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Decision-based voter segmentation: an application for campaign message development

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Abstract

Purpose – The purpose of this study was to demonstrate how the segmentation of voters based on decision-making processes, using means-end laddering research innovations and real-time interactive online interviewing, can aid in the formation of political communications strategy, including theme and message development.

Design/methodology/approach – To demonstrate the application of these innovations in a political context, the paper uses data from a sample of 114 voters who were interviewed during the 2004 US presidential election campaign. The paper draws on three recent innovations to the means-end laddering methodology: elicitation questioning techniques that allow for a decision equity analysis between targeted groups; decision segmentation analysis; and real-time interactive online interviewing; and applies them to an electoral context. It provides an interpretation of the identified decision segments and an exposition of how these common networks of meaning can serve as the basis for targeted theme and message development.

Findings – These three innovations, in concert, were found to provide an efficient set of methods to serve as the foundation for the campaign message development process.

Originality/value – This paper provides deterministic research techniques for campaign strategists who want to understand voter decision making and demonstrates a combination of methodological and technological innovations that addresses the time, cost, and geographic limitations often associated with conducting voter decision making research.

Keywords Politics, Communication management, Elections, Decision making, Market segmentation, United States of America

Paper type Research paper

Introduction

Although there is ongoing discussion in the literature regarding how political marketing differs from traditional marketing, there seems to be consensus that, at their core, both traditional and political marketing share the fundamental concept of exchange (Egan, 1999; Henneberg, 2004, 2008; Henneberg and O'Shaughnessy, 2007; Lock and Harris, 1996; Newman, 1999; O'Cass, 1996, 2001; Wring, 1997). Whereas traditional marketing seeks to facilitate exchanges that satisfy the needs, wants, and values of consumers and other exchange partners (Houston, 1986; Woodruff, 1997), political marketing seeks to facilitate exchanges that satisfy the needs, wants, and values of its own exchange



partners, namely voters and/or other political constituencies (Butler and Collins, 1994; Henneberg, 2004, 2006, 2008; Henneberg and O'Shaughnessy, 2007; Huber and Herrmann, 1999; Kotler and Kotler, 1999; Lees-Marshment, 2001; Lock and Harris, 1996; Newman, 1999; Newman and Sheth, 1987; O'Cass, 1996, 2001; Reid, 1988). Within an electoral context, this exchange-based marketing orientation posits that tailoring one's political "product" (e.g. party, candidate, initiative) to satisfy the needs, wants, and values of voters' yields a higher probability of voter satisfaction and success in the election (Newman and Sheth, 1987; O'Cass, 1996). Support for this political marketing orientation is offered by Scammel (1995, 1999) whose research in the UK suggests that, between 1979 and 1997, the greater the marketing orientation of the party, the more successful that party was in the general elections.

A key task of a marketing oriented election campaign, therefore, involves obtaining market intelligence to provide an understanding of the needs, wants, and values of voters (Lees-Marshment, 2001). This information is then used to develop communication strategies that effectively position the political product (in relation to the competition) within the minds of targeted groups of voters so as to affect the voters' decision-making process and choice (Huber and Herrmann, 1999; Newman, 1994, 1999; Nimmo, 1970; Reynolds and Whitlark, 1995). Thus, market intelligence not only should identify what attributes (e.g. issues, positions, traits) are important to each segment of voters, but also should provide an understanding of why these attributes are important.

Marketing scholars have long believed that distinguishing attributes derive their importance because they satisfy some higher-level personal value, and that it is these personal values that drive both consumer and voter decision making (Gutman, 1982; Huber and Herrmann, 1999; Newman and Sheth, 1987; Parry, 2002; Reynolds and Olson, 2001; Sheth *et al.*, 1991; Woodruff, 1997). Personal values can be defined as goals or end-states of existence that people strive for in their lives (Rokeach, 1973). This values-based model of voter decision making is grounded in means-end theory (Gutman, 1982), and posits that personal values, such as "satisfaction/well-being" or "safety" (Rokeach, 1973), serve as the connective tissue that links the salient issues, positions, and traits of an election to each individual voter (Bagozzi and Dabholkar, 2000; Bahner and Fiedler, 1985; Huber and Herrmann, 1999; Norton, 1987; Sheth *et al.*, 1991; Wirthlin, 2004, p. 142). This critical role of values – as the driving force behind choice behaviour – leads to the operational question of how these policy issues, positions, and traits can be linked to higher-level concerns.

To develop effective political communications, then, requires the determination of what are the most important issues, positions, and traits, and the corresponding value orientations to which these issues, positions, and traits can be connected (Huber and Herrmann, 1999; Reynolds and Whitlark, 1995). An understanding of these connections provides campaign strategists with a framework for positioning the political product through communications that effectively influence and persuade voters. The foundation of this values-based approach to message development was pioneered during Ronald Reagan's re-election campaign in the 1984 US presidential election (Wirthlin, 2004, p. 142). In addition, this approach has also been used in the USA by Republican congressional and gubernatorial candidates, in Australia by the conservative Liberal Party, and in the UK by the Conservative Party to shape their own communications with respect to the value orientations of their targeted voter groups (Kavanagh, 1996; Sparrow and Turner, 2001).

