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## “Before alone or (well) accompanied”? The Use of Projective Marketing Techniques

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### Abstract

Projective techniques, widely used in marketing research, encourage interviewees to talk about other people so that researchers can discover deep feelings and circumvent psychological prejudices. The present study analyzes empirical publications that involve the use of projective techniques in marketing. For this, two specific objectives were defined: to analyze if the publications are using only projective techniques or are being combined with other techniques and to identify which types of projective techniques are being used. The results were divided into bibliographic analysis and semantic analysis. In the first one, the evolution of the publications per year and the periodicals that most published articles using projective marketing research techniques, as *Qualitative Market Research* and the *International Journal of Market Research*, are presented. In the second, a qualitative analysis was performed, observing that half of the publications used only projective techniques while the other part combined with other data collection techniques such as interviews, focus groups, case studies and quantitative studies. The types of projective techniques more frequently employed were word association, sentence completion, Haire’s shopping list, thematic perception test, collages, drawings, scenarios, and third-person technique.

### Keywords

Projective Techniques, Qualitative Research, Marketing.

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## “Before alone or (well) accompanied”? The Use of Projective Marketing Techniques

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### Introduction

The idea of asking about other people rather than about themselves, both in marketing research and in other areas, in order to discover deep feelings and to circumvent psychological prejudices has been used for many years (Aitchison, 2018). This technique allows the interviewee to project into another and thus reveal their thoughts. Projective techniques use stimuli, such as pictures or stories, visual or verbal, so that values, ideas, thoughts and feelings could be achieved with greater detail and in a lighter and easier way than in other more direct methods. These stimuli facilitate the breakdown of communication barriers and enable individuals to end up delivering their views on the topics covered, being possible to reach the opinions and perceptions that are in the subconscious.

Projective techniques bring benefits in situations where it is difficult for respondents to express themselves with direct questions (Shafiq, Haque, Abdullah, & Jan, 2017), facilitating the achievement of behaviors, personalities and deeper beliefs. They are often used to analyze how individuals justify their choices. Therefore, the use of multiple techniques, using the projective techniques together with others, are of great value to expose their motivations (Font & Hindley, 2017).

The motivation for this research is due to the absence of studies that compile the main projective techniques that are being used in marketing research and how they have been used. Many researchers do not have the knowledge of their types, as well as the possibility of

combining projective techniques with other data collection techniques. Authors such as Malhotra (2001) and de Lima, Medeiros, Machado, and Passador (2017) claim that multi-method searches can assist the analysis of results from different angles. Thus, in order to contribute to science and academia, this study approaches the different types of projective techniques used in marketing, which are of great relevance both for this area and for several others.

This study was carried out with the objective of analyzing empirical publications that involve the use of projective techniques in marketing research. For this, two specific objectives were drawn: to analyze if the publications are using only projective techniques or are being combined with other techniques and to identify what types of projective techniques are being used. The intention is to offer an analysis of recent scholarly literature in the field of marketing research that has employed projective techniques, encouraging the advancement of research and the use of technique that is especially relevant to complex themes such as personality, values, feelings and even the subconscious.

### **Theoretical Reference**

The concept of projection had its origin with Freud (1911), as a mechanism in which individuals unconsciously attribute their traits and also their negative personality impulses to others, thus revealing their own thoughts and opinions (Lilienfeld, Wood, & Garb, 2000). On the other hand, the term “projective techniques” had its origin in Frank’s article (1939), “Projective Methods for the Study of Personality” (Soley, 2010). In it, the author argues that projective techniques are necessary for individuals to show how they organize their experiences, having a stimulus for them to project their lives, their thoughts and feelings. Thus, from the technique it is possible to see how the personality of the individual is organized (Frank, 1939). It can be used in a variety of research situations and are very useful for dealing with and accessing subjects where participants have difficulty expressing their opinions (Boddy, 2005).

