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## Think Outside the Box and Move beyond the Market Share

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### ABSTRACT

This research paper contributes to the newly emerged area of research that has shifted the focus of the marketers and concerned stakeholders from the conventional evaluation and assessment of measuring a company's true success; that is from market share to share of heart and share of mind. A qualitative focused group approach was applied to the study by taking two industries: Black tea and cellular telecommunication services. A total of 73 subjects were taken. Among which some were tea drinkers and some were cell phone users. It was found that the brands that had high market share did not usually have high heart share and mind share. Having a larger market share does not necessarily mean being successful in its true sense and meaning. People might just be using a brand simply because they don't have a choice. To be a winning brand with having success on all its facets and areas the marketers and concerned parties should not only focus on increasing the number of users but also focus on capturing more mind share and heart share as only then they can truly have an iconic brand.

**Keywords:** Mind Share, Heart Share, Brand Associations, Brand Perceptions

**JEL Classifications:** M14, M3

### 1. INTRODUCTION

With this changing world and growth of different ideas, it has become necessary for all the fields to be flexible. Technology is emerging, world is growing rapidly. If one is not adaptive of this change, he will surely be thrown out of this competition game. When it comes to the variety of ideas generation in different fields, marketing is one of the most significant one among them. Nowadays, almost all the work is done through marketing activities. Its scope is so wide that it can hardly be neglected. So focusing on marketing and idea generation, we can look for really unique areas within it. Such distinctive role is played by mind share and heart share in the marketing ground. Beforehand, market share of the companies was the only determinant of their popularity and success rate. Organizations used to work on market share and their target was to increase it, so that they can become market leader. Even now this practice is common but market share

is no more a determinant of success. The reason is the changing perception and increasing awareness of the products, features, its function and brands. The modern era customers are savvy, they like to have the products according to their demand and expectation. Mind share is the relative public awareness of a phenomenon. In marketing this mind share is the space that a product occupies in the mind of the customers. It also predicts the amount of mention, or reference a firm or product generates in public or media. It is possible that a company may have really high market share but quite low mind share. Another concept in this area is share of heart. The first thing that you can relate to or prefer over number of given options or choices determines the heart share. It is totally based on personal experience and can vary from person to person. It is the emotional responsiveness that customers show toward their favorite brand. Share of heart pops up the inner voice of customers, it is an emotional bond with them by building strong relationships. This can be considered as the actual success of the organizations!

## 2. LITERATURE REVIEW

Brands, specifically global brands have been successful in mushrooming around the word for quite a while. This trending was forecasted by Levitt (1983) as the key success indicator of multinational firms. The emergence along with technological advancement, existence of connected customers using Omni channels has brought on the need for these global brands to not only differentiate themselves continuously by employing various advertising and promotion regimes but also to have a platform of loyal customers who are emotionally connected and bonded to the brand. Thus the focus of product manufacturing and advertising has taken a new concept of winning the hearts of customers (Pitta, 2007). A connection at emotional level aims at capturing both mind and heart. Moreover a positive emotional bond leads to the overall success of the firm, where it has been indicated that the affective or emotional precedent of customer satisfaction yielded better results for customer loyalty as compared to the cognitive factors that constituted of price or product quality (Dean and Yu, 2001).

### 2.1. Perception

The word perception is taken from the Latin word "*percipio*" or "*perception*" which means the association, recognition, and interpretation of information (audio, visual, etc.) in order to signify and understand the environment (Schacter, 2011). Perception is that which exists in the mind as the product of careful mental activity (Roget, 2013). Consumer perception is a buyer's notion, image, awareness, knowledge and/or consciousness about a business or its offerings. In marketing field, visibility leads to recall, which means that your product has to be visually attractive. The next step is the education or knowledge of the product which leads to an understanding of the product or firm, ending up as a buying decision. So the aim of marketers is that their product starts out as the one perceived as the nearest match to the customer's needs when they are making a purchase/buying decision (ICCC, 2001).

