



Learn to

LOVE LADDERING

Easily reach emotional benefits in qualitative research

Resource Book and slides to help you learn, use,
and teach this powerful process



Laddering (Means End Chain), Pyramiding and 5 Whys

Learning Resource Book

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Introduction: how to run successful training in Laddering (Means End Chain), Pyramiding, and 5 Whys

What are they and why are they included together?

These are closely allied techniques that use the concept of a hierarchy and repetitive questioning to move up or down it.

Laddering and Pyramiding. Using Laddering during interviewing, or as a pilot study, saves time on analysis and gives richer results. It can be used formally in a Laddering interview, or informally as a questioning technique even in a group. You can use Laddering during analysis as a thinking tool.

Means End Chain is a reformulation of Laddering, but the process is the same. The reformulation is more marketing friendly and there is more published material on market research applications.

Pyramiding is the reverse of Laddering. You start with a concept (or technically a construct) like Trust; a big fat word that could have many meanings, and unpick the meanings it has in this context.

5 Whys is a problem solution process, where you start with a problem and discover its root cause by repeatedly asking why.

How long does it take to run the training?

Basic Laddering can be done in 45 minutes. Miss out the theory; give a basic explanation of what it is and why it's so important. Show some examples, and then go through an example with the group on a flipchart. You need only generate 4 or 5 characteristics and then ladder up on 2-3 of them, for people to get the idea. Then allow them to try out Laddering on each other, working in pairs. They will get stuck and make some mistakes, so finish with a hints and tips section.

Laddering and Means End Chain full training takes about 2 hours.

1. Include an outline of the theory
2. Choose a relevant case study from the list and talk through it.
Use this to illustrate the benefits of Laddering.
3. Do a group exercise in Laddering and then set the delegates an exercise in pairs. Get them to choose a subject relevant to their work. It helps the training to stick.
4. Let one person in each pair complete the Laddering – stop and review. Correct any mistakes.
5. Allow the second person to complete – stop and review.
6. Discuss Means End Chain and how to analyse Laddering.
7. Finish with an example of Pyramiding and allow everyone to try it out on each other. (Takes about 5 minutes, since the rest of the theory is in place)

Laddering, Pyramiding and the 5 Whys full training takes 3 hours

Follow Laddering Means End chain process as above. Have a short break – this helps to reinforce that 5 Whys is slightly different – it is a practical problem solving process. Like Laddering, it seems easy in principle, but is harder in practice. Make sure you include a practice session.

What you have in the training pack

In this document

- The psychological background (Personal Construct Psychology) in outline (and references if you want to read further).
- Definition and uses of Laddering and Means End Chain
- Links to published papers, if you want original sources
- How to run the exercises
- Theory and practice of Pyramiding
- The 5 Whys technique and how to do it

In the chart deck:

The set is divided into a general introduction, theory, examples, how to do Laddering, and analysis. There are separate sections on Pyramiding and 5 Whys. If you are teaching, be sure to delete or hide the ones you are not going to use.

If you just want to learn it for yourself



If you learn best by having a go first, look at the slides, watch the videos, and then have a practice with a colleague.

If you want to know the where it comes from and/or how you can use Laddering, flip through this resource book first, read up the parts that interest you, and then go to the slides and videos.

When you first use Laddering on a project, its best to try a few interviews at the pilot study phase. This will show you how useful it is without generating masses of data. Once you are comfortable with the process the analysis becomes much easier.

Use Laddering to help you understand:

- **Why do people buy and use products and services – beyond the superficial?**
- **What are the emotional benefits of the features?**
- **What goals do consumers want to reach?**
- **How can we segment people by emotional benefits?**
- **What are the underlying values that drive choices and behaviour?**

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Background to Laddering and the Means End Chain - the Basics of Personal Construct Psychology (PCP)

It is not necessary to be aware of the theory behind Laddering to be able to use it, but you can do it with greater finesse if you understand the thinking behind it. You will have a deeper knowledge of the type of 'qualitative data' you are dealing with.

Personal Construct Psychology (PCP) was founded by George Kelly, who wanted to understand how individuals 'construe' (make meaning of) the world. It is an individual-based psychology founded on the idea that we all see the world through our own 'goggles'. The lenses are made from our previous experience. However we can share and communicate with others because of shared experience, language, social and cultural factors.

The theory is a form of Constructivism – according to some academics, the underlying philosophy of qualitative methodology. **Qualitative research is about understanding the meaning people ascribe to things and events and PCP gives us some powerful tools for this.**

Kelly's theory has been described as "every man his own scientist". Each person notices repeated themes in his life, names and categorises them, and then applies these labels to the people and situations he meets.

For example, a man might notice that the people with big noses he meets all are friendly and have a good sense of humour. He is using the **constructs** 'big nose – small nose' and 'good sense of humour – no sense of humour', and when he meets a new person he will (subconsciously) notice their nose and anticipate what kind of sense of humour they will have. His expectations will lead to him behaving more warmly and openly to people with big noses and it is quite likely his theory will be proved as they will be more friendly back. (Please note that we cannot assume 'small nose' is the opposite of 'big nose' for this man. It might be 'normal nose' which for him is the critical difference between people.)

We make no value judgements about the validity or logic of these constructs in PCP. We have to accept that it may be odd, but it is his way of looking at the world. **It is important to remember this when doing Laddering or Kelly Grids – it may not make sense to us, but it is their world we are looking at.**

PCP is based on working with the individual's **construct system**, a very extensive and complex hierarchical network of inter-relating constructs. **Construct hierarchies have a pyramidal** structure, with lots of detail at the bottom, and as you go up the levels they become more general and inclusive – and generally more important to the person's sense of identity. Variations under noses, eyebrows, and hairstyles, and numerous other constructs will be subsumed under categories of 'appearance', which might then split into 'friendly/humorous' and 'to be avoided' - in the case of the man discussed earlier. These in turn might be subsumed under 'trust' or 'threat'.

Construct systems are motivational – they provide reasons for doing things, and they respond to the environment.

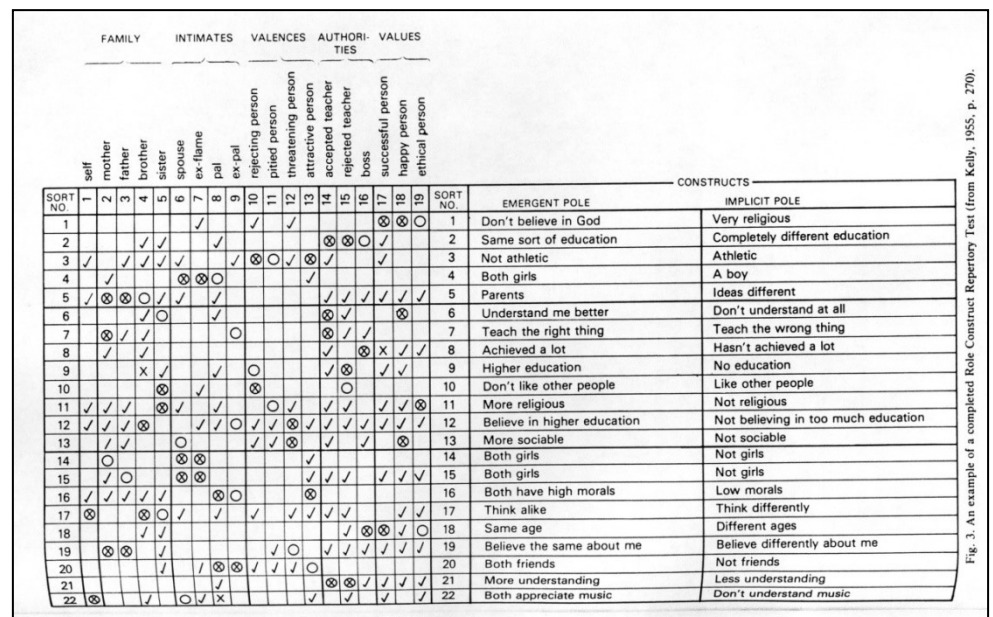
The process called Laddering is essentially going up the pyramid, from very basic distinctions about the world, to very meaningful distinctions. This explains its value as a research method, and why it needs great sensitivity – because you are dealing with a person's **core constructs**.

