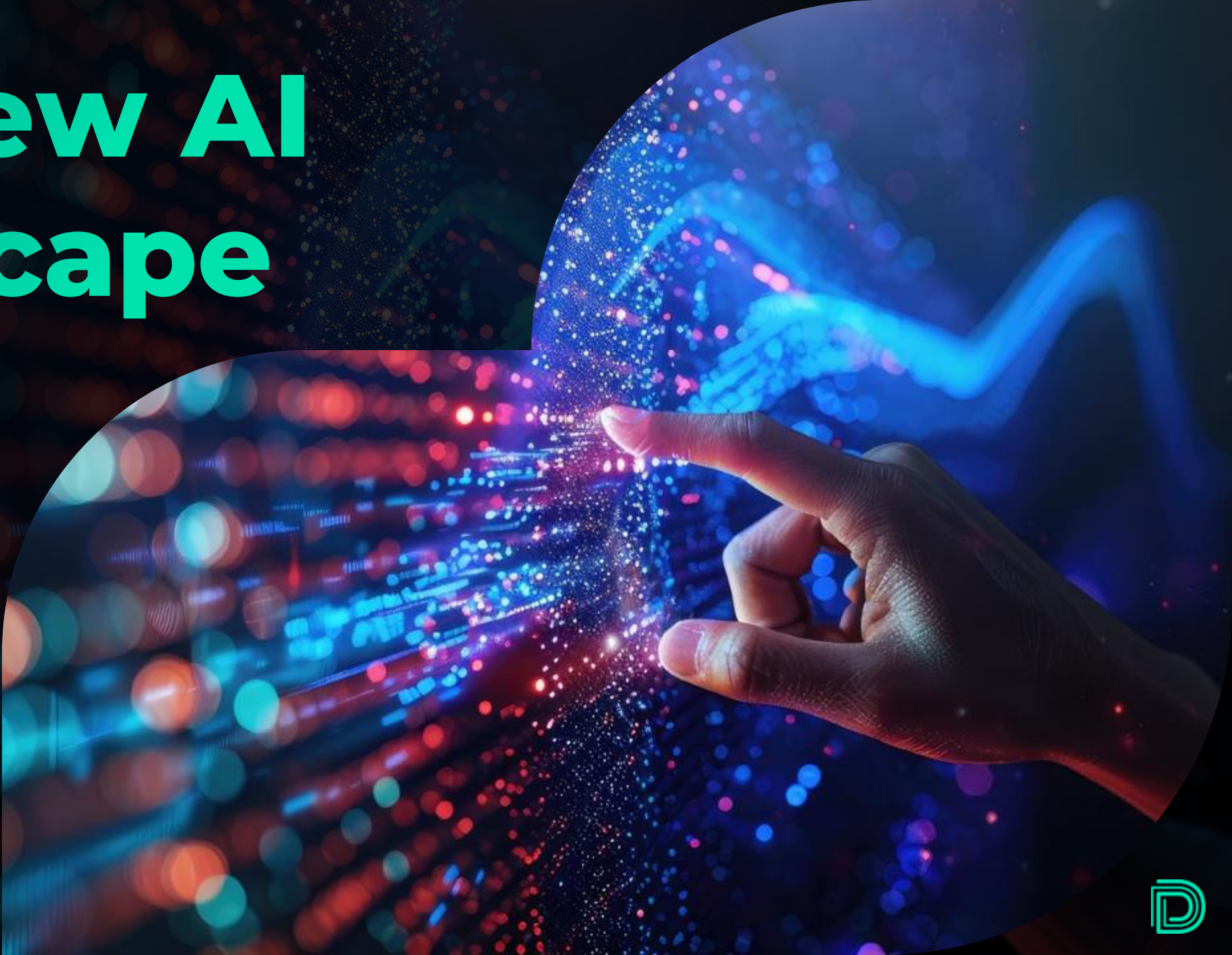


The New AI Landscape

A hand is shown interacting with a futuristic digital interface. The interface is composed of glowing blue and red lines, dots, and particle effects, suggesting a complex data or AI environment. The background is dark with bokeh light effects.

HOTSHOT REPORT

Published February 2025



About This Report

In 2023, when generative AI started to soar in popularity, Datassential published a study examining its role in foodservice and society at large. Since then, the AI revolution has progressed at breakneck speed, with no signs of slowing. In 2025, anyone with internet access can tap into AI instantly, and new models each more powerful than the last are flooding the market. The latest devices and appliances – from your smartphone to your stovetop – are arriving with AI functions built-in. Soon, a new age of “agentic AI” will likely transform our relationship with technology altogether. With this in mind, how have consumer and operator perspectives on AI changed since 2023, and what do they think an AI-powered future will look like? Read on to find out more. **The data populating this report was fielded through Datassential’s Omnibus in October 2024 with 1,501 “gen pop” US consumers & 434 foodservice decision makers.**

Key Takeaways:

1. Artificial intelligence is rapidly broaching the mainstream: nearly 75% of consumers and 70% of foodservice operators claim to be at least somewhat familiar with this technology. More consumers than ever are using AI for personal and creative tasks, from searching for information and editing text to generating images and videos.
2. Interest in AI-driven foodservice applications is also fairly high, particularly those that can enhance or automate complex back-of-house operations like food safety monitoring, customer feedback analysis, or inventory management. Interest in leveraging AI for recipe development – both at home and in commercial kitchens – has also grown since 2023. While most operators don’t see AI surpassing humans anytime soon, many consumers believe AI can be better than human chefs at creating healthy and nutritious recipes, even if those dishes lack the flavor and cultural authenticity of human-made meals.
3. AI is increasingly embedded in many facets of public life, from banking and healthcare to entertainment and law enforcement. At the same time, AI is also reshaping how consumers search for information and connect with the world, from enhancing search engines to being built directly into the latest smartphones. It may be impossible for consumers to truly avoid AI in the future, so the industry must ensure that AI innovation feels meaningful, rather than overwhelming or overhyped.
4. Despite AI’s rapid rise, many consumers remain cautious about its broader impact, particularly when it comes to issues like data privacy, misinformation, or environmental harm. Operators also share these sentiments and are worried that AI could potentially disrupt everything they know and love about foodservice. However, those with more AI knowledge and experience tend to be more optimistic, believing its long-term benefits will ultimately outweigh the risks.

The New AI Landscape

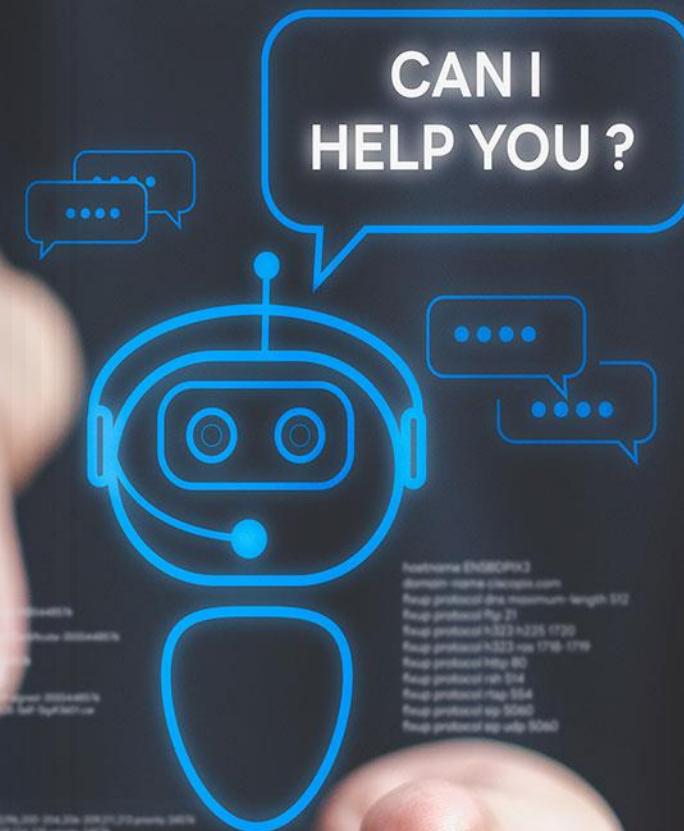
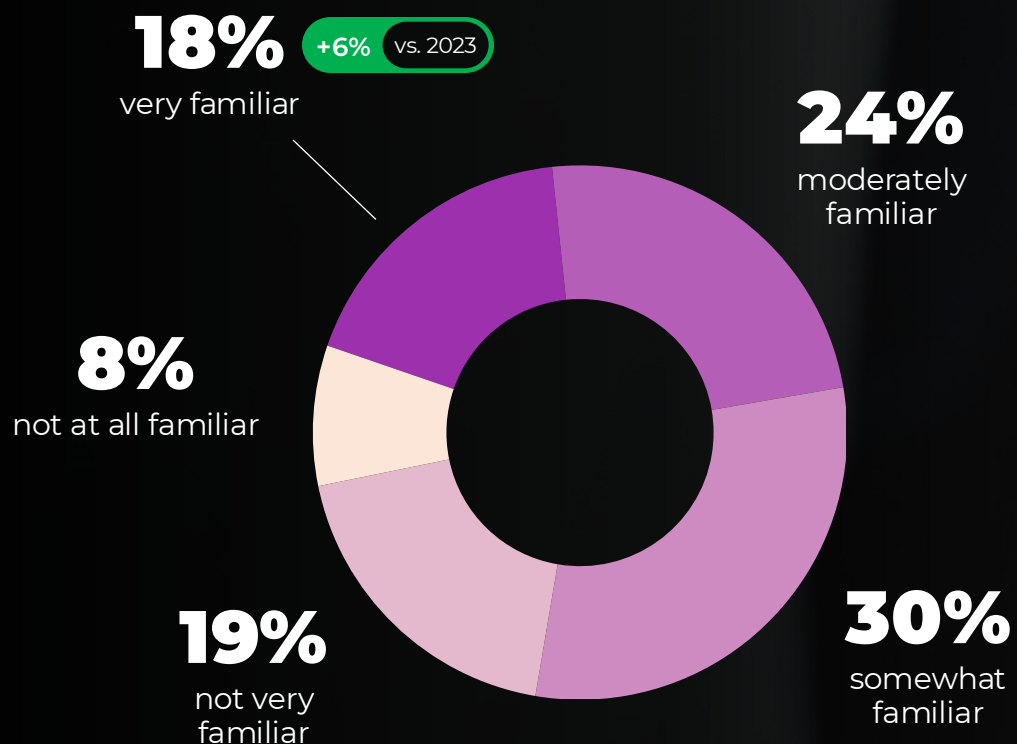
01

CONSUMER
PERSPECTIVES



Consumer exposure to AI is increasing: Nearly three-quarters are at least somewhat familiar with this technology.

Similar to 2023 (when generative AI technology was just entering the mainstream) men, Gen Z, and Millennial consumers are far more likely than other demographics to report being “very” or “moderately” familiar with AI.



Consumer experience with some AI touchpoints (products, media, etc.) has also risen since 2023.

