

>> BEHAVIORAL SCIENCE DRIVING GROWTH

ALETHEIA'S VALUES-DRIVEN APPROACH TO MEDIA AND MESSAGING

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ALETHEIA
MARKETING & MEDIA



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THE SLOW DEATH OF BLACK FRIDAY

HOW RETAILERS CAN COMBAT CONSUMER FATIGUE ON RETAIL'S BIG DAY

If you think you've seen holiday décor in July, you aren't hallucinating. The holiday shopping season truly is starting earlier every year.

Amazon's Prime Big Deal Days in October, the company's self-proclaimed kickoff to the holiday shopping season, was the earliest it has ever been. Simultaneously, Target, Walmart, Best Buy, and Kohl's all held exclusive sales events to grab an early share of people's limited holiday budgets. But the question becomes: Will shoppers have any interest, or money, left by the time Black Friday and Cyber Monday roll around? While retailers have adapted to shifting consumer behavior, mounting evidence suggests the answer to that question could very well be a resounding "no."

Zenzi by Aletheia conducted a nationwide survey of 1,290 U.S. adults to explore shopper excitement for these events in 2024 and how retailers can respond to evolving consumer attitudes. Analysis of the results yielded five distinct shopper segments, defined by their enthusiasm (or lack thereof) around Black Friday and Cyber Monday. Segmenting shoppers based on their levels of excitement and attitudes can offer insights to retailers on how to fine-tune their promotion strategies and manage shopper fatigue.

THE FIVE HOLIDAY SHOPPER SEGMENTS

Apathetic (31%)

This segment has little-to-no excitement for Black Friday/Cyber Monday and likely hasn't for some time. 64% feel there is way too much advertising and 44% tend to ignore the ads they see. A whopping 75% go so far as to say Black Friday is a scam designed to make people spend more money. Over 71% feel less urgency to shop on Black Friday or Cyber Monday because good deals are available year-round. Only 4% plan to begin shopping on Black Friday, while 37% won't even start shopping until December. These will be the toughest consumers to re-engage.

Fatigued (12%)

Once excited, this group has now lost interest. 43% find the advertising excessive, annoying or overwhelming, 36% feel stressed or even angry about holiday shopping events, and only 6% say they find these events exciting. In fact, over 79% agree that Black Friday/Cyber Monday has become meaningless due to early sales. Like the Apathetic segment, 78% believe Black Friday is a scam. Nearly half of this segment (49%) said their shopping would begin before the end of October and only 4% plan to begin shopping on Black Friday. This group is dangerously close to becoming Apathetic.



THE SLOW DEATH OF BLACK FRIDAY

Disenchanted (9%)

These folks are somewhat excited, but not nearly as excited as in years past. Ads don't bother them; in fact, 62% find them informative. Of concern, however, is that like the Fatigue segment, 33% feel overwhelmed or stressed about holiday shopping events. Most (57%) will begin their holiday shopping before the end of October and 11% plan to begin on Black Friday. One of the more movable and curious audiences, these consumers may be best reached through actionable and fact-heavy promotions.

Engaged (20%)

These respondents are somewhat excited about Black Friday/Cyber Monday, with no change compared to previous years. Like Disenchanted shoppers, 64% find the ads informative and they're equally likely to describe themselves as feeling excited (29%) or curious (29%) about holiday shopping events. While not Highly Enthusiastic, they still have the potential to engage—with the right incentives. 13% plan to begin shopping on Black Friday while 55% start their holiday shopping before the end of October.

Highly Enthusiastic (28%)

Not only are they excited in anticipation, but 92% of this group find the Black Friday/Cyber Monday shopping experience fun and exciting. This stark difference underscores how enjoyment is a critical factor distinguishing Engaged shoppers from Fatigued ones. 81% find the ads exciting or informative. Nearly 60% of this segment would begin their holiday shopping before the end of October, while only 3% will wait until December. 20% plan to begin on Black Friday.

WHAT DOES THIS MEAN FOR RETAILERS?

By understanding the characteristics and perspectives defining these distinct groups, retailers can more effectively tailor their Black Friday/Cyber Monday promotions and shopping experiences to appeal to different audiences.

Specifically, the results suggest that Fatigued and Disenchanted shoppers—on the verge of disinterest—represent key re-engagement opportunities. These results were further refined using Zenzi by Aletheia's ValuesBase® model, which dimensions consumer targets based on the core motivations most predictive of human behavior: **Achievement, Pleasure, Freedom, Purpose, Tradition, and Security.**

The research showed that Fatigued and Disenchanted shoppers were aligned primarily with the **Freedom** and **Purpose** ValuesTypes. Why is this important? Because knowing which Values these consumers share helps inform strategies for how to engage with them around different aspects of holiday marketing.



THE SLOW DEATH OF BLACK FRIDAY

WAYS TO COMBAT SHOPPER FATIGUE AMONG FREEDOM AND PURPOSE VALUETYPES

Freedom ValuesTypes march to the beat of their own drum, so it's no surprise that they dislike being told when to shop. They want the ease and flexibility of shopping online, where they can easily compare prices, avoid crowds, and enjoy fast shipping,

To effectively market to Freedom ValuesTypes, focus on their desire for independence, creativity, and avoiding the ordinary. Emphasize flexibility and customization, offering online-exclusive deals that allow them to shop on their terms. Appeal to their preference for discovering unique and innovative products, and craft messaging that downplays the high-pressure sales tactics often associated with big holiday events.

Purpose ValuesTypes are driven by a desire to make a difference in the world, and ethical considerations influence where they choose to shop. Unlike their Freedom counterparts, Purpose ValuesTypes prefer shopping in-store, where they can try products and support local businesses.

To effectively market to Purpose ValuesTypes, capitalize on their curiosity by creating meaningful storytelling about your brand's origins, products, sustainability initiatives, and community involvement. Highlight the people behind the brand and the intentionality of your business practices. Help Purpose ValuesTypes discover how your brand aligns with their core beliefs and subtly incorporate social impact and ethical choices into your promotions.

Aletheia may not be able to prevent the holiday shopping season from encroaching on summer barbecues, but we can help retailers use ValuesBase marketing to reignite the spark in their holiday shopping events.

>> BLACK FRIDAY 2024 AND SHOPPER FATIGUE

HOW THE NATION'S BIGGEST RETAILERS STACK UP



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EXECUTIVE SUMMARY

FIVE SEGMENTS TO WATCH

Based on a national, census-balanced survey of 1,290 U.S. adults, we identified five distinct shopper segments which were defined by their excitement levels for shopping on Black Friday and Cyber Monday:

- **Apathetic** Shoppers who have not been at all excited for Black Friday in past years and 2024 is no different.
- **Fatigued** Shoppers who are not at all excited for Black Friday in 2024 but were excited in past years.
- **Disenchanted** Shoppers who are somewhat excited for Black Friday in 2024 but less than in previous years.
- **Engaged** Shoppers who are somewhat excited, but not more or less than previous years.
- **Excited** Shoppers enthusiastically looking forward to Black Friday 2024 and can't wait to shop.

These segments were further refined around their attitudes toward 2024 holiday shopping events, which corresponded to unique behaviors, preferences, and perspectives for each group.

Here we present the results and examine the similarities and differences in where these segments plan to shop on Black Friday and Cyber Monday, and what it might say about the future of these all-important annual retail events.



...there may be a story at the intersection of shopper fatigue and core motivations that can explain why some segments prefer certain stores over others.



SHRINKING OPPORTUNITY

RESULTS SUGGEST RETAILERS SHOULD EXPECT FEWER IN-PERSON STORE VISITS IN 2024

When we looked across the segments at the median number of in-person stores shoppers plan to visit for Black Friday, a clear trend emerged which suggested that the more excited a shopper is, the more stores they plan to visit.

MEDIAN NUMBER OF STORE VISITS PER SEGMENT



For online Cyber Monday shopping, the respondents were aligned across segments with most selecting only one store.

Interestingly, the number of stores shoppers plan to visit did not differ by **Zenzi ValuesType**, indicating that **there may be a story at the intersection of shopper fatigue and core motivations that can explain why some segments prefer certain stores over others.**

ZENZI VALUETYPES EXPLAINED:

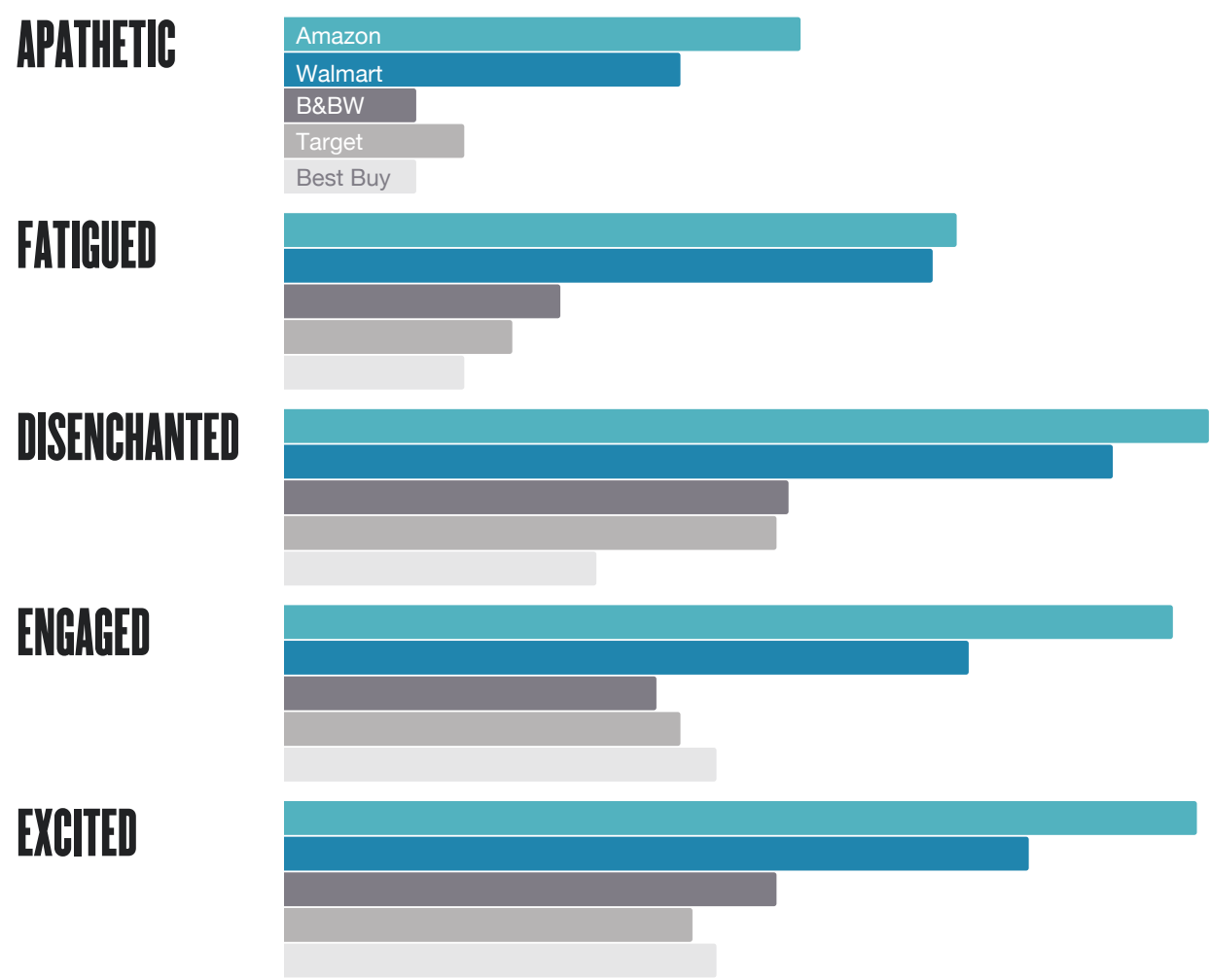
The six Zenzi ValuesTypes identified as the core motivations most predictive of human behavior:

- **Achievement:** Success, recognition, power, status
- **Pleasure:** Maximized immediate enjoyment at minimal cost
- **Freedom:** Independence, creativity, nonconformity, curiosity
- **Purpose:** Selflessness, ethics, generosity, community service
- **Tradition:** Maintaining cultural or religious identity, customs, beliefs
- **Security:** Risk aversion, safety, predictability, familiarity



Across the entire sample, 63% of respondents planned to buy from **Amazon** and 51% planned to shop at **Walmart** during Black Friday and Cyber Monday sales. **Bath and Body Works** (28%) and **Target** (27%) vied for a distant third, followed by **Best Buy** (24%) and **Kohls** (19%).

