PROJECTIVE TECHNIQUES IN CONSUMER RESEARCH

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Abstract

For many years consumer researchers have suggested that non-conscious processes may operate on consumer behavior. However, understanding these processes has been a difficult endeavor. One indirect measure, the projective technique, has been used to help uncover consumer attitudes, thoughts, and feelings that would not be necessarily detected by more straightforward questioning. The different types of projective techniques are described as well as a brief review of the literature where projective techniques have been used to better understand consumer behavior. The advantages and disadvantages of projective techniques are discussed. This paper aims to provide an overview of projective techniques in qualitative consumer research. A secondary aim is to open this topic up for further discussion and recommend further research in this area.

Introduction

Consumer behavior is defined as the acquisition, consumption and disposal of products, services, and ideas by decision making units (Jacoby, 1976). The primary goal of consumer research is to produce knowledge about consumer behavior (Calder & Tybout, 1987). Increasingly, consumer researchers have suggested that automatic or non-conscious processes may operate on consumer behavior (Bargh, 2002; Fitzsimins et al., 2002). Indirect measures of consumer attitudes were developed to measure attitudes that would not be necessarily detected by explicit measures (Greenwald & Banaji, 1995). These measures do not reference objects in a respondent's personal history, but instead focus a respondent's attention on participating in some task that can indirectly reveal an inaccessible attitude. One such indirect measure and the focus of this literature review is the projective technique.

Projective techniques "provide verbal or visual stimuli which, through their indirection and concealed intent, encourage respondents to reveal their unconscious feelings and attitudes without being aware that they are doing so" (Will, Eadie, & MacAskill, 1996, p. 38). Projective techniques are often referred to as disguised-unstructured techniques. They are termed disguised tasks because the subjects are aware they are participating in a study yet unaware of what the researcher is interested in measuring; they are considered unstructured tasks because their response alternatives are not limited or determined by the researcher (Klofper & Taulbee, 1976). Projective techniques were originally developed by clinical psychologists, psychiatrists, and other personnel trained in personality assessment to gain some understanding into the underlying problems of the patient (Donoghue, 2000). From a clinical and psychoanalytic perspective, the concept of projection is interpreted as a defense mechanism whereby the ego protects and defends itself from anxiety by externalizing thoughts and feelings, directly ascribing them to other individuals, inanimate objects, and environments (Donoghue, 2000; Kline, 1983). Examples of projective techniques in a clinical setting include (but are not limited to): the Rorschach Inkblot Test, Thematic Apperception Test (TAT), Draw-a-Person (DAP) test, and Washington Sentence Completion technique (Klofper & Taulbee, 1976; Seechrest, Stickle, & Stewart, 1998).

In the consumer domain, projective techniques are a way for researchers to transcend communication barriers and illuminate aspects of consumer experience that may be difficult to study. Researchers are able explore people's thoughts, feelings, and experiences, and encourage respondents to discuss private issues or motives (of which the respondent may not be aware of) without respondents feeling threatened by the direct line of questioning (Haire, 1950). Projective techniques are used to overcome the obstacles inherent in explicit consumer attitude measures. For example, when presented with explicit attitude measures, respondents may fear being judged in a negative manner by those involved with the research study and may be reluctant to endorse certain items that reflect their attitudes. As a

result, many respondents may veil their responses. It is a basic human tendency to present oneself in the best possible light (Fisher, 1993), but the effect of distorted data gathered from self-report, overall, is deleterious to the purpose of the research. Respondents, whether with or without awareness, tend to offer answers that are socially acceptable when placed in the role of a subject in a research experiment. When used properly, projective techniques enable the researcher to circumvent some of these common social barriers that inhibit the respondents' expression of attitudes and behaviors.

Types of projective techniques

There are a variety of projective techniques that have been and/or are currently used in marketing research. They can be subsumed under the following four headings: (1) association tasks; (2) completion tasks; (3) construction tasks; and (4) expressive tasks (Will et al., 1996).

Association tasks, the most commonly employed projective technique, require subjects to respond to the presentation of an object by indicating the first word, image, or thought elicited by the stimulus (Donoghue, 2000; Will et al., 1996). The basic premise behind association tasks is that thoughts immediately brought to mind are automatically activated by the presentation of the stimulus (Hussey & Duncombe, 1999; Robertson & Joselyn, 1974; Will et al., 1996). Researchers employ these measures because they are seemingly able to tap an automatically activated association with a stimulus object. A byproduct is that respondents often enjoy these tasks because they view the procedure as a game or an entertaining exercise. Word associations, a specific type of association task, are especially valuable for extracting information from consumers about a product or brand (Will et al., 1996). By asking what words come to mind when a stimulus word or phase is presented—e.g., Coca-Cola: beverage, thirst, fun, relaxation—respondents reveal valuable information regarding their attitudes and beliefs (Day, 1989). Subjects' responses often provide the researcher with a product- or brand-related consumer vocabulary.