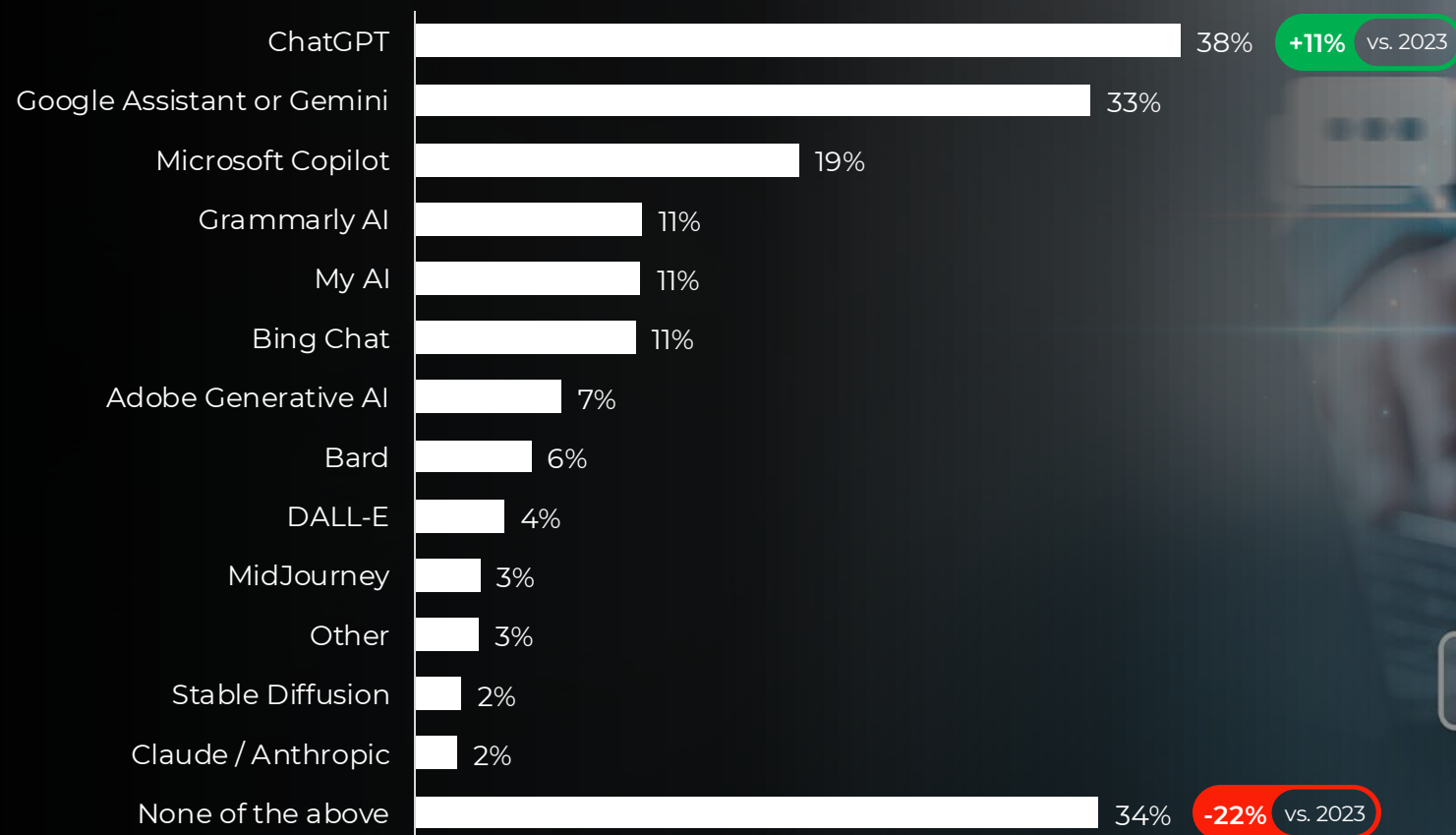
In the past six months, three-quarters have encountered AI in some form (news, social media, friends and family, etc.), and nearly one-third have directly interacted with it. Gen Z leads in direct engagement, while Boomers are the generation with the least AI exposure.

	2023	2024	1-year change
Had a conversation with someone (friends, family, etc.) about AI	36%	35%	-1%
Read an article or watched a news segment about AI	40%	34%	-6%
Saw a post on social media about AI	34%	33%	-1%
Personally interacted with or used AI technology (ChatGPT, etc.)	21%	29%	+8%
Interacted with an AI chatbot (customer service, etc.)	25%	28%	+2%
Saw a video or social media post that you know, or suspect, was created by AI	21%	25%	+4%
Read an article online that you know, or suspect, was written by AI	17%	17%	0%
Read or saw something (books, music, movies, etc.) that was recommended by AI	16%	16%	0%
Purchased a device with built-in AI functions (smartphone, VR headset, etc.)	N/A	9%	N/A
My workplace introduced an AI software or service (even if I don't directly use it)	N/A	7%	N/A
None of the above	25%	25%	0%

Q: In the past six months, have you experienced any of the following scenarios?

Among AI platforms and services consumers have tried, ChatGPT remains the most popular.

Nearly two in five consumers have utilized ChatGPT in some capacity – a sharp 11% increase compared to our 2023 findings. In keeping with general attitudes towards AI, Gen Z and Millennials are significantly more likely than older consumers to have experimented with any generative AI platform.



Command Prompt :

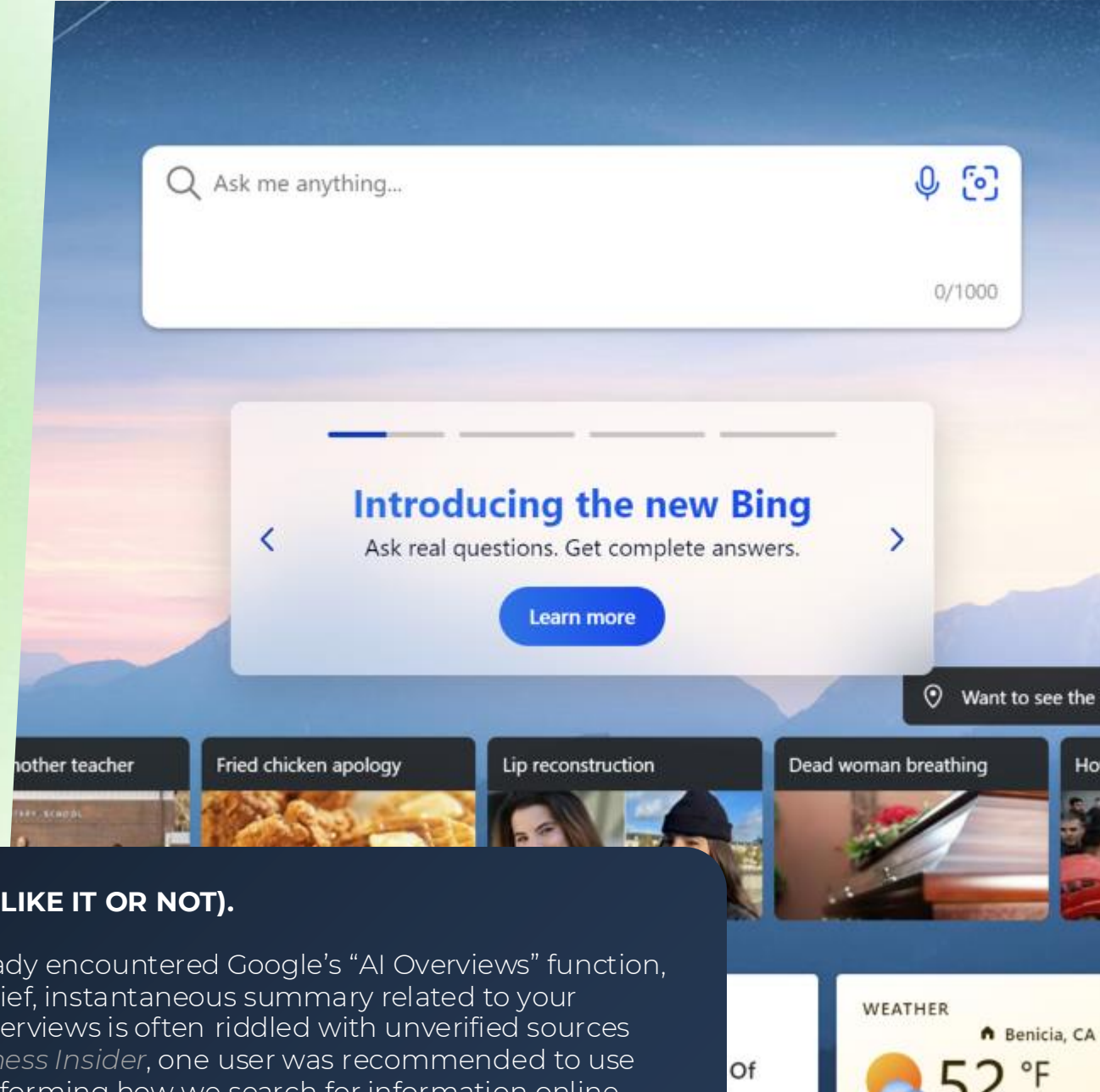
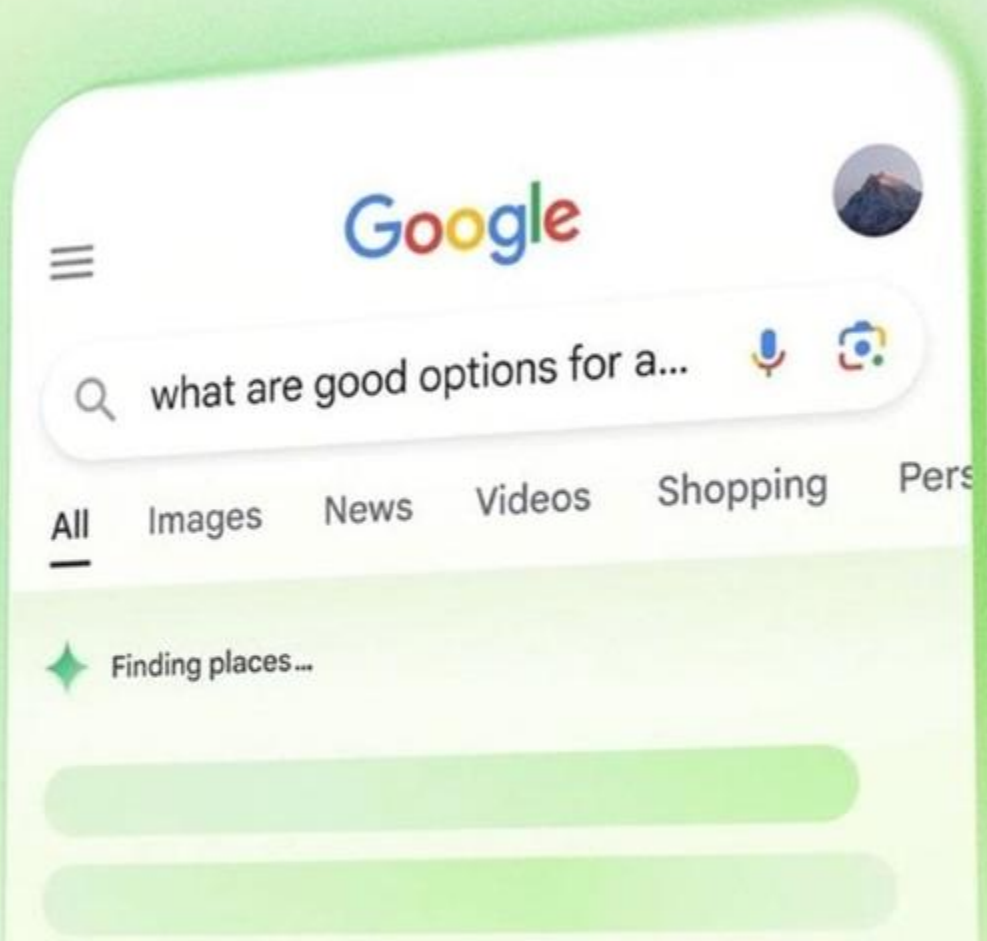
Since 2023, more consumers have embraced AI for personal, administrative, and creative purposes.

Across all surveyed tasks, consumers have had the most experience (and the highest interest in) utilizing AI to search for information, translate languages, or edit written work. Like in 2023, consumers still prefer AI as a tool to enhance or streamline existing tasks rather than fully automate them. Overall, men, Gen Z, and Millennials are typically more likely than their demographic counterparts to be adopters of AI.

Interest and usage of AI for content generation have also risen, particularly for images and written work like essays. Adoption of AI for more specialized generative tasks (e.g., video, music, 3D modeling) remains lower, largely because fewer people need to create such content.