The first publication involving projective techniques was developed by Haire (1950) in the article “Projective techniques in marketing research,” in which such technique is useful to increase hypotheses about consumer behavior (Pinto et al., 2018). When the interviewer gets closer to consumers questioning their reactions about a particular product, false and misleading responses containing blockades, clichés and stereotypes are very common. Often the individual keeps his answers in what is socially acceptable. There are cases where the respondents do not like to discuss explicitly and may be a moment of pressure. This causes him to keep his answers in an acceptable pattern, not representing his true thoughts, believing that they do not make much sense, are not logical or are not receptive in the social environment. If the individual puts his true thoughts into the interview, he may feel foolish and the researcher may insist, not finishing the interview until he understands them. It is much easier to reproduce a cliché and get rid of the interviewer (Haire, 1950).

Projective techniques are used constantly in market research in which respondents tend to be resistant or even unable to expose what they feel and what they think about a given object or subject, making it easier to acquire information through this technique than from others in which direct questions are used (Boddy, 2005).

According to Ramsey, Ibbotson, Bell, and Gray (2004), projective techniques can be considered exercises for human subjectivity, encouraging the spontaneity and freedom of expression of individuals, thus discovering their feelings, perceptions and opinions. This technique facilitates the connection of thoughts that are repressed or hidden and allows participants to respond more comfortably than in other techniques because they project their own feelings or thoughts through the stimuli they receive (Boddy, 2005). The interviewee may

be unable to describe in a direct response their opinions. Using stimuli and letting them make sense through the respondent's opinions and experiences can be a painless way of getting information about the person (Haire, 1950).

Donoghue (2000) considers that the more unstructured a stimulus is, the more the individuals will project their emotions, attitudes, values, and reasons. Soley (2010) points out the existence of an unconscious in humans. And, no matter how critical, projective techniques are more efficient and reliable than positivist tools for achieving it.

Although they have many advantages, projective techniques present their own disadvantages, such as the risk of subjectivity in the interpretation, the need for trained interviewers and interpreters prepared to perform the analyzes (de Lima, et al., 2017). Without a cautious evaluation by the researchers, the answers acquired through the projective techniques have little meaning, being necessary abilities due to the complexity of the data. This is an aspect of the technique that is criticized (Donoghue, 2000). The researcher must take care not to let their own perceptions be revealed, ensuring that the results generated by the application of the projective techniques reflect the participant's opinions.

To avoid mistakes and even mitigate these disadvantages, Malhotra (2001) suggests that projective techniques should be used in conjunction with other techniques, with a comparison of the results, thus allowing more reliable conclusions. De Lima, Medeiros, Machado, and Passador (2017) affirm that projective techniques are increasingly seen as part of multi-method research, being tools that help in the analysis of results from different angles. It is assumed that they can be effective in revealing motivations, feelings and beliefs that are very difficult to achieve through other techniques, such as questionnaires or structured interviews. Therefore, they serve as a good complement to other data collection techniques.

The authors of this article are three master students and two professors from a Federal University in Brazil. All them have great interest in qualitative research and seek to study and understand more about the data collection techniques employed in this type of study. During a discussion held in a Qualitative Marketing Research Techniques class, it was pointed out the need for a study that addressed the importance of projective techniques and that analyzed how they are being used in marketing. Thus, the authors began this work in order to collaborate and encourage researchers to know and use this technique.

