

# Fundamentals of Personality Type

## APTi Webinar Series October–November 2013

**Peter Geyer**

Melbourne, Australia  
[peter@petergeyer.com.au](mailto:peter@petergeyer.com.au)

### 5. Why are there type questionnaires and what do they do?

#### Why Measure Type?

*Personality Type* or, more specifically, *Psychological Type* (take your pick) are theories about individual personality. They aren't derived from measurement, unlike trait constructs e.g. the Big 5 or Five Factor Model, nor do they depend on it. Yet the way that they are usually encountered is via measurement.

Some people think that a type questionnaire either is or should be a complete representation of the relevant theory or ideas and examine it on that basis. In doing so, they may not examine closely the presuppositions and rationale of its developers and may think only of measurement methods and discount anything else.

#### Measurement, Questionnaires and Personality

Measurement as a method was a feature of attempts in the late 19th and early 20th Centuries to establish psychology as a science. "Science" in this case had a narrower meaning than it had in previous decades and centuries. The benchmark was physics and the presumption was that the methods of physics could be fruitfully applied to psychological questions and that this was the only way that psychology could be termed a science, rather than its traditional location within the field of philosophy.

This particular movement can be said to have originated with the work of Francis Galton, a cousin of Charles Darwin. His focus was on heritable characteristics. He was the founder of what became the eugenics movement, which aimed to increase the survival of particular attributes of human beings and minimise others.

Wilhelm Wundt's experimental focus, and German psychology in general were major influences in the development of American psychology. Jung's Word Association experiments were in that respect a part of German psychology.

Questionnaires, usually called tests, developed in significance from the early part of the 20th Century. Initially they were about intelligence e.g. the Stanford-Binet which followed Galton's eugenically-based ideas, Binet's original ideas weren't represented as well as they might in this test. Other tests were developed, with a psychopathological orientation, focusing on behaviours such as work habits and learning disorders.

The idea of measurable traits was introduced around the 1920s, and not initially readily accepted, although it's the default approach today. Personality traits were later considered to be lexically-based i.e. identified with adjectives and adverbs culled from a dictionary. This is still considered contentions by some, although it's the accepted view.

A key presumption of personality measurement was that people could respond meaningfully to questions presented in a self-report format. How meaningful this might be is still a contested topic. At any rate, type measurement of any kind was unsuccessful prior to World War II, and this generally reflected the unruly nature of personality measurement as a whole, which was largely unregulated and poorly defined. Some of these issues continued on to more recent times and can be manifest still in the dubious nature of online and book situated questionnaires.

## Measuring Jung's Typology

The *Jungian Type Survey* and *Briggs-Myers Type Indicator* began development in 1941 and 1942 respectively and appear to be the first questionnaires to tackle the whole of Jung's typology. Efforts had previously been directed to extraversion and introversion only, and essentially as traits. Guilford and Bernreuter were among the most successful in this way, several extraversion-introversion questionnaires appeared that were contradictory in definition, or unreliable.

It seems that measurement of Jung's typology was something that both Briggs and Myers, as well-educated middle-class citizens, expected others to do as a matter of course. When that didn't happen and after Isabel Myers' own experience using the *Humm-Wadsworth Temperament Scale* in an organisation where the relevant manager was a family friend, Edward Hay, they decided to do it themselves. It's to be noted here that Hay later developed a job classification system that is still widely used today, and bears his name.

Myers and Briggs presumed that developing a questionnaire was the best way to help people through type knowledge and self knowledge, as well as job-fit. Their cultural presumptions about measurement were not shared by Jung. He was wary of classification, thinking it missed the point about his typology. It's unknown what he thought of the *Jungian Type Survey*, given the developers included two of his analysands. Isabel Myers sent Jung the BMTI. What he thought of it, if anything, is the subject of a minor debate that surfaces from time to time.

In the developing field of psychology, the US and the UK had the greatest emphasis on measurement by questionnaire, although it appears less pervasive in the UK. Essentially it might be considered an approach favoured by English language nations, or Anglophone societies, with a common philosophical perspective of the empiricism of philosophers such as John Locke and David Hume. Measurement was also influential in "scientific management" circles around the same time as *Psychological Types* made its appearance.

Other cultures have taken this perspective up relatively recently, even in Places like Australia where an encounter with the MBTI in the 1980s and early 1990s in particular was likely to be the first time a person had encountered a personality questionnaire at all. The world of batteries of instruments was unfamiliar to type users as a rule, which confused some visiting type experts from the US. In Europe and elsewhere the rise of measurement in organisations has coincided with the spread of American business methods as the corporate and global economy expanded.

### Measurement Ideas and Who Owns Them

Measurement ideas have traditionally been in the public domain. When people tried to measure Jung's extraversion and introversion in the 1920s and 30s, they didn't ask his permission, nor did he think that his ideas were owned by him in the copyright sense. From this early period until the present day, measurement researchers have appropriated or swapped items from others' work, as a matter of course. A presumption here is that an item means the same thing in different contexts.