In PCP, the things constructs are applied to, are called **elements**. They can be people or roles, situations or products, types of packaging etc. The Repertory Grid or Kelly Grid (which comes in different varieties) uses comparisons between elements to elicit the constructs, and then requires some form of rating of each element. The grid then shows the patterns of interaction between them, rather like a cluster analysis.

A repertory grid is a user-generated rating scale. It is mentioned in this context because it includes one method for surfacing the constructs you work with in Laddering, but as you can see you can do a lot more with it. There are many types of grids and ways of factor analysing them (Kelly was a mathematician too). Read more here:

<http://www.centrepkp.co.uk/repgrids.htm>

An example of a completed Kelly Grid is shown below. The elements are at the top, the constructs on the side.



A simpler version shows how you can use it in UX research. Here is a comparison of a range of websites.

<http://www.uxmatters.com/mt/archives/2007/12/the-repertoire-grid-eliciting-user-experience-comparisons-in-the-customers-voice.php>

	Site 1	Site 2	Site 3	Site 4	Site 5	Site 6	Site 7	Site 8	Site 9	
Organized	7	7	9	7	3	3	1	4	4	Cluttered
Warm	8	8	6	7	3	3	2	2	2	Sterile
Colorful	7	6	4	5	9	3	1	2	2	Bland
For First Timers	8	8	7	8	9	5	1	2	2	For Experts
Lively	8	9	7	7	9	5	1	4	1	Dull
Small Number of Steps	4	5	6	9	1	1	1	2	1	Complex
Searchable	5	1	9	7	2	3	1	2	1	Not Searchable

The following gives more detail about the **basic postulates and Corollaries of Personal Construct Theory**:

Original	Interpretation
"A person's processes are psychologically 'channellised' by the ways in which they anticipate events".	Our expectations dictate our choice of action.
"A person anticipates events by construing their replications".	We approach the future by looking at repeated themes in past experiences and basing our actions on those previous events.
"A person's construct system varies as they successively construe the replication of events".	Our construct system is in a state of constant change based on our experiences.
"A person's construction system is composed of a finite number of dichotomous constructs"	The theory does not say that constructs are bi-polar, just that it is more useful to think of them as bi-polar. In making distinctions, the opposite is always implicit.
"People differ from each other in their construction of events".	We all see things differently.
"People choose for themselves that alternative in a dichotomised construct through which they anticipate the greater possibility for the elaboration of their system."	We choose that alternative which gives us the best chance of extending (and confirming) our construct system. (Confirmation Bias)
"To the extent that one person construes the construction process of another; they may play a role in a social process involving the other person".	If we understand where someone is coming from we can interact with them in a productive and meaningful manner.
"To the extent that one person employs a construction of experience which is similar to that employed by another, their processes are psychologically similar to of the other person".	People who share similar systems think alike
"A construct is convenient for the anticipation of a finite range of events only."	The construct of furniture may include antiques, office furniture and even street furniture, but is not useful in relation to dolphins or long walks.

People do not always use one or the other pole of a construct - they can be used in scalar mode. Hence we do not have a black and white world - there are many shades of grey.

Constructs are portable 'axes of reference'. What is *good* and what is *bad* may depend on where you are standing at the time. Some of the techniques were developed not by Kelly himself but by his followers.

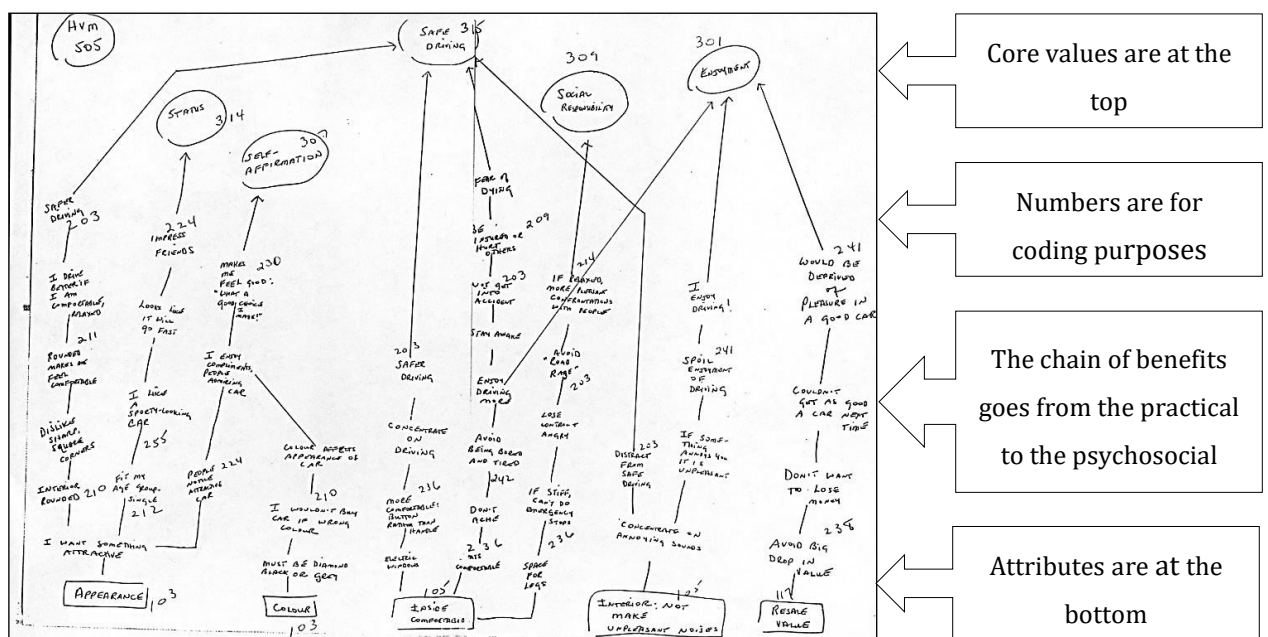
Definition and uses of Laddering

What is Laddering?

Devised by Hinkle, a follower of Kelly's, the process was designed to make explicit a person's superordinate personal constructs i.e. the key core values. <http://www.pcp-net.org/encyclopaedia/Laddering.html>. This powerful process was quickly adopted by QMR, substituting product attributes instead of constructs. Now it is defined as:

Eliciting links between the basic attributes of a product (or organisation), their higher benefits, and the core needs and values they meet.

You start with product attributes, and by asking 'why is that important to you?' move up to another level of benefits or consequences. Keep asking 'why?' to end up with the core motivations for buying the product. An example of a research ladder in progress is below:



It is often taught with Projective techniques, but it is not projective. It is done on an INDIVIDUAL basis; although ladders can be content analysed and combined. The numbers on the ladder above are for coding purposes.

Although you aim to complete a ladder right to the top, remember it's the journey, not the destination. Quite often the usable insights will be on the middle rungs.

When to use it - formally

1. Add power to your topic guides – be clear what to explore in the research

At the start of a project, as a pilot study, it will help you define the range of emotional and psychosocial benefits that the product or organisation offers in that context.

For example, if you were working on coffee, you could ladder up on characteristics such as *stimulating, black, with milk, finishes a meal, frothy, made from Arabica beans*, and so on, and discover why people feel a need to be more alert, look sophisticated, have some 'playtime', etc. Then include these issues in the research, giving you more insightful findings.