## Methodology

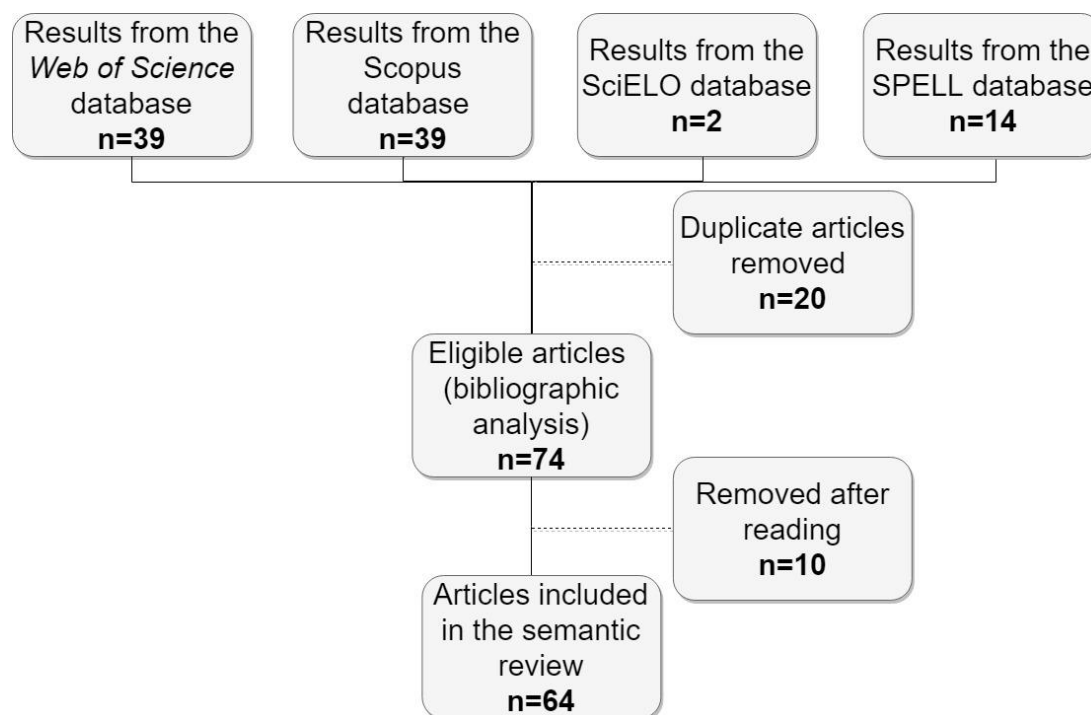
To achieve the proposed objective in this article, we performed a systematic review, a type of research that has the literature on a given topic as a data source. In this way, the systematic review of the literature has great relevance to integrate the knowledge and ideas present in several research studies performed separately on a subject, helping to guide future research (Sampaio, 2007). According to Zupic and Cater (2015), synthesizing the findings of previous research is an initiative of great importance for the evolution of a specific line of research.

This section presents the methodological design of this research, which was performed through four phases: (1) search and selection procedures; (2) selection criteria; (3) descriptive analysis of articles; (4) semantic analysis of the data.

The **search and selection procedure** occurred on November 26, 2018, being carried out in the international databases, Scopus and Web of Science, and national databases, SPELL and SciELO, large repositories of documents. The search in the international databases included the terms "projective \* \_technique \*" and "marketing," using the search for topics, which include the title, abstract and keywords. In the national ones, the terms used were in Portuguese "técnica projetiva" or "técnicas projetivas" and "marketing," being in SciELO using the search for all indexes and in SPELL by the abstract, seeking a greater guarantee that

the publications found were focused in the use of projective techniques in marketing research. Boolean operators, as well as other types of operators, were used as a way to better refine the research.

Regarding the **selection criteria**, the following procedures were performed: (i) only articles were selected; (ii) removed 20 duplicated articles; and (iii) 10 articles were excluded after reading them because they did not correspond to the scope of the research or because they were not found for analysis. Thus, 74 articles were selected for the bibliographical analysis and 64 for the semantic analysis, as shown in figure 1. No year limitations were placed, accessing all available publications.



**Figure 1.** Selection of articles from the Web of Science, Scopus, SciELO and SPELL databases. Source: Prepared by the authors.