Clarence Myers, Isabel Myers' husband and a lawyer, copyrighted her work in 1943, which seems an appropriate thing to do out of loyalty. This copyright has been adapted and renewed ever since. It makes MBTI items unusual in that their appropriation is resisted and there are legal sanctions applied to their appropriation, as well as the claim of being MBTI, a problem initially for the Humanmetrics online questionnaire, for instance.

In addition, those developing type questionnaires, or providing a brief questionnaire in a book or other publication have invariably met with legal challenges from MBTI copyright owners or their representatives. This process has also led to the reframing of MBTI as an adjective or adverb i.e. *assessment* or *tool*, which distracts from Isabel Myers key word *Indicator* as a representation of what her questionnaire is all about.

Scoring methods i.e. prediction ratio, cluster analysis, factor analysis or Item Response Theory appear to be in the public domain. Sometimes it appears that the method is privileged over the content and purpose of the items.

### **Type Questionnaires**

Type questionnaires are simply any set of questions that claim to identify Jung's types. They are usually not directly identified as "Tests" even though they fit into that technical category. Isabel Myers, Mary McCaulley and other early MBTI users used the term *Indicator* for that reason, as it wasn't assessing or testing anyone and the scores were not the focus of the instrument. Some other type questionnaires also use this term. Other terms used, such as *Inventory*, *Profile* and *Survey* are simply generic i.e. used by non-type questionnaires; sometimes their possible meaning may not be examined before being applied to type constructs.

Most of these questionnaires use the BMTI/MBTI four scales/dichotomies/dimensions as a base. Whether this can be seen as a violation of copyright is contentious, although it would be expected to be in the public domain, being derived from Jung's constructs. Exceptions include the *Jungian Type Survey* and *Singer-Loomis* and questionnaires focusing on what are called Jung's function-attitudes such as *FASDI* and *MTRI*.

What follows are brief descriptions of some type questionnaires

#### **The Gray–Wheelwrights Jungian Type Survey**

The *Jungian Type Survey* is commonly known as the *Gray-Wheelwrights*, after its authors. Horace Gray was a medical doctor; Joseph and Jane Wheelwright were Jungian analysts based in San Francisco who were analysed in Zurich by Jung and his immediate circle. Their individual and collective work appeared in journals such as the *Stanford Medical Bulletin* and the *Journal of General Psychology* around the mid-1940s.

Still in use today, after many revisions and some later attempts at validation, it doesn't appear to have had a wide circulation, although it appears to be the most commonly mentioned questionnaire in Jungian professional publications over the decades. Type and type questionnaires don't appear to be a major interest for this group.

*Survey* items are of unspecified origin, usually requiring *a* or *b* responses, with some questions requiring *yes-no*. The dominant or superior function is the highest score the results can be interpreted in a simple diagram identifying the conscious and unconscious. The process of identifying the dominant function in this manner can have consequences for type dynamics interpretations when compared with the Myers-Briggs Type Indicator.

#### **Myers–Briggs Type Indicator**

Initially the Briggs-Myers Type Indicator, its initial focus was on the workplace. Its construction was based on almost two decades of observation, study and discussion, mostly in a family context. The questionnaire itself was a family project and funded accordingly.

Its items were apparently derived from Jung's text, which had been scoured diligently sentence by sentence by Katharine Briggs. There were also items contributed by family members. Other instruments were not consulted due to their pathological bias, as the BMTI/MBTI was intended to be about normal personality.

Items were initially phrase questions with mostly an *a* and *b* option. Myers eschewed true-false as an option because she learned that some people liked to predominantly answer either way regardless of the content of the item. Some items were not scored for type and later became known as Level II questions.

Isabel Myers wrote supporting documentation for her ideas at this time, explaining Jung's theory as she understood it and the rationale for a scale to indicate to the extraverted function and a related type formula or code.

This decision was based on the earlier research work of Katharine Briggs, who had developed her own personality framework prior to reading Jung. Also influential was the pragmatic desire to address the practical issue of observable behaviour.

The result was 16 types rather than Jung's 8 and J-P becoming a default scale for other type questionnaires as well as a possible influence for trait questionnaire developers many years later. Myers appears also to have introduced the term "preferences" perhaps taken from measurement literature.

Private agreements for the Indicator's use were made with Edward Hay and Donald Mackinnon in the 1940s and with Takeshi Ohsawa in the late 1960s.

An agreement with *Educational Testing Service* (ETS) in the mid-1950s enabled further MBTI development. notably word-pairs, more Level II items and a decision relating to equal scores that enabled the elimination of X results as well as a coherent Type Table format.