Indeed, the first step of message development is the identification of homogeneous groups of voters who will respond in a consistent way to the campaign's communication efforts, as the electorate, like most consumer markets, is comprised of diverse segments of voters (Baines, 1999; Myers, 1996; Newman, 1994; Smith and Hirst, 2001). The marketing research literature is replete with techniques that incorporate a number of segment-defining characteristics, including attitude, behaviour, benefit, demographic, geographic, and psychographic. Although the political marketing literature has applied, adopted, and extended many of these techniques to the arena of elections and voting (Baines, 1999; Baines *et al.*, 2002, 2003; Newman, 1994, 1999b; Schiffman *et al.*, 2002; O'Shaughnessy, 1987; Reid, 1988; Smith and Hirst, 2001; Smith and Saunders, 1990; Yorke and Meehan, 1986), Baines *et al.* (2003) report that political marketing has primarily relied on just geographic, behavioural, psychographic, and demographic methods.

At the same time, Baines *et al.* (2003) note the growing importance of benefit segmentation within traditional consumer markets despite the challenges associated with empirically differentiating between concrete attributes and the more abstract benefits. Yet, this distinction is important as consumers use attributes and benefits differently in their decision making (Haley, 1968). That is, consumers use concrete attribute information to differentiate between products, but consumers' preference for a product is driven by the more abstract benefits (i.e. consequences and values) that the attribute satisfies (Jolly *et al.*, 1988; Phillips and Reynolds, 2009; Reynolds *et al.*, 1985; Reynolds and Jamieson, 1985). Therefore, developing campaign messages that affect voter decision making and choice entails a segmentation approach that not only describes what issues, positions, and traits are important to a given segment of voters, but also identifies why. It is this deterministic, rather than descriptive, insight that can provide campaign strategists with an understanding of the motivational and explanatory reasons underlying the drivers of voter decision making (Myers, 1996; Sparrow and Turner, 2001; Yankelovich and Meer, 2006).

In this paper, we apply recent marketing research innovations that address both the what and the why components of decision making to an electoral context that involves a choice between the two major-party candidates in the 2004 US presidential election, the incumbent President George W. Bush for the Republican Party and the challenger Senator John Kerry for the Democratic Party. We begin with a brief summary of laddering and means-end theory and provide concise overviews of three methodological and technological innovations. Specifically, we apply: two laddering elicitation questioning techniques that allow for a decision equity analysis (DEA) between targeted groups of voters (Reynolds *et al.*, 2001); and a segmentation technique, decision segmentation analysis (DSA), that allows for the identification of decision clusters or segments within these targeted groups (Reynolds, 2006). We demonstrate how these two techniques can be used, in concert, to aid in theme and message development. In addition, we demonstrate a technological innovation, real-time interactive online interviewing, that addresses the time and cost constraints of conducting laddering research and allows the researcher to obtain more geographically representative samples (Reynolds and Phillips, 2008). We conclude with a discussion of the implications of these innovations for campaign communications strategy including theme and message development.

Background

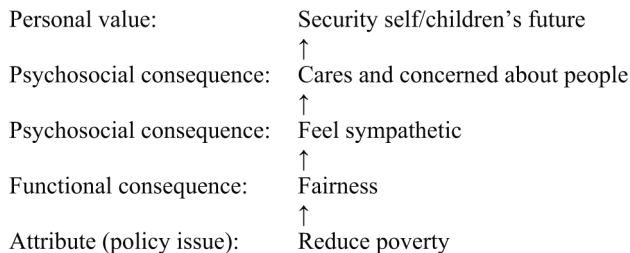
Laddering and means-end theory

Laddering is a qualitative research technique that has been used extensively within marketing to uncover the drivers of consumer perception and decision-making (Reynolds and Gutman, 1988; Reynolds and Olson, 2001; Reynolds and Phillips, 2008). The laddering method emanates from means-end theory, which is premised on the belief that individual choice behaviour is driven by personal values (Gutman, 1982). The objective of laddering interviews and means-end research is to obtain a hierarchical network of meanings (i.e. ladders and/or means-end chains) from a sample of respondents obtained by probing a distinguishing attribute with some version of the “why is that important to you?” question[1]. The result of moving the respondent up the “ladder of abstraction” through four hierarchical levels, beginning with a discriminating attribute to functional consequence to psychosocial consequence to value, yields a complete ladder (or collectively a mean-end chain, MEC)[2]. The interviewer’s task is to ensure that there is a complete ladder, defined as meanings at each of the four levels (i.e. attribute → functional consequence → psychosocial consequence → value). These individual ladders are then content analyzed and the connections (i.e. direct and indirect implications) shared by a minimum threshold of respondents (typically 70 percent) are then aggregated into means-end chains (MECs), which are then compiled to construct a hierarchical value map (HVM or voter decision map, VDM). This HVM, or VDM, is thought to graphically represent the reason an attribute (issue, position, trait) derives its importance. For example, consider the MEC obtained from a sample of 100 voters during the 1984 US presidential election (see Figure 1):

This MEC is interpreted as the primary reason the policy issue “reduce poverty” is important. In this case, it provides voters with a sense of personal security for themselves and/or their children, which is interpreted as the voters’ motivating decision driver.