Parsing the data by the shopper segments reveals a stark contrast based on Black Friday/Cyber Monday excitement level and where different segments plan to shop.



ONE STOP

FATIGUED SHOPPERS ARE LOOKING FOR ONE-STOP SHOPPING EXPERIENCES

Most shoppers in the Fatigued segment will shop at only one store over Black Friday and Cyber Monday, with the majority choosing Amazon and/or Walmart. Fatigued Shoppers who selected other outlets tended to stick with major retail chains like Target and Kohl's, followed by discount stores (e.g., Dollar Tree, Dollar General, Family Dollar) and off-price retailers (e.g., Ross, TJ Maxx, Marshall's).

All of these options meet the main criteria most Fatigued Shoppers are considering when choosing where to shop: offering a broad selection of available products, convenient locations with plenty of parking, and special in-store discounts or promotions.

When ValuesTypes were examined for these retailers:

Purpose Types were more likely to prefer Target, Kohl's, and TJ Maxx.

Tradition Types were more likely to prefer Walmart, Kohl's, and Marshall's.

Freedom Types were more likely to prefer Dollar General, Dollar Tree, and Family Dollar.



FAMILIAR GROUNDS

DISENCHANTED SHOPPERS PRIORITIZE NATIONAL CHAINS

The data clearly shows that Disenchanted Shoppers are more likely than their more enthusiastic counterparts to visit the most popular retail chains. In addition to those mentioned above, the Disenchanted segment had the highest percentage of planned shopping at Macy's, T.J. Maxx, Home Depot, Old Navy, Marshall's, Hobby Lobby, Lowe's, and Michael's.

This finding could indicate that Disenchanted Shoppers are leaning on familiarity, certainty, and habit, gravitating toward retailers they can trust to have the products they need to buy without experiencing unnecessary hassle or breaking the bank at specialty stores.

The factors Disenchanted Shoppers say they'll consider when shopping this holiday season support this hypothesis:

- the availability of products (64%)
- special in-store discounts or promotions (63%)
- convenience of store location (50%)
- crowd levels and wait times (42%)
- the ability to see and try products before purchasing (38%)

Additionally, their above-average likelihood to shop at home-improvement and craft stores also signals that the Disenchanted Shopper may be more inclined than other segments to participate in **creative or DIY projects**, either for handmade gifts, holiday décor, or home improvement.

Finally, although less than 10% of Disenchanted Shoppers intended to buy from local specialty or department stores, this segment had the **highest percentage of people saying that supporting local business** as a main factor in determining where they shop.

Not surprisingly, of the Zenzi ValuesTypes, **Freedom** (known for independence and creativity) and **Purpose** (known for ethics and community service) were most aligned with the Disenchanted Shopper.



EXCITED SHOPPERS ARE MORE LIKELY TO VISIT SPECIALTY STORES

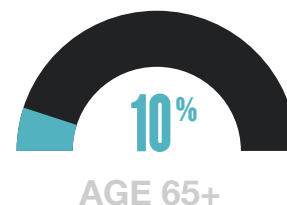
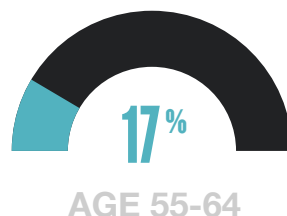
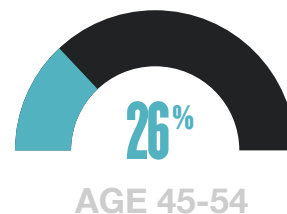
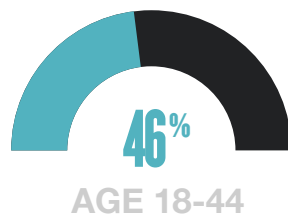
Within the Excited segment, 30 stores received at least 10% of the sample's intent to visit on Black Friday. Several specialty stores that were completely off the radar for other segments, made it into the top 10 for the Excited group:

- Adidas- 33% of this segment plans to shop
- Apple- 27% of this segment plans to shop
- Dick's Sporting Goods- 25% of this segment plans to shop
- Nike- 24% of this segment plans to shop

The appearance of Apple near the top of this list likely relates to the fact that Excited Shoppers are strongly aligned with the **Achievement** ValuesType, which places high importance on material wealth, keeping up with the trends, and signaling success.

The results show that **49% of Achievement Type respondents were in the Excited Shopper** segment.

The predominance of athletic products was not fully explained by ValuesType, and thus could be reflecting the youthfulness of this segment.



Retailers targeting this group can benefit by **promoting exclusivity, trendy items, and dynamic experiences.**



TAKEAWAYS FOR RETAILERS

It's critical for retailers to understand the motivations of shoppers because these insights allow them to create more targeted and effective marketing strategies, especially during key shopping periods like Black Friday and Cyber Monday. Here are a few reasons why this understanding is so important:

- 1 Tailored Messaging Increases Engagement:** Different shopper segments respond to certain types of messaging. By aligning messages with core values, retailers can more effectively capture the attention and interest of each group.
- 2 Optimizing Promotions to your Target:** Understanding shopper motivations helps retailers fine-tune promotions to meet the unique preferences of each segment. For instance, Fatigued shoppers prefer simplicity and convenience, so offering easy, one-stop-shop experiences with minimal hassle is essential. On the other hand, Enthusiastic shoppers enjoy excitement and variety, so exclusive, in-store events or limited-time offers can energize them.
- 3 Combatting Shopper Fatigue:** With many consumers experiencing fatigue around traditional shopping events, addressing specific pain points—like offering more flexibility for Freedom-driven shoppers or reducing high-pressure sales tactics for Apathetic consumers—retailers can reduce the risk of losing customers to early holiday sales.
- 4 Enhancing Customer Loyalty:** When retailers align their messaging with shoppers' values, they don't just drive immediate sales—they build long-term loyalty. Shoppers who feel understood and catered to are more likely to return, refer others, and become brand advocates.
- 5 Maximizing ROI on Marketing Efforts:** Blanket messaging no longer works in today's fragmented marketplace. Targeted, values-based marketing ensures that retailers are not wasting resources on campaigns that don't resonate. By understanding what motivates different shopper segments, retailers can focus their budget on strategies that directly impact their audience, leading to higher conversion rates and better overall ROI.

Incorporating a deep understanding of shopper motivations allows retailers to create meaningful, personalized shopping experiences that cut through the noise of competing sales events and stand out in an increasingly crowded marketplace.



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» WHAT MOTIVATES YOUR SHOPPERS?

LET'S CONNECT ABOUT A VALUES STUDY TO
IMPROVE YOUR TARGETING

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THE CURRENT STATE OF DINING OUT

How consumer values can give restaurant marketers an edge in an era of rising costs

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FEATURED ON [QSRMAGAZINE.COM](https://www.qsrmagazine.com)



THE CURRENT STATE OF DINING OUT

HOW CONSUMER VALUES CAN GIVE RESTAURANT MARKETERS AN EDGE IN AN ERA OF RISING COSTS

As U.S. consumers navigate rising costs, many have been forced to adjust their discretionary spending, resulting in marked shifts in dining habits. According to a [recent study by Givex](#), 41% of Americans report eating out less frequently, 45% have reduced their food delivery orders, and 60% are cooking more at home compared to last year.

Given that the Consumer Price Index for food away from home has [risen 20% since August 2021](#), it's clear that restaurants are now competing for an increasingly smaller slice of the pie. In such a challenging environment, efficient marketing is critically important for restaurant survival. With razor-thin margins, there's little room for error and no appetite for overtly risky campaigns.

To maximize marketing dollars while avoiding ad misalignment and media wastage, restaurant marketing teams must become more strategic, data-driven, and in tune with the motivations of their customers. Specifically, marketers who understand and appeal to the distinct values that drive consumer dining habits will be more likely to rise above the din and capture the audiences they aim to attract.

Zenzi by Aletheia recently conducted a nationwide survey to determine behavioral segmentation of Americans' dining-out habits and preferences, separating the results by the six Zenzi ValuesTypes identified as the core motivations most predictive of human behavior: **Achievement, Pleasure, Freedom, Purpose, Tradition, and Security.**

While consumers face financial pressures and many are dining out less frequently, most agree on the importance of some common food experiences, such as quality, convenience, and social connection.

Across the sample, regardless of ValuesType, the research produced some unsurprising results:

- **Quality, price, and location** are the top factors when choosing a restaurant.
- **Socializing with friends and family, quality of food, and ambiance** or atmosphere are the top reasons for dining in at a restaurant.
- **Convenience and timesaving** are the primary reasons for ordering food online for delivery.
- **Discounts off the total bill** are the most likely promotional messages to entice respondents to visit a restaurant.



THE CURRENT STATE OF DINING OUT

However, when participants' Zenzi ValueTypes were considered, some interesting patterns emerged, signaling the presence of strategic and targeted marketing opportunities. Below is a small sample from the full set of research insights.

HIGHLIGHTING KEY ZENZI VALUES IN DINING PREFERENCES

Achievement:

- Dining Habits: Achievement Types are more likely to dine out frequently, with 41% dining in and 29% using takeout or delivery services at least once a week. They value brand recognition, speedy service, quality and efficiency, often preferring restaurants that offer rewards for loyalty.
- Marketing Strategy: Achievement Types are more likely to respond to campaigns that emphasize exclusivity, premium quality, and status rewards programs. Highlighting the restaurant's ability to deliver consistently excellent and timely service and food will resonate with this group.

Purpose:

- Dining Habits: Purpose Types, motivated by a desire to contribute to the betterment of people and the world, are less frequent patrons of QSRs, with only 24% dining in and 11% using takeout or delivery services weekly. They prefer establishments that are authentic and intentional, and that care about their workers, local communities, and the environment.
- Marketing Strategy: Focus on messaging that highlight the restaurant's commitment to sustainability, community involvement, and healthy, ethically sourced options. Purpose-driven messaging will attract these consumers.

Tradition:

- Dining Habits: Tradition Types place less importance on modern conveniences such as food-delivery platforms and social media presence. Instead, they prioritize consistency and familiarity in their dining experiences. Restaurant ambiance is important to Achievement Types, as is food presentation and service quality.
- Marketing Strategy: Emphasize the restaurant's origin story, recipes, and warm, friendly staff. Campaigns that underscore a sense of nostalgia and belongingness will speak deeply to Tradition Types.

Pleasure:

- Dining Habits: Pleasure Types want dine-out experiences that will provide quick, inexpensive (yet still tasty) food, because their main motivation to go out is having fun and socializing with friends. Pleasure Types love a good deal or promo, but hate delayed gratification (i.e., long lines or wait times).
- Marketing Strategy: Create campaigns that showcase the overall enjoyable experience your restaurant offers. Highlighting indulgent menu items and a vibrant dining atmosphere will attract this group.