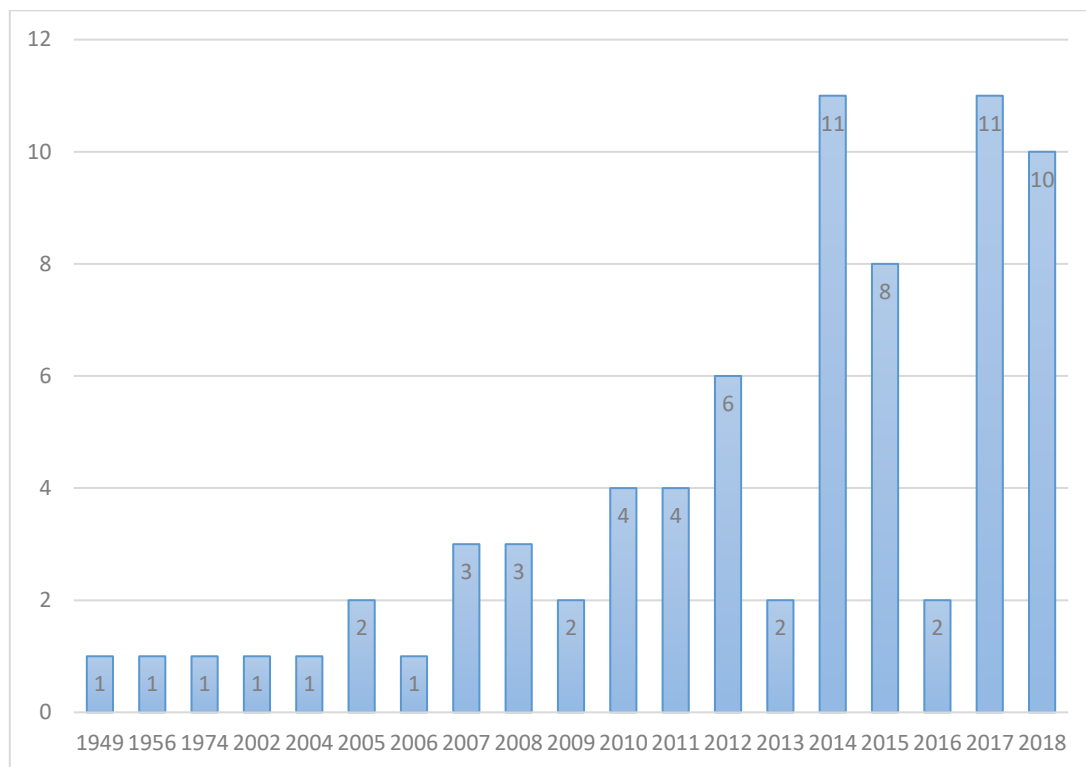
The third phase comprised the **bibliographical analysis** of the articles, as a way of characterizing the publications examined. For this, the 74 articles found in the four databases were carefully read, tabulated in a spreadsheet and systematized according to the following characteristics: (i) evolution of publications over the years and (ii) periodicals that published the most. The last phase presents the **semantic analysis**, in which a qualitative analysis of the articles was carried out, investigating: (i) whether only projective techniques were used or accompanied by other (s) and (ii) types of projective techniques.

## Results

### Bibliographic Analysis

This section presents an overview of the studies that were selected for the analysis. In figure 2, it is possible to see the total number of articles found before the reading and the withdrawal of those that do not fit the research goal. With respect to the 74 articles, it can be verified that there was a considerable increase in the publications that involve projective techniques in researches in the marketing area, due to the increased interest in the subject and

also probably the proliferation of journals. Only 2014, 2015, 2017 and 2018 have 54% of the analyzed publications, demonstrating that the use of the technique is growing and, therefore, it is necessary to look at the subject.



**Figure 2.** Evolution of publications per year. Source: Prepared by the authors.

According to the most published journals on the subject, as can be seen in Table 1, it is possible to see a highlight for the journals *Qualitative Market Research* and *International Journal of Market Research*, with 9 and 6 publications respectively. These two journals have 20% of the publications in the field of marketing research that use projective techniques.