As perception is the ability to understand, interpret or become aware of something. Customers perceive the brands positively or even negatively. This has been in focus since long time, because of its great importance in marketing world. The way a customer perceives the brand affects the growth, liking, and market, heart or even mind share of the brand. Perception is basically attached to the mental imagery; the way customers image the brand in their minds. There is an idiomatic expression: Something appears "in the mind's eye." What does that mean? According to many researchers pictorial representation is not only a map of real objects, but somewhat a reflection of the human mind that makes them (Barat, 2007). Perception is derived from cognition, which is a whole complex process in the human brain. It begins with sensation, but after that mental picture becomes quite individualized. Perception depends on experience, knowledge, cognition, or our system of symbols. It is our mind that identifies relationships between object feature values to form perceptions of sensed objects (Merleau-Ponty, 1945).

### 2.2. Share of Mind

Basically mind share is the customer's recall of manufacturers or goods in a competitive market. Consumer (or customer) refers to

the entire pool of potential sellers or specifically brands in that category. This is also known as name recognition. Mind share is the first step of the marketing tactics that results in a purchase. If a company is not on a customer's mind when they are intending to buy a product then the product will not be considered for purchase (ICCC, 2001). Mind share will lead to market share as the existence on a customer's mind is the first step necessary for a manufacturer or brand/product to be considered for a purchase, an investment or a recommendation. Extending the mindshare of the brand will certainly develop income and market share, as it can position brand's image to win, or in worst cases be forgotten as if it never existed. So in order to be successful in this global brand era a company must know how to derive dedication, loyalty and mindshare. All firm's strategies should refocus at capturing the mind share and consequently achieve the market leadership to gain the competitive advantage, for that no doubt firms must develop the integrated the marketing programs to capture the mindshare (Kambil, 1995).

### 2.3. Share of Heart

Back in history, marketers and advertisers used to focus on market share and share of mind only but now they have realized the increasing importance of achieving share of heart (Richins, 1997) (Richins, 1997). Marketers know the significance of emotions in consumer experience. Share of heart is basically based on the emotional connections built up by the consumers. Share of heart occupies space between share of market and share of mind. It is a ladder in between these two shares which connects them. It is predicated upon share of mind and usually marked as a critical originator to market share. Share of heart is one of the vital ingredients for attaining upheld competitiveness. Brand loyalty is represented by repeat purchases of the products, and this loyalty results in share of heart. This happens due to the emotional attachment that is developed through repeat purchases. Though it shows satisfaction of buyers but brand loyalty is also not a reliable marker of the share of heart. It shows the behavioral consistency only, whereas share of heart is in-depth feelings of buyers regarding the products, services or brands. The repeat purchases can be due to the two reasons; (i) Product commitment and (ii) product inertia. Among these two categories, product commitment represents emotional bonds but product inertia does not. So measuring share of heart requires measurement of product commitment, i.e. the deeper commitment to the product. Rationally this link or achieving share of heart is vital for marketers wanting to become more positively deep-rooted with their customers (Franzak, 2008). It is also important to know the hidden reason of a particular purchase made by the consumers (Wood et al., 2008). It is necessary to measure subjective feelings for measuring share of heart and exploring the reasons for those feelings (Day, 1989). Just the price of the product is not a competition in terms of share of heart, but it is the affective relationship between buyers and sellers which supports the share of heart literature (Sisodia et al., 2007). Companies can develop emotional links between customers and product through communication and relationship. Share of heart can be measured through consumers commitment with the product or how strengthen the emotional bond is and for this marketers must understand the customers psyche to gain understanding why customers prefer or purchase certain products. Share of heart can

be developed by the past and current experiences and memories that customers have with that brand or product. Product itself plays a significant role in mounting share of heart as it helps in making critical and rational connections (Dennis and Franzak, 2008).

## 2.4. Market Share

The convention indicates that share of heart leads towards share of market (Franzak, 2008). Market share is the proportion of a market, defined in terms of either units or revenue accounted for by a specific entity (Farris et al., 2010); which is a desired asset among rival companies (Armstrong and Greene, 2007). But the experts discourage this thinking of making market share an objective and a criterion for growth (Armstrong and Collopy, 1996); this supports the school of thought that says that capturing mindshare and heart share are now more vital first. Because marketers should be capable enough to transform sales targets into market share because this will show whether forecasts are to be gained by growing the total market or by capturing share from competitors (Farris et al., 2010).

## 3. RESEARCH OBJECTIVES

Three research questions/statements were derived for this study.

Research question 1 (R1): Is market share the accurate determinant of measuring the awareness and image of the brand?

R2: Do users of a brand have any emotional bonding with it?

R3: Does high market share represent high liking for the brand?