THE CURRENT STATE OF DINING OUT

SEGMENTED DATA EXAMPLES:

- **Loyalty/Rewards Programs:** Anything that conveys status or being in the “in group” is going to attract Achievement Types. In fact, the lack of a loyalty/rewards program was a turn-off for a significant number of Achievement Types. In contrast, Pleasure, Purpose, and Tradition Types did not rate loyalty/rewards programs as important determinants of restaurant choice.
- **Social Media Impact:** While most consumers don’t place much weight on a restaurant’s social media presence, those who do are typically Achievement Types (25% find it very/extremely important). Crafting social media posts that appeal specifically to this group could enhance engagement.
- **Dietary Preferences:** The availability of vegetarian or vegan dishes is more important to Purpose Types (36%) than to Pleasure Types (14%). Restaurants that cater to Purpose Types should highlight these options, while those targeting Pleasure Types should highlight the fun.

Understanding and leveraging values in consumer behavior and marketing strategy allows restaurants to create more precise and impactful campaigns. In an industry where consumer preferences are constantly evolving, values-based research and insights can provide critical intelligence to drive effective messaging.



THE KEY TO RESTAURANT MARKETING SUCCESS IN A DOWNTURN: VALUES

PLURALYTICS AI ANALYSIS OF MESSAGING
FOR 8 RESTAURANT CHAINS.



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POWER IN VALUES.

Patented AI works with any Large
Language Model (LLM).

Millions of words, hundreds of brands
analyzed to find language performance
patterns.

Improves content performance
up to 30%.

Deepens engagement with any
demographic or psychographic
audience target.

Billions of Impressions evaluated



PLURALYTICS VALUESFINDER™

What can AI analysis of messaging on the About Pages of
8 well-known restaurant brands uncover?

- The values-driven audience targets each brand
is likely to appeal to based on word and phrase choice.
- The language patterns and differences between
the brands' tones of voice and other stylistic
elements, including complexity, formality and sentiment.
- The signals in their imagery used on key pages to
deepen the connection with audiences.

COPY & IMAGERY

The copy and imagery we evaluated came from the About Pages of 8 well-known restaurant brands:

Starbucks

<https://www.starbucks.com/about-us/>

MOD Pizza

<https://modpizza.com/we-are-mod/>

Chuck-E-Cheese

<https://www.chuckecheese.com/about/>

Chipotle

<https://www.chipotle.com/values>

Main Event

<https://www.mainevent.com/our-story/>

Dave & Busters

<https://www.daveandbusters.com/us/en/about/history>

Tropical Smoothie Cafe

<https://www.tropicalsmoothiecafe.com/our-story/>

Emmy Squared Pizza

<https://www.emmysquaredpizza.com/about/>

The copy was relatively brief, averaging 320 words per brand, and we focused on About Pages as being representative of the brand voice and positioning. The shortest copy was on Emmy Squared Pizza at 184 words and the longest was on Starbucks at 565 words.

For imagery evaluation, the lead image was selected. We uncovered what we call “values signaling for appeal” to 5 large potential values audience targets and 5 tone of voice categories that are highly predictive in brand voice.

We also looked at — on a per sentence and full document level — lexical measures such as complexity, formality, and sentiment as a means to understand the relatability of the content.

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MESSAGING PATTERNS AND VALUES

FOCUS YOUR VALUES VISION.

Across all the brands' About Pages, we see values signaling to a broad audience target with a leaning to words and phrases more likely to connect with people who value tradition. Chipotle, Main Event, and Tropical Smoothie Café scored the highest for the language with "Tradition" appeal. Tropical Smoothie scored the highest for affinity with this group and used the word "inspire" 5 times on its about page, along with "inspiration" and "inspiring," telling their audience: "Inspiring better means better values." But not all brands' language is likely to connect with the tradition group. Chuck-e-Cheese, for example, scored high for language affinity with a target audience that values pleasure, telling its customers to expect "the best family entertainment with arcade games and pizza."



» CONTENT PATTERNS AND TONE OF VOICE

WATCH YOUR TONE.

We analyzed all of copy for the presence of 5 tone of voice families commonly used in brand language: Bold, Warm, Lively, Encouraging, and Informative (neutral). Outside of Informative (35%), Warm was the most prevalent tone in the copy, averaging 22% across all of the brands. Bold was second at 19%, followed by Lively at 18% with very little Encouraging language at 4%. Starbucks was the “warmest” brand in the group with 35% of the copy on it’s About page signaling as Warm, including: “We like to say that we are not in the coffee business serving people, but in the people business

serving coffee. Our employees — who we call partners — are at the heart of the Starbucks experience. We are committed to making our partners proud and investing in their health, well-being and success and to creating a culture of belonging where everyone is welcome.”

The brand with the highest percentage of a single tone was Chipotle, which recorded 55% Bold signal in its copy, including short and direct phrases, like: “Real ingredients. Real purpose. Real flavor.”



We like to say that we are not in the coffee business serving people, but in the people business serving coffee. Our employees – who we call partners – are at the heart of the Starbucks experience. We are committed to making our partners proud and investing in their health, well-being and success and to creating a culture of belonging where everyone is welcome.



INGREDIENTS FOR RELATABILITY

PROJECT YOUR PERSONALITY.

It's not surprising in the restaurant space, particularly in the QSR and fast casual sectors, to see lower scores for language Complexity and Formality. This group of brands averaged an 8 out of 20 for Complexity and a 7 out of 10 for Formality. The one outlier in the group was Emmy Squared Pizza, which scored a 16 for Complexity and a 10 for Formality, using longer sentences with multiple clauses and longer words on its About page, including: "In every neighborhood we join, our team is committed to contributing to the community and practicing our company ethos of inclusivity and unparalleled hospitality."

All eight brands exhibited highly positive Sentiment.

IMAGERY

Our patented AI analyzed one hero image from each page to determine likely values signaling. In most cases—Starbucks, Mod Pizza, Chuck E. Cheese, Chipotle—the values signals in the images matched the language on the page. For example, MOD Pizza's content delivered clear values signals for consistency, quality and for wholesomeness in both the image and the copy on its About page. Dave & Buster's, however, delivered copy that was different from what our AI uncovered in its image signaling, with the copy leaning toward "enjoyment seeking" and the image signaling more for consumers who value "friends and community."



STARBUCKS



OUR COMPANY

OUR HERITAGE

Our story begins in 1971 along the cobblestone streets of Seattle's historic Pike Place Market. It was here where Starbucks opened its first store, offering fresh-roasted coffee beans, tea and spices from around the world for our customers to take home. Our name was inspired by the classic tale, *Moby-Dick*, evoking the seafaring tradition of the early coffee traders.

Ten years later, a young New Yorker named Howard Schultz would walk through these doors and become captivated with Starbucks coffee from his first sip. After joining the company in 1982, a different cobblestone road would lead him to another discovery. It was on a trip to Milan in 1983 that Howard first experienced Italy's coffeehouses, and he returned to Seattle inspired to bring the warmth and artistry of its coffee culture to Starbucks. By 1987, we swapped our brown aprons for green ones and embarked on our next chapter as a coffeehouse.

Starbucks would soon expand to Chicago and Vancouver, Canada, and then on to California, Washington, D.C., and New York. By 1996, we would cross the Pacific to open our first store in Japan, followed by Europe in 1998 and China in 1999. Over the next two decades, we would grow to welcome millions of customers each week and become a part of the fabric of tens of thousands of neighborhoods all around the world. In everything we do, we are always dedicated to our mission: With every cup, with every conversation, with every community, we nurture the limitless possibilities of human connection.

COFFEE & CRAFT

It takes many hands to craft the perfect cup of coffee—from the farmers who tend to the red-ripe coffee cherries, to the master roasters who coax the best from every bean, and to the barista who serves it with care. We are committed to the highest standards of quality and service, embracing our heritage while innovating to create new experiences to savor.

STARBUCKS

CONTINUED



AI ANALYSIS

IMAGERY + COPY

- ▶ Image and copy matched with an emphasis on ideas of “crafted,” “consistent” or “reliable” coffee and “simple pleasures” as part one’s routine.
- ▶ Language choices such as talking about “heritage” and “takes many hands to craft the perfect cup of coffee” and “serves it with care” are great examples. Starbucks also had the highest signal for “expressiveness” appeal of all the text analyzed.
- ▶ The image illustrates the care and consistency and crafting of the coffee experience by showing a barrista named Dave crafting three coffee drinks in identical, stylized cups, with his specialty pouring/coffee pot and each cup in a designated spot.