**Table 1.** Periodicals with higher frequency of publications

Journal	Article title	Authors	Year
<i>Qualitative Market Research</i> (ISSN: 1352-2752)	How memorable experiences influence brand preference	Stach, J.	2017
	Understanding meaning transfer in celebrity endorsements: a qualitative exploration	Jain, V; Roy, S.	2016
	Qualitative projective techniques in political brand image research from the perspective of young adults	Pich, C.; Dean, D.	2015
	Reshaping the Village Test for investigating service brand attachment	Mzahi, C.	2014
	One step closer to the field: visual methods in marketing and consumer research	Shin Rohani, L.; Aung, M.; Rohani, K.	

	The Multi-Sensory Sort (MuSeS): A new projective technique to investigate and improve the brand image	Cian, L; Cervai, S.	2011
	Exploring consumers' reactions towards innovative mobile services	Broeckelmann, P.	2010
	Mining deeper meaning in consumer decision maps	Mulvey, M.S.; Kavalam, B.E.	
	Tasting as a projective technique	Pettigrew, S.; Charters, S.	2008
<i>International Journal of Market Research</i> (ISSN: 1470-7853)	Mind-reading a friend: A better way to ask the polling question?	Aitchison, J.	2018
	Investigating political brand reputation with qualitative projective techniques from the perspective of young adults	Pich, C.; Armannsdottir, G.; Spry, L.	
	The influence of Bill Schlackman on qualitative research	Patterson, S.; Malpass, F.	2015
	The elicitation capabilities of qualitative projective techniques in political brand image research	Pich, C.; Armannsdottir, G.; Dean, D.	
	Application of projective techniques in an e-business research context - A response to 'Projective techniques in market research - valueless subjectivity or insightful reality?'	Ramsey, E.; Ibbotson, P.; McCole, P.	2006
	Projective techniques in market research: valueless subjectivity or insightful reality? A look at the evidence for the usefulness, reliability and validity of projective techniques in market research	Boddy, C	2005

Source: Prepared by the authors.

The journal *Qualitative Market Research* focuses on broadening the understanding of qualitative market research, and articles can use a variety of interdisciplinary applications. It receives articles that use qualitative methodologies covering the entire marketing area, such as consumer behavior, marketing strategies, services, online marketing, and social marketing. The *International Journal of Market Research* focuses on market research, applications of new research approaches, new tools and techniques. He publishes articles throughout the field of marketing and social research as well as new quantitative and qualitative techniques.