## 4. SAMPLING

A sample size of 20 people was taken for the pilot study at random. This gave us insight into the problems involved with the approach as everybody is not very aware of the tea brands. Among which some were tea drinkers and some were cell phone users. So a judgmental sampling was used in selecting tea drinkers were as a random sampling approach was used for selecting cell phone users as everybody today uses cell phones. A qualitative focused group approach was applied to the study by taking two industries: Black tea and cellular telecommunication services. A total of 73 subjects were taken. A judgmental sample of 32 female tea drinkers and a random sample of 41 cell phone users were taken.

## 5. METHODOLOGY

The research was conducted in Abbottabad, Pakistan. Two industries were focus for this study, i.e., tea and telecom. The questionnaires used in this research were adapted from the techniques given by Ellen Day in her article *Share of Heart: What it is and How it can be Measured?* (1989). The questionnaire was basically measuring three elements: Awareness about the brand, mind share and the three stages of share of heart, namely exploration, intensity and reasoning. The questionnaire was interactive which included statements, pictures and words. The statements included sentence completion and deprivation questioning. These statements were used to measure the share

of heart and mind share. The respondents were also shown a slideshow of some pictures and words. The respondents were asked to respond to these pictures and words with respect to the brands of each industry and then their responses were used to calculate the mind and heart share that these brands captured. A pilot study was first conducted by developing a draft questionnaire. The initial draft questionnaire developed was used in the pilot study conducted from 20 test subjects of two different departments of an educational institute in the city of Abbottabad. The purpose of this pilot study was to determine the validity and reliability of the questionnaire. The pilot study gave insight of the shortcomings in the initial questionnaire. The respondents were especially asked if they faced a problem in any specific question, and then these certain questions were then modified in the next questionnaire; and upon their indication a couple of words were replaced by their easier synonyms.

The entire questionnaire was a mix of open-ended and close-ended. In the close-ended statements of the questionnaire it was asked what respondents felt about their brand.

The questionnaire consisted of two parts. First part included close-ended statements and second part included pictures and words. The statements measured perception, mind share, and first two stages of heart share i.e., exploration, intensity and the words from the slide show measured reasoning stage of heart share. The respondents were to answer the statements by mentioning a single telecom/tea brand. The pictures in the questionnaire for telecom industry depicted certain personalities and the respondents were asked to write the brand which they thought these personalities might use. As in the case of the tea brands the pictures showed different scenarios and situations in which tea might be consumed or preferred. The respondents were asked to name a brand of tea that they might use if they were in a similar scenario. Then a slideshow of words were shown which the respondents had to associate with a single brand. A well chosen pool of words was selected for each industry. These words were related to the quality, service, and perception of the brands. These words and picture were used to determine the perception of people about the brands.

A total of 100 questionnaires of both industries were distributed. The telecom ones were distributed to the cell phone users in a private college belonging to different departments with varying knowledge and awareness about the brands in order to have a diverse audience; and the tea questionnaires were distributed among the teachers of a government school in Abbottabad. 100% questionnaires were received from both the institutes but due to incomplete and inappropriate responses only 80% out of the total of tea brand questionnaires and 68% (26.8% females and 73.2% male) out of the total of telecom questionnaires provided accurate responses and so were selected. In case of tea brand study all respondents were female respondents. As females have greater knowledge of tea brands and mostly they are responsible for grocery, so we kept our focus on female gender only in case of this industry. Another valid reason for only focusing on females was their sense of identification and inclination towards a particular flavor that a tea brand offered.

## 6. MOBILE NETWORK/TELECOM INDUSTRY

The telecom sector in Pakistan comprises of five service providers: Mobilink, Telenor, Ufone, Zong and Warid. These telecom brands have been under consideration throughout this research. A stratified random sampling technique was used and the different departments of the institute were taken as different strata.