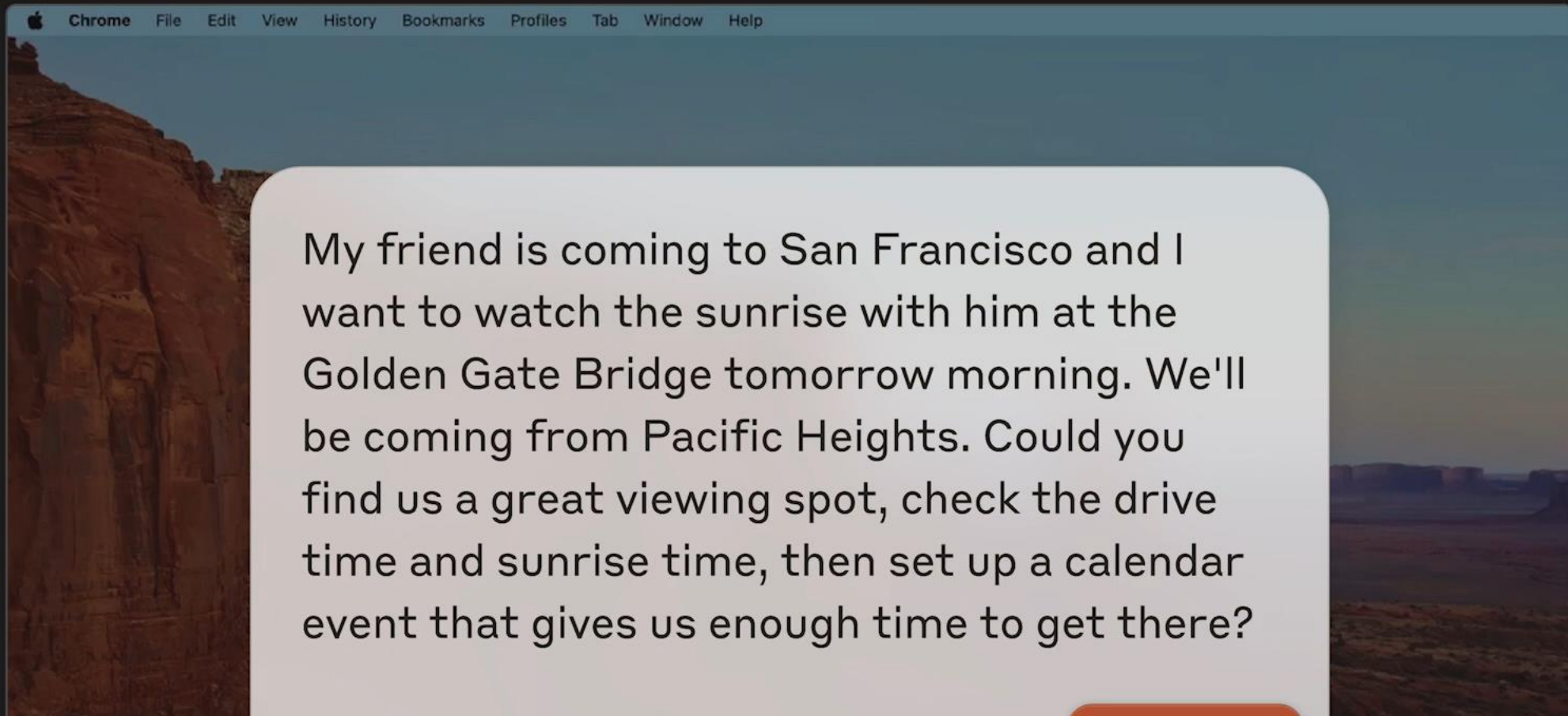
	Have Used AI For This			Would Be Interested		
	2023	2024	1-year change	2023	2024	1-year change
Searching for new information	23%	38%	+16%	41%	33%	-8%
Translating languages	16%	25%	+8%	44%	42%	-2%
Editing text (for style, grammar, etc.)	16%	27%	+11%	41%	39%	-2%
Brainstorming ideas	12%	24%	+11%	39%	38%	-1%
Generating or editing images	14%	22%	+8%	38%	38%	0%
Help with communication (writing text messages, emails, etc.)	15%	24%	+10%	36%	35%	-1%
Summarizing complex or dense topics	10%	22%	+11%	39%	36%	-3%
Writing (essays, articles, etc.)	11%	20%	+9%	37%	37%	0%
Creating technical functions (spreadsheets, formulas, decks, etc.)	9%	15%	+6%	40%	40%	0%
Automating tasks or workflows	8%	14%	+6%	39%	39%	0%
Making or editing videos	7%	13%	+6%	38%	40%	+2%
Making or editing audio / music	8%	12%	+4%	35%	39%	+4%
Creating 3D models or objects	7%	11%	+5%	37%	39%	+2%
Coding and programming	8%	12%	+5%	34%	36%	+2%
Creating automated voiceovers	6%	11%	+5%	33%	36%	+3%

Q: Have you used AI to accomplish the following tasks? If not, would you in the future?



SEARCHING FOR SOMETHING? AI'S GOT YOUR BACK (WHETHER YOU LIKE IT OR NOT).

If you've made a Google search any time after May 2024, you've likely already encountered Google's "AI Overviews" function, which overtakes the top of your screen and utilizes Gemini to provide a brief, instantaneous summary related to your query. Many users, however, have already learned the hard way that AI Overviews is often riddled with unverified sources (like Reddit threads), plagiarism, and false information: according to *Business Insider*, one user was recommended to use non-toxic glue to thicken their pizza sauce. The reality is: AI is rapidly transforming how we search for information online, with no signs of slowing down; we're likely just in the "Wild West" period before the real "future of search" materializes.

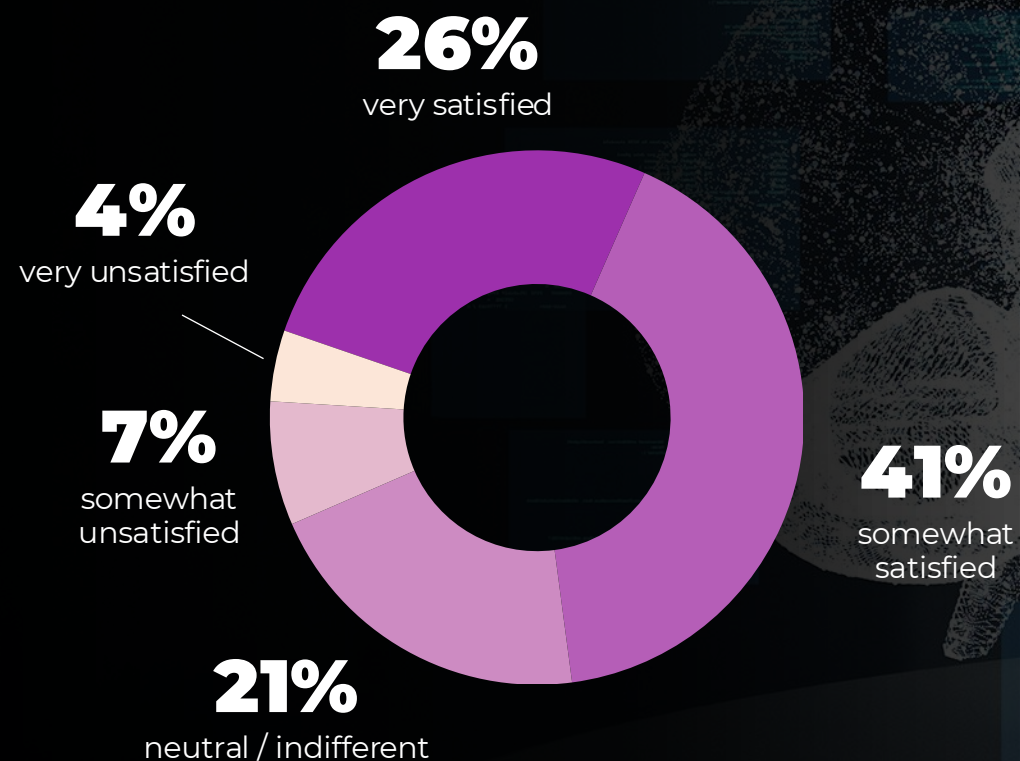


LIFE IN THE NEW ERA OF AGENTIC AI

At present, many experts speculate that “agentic AI” will signal the next leap forward in the world of AI. Unlike current models, which are typically constrained by rules and limited user input, agentic AI agents are more proactive, capable of “autonomously performing tasks on behalf of a user,” with the “agency to make decisions, take actions, solve complex problems and interact with external environments” beyond its training data, writes *IBM*. What does this mean for the future? To start: the potential for AI agents that are even more intelligent and collaborative. Think AI assistants that can thoroughly plan an overseas trip, or a supply-chain specialist that can optimize inventories in response to market fluctuations, speculates *Harvard Business Review*.

Over two-thirds of consumers who have utilized AI in the past say they're generally satisfied with their experience.

This is the case among nearly three-quarters of men, Millennials, and Gen X users. Boomers are the most likely generation to express dissatisfaction with their AI usage, while nearly 30% of Gen Z were neither impressed – nor let down – by their experience.



Q: You indicated that you've previously interacted with or used AI technology in the past. How satisfied were you with that experience?

**33%**

of consumers find that content written or created by generative AI tools (ChatGPT, etc.) is generally trustworthy – 29% disagree.

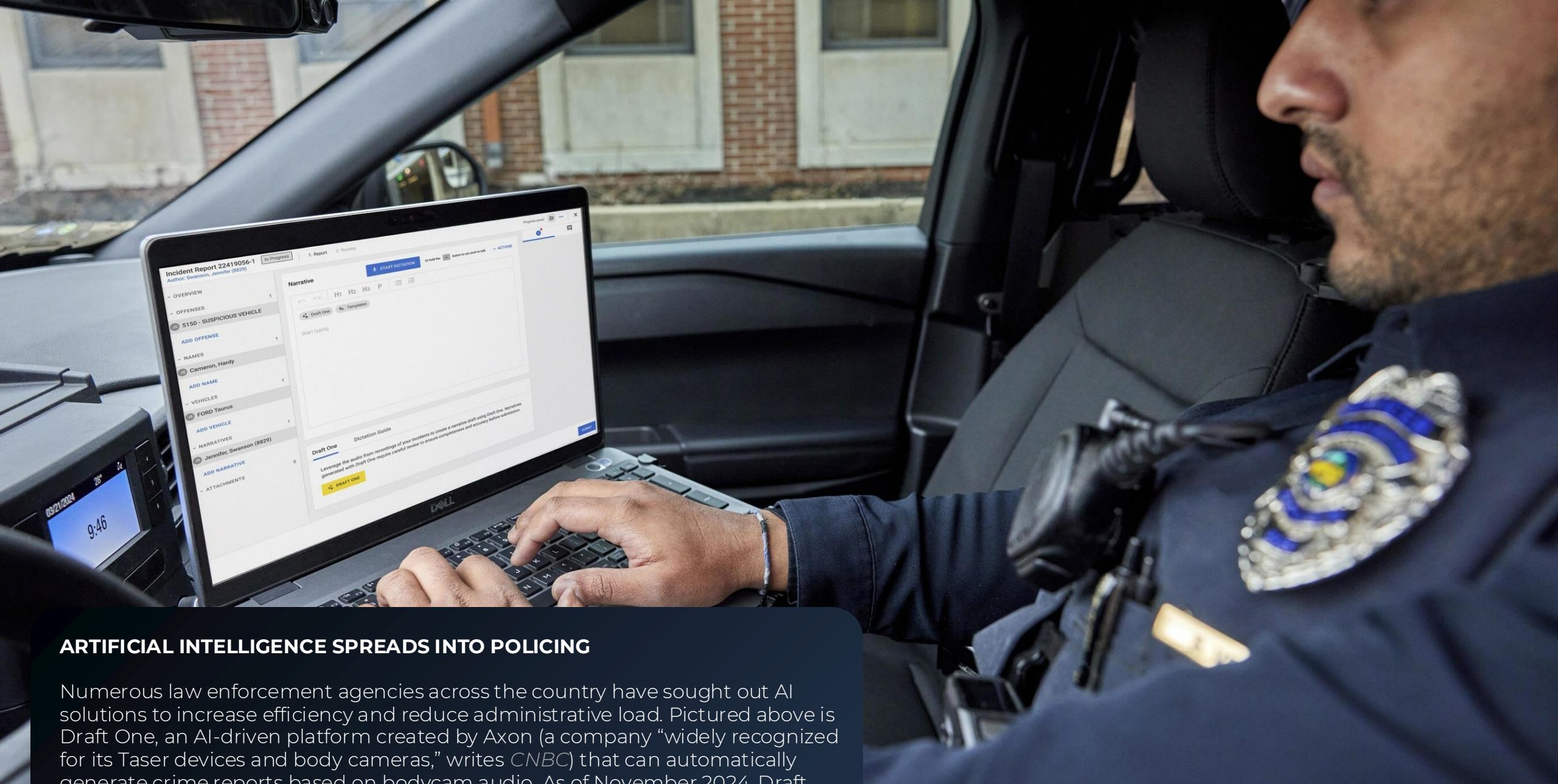
AI is expanding into many facets of public life, and consumer opinions are mixed.

Consumers are generally most supportive of AI in large-scale, computational initiatives like weather forecasting, economic modeling, or detecting illegal online activity. In contrast, opposition outweighs support for AI applications that could directly impact individuals, such as law enforcement, judicial proceedings, and administering medical treatments. Resistance to AI-generated deepfakes and commercial media (music, movies, TV) is also high, likely influenced by recent strikes and controversies across the entertainment industry.

Interestingly, support for initiatives that would require giving AI access to personal data (e.g., banking information, medical records, job history and resume, etc.) is decent despite broad cultural concerns around data privacy. Perhaps this is because some consumers assume such data was already used in computational systems before the AI era.

Overall, men, Gen Z, and Millennials continue to be the most supportive of AI-driven public initiatives.