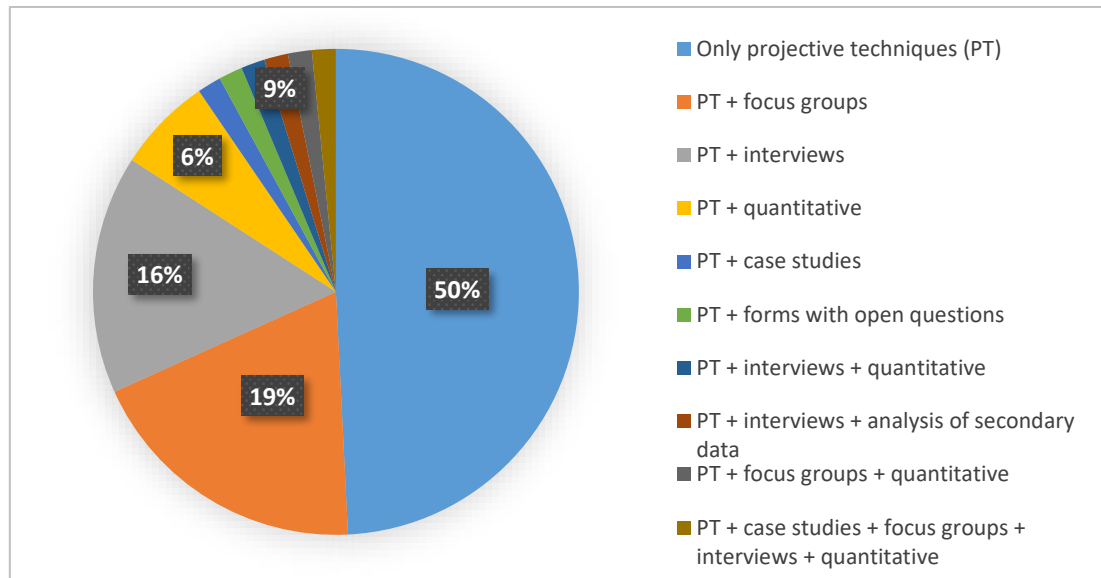
### Semantical Analysis

After reading the 74 articles, ten were not found or did not fit the objective of the research because they did not use the technique or because they were theoretical articles, being thus removed from the analysis. The semantic analysis then occurred with the remaining 64 articles after reading. In this topic will be presented if the projective techniques were used as the only form of data collection or were combined with others. Furthermore, will be approached the types of projective techniques employed.



### *The use of projective techniques and other technique(s)*

In view of the first specific objective, the publications were analyzed observing whether only projective techniques were used or were combined with other techniques, as shown in figure 3.



**Figure 3.** Use of only projective techniques or combined with other techniques.

Source: Prepared by the authors.

As can be seen, in 50% of the publications, projective techniques were solely used as a means of collecting data. In the others, other techniques were employed. Nineteen percent combined projective techniques with focus groups, 16% with interviews, 6% with quantitative studies, and a further 9% who also used case studies, open question forms, interview and quantitative studies, interviews and analysis of secondary data, focus groups and quantitative studies, and, finally, employing several techniques besides the projective techniques: case studies, focal groups, interviews and quantitative studies.

Half of the publications combined the use of projective techniques with others. This was pointed out by de Lima, Medeiros, Machado, and Passador (2017), Font and Hindley (2017), and Malhotra (2001) as a way to avoid mistakes and also to mitigate the disadvantages of projective techniques, thus being able to compare results, reaching more reliable conclusions.

### *Types of projective techniques used*

To meet the second specific objective, the types of projective techniques that are being used in the analyzed publications were identified. Before that, it was found if those using only projective techniques made use of only one type or more. Half of the publications employed only one type while the other half used two or more types of projective techniques, another way to avoid mistakes and also compare results beyond the use of more than one technique as it was put on the topic above.

In table 2, the types of projective techniques found most frequently in publications are presented, such as word association, sentence completion, Haire's shopping list, thematic perception test, collages, drawings, scenarios and the technique of the third person.

**Table 2.** Types of projective techniques more frequent in publications.

<b>Type of Projective Technique</b>	<b>Description</b>	<b>Authors who worked on the technique</b>
<b>Word Association</b>	A methodology in which the consumer is asked to present the first words that come to his mind when presented to a stimulus. These first associations are considered one of the most relevant for consumer perception (Pacheco et al., 2018).	Almeida & Medeiros (2017); Eldesouky, Pulido, & Mesias (2015); Esmerino et al. (2017); Gámbaro, Parente, Roascio, & Boimbaser, (2014); Grougiou & Pettigrew (2011); Harrigan, Ramsey, & Ibbotson (2012); Jain & Roy (2016); Pacheco et al. (2018); Paiva, Santos, de Mendonça, & Melo, (2014); Pich, Armannsdottir, & Dean (2015); Pinto et al. (2018); Ramsey, Ibbotson & McCole (2006); Shafiq et al. (2017); Soares et al. (2017); Vaca & Mesías, (2014); Viana, dos Santos Silva, & Trindade (2014); Vidal, Ares, & Giménez (2013); Wassler & Hung (2015).
<b>Sentence completion</b>	It is one of the projective techniques most used in market research. In it, respondents are asked to conclude the incomplete sentences with the first words that come to mind at the time of the response. The stimuli given may be phrases, stories, or conversations, with participants having to complete them in their own words (Elghannam, Arroyo, Eldesouky, & Mesias, 2018). It can also happen with the interviewee writing on the balloons what the subject of the image is thinking (Doherty & Nelson, 2008).	Beck & Pereira (2012); Broeckelmann (2010); de Carlo Canali, Pritchard, & Morgan, (2009); Chhabra (2012); Doherty & Nelson (2008); Eldesouky et al. (2015); Elghannam et al. (2018); Groeppel-Klein & Koenigstorfer (2007); Grougiou & Pettigrew (2011); Harrigan, et al. (2012); Japutra, Ekinici, & Simkin (2014); Kujala, Walsh, Nurkka, & Crisan, (2014); Pich, Armannsdottir, & Dean (2015); Ramsey, Ibbotson, & McCole (2006); Roascio-Albistur & Gámbaro (2018); Sass et al. (2018); Tussyadiah & Wang (2016); Vaca & Mesías, (2014); Vidal, Ares, & Giménez (2013); Wassler & Hung (2015); Zober (1956).
<b>Haire's shopping list</b>	Participants are invited to read a list and asked to provide a brief description, in a blank space provided with words and / or phrases, about the buyer profile of the list (Pinto et al., 2018). Consumers are asked to describe people using shopping lists.	Pinto et al. (2018); Vidal, Ares, & Giménez (2013).