Or, looking at the membership benefits of an organisation, you would find out what the emotional benefits of the services were, and include discussion of those in the research.

2. Understanding inter-connected motivations for purchase or usage

It's not effective to ask respondents 'why did you buy that product?' They may not be aware of the process, there may be more than one reason and you will likely get a rationalisation as an answer. (Which can still be useful, but is not the whole answer).

It's much easier to start gently with all the positive attributes of the product, generating the ongoing benefits of each, and then have a discussion about the relative importance of those. Notice in the Laddering example that higher level benefits can cluster together, so two or three attributes can bring the same benefit.

3. Understanding how people discriminate between similar products and what is the importance of various features.

See the [Reagan-Mondale](#) example where the 'products' are political parties that share features such as 'improving education' and 'economic

Laddering often leads to the psychosocial: needs and motivations that have a social context

recovery.’ Note that the paper goes on to show the application to advertising development and communication.

See also the [Nissan Infiniti](#) example where new features for a range of cars were screened both for importance to consumers and resonance with Nissan Infiniti brand values.

4. Segment consumers in terms of the meanings they give to product attributes e.g. performance in a car means different things to different groups of people. Also why [FedEx package tracking](#) brings different benefits to admin staff and business executives.

5. Use in strategy development and finding leverage points in advertising and communication.

Populus, who were responsible for the Reagan-Mondale research, have developed the Means End Chain model into an application for designing communication strategies.

6. Use as a thinking tool in analysis to help discover the implications of your findings.

Analysis and Interpretation is about discovering the meaning and significance of things. Sometimes asking ‘why is that important to respondents’ can help you connect up the themes.

Laddering is not so good for directly comparing differences between brands. This is because brand values typically work across all the levels of a hierarchy. Some brand values will be about the immediate emotional benefits, others will be about belonging to certain aspirational user groups, or even at the identity level. However, see [Reagan-Mondale](#), which uses political parties rather than brands. It discriminates between the two by showing which party owns which of the higher level attributes.

When to use it - informally

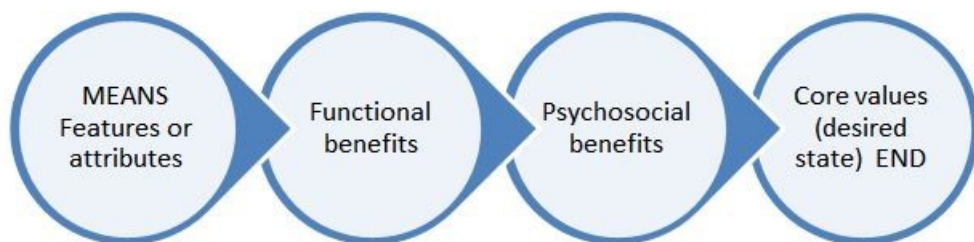
It makes a very effective and powerful probing tool in almost any situation. Just ask a version of 'why is that important to you' twice in a row, and you will be taken into the more important emotional reasons for needing a feature or an attribute.

The Means-End Chain or Means End Analysis

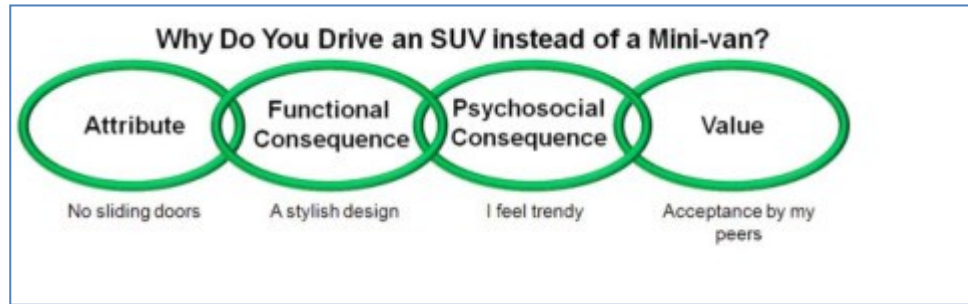
Since so many examples in the literature refer to Means-End, it is worth understanding this marketing friendly version. It uses the process of Laddering, but is more specific about the higher levels. Jonathan Gutman is credited with the main work on it, and you can read a key paper on the Association of Consumer Research website.¹

Means are objects (products) or activities in which people engage (running, reading). Ends are valued states of being such as happiness, security, and accomplishment. A means-end chain is a model that seeks to explain how a product or service selection facilitates the achievement of desired end states.

Although means-end chain models are often presented sideways, the principle is the same, and the Laddering process is the same. However there is a greater variety of methods to analyse the data.



¹ [A Means-End Model For Facilitating Analyses of Product Markets Based on Consumer Judgement](#)

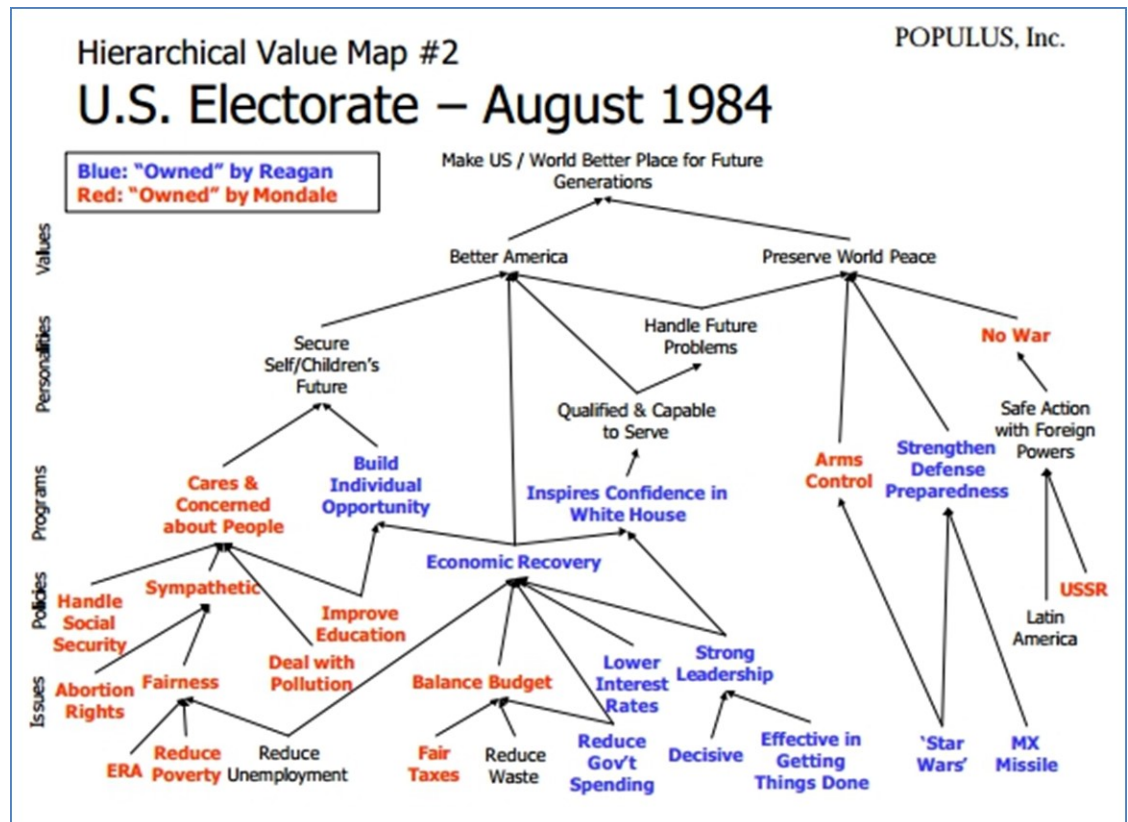


The example above, and a case study about online channel adoption can be seen in this [Rockbridge white paper](#).

Examples of Laddering in Practice

Example 1 The Reagan Mondale Presidential Election 1984²

The business objective was to promote Ronald Reagan's policies for the 1984 US Presidential election. (He won by a landslide but some months earlier it was a very close run race). Using a range of techniques, including groups and Laddering interviews, Populus built voters value maps, analysed which candidate 'owned' which territory. See below; all the blue items were felt to belong to Reagan; the red to Mondale.



² http://www.populus.com/files/Laddering_MECCAS_Reagan_1.pdf

They then recommended how to leverage those issues in the most effective way. Look along the bottom line of issues and you will see:

Reducing unemployment

The more credible way for Reagan to talk about the benefits of reducing unemployment was in the context of *economic recovery*. Mondale would be more credible when he talked about the benefits of this same issue in a social context.

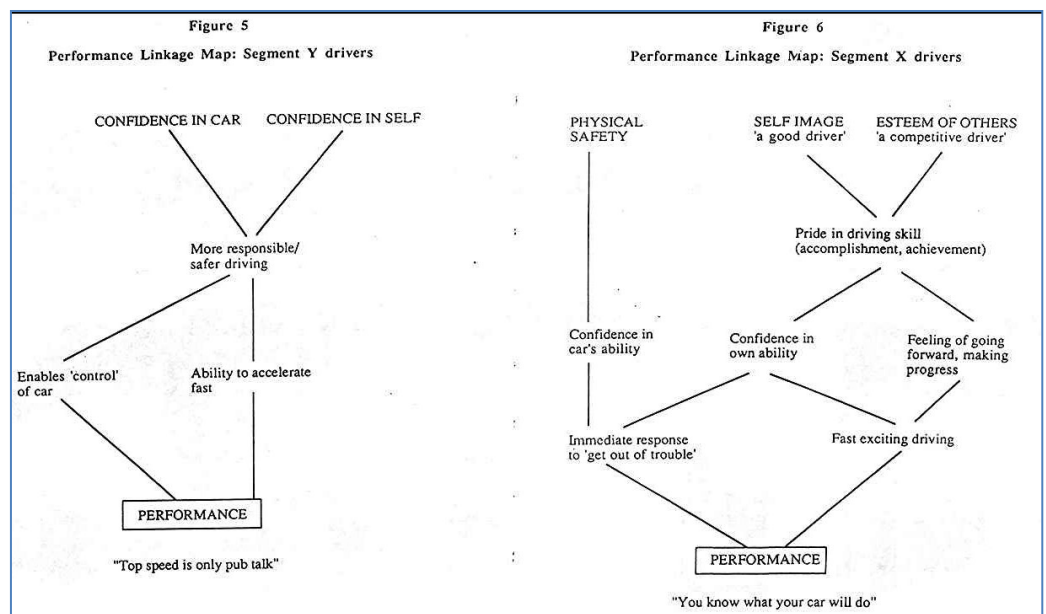
'Star Wars'

refers not to the movie series, but a proposed missile defence system. The value map showed that Reagan should talk about it in the context of defense preparedness, while Mondale could use the context of arms control.

This suggests that the motivating leverages to win votes are above the level of specific issues.

Example 2 – What does performance mean to different segments of drivers? ³

Notice how the one construct of 'performance' leads to different core constructs; for one segment it's all about confidence; for another its self-esteem and the esteem of others.



³ Image Management' - the Use of the Laddering Technique in Understanding & Developing Product Images by Jeanne Steward, QED.

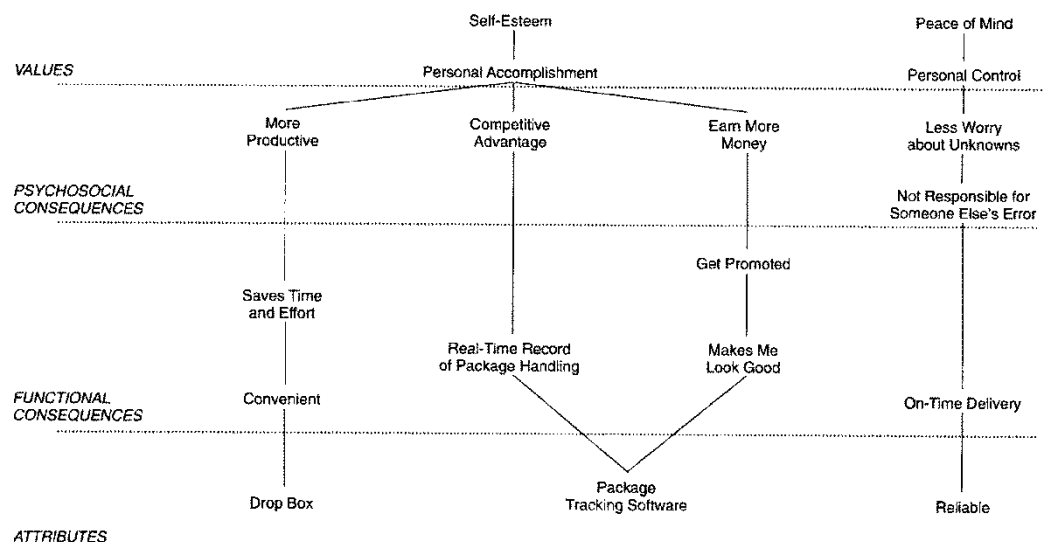
Example 3 FedEx: How the same product benefit has different values depending on context. ⁴

The value map is below. In the bottom middle, you can see 'package tracking software'. Follow the paths upward. For administrative staff, working in an open plan office where everyone can see their successes and failures, an important benefit is making them look good to others. But the business executive segment is competitive, wants to win and get a competitive advantage. So although they both end up with Personal Accomplishment, the routes are different. FedEx used this knowledge to create different advertising campaigns for each segment.

For the admin staff they demonstrated how use of the tracking software enabled an admin worker to stand up to a manager – and receive applause from the rest of the room. While for the business executives, the advertising showed high level decision makers winning a negotiation as a result of knowing the package had arrived and who had signed for it.

Figure 2

Consumer Decision-Making Map: Express Mail Delivery



Adapted from Reynolds and Craddock (1988).

⁴ From: *Understanding Consumer Decision Making: The Means-end Approach to Marketing and Advertising Strategy*, by Thomas J. Reynolds Jerry C. Olson, 2001

Example 4 Nissan Infiniti Advanced Planning 2009⁵

Infiniti used Laddering to better understand how a host of new technologies met, or didn't meet, car buyer's unstated psychological motivations and how the technologies supported the Infiniti brand.

Ladder Example

Feature Code: _____ AVP - Around View Monitor


Level 1 Benefit: _____ Video cameras make blind spots more visible

Level 2: _____ Won't back into something

Level 3: _____ Won't destroy something

Level 4: _____ Damage to car is stressful

Level 5 Core Value: _____ Peace of Mind



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Having discovered the core values that each feature led to, they compared these with the 'three pillars' of the Infiniti brand.

The Process of Laddering – how to do it

Timing and Preparation

It takes at least half an hour, if you have your constructs or descriptors ready. A detailed Laddering can take up a whole depth interview, which could be an hour long.

While it works best face to face, indeed sitting side by side, there are examples where it has been done by phone and online. See:

<http://rockresearch.com/understanding-consumer-decision-making-with-means-end-research/>

⁵ www.qrca.org/associations/6379/files/ZwillingerandNguyen.pps and here

http://www.quirks.com/pdf/200910_quirks.pdf

There may be considerable investment in coding and analysis if you are using it for segmentation and if you plan to use software for analysis get the software first – it may require special ways to input the data. However a small number of laddering interviews at an early stage can be analysed by using human brain only.

How to do a Laddering interview

*Watch the demonstration videos
on [YouTube](#)*

1. Don't forget the introductions and the warm up. You can use the warm up to elicit, or add to the descriptors/ features/ attributes you will ladder with.
2. Be sure to warn them that Laddering involves repetitive questioning – but that they will find the process interesting.



Sit side by side with the respondent and build up the ladder together.

3. You need to start by eliciting a number of descriptors/attributes relevant to your product category. There are various techniques for doing this (mapping, Kelly Grid, and simple open-ended questioning) or you may already have the descriptors, e.g. a list of features in a car. (See Appendix)
4. You should work with the ones that have most meaning or relevance to the respondent. Ask the respondent to prioritise them, and aim to work with the top ten or so.
5. When you start, it's much easier to use positive descriptors*. You need to be clear that the list you have are things respondents would want, because you will be asking 'why is that important to you?' NB. If you are working with product features it is common to assume the feature is the preferred pole – for example air bags are preferred to no air bags. But if there is

any doubt you should check: which do you prefer: hard suspension, soft suspension, adjustable suspension?

6. *It is possible to do negative Laddering but only once you are really familiar with the technique. And not at the start.
7. Write the descriptors or features across the bottom of a large sheet of paper. Go through them in turn, asking variations on the key question that is: WHY is that important to you? Why does it matter? Why do you prefer that? Why is it important?
8. Write in the answer above the feature in pencil, and then ask about that one in turn. If you get two answers, put them both in and ladder up from both next time.
9. And then keep going until you join with another ladder, come to a dead end, or come to something really obvious. Creating the ladder jointly with the respondent helps keep them motivated – but it is possible to just record the interview and draw the ladder later.

EXAMPLE – from dry dog food to an identity level construct

Why do you prefer to give your dog dry food?

“I think it is better for their teeth.”

Why do you want to give him something that is better for the teeth?

“I think the dog will be healthier”

Why does it matter to you that the dog will be healthier?

“Because I would feel guilty if he got bad teeth and there was something I could have done about it.”

Why is it important that you shouldn't feel guilty?

“Because I would like to think of myself as the sort of person who loves animals, and I certainly love my dog.”

Hints and tips

- It is very repetitive. Constant use of the word why turns an interview into an interrogation, especially when you have to ladder up from a number of constructs. So find ways of softening the question or use alternatives:

"I'd like to understand why....."

"What are the benefits as you see them....."

"What about that is important to you....."

- Respondents sometimes give an answer that is on the same level – you have to change the question to move up a level.

"Why do you want to give him something that is better for the teeth?"

"Apparently the crunching action of dry food somehow cleans teeth."

Ask: "So why is it important they should have cleaner teeth?"

- An answer phrased in the negative should be reframed into the positive before continuing:

"You don't want a dog with bad teeth."

"Do you mean you prefer to have a dog with good teeth? Why is that important to you?"

- You will find that respondents will not always answer the question directly; they may answer another point altogether, or give a number of reasons all in the same sentence

"The dog will be healthier and I will save money at the vet."

Where there are two reasons you can split the path and ask about both separately:

"Why is it important for your dog to be healthier?"

"What are the benefits of your saving money at the vet?"

To deal with issues like this it's useful to hand draw the ladder in outline as you develop it with the respondent.

- Respondents become annoyed because the procedure is repetitive and many of the answers are to them "obvious".

"Why is it important that your family should not die in a car crash?"

The procedure can be intrusive and respondents become defensive. There are cases where it does not respect respondents' emotional well-being to continue on with distressing themes.

However such upset can arise as a result of even innocent looking constructs. The very nature of the procedure is to move towards the centre of the respondent's psyche, wherein are not only the core values, but also the deepest fears and insecurities. Stop the questioning if there are signs the respondent is uncomfortable or upset.

Be aware that some respondents will use defence mechanisms to avoid uncomfortable questions, often saying something socially acceptable or moving it to an area which is not so upsetting for them. Your intuition will tell you something odd just happened. Stop Laddering when you feel you have reached something of real significance. If you go too far, it can become meaningless.



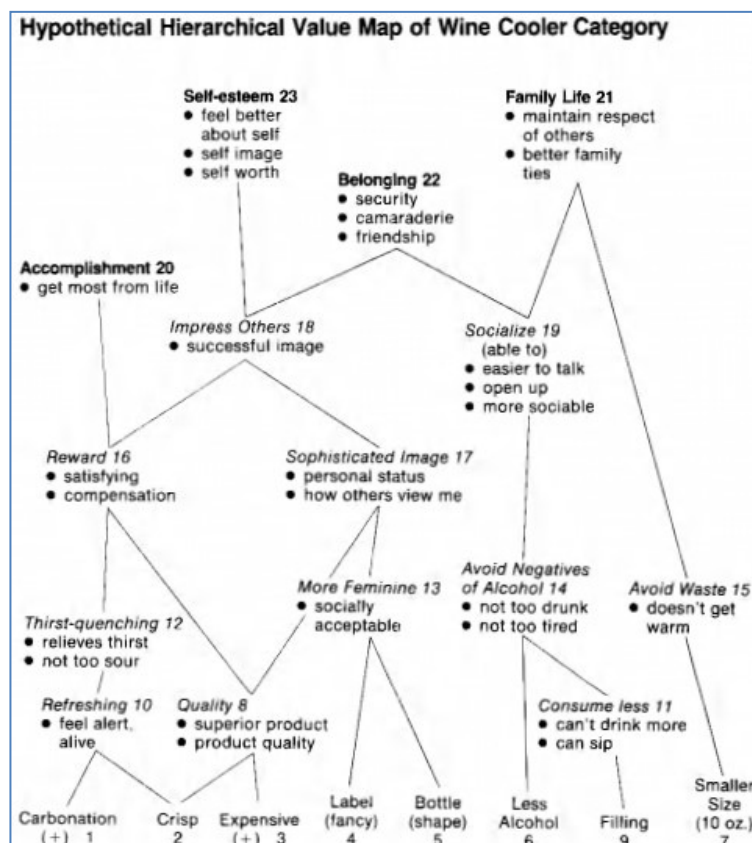
How to Analyse Laddering

If you are doing it with a few individuals, you can analyse the ladders by hand-coding, and scanning for patterns. Look for the nature and number of linkages from the base features and the levels above them. You will be able to see rich possibilities as soon as you have completed the first few.

In many QMR projects, a handful of laddering interviews is enough to show the range of potential emotional benefits. These then go into the topic guide, or into stimulus material for further exploration.

The objectives guide which ones you choose to focus on. Maybe a competitor already emphasises one, but you need to differentiate. Maybe you want to get to the same goal, but take a different route.

If you want to do a more extensive analysis, you will create a Hierarchical Value Map. (HVM). This can be hand drawn, created through using software, or calculated from an Implication Matrix (which is a version of a Kelly Grid)



In this example, you can see the attributes at the bottom – carbonation, crisp, expensive etc.

In the middle are the consequences and at the top the core values.

To make the coding manageable, some of the detailed responses are subsumed under one code. E.g. 'Avoid negatives of alcohol' includes 'not too tired', 'not too drunk', 'don't say dumb things' and so on.

Once the master codes are analysed, numbers are given to each code and are used to rate each element in each ladder.

This is a complex process but can be followed in more detail in the Reynolds and Gutman article

[Reynolds and Gutman Laddering Theory, Method, Analysis and Interpretation](#)

Table 2
Summary Implication Matrix*

	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
1 Carbonation	1.00		10.00		4.06			.01	.14		.04		.06			.04	1
2 Crisp	3.00		4.00		.04				.04	.03	.04	.01			.07		2
3 Expensive	12.00								2.04	1.01	1.09		1.06		.05	.05	3
4 Label	2.00				2.02				2.04	.02		.01			.02	.03	4
5 Bottle shape	1.00		1.00		2.02				1.03						.02	.03	5
6 Less alcohol			1.00		1.00		5.00		.01		.01	1.01		.04	.01		6
7 Smaller				1.00		.01	3.00				.01		.02	.01			7
8 Quality					3.00		1.00	4.00	4.03	4.04	.01	3.02		.09	.04		8
9 Filling			4.00			.04						1.03		.03	.02		9
10 Refreshing					10.00	1.00		5.10	.01	.06		.04		.05	.02		10
11 Consume less							5.00				.04		.02	.03			11
12 Thirst-quenching								14.00		.08		.06		.04	.04		12
13 More feminine									7.00	.02				1.03	.04		13
14 Avoid negative										1.00	5.00		4.01	.04			14
15 Avoid waste													2.00				15
16 Reward										11.00		8.00		.06	1.05		16
17 Sophisticated										4.00	1.00	1.00		4.02	5.03		17
18 Impress												1.00		10.00	9.00		18
19 Socialize													3.00	5.00			19
20 Accomplishment																	20
21 Family																	21
22 Belonging																	22
23 Self-esteem																	23

* No relations exist between the attribute elements.

You can see an example of the summary implication grid at left.

Having looked at that paper, you might realise why Laddering software would be a good idea.

There used to be several versions for PCP researchers – none of them very user-friendly by today's standards.

But Means End Chain researchers have developed MECAnalyst for this

purpose. It helps with coding, construction of implication grids and HVMs and is said to be integrated with Windows programs.

<http://skymax-dg.com/mecanalyst/meceng.html>

Laddering as a Thinking Process

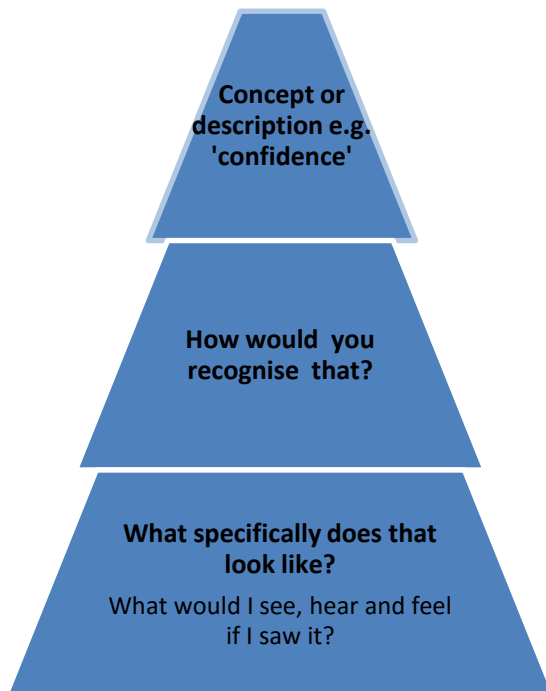
The principles of Laddering can be used by a group in a meeting or workshop when looking for strategies or positionings for a product. You start by listing all the descriptors and benefits of the product, and make an assessment of which ones might be most important to the consumer.

Taking these, on a flipchart, you ladder up from each one, with the group choosing the most likely responses to the question “Why is that important?” You will use your knowledge of the market, your interviews and intuition to create the value map. As the ladders evolve, they will indicate different positionings and strategic directions for the product, which can be explored in research.

Pyramiding

Although basic, this is an under-used technique in interviewing. It is a form of clarification, but the typical 'what do you mean by.....?' clarification probe tends to give answers on the same level of the hierarchy.

For example, one of the typical higher level benefits of many personal care products is confidence. Wearing deodorant, having clean hair, groomed fingernails – all of these give confidence. As does seeing https on an internet address, a guarantee, new tyres – this one concept of confidence covers everything. Which means it's harder to make specific recommendations to the client about communicating confidence.



Pyramiding allows you to get more specific about the types of confidence and their manifestations.

Q: "Let's think about the kind of confidence you get from having clean shiny hair. How would you recognize that in yourself?" (Or 'how would you know you had it?')

A: "Well, I would feel happier because I wouldn't have to worry about covering it up. I would be more sociable."

Q: "Thinking about the kind of happiness you get from not having to cover up your hair. What specifically does that look like? What would I see, hear or feel if I saw you with that happiness?"

A: "You would see me walk with a little bounce, maybe move my head so my hair swished around a bit. I would look more relaxed, not hunched up, trying to hide."

Q: "And being more sociable? How would I be able to see or hear that you were being more sociable?"

A: "Eye contact, I would look people in the eye. Speak to them sooner; I might look a bit more bold in what I said and how I said it. I would be a bit louder; probably laugh more too."

The 5 Whys – getting to the root cause

Where is it from and what does it do?

This technique is believed to have originated from the Analyze phase of the Six Sigma DMAIC (Define, Measure, Analyze, Improve, Control) methodology.

Unlike the other techniques, its main usage is in problem solving rather than consumer understanding. In common with the others, it does rely on repeatedly asking a question – and it is not as easy as it looks.

The benefit of the technique is that you can identify the actual source of the problem and apply resources correctly to solve it. With the 5 Whys you do not stop too soon and deal with only the symptoms. It also works particularly well when the problem involves human interactions. One of the drawbacks is that it can be seen as a way of allocating blame, and so it requires careful management. Another one is that it's not always easy to frame the right questions or prioritise the right answers. It may not be completed in one session as you may have to get more information at various stages.

You are more likely to be using this as a thinking tool, with an internal team.

How to use it

1. Write down the specific problem and get the team to agree on your formulation of it.
2. Brainstorm some reasons why the problem might occur, and write down the most likely answer.
3. Ask why that reason occurs, write down the answer and ask why again
4. It may take more or fewer than 5 whys.

Managing Blame

Blame in various forms is the biggest issue that occurs with this process, especially if any of the participants have to protect their self-image by blaming others. It helps to point out at the start that you are looking for a chain of causality, that 5 Whys often highlights a number of interpersonal relationships and it is not useful to say "That is so and so's fault." Instead you say "So and so is meant to do that, but it does not happen. Why is that?"

Example 1 NHS⁶

The patient was late in theatre, it caused a delay. **Why?**

There was a long wait for a trolley. **Why?**

A replacement trolley had to be found. **Why?**

The original trolley's safety rail was worn and had eventually broken. **Why?**

It had not been regularly checked for wear. **Why?**

The root cause - there is no equipment maintenance schedule. Setting up a proper maintenance schedule helps ensure that patients should never again be late due to faulty equipment. This reduces delays and improves flow. If you simply repair the trolley or do a one-off safety rail check, the problem may happen again sometime in the future.

Example 2: iSix Sigma⁷

The company is getting too many complaints from customers **WHY?**

The product arrives inadequately wrapped and is damaged in transit **WHY?**

The wrapping tears too easily **WHY?**

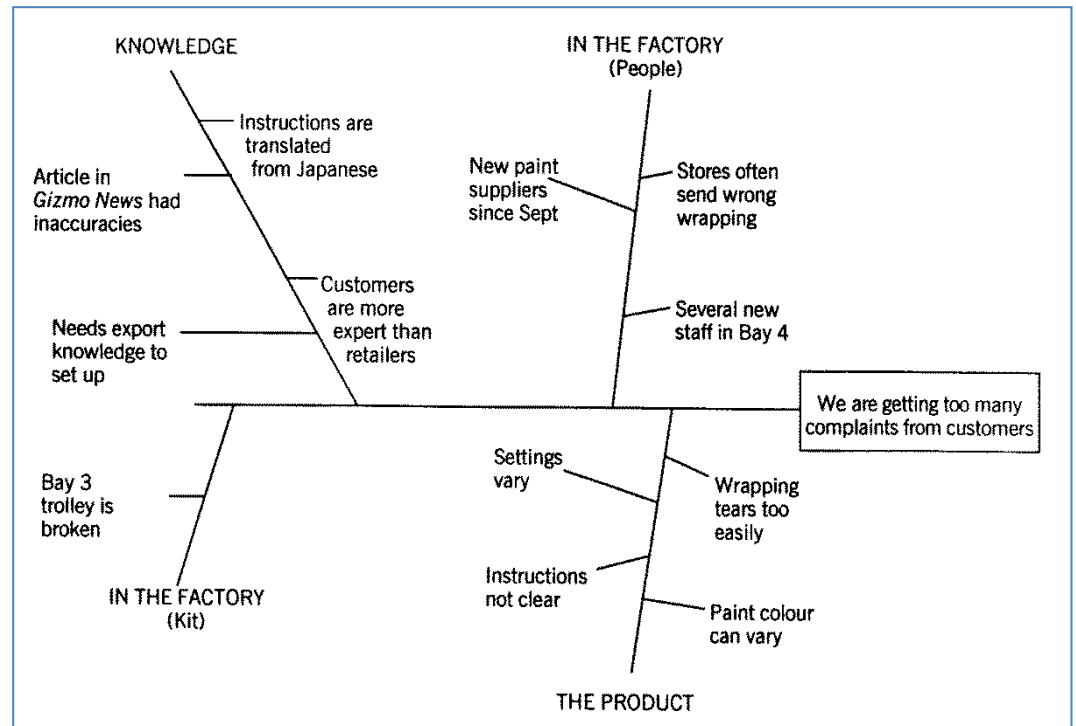
Stores supply the wrong wrapping **WHY?**

Because the new staff in Bay 4 don't know any different and don't feed back to them **WHY?**

⁶ [NHS Service Improvement Tools](#)

⁷ <https://www.isixsigma.com/tools-templates/cause-effect/determine-root-cause-5-whys/>

Because their training does not cover the importance of correct wrapping materials.



TIPS

1. Keep going until you are sure you have got into the deep cause.
2. Don't try to fix anything too soon.
3. Use a cause and effect or fishbone diagram if things are getting complicated. The main problem is in the head of the 'fish' and each subsequent Why takes you down into the more detailed 'bones'. See above.

How to run the Exercises

Laddering or Means End Chain Exercise

1. Have people in pairs, A and B, sitting next to each other. They will need pencils or pens and blank sheets of A4 or A3.
2. Choose a subject relevant to them and together come up with the attributes or features to ladder on. Make sure they are all phrased in the positive and have the delegates write them at the bottom of the paper. Use 5-10 attributes.
3. All the As now conduct a Laddering interview, with Bs as respondents. Watch as they do it as some will get stuck when they receive negative answers or answers at the wrong level.
4. When it's done review how the As found it.
5. Ask the Bs what it was like to be a Laddering respondent – that will help focus on the need for sensitivity.
6. Ideally repeat the process for the Bs, on a different subject. Go through the hints and tips charts.

Pyramiding Exercise

1. You can demonstrate this to a group exercise, or get people to try it on each other in pairs. Start with the example on the chart.
2. Find a common fat word that arises in the work they do: Convenience, Trust, Sociability.....politicians' speeches are full of them: Equality, Free Speech. Hard-working Households..... It helps to assume the fat word is being used in a specific context.
3. Ask questions, (or get the delegates to), that will break down that fat word into things that are sensory specific – how would I be able to see, hear or feel that you had Trust in the context of say, railway operators, or sunscreen or a pancake mix.

5 Whys Exercise

This is best done as a group exercise and you can lead it. Mention the issue of not blaming others and come down hard on any examples of blame in the group.

Identify a practical problem that all of the group can relate to and will know something about. This will help you complete the exercise.

Write the problem at the top of a flipchart and then aim to write all the answers in sequence below. Ideally you will end up with something like



the example. In practice you may find yourself with a number of reasons at some stages (prioritise) and or lacking some information. You can always write in the action you would take to find the information if you don't have it. Your demonstration will not be quite complete but all the principles will have been shown.

APPENDIX: Elicitation of Constructs for Laddering

1. Using Elements to elicit constructs

Elements are chosen to represent the area in which the construct system is to be investigated. They can be people or roles, situations or products, types of packaging etc. Ideally there should be a very wide selection, and should include challenging aspects (people or things which are disliked, are difficult to deal with, stresses, disappointments, tough relationships, failures etc.).

You can ask the respondent to fill in the details of these aspects.

The more relevant elements you have the easier and richer the construct elicitation will be. Once you have them, you use them to draw out the constructs by contrasting and comparing. The classic technique is to use **triads** (***In what way are two of these the same and different from the third?***), but in practice it is possible to make comparisons between **dyads**, to use a **mapping** technique as a starting point, or even simply to ask

What are the similarities and differences between these products/people /situations as you see them?

2. Self-characterisation

If you want constructs related to how a person describes themselves, you can start by using triads, using the person and two significant others as key elements. Another way is to ask the person to write a self-characterisation, which can give additional insights. This is written by the respondent in the third person, and the request is structured to be non-threatening. Procedure:

*"I want you to write a character sketch of (insert respondent's name), as if he or she were the principal character in a book or play. Write it as if it was written by a friend who knew him/her **intimately** and*

sympathetically, perhaps better than anyone else could ever know him/her. Make sure you write in the third person, for example start by saying

'Joanna Chrzanowska is.....''

The above will produce a general self-characterisation, but often you will want to look at a specific aspect. You may be interested in constructs to do with being a mother, so the instruction would include

"I want you to write a character sketch of (insert respondent's name) as if he or she were the main character in a book, who was a mother of two children...."

The person who writes the self-characterisation must be prepared to share it with the interviewer, and between them they have to pull out a list of constructs (descriptors, definitions, differences used to categorise the world) from the writing AND discover the opposite pole to each construct.

3. Open-ended interviewing

If you wanted constructs to do with being a researcher, you could try:

"Tell me about being a qualitative researcher; what is like for you? What sort of people do you work with? What do you enjoy and what do you dislike about it? What would you like to achieve? Etc.

While listening, note down any descriptors used by the respondent and then at the end check with them whether these are valid constructs for them. For example,

"You said some of the people you met in research were a bit 'flaky'. Is flaky a description you could apply to more than one person or situation in qualitative research? And what would you say was the opposite of flaky for you?"

4. 'Hypothetical Questions'

Sometimes asking for comparisons doesn't give you a wide enough range of constructs. You can release the respondents thinking by giving them more challenging questions, like

"If money was no object, what sort of ready meals would you buy?"

"What would the most amazing shampoo in the world do for you?"

"What would it mean to you if you were not allowed to use toilet cleaner ever again?"

5. Using Supplied Constructs

Where you have a lot of background knowledge of a product area, and/or you are planning to do several interviews and analyse them together, it simplifies matters if you supply the constructs to the respondent. You will lose out on some individuality of expression, and you should always check that your respondent understands the supplied constructs; otherwise your ladder will be meaningless. Work with the constructs the respondent says are most relevant to them.

In effect you are making the assumption that product features are constructs, which is valid enough as long as there is plenty of evidence that people do discriminate between cars on the basis of features. For example, if you are working in the car market, you could say:

"Here is a list of things which people have told us are important when they are choosing a car.

Air bags, fuel economy, performance, after sales service, colour, comfortable interior, cup holders, price, low depreciation ...

Which would you say are most important to you?

And what does 'after sales service' mean specifically to you?"

Once you have identified the meanings of the most important features you can start the Laddering process.

The most useful theory for Interpretation: Maslow's Hierarchy

Why is Maslow so significant?

- Abraham Maslow synthesised a large body of research relating to human motivation, removing a lot of confusion about the value of previous theories
- The basic theory is so robust that it has been developed over time and has increased its explanatory power
- Maslow was a humanistic psychologist and his approach resonates with current thinking about marketing and advertising
- Maslow's theories have broad applications in marketing and management
- Because Maslow's theories are a synthesis of other psychologies, they interrelate well with other models of mind, body and spirit
- The theory can be applied **to people, products, brands and organisations**

Description of the levels

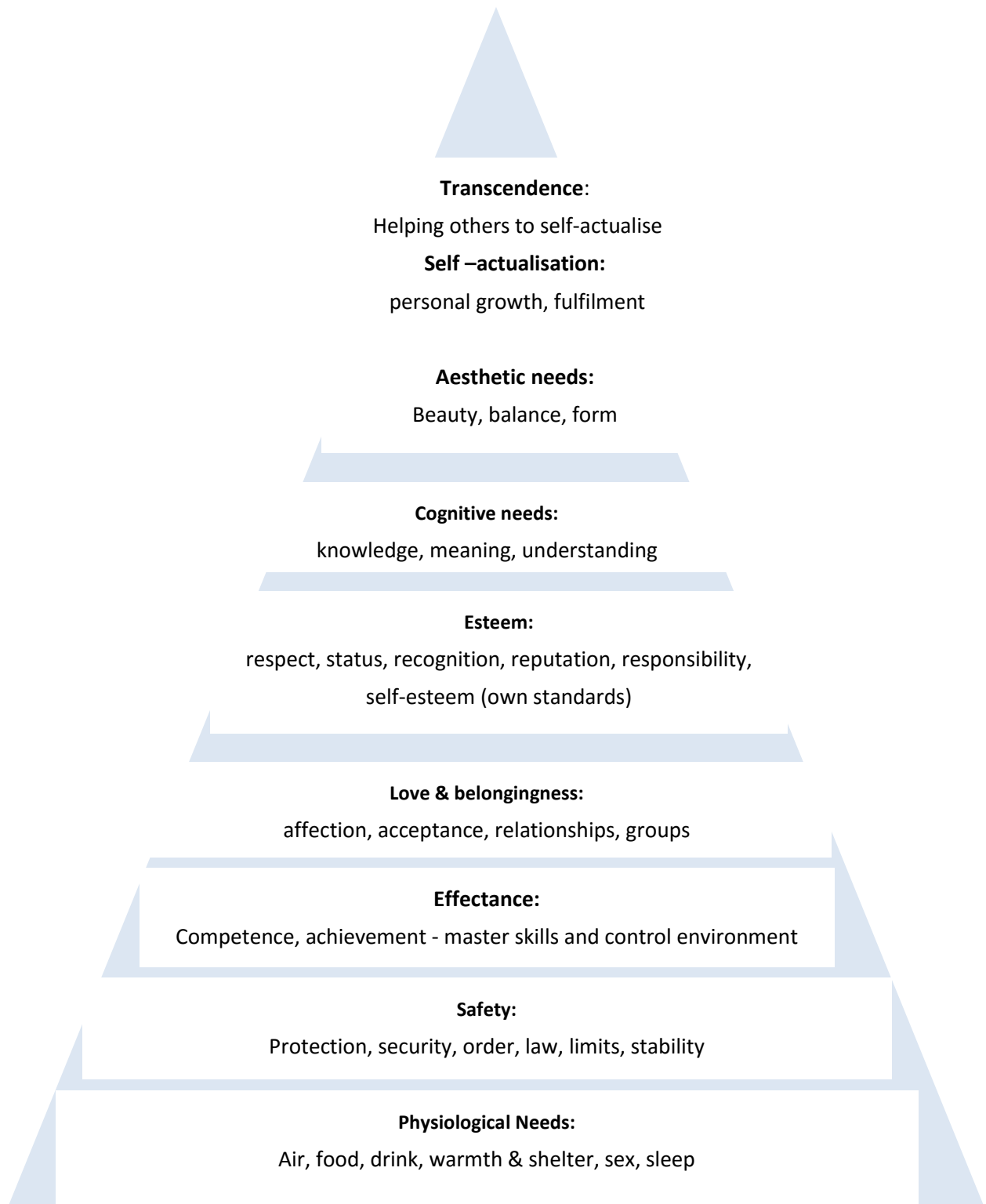
Biological/ Physiological - these include the need for food, water, and other vital components of life. If these needs are not met, the organism can't survive.

Safety and security. Humans tend to seek out order and have a desire to live in a world that is not filled with chaos and danger. As a result, they avoid threat, and seek out stable lives with careers, homes, insurance, etc.

Effectance – the ability to be competent, to master the relevant skills to live well and control the environment. A need for mastery persists throughout life, whether in physical, social or intellectual spheres.

Belongingness and love. Belonging to stable social groups also brings security, and enables a focus on personal development. With stability,

people seek out love and affection from family, friends, and others in their community.



Esteem. This includes both self-esteem and esteem from others which may be based on achievements, recognition from others, in personal and professional spheres.

Cognitive: to know, to understand, and explore ourselves and the environment – to search for meaning in life. Needs at this level are based on acquiring knowledge and understanding of the world, people, behaviour, etc.

Aesthetic: symmetry, order, and beauty. People need to find and enjoy beauty in life and in their environment.

Self-actualisation is the need to fulfil one's own potential. As Maslow stated, "What a man can be, he must be." It was originally the highest need, but Maslow later added:

Transcendence: to help others find self-fulfilment and realize their potential.

Deficiency and Abundance needs

On each level people can go to extremes.

On the physiological level, people may seek an abundance of food, or sex. If they feel too safe, they may seek out danger through extreme sports, for example. The need to belong may result in excessive rule following; the need for esteem in self-aggrandisement.

Cognitive and aesthetic needs engender all sorts of experts, while some people attempt self-knowledge and actualisation through drink or drugs.

Applying Maslow to Brands and Organisations

Maslow's level	Description /Issues	Relevance to a brand
Self Actualising	Self-fulfilment, live by one's own values and realize one's potential	Authenticity – does the brand walk its talk? Are the brand values integral to the company or are they just bolted on? Does the brand have a distinctive and unique personality, or is it just a stereotype?
Aesthetic	Symmetry, order, beauty	What does the brand do to stimulate and please the senses?
Cognitive	Know, understand, explore ourselves and the meaning/ relevance of issues in our life	How does the brand contribute to the person's perception and understanding of himself / the environment
Esteem and status	To achieve, be competent, gain approval and recognition, (inc. professional and financial success) to feel worthwhile, wanted and valued. Both self-esteem & esteem from others.	How does the brand make the user feel good in their own eyes, and look good in the eye of others? How does it make them feel competent and/or in control?
Belongingness	Affiliate, belong to appropriate social groups, to be accepted and needed, to matter to others, not to be insignificant	What consumer market sector does the brand operate in? Is there a 'community of users' with shared values? How does the brand make the consumer feel valued?
Safety & security	Protection against immediate and long term threats to individual & community, sense of power & lack of vulnerability	What tone of voice does the brand adopt? Is it paternalistic or dangerous? How comfortable and safe do users feel? How much do they trust the brand?
Physiological – basic needs	Food, drink, sex, warmth, shelter	Functional attributes of the brand – how well does it fulfil specific needs? What are its competitive strengths and weaknesses?

Reading List and Further Information

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