	Support	Oppose	NET
Search the internet & social media to get rid of illegal content, scams, and potential crime	55%	19%	35%
Police work and law enforcement	31%	43%	-12%
Assist the judicial system	30%	42%	-12%
Assist political campaigns and create messaging	26%	43%	-17%
Weather forecasting	51%	21%	30%
Use your medical information to recommend treatments, diets, etc.	41%	31%	10%
Economic analysis and forecasting	41%	26%	15%
Manage money on your behalf (banking, investing)	33%	40%	-7%
Administer medical treatments in hospitals (tests, surgeries, etc.)	32%	43%	-12%
In schools and colleges (create lesson plans, grade, etc.)	37%	34%	2%
Filter and evaluate job applications	35%	35%	0%
Filter and evaluate college applications	31%	37%	-7%
Create ads and marketing campaigns	38%	28%	10%
Create artwork and photography for professional uses	35%	37%	-1%
Create virtual personalities that you can talk to	33%	36%	-3%
Make music or star in movies and TV shows	26%	47%	-21%
Recreate the voice, likeness, and personality of a real human	25%	48%	-23%



ARTIFICIAL INTELLIGENCE SPREADS INTO POLICING

Numerous law enforcement agencies across the country have sought out AI solutions to increase efficiency and reduce administrative load. Pictured above is Draft One, an AI-driven platform created by Axon (a company “widely recognized for its Taser devices and body cameras,” writes *CNBC*) that can automatically generate crime reports based on bodycam audio. As of November 2024, Draft One was being piloted by 75 officers across several departments, *CNBC* reports.



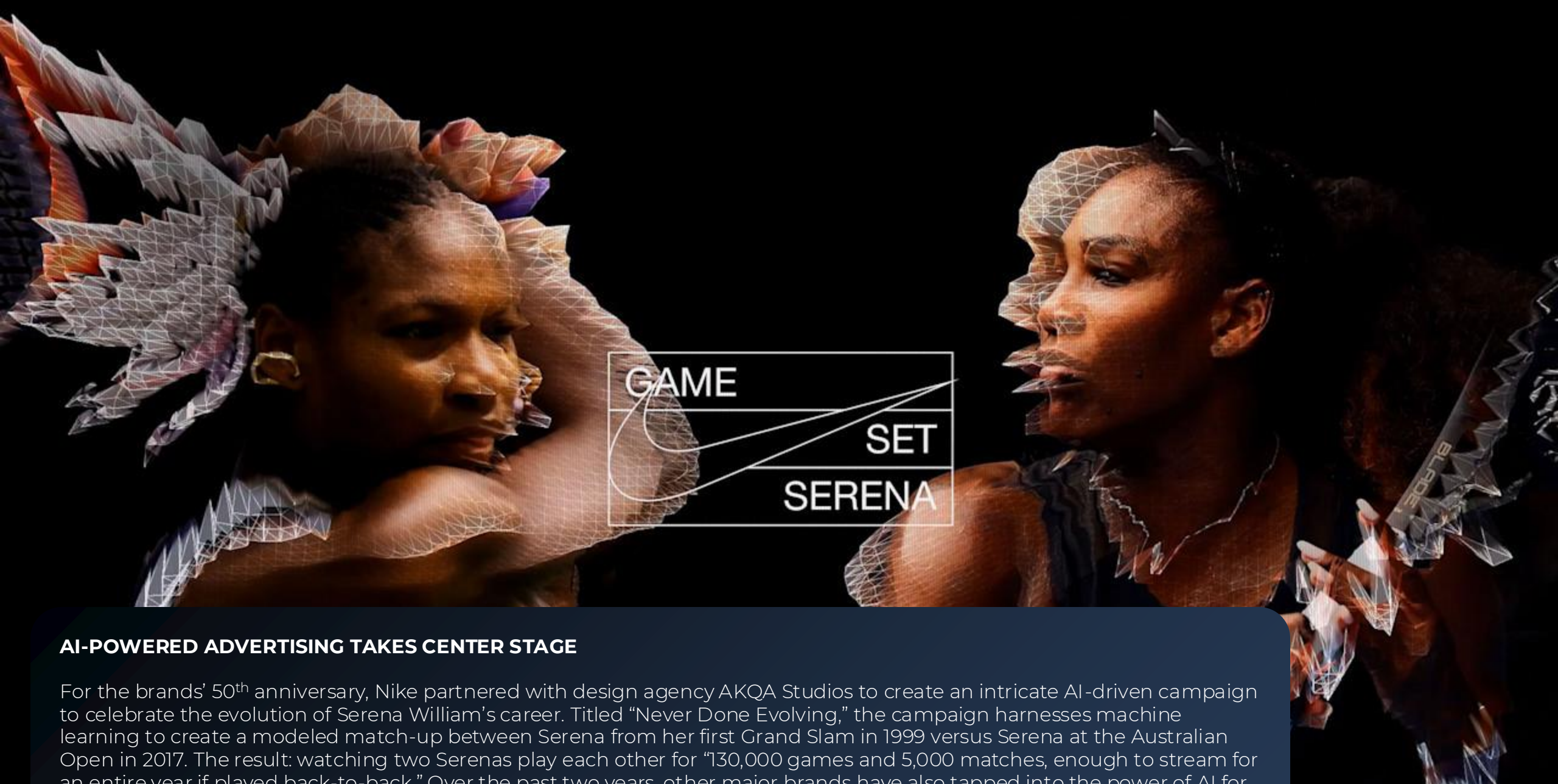
THE RAPID PROLIFERATION OF AI-POWERED MEDTECH

According to the agency's database, in 2024 alone, the U.S. Food & Drug Administration (FDA) approved nearly 200 new AI-enabled medical devices for market production, spanning many disciplines from radiology to cardiovascular health. Pictured left is **LumineticsCore**, an AI system that can diagnose diabetic retinopathy in patients living with diabetes, provide immediate results at the point-of-care, and require no specialists to operate. Pictured right is **Samsung's** newly-approved sleep apnea feature, which can utilize data on the Galaxy's (phone or watch) Health Monitor app to detect signs of sleep apnea before a proper sleep study.



MAKE YOUR MONEY WORK EVEN HARDER AND FASTER

With the rise of digital banking and personal finance or investment apps (e.g., Intuit, Rocket Money, Robinhood, etc.), many Americans have likely already entrusted technology to safeguard and grow their money. But with the emergence of AI, consumers are now entitled to a more sophisticated caliber of financial management. For example, Origin (pictured left) consolidates tax filing, estate planning, budgeting, and investment management into one app, with an AI sidekick capable of acting like a financial advisor, writes *Forbes*. Meanwhile, Albert (pictured right) combines a dedicated team of human expertise with AI-powered income and spending analysis, to help consumers find areas to save and set money aside.



AI-POWERED ADVERTISING TAKES CENTER STAGE

For the brands' 50th anniversary, Nike partnered with design agency AKQA Studios to create an intricate AI-driven campaign to celebrate the evolution of Serena Williams's career. Titled "Never Done Evolving," the campaign harnesses machine learning to create a modeled match-up between Serena from her first Grand Slam in 1999 versus Serena at the Australian Open in 2017. The result: watching two Serenas play each other for "130,000 games and 5,000 matches, enough to stream for an entire year if played back-to-back." Over the past two years, other major brands have also tapped into the power of AI for advertising – not just to generate beautiful assets, but also to unlock feats of creativity that can't be performed otherwise.

Consumer interest in foodservice AI solutions is growing, particularly for complex back-of-house operations.

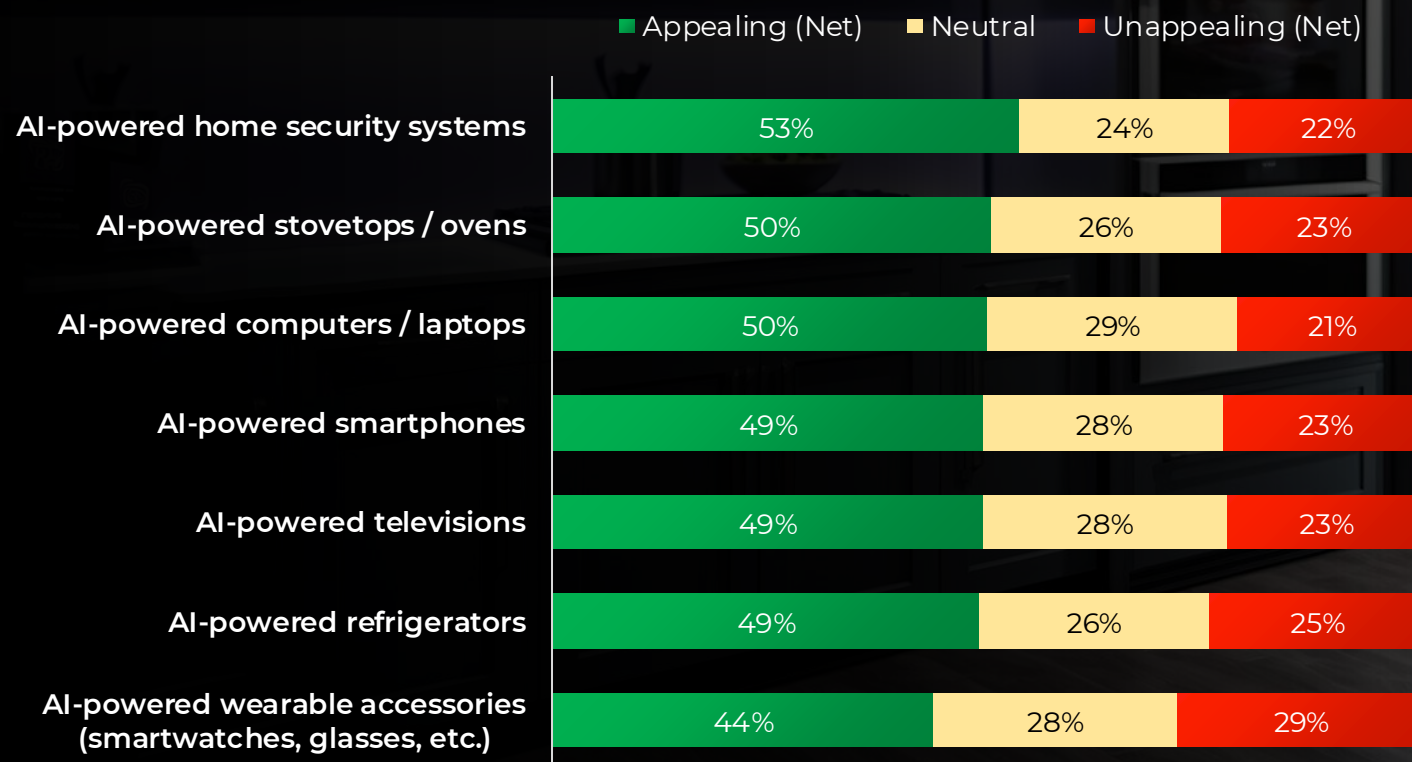
At present, consumers are most interested in seeing AI being leveraged by restaurants for complex and computational tasks like maintaining food safety standards, dynamic recommendations, or precise, last-minute menu adjustments. Since 2023, there has been a notable rise in interest in AI solutions that can develop recipes, design menus, take orders, and automate dynamic pricing, especially among Millennials.

	2023	2024	1-year change
AI-powered sensors that can monitor food safety standards in the kitchen	50%	52%	+2%
AI tool that recommends specials or discounts based on' purchase history	45%	48%	+3%
AI tool that can instantly adjust dishes around customers' dietary needs	42%	45%	+3%
AI tool that automatically incorporates seasonal, local, or trendy ingredients into a restaurant's menu	39%	43%	+4%
AI tool that automatically recommends dishes based on' ordering history	37%	42%	+5%
AI tool that can create recipes and design an entire menu	32%	40%	+8%
AI-powered chatbot that can take drive-thru, mobile, or digital orders	32%	39%	+7%
AI tool that can dynamically adjust menu prices based on demand or time of day	31%	38%	+7%
AI-powered virtual assistant that can take orders and provide customer service, instead of human waitstaff	30%	33%	+3%

Q: Below are several ways ai technology can be used by restaurants to improve their business. How appealing do you find these ideas? (top 2, 5 pt. Scale)

Roughly half of consumers are drawn to AI-enabled devices and appliances, both in and out of the kitchen.

Appeal is particularly high among men, Millennials, and Gen X. While many Gen Z consumers are intrigued by AI-powered gadgets like smartphones and computers, they may not yet have need for larger AI-driven home appliances such as stovetops or security systems.



Q: Below are several ways AI technology could be built into everyday devices. In general, how appealing do you find these concepts?