tone PRESENCE

32%

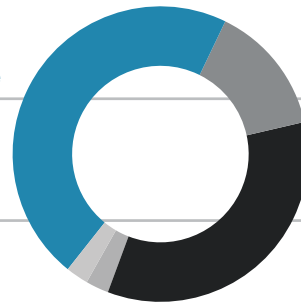
Informative

3%

Lively

3%

Encouraging



21%

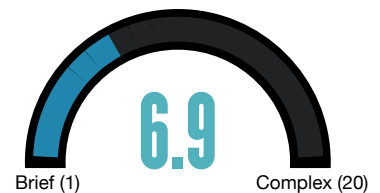
Bold

32%

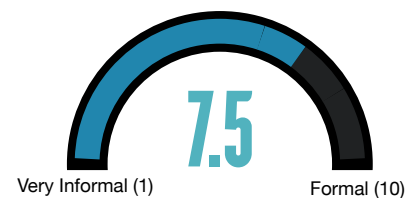
Warm

Flesch Reading Ease: 48.6
Flesch Kincaid Grade: 9.2

COMPLEXITY



FORMALITY



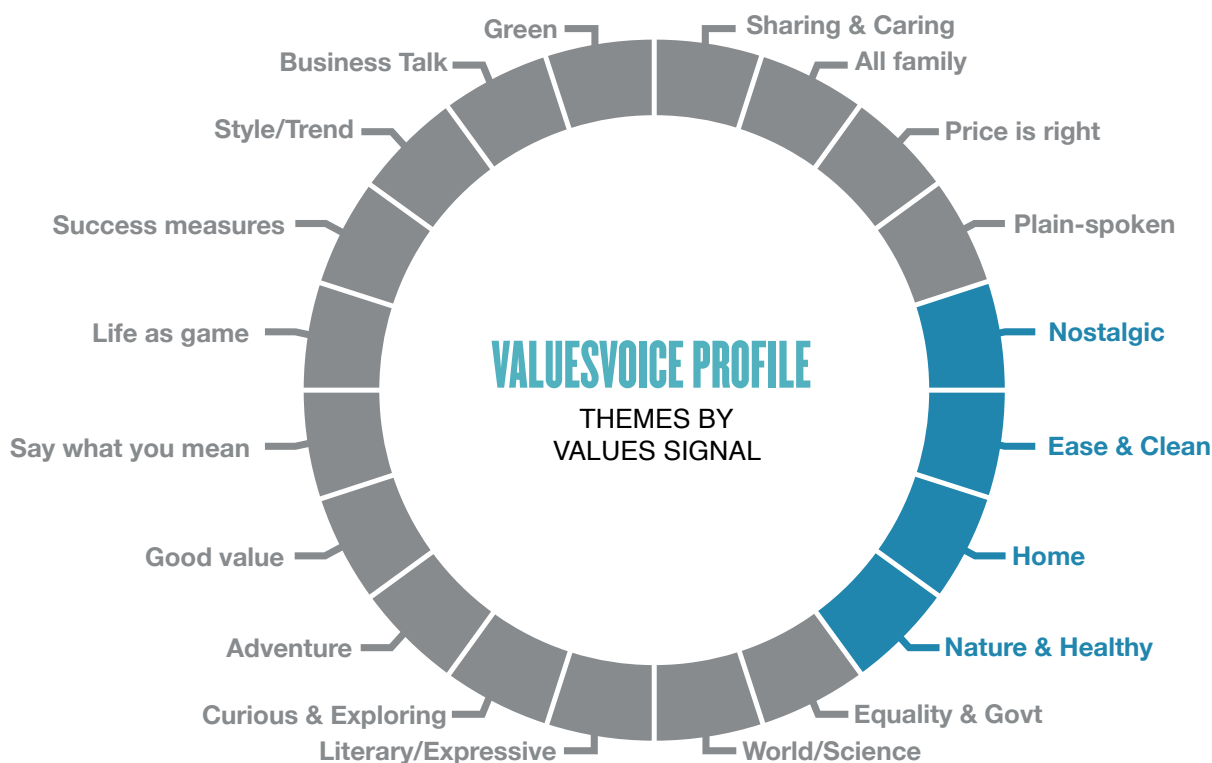
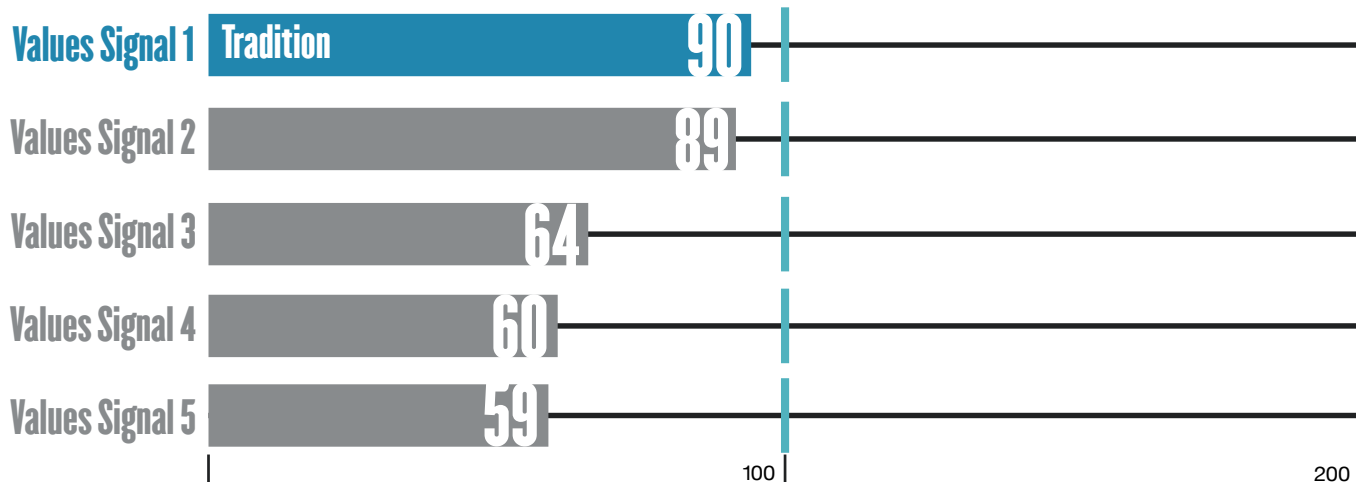
SENTIMENT



STARBUCKS

CONTINUED

VALUES VOICE INDEX





MOD PIZZA

»» OUR STORY

These are stories from the journey—and we're just getting started.

OUR BEGINNING

WELCOME TO MOD

When Scott and Ally Svenson founded MOD Pizza in 2008, they knew the last thing the world needed was another pizza place. In their hometown of Seattle, they imagined a new way for people to enjoy pizza, by bringing speed, individual style and value to one of America's favorite foods. But the real secret sauce wouldn't be the product; it would be the people who serve our communities—the MOD Squad. By taking care of employees, they would take care of the customers, and the business would take care of itself. It's how we've built a culture of opportunity, belonging and community for the past 13 years, and it's catching on wholeheartedly.

OUR PURPOSE

WHY WE EXIST

MOD exists to serve people, in order to contribute to a world that works for and includes everyone. We believe companies can and should be a force for good in the lives of the people they employ and the communities they serve, and we're committed to being the leading employer for individuals facing barriers. Through Opportunity, Mobility, Stability, and Advocacy, we're building strong and vibrant MOD Squads across the country. Learn more about how we're making a positive social impact.

OUR FOOD

FOOD TO FEEL GOOD ABOUT

We're all about choice. The MOD experience is built around high-quality, personalized products delivered superfast. Our individually sized pizzas and hand-tossed salads are fully customizable, with more than 40 toppings, 8 finishing sauces, and 8 delectable dressings. Every pizza or salad is made on demand and completely unique, but the price always stays the same. We care deeply about sourcing superior, fresh ingredients with vibrant flavors, and remain committed to working with our partners on environmental impact, animal ethics, and fair labor practices.

MOD PIZZA

CONTINUED

OUR IMPACT

A CULTURE OF SERVICE

We believe in using our platform to support the causes our MOD Squad cares about in their local communities. Our fundraising program connects local nonprofits, youth sports, and school groups with opportunities to raise money in the neighborhoods where we serve. In addition, we've supported a range of community-based causes throughout the years, such as mental health awareness and suicide prevention, childhood hunger, LGBTQ+ inclusivity, support for individuals with intellectual and developmental disabilities, and justice-involved individuals. All of this work is an important part of what we call "Spreading MODness"—doing the right thing to inspire others, creating ripples that become waves to change the world.

IMAGE SIGNALING

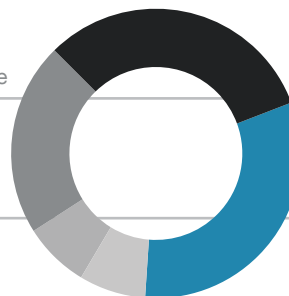
Image and copy match with a clear signal for "simple," "satisfying" and "caring" including language like "stability," "fresh ingredients," "high-quality," "wholeheartedly." Imagery aligns directly with these signals with hands passing a piece of "customized" pizza to each other with cold drinks and complementary sides present.

tone PRESENCE

21%
Informative

7%
Encouraging

7%
Informative

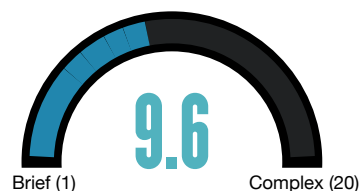


32%
Bold

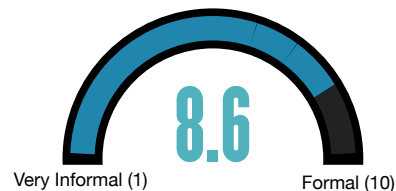
32%
Warm

Flesch Reading Ease: 38.2
Flesch Kincaid Grade: 11.6

COMPLEXITY



FORMALITY



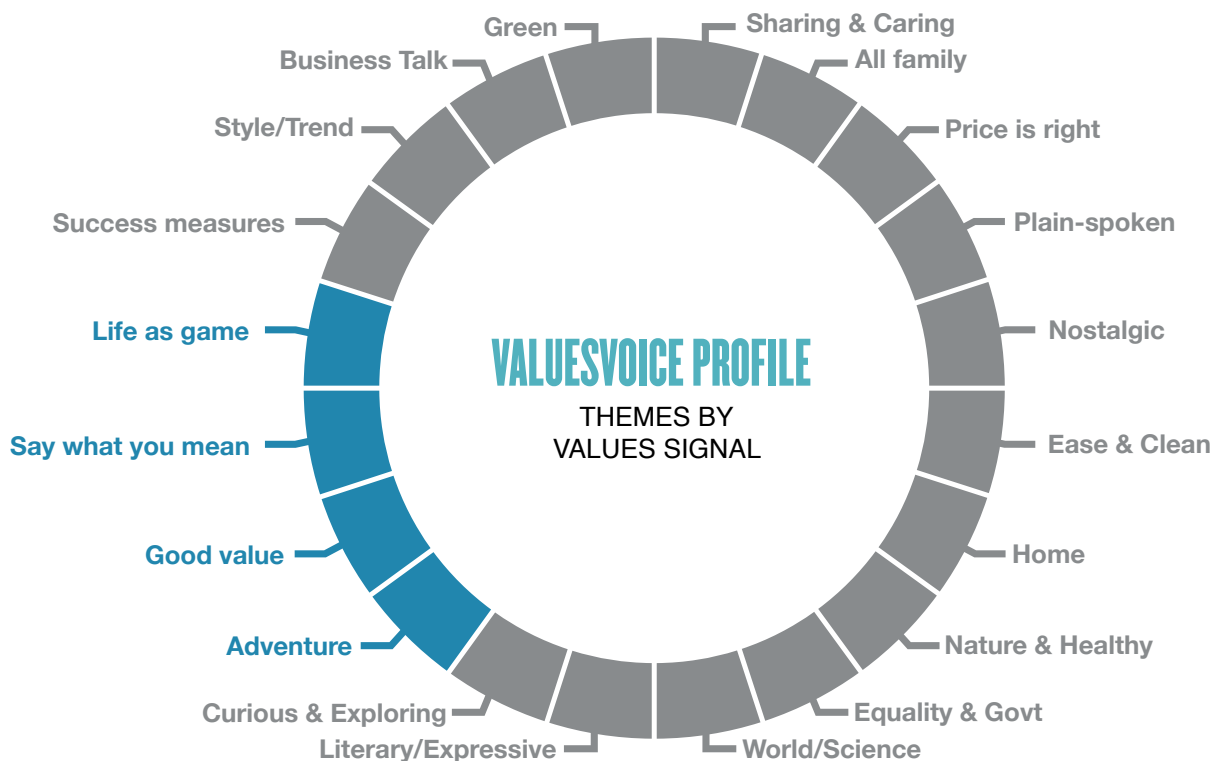
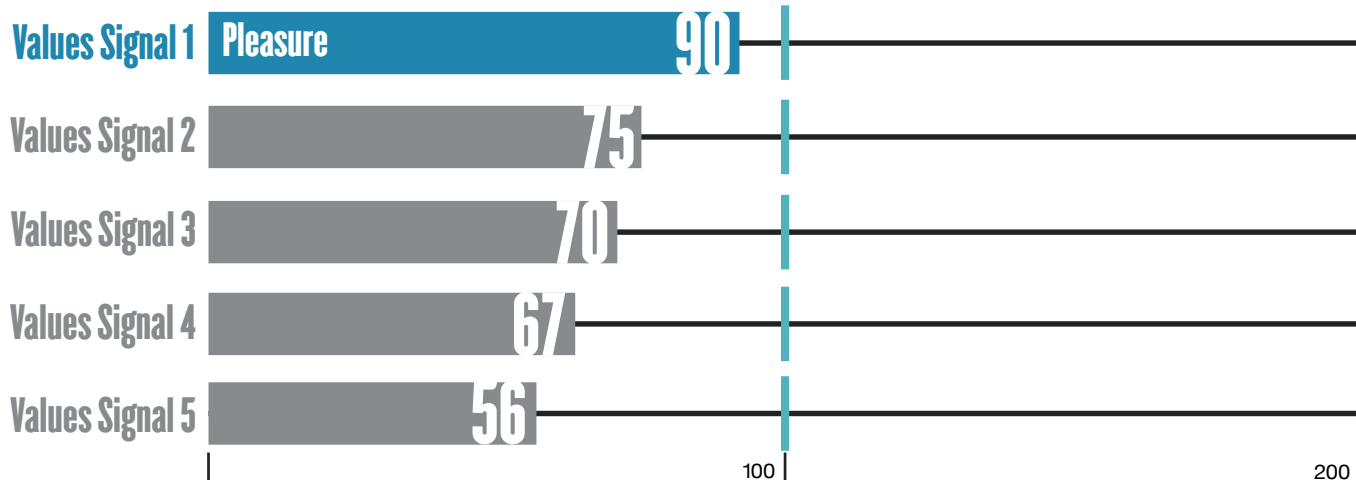
SENTIMENT



MOD PIZZA

CONTINUED

VALUES VOICE INDEX





CHUCK E. CHEESE

»» ABOUT US

Chuck E. Cheese is the place Where A Kid Can Be A Kid®, hosting half a million kids birthday parties every year, and where positive, lifelong memories for families are made through arcade games, pizza, and family-friendly entertainment.