### 6.1. Mobile Network Analysis

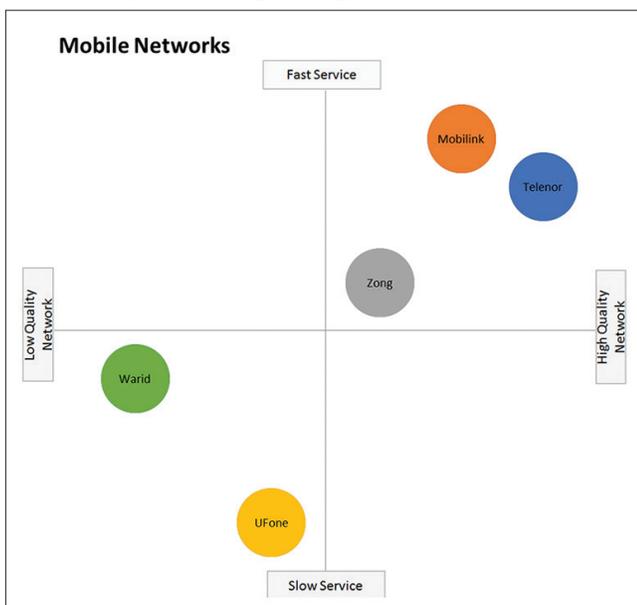
The questionnaire was analyzed by calculating the percentages of response against every brand. The statements were divided according to the element they were measuring (perception, mind share, heart share). The brand that had the most percentage showed its favorable strength in that area. In the first step the percentages were calculated for every single question. This gave us certain basic knowledge about the specific aspects of brands. Then the overall percentage was calculated for mind share and heart share.

#### 6.1.1. Perceptual map

A perceptual map is a graphical method to plot the perceptions of customers. For the mobile networks we took two variables quality and service speed by plotting quality on the on the x-axis and service speed on the y-axis. The perceptual map was based on the template available online, that limited to give the coordinates ranging from 1 to 9, for that purpose the actual responses for each telecom brand were coded as Mobilink (7.5, 9), Telenor (9, 8), Zong (6, 6), Ufone (4, 1) and Warid (1.5, 4). Where 1 on x-axis means lowest quality and on y-axis it means slowest service; and 9 x-axis means highest quality and on y-axis it means fastest service. This is shown in Figure 1.

Three out of five brands have an overall positive performance, which are Mobilink, Telenor and Zong. Among these, Telenor and Mobilink have been ranked as very high performers by the respondents while Zong is marginally good. Ufone and Warid have been ranked as the networks with comparatively slow service and low quality.

Figure 1: Perceptual map of mobile networks



#### 6.1.2. Association map

The association map of mobile networks comes from the respondent’s associations with some pictures and words. The pictures used showed different personalities. A pool of words was used that reflected different attributes of the networks. The respondents were asked to associate these pictures and words with the first brand that came into their mind. We have shown the Figures 2 and 3 of top two brands Zong and Telenor and have linked them with the attributes and personalities that most people had associated with them.

#### 6.1.3. Measuring share of heart and mind share

Heart share is measured through three stages. The first is exploration, second is reasoning and the last is intensity. In the questionnaire ten questions were of heart share which were based on these three stages. According to our study the brand with the highest heart share is Telenor, the second is Ufone, third is Zong, Mobilink is Fourth and Warid is the last. The approximate percentage figures are given in Table 1.

Mind share was calculated by asking a few questions. In which we asked about the first brand that came into their minds. According to mind share the first was Zong, second was Telenor, third is Ufone, Mobilink is fourth and Warid is again last.

The Table 1 shows the comparison of market share, share of heart and mind share. The market share of the telecom industry has been taken from Pakistan Telecommunication Authority survey report. As seen in the case of mobile networks the largest market share has been captured by Mobilink but Telenor has the most share of heart and Zong has the highest mind share. From this we can see that the ranks of the networks are changed except Warid which consistently low.

In the part of the study where personalities were to be linked to a specific brand the respondents gave us their views. According to them 36.58% of all housewives, 24% of all senior citizens, 39% of all shopkeepers/vendors and 26.8% of all laborers use Ufone. Telenor is used by 26% of all businessmen and 29.2% of the respondents think that Telenor is used by chatterboxes. Zong is used by 36.5% of all teenagers according to the test subjects. These three brands (Ufone, Telenor and Zong) are the highest used brands by the above mentioned personality types. This has been illustrated in Table 2.