	This type of study is useful to better understand consumer behavior (Vidal, Ares, & Giménez, 2013).	
<b>Thematic perception test</b>	A series of images can be used, and the participant is asked to make up stories about them. What each individual sees in the pictures says something about themselves and reveals their personality (Boddy, 2004). These images can be illustrations of magazines, drawings, paintings or others. The interviewee is asked to create stories around them and this ends up describing their thoughts and feelings (Zober, 1956). Stories can be placed without the end being exposed, asking the participant how the situation occurred from that moment on (Hemais & Casotti, 2014).	Boddy (2004); Hemais & Casotti (2014); Little & Singh (2014); Zober (1956).
<b>Collage</b>	Participants are called to gather random images. The collage technique stimulates non-verbal and also verbal activity when questioned about the meaning (Font & Hindley, 2017). It seeks to discover how consumers think and feel about a particular topic (Yam, Russell-Bennett, Foth, & Mulcahy, 2017).	Cherrier (2012); Font & Hindley (2017); Hindley & Font (2017); Kubacki & Siemieniako (2011); Yam et al. (2017).
<b>Drawing</b>	The participants are asked to draw up a drawing. They can be in three ways: free, guided or guided design. The free drawing is characterized by the absence of instructions, there is no time restriction. It is allowed to follow your own preferences. In guided design, there are structured instructions to guide the participant, but they are flexible. But in the guided design, the instructions are specific and need to be clearly understood (Ezan, Gollety, & Hémar-Nicolas, 2015).	Ezan et al. (2015); Pich, Armansdottir, & Dean (2015); Pinhal, de Souza Ferreira, & Borges (2018); Yam et al. (2017).
<b>Scenarios</b>	Scenarios help to determine how the participants make their decisions considering certain situations and may involve ethical issues. Respondents are assessed by agreement or disagreement with certain statements (Font & Hindley, 2017).	Fonseca, Gonçalves, de Oliveira, & Tinoco, (2008); Font & Hindley (2017); Hindley & Font (2017).

<b>Third-person technique</b>	This technique helps to free participants from the ego. The respondents are questioned about what third parties would do in a given situation, and thereby, expose their own views and intentions without admitting (Aitchison, 2018).	Aitchison (2018); Fontes, Borelli, & Casotti (2012).
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Source: Prepared by the authors.

The most used projective techniques were the Sentences Conclusion, used in 21 articles and the Association of words, applied in 18 publications. Recalling that in the articles analyzed in this review there are those who used more than one projective technique, appearing in more than one type in the above table.

### Final Considerations

With a focus on collaborating with the studies using projective techniques, this research aimed to perform a systematic review of the literature analyzing empirical focus publications that involve the use of the projective techniques in marketing researches, summarizing ideas and discoveries of previous articles. Two specific objectives were set out.