HOW WE STARTED

Chuck E. Cheese began in the late '70s as a groundbreaking and innovative concept bringing pizza, games and entertainment all under one roof. Founded by Nolan Bushnell—the co-founder of Atari— and first known as “Chuck E. Cheese Pizza Time Theatre”, we were the first interactive entertainment restaurant for families. While our name has changed to Chuck E. Cheese and our experience looks a bit different, we still provide the best family entertainment with arcade games and pizza to this day.

ARCADE GAMES

With over two billion game plays per year, Chuck E. Cheese offers the most popular arcade, sports and kid-focused games with varying skill levels for multiplayer games and players of all ages. With All You Can Play, gameplay is both affordable and easy.

FAMILY ENTERTAINMENT

Chuck E. Cheese and friends are among the most recognized and cherished characters in the U.S., with their evolution from animatronics in each store to curating kid-friendly entertainment on multiple channels.

PIZZA RESTAURANT

Using fresh dough and ingredients, Chuck E. Cheese pizza includes a family restaurant environment with delicious pizza. We are the largest pizza place with arcade games in the world!

BIRTHDAY CELEBRATION

We are the birthday capital of the universe celebrating kids birthday parties for over 45 years.

CHUCK E. CHEESE

CONTINUED



AI ANALYSIS

IMAGERY + COPY

- ▶ Image and copy are complementary. The language reinforces the values of bringing people together—especially kids and families—for fun, enjoyment and celebrations with a lively tone.
- ▶ The importance of playing games and eating together with facts like “hosting a half a million kids parties” reinforce entertainment along with the background showing softened imagery of the gaming available.
- ▶ The imagery also delivers a strong signal for family featuring a mom with her child, reinforcing values of safety and that Chuck E. Cheese is a safe place to bring your kids to have fun.

tone PRESENCE

12%
Warm

6%
Other

6%
Bold

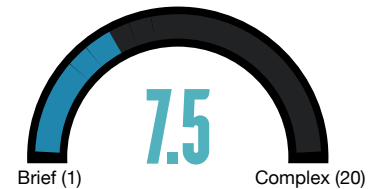


25%
Lively

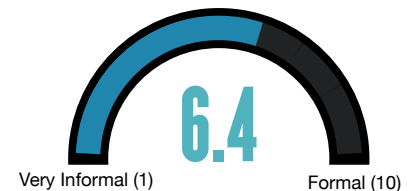
50%
Informative

Flesch Reading Ease: 37.8
Flesch Kincaid Grade: 10.4

COMPLEXITY



FORMALITY



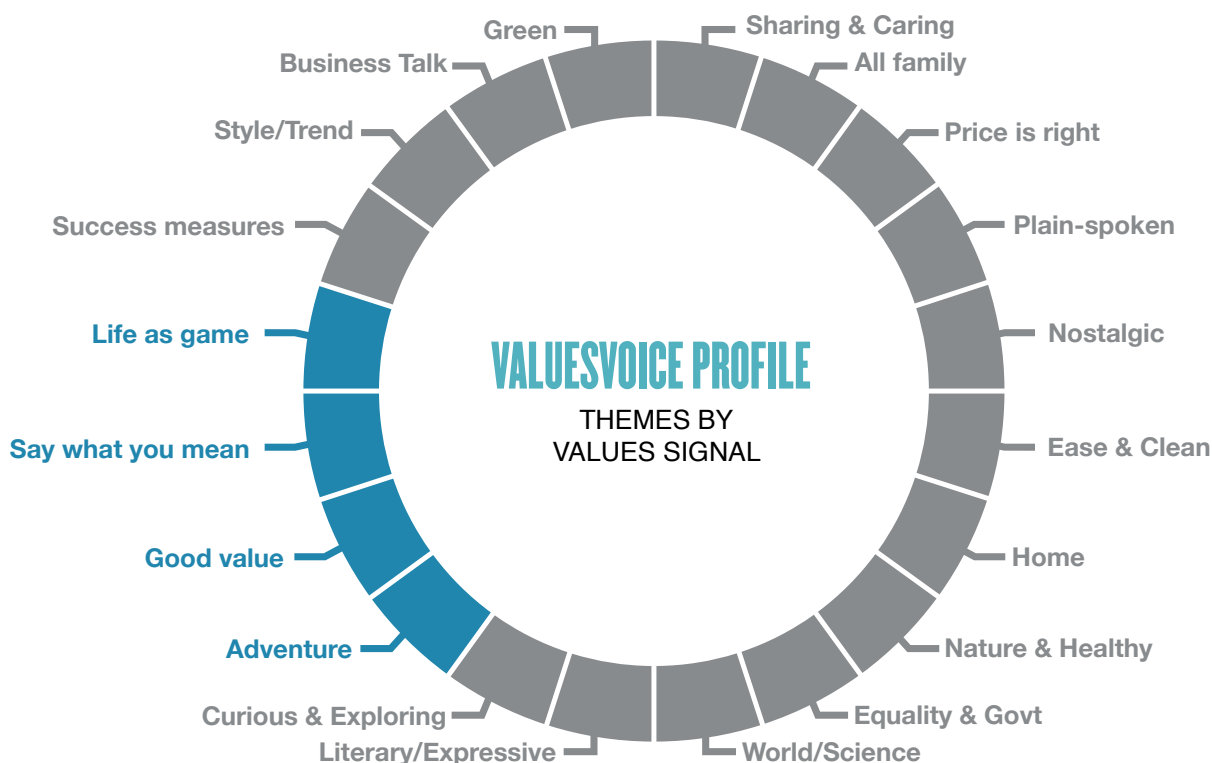
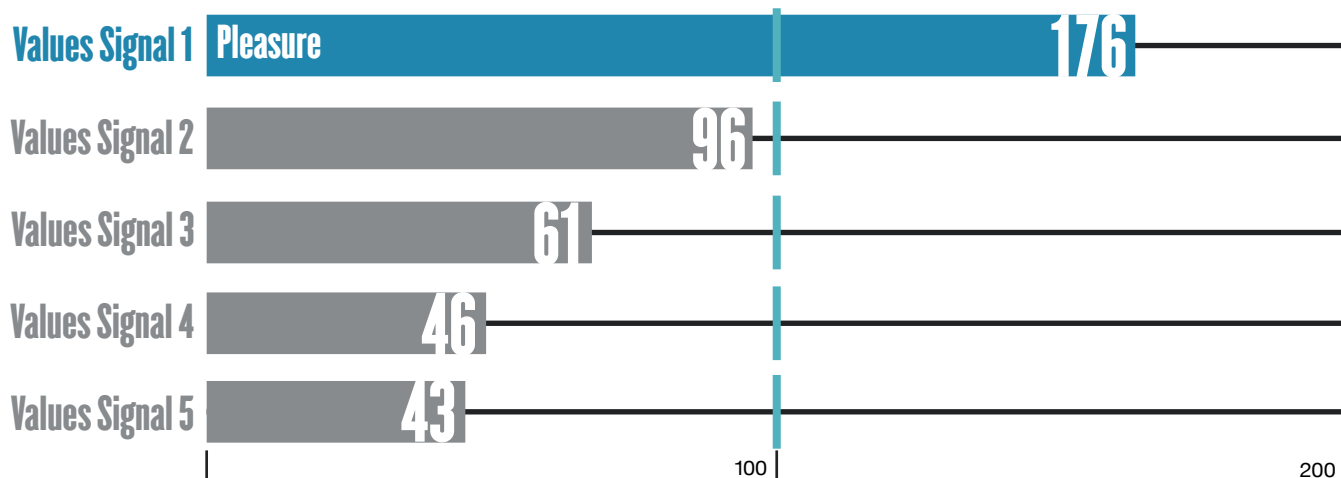
SENTIMENT



CHUCK-E-CHEESE

CONTINUED

VALUES VOICE INDEX





WE BELIEVE THAT FOOD HAS THE POWER TO CHANGE THE WORLD.

We do it by being real

Chipotle was born of the radical belief that there is a connection between how food is raised and prepared, and how it tastes. Real is better. Better for You, Better for People, Better for Our Planet. It may be the hard way to do things, but it's the right way.

This isn't just food for thought. It's thought for food.

BEING REAL MEANS...

Making food fresh every day.

NO Artificial flavors, colors, or preservatives.

NO Freezers, can openers, or shortcuts.

Being real means.... We only use 53 ingredients you can pronounce.

And the only ingredient that is hard to pronounce at Chipotle is "Chipotle."

(It's Chih-poat-lay, by the way)

Being real means.... Being committed

One of the first national restaurant brands to commit to goals on local and organic produce.

First national restaurant brand to commit to using only responsibly raised meat with some of the highest animal welfare standards.

No added hormones ever.

Being real means... Fighting for our planet.

We diverted 50% of our waste from landfills in 2021.

We are committed to reducing our greenhouse gas emissions 50% by 2030

Being real means... Treating our people right.

Supporting people who live our values with real culinary training, career opportunities and great benefits.

It's our way to cultivate a better world.

One meal might not change the world, but the way we make it might.

Real ingredients.

Real purpose.

Real flavor.

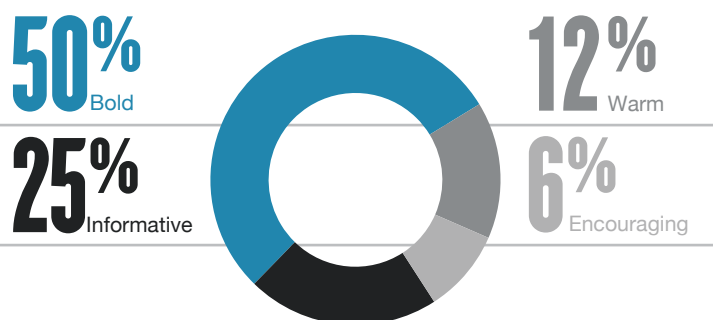


AI ANALYSIS

IMAGERY + COPY

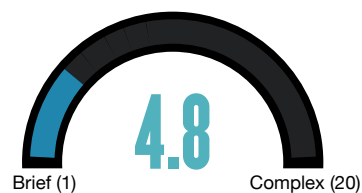
- ▶ Image and copy align with an emphasis on “quality,” “wholesome,” “fresh” and “uncomplicated” food.
- ▶ The theme of “Real” is emphasized and aligns with a plain-spoken style and the straightforward imagery of a Chipotle burrito bowl with simple, natural ingredients.