## 7. TEA INDUSTRY

The tea industry in Pakistan comprises of several tea providers: Lipton, Brooke Bond Supreme, Tapal, Vital, Taiz Dum, Presidenty,

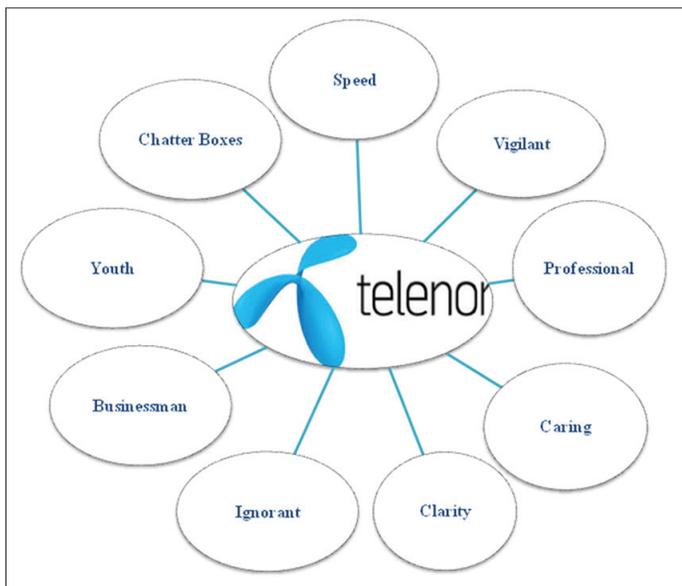
Table 1: Comparison of market share with heart share and mind share of mobile networks

Brands	Market share (%)	Share of heart (%)	Share of mind (%)
Mobilink	27.7	13.6	18.2
Telenor	26.1	30.7	26.6
Zong	19.4	22.9	27.8
Ufone	17.4	28.7	23.1
Warid	9.3	3.9	6.0

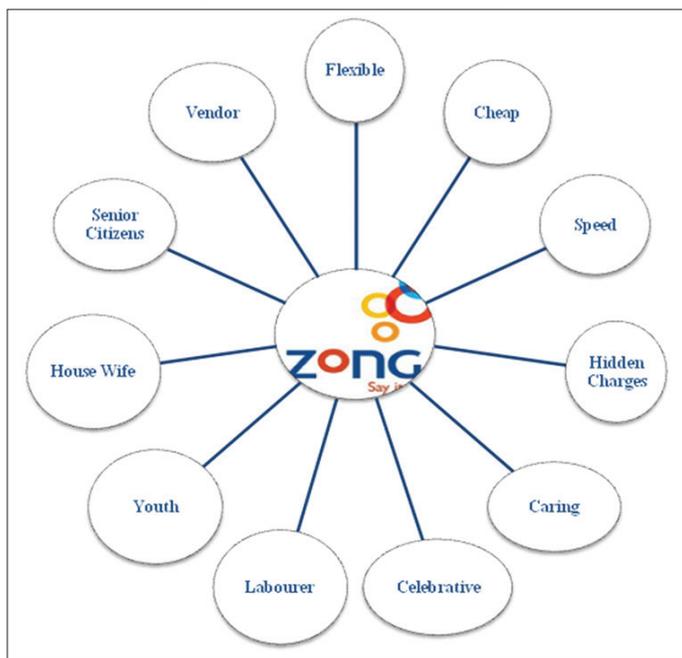
**Table 2: Top brand used by different personalities**

Personality	Vendor	Housewife	Businessman	Laborer	Teenagers	Senior citizens	Chatterboxes
Top brand	UFone	UFone	Telenor	UFone	Zong	UFone	Telenor
Percentage	39.0	36.6	26.0	26.8	36.5	24.0	29.2

**Figure 2:** Association map of Telenor



**Figure 3:** Association map of Zong



Firdous, Tetley, Khuli Chai. Among these the top three brands are Tapal with 24% market share, Brooke Bond Supreme with 21% and Lipton with 15% (Gallup, 2014). Judgmental sampling technique was used for tea brands survey. Though tea is widely used in Pakistan, but its brand identification is rare, as people like to have tea but do not focus on the difference of brands. So to get the accurate results, we opted for judgmental sampling: People who take tea daily and are quite fond of it and those who can differentiate between the tastes of various brands.

**7.1. Tea Industry Analysis**

The first stage of analysis was identifying the top tea brands. This was done by simply calculating the frequency of each tea brand as a response to enlisted items, and finding a percentage by dividing it with the total number of sample. After calculations the top tea brands came out to be Lipton and Brooke Bond Supreme with 62.50% and 12.29% respectively.