Another association task often employed is termed brand personification, or association of a brand or product with a person or personality type (Donoghue, 2000; Hussey & Duncombe, 1999). During these tasks, respondents are given a number of words and pictures and instructed to select those that they associate with a brand and/or product. The respondents are also asked to explain their choices, providing reasons for their selections. Respondents' perceptions and imagery associated with a specific product or brand are deduced by analyzing the leitmotif of their responses (Donoghue, 2000; Green, 1984).

Completion tasks encompass a second type of projective technique where, most often, the respondent is given an incomplete sentence, story, argument, or conversation and is instructed to complete it (Donoghue, 2000; Gordon & Langmaid, 1988; Will et al., 1996). There are two specific types of completion procedures: (1) sentence completion tasks and (2) story completion tasks. First, sentence completion tasks require respondents to finish a sentence in any manner that they deem appropriate. It is employed with great frequency because a significant amount of information can be gathered in a short period of time. For instance, contextual information and product- or brand-specific associations can be elicited. Examples assessing the product Coca-Cola could include, "People who drink Coca-Cola are _____," or "I drink Coca-Cola because it is _____." However, its main limitation is that, unlike some of the more complex completion procedures, its structure dissuades elaboration, thus limiting researchers' ability to examine multifaceted consumer associations (Gordon & Langmaid, 1988; Green, 1984).

Second, story completion is a specific task whereby the researcher can examine respondents' level of emotional attachment with a product or brand. The procedure is quite simple: the only instruction is for respondents to tell a story about the product or brand of interest. In some instances, respondents are instructed to complete a hypothetical conversation between actors/characters while other times pictures are presented as the stimuli, in a manner similar to

the way the Thematic Apperception Test (TAT) is used in a clinical setting. Briefly, when the TAT is used, respondents are given a set of TAT cards where each picture depicts an individual (or more than one individual) in a fairly ambiguous environment engaging in an indistinct behavior. It is the respondent's responsibility to describe a story of what may be occurring in the picture. This procedure is repeated for several TAT cards. Based upon the sum of the explanations, the clinician is able to deduce the theme of the patient's stories. This motif provides insight into the psychological conflicts, past and present, central to the patient (Klofper & Taulbee, 1976). Similarly, many consumer researchers have adapted the TAT to a consumer setting. Respondents, when asked to tell a story about a picture, product, or brand, will describe a detailed tale where they increasingly reveal their own attitudes and feelings toward an attitudinal object as the story unfolds.

The third type of projective technique often used in marketing and consumer research is a construction task. Third person questioning and bubble drawings are the most commonly employed construction procedures. Essentially, respondents are instructed to present their opinions of other people's actions, feelings, or attitudes. This allows people to respond freely, as they are not explicitly stating how they would personally act, believe, or think (Donoghue, 2000; Gordon & Langmaid, 1988; Will et al., 1996). Thus, an attitude or belief that they might be unwilling to report becomes one that they would express willingly because they do not have personal accountability. The main benefit for researchers is that, typically, subjects' responses mirror their own thoughts and feelings (Donoghue, 2000; Gordon & Langmaid, 1988). However, the main limitation is that people may simply be describing societal norms instead of their own attitudes and behaviors.

Bubble drawings (often referred to as cartoon tests) are tasks where respondents are instructed to fill in thought or speech bubbles corresponding to characters depicted in a cartoon strip. The characters are presented in ambiguous consumer-related scenarios that are of interest to the researcher (e.g., a consumer looking for an item in the store, a consumer at the checkout line) (Donoghue, 2000; Gordon & Langmaid, 1988). Again, akin to the third person questioning technique, the basic premise behind bubble drawings is that respondents will project their own opinions onto the cartoon characters (Will et al., 1996). It is hypothesized that responses will reflect respondents' own attitudes and behaviors (Donoghue, 2000; Will et al., 1996).

The final type of projective technique is an expressive task. When expressive tasks are employed, respondents are instructed to role-play, act, draw, or paint a specific concept or situation (Donoghue, 2000). For example, in role playing exercises, the respondent is asked to adopt the role or behavior of a product or brand. Following the exercise, the content, in addition to the construction process, is analyzed. As has been described, the basic premise is that respondents will likely project their own opinions onto the thoughts of the person in the role playing exercise. It is suggested that the way respondents express their answers will match their own feelings (Donoghue, 2000; Will et al., 1996).