TONE PRESENCE

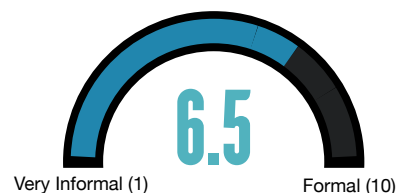


Flesch Reading Ease: 57.3
Flesch Kincaid Grade: 9.9

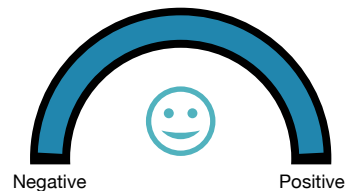
COMPLEXITY



FORMALITY

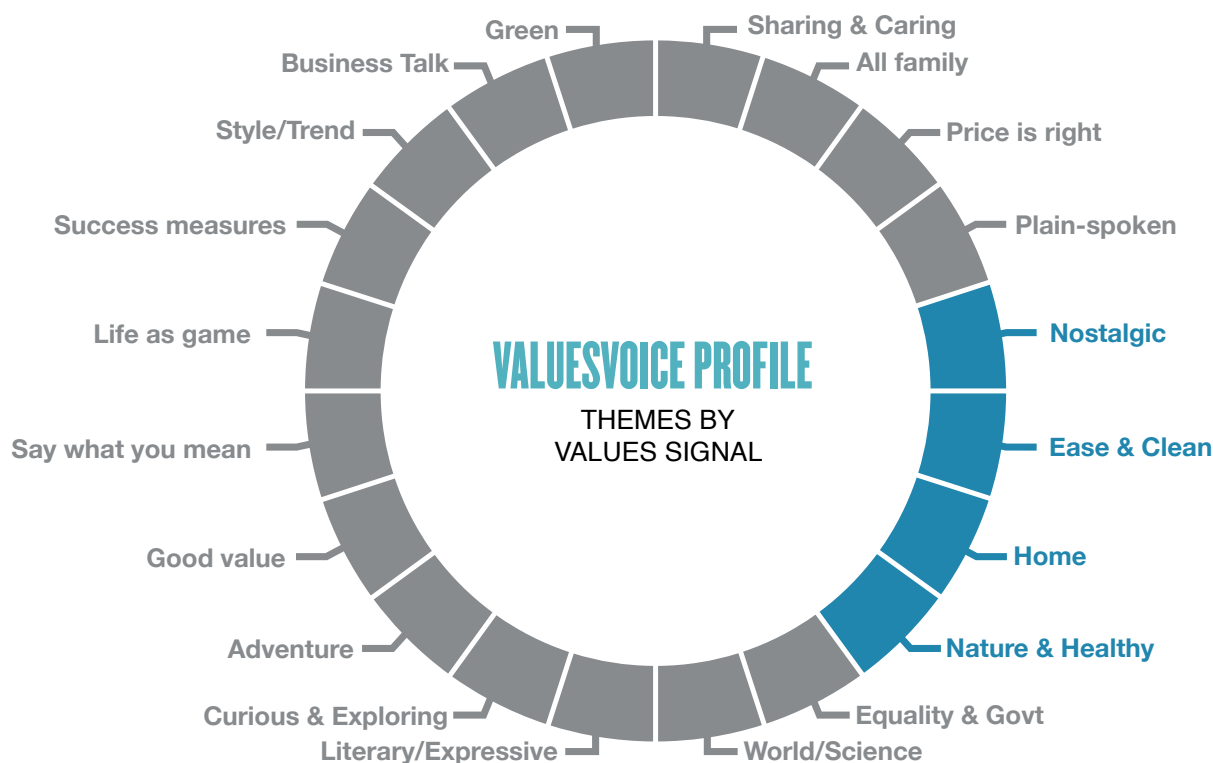


SENTIMENT





VALUES VOICE INDEX





MAIN EVENT

➤ **FOR EVERY FAMILY.
NOW IS YOUR CHANCE.
TO BE UNEXPECTED.**

**TO DO THE SURPRISING THING.
TO TRY SHOCK AND AWESOME.
TO SAY HECK YES, I'M IN.**

**SO GET UP.
AND GO PLAY.
RIGHT NOW.
TOGETHER.**

MAKE EVERY MOMENT THE MAIN EVENT.

WHY WE'RE HERE

The first Main Event center opened in Lewisville, Texas, in 1998 because the founders believed that families deserved a better place than the league-driven, dusty

bowling centers of the past. They developed an idea that became the first of its kind - a haven for families to share in a variety of activities like laser tag, gravity ropes, arcade games, billiards, and more, all under one (very big) roof.

OUR PURPOSE

We're here to make moments worth remembering. Like when dad loses to his daughter in air hockey for the first time (you know, of many). Or when the whole family puts down their phones for more than 5 minutes and instead chooses to really be together. Or for that birthday. You know, the unforgettable one that everyone talks about for years. All these moments seemed small but set waves in motion that created stronger bonds and lasting memories that extended beyond our walls.

When we say what we do matters, that's why. We serve families of all shapes and sizes. Mom, dad and the kids. Your friend family. Your work family. Multiple generations of family. They all come here for real experiences together.



MAIN EVENT

CONTINUED



EXPERIENCES

From classic games to mind-blowing social VR innovations At Main Event, it's all for fun and all-in together.

We encourage fun over the super competitive, social over solo, and accessible to everyone over games that require special expertise. Our goal with every visit is to stir children's imaginations and inspire adults to play like kids again.

FOOD

You'll Make Memories Together, And the Food is Unforgettable, Too.

We have eye-popping and over-the-top desserts like the Big Fun Sundae, craveable and indulgent family favorites like the Ultimate Pizza or the signature Main Event Burger, and elevated finger foods that satisfy cravings even while you play. For the parents, the bar is stocked with craft beers, and our skilled bartenders create unique craft cocktails that can be found nowhere else.

Main Event has handcrafted food the whole family will love with rich and visually delightful desserts they'll celebrate, too. Take a bite, make a memory, and share unforgettably delicious food, together.

BIRTHDAYS

Every birthday deserves a celebration, and we make them epic.

A birthday is a chance to show how special and unique you think your birthday boy or girl is. That's why we go all out. Parties that thrill. Fun for the kids and mom and dad too. Feasts fit for a teen. Dedicated party hosts. Between laser tag, VR, bowling, and the latest and greatest in gaming, there's no other party like a Main Event party.

EVENTS

WE MAKE EVERY EVENT THE MAIN EVENT.

Every year, we throw thousands of parties for groups, corporate events, holidays, and team-building. Whether it's a group of 10 or an event for 1,000, we'll make every event one for the history books. With handcrafted food, one-of-a-kind experiences, and real fun together, the party is always on at Main Event.

MAIN EVENT

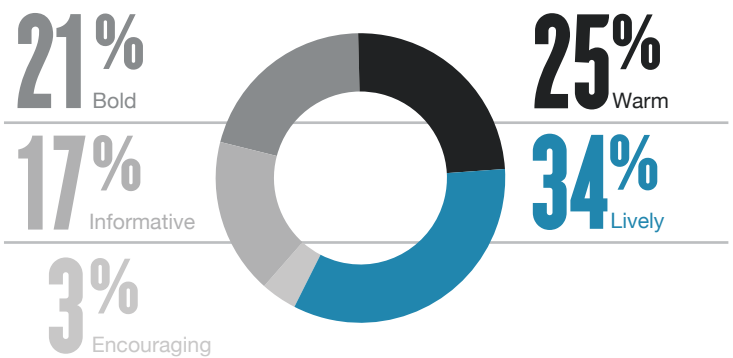
CONTINUED

AI ANALYSIS

IMAGERY + COPY

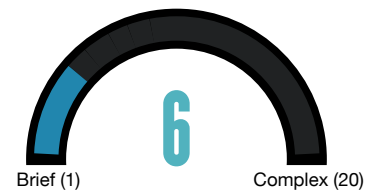
- Image and copy align with signals of “traditions,” “fun,” “achievement and competition,” and “sense of community.” Words like “epic,” “thrill,” “feasts,” “satisfy cravings” and “mind blowing,” reinforce these signals while the scene of the excited bowler and friends clapping bringing the sense of achievement.

tone PRESENCE

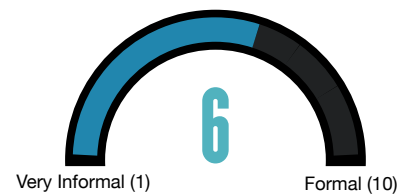


Flesch Reading Ease: 45.6
Flesch Kincaid Grade: 9.3

COMPLEXITY



FORMALITY



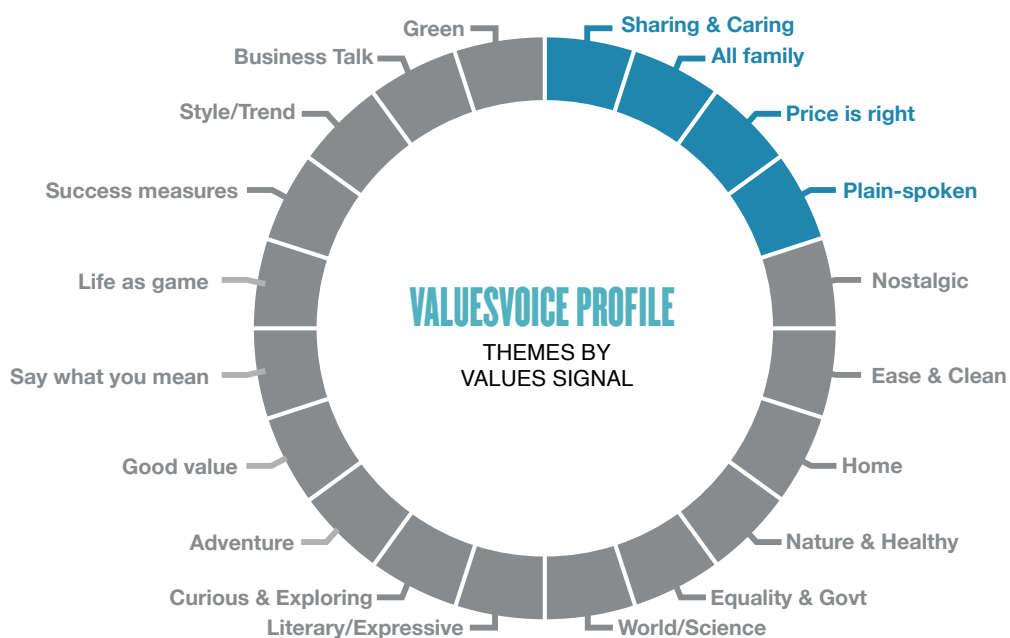
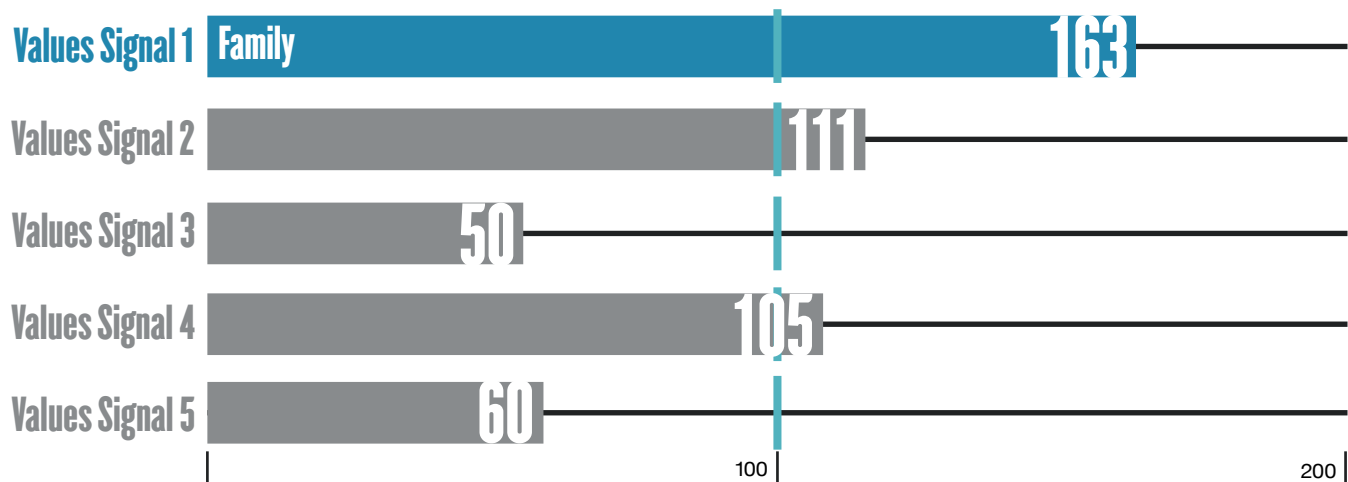
SENTIMENT



MAIN EVENT

CONTINUED

VALUES VOICE INDEX





DAVE & BUSTER'S



THE STORY OF DAVE & BUSTER

YES, THEY'RE REAL GUYS!

