



**Laddering: A “How to Do It”
Manual – with a Note of Caution**

By
Abrafi Saaka
Graduate Student-CIRP Program

Chris Sidon
Graduate Student-CIRP Program

Brian F. Blake, Ph.D.,
Director-CIRP Program

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Brian F. Blake, Ph.D.
Senior Editor

Jillian M. Hughes
Co-Editor

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I. INTRODUCTION

An effective marketing strategy for a product or service requires an understanding of consumers' purchasing behaviors. If marketing researchers can identify the salient factors that consumers consider in evaluating alternatives and the personally relevant reasons why those factors are important to consumers, then successful marketing strategies can be developed to appeal to those consumers.

Laddering is a technique that has been used, for example, to suggest communication themes that "tug at a person's gut." It has been employed to identify emotional obstacles that face a political candidate running for elected office. It has revealed product features that can appeal to buyers at a very deep level. While some researchers have used the technique with great success, other researchers have been known to find themselves overwhelmed by the subtleties of the technique and to have felt it necessary to drop it.

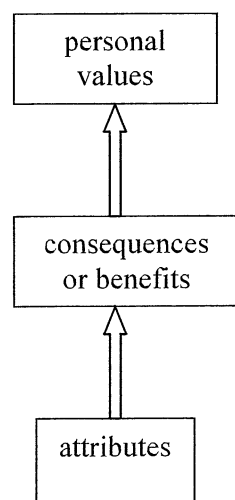
An Example

Consider a consumer purchasing a car. That car has various attributes or features, e.g. leather upholstery, a turbocharged V6 motor, two doors. Each attribute has particular consequences, as that consumer sees it. The motor lets him out accelerate many other cars on the highway (a positive consequence in his eyes), but also can cost more to operate (a negative consequence). These consequences are meaningful in light of that person's values. The turbocharged V6 helps him achieve his value of feeling strong and powerful, a master of his own fate. The higher cost of operation with this motor, though, interferes with his value of seeing himself as a responsible husband and father, a selfless provider for his family.

Basic Perspective

Laddering is based on a means-end theory; it attempts to identify the product attributes that elicit preference within a particular product class category. The attributes of products and the consequences (both positive and negative) that are associated with usage are the “means”. The “ends” are the desired outcomes expressed in terms of the consumer’s personal values. These values are assumed to be reached through the consequences. (Reynolds & Gutman, 1988; Myers, 1996). Consumers assumedly choose actions that produce desired and/or minimize undesired consequences. Therefore, consumers (through their buying behavior) learn to associate specific consequences with specific product attributes and this knowledge drives them to choose products that have the relevant attributes to help them achieve their desired goals.

A major assumption of the means-end theory is that consumers’ product knowledge is organized in a hierarchy with concrete thoughts linked to more abstract thoughts in a chain progressing from a means to an end. Thus, the more concrete features or characteristics of a product, the attributes (A), are connected to the more abstract ideas about psychological and social consequences of the attributes (C). These psychosocial consequences or benefits (derived from using the product) are in turn connected to the most abstract element of the three, the values (V).



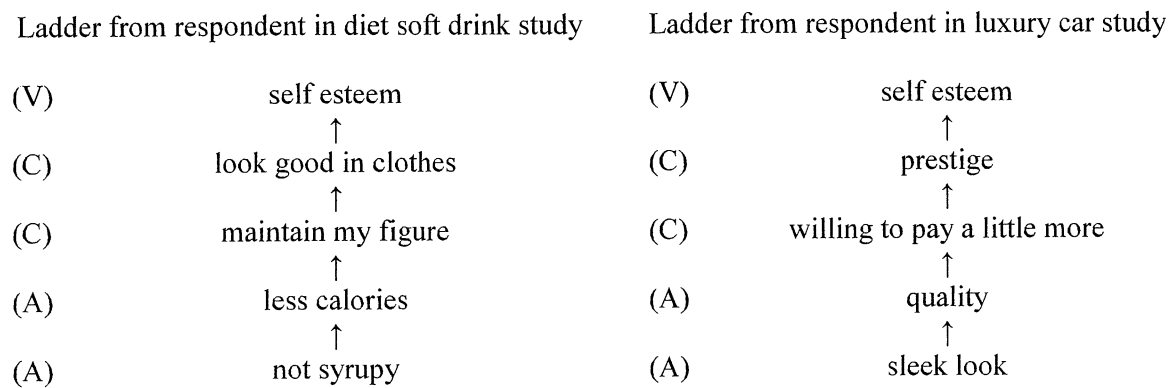
The end state is purported to be the real reason why a consumer uses the product i.e., how it helps the individual achieve his/her desired goals.

Laddering is an in-depth interviewing and qualitative analysis methodology based on the means-end theory. A laddering interview involves using a series of directed probes to uncover the full range of attributes (A), consequences (C), and values (V) associated with a selected product in a given product class.

Overview

The in-depth interviewing technique prompts the respondent to think critically about the connections between the product's attributes and his/her personal goals (the motive behind one's preference for that particular product) thereby revealing the A-C-Vs. In figure 1 below, the diagram on the left is a ladder from a single respondent in a diet soft drink study; the diagram on the right is a ladder from a luxury car study:

Figure 1: Ladder Examples



The analysis of the laddering data across respondents begins with a summary of the major elements by content-analysis procedures. A summary table is then constructed to reflect the number of connections between the elements. From this table, the dominant connections are

then graphically represented in a tree diagram, termed the hierarchical value map (HVM). The HVM is structural in nature and is a representation of the linkages across levels of abstraction without reference to specific brands. The HVM is then used to recommend marketing and/or communication strategies.

II LADDERING METHODOLOGY

The question that should be answered before a laddering study is launched is: who are the relevant people to be interviewed? For developing positioning strategies for products, the relevant people may be customers (brand users) whose beliefs are critical to fully understanding the competitive set of brands in the market. Since laddering involves detailed probing about consumers' brand beliefs, respondents must be knowledgeable about the specific brands in the category. One way often found to be useful is to classify brand users by frequency of use and relative loyalty.

As a general rule of thumb, it has been suggested that a minimum of 20 respondents should be included in any single subgroup. Because each respondent typically provides about 3 ladders, and ladders usually have an average of 5 elements, ladders from 20 respondents can produce a minimum of 225 data points (taking into account that one-fourth of respondents generally do not go beyond one ladder). Hence, a relatively small sample size can provide considerable detail about consumer choice and brand distinctions.

The laddering procedure involves three stages. 1) Elicitation of differences among brands, 2) in-depth interviewing and 3) analysis of the data.

Eliciting Differences Among Brands

In the first stage of the laddering methodology, respondents are asked to make comparisons between brands in a product class. There are three general methods of eliciting such distinctions between products:

- 1) Triadic sorting involves presenting the respondent with three products and asking them to explain how two of the products are the same and therefore different from the third product. In the case of a diet drinks study, for example, some of the distinctions could be:

- cola versus uncola
- coke versus pepsi
- plastic bottle versus glass bottle

- 2) Preference differences is another useful device for eliciting distinctions. Here, respondents are asked to rank their preferences and explain why one is more desirable than the other. Queries about instances where less liked brands are used more frequently than more liked brands enables the respondent to think about other instances in which an attribute of a less preferred brand may appear attractive. This in turn helps respondents to make meaningful distinctions among the products.
- 3) Differences by occasion presents the respondent with a personally meaningful context within which to make the distinctions. Sometimes the distinctions elicited are such obvious characteristics of the product that they do not permit advancement to more personally meaningful areas from this starting point. Thus, helping the respondent think of some frequent usage occasions provides another way for the respondent to think about differences among the stimuli.

Once a satisfactory number of distinctions has been elicited for a given product (typically 10 to 15 attributes), the interviewer can select which ones will serve as the basis for building ladders, or he/she could have the respondent rate the relative importance of each of the attributes and select those with the highest ratings.

The Interviewing Environment

Naturally, the interviewer should try to build rapport with the respondent even before the first stage (elicitation of distinctions) of the interview, and one should do one's best to maintain good rapport throughout the rest of the interview. Letting the respondents know in advance that there are no right or wrong answers may go a long way in helping them become relaxed. Doing

so would also further reinforce the notion that the purpose of the interview is merely to understand the ways in which the respondent sees this particular set of products. Also, because of the personal nature of the later probing process, creating a slight sense of vulnerability on the part of the interviewer may help the respondent realize that the interviewer is merely a trained facilitator of this discovery process and not a judge or evaluator of the respondent's ideas. This can be achieved by telling the respondents that many of the questions may seem "somewhat obvious and possibly even stupid," thus, associating this predicament with the interviewing process, and creating the impression that the interviewer is a mere facilitator following certain guidelines.

By continually asking, "why is that important to you?" the interviewer maintains control of the interview and creates the perception of being genuinely interested. Because it is critical that the interviewer is perceived as an interested but neutral recorder of the information, the interviewer's reactions (both verbal and non verbal) should be as neutral as possible. It is essential that an interviewer has a thorough understanding of the means-end theory so that they are able to identify the A-C-Vs as they are brought forth by the respondents.

In Depth Interviewing Techniques

Two basic problems have been known to arise during the laddering interviews: 1) the inability of respondents to articulate why a lower level (ie, more concrete) issue is important to them; 2) the tendency of respondents to try to avoid answering probes that are too personal or sensitive. In the first instance, asking the respondent to imagine what would happen if the consequence expected is not delivered may help uncover the nonconscious reason—this is known as "negative laddering". In the case of stalling or avoidance due to sensitive issues, the interviewer could try to move the conversation into a third person format, thereby creating a role playing exercise, or use self disclosure (a delicate procedure) to overcome this obstacle. Self-

disclosure should only be attempted by an experienced interviewer, though, since it involves the interviewer revealing a relevant personal fact about himself/herself to help the respondent feel less inhibited in comparison. A frequently more feasible option is for the interviewer to make note of the problem area and return to it when other relevant information is uncovered later in the interview.

The following is an excerpt of a hypothetical interview done by Reynolds and Gutman (1988) in a wine cooler study. It illustrates the technique of unblocking respondents when they cannot advance beyond a certain level.

Interviewer: You said you prefer a cooler when you get home after work because of the full-bodied taste. What's so good about a *full-bodied taste* after work?

Respondent: I just like it. I worked hard and it feels good to drink something satisfying.

Interviewer: Why is a satisfying drink important to you after work?

Respondent: Because it is. I just enjoy it.

Interviewer: What would you drink if you didn't have a cooler available to you

Respondent: Probably a light beer.

Interviewer: What's better about a wine cooler as opposed to a light beer when you get home after work?

Respondent: Well, if I start drinking beer, I have a hard time stopping. I just continue on into the night. But with coolers I get *filled up* and it's *easy to stop*. Plus, I tend to not eat as much dinner.

Interviewer: So why is continuing to drink into the evening something you don't want to do?

Respondent: Well if I keep drinking I generally *fall asleep* pretty early and I don't get a chance to *talk to my wife* after the kids go to bed. She works hard with the house and kids all day—and it's really important that I talk to her so we can keep our good relationship, our *family life*, going.

Typically, two or three ladders can be obtained from approximately three-fourths of the respondents interviewed. This means that one-fourth of the respondents cannot go beyond one ladder. A typical laddering interview takes about 60 to 75 minutes to complete—from eliciting distinctions to completing an in depth interview that has solicited enough elements to complete a ladder.

III. ANALYSIS

The basic analysis steps can be summarized as follows:

Step 1: Reducing the raw interview data into the A, C, or Vs ladders. This process involves a thorough review of the verbatim notes of video/audio tapes of the interview.

Step 2: Content analysis of the element selected in step 1

Step 3: Summation of relations in content codes, resulting in an implication matrix of all paired relationships.

Step 4: Construction of a diagram to meaningfully represent the main implications of the study, the hierarchical value map (HVM).

Now for more detail let us use the wine cooler study with its data and tables from Reynolds and Gutman (1988).

Step 1: Converting the raw interview data into ladders.

Below is a summary ladder from the interview from the wine cooler study (see Table 1 for the full set of ladders).

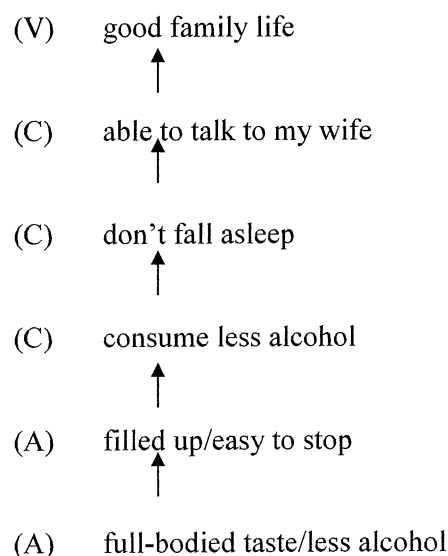


Table 1: Set of Ladders for Hypothetical Wine Cooler Study

LADDER 1		LADDER 2		LADDER 3	
V	Sense of belonging (part of the group) ↑	V	Good family life ↑	V	Responsibility to family ↑
C	Socialize ↑	C	Able to talk to my wife ↑	C	Waste money ↑
C	Avoid getting drunk ↑	C	Don't fall asleep ↑	C	Throw it away (don't drink all of it) ↑
A	Less alcohol	C	Consume less alcohol ↑	C	Gets warm ↑
		A	Filled up/easy to stop ↑	C	To much to drink ↑
		A	Full bodied taste/less alcohol	A	Larger size
LADDER 4		LADDER 5		LADDER 6	
V	Like my coworkers (belonging) ↑	V	Self-esteem ↑	V	Completing a chore (accomplishment) ↑
C	Sophisticated image ↑	C	Status symbol ↑	C	Reward ↑
C	More feminine ↑	C	Impress others ↑	C	Thirst quenching ↑
A	Bottle shape ↑	C	Quality ↑	A	Crisp ↑
A	Fancy label	A	expensive	A	Carbonation

Figure 2: Hierarchical Value Map of Wine Cooler Study.
(Reynolds and Gutman)