Pixel 9

Gemini



THE NEXT SMARTPHONE YOU GET WILL LIKELY COME WITH AI INCLUDED

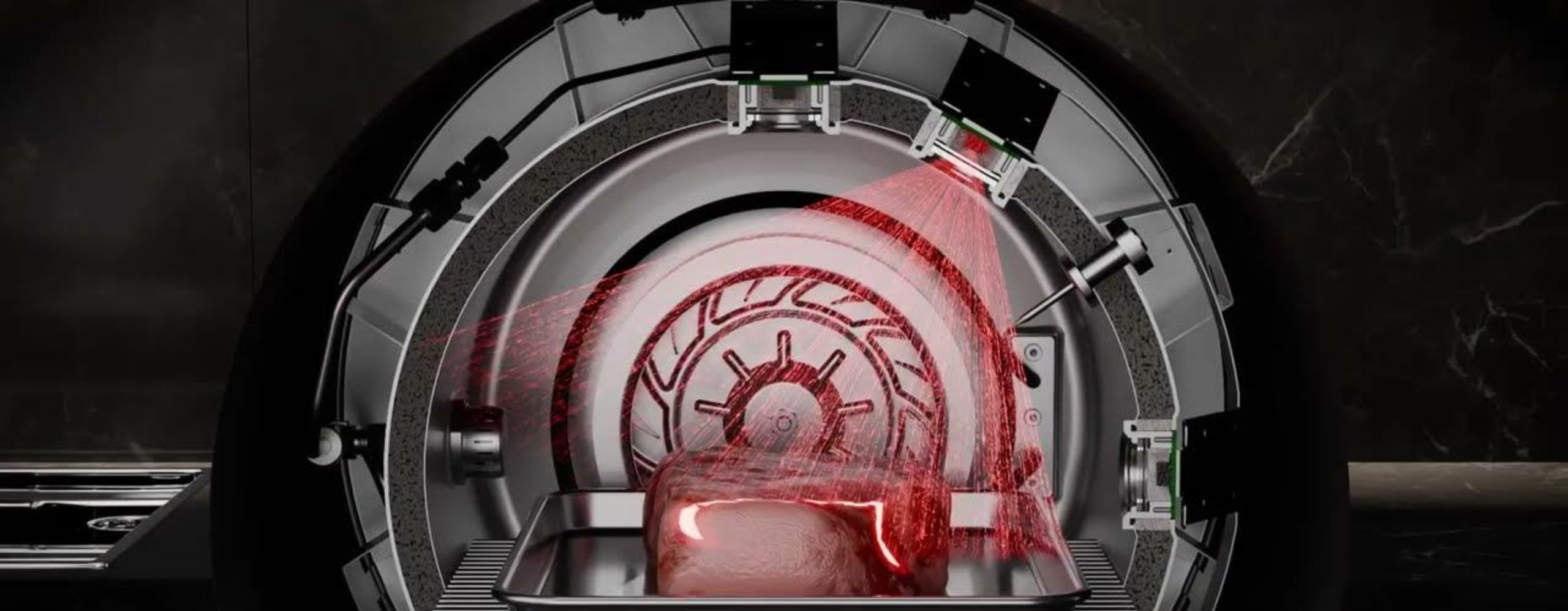
When generative AI first entered public consciousness, it manifested in external websites or services consumers can go to in search of artificial intelligence. Those days are already fading, as the latest commercial phones are now built with AI at their core. The latest models like the Samsung Galaxy S25, Google Pixel 9, iPhone 16, and Xiaomi 14 (arguably the most popular brands on the market) already come equipped with AI-driven features, such as enhanced processing speed and computational power, smarter virtual assistants, real-time transcription and translation, and advanced image and video editing.



SAMSUNG'S AI-POWERED REFRIGERATOR

In 2024, Samsung unveiled a new AI-powered refrigerator, the Bespoke 4-Door Flex fridge with AI Family Hub+. This fridge utilizes AI-powered inside cameras to recognize over 30 grocery items, monitor how long they've been in your fridge, track usage frequency and expiration dates, as well as suggest recipes based on available ingredients.





EVEN YOUR DAILY COOKING CAN BE AI-OPTIMIZED

Pictured above is a rendering of the Agari AI Smart Cooker, which debuted at the 2025 Consumer Electronics Show in Las Vegas. Promising to help everyday consumers prepare food with “No recipes, no timers, and no culinary degrees required,” the Agari uses 3D scanning technology to measure your food's shape and temperature and calculate a precise cooking time. Then, your food is pressure-cooked at an even, low temperature “3x faster than sous-vide,” before reverse searing for crust and texture. While the Agari is not yet commercially available, other AI-driven cooking robots and smart cookware are just starting to hit the market, like the Bosch Series 8 Smart Oven or Samsung's Bespoke Wall Oven.



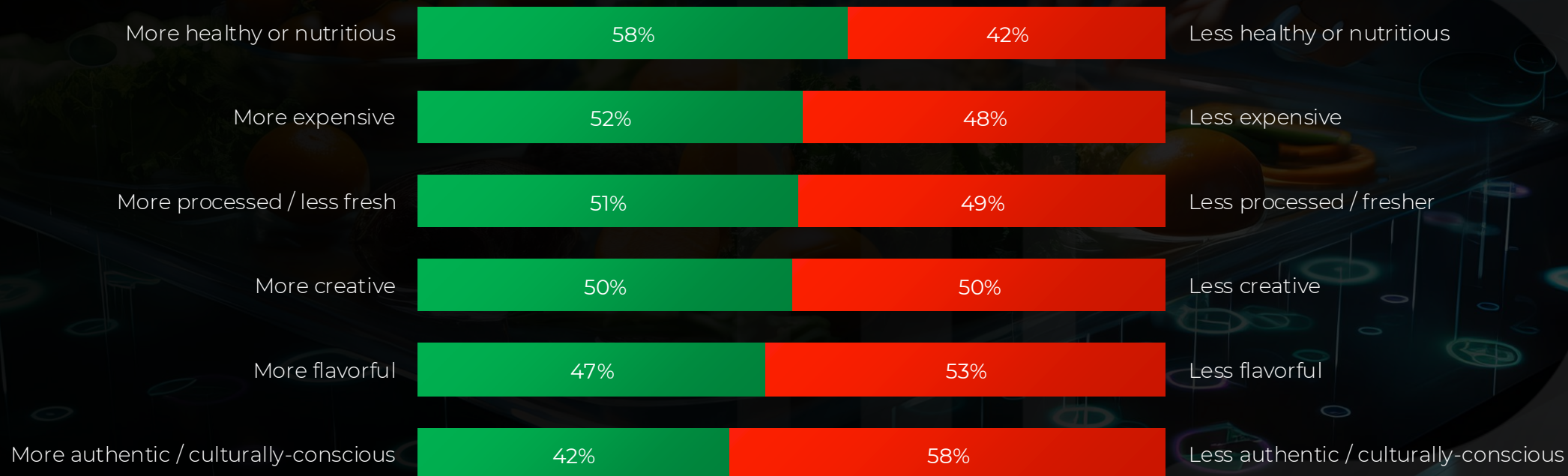
APPLE'S EXPRESSIVE ROBOT EXPERIMENT

In January 2025, Apple's Machine Learning Research team published a new paper which includes some prototype footage of a Pixar-like robotic desk lamp. In addition to accomplishing some utilitarian tasks (e.g.: lighting an object for photography, shining an outline on the wall for the tester to hang a frame, etc.), the robot lamp could also engage in “expressive” behavior, like tilting its “head” when listening to the tester, or figuratively looking outside the window to check the weather when asked – acting like a companion rather than a machine. *(Source: CNET / Apple)*

Consumers have surprising confidence in AI-generated recipes and food products, even when stacked against those created by human chefs.

Nearly 60% believe that AI is capable of developing healthier, more nutritious foods than humans, but would typically fall short in delivering flavor and cultural authenticity. This is likely because AI is seen as stronger in the “science” of nutrition than the “art” of cooking. When it comes to creativity, AI and human chefs are viewed as evenly matched.

Compared to Food Made by Humans, Food Made by AI Technology Is...



Q: Currently, how would you say food products, dishes, or recipes created using AI technology compare to products, dishes, or recipes created by human chefs?

The New AI Landscape

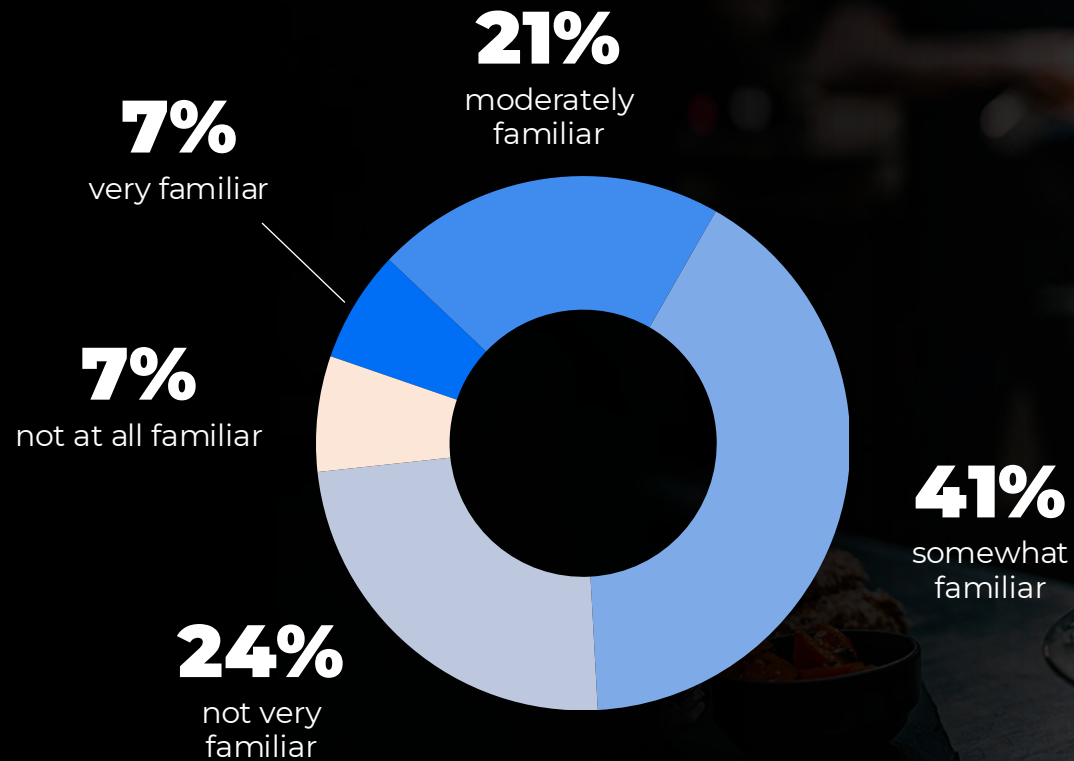
02

OPERATOR
PERSPECTIVES



Like consumers, over two-thirds of foodservice operators claim some level of AI familiarity.

However, unlike with consumers, overall familiarity among operators has not changed much since 2023. Decision makers in fine dining, healthcare, lodging, and C&U operations are most likely to self-report being moderately or very familiar with AI, while K-12 decision makers are the least confident about their AI knowledge.



Q: How would you describe your knowledge of and familiarity with AI technology?

Although most operators are aware of AI, exposure to – and adoption of – its more concrete business applications remains somewhat low.