The second phase of analysis consisted of finding the awareness, mind share and heart share of tea brands. The questionnaires were analyzed by calculating the percentages of response against every brand. The statements were divided according to the element they were measuring (awareness, mind share, heart share).

**7.1.1. Perceptual map**

We have also developed a tea brand perceptual map that uses tea brand perception: Strong flavored on y-axis and relaxing on x-axis, these words have been taken from the slideshow that we have already shown to our respondents. The template available online limited us to give the coordinates ranging from 1 to 9, for that purpose the actual responses for each tea brands were coded as 1 = 0, 1.25 = 1, 1.5 = 2, 1.75 = 3, 2 = 4, 2.25 = 5, 2.5 = 6, 2.75 = 7, 3 = 8, 3.25 = 9, 3.75 = 11, 4 = 12, 4.25 = 13, 4.5 = 14, 4.75 = 15, 5 = 16, 5.25 = 17, 5.5 = 18, 5.75 = 19 and 6 = 20. With these codes the tea brands were plotted on the perceptual map (Figure 4).

Lipton (6, 5.25) was plotted in the first quadrant with the most favorable results for being strong flavored and most relaxing of all tea brands. Brooke Bond Supreme (3, 2.25) followed by Tapal at (2.5, 2.25), Vital (1, 1.25), Presidency (1.25, 1.5), Firdous (1.5, 1.5), whereas the rest of the brands were out of bounds of this map.

**7.1.2. Association map**

An association map shows the linkages and associations that a consumer attaches with a particular brand mentally, as the top brand that our survey indicated was Lipton; an association map was developed that took the concepts and terms from the pictures and words from the slideshow. 13 associations were drawn, in which Lipton had the highest scores. These associations were relaxing, breakfast, rain, Hi-tea, headache, refreshing, active, warm, chai, strong, study, cold and fragrant (Figure 5).

**7.1.3. Measuring awareness, mind share and heart share**

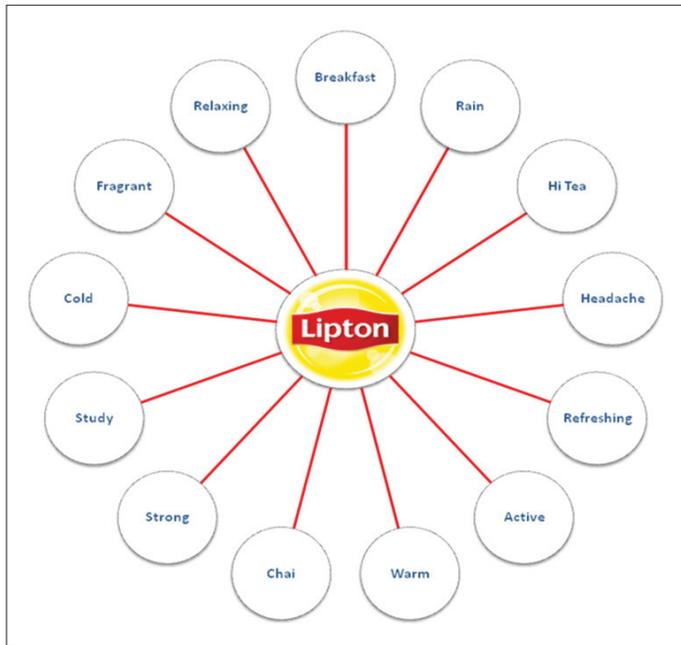
The findings showed that 67.85% people are aware of Lipton, 11.60% of Brooke Bond Supreme, 9.37% of Tapal, 6.25% of Firdous, and 4.91% of Presidency. Whereas Vital, Tetley, Tez Dum, and Khuli Chai had no awareness at all.

According to our findings, Lipton had the highest mind share of 68.75% followed by Brooke Bond Supreme with 12.5%, Tapal and Firdous 6.25%, and Presidency 4.68%; whereas Vital, Tetley, Tez Dum and Khuli Chai had no mind share.

**Figure 4:** Perceptual map of tea brands



**Figure 5:** Association map of Lipton



The results obtained from the above mentioned three stages had been consolidated into a final percentage of share of heart. Where Lipton had the leading heart share of 61%, Brooke Bond Supreme had a heart share of 12.6%, Tapal 12.2%, Firdous 6.6%, Presidenty 4.9%, Tetley 1.2%. Whereas Vital, Tez Dum and Khuli Chai had negligible heart share with 0.5%, 0.4% and 0.4% respectively.