Projective techniques in consumer research

The first published study on projective techniques in the consumer literature was the Haire shopping list study (Haire, 1950). At the time of the study, Mason Haire was a preeminent behavioral scientist who blended the psychological trends of that time into the consumer domain (Fram & Cibotti, 1991). Haire reported that motives exist which are below the level of verbalization because they are socially unacceptable, difficult to verbalize cogently, or unrecognized, and these motives were intimately related to the decision to purchase or not to purchase. As such, Haire found that it was possible to identify and assess these consumer motives in an indirect manner.

The primary focus of Haire's research was consumers' image of a new coffee product—Nescafé instant coffee. At the time of the study, instant coffee was considered a product innovation (most households used traditional drip coffee), but marketers were wary that consumers would not

accept the product unequivocally. It was during this period of history that women were expected to spend considerable amounts of time preparing food and caring for their families (Haire, 1950). Executives believed any product that threatened the image of the woman as a doting and competent housewife could potentially be a marketing disaster. The primary goal of the Haire study was to assess consumer sentiment toward this inventive yet controversial product. However, Haire was apprehensive about using explicit measures to assess consumers' attitudes toward Nescafé instant coffee. Haire believed that respondents would attach additional meaning to the use of instant coffee in their homes, and explicit measures would not be able to capture respondents' deepest thoughts and feelings toward the product. Therefore, Haire tried using projective techniques, which were very popular in clinical psychology at the time of Haire's research, an indirect approach to measure consumer attitudes toward Nescafé instant coffee.

In the study, two shopping lists were prepared for respondents to examine. They were identical in all aspects except that one list specified the purchase of Nescafé instant coffee while the other indicated Maxwell House Coffee (traditional drip ground). The lists were administered to alternate subjects and individuals had no awareness that another list existed. Each shopping list was administered to fifty women in the Boston area (100 women total). Respondents were instructed to read the shopping list and attempt to characterize the woman shopping for the groceries on the list. The respondents were then asked to write a brief description of the woman's personality and characteristic traits. Lastly, the respondents were instructed to indicate the factors that influenced their judgments of the woman who was shopping for groceries (Haire, 1950).

Overall, Haire (1950) found that the Maxwell House Coffee shopper was depicted frequently in a positive manner. Shoppers with this product on their list were more often viewed as a good housewife by respondents than those who had Nescafé instant coffee on their list. Respondents viewed the Nescafé shopper as lazy, sloppy, and an inefficient household planner and scheduler. Moreover, almost half of the respondents indicated that Nescafé shoppers were indolent and lacking organizational skills. Based on the substitution of Maxwell House Coffee for Nescafé instant coffee (and vice versa), respondents readily altered their perceptions of the female shopper. It appeared that a switch from the well-established, home-made drip coffee (i.e., Maxwell House Coffee), with an associated meaning of concern for one's family, to the instant coffee (i.e., Nescafé), seemingly associated with respondents' perceptions of what professional women would purchase, influenced respondents' ratings of the shoppers. Haire (1950) suggested (and many researchers later supported his contention) that explicit attitude measures would not allow researchers to access this important information. Respondents would be unwillingly, and perhaps unable, to volunteer their thoughts, beliefs, and feelings toward the products.

Haire (1950) completed two subsequent studies in an attempt to better understand the findings from the initial experimental effort. In the second study, to determine whether the negative attitudes toward shoppers were caused by the use of a labor- and time-saving product, Haire added a fictitious convenience product to both the Maxwell House Coffee and Nescafé shopping lists. This product was named Blueberry Fill Pie Mix. Haire (1950) believed that this manufactured good would have rife negative association among respondents, like Nescafé instant coffee, because women were expected to spend substantial amounts of time cooking, baking, and preparing meals for their husbands and families. That is, if women were going to bake a blueberry pie for their families, then they were expected to use fresh blueberries and prepare the pie from scratch. It was hypothesized that any deviation from this norm would tarnish the image of women as caring, considerate, and attentive housewives.

Overall, Haire (1950) found that the addition of Blueberry Fill Pie Mix influenced respondents' descriptions of the shoppers. Whereas in the first phase the Nescafé shoppers were perceived as being lazy and careless, in the second phase, both the

Maxwell House Coffee and Nescafé shoppers were described in negative terms when Blueberry Fill Pie Mix was an item on their shopping list (Haire, 1950). Both groups were described in unpromising and objectionable terms. Haire attributed these findings to the character of the product, Blueberry Fill Pie Mix, which was deemed even more offensive than Nescafé instant coffee. At the time of this study, prepared foods were not yet a component of mainstream society. Again, it is unlikely that explicit measures would have yielded similar results. However, projective techniques enabled Haire to access this information in an indirect, less threatening manner.