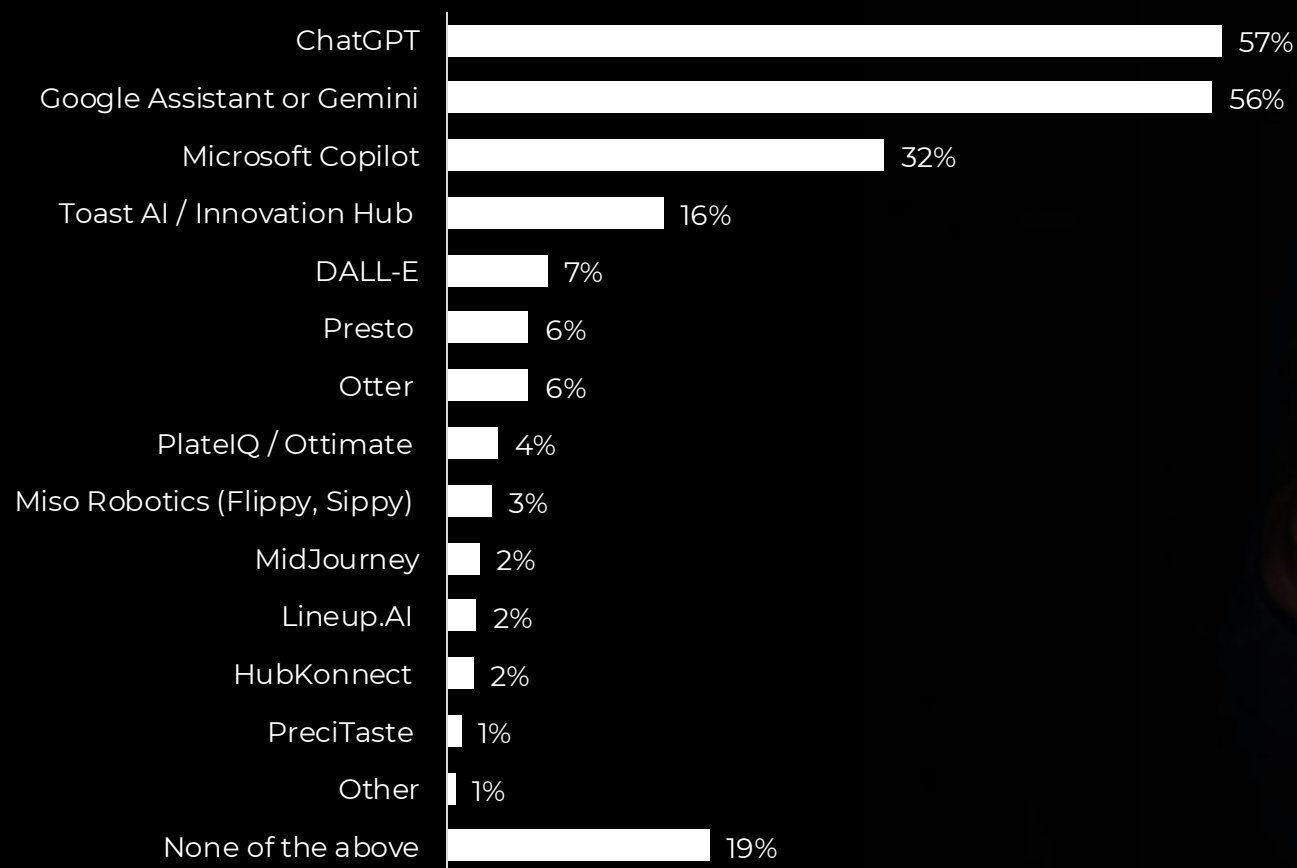
Nearly two-thirds of foodservice operators have not discussed or even researched incorporating AI into their processes, even if the movement is slowly picking up steam. Restaurants (25%) are far more likely than on-site operators (17%) to have received messages from or have seen ads about AI services.

	2023	2024	1-year change
Received communication or ads from companies offering AI-related tools services	15%	21%	6%
Used AI technology to accomplish a task or function related to your business	9%	12%	3%
Researched how to bring AI into your operation's processes	9%	11%	2%
Discussed bringing AI into your operation's processes with / among management	7%	7%	0%
Discussed bringing AI into your operation's processes with industry partners (suppliers, manufacturers, other foodservice venues, etc.)	6%	5%	-2%
Discussed bringing AI into your operation's processes with shareholders or investors	2%	3%	2%
None of the above	68%	63%	-5%

Q: In the past six months, has your operation experienced any of the following scenarios?

Operators are most familiar with public-facing generative AI platforms like ChatGPT, Gemini, or Microsoft Copilot.

Awareness of foodservice-specific platforms like Toast's Innovation Hub or Presto is considerably lower, especially for on-site operators.

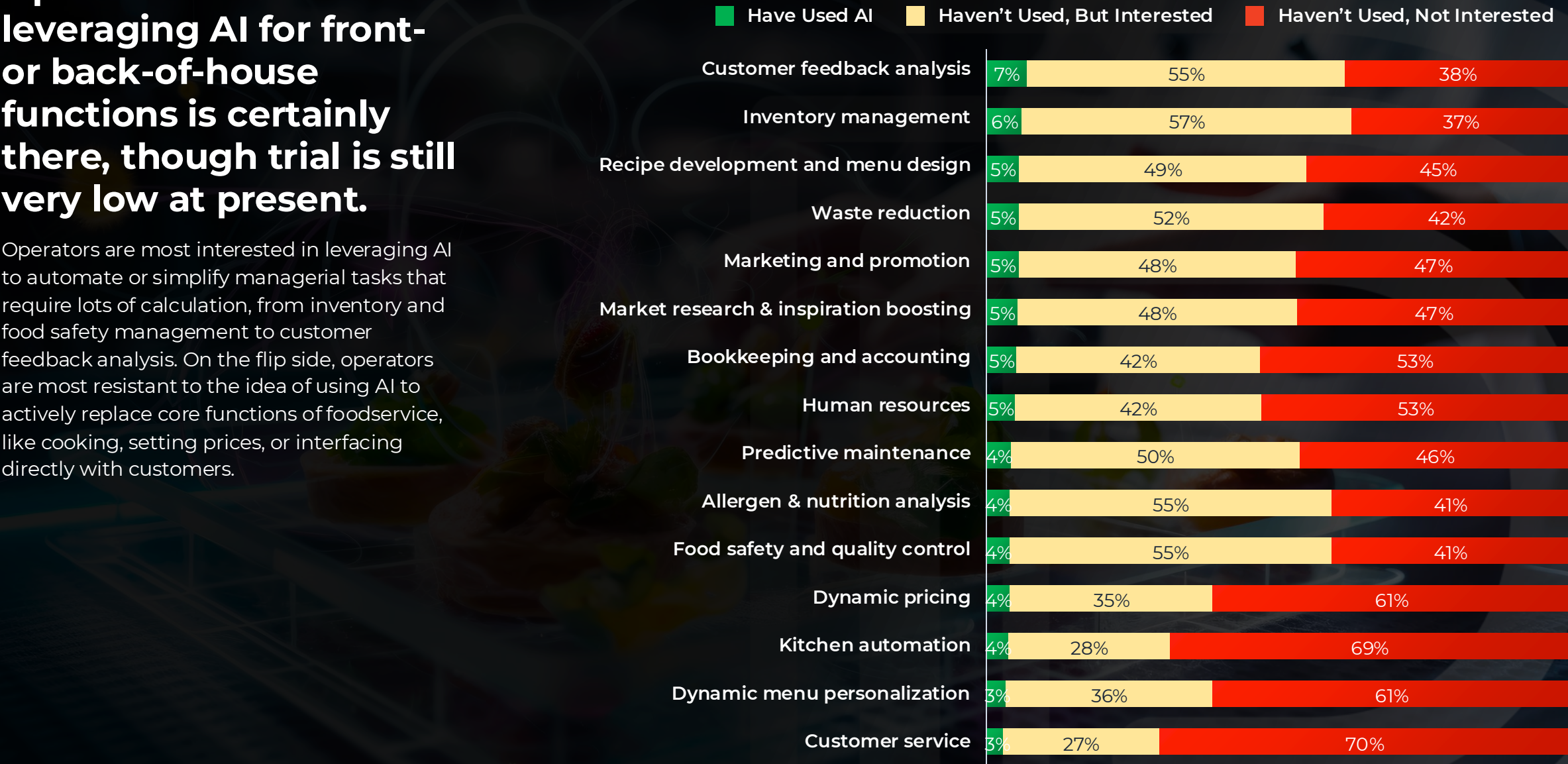


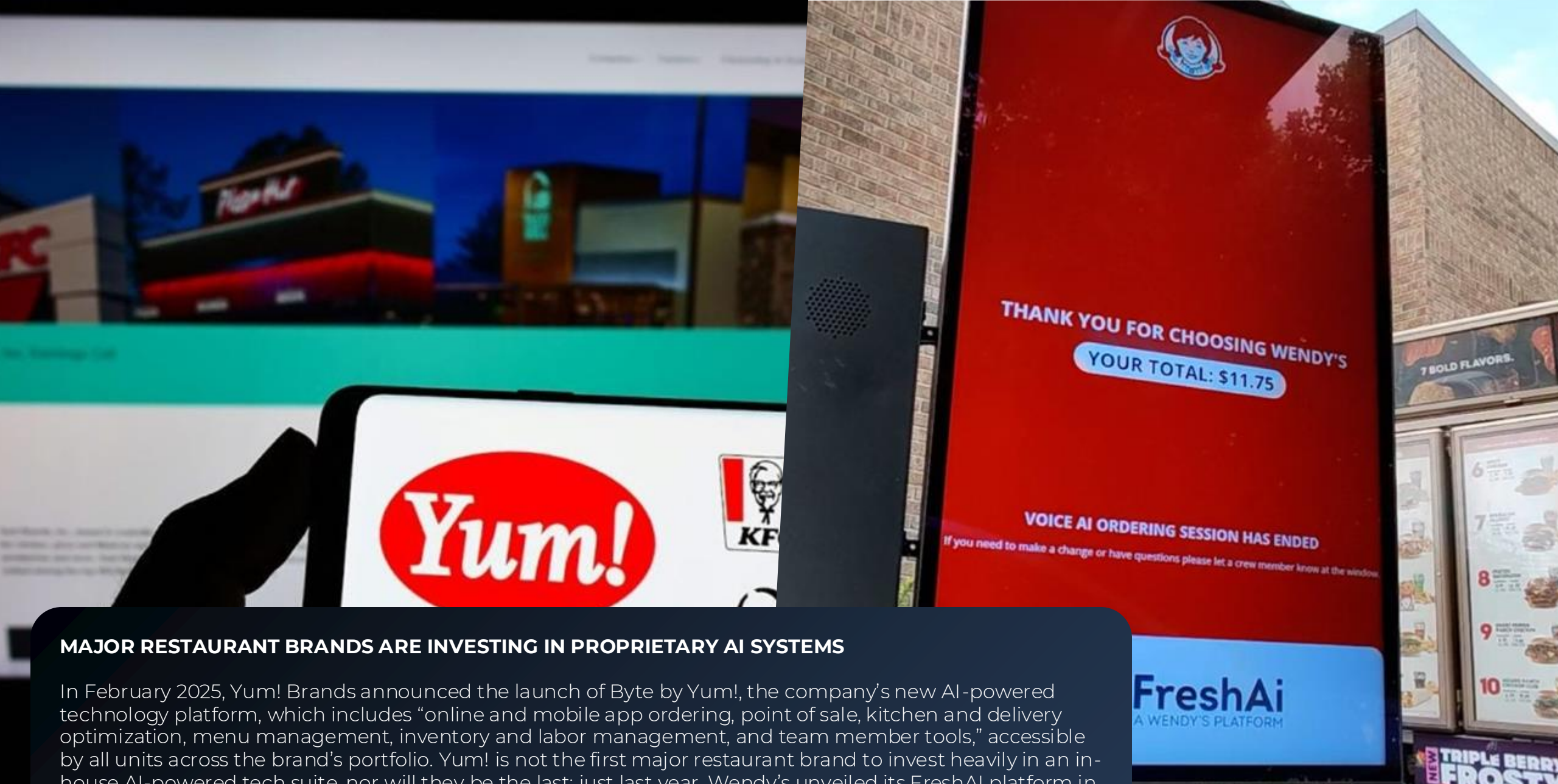
Q: Which of the following AI services or brands have you heard of?

Operator interest in leveraging AI for front- or back-of-house functions is certainly there, though trial is still very low at present.

Operators are most interested in leveraging AI to automate or simplify managerial tasks that require lots of calculation, from inventory and food safety management to customer feedback analysis. On the flip side, operators are most resistant to the idea of using AI to actively replace core functions of foodservice, like cooking, setting prices, or interfacing directly with customers.

Q: Have you previously used AI to accomplish the following tasks and processes? If not, would you be interested in the future?