Laddering elicitation questions and decision equity analysis

The traditional laddering interview begins with questioning techniques to elicit the key attribute distinctions about a particular product (Reynolds and Gutman, 1988). Such questioning techniques may entail eliciting the positive and/or negative factors that are strongly associated with the product. The elicited positive factors, or equities, are what attract consumers (voters) to a product, whereas the elicited negative factors, or disequities, are what repel consumers (voters) from a product. Both the equities and disequities of a product may be thought of as the mental representations (perceptual



Source: Norton (1987)

Figure 1.
MEC obtained from a
sample of 100 voters
during the 1984 US
presidential election

orientations or meanings) in the minds of a group of consumers (voters) and it is the composite of these equities and disequities that determines the value of the product to the consumer (voter). Therefore, equities enhance the value of the product whereas disequities limit or reduce the value of the product in the minds of the consumer (Olson and Reynolds, 2001).

Of particular relevance to political research are two elicitation techniques that can yield insight into voter decision structure: “top-of-mind” and “on-the-margin” (Reynolds *et al.*, 2001). Both of these elicitation techniques were used in the following study and allow for DEA (Blattberg *et al.*, 2001). The top-of-mind elicitation technique asks the voter, What is the very first thing that comes to your mind when you think of candidate/party/initiative X? And then follows-up with a question asking about the valence of the top-of-mind response: Is your top-of-mind comment: [response] about candidate/party/initiative X a positive or a negative to you? The interviewer then probes, Why is that a positive (or negative) to you? and then proceeds with the standard laddering interview protocol. As we demonstrate in the subsequent section a positive top-of-mind elicitation, or equity, serves as the basis for a DEA of a sample of voters.

The on-the-margin elicitation technique obtains the barrier to movement in terms of voting intention. That is, this question aims to identify the “barrier” that keeps the voter from having a stronger intention to vote for the candidate, party, or initiative being studied. For example, if the election was between one or more competing candidates, the interviewer might ask, Think carefully for a minute. What is the single most important thing – a position on a specific issue, or a leadership trait – that if changed about candidate X, would make you more likely to vote for him/her? This “barrier” would be considered a candidate’s disequity[3]. The resulting choice-driven elicitation then serves as the basis of the laddering interview and subsequent DEA. The rationale for this on-the-margin question is that knowing what specific issues, positions, and/or traits, and the underling decision network, are most likely to move voters in a desired direction (e.g. changing their vote intention from “Undecided” to “Leaning toward” a desired candidate) could aid in communications strategy including theme and message development.

The resulting MECs from the choice distinctions elicited using the above questions provide the campaign strategist with a rich set of data from which to examine the decision structure of key voter groups. For example, in a close election, swing voters (also known as floating voters) frequently determine the outcome. In a typical US election with two major-party candidates, swing voters are traditionally defined as voters at the middle three points (i.e. Leaning toward candidate X, Undecided, Leaning toward candidate Y) of the standard seven-point bipolar vote intention scale anchored by each candidate (i.e. Definitely candidate X, Most likely candidate X, Leaning toward candidate X, Undecided, Leaning toward candidate Y, Most likely candidate Y, Definitely candidate Y), whereas a candidate’s base supporters are defined as those with a strong (i.e. Definitely or Most likely will vote for the candidate) vote intention. Often times, then, the campaign strategist’s objective is to move the swing voters toward the desired candidate on this vote intention scale. An analysis of the MECs resulting from the disequity question yields insight into how to develop communications that can move the voter in the desired direction. Specifically, the campaign strategist now knows what to emphasize in positive ads both to reinforce the candidate’s strengths and to supplant perceptions of weakness, while also knowing which of the opponent’s negative issues, positions, and traits should be stressed in

negative attack ads (Phillips *et al.*, 2008). Furthermore, this same decision equity analysis (DEA) also could be conducted to meet the campaign strategist's objective of strengthening the vote intentions of the sponsoring candidate's base supporters by providing comparative insight about the decision structure of this voter group.

Decision segmentation analysis

Decision segmentation analysis (DSA) (Reynolds, 2006) is a segmentation approach that outputs clusters of MECs obtained from the above choice-based elicitation questions (i.e. top-of-mind and on-the-margin) of key groups of consumers (e.g. loyal vs. non-loyal or heavy vs light users) or voters (e.g. base supporters vs swing voters). DSA was developed to provide a standardized segmentation procedure, which uses the entire MEC as the unit of analysis such that each resulting cluster reflects one common decision orientation. The resulting decision clusters provide the marketer with a rich, qualitative understanding of each group's equities and disequities, the decision-making processes of each group, and perhaps more importantly, how these decision-making processes may differ. In short, segmenting voters by identifying the underlying basis of such attribute distinctions (e.g. issues, position, traits) in terms of decision-making processes allows the campaign strategist to better understand not only what attributes of the political product are important to such key voter groups, but also why these attributes are important. This insight can aid in the formation of political communications strategy, including theme and message development.

