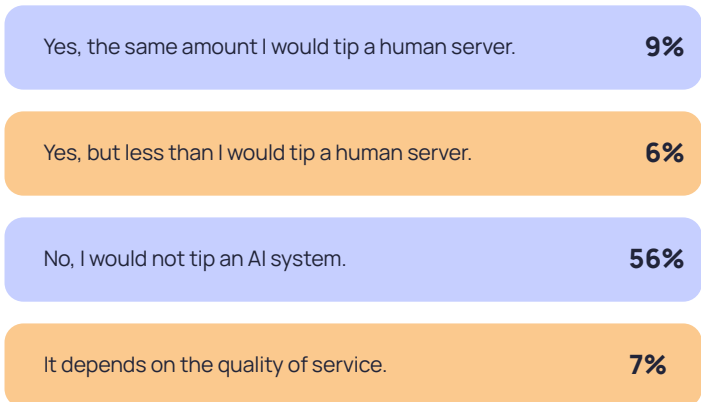
44% favor a balance of human staff and some technology versus 41% who prefer no AI use at all in their dining experience.

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



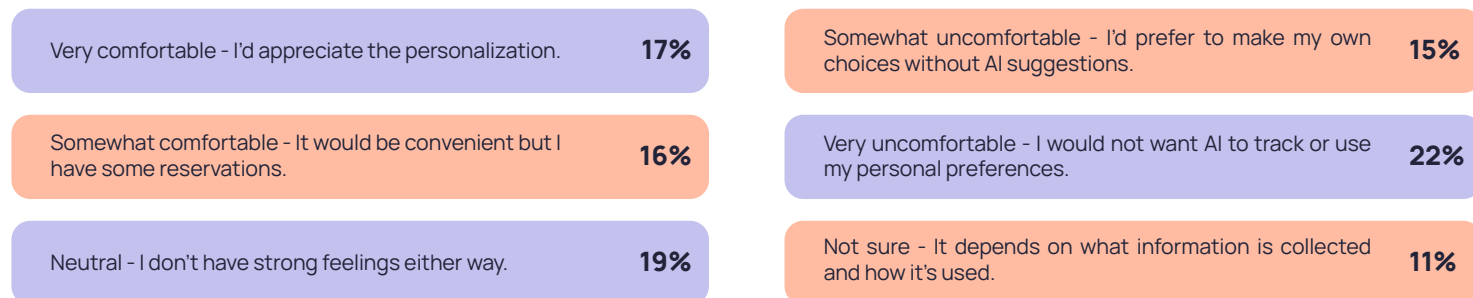
33% of all respondents have avoided restaurants because of too much self-service technology.

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



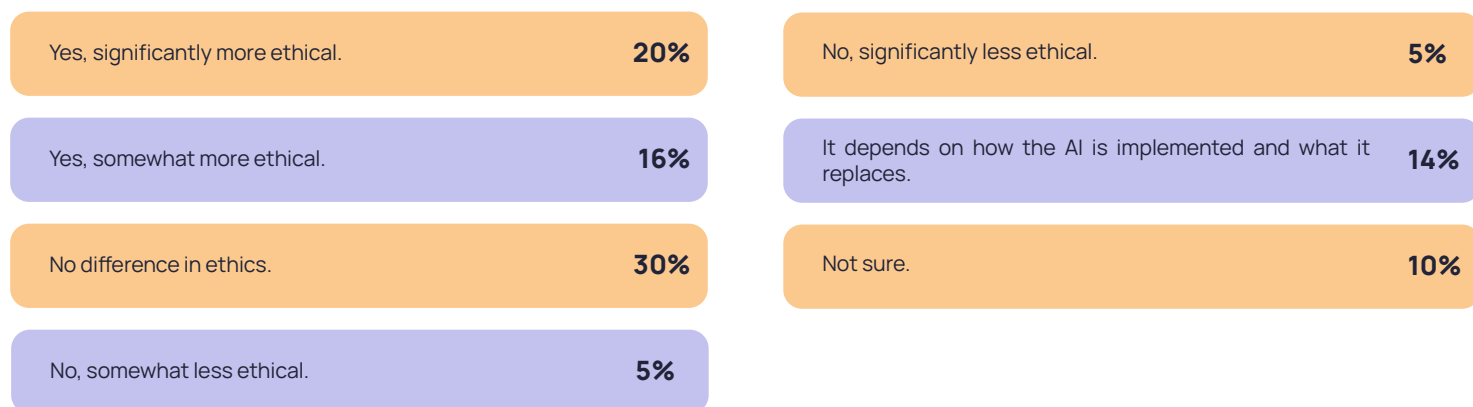
56% of all respondents would reportedly not tip an AI system, while 22% would either tip or at least consider tipping, depending on the service.

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



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?



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

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