Our findings also indicated that 43.75% of tea consumers will trade their favorite tea brand for larger quantities of any other tea brand. While, 56.25% will not trade their favorite tea brand for larger quantities of any other tea brand.

The approximate percentage figures are given in Table 3.

**Table 3: Comparison of brand awareness with the heart share and mind share of tea brands**

Brands	Market share (%)	Share of heart (%)	Share of mind (%)
Lipton	15.0	61.0	68.7
Tapal	24.0	12.2	6.2
Brooke Bond Supreme	21.0	12.6	12.5
Vital	1.0	0.5	0
Presidenty	N/A	4.9	4.7
Firdous	N/A	6.6	6.2
Tetley	2.0	1.2	0
Tez Dum	1.0	0.4	0
Khuli Chae	7.0	0.4	0
Others	3.0	0.2	1.7

## 8. ANSWERS TO THE RESEARCH QUESTIONS

**R1:** Is market share the accurate determinant of measuring the high awareness and positive image of the brand?

R1 was negated as it was clear from the study that market share did not reflect the awareness and image perception of a brand. As seen in the case of the top market share holders they were not necessarily the most popular ones. In tea brands it is evident that Lipton has the highest awareness of 68.7% but only 15% of the total population actually uses it. Similarly in telecom industry where Mobilink having the highest market share is lagging behind Telenor in awareness and positive image.

**R2:** Do users of a brand have any emotional bonding with it?

From the extensive study conducted on tea drinkers and cell phone users R2 was not supported. A lot of people complained about the brand that they were using (mostly in the case of cell phone users) or desired to use some other more worthy brand but could not switch to it either due to the brand's premium prices or because of the switching cost associated. However those customers who were very much satisfied with their current brands did have strong emotional affiliation with them, such customers were nominal in number.

**R3:** Does high market share represent high liking for the brand?

Not necessarily. Market share only represents the percentage of consumers from the total who are using a particular brand. Heart share represents liking and fondness for a brand. As it can be seen in the case of Mobilink which has the highest market share but Telenor and Ufone are the brands that are liked most by the people. Same is the case with tea brands, where Tapal clearly dominated with 24% market share but only has a heart share of 12.2%, which is insignificantly low as compared to Lipton's 64%.

## 9. CONCLUSION

The results derived were compared to the percentage market share of their respective brands. The variations among the different shares tell us that marketers should not just focus on capturing the market share but also the heart and mind share. Having a

higher market share does not necessarily mean that people have a liking for that brand or it is the first brand that comes in their consideration set while making a purchase decision.

These facts are an eye opener for the brands as they tell us that marketers need to promote their brands in such a way that will ensure the capture of all these three shares in order to build a strong, coherent and iconic brand that has a strong favorable image and gives high profitability. A brand should capture a customer's mind, heart and their share of wallet. Being the top profitable brand does not mean that the brand is liked by most people. From the results it is clear that it is not necessary that people are using a certain brand because they like it, they might be using it because it is hard to switch to another or due to affordability reasons.

As seen in the case of mobile networks the largest market share has been captured by Mobilink but Telenor has the most share of heart and Zong has the highest mind share. From this we can see that the ranks of the networks are changed except Warid which consistently low.

As seen in the case of tea brands the largest market share has been captured by Tapal (Gallup, 2011) but Lipton has the most share of heart as well as the highest mind share. This can lead to downfall of Tapal in future, because mind share and heart share play important role in capturing market share. Eventually, this mind and heart share overcomes market share!

## 10. MANAGERIAL IMPLICATION

The results show a great opportunity for managers. They should focus on improving their brands' mind and heart share. This is the area in which future competition will lie. They should develop marketing strategies and advertisements that focus on increasing share of heart and mind. Otherwise, they can lose their market leadership.

## 11. FUTURE RESEARCH

This research was conducted on specific product categories, i.e., mobile networks and tea brands. Further research is required to be conducted in this area on other brands.

Diversified demographics of the subjects can be considered, gender being the most obvious one in case of tea brands for future studies as it was conducted only on female population. Lastly, this research can be conducted in other regions of the country or the world as

well. Sampling can also be improved by increasing the size of the samples or by using more consistent sampling techniques.

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