Specifically, DSA identifies which decision clusters or common pathways exist in means-end data (see Reynolds, 2006 for complete analytical procedures). Procedurally, DSA is a set of clustering algorithms that attempts to ascertain the dominant MEC structures in terms of accounting for the maximum amount of variance (both direct and indirect implications) in the laddering data set. Much like multidimensional scaling algorithms, a solution is reached given a pre-determined dimensionality, or in this case, a pre-determined number of clusters. And, like factor analysis, the percentage of variance (both direct and indirect implications resulting from the cluster of codes across levels) is output. Multiple runs are made with a different number of clusters in each solution, yielding the respective members of each cluster. The determination of which solution to utilize is based on the amount of additional variance accounted for with the next highest cluster size, much like the factor solution determination scree test in factor analysis. Typically, if a cluster does not account for 6-8 percent of the variance, it is not included in the final DSA solution.

Thus, the analytical procedure begins with the implication matrix composed from the aggregation of codes from the content analysis of the laddering interviews. The analyst then determines three values:

- (1) a minimum threshold value that defines the initial level for significant implications to be included in a given means-end chain (default of 10);
- (2) the number of desired clusters in the solution (2-9); and
- (3) the maximum number of codes that may be included in a chain.

A sensitivity analysis is then conducted that considers multiple configurations of threshold values, number of clusters, and number of codes included in a chain, along with a set of summary statistics that provide a measure of variance accounted for (for each chain cluster). This result permits the identification and selection of the most

stable, or internally consistent, solution, particularly with respect to the subsequent interpretation. In addition, the assignment of MECs to a given cluster, or segment, not only increases the overall interpretability of MEC data, but also allows for subsequent analysis with external voter-classification variables obtained from traditional polling data (e.g. demographics).

Real-time interactive online interviewing

Traditional laddering interviews involve a trained interviewer asking a series of questions to a respondent, face-to-face, usually at just one research facility. The greatest obstacles to conducting laddering research include the time and costs of interviewing and coding as well as the challenge of finding qualified interviewers (Reynolds and Phillips, 2008). In addition, convenience samples are generally a necessity due to the prohibitive costs associated with interviewer travel, thereby also limiting the geographic representativeness of the sample. Undoubtedly, the ability to obtain a representative sample would be of particular importance for an election campaign, as would the ability to obtain a timely research turnaround.

In the election study that follows, we use a real-time one-on-one interviewing approach in an online environment using commercially available software: a complete turnkey system for conducting laddering research, including both questionnaire programming and voice over the Internet interviewing, as well as coding and analysis protocols. What differentiates this online system from other e-laddering procedures is that this system allows for real-time interactivity between the respondent and the interviewer using both voice and text.

2004 US presidential election study

The aim of this study was to demonstrate how the segmentation of voters based on decision making processes in the 2004 US presidential election, using means-end laddering research innovations (e.g. elicitation questions that allow for a DEA, DSA, and real-time interactive online interviewing), can contribute to campaign communication strategy through theme and message development.

Sample and timing

Respondents were members of a national (US) online discontinuous consumer access panel and received a nominal monetary reward for their participation in this study. Panel members were invited to register for a unique survey about the upcoming 2004 US presidential election that was being conducted by university professors. The invitation stated:

What makes this survey unique (and fun!) is that this study uses a computerized interactive "chat" format so that we can better understand your thoughts and opinions.

Panel members were also informed that they would need to have internet access and must be able to hear sound on their computer as their interviewer would be speaking to them live via the internet. They were also asked to list three convenient times to schedule an interview.

Respondents were screened using two criteria:

- (1) they had voted in the 2000 US presidential election; and
- (2) they intended to vote in the 2004 US presidential election.

In addition, to better represent the electorate population, we balanced the sample by voting intention (i.e. Kerry supporters, Swing voters, Bush supporters), age (i.e. under 40, 40 and over), and gender. Respondents meeting these screening criteria were contacted by the researchers via e-mail informing them of their interview time, their interviewer's name, and the web address of the interview. Respondents were instructed to click on the web address link in the e-mail at the time of the interview and their interviewer would meet them there. Interviews ($n = 114$) were conducted from late-May through late-July prior to the November 2004 election.

Interviews

Prior to the start of our study, we trained our five interviewers in means-end theory and the laddering technique, as well as in how to use the online interviewing software. Respondents were questioned by the interviewers with both sound (voice over the Internet) and text, and answered in real-time using either a point-and-click format for fixed-choice response alternatives, or a typing format for open-ended responses. In addition, to control for possible order effects, the software randomized the order of the response alternatives. A summary of the relevant interview questions and procedures is presented in the Appendix.

For the laddering portion of the interview, respondents typed their reply to each of the interviewer's spoken questions in the reply box provided by the software. The interviewer reviewed the respondent's answer in real-time and determined the level (i.e. attribute, functional consequence, psychosocial consequence, value) of each response before probing the respondent by voice for the next ladder level. Once completed, the interviewer displayed the complete ladder on the respondent's screen while providing a verbal summary. The respondent was then asked to confirm the accuracy of the ladder and the interviewer made changes if needed.

The average time required to complete the main interview, including the four ladders, was approximately 35 minutes. In general, respondents were positively disposed toward these methods of interactive questioning and the online interviewing process. The average self-assessed accuracy rating of responses to the laddering questions was 4.4 on a scale of 1 (not accurate) to 5 (perfectly accurate).