Haire (1950) also conducted a third study in which his purpose was to assess the relationship between unconscious motives and purchase decision. Haire found that the respondents who described the Nescafé shopper in negative terms were unlikely to have purchased or stored instant coffee in their homes. However, women who described the Nescafé shopper in neutral or positive terms, or pardoned the fictitious shopper for using the instant coffee, were almost twice as likely to have instant coffee in their pantries (Haire, 1950). From this study, Haire (1950) suggested that unconscious motives were related to respondents' decision to purchase or not to purchase instant coffee. Thus, he concluded that projective techniques have the ability to predict consumer behavior.

Haire's pioneering shopping list study has been replicated several times since its publication in the marketing research literature (Anderson, 1978; Arndt, 1973; Fram & Cibotti, 1991; Hill, 1960, 1968; Lane & Watson, 1975; Robertson & Joselyn, 1974; Sheth, 1970; Webster & von Pechmann, 1970; Westfall, Boyd, & Campbell, 1957). The replications have addressed various issues of projective techniques including the methodology, validity, and utility in consumer behavior and marketing research.

The first replication and extension of Haire's study was conducted to further test the overall usefulness of projective techniques (Westfall et al., 1957). Westfall et al. (1957) found support for Haire's (1950) findings and concluded that informative data can be revealed by more disguised, or less overt, projective questioning. Hill (1960) reported that Haire's (1950) study was flawed because he used biased wording, improperly grouped categories, permitted the symbols to intensify negative attitudes toward Nescafé instant coffee, and had not properly weighted the responses of verbose and laconic respondents. In a second study, Hill (1968) reexamined Haire's (1950) study, replicating the basic methodology while adding a new condition to the procedure. In this replication, two grocery lists were used: (1) baking powder and instant coffee and (2) salt and instant coffee. Hill's (1968) somewhat more cautious conclusion was that one change in methodology made important differences in subjects' responses to the projective techniques. He urged researchers to exercise caution when interpreting responses induced from projective techniques.

Haire's (1950) shopping list study has also been replicated in languages other than English and in locations outside of the United States (Lane & Watson, 1975; Robertson & Joselyn, 1974). The general findings have remained consistent across international replications. The first intercontinental research effort occurred in Bergen, Norway, using a language other than English (Robertson & Joselyn, 1974). Robertson and Joselyn (1974) found that respondents tended to describe product dimensions in a similar manner to those found in the American studies, but Norwegians used more dimensions in rating the products than their American counterparts. Lane and Watson (1975) surveyed 200 respondents, 100 English-Canadian and 100 French-Canadian women, and found that respondents tended to describe the products in a relatively similar manner to those found in the American version. Lane and Watson (1975) attributed the slight variation in responses to cultural differences and changes in consumer values since Haire's (1950) research. They also concluded that references to brand names, advertising, and nutrition indicated growing consumer awareness and the importance of their characteristics and attributes. The most recent replication of the Haire (1950) shopping list study demonstrated that projective techniques remain a

reasonable and cost effective way to uncover some real-world phenomena (Fram & Cibotti, 1991). This study showed support for the resurgence of projective techniques in consumer research, utilizing the same methodology of the original shopping list study, while highlighting that the perception of Nescafé instant coffee has evolved in the past 40 years. Overall, the findings indicated that projective techniques remain a useful approach to better understand consumer sentiment.

Beyond the Haire study and its replications, there has been very little published research on projective techniques in the consumer domain. Other published studies have addressed using projective techniques to examine the meaning in gift giving (McGrath, Sherry, & Levy, 1993), to emphasize the need for marketers to make a connection with consumers (Day, 1989), and to evaluate the measurement capabilities of lifestyle typologies (Lastovicka, Murry, & Joachimsthaler, 1990). However, it is not unlikely that researchers in both academic and applied settings are using projective techniques. Small sample sizes and monetary and time commitments associated with projective techniques may have limited the proliferation of research results into the academic journals. Yet projective techniques are taught in introductory and advanced marketing research classes (Churchill & Iacobucci, 2002) and, in all likelihood, still employed with regularity in an applied setting.

Advantages of projective techniques

There are several advantages to using projective techniques, including the amount, richness, and accuracy of the information that is collected (Donoghue, 2000; Wagner, 1995). Projective techniques, when used properly, enable the researcher to access presumably unreachable beliefs, attitudes, values, motivations, personality, cognitions, and behaviors (Donoghue, 2000; Fram & Cibotti, 1991; Will et al., 1996). The nature of projective techniques is that the true purpose of the instrument is well disguised and, in most instances, the subjects are not aware of the purpose of the exercise. However, even if they are aware of the general nature of projective techniques most respondents are uncertain as to which responses are significant to the researcher or the extent of the significance. It is the sum of the responses to the projective stimuli, especially the theme that binds them together, that is of primary interest to the researcher in interpreting the data (Donoghue, 2000; Hussey & Duncombe, 1999; Seechrest et al., 1998; Will et al., 1996).

One specific advantage of using projective techniques in consumer behavior and marketing research is their utility in generating, supplementing, and verifying hypotheses. For example, researchers can use projective techniques to broaden hypotheses about consumers' purchase behaviors and the ways that they are influenced in their decision-making. These preliminary studies provide relevant information for hypothesis testing that can be verified though various methodologies such as experimentation, panel studies, and surveys.

A second advantage is that there are relatively minor cognitive demands placed on respondents when using projective techniques. For researchers, this is a substantial advantage over other measures where respondents are required to read, comprehend, and respond to the instructions. Most projective techniques are largely nonreading and nonwriting exercises; therefore, the data are not dependent on having a highly educated population. By using projective techniques, researchers have a wider scope of potential respondents compared to self-reporting or rating procedures (Donoghue, 2000). Data are not limited by cognitive ability, and the use of projective techniques enable researchers to measure the beliefs, attitudes, behavior, motivation, and personality of a subset of the population that is often neglected, but nonetheless important, in consumer research.

Disadvantages of projective techniques

The primary disadvantage of employing projective techniques is the complexity of the data; interpretation requires a sophisticated skill set. To effectively employ projective techniques, the researcher must be adept at decoding the data culled from the projective stimuli. Subjects' responses have little meaning without a methodical analysis by

researchers trained in these techniques (Donoghue, 2000). Further, there can be considerable costs to employ a skilled research staff able to interpret the responses.

A second disadvantage of using projective techniques is that it may be difficult for some respondents to fully immerse themselves in the exercise. Some respondents may not feel comfortable participating in role-playing or imaginative exercises. While some respondents may enjoy these tasks, others may participate reluctantly or even outright refuse.

Another potential disadvantage of projective techniques is the reliability of the instruments (Donoghue, 2000; Kline, 1983). Reliability refers to the general consistency of the instrument (Churchill & Iacobucci, 2002). Test-retest reliability refers to the stability with which a technique yields information over time. In certain situations, subjects' responses should remain similar and highly correlated from when they are first tested to when they are later re-tested. However, in other instances, the researcher might expect responses to be affected by situational factors (Churchill & Iacobucci, 2002; Donoghue, 2000). Test-retest reliability is contingent upon the goals of the projective research and is a consideration when using projective techniques. There is much debate about whether repeated administrations of projective techniques should correlate or differ (Donoghue, 2000). A second form of reliability is coder or interrater reliability. Interrater reliability refers to the extent to which two (or more) interpreters code the data in the same manner. If equally competent researchers interpret the data in a different manner, then doubts are cast about interrater reliability. Interpreting subjects' responses to the projective stimuli requires a high level of subjectivity on the part of the researchers, and they may disagree about the underlying meanings of responses. Thus, interrater reliability is one of the major issues of using projective techniques and is often the target of criticism (Churchill, 1991).

Conclusion

Research on marketing and consumer behavior has often focused on the measurement of attitudes (Churchill & Iacobucci, 2002) because attitudes have been perceived as powerful determinants of behavior (Allport, 1935). In general, marketers believe that when someone has a favorable attitude toward a particular product, he or she will be more likely to purchase this product. However, straightforward questioning techniques, or explicit attitude measures, typically have been employed to assess these attitudes. Consumer researchers have stressed the importance of using other types of measures in consumer behavior. One such measure is the projective technique. Projective techniques are fundamental to consumer researchers—academics and practitioners alike—involved in qualitative data collection methods. They are mainly used for answering "how", "why", and "what" questions in consumer behavior. Projective techniques can provide a depth of understanding of what people truly think and feel about a consumer object. Projective techniques have been in the psychological lexicon for many years, and the strengths and weaknesses of this technique have been clearly outlined. However, there is a need for further research, analysis, and discussion in this area. When used properly, as well as in conjunction with other methods, projective techniques have the ability to illuminate unique aspects of the consumer experience. As such, researchers should continue to examine the utility of projective techniques in the consumer domain.

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