Back in the late 1970s, Buster opened a restaurant known for its tasty food and friendly service. A few doors down, Dave opened an outrageous place for entertainment and games where adults were irresistibly drawn for fun. The two young entrepreneurs noticed people rotating between their establishments, and an idea started to form: What if they put both under one roof?

FIRST STORE OPENS IN DALLAS, 1982

The two young men headed to "Restaurant Row" in Dallas where they found an empty 40,000 square-foot warehouse. Having been proclaimed certifiably crazy by many in the restaurant industry, Dave and Buster dove headlong into construction. With Dave's name first because he won a coin toss, they opened the first Dave & Buster's in December 1982.

OVER 140 D&B LOCATIONS

Each store has more state of the art games than ever, more mouthwatering menu items and the most innovative drinks anywhere. From wings to steaks, we've got whatever suits your appetite and our premium bar assures we're stocked to satisfy! Plus, you can watch your game on one of our massive HDTVs with epic stadium sound.



DAVE & BUSTER'S

CONTINUED



AI ANALYSIS

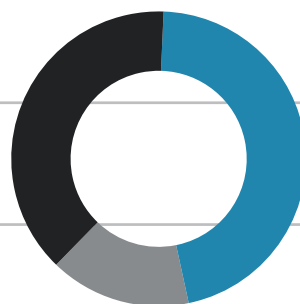
IMAGERY + COPY

- ▶ Imagery and copy have different but complimentary values signals.
- ▶ The copy leans toward “enjoyment seeking” while the image focuses more on “friends and a sense of community” showing patrons having a good time, drinking beer and coming together.
- ▶ Both copy and imagery exhibit strong “lively” and “warm” tones aligned with the focus on a quality, entertaining experience.

tone PRESENCE

39%
Lively

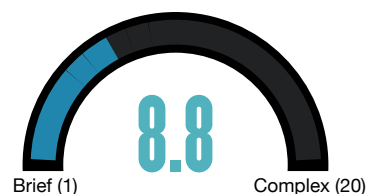
15%
Warm



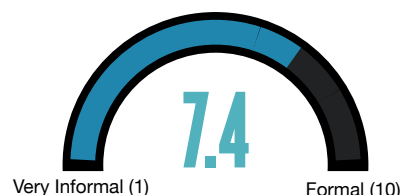
46%
Informative

Flesch Reading Ease: 47.5
Flesch Kincaid Grade: 10.2

COMPLEXITY



FORMALITY



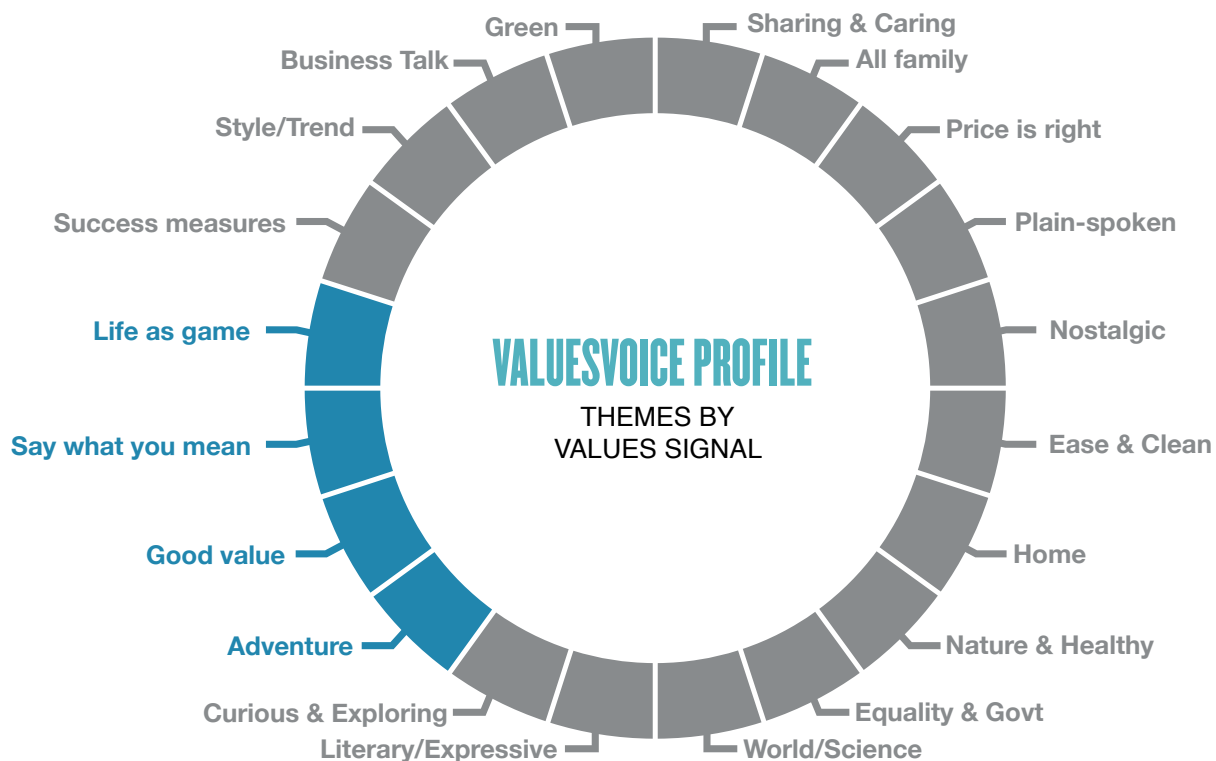
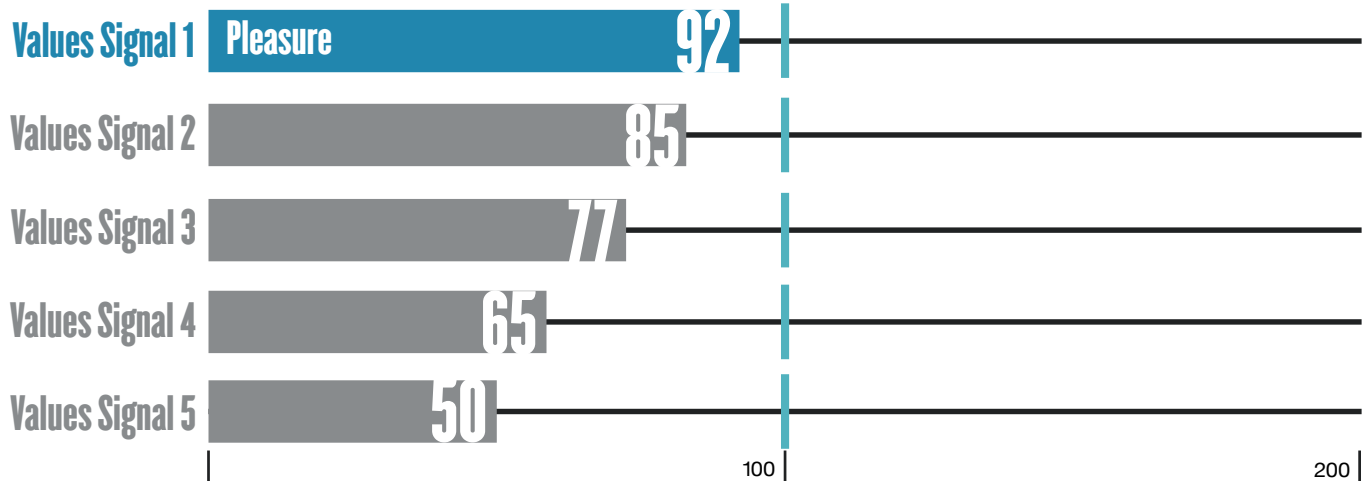
SENTIMENT



DAVE & BUSTERS

CONTINUED

VALUES VOICE INDEX





TROPICAL SMOOTHIE



OUR INSPIRATION

LET'S SPREAD SUNSHINE AND INSPIRE BETTER®

A CULTURE OF SERVICE

We make eating better easy breezy with fresh, made-to-order smoothies, wraps, sandwiches and flatbreads that instantly boost your mood.

INSPIRE BETTER® GETAWAYS

Experience the good vibes of the tropics whether you're grabbing curbside, ordering in our app or getting it delivered. It's like a tiny vacay in the middle of your day.

INSPIRE BETTER® COMMUNITIES

We make a splash in our communities by donating smoothies and food, supporting charitable organizations and sponsoring local sports programs.

INSPIRE BETTER® CREWS

Our franchise family fosters jobs that can launch a career. Our favorite recipe is hard work, fun and a diverse Sunshine Squad where everyone rocks their unique self!

INSPIRE BETTER® RELATIONSHIPS

We work with suppliers that make us a force for good. Our commitment to responsibly sourced, safe and quality ingredients means more than just delicious food and smoothies; it means we can Inspire Better® and spread sunshine all around.

TROPICAL SMOOTHIE

CONTINUED



INSPIRING BETTER MEANS BETTER VALUES

RELATIONSHIPS RULE

We're people persons. We hang on to people who feel like sunshine!

THINK BIGGER

We like to expand our horizons as wide and vibrant as a sunset.

ALL IN

We dive into everything we do with a big heart and smile.

HIGH FIVE

We celebrate every little win like there's a dance crew hyping us up.

TROPIC TIME

Tropical Smoothie Cafe® was born on a beach where people know how to live. We like things fun and playful, sunny and bright. Shake your shoes off and turn the music up. It's time to unwind.