Table I contains the summary statistics for the demographic profile of the sample, in addition to party affiliation and voting intention. Also included are summaries of the news sources from which the respondents acquire their political information, as well as their self-reported knowledge of political issues.

Data quality and codes

The quality of the means-end data obtained was excellent; the percent of complete ladders, L_Q , equalled 97.3 percent (Reynolds and Phillips, 2008). The software required the interviewers to classify each response in real-time as to level of abstraction (attribute [e.g. issue position, or trait], functional consequences, psychosocial consequences, and personal values), and required a complete MEC to be obtained before moving on to the next question. The coding of the verbatim comments was performed by two independent judges; differences were resolved by an independent third judge. The percentage of identical code assignments between the two judges was 85.5 percent (reliability index $I_r = 0.92$; Perreault and Leigh, 1989). A list of the resulting frequencies of the codes by ladder type (elicitation technique and candidate) appears in Table II. Note that the most

Table I.
Summary of general
descriptive questions by
voting intention

Question	Kerry (<i>n</i> = 39) %	Vote intention Swing (<i>n</i> = 33) %	Bush (<i>n</i> = 42) %
<i>Demographics</i>			
Women	44	49	52
Married	49	55	76
Under 40	31	49	41
White	95	30	88
College graduate	49	52	52
Children	23	39	48
Income US\$50K +	50	49	62
<i>News source</i>			
TV network news	33	39	33
Cable news	28	21	29
Radio	3	3	5
Magazines	0	6	0
Newspapers	15	12	17
Internet	18	18	17
Other	3	0	0
<i>Party affiliation</i>			
Democrat	69	18	2
Independent	31	67	29
Republican	0	15	69
<i>Political knowledge</i>			
(Mean on 1-5 scale)	3.5	3.3	3.5

frequently mentioned candidate attributes (i.e. issues, positions, and traits) include “candidate image”, “aggressive foreign policy”, “lack of a clear position”, and political ideology (i.e. “liberal Democrat” and “conservative Republican”). Also note that the top three personal values that give meaning to these underlying attributes (and their respective functional and psychosocial consequences) are “peace of mind”, “personal security”, and “quality of life”.

Application of means-end laddering innovations to campaign message development

The innovations in elicitation questions and DEA, DSA, and real-time interactive online interviewing have the potential to offer insights useful for campaign message development. Although there are a number of segments that may be targeted in a given campaign, the prototype analysis detailed below focuses on two specific objectives:

- (1) reinforcing the base supporters (voters who definitely or most likely will vote for your candidate); and
- (2) appealing to and persuading swing voters (voters who are undecided or leaning toward one of the candidates).

This analysis includes interpretative insights regarding theme and message development for both of these key voter groups – base supporters and swing voters.

	Top-of-mind ladders		Disequity ladders		Overall
	Kerry (L = 114)	Bush (L = 114)	Kerry (L = 91)	Bush (L = 88)	(L = 407)
	%	%	%	%	%
<i>Attributes</i>					
139 Candidate image	30	29	18	20	25
132 Aggressive foreign policy	1	32	12	30	18
133 Lack of clear position	20	1	32	2	14
140 Conservative Republican	0	14	1	26	10
136 Liberal Democrat	19	0	16	0	9
134 Intellect	3	14	1	8	7
108 Average citizen orientation	9	5	4	8	7
135 Military record	6	0	6	0	3
138 Society's rights	0	5	1	7	3
122 Change in office	9	0	0	0	3
137 Individual rights	3	0	8	0	3
Sub-totals	100	100	100	100	100
<i>Functional consequences</i>					
230 Leadership ability	29	28	20	18	24
233 Trustworthy	17	22	21	19	20
238 Caring	10	9	9	12	10
236 Principles/values	7	9	14	7	9
232 US military lives	1	12	5	11	7
234 Voter representation	8	5	8	8	7
235 US economy	12	3	7	8	7
237 US world standing	7	7	8	5	7
214 US issues need attention	4	4	4	11	6
231 Experience	4	1	3	1	2
Sub-totals	100	100	100	100	100
<i>Psychosocial consequences</i>					
331 Confidence	51	39	40	45	44
301 In control	11	16	11	16	13
335 US society well-being	9	13	13	8	11
334 American unity	7	13	7	7	9
302 Defense orientation	4	7	11	5	7
333 Economic opportunity	9	6	5	6	7
330 Personal freedom	5	3	5	8	5
306 Informed need	5	3	7	3	5
Sub-totals	100	100	100	100	100
<i>Values</i>					
402 Peace of mind	42	25	33	37	34
403 Personal security	19	27	28	27	25
401 Quality of life	18	20	16	17	18
405 Patriotism	8	13	9	4	9
407 Family security	5	5	8	6	6
404 Independence	3	5	1	4	3
411 Belonging	2	4	2	6	3
410 Self-esteem	3	1	2	0	2
Sub-totals	100	100	100	100	100

Note: L = number of ladders

Table II.
Summary of means-end
chain codes by elicitation
question and candidate

Elicitation questions and equity analysis

Responses to the top-of-mind elicitation question, in combination with the valence, permits an understanding of what are the prototypical, defining elements in memory with respect to each candidate. A summary of the four possible valence combinations for the three voter intention groups appears in Table III.