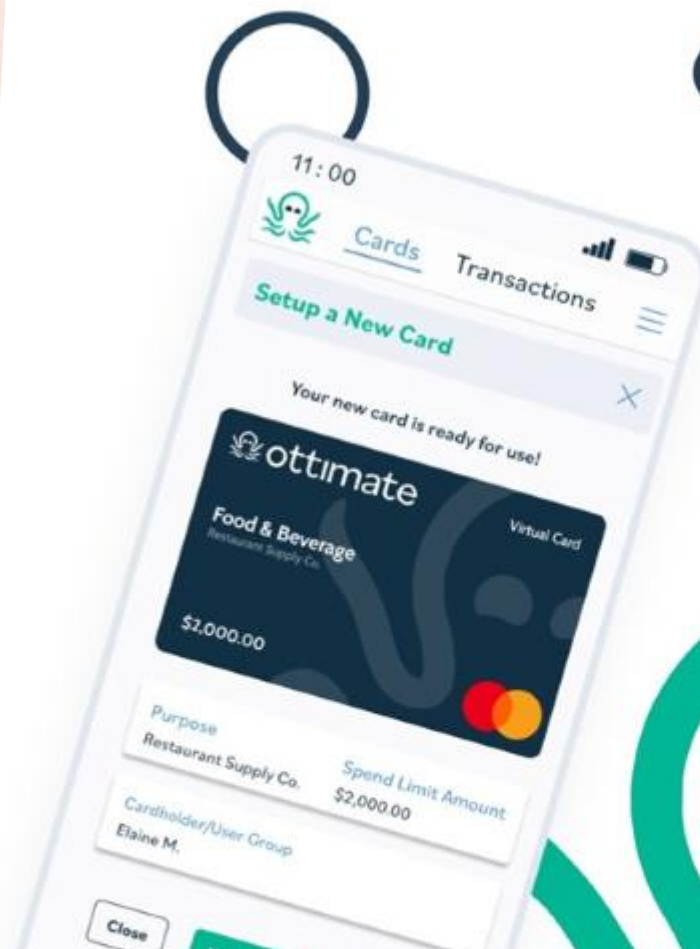
MAJOR RESTAURANT BRANDS ARE INVESTING IN PROPRIETARY AI SYSTEMS

In February 2025, Yum! Brands announced the launch of Byte by Yum!, the company's new AI-powered technology platform, which includes "online and mobile app ordering, point of sale, kitchen and delivery optimization, menu management, inventory and labor management, and team member tools," accessible by all units across the brand's portfolio. Yum! is not the first major restaurant brand to invest heavily in an in-house AI-powered tech suite, nor will they be the last: just last year, Wendy's unveiled its FreshAI platform in partnership with Google, and Starbucks has been leveraging its own DeepBrew AI platform since 2021.



LET AI HANDLE THE PAPERWORK WHILE YOU TAKE CARE OF THE HOSPITALITY

Running a foodservice operation often means handling critical but often tedious tasks like scheduling, accounting, and payroll. Fortunately, AI can help. Pictured left is 7Shifts, an AI-powered workforce management platform that can help you streamline scheduling, track employee hours, manage payroll and tips, ensure labor law compliance, as well as devise strategies for optimal employee engagement. On the right is Ottimate (formerly Plate IQ), which automates accounts payable (AP) processes for hospitality businesses. Using AI and machine learning, Ottimate digitizes invoices, automates data entry, and simplifies expense management, making AP processes more efficient.





Prep Assistant



DI



Station Assistant

AI JOINS THE QUEST FOR A BETTER, MORE EFFICIENT BACK OF HOUSE

Pictured above is PreciTaste, which offers a suite of AI-powered tools to streamline back-of-house operations. Its Prep Assistant service, for example, deconstructs each menu item into components then uses AI to generate data-driven prep forecasts each day, calculating what ingredients need to be prepped, in what quantity, and in how many steps. It then automatically generates daily tasks lists, assigns them to team members at each station, and can also translate these tasks into the team member's preferred language.



FOR SOME OPERATORS, A MORE EFFICIENT BACK-OF-HOUSE REQUIRES ROBOTS

As more operators turn to kitchen automation to streamline back-of-house processes and address labor challenges, innovators are stepping up to the plate. Pictured left is Nala Robotics' Bowls robot, which prepares fully customizable bowls without human intervention. The company has also developed other automation projects, like Wingman (an automated fryer), Pizzaiola (a pizza-making robot), and Spotless (an automated dishwasher). Pictured right, meanwhile, is Botrista's DrinkBot, which was featured at the 2024 NRA Show. In addition to helping operators automate the job of preparing craft beverages, the machine also comes with CloudBar, an AI-powered system that can monitor sales and inventory data to inform operators' beverage strategy.

Most operators are open to being convinced about AI in foodservice, but it's largely a wait-and-see game, even as the novelty is wearing off.

In keeping with prior findings, the strongest motivators behind AI adoption are all practical. Nearly half of decision makers would be willing to experiment with an AI solution if it is affordable and easy to use, or if they can test it out first without making a binding commitment.

	2023	2024	1-year change
If it is affordable to use and fits in my operation's budget	50%	46%	-4%
If it is easy to access and simple to learn how to use	48%	44%	-4%
If I can try it out to see if I'll be satisfied with its capabilities	46%	43%	-2%
If it's created by a company or organization that I recognize and trust	17%	21%	4%
If the company behind it is transparent about how the AI is developed and trained	20%	15%	-5%
If I can't figure out any other way to accomplish a specific task without using AI	17%	15%	-2%
If it is recommended by an industry partner I trust (supplier, manufacturer, DSR, etc.)	14%	14%	0%
If it is recommended by my operation's stakeholders, investors, or parent organization	19%	12%	-7%
If reputable industry leaders (award-winning restaurants, chefs, etc.) start using it	10%	9%	-1%
If my local competitors start using it	9%	8%	-1%
If it becomes viral and highly recommended on social media	4%	5%	1%
If it is recommended by a media source that I trust (news, trade publication, etc.)	4%	4%	0%
Other	1%	1%	0%
None of the above	16%	19%	2%



The New AI Landscape

The background of the slide is a dark, abstract composition. It features a large, glowing, circular shape in the center, resembling a stylized 'D' or a portal. This shape is composed of numerous thin, glowing lines in shades of blue, purple, and yellow. Surrounding this central shape are patterns of binary code (0s and 1s) in a light blue color, which appear to be floating or flowing through the space. The overall effect is a sense of digital depth and complexity.

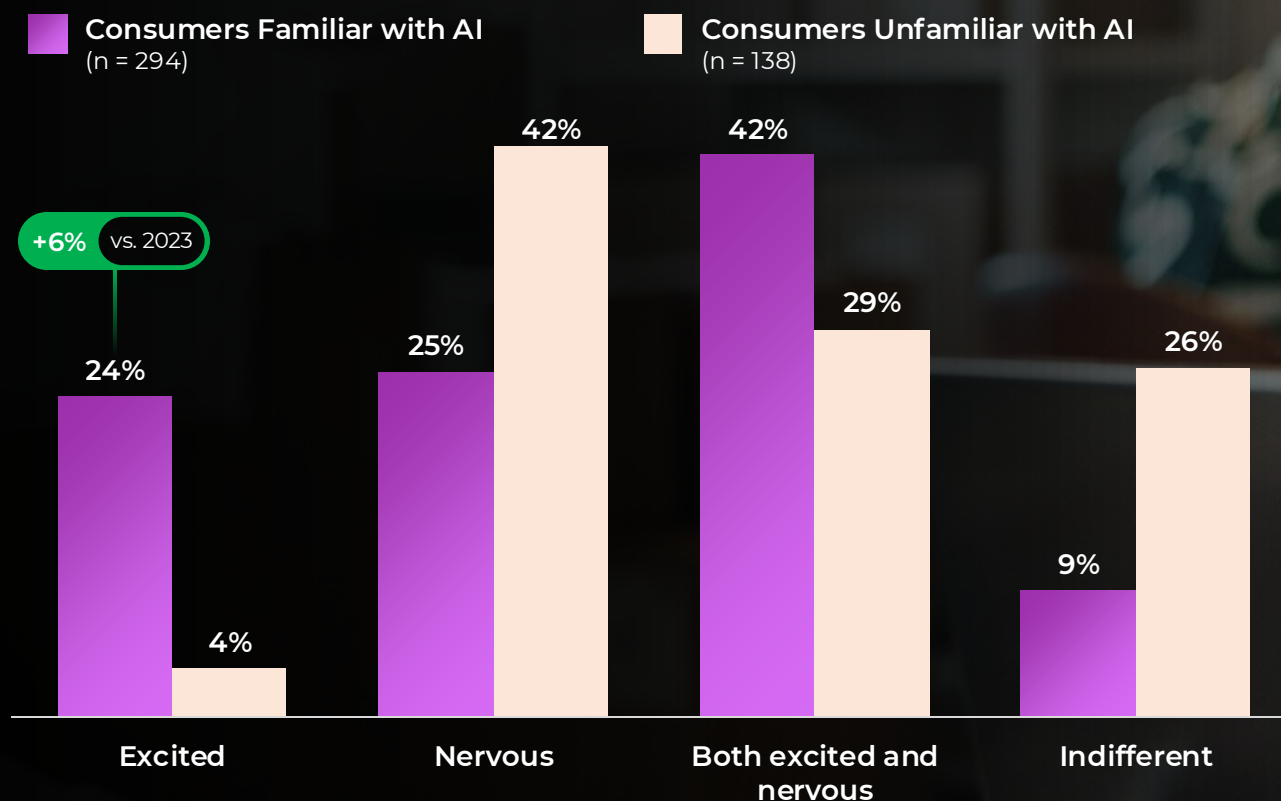
03

CONCERNS &
FUTURE VIEW



Since 2023, consumer excitement for AI's potential has increased, particularly among those familiar with it.

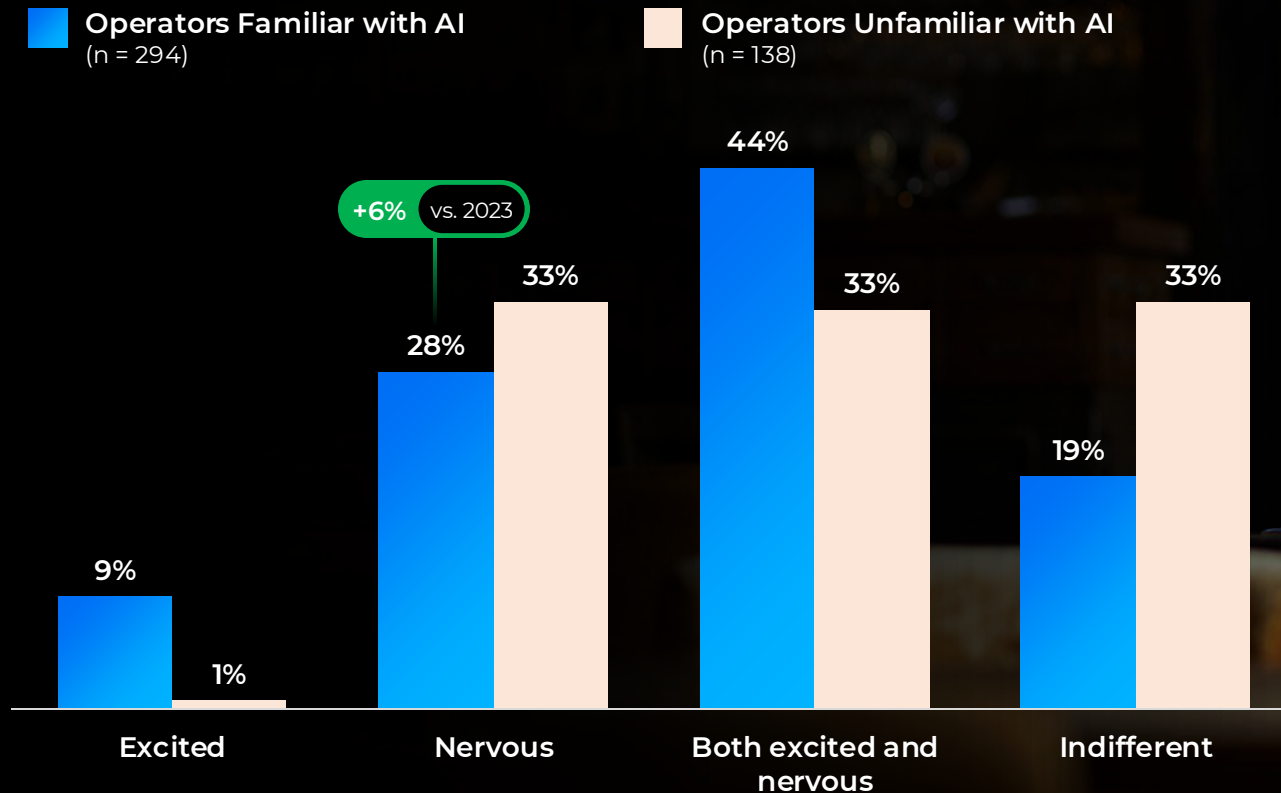
In exchange, slightly fewer consumers say they're nervous about the future of AI in our society compared to 2023. Knowledge and exposure continue to be the key to swinging the pendulum away from AI doom and gloom – the more you know about something, the less likely you are to fear it.



Q: Which of the following emotions best describes how you feel about the future of AI technology in our society at large?

Operators are generally more nervous than excited about the potential of AI, and unlike consumers, that perspective has not changed since 2023.

That said, operators who are more well-versed in the world of AI are less likely to be nervous about its future societal impact, so breaking down this knowledge barrier will be crucial to demystifying this ever-changing piece of technology in operators' minds.