The first is to analyze whether the publications are using only projective techniques or are being combined with other techniques. Fifty percent of the analyzed articles used only projective techniques while the other half also used other data collection techniques, being these interviews, focus groups, case studies and quantitative studies. The vast majority of studies use projective techniques in conjunction with other methods. The authors state that when used together, they make a consistent and valuable contribution to the interpretation of the results. Some cases use projective techniques after other methods, such as questionnaires, which enable a macro view, seeking more details of the researched subject, and after the focus group claiming to remove the social desirability bias that may occur in this method. In addition, Kujala et al. (2014) state that, compared to the interview, the results take less time to analyze and in relation to quantitative methods, they yield more information.

The second objective was to identify what types of projective techniques are being used in the studies. The most frequent appearances were word association and sentence completion, probably because they were the best known, followed by Haire shopping list, thematic perception test, collages, drawings, scenarios, and third-person technique. A table was built about each type, how they are performed and also showing interesting aspects of the projective techniques. Most of the studies are in English.

The use of projective techniques allows respondents to express themselves in a less inhibited and intrusive manner and in greater detail compared to techniques that use direct questioning. They can also be used as ice breaks to make the interviewee more comfortable, strengthening the relationship between the interviewee and the researcher and in combination with other techniques. This study showed that many authors use only projective techniques and others add other techniques of data collection. It is up to the researcher to analyze what best fits with the objectives of his study and may also be the use of more than one type of projective technique.

Moreover, this research still seems to point to the fragmentation of the technique even within the marketing area, mainly by the use of varied types, as well as by the non-congruence of the research method that best aligns with it. The projective technique is an approach that was developed to complement other techniques and to understand a phenomenon more deeply, however we argue that they are not all the research objectives or even, they are not all the research methodologies that fit the use of the technique. It is suggested that authors who wish

to venture into the use of projective techniques should be concerned with the precise delimitation of the object of study and with the methodological approach needed to answer research questions. This technique is not limited to the field of marketing. During our research, we found several articles in areas of business, management, accounting, agricultural and biological sciences, computer science, medicine, neuroscience, nursing and other health areas, food science technology, tourism and others. Therefore, there are several opportunities for study using projective techniques. What authors should be aware of is the adequacy of the method to what is intended to be researched.

Particularly, it is believed that, as was pointed out by Malhotra (2001) and de Lima, Medeiros, Machado, and Passador (2017), the projective research technique is a tool that complements other research techniques, mainly directed to qualitative research approaches, or as a qualitative complement to a quantitative study.

The suggestions of future researches presented in the articles of the last year (2018) were analyzed and from this analysis were examined if there were proposals related to the use of the projective techniques. Aitchison (2018) suggests that the authenticity of the approach can be enhanced when combined with researchers' weighting models, and the technique deserves greater consideration in quantitative market research. According to our research, the country with the most publications involving projective techniques is the United Kingdom, followed by Australia, the United States, and Brazil. Other countries also feature publications such as France, Uruguay, Germany, Spain, Italy, Poland, among others, but in very low numbers. Almeida (2018) invites researchers to deepen their understanding and also in the empirical application of projective techniques, a technique rarely explored in Brazil yet. In addition, it proposes to conduct multidisciplinary research involving professionals from the Administration, Psychology, Sociology, Anthropology and other areas, having a greater understanding of the different consumers in Brazil, a country so diverse.

This research had as limitations the use of articles published only in periodicals. Although this is common in reviews, books and articles published in Annals of Congresses could also bring relevant information. As this research was carried out with the purpose of analyzing the use of projective techniques in marketing, it is suggested to perform a study similar to this one with other areas. This study contributes an analysis of how studies are being performed with projective techniques, their types and advantages. It is intended to collaborate with the advancement of studies with this technique so relevant to reach thoughts and opinions that participants may resist sharing with the use of other data collection methods.

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