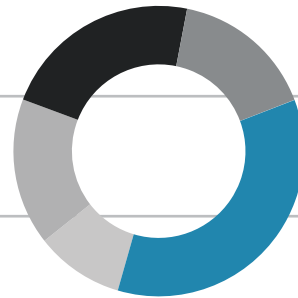
YOU'RE ON TROPIC TIME NOW.®

tone PRESENCE

22%
Bold

16%
Informative

10%
Encouraging

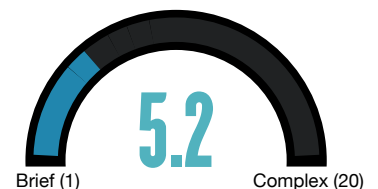


16%
Warm

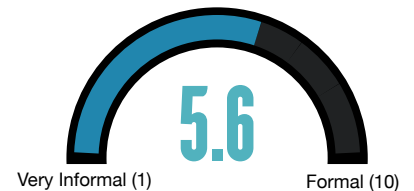
35%
Lively

Flesch Reading Ease: 47.5
Flesch Kincaid Grade: 10.2

COMPLEXITY



FORMALITY



SENTIMENT



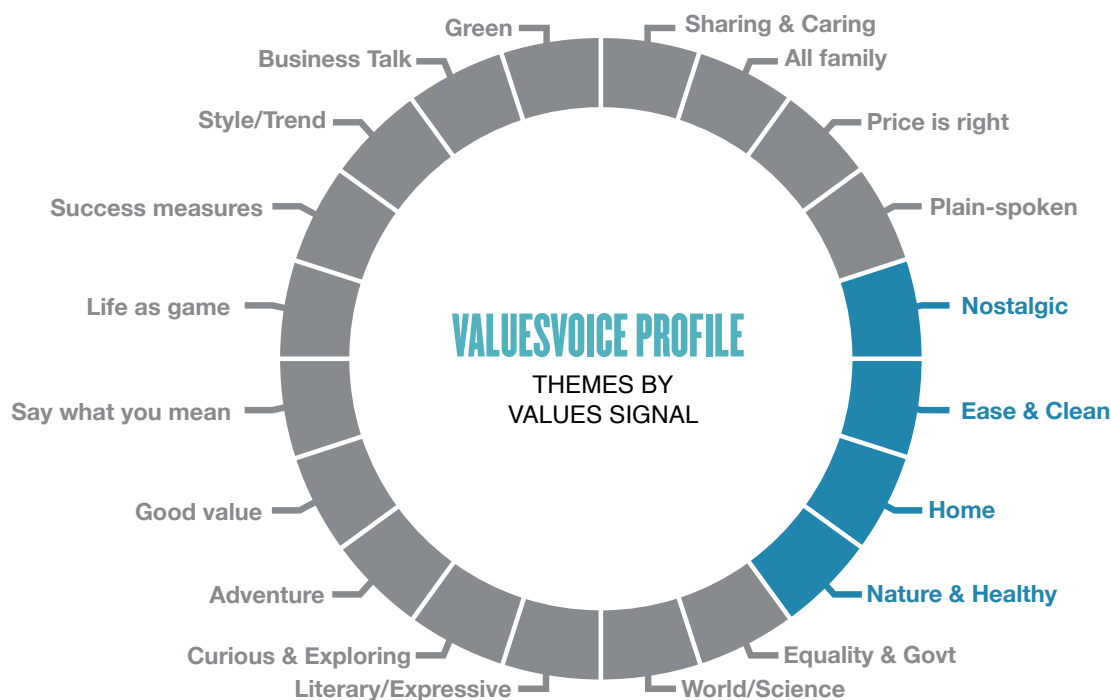
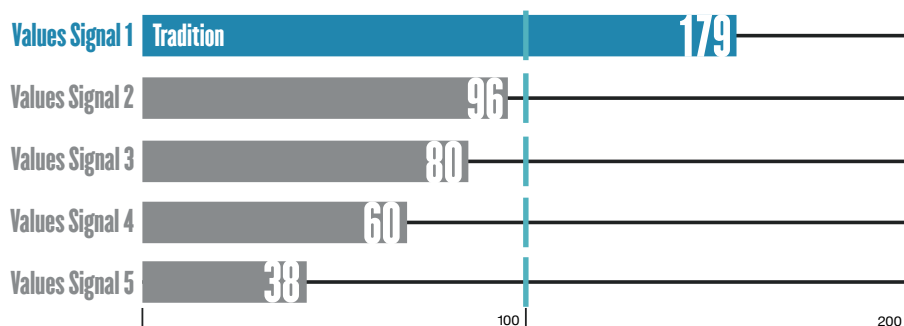
TROPICAL SMOOTHIE

CONTINUED

AI ANALYSIS

- Imagery focuses on a sense of connection to “nature” and expression by transporting oneself to the beach through the Tropical Smoothie while language reinforces “spreading sunshine” and “inspiration” with themes of simple happiness and eating better and health themes.

VALUES VOICE INDEX





EMMY SQUARED PIZZA

» SQUARE ROOTS

With our first location in Williamsburg Brooklyn in 2016, Emmy Squared Pizza is part of the Pizza Loves Emily family of restaurants, co-founded by Emily Hyland and executive chef Matthew Hyland, with partners Howard Greenstone and Ken Levitan. Offering quality ingredients and deliciously unique toppings, our signature Detroit-style pizza is marked by its square shape, crispy bottom, fluffy dough, cheesy “frico” crust, and signature sauce stripes. Our famed double-stack burger, the Le Big Matt, was named ‘#1 Best Burger in Nashville’ by The Tennessean and Nashville Lifestyles, voted one of ‘The Best New Burgers In NYC’ by Gothamist, and listed as one of the ‘20 Best Burgers in NYC’ by The Infatuation. The menu also highlights a selection of approachable salads and sandwiches served on pretzel buns.

Gaining critical claim and an ever-growing cult following, we have expanded the Emmy Squared brand with eight locations across New York City, Nashville, Philadelphia, Washington DC, and Louisville and plans to expand nationally. In every neighborhood we join, our team is committed to contributing to the community and practice our company ethos of inclusivity and unparalleled hospitality.

EMMY SQUARED PIZZA

CONTINUED



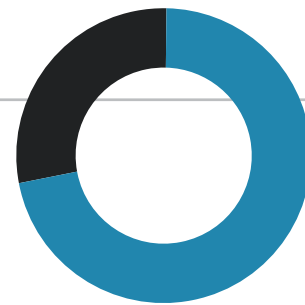
AI ANALYSIS

IMAGERY + COPY

- Image focuses on “consistency,” “variety” and “reliability” values signals with images of square pizzas with different toppings
- The copy signals most to Close to Home values including family and plainspoken, warm and informative language style, “square shape, crispy bottom, fluffy dough, cheesy ‘frico’ crust, and signature sauce stripes.”

tone PRESENCE

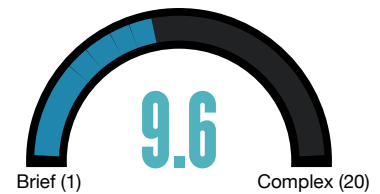
29%
Warm



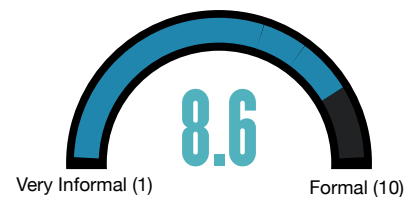
71%
Innovative

Flesch Reading Ease: 38.2
Flesch Kincaid Grade: 11.6

COMPLEXITY



FORMALITY



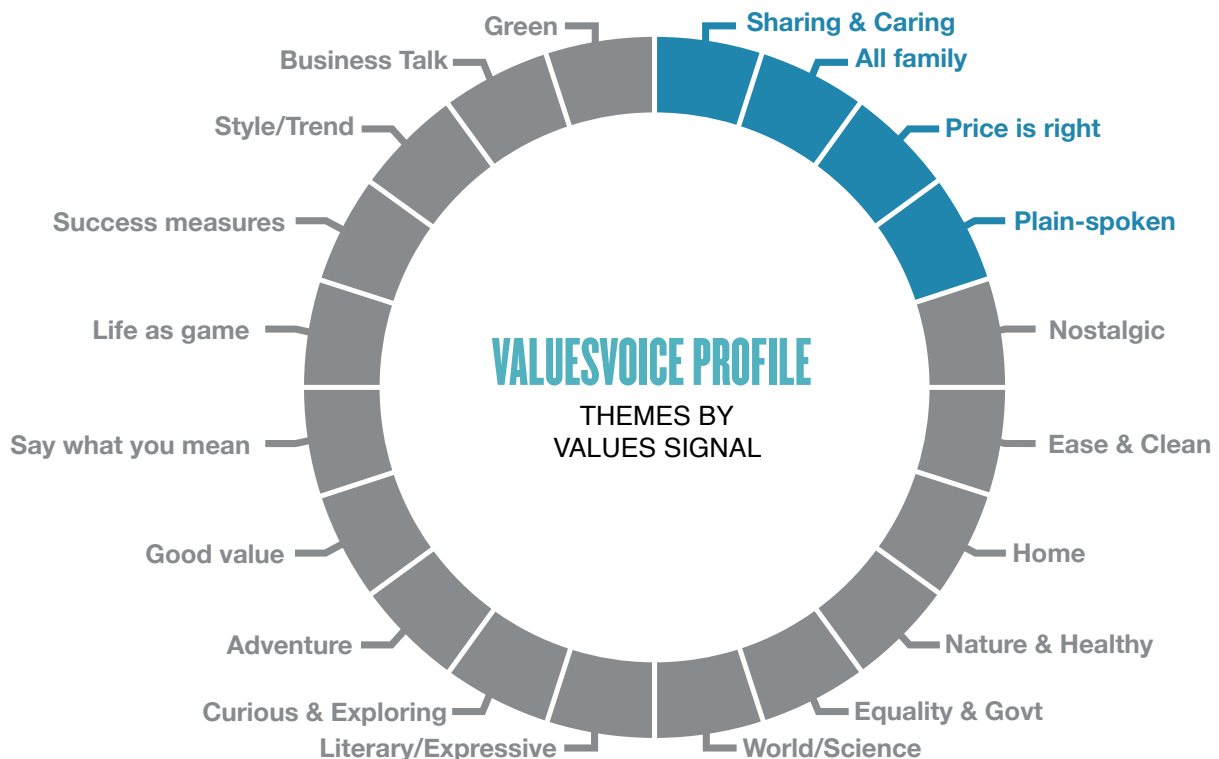
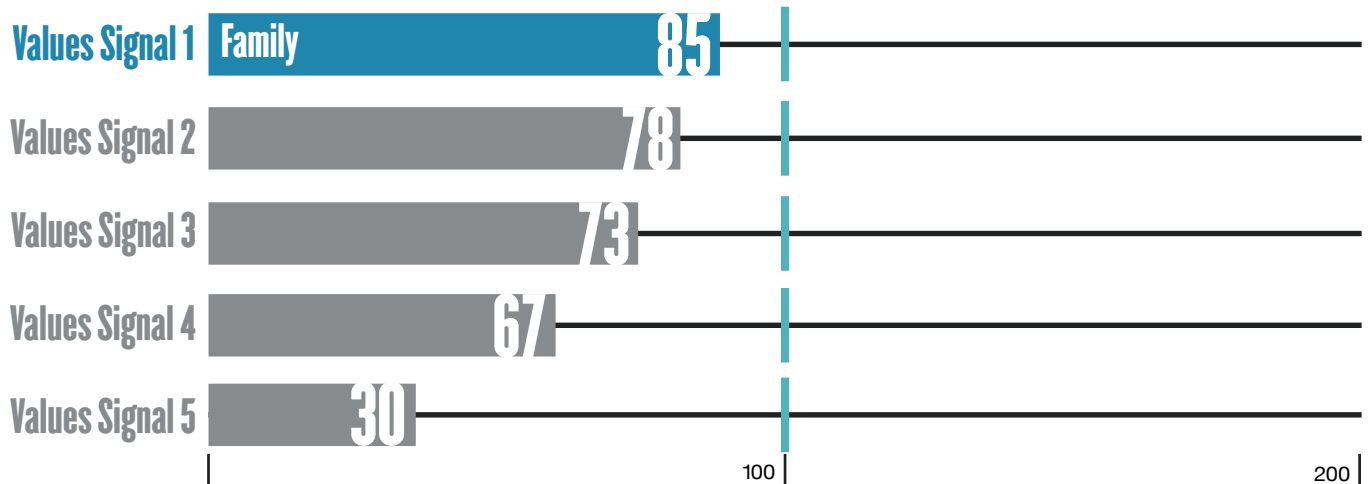
SENTIMENT



EMMY SQUARED PIZZA

CONTINUED

VALUES VOICE INDEX





pluralytics

zen 
BY ALETHEIA

HUNGRY FOR BETTER RESULTS?

LET'S CONNECT ABOUT AI ANALYSIS OF YOUR MESSAGING
TO IMPROVE PERFORMANCE.

RICK BYRNE

CMO, Aletheia | Co-Founder, Pluralitytics
rbyrne@aletheia.com

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