Despite increased exposure to AI, consumers are still just as concerned about its impact on sociopolitical issues (like data privacy, ethics, or the environment) as they were in 2023.

Boomers are significantly more likely than younger consumers to harbor concerns over the sociopolitical impact of AI – likely because they're the generation least experienced with it.

"I'm worried about the **privacy and security** issues related to AI usage and development."

74%

I'm worried about the impact AI may have on **politics and culture** (e.g. spreading fake news, messing up elections, causing more division, etc.)

71%

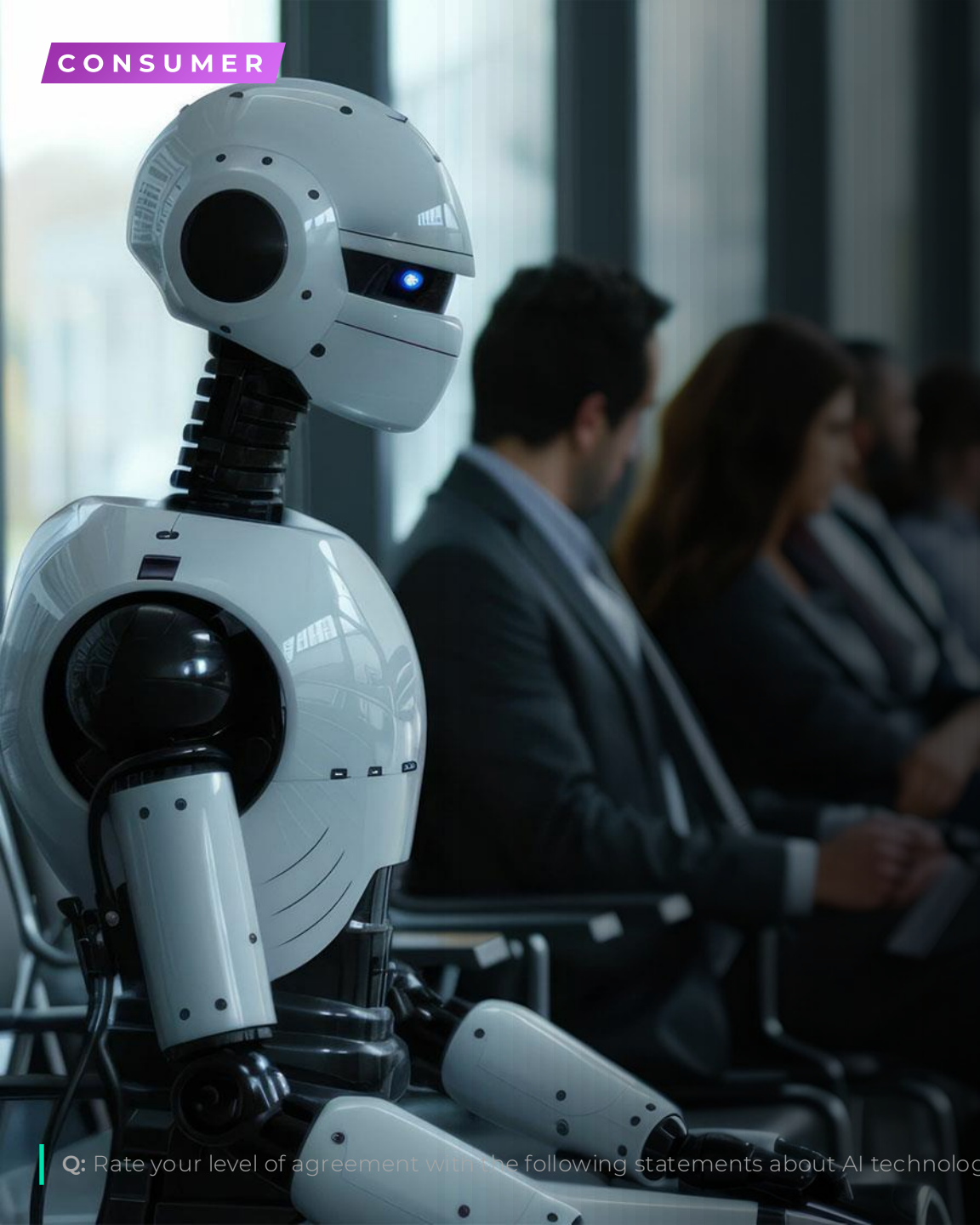
"I'm worried about the **ethical and moral** issues related to AI usage and development."

69%

"I'm worried about the **environmental** issues related to AI usage and development."

52%

Q: Rate your level of agreement with the following statements about AI technology. (top 2; 5 pt. scale)



Over two-thirds of consumers also worry that the proliferation of AI will fundamentally alter the fabric of human life, from our careers to how we connect with and treat one another.

Boomers and Gen X are significantly more likely than younger generations to express concern about the dangers of over-relying on AI.

"I'm worried that AI technology will cause many people to lose their jobs."

67%

"I'm worried that AI technology will permanently destroy jobs or career paths that currently exist."

67%

"I'm worried that relying too much on AI will make humans less creative or free-thinking."

73%

"I'm worried that adding more AI into our lives will make humans less social, caring, or empathetic."

69%

Operators have doubts of their own over the role AI might play in the food industry, particularly around privacy, security, and control.

The concern that over-reliance on data and technology could take away business control is strongest among restaurant operators, especially in casual and fine dining (who might care more about the “craft” of cooking than limited-service counterparts). Nearly 30% of operators also need more information about AI in foodservice (e.g. how models are trained, which models are best, etc.) before they can feel more comfortable investing in it.

	2023	2024	1-year change
Giving AI systems our business data might leave us vulnerable to privacy and security challenges	35%	31%	-4%
Over-relying on data and technology could take away my sense of control of my own business	26%	30%	5%
AI systems are changing so rapidly that what's great today may be outdated tomorrow	28%	26%	-2%
I don't understand how AI systems are developed and how they make decisions, so I'm not inclined to trust them	26%	25%	-1%
AI platforms could be trained on low-quality data, leading to bad recommendations or misinformation	20%	22%	2%
Over time, the most reliable AI systems and tools might become too expensive to afford	22%	21%	-1%
AI systems can perpetuate biases and discrimination , especially if used in staffing and hiring	16%	14%	-2%
There are too many new AI tools and systems, it's too difficult to find the cream of the crop	10%	14%	4%
None of the above	9%	13%	4%



Most importantly, many operators who are AI skeptics are worried this technology will irrevocably disrupt aspects of foodservice that are more “human.”

Two in five operators are afraid the rise of AI and the push for automation could jeopardize the creative aspects of cooking and foodservice. Meanwhile, over 40% of midscale and casual dining operators are resistant to the idea of automating the front of house, worrying that service will be too “robotic.”

“Incorporating AI and automation could lead to a loss of “human touches” and creativity in foodservice.”

-7% vs. 2023 44%

“Incorporating AI and automation could make our customer experience depersonalized and robotic.”

36%

“AI technology could displace human workers and make many foodservice jobs obsolete.”

29%

“AI technology could drastically change job roles and responsibilities, requiring new skills or extra training to work alongside AI systems.”

-7% vs. 2023 24%

Despite their concerns, few operators actually believe AI can one day beat human staff or drastically revolutionize the food industry.

Most operators feel confident that human chefs and servers will always outperform automated systems when it comes to the fundamentals of foodservice. While roughly 40% of midscale and on-site operators predict that AI could drastically transform the food industry in the next decade, nearly half of C&U operators disagree.

“Because of AI, the food industry in the next 5-10 years will be virtually unrecognizable from what it is today.”

38%

“In time, AI systems will be better and more efficient than humans at creating recipes and preparing food.”

24%

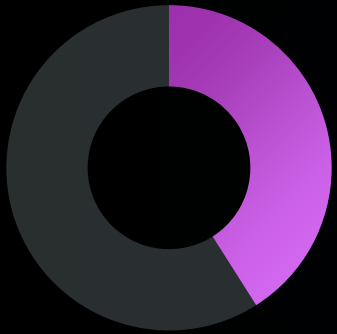
“In time, AI systems will be better and more efficient than humans at customer service.”

24%

Q: Rate your level of agreement with the following statements about AI technology. (top 2; 5 pt. scale)

For most operators, the chances of AI gaining human sentience are slim. But for consumers, those chances are increasing.

Compared to 2023, the proportion of consumers who can envision this possibility has increased by 7%. Men, Gen Z, and Millennials are significantly more likely than their demographic counterparts to share this belief.



41%

+7% vs. 2023

of consumers believe that AI will one day become sentient and gain human consciousness.



23%

of operators believe that AI will one day become sentient and gain human consciousness.

Q: Rate your level of agreement with the following statements about AI technology. (top 2; 5 pt. scale)

Most consumers and operators agree that more transparency and oversight are needed before their trust in AI can improve.

Compared to 2023, while nearly 70% of consumers – especially Boomers – still agree that AI regulations are necessary, the proportion of operators who wish for stricter laws and oversight has decreased by nearly 10%. Currently, the strongest advocates for federal AI regulation are operators working in QSRs, casual dining, and B&I establishments, while fine dining operators are the likeliest to disagree with this sentiment.



67%

of consumers agree there needs to be stricter laws and regulations around AI development.



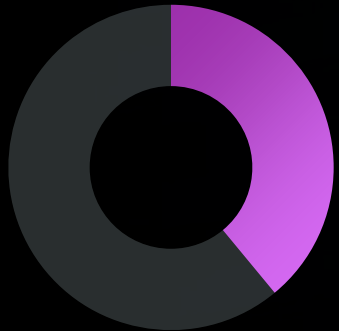
57%

of operators agree there needs to be stricter laws and regulations around AI development & AI use in the food industry.

-9% vs. 2023

Overall, nearly two-fifths of consumers are hopeful that the benefits AI promises can outweigh its issues; operators are less optimistic.

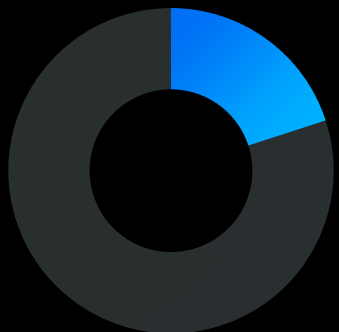
When asked to evaluate whether the potential benefits of AI can justify its risks and harms, nearly half of operators are on the fence. Both consumers and operators who possess some level of AI familiarity are generally more confident that the good of AI outweighs the bad.



39%

+7% vs. 2023

of consumers agree the benefits and potential of AI outweigh its issues.



20%

of operators agree the benefits and potential of AI outweigh its issues.





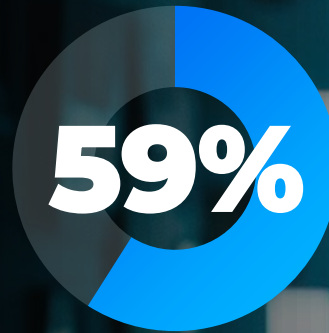
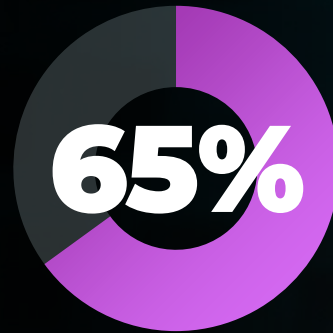
34%

of consumers believe that
our society will only improve
as AI technology improves.

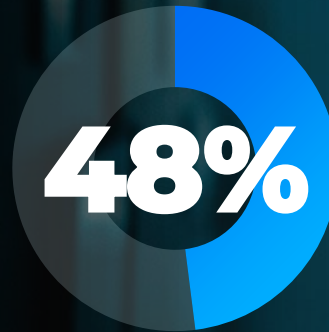
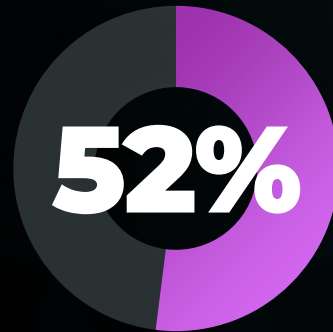
The more AI develops and proliferates the market, the less avoidable it will be – many Americans are already experiencing AI burnout.

Nearly two-thirds of consumers and operators have witnessed AI-related content and products pop up in too many corners of their lives, so much so that they're unable to avoid it even if they wanted to. Roughly half of consumers and operators agree that AI is hyped up too much, especially Boomers (the generation most averse to this technology).

"It feels like AI technology is popping up everywhere I look, and I can't escape or avoid it."



"I feel like AI technology is currently hyped up too much and is overrated."





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