Three findings with regard to the top-of-mind elicitations are worth noting. First, note the relationship between those with a clear vote intention and the valence of their top-of-mind association for the two candidates. The valence of the top-of-mind association for the preferred candidate is predominantly positive while the top-of-mind association for the opposition candidate is predominately negative (82 percent for Kerry + /Bush – and 91 percent for Kerry – /Bush +). Second, with regard to the swing voters, Kerry would appear to have a slight advantage when one contrasts the 27 percent to the 18 percent for the split valences. Third, the swing voters have over a three-to-one margin for dual negatives as opposed to dual positives. One could perhaps interpret this finding as an indication that the trade-off being considered by swing voters has to do with the lesser of two evils.

As noted earlier, one objective of campaign strategy may be to reinforce base support. In order to accomplish this, the campaign strategist would first determine which of the political product’s attributes (issues, positions, traits) would be communicated in order to solidify the base. In Table IV, we illustrate how to identify the equities to emphasize with respect to Kerry’s base supporters.

The initial step in this DEA is to identify the most salient top-of-mind mentions from Kerry’s base supporters (Table IV columns A and E). The second step is to account for the negative perceptions that Kerry’s base supporters have toward Bush (Table IV column F = column A + column B). This information provides the campaign strategist with an understanding of how to leverage the polarizing discrimination between the candidates for Kerry’s base supporters. For example, as shown in Table IV column G, the most discrimination between these two candidates occurs on the attributes “candidate image”, “aggressive foreign policy”, and “intellect”. The third step would be to factor in the perceptions of Bush’s base supporters, realizing that the differences between their discriminating factors, in combination with those of Kerry’s supporters, provide a measure of the overall importance of each issue from a joint perspective (Table IV column H = [column A + column B] – [column C + column D]). Finally, Table IV column I ranks the critical equities to be focused upon to solidify the base, namely, “intellect”, “change in office”, “average citizen orientation”, and “aggressive foreign policy”. In this illustration, it is these issues, positions, and traits that the campaign strategist would emphasize in the communications to Kerry’s base supporters.

Valence of top-of-mind elicitation		Kerry (<i>n</i> = 39) %	Vote intention	
Kerry	Bush		Swing (<i>n</i> = 33) %	Bush (<i>n</i> = 42) %
+	–	82	27	0
–	+	0	18	91
–	–	13	42	9
+	+	5	12	0

Table III.
Candidate valence
combinations by vote
intention

Attributes	A Kerry's base supporters' top-of- mind valence Kerry + (L = 34) %		B Bush - (L = 37) %		C Bush's base supporters' top-of- mind valence Bush + (L = 38) %		D Kerry - (L = 42) %		E	F	G	H	I
	Kerry + (L = 34) %	Bush - (L = 37) %	Bush + (L = 38) %	Kerry - (L = 42) %	Kerry + rank	Kerry total %	Kerry total rank	KB net	KB net rank				
139 Candidate image	24	25	38	29	1.5	49	1	-18					
122 Change in office	24	0	0	0	1.5	24	4	24					
136 Liberal Democrat	16	2	0	20	3	18	6	-2					
108 Average citizen orientation	11	9	3	6	4	20	5	11					
134 Intellect	8	23	3	2		31	3	26					
135 Military record	8	0	0	4		8		4					
132 Aggressive foreign policy	5	30	25	0		35	2	10					

Notes: L = number of ladders. From Table III, $Kerry + L = [(0.82 + 0.05] * 39)$ and $Bush - L = [(0.82 + 0.13] * 39)$. For Kerry supporters, $Kerry + \%$ equals percentage of positive top-of-mind ladders. $Kerry\ total\ \% = (Kerry + \% + Bush - \%)$. $KB\ net = (Kerry\ total\ \% - Bush\ total\ \%)$, where $Kerry\ total\ \%$ and $Bush\ total\ \%$ are computed from their respective base supporters

Table IV.
Kerry base equity
analysis from top-of-mind
associations

Decision segmentation analyses (DSA)

DSA segments MEC data into “decision clusters” and permits a more systematic approach for identifying the common decision-based networks of meaning that can serve as the basis for theme and message development. The results of our first DSA from Kerry’s base supporters appear in Table V.

The decision chains summarized on the left side of Table V represent common ladders across the sample for positive top-of-mind associations for John Kerry. The percentage of these clusters that occur for Kerry’s base supporters is italicized, revealing that three perceptual/decision orientations account for 57 percent of the total, with the most frequent decision segments being A, B, and C, accounting for 21 percent, 18 percent, and 18 percent respectively. Thus, identifying these three clusters serves to focus the development of a communication strategy to reinforce the base supporters. Notice that this DSA resulted in three rather distinct decision clusters with little overlap in their value orientations suggesting that separate messages be developed for each decision