Notwithstanding the production of a manual (1962) the Indicator was considered a research instrument throughout the agreement with ETS..

*Consulting Psychologists Press* (CPP) became the MBTI publisher in 1975, after ETS decided not to continue with it. CPP made the MBTI publicly available.

Scoring methods for the MBTI have varied over time. Initially, one point was allocated for each question. Later there occurs allocation of 0, 1, or 2 points according to how effective the item was as a discriminator.

There was also separate scoring for males and females regarding the T-F scale; Myers had originally conducted her research separately on females for all her scales, and found differences on the T-F scale. Scale items were also divided into clusters, with various themes identified.

*Factor Analysis*, a method initially developed in the 1920s, was used for the post-Myers Forms J and K, using her available items and one or two additions and *Item Response Theory* for Forms M and Q. The latter method and revision of items enabled the elimination of separate T-F scoring for males and females, although this naturally didn't affect the different percentages of males and females for these items.

The current MBTI revision is utilising the *Latent Class Analysis* method.

### **Keirsey Temperament Sorter**

The Sorter appeared with David Keirsey and Marilyn Bates' book *Please Understand Me* in 1978. It was not intended to be a rigorously tested psychological assessment such as Myers and Briggs intended with their work and in fact Keirsey made the questionnaire up in a couple of weeks as a means of helping the book sell. He did not, in any case, believe the psyche could be quantified

Its theoretical basis was not Jungian, but ideas relating to systems theory, constitutional psychology and several German thinkers. Isabel Myers MBTI work was included in the mix, as Keirsey found her descriptions fitted in with his own research, which was philological in orientation.

Theoretically, he denied the existence of extraversion-introversion, although his later breakdowns of his four temperaments incorporated that construct, so that there were four sub-types for each temperament. This facilitated the use of MBTI-focused material and the counter-use of temperament materials.

The book-published questionnaire contained 70 items, phrases and word pairs, using the same category opposites as the MBTI.

Although not Keirsey's interest, there were later attempts at reliability and validity. Even before this time, it had been used in serious research attempts, which may be a comment on how some researchers see questionnaires of any kind.

In training rooms and similar environments, the *Sorter* became used as a "self-awareness" tool. Its ease of use, no purchase qualifications and the lack of a need to justify the results were important factors in its popularity. Other type focused questionnaires were also used in this way, such as the *Hogan-Champagne* and *Honey-Mumford*, as well as card sorts.

The *Sorter* has been available online for many years. It is confused by some with the MBTI, as well as being Jungian in orientation.

### **Singer–Loomis Inventory of Personality**

Known also as the SLIP, this questionnaire was developed in the 1980s by two Jungian analysts, June Singer and Mary Loomis. A fundamental presumption for them was that the statistical methods of academic psychology should be applied directly to Jungian ideas, perhaps unaware that these methods rested on a particular view of human beings quite different to that of Jung. It was also a different view to Isabel Myers, who chose a specific method compatible with how she understood Jung's typology.

Singer and Loomis also questioned Jung's idea of bipolar opposites and the opposites of dominant and inferior, making comments about the Gray-Wheelwrights and the MBTI in that context.

The questionnaire focused on the basic functions and introversion-extraversion, with J-P style nomenclature related only to the dominant function. The outcome was expressed in Jung's 8 types, seen as *cognitive* processes and presented as a *cognitive* profile, adapting the term from information processing.

SLIP questions, or statements were organised under situations which specify "an internal affective state" with 8 questions to each situation and 15 situations. Scoring is via a 5-point Likert scale. The situations, which seem to be more about behaviours than type, read as culturally narrow, perhaps aimed at an educated American middle-class and the affect context seems at odds with Jung's expressed views about affects.

How much use has been made of the Singer-Loomis, or its influence, is unclear.

### **Golden Personality Type Profiler**

John Golden, the author of the PTP, has a long history of association with type and type measurement. His father, Ed, was significant in the founding of APT and knew Isabel Myers, while John was involved in the factor analysis work on the MBTI and taught courses on MBTI Form J. He was also the spokesperson on Career Development for a time, writing in the *Bulletin of Psychological Type*.

Originally called the *ORA Personality Profiler*, the Golden was developed in the early 1990s. It claimed a broader theoretical background than that of Jung and included insights from Hans Eysenck, and the *Five-Factor Model* of personality (Big 5).

The usual 4 scales were included, with J-P having a different focus, that of Organizing-Adapting and labelled Z-A accordingly. The other scale names were made into action words e.g. *Introverting*, *Intuiting*. A fifth scale, *Tense-Calm*, related to responses to daily experiences.

These Global Scales contain sub-facets, in line with the factor analytic method used. The items are a mixture of paired words and statements and two variants of a 7-Point Likert scale are used. Availability is restricted to online completion, only.

Type distributions from the Golden vary quite a deal from MBTI generated type tables, which is attributