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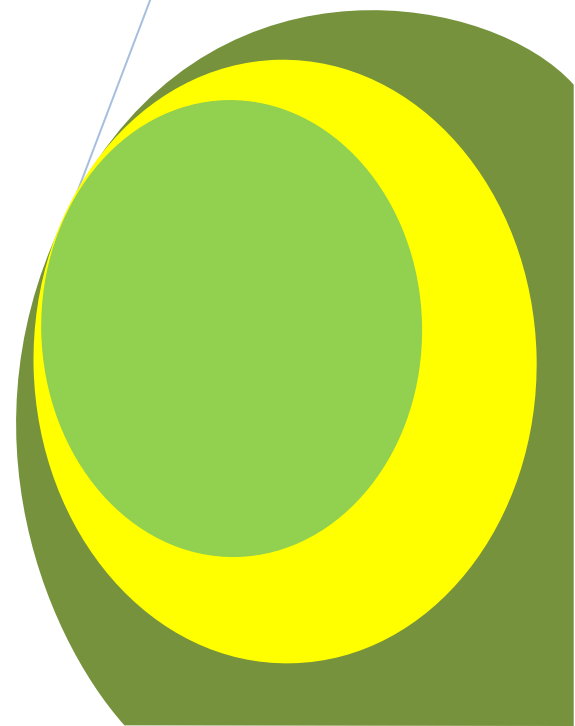
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Evaluating Share of Mind and Share of Heart in the Fast Food Sector: A Case Study of Zimbabwean Fast Food Outlets

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Evaluating Share of Mind and Share of Heart in the Fast Food Sector: A Case Study of Zimbabwean Fast Food Outlets

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ABSTRACT

Competing strategies have been found to be costly than focusing on the consumer. Businesses need to focus on how to increase their appeal to customers. This study aimed at evaluating the share of mind and share of heart for the leading fast food outlets in Harare. A questionnaire survey was administered on customers from the five leading fast food outlets in Harare. Chicken Inn emerged the lead outlet on customer share of mind and share of heart.

Keywords: Market Share, Share of Mind, Share of Heart, Fast Foods Industry.

INTRODUCTION

Recently, businesses have been shifting focus from competition to engaging consumers intensively. Competition in its highest form can leave all players worse off. It does not get better with new players coming on-board every day as advances in technology and proliferation of business know-how makes it easy for new players to come in. The key success factors for market leaders are no longer defined by their ruthless military counteroffensive efforts (Ho and Choi, 1997), but by what is valued by customers. A successful market leader should understand customers and not be carried away with understanding competitors (Rodie and Martin, 2001). This is true for the Zimbabwean fast food sector where there are too many players in relation to the market size. With the demise of major industries due to the economic hardships, people are venturing in low capital intensive business like fast foods. Chicken Inn, Chicken Slice, Pablo's, Wimpy, African Fried Chicken, TN Grill, Food Express and KFC are the some key players operating in the Zimbabwean fast foods sector. There is intense battle for market share between these players such that astute marketing is required for a business to stay afloat. Burns and Warren (2008) introduced the concept of consumer warfare, where the battlefields have shifted to the mental processes of users.

This study intends to establish the share of mind and share of heart for fast foods with being the focal point Chicken Inn as the lead fast food entity. This will help management craft strategies to win the minds and hearts of consumers.

LITERATURE REVIEW

Market share, share of mind and share of heart are three measures in marketing that relate the company to the customer. They will be discussed in as far as they relate to fast food outlets with special focus on Chicken Inn.

Market Share and Fast Foods Firms

Market share analysis evaluates a company's performance in comparison to that of its competitors (Jobber, 2010). This is the percentage of a market's unit or revenue sales accounted for by a specific firm in an industry. For this study there will be need to measure market share of Chicken Inn in Harare market. There are two basic measures of market share, namely; the absolute market share and relative market share. Absolute market share is the basic percentage of a firm's sales to the total industry sales, as on the main definition above. Relative market share measures a firm's or brand's market share against that of its leading competitor. The formulae are shown below.

1. Absolute market share=
$$\frac{\text{Firm's Unit or Revenue Sales}}{\text{Total Industry Unit or Revenue Sales}}$$
2. Relative market share=
$$\frac{\text{Brand's Market Share(Unit or Revenue)}}{\text{Largest Competitor's Market Share (Unit or Revenue)}}$$

When a brand is a market leader its relative market share has a value greater than one (Jobber, 2010). A large relative market share in a BCG analysis shows a high competitive strength (Kotler and Keller, 2006). This means Chicken Inn might need to compare its market share with that of Chicken Slice, its close competitor in the Harare market. Overallly, we can say market share reflects the power of share of mind and share of heart developed in customers, such that we can have a simple equation as: Market share= Share of Mind + Share of Heart.

Mind Share and Fast Food Industry

Mind share is defined as the level of cognitive information about a company that a consumer has. It is to do with brand recognition and recall (Kotler and Keller, 2006). Mind share is calculated by the percentage of consumers who were able to identify a firm when answering a question such as: 'Name any three companies you know in the fast foods industry?' The company that is named first has a higher share of mind than those named later. One of the key questions in our study is that: 'Where is Chicken Inn in the mind share continuum of fast foods firms in Harare?' Mind share is constructed around awareness, top of the mind and advertising awareness metrics. General awareness considers the proportion of total population that is aware of a brand, whether asked by someone or not asked. It provides information about who got information about the brand (Kotler and Keller, 2006; Srinivasan et al, 2010). Top of mind provides customer's first brand to consider, while advertising awareness specify the percentage of total population that is aware of a brand's advertising messages. Advertising awareness may be increased by higher frequency and timing (Kotler and Armstrong, 2013)

Share of Heart and Fast Foods Outlets

While marketers pursue market share, and advertisers strive for mind share, both have need to understand the significance of the share of heart (Richins, 1997). Share of heart in the business world means the affect relationship between a consumer and a particular brand, product or service provider (Wood, Pitta & Franzak, 2008). It represents a degree of consumer commitment and emotional bonds that underlie a relationship with a product or service. Share of heart or brand love is a marketing construct that assesses satisfied consumers' passionate and emotional attachment to particular brands (Wood, Pitta & Franzak, 2008; Srinivasan, Vanhuele & Pauwels (2010). Share of heart is calculated by the percentage of consumers who identified the company when answering a questionnaire item requiring them to: 'Give any three firms from whom you prefer to buy a product'. Another powerful question in this measure is to ask customers: 'Would you recommend brand X to a friend or colleague?' This question provides insight into the strength of customer relationships with the brand and the company (Jobber, 2010).

Share of Heart can be given by measures of; share of requirements/wallet, beliefs, purchase intention, loyalty and willingness to recommend. Share of requirements provide the level of brand purchases as a proportion of total market purchases. It answers the question: 'How committed are current consumers to a product or brand. Brand beliefs indicate the conviction by customers to the brand's attributes and performance (Kotler and Keller, 2006). Purchase Intention provides a measure on the willingness of customers to purchase a brand. Loyalty is the willingness of the customer to stay and continue shopping on one shop or buying one product. The question here is whether Chicken Inn consumers are loyal to their firm. Willingness to recommend shows willingness to recommend to friends, relatives and even the spouse. It shows loyalty and potential impact on others.

Brand love or Share of heart is linked to higher levels of brand loyalty and positive word of mouth. The importance of share of heart is felt when there is a deeper understanding of why a consumer made a particular purchase (Wood et al, 2008). Fast food firms need to form positive emotional bonds that will bind a customer to a brand (Wood, Pitta and Franzak, 2008). Without a bond to the product, these consumers will inevitably switch brands when new players come in. Building relationships and share of heart seems to be an effective defense available to Chicken Inn against aggressive promotional and product design efforts by other competitors like Chicken Slice, KFC, Pablo's, TN Grill and Wimpy (Wood, Pitta and Franzak, 2008).

MATERIALS AND METHODS

A descriptive survey was carried out on 130 customers from the top five fast food outlets. Twenty six (26) respondents were selected using systematic sampling from each of the five selected fast food outlets. The questionnaire consisted of structured questions for which frequencies were computed. Validity was ensured by pre-testing the questionnaire on Chicken Inn customers so ensure appropriateness, meaningfulness, and usefulness of questions. The Cronbach's alpha for share of mind and share of heart was found to be generally acceptable at the value of 0.543. Percentage frequencies were used to analyse the data which was then presented through tables, graphs and figures.

RESULTS AND DISCUSSION

Share of Mind and Share of Heart of Chicken Inn Customers

To get the proper position of Chicken Inn's future, the study measured the soft metrics of share of mind and share of heart of the respondents. These measure the long-term effects of advertising, price, distribution, and promotion strategies as suggested by Srinivasan et al (2010). We need to consider the results shown on the table below.

Table `1 Share of Mind and Share of Heart of Chicken Inn Customers

Variable	Outlet	Number of respondents	Percentage
The Most Visited Fast Food Outlets In Harare	Chicken slice	120	52.2
	Wimpy	6	2.6
	TN Grill	4	1.7
	Pablo's	13	5.7
	Chicken Inn	86	37.4
	Other outlets	1	0.4
Awareness and Product Category Association: Name of Fast Food Company Mainly Known For Fast Food In Harare.	Chicken slice	91	39.6
	Wimpy	5	2.2
	TN Grill	4	1.7
	Pablo's	11	4.8
	Chicken Inn	119	51.7
Recommending A Friend To Chicken Inn	Yes	224	97.4
	No	6	2.6
Always Buying Food From Chicken Inn	Yes	210	91.3
	No	20	8.7
Last Time When One Bought From Chicken Inn	In the past 3 months	21	9.1
	In the past 6 months	60	26.1
	In the past 9 months	25	10.9
	In the past 12 months	27	11.7
	In more than 12 months ago	77	33.5

The Most Visited Fast Food Outlets in Harare

Consider the diagram below for the discussion that follows.

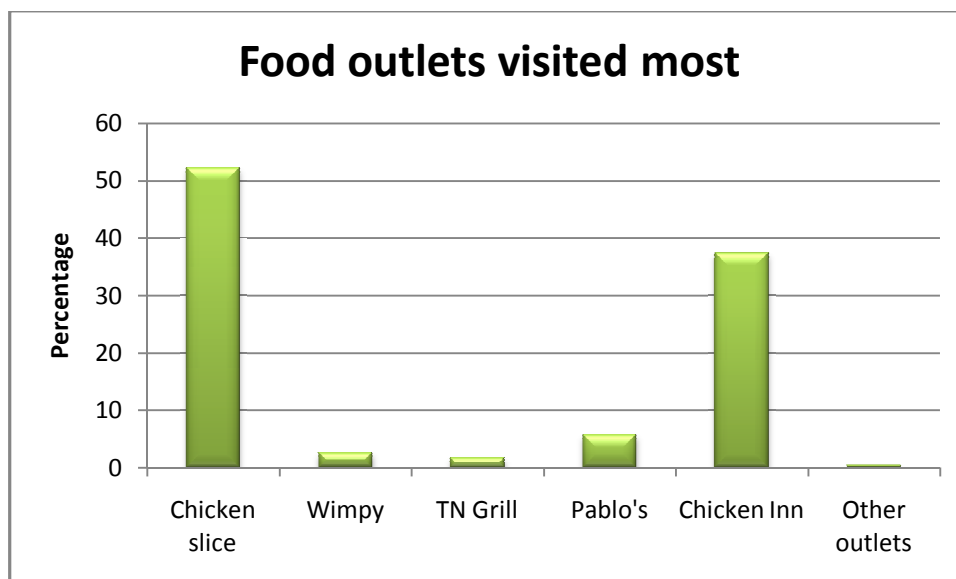


Figure 1: Food Outlets Visited Most

This measures both share of mind and share of heart. The ability to recall a shop and being in top of the mind shows more information about it. From a list of six options the respondents said they visited Chicken Slice more frequently with 52.2%. This was followed by Chicken Inn with 37.4%. Pablo's got 5.7% of the frequency of visits. The relatively lower frequency of visits might mean that the respondents have significant behavioural loyalty and less attitudinal loyalty to Chicken Inn (Srinivasan et al, 2010). When asked on "why do you go to other restaurants", the respondents complained of food taste, poor complaints handling and unfriendliness of staff to customers (Reinartz and Kumar, 2002). Chicken Inn needs to win back the share of heart shown by lower visit by customers.

Awareness and Product Category Association: Name of Fast Food Company Mainly Known for Fast Food in Harare

Consider the diagram below for the discussion that follows.

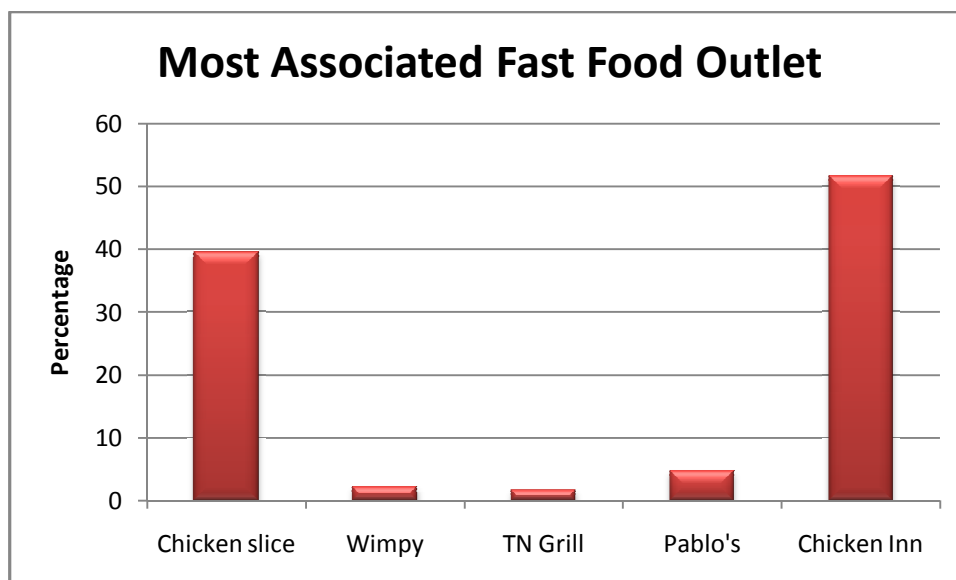


Figure 2: Most Associated Fast Food Outlet

The measure gave the share of heart and share of mind. When consumers associate a supplier to an industry product it means the company is in the heart. The ability to recognise and recall companies gives some measure of

mind share (Kotler and Keller, 2006). Chicken Inn was associated to the industry by 51.7%, Chicken Slice got 39.6%, Pablo's got 4.8%, TN Grill got 1.7% and Wimpy was rated 2.2%. Chicken Inn is leading but with just about 50% lead. They might need to get a market understanding to get it right with their customers. Share of heart can be built through emotional marketing, effective service recovery, using naturally outgoing employees and making facial and eye contact with customers (Wood, Pitta and Franzak, 2008).

Recommending a Friend to Chicken Inn

Consider the diagram below for the discussion that follows.

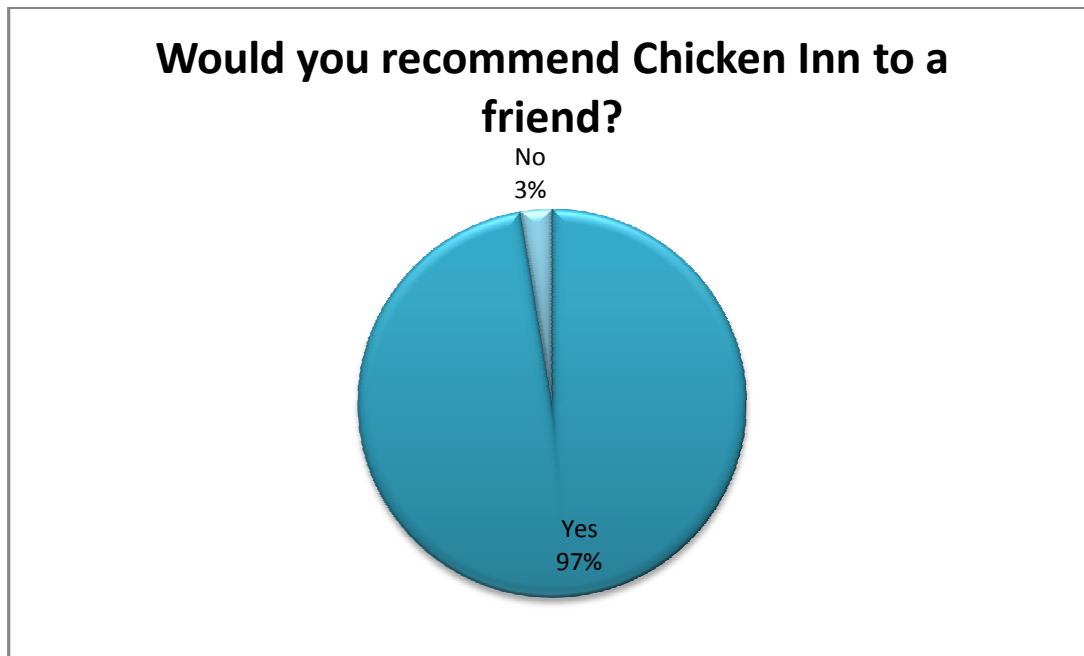


Figure 3: Level of Recommending Chicken Inn to A Friend

This is purely a measure of share of heart. Research results showed that 97.4% would recommend a friend to the Chicken Inn fast food outlet. There could be key aspects that make Chicken Inn special. Factors like cleanliness, longer operating hours, conveniently located branches and availability of seats could have created a positive share of heart. Willingness to recommend indicate that you are also willing to come back with that person or even alone (Jobber, 2010).

Always Buying Food from Chicken Inn

Consider the diagram below for the discussion that follows.

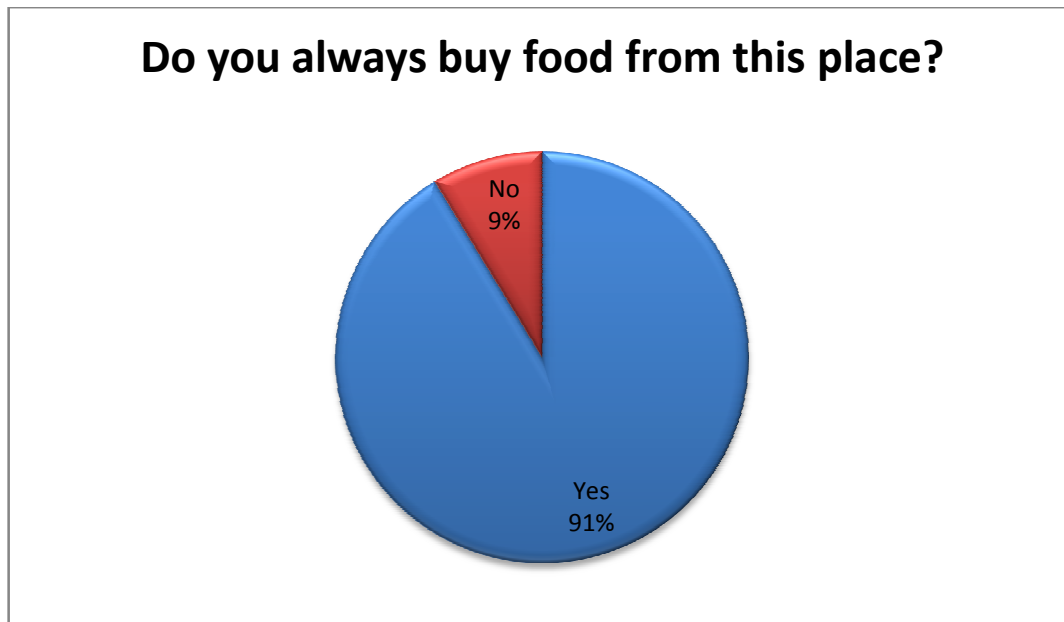


Figure 4: Level of Buying From Chicken Inn

There was a positive response (Yes) of 91.3% and 8.7% said NO. Though there was no specified frequency and time intervals in the survey questionnaire, customers indicated their commitment to buy from Chicken Inn (Wood et. al, 2008). Though respondents could have been biased to suit the suggestive question type of yes/no, Chicken Inn is offering some more acceptable fast food service. This indicates a positive share of heart.

Last Time When One Bought From Chicken Inn

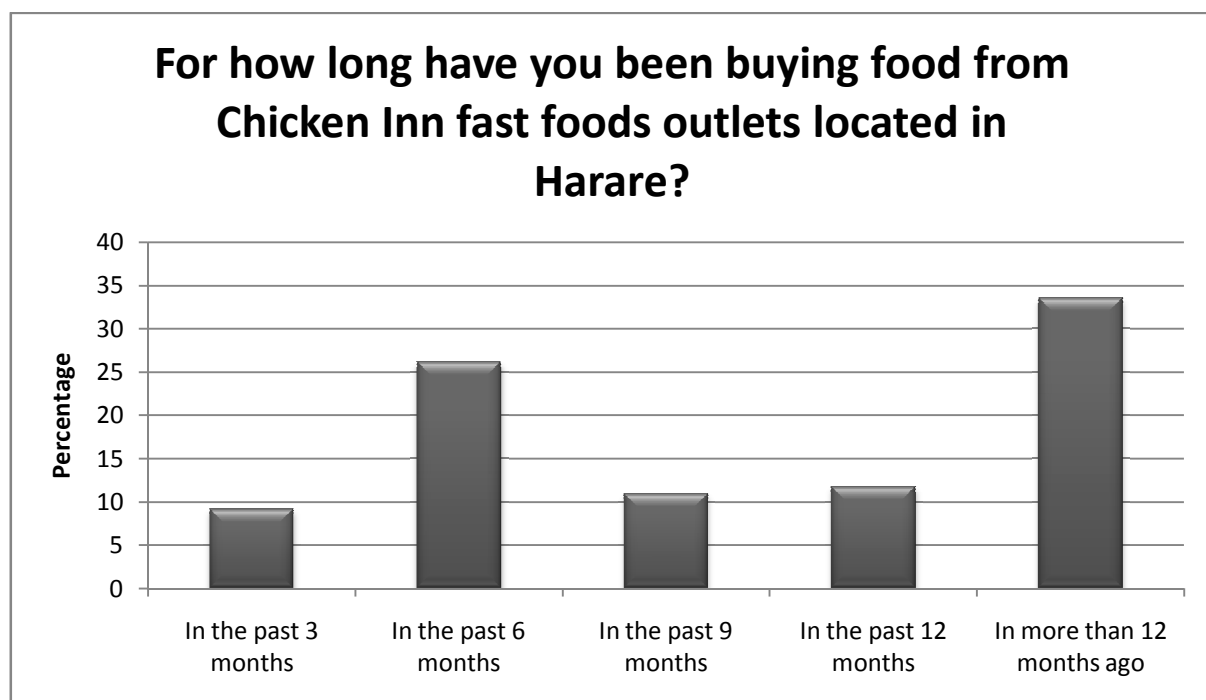


Figure 5: Time One Last Bought From Chicken Inn

The majority of customers (33.5%) said they last bought in more than 12 months ago, while 11.7% last bought in the last 12 months, and 10.9% last bought in the past 9 months. A combined 35.2% bought from Chicken Inn in the past

3 to 6 months. There are more loyal customers than the 33.5% who last bought in more than 12 months ago. Some customers just visit the fast food restaurant to sit without buying, others visit the bathrooms and some visit to make a purchase of food. Why does it take a combined 56.1% of customers to come back at '9 and above months' interval to a fast food shop? What keep them away? These questions need to be answered by Chicken Inn before it designs any strategy for growing and defending its market share. Some extremes could also be caused by respondents forgetting dates and over estimating by 2-3 months. The general view on this area is a low share of heart and low product commitment by consumers (Wood, Pitta & Franzak, 2008), which contradict the yes/no question results. An improved repeat purchase shows high share of heart if it is associated with food purchases (Dagevos and Ophem, 2013)

CONCLUSION

It is concluded that share of heart is highest for Chicken Inn with the firm's name being the most associated with product category, willingness to recommend to friends and always buying from the outlet. Chicken Inn was found to be losing some business to Chicken Slice as the latter turned out to be the most visited outlet. The mind share could be increased by advertising through radio and fliers, billboards and participation on social responsibility activities. The share of heart of Chicken Inn can be improved by making customer consultants where they can solve customer problems without harassing them.

COMPETING INTERESTS

The authors normally patronize Chicken Inn. This may have had a bearing on their assessment of the fast food outlets.

AUTHORS' CONTRIBUTIONS

The corresponding author came up with the idea and then worked with the co-author on all other aspects.

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