Decision cluster		Overall (<i>n</i> = 47) %	Kerry (<i>n</i> = 34) %	Vote intention Swing (<i>n</i> = 13) %	Bush (<i>n</i> = 0) %
A	402 Peace of mind 401 Quality of life 331 Confidence 230 Leadership ability 139 Candidate image	23	<i>21</i>	31	0
B	403 Personal security 333 Economic opportunity 331 Confidence 235 US economy 139 Candidate image	17	<i>18</i>	15	0
C	407 Family security 402 Peace of mind 335 US society well being 331 Confidence 237 US world standing 122 Change in office	13	<i>18</i>	0	0
D	402 Peace of mind 331 Confidence 301 In control 238 Caring 122 Change in office	11	9	15	0
E	402 Peace of mind 331 Confidence 231 Experience 230 Leadership ability 136 Liberal Democrat	11	9	15	0
*	<i>Unassigned ladders</i>		<i>26</i>	<i>23</i>	<i>0</i>
	Totals	75	100	100	0

Table V.
Decision clusters for
positive Kerry
top-of-mind ladders from
Kerry supporters

cluster. For example, communications targeting voters in decision cluster A, the largest cluster of Kerry's base supporters, would emphasize the MEC of candidate image → leadership ability → confidence → quality of life → peace of mind. Communications targeting voters in the other decision clusters would be developed in a similar manner. Note also that 26 percent of the ladders could not be assigned to one of the five segments, which simply means that they did not share any of these perceptual orientations.

To achieve the objective of appealing to and persuading swing voters, the campaign strategist would determine which messages might move the swing voters toward the desired political product (candidate, party, initiative), in this case, candidate John Kerry. Determining how to appeal to the swing voters involves using DSA with disequity ladders, which focuses on identifying the "barriers" to gaining the support of swing voters. As noted previously, in close elections (such as the 2004 US presidential election) swing voters frequently determine the outcome. The summary of the DSA with disequity ladders appears in Table VI.

Decision cluster		Overall (<i>n</i> = 91) %	Kerry (<i>n</i> = 16) %	Vote intention Swing (<i>n</i> = 33) %	Bush (<i>n</i> = 42) %
A	402 Peace of mind 335 US society wellbeing 331 Confidence 233 Trustworthy 230 Leadership ability 133 Lack of clear position	23	25	27	19
B	402 Peace of mind 331 Confidence 233 Trustworthy 139 Candidate image 133 Lack of clear position	13	19	15	10
C	403 Personal security 401 Quality of life 333 Economic opportunity 331 Confidence 235 US economy 136 Liberal Democrat	11	13	3	17
D	403 Personal security 302 Defense orientation 237 US world standing 230 Leadership ability 132 Aggressive foreign policy	10	6	12	10
E	402 Peace of mind 401 Quality of life 331 Confidence 236 Principles/values 133 Lack of clear position	8	0	3	14
*	<i>Unassigned ladders</i> Totals	65	38 100	39 100	31 100

Table VI.
Decision clusters for
Kerry disequity ladders
from swing voters

The clusters of codes on the left again represent the common decision segments, or cluster groups, and the percentages correspond to how frequently they appear for each of the three voter intention classifications. The most frequent decision segments for the swing voters are A, B, and D (shown as italicized), accounting for 27 percent, 15 percent, and 12 percent, respectively, for a total of 54 percent. Thus, these three decision orientations, which define the barriers for gaining support of the swing voters, would provide a strategic blueprint for message development. Worth noting is that the first two decision segments share several common codes, namely, “lack of clear position”, “trustworthy”, “confidence”, and “peace of mind”. Although the other codes within the individual segments suggest a few other connections that could be made, these common elements define the strategic message that, if communicated, would have the largest impact on moving swing voters toward Kerry (42 percent, by combining Kerry disequity decision segments A and B). This represents the positive messages the candidate could deliver in communications, including speeches and campaign advertisements.

Another campaign communications task might involve determining where one’s opponent could potentially have the most impact and then creating negative or attack communications to forestall the opponent’s campaign from making inroads into the swing voters. The decision segments developed from the opponent’s disequity barriers provide the basis upon which to ground this component of campaign message development. Table VII presents the decision segments developed from the Bush disequity (i.e. barrier) ladders.

A review of these five decision segments of the swing voters that Bush would want to focus upon suggests where Kerry’s campaign might attack, thereby minimizing Bush’s likelihood of success (figures shown in italics). The first area (A: 24 percent) involves developing an attack message that questions the impact of Bush being a “conservative Republican” on his “leadership ability”. The second area to attack (C: 18 percent) is the connection between “aggressive foreign policy” and the loss of “US military lives”. In these top two examples, like the remaining other three (i.e. clusters B, D, and E), the decision networks provide the reasons why these attributes and consequences are important to the voter, and communications that tap into these higher-order, motivating reasons, therefore, should be more effective in successfully delivering the message.

Finally, an additional positive message strategy for Kerry would focus on minimizing the “lack of clear position” perception, which is the basis for decision segments A, B, and E from Table VI, as identified in the Kerry disequity analysis.

In sum, this combination of analyses, grounded in understanding the decision structures of specific target audiences, could provide a solid foundation for the development of an effective campaign communications strategy, including theme and message development. The communications strategy development process illustrated here appears to have potential for several reasons. First, the use of the question formats in top-of-mind and on-the-margin disequity correspond directly to two possible campaign objectives:

- (1) reinforce one’s base; and
- (2) appeal to and persuade swing voters.

Decision cluster		Overall (<i>n</i> = 88) %	Kerry (<i>n</i> = 39) %	Vote intention Swing (<i>n</i> = 33) %	Bush (<i>n</i> = 16) %
A	402 Peace of mind 401 Quality of life 331 Confidence 230 Leadership ability 140 Conservative Republican	23	13	24	44
B	403 Personal security 402 Peace of mind 331 Confidence 233 Trustworthy 132 Aggressive foreign policy	22	33	12	13
C	402 Peace of mind 331 Confidence 301 In control 232 US military lives 132 Aggressive foreign policy	17	18	18	13
D	401 Quality of life 335 US society well being 331 Confidence 238 Caring 140 Conservative Republican	11	8	12	19
E	411 Belonging 330 Personal freedom 236 Principles/values 234 Voter representation 138 Society's rights	7	5	12	0
*	<i>Unassigned ladders</i> Totals	80	23 100	21 100	13 100

Decision-based
voter
segmentation

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Table VII.
Decision clusters for
Bush disequity ladders
from swing voters

Second, the use of the DSA methodology not only simplifies the analysis, but it also provides for direct quantification of the targets as well as the detailed profiling of how to design the necessary communications. These decision segments can then be combined with demographic information for the purpose of media selection. Third, the use of the Internet greatly minimizes the time requirement needed to conduct this type of one-on-one, means-end research.

Conclusion

Personal values are the driving force of both consumer and voter decision making. By developing communications that link the salient issues, positions, and traits of a political campaign to voters' values, campaign strategists seek to effectively position their political product within key voter groups or segments. However, while there are many marketing research techniques that describe and segment voters by differing characteristics, few provide as a rich qualitative understanding of the motivational and explanatory reasons underlying the drivers of voter decision making as one grounded

in the decision-making process. In this study we sought to demonstrate how the segmentation of voters based on decision-making processes in the 2004 US presidential election, using means-end laddering research innovations, could contribute to the communication strategy development processes.

Three key methodological and technological innovations, in concert, were found to provide an efficient set of methods to serve as the foundation for campaign communication strategy, in particular, theme and message development. The first innovation involves new methods to frame questions and corresponding analyses that directly address two prototypical campaign communications objectives: reinforce base support, and appeal to and persuade swing voters. The second innovation is an analytical methodology that identifies decision clusters, or segments, from the means-end data and provides a quantitative estimate as to their respective sizes, which then permits a prioritization of campaign messages. The combination of decision segments with traditional demographic information yields directional input with respect to media selection for theme and message development. The third innovation is a computer system that facilitates real-time one-on-one interviewing of likely voters via the internet using voice-over-internet technology to gather the voter decision networks. This technological innovation made the interviewing and analysis more time- and cost-efficient, which, when conducting research for an electoral campaign, can offer a competitive advantage.

For purposes of illustration, these innovations were applied to the communication strategy development process for John Kerry's 2004 US presidential election campaign. The resulting interpretive analyses and recommendations, however, are not intended to suggest or make any definitive statements about either Bush's or Kerry's campaign or the election and its outcome. Rather, this demonstration serves only to illustrate how these innovations can be applied in an electoral context. In addition, the recommendations for message development that resulted from these analyses were consistent with a following-dominated, or customer-led, strategic posture (Henneberg, 2006; Slater and Narver, 1998). Future research should examine how these innovations might relate to other strategic orientations.

In sum, understanding voter decision-making as a basis for political campaign strategy development, by providing a template of what key decision networks exist and what personal values serve as their anchor, is suggested to have potential for the development of communications strategy. Although different political environments will demand different and likely more complex approaches to framing the political choice alternatives, it is hoped that this simple two-choice example serves to illustrate the underlying research principles.

Notes

1. Certainly, the sample of respondents must be relevant to the research objective as the laddering methodology would not be appropriate if no attributes were meaningful or distinctive.
2. Many researchers use the terms ladder and MEC interchangeably.
3. The on-the-margin elicitation question could also aim to identify the "barrier" to being more likely to vote for the opposition. This "barrier" would be considered a candidate's equity.

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Appendix. Summary of interview questions and procedures

- Introduction, including a practice session with similar question formats.
- Background and demographic information (12 questions).
- Top-of-mind image for both candidates using the top-of-mind (equity) elicitation question (“What is the very first thing that comes to your mind when you think of candidate X?”), valence (“Is your top-of-mind comment: [response] about candidate X a positive or negative to you?”), and ladders for both candidates (“Why do you think [response] regarding candidate X is a positive [or a negative] to you?”)
- Voting intention using a seven-point scale, anchored by Definitely Kerry and Definitely Bush (Undecided is mid-point).
- Disequity (barrier) ladders for both candidates (two ladders, except for voters with a definite vote intention where only one ladder was obtained) using the on-the-margin elicitation question (“Think carefully for a minute. What is the single most important thing – a position on a specific issue, or a leadership trait – that if changed about candidate X would make you more likely to vote for him/her? That is, what is the primary barrier that keeps you from being more likely to vote for candidate X?”).
- Self-reported assessment of accuracy of responses to laddering questions using a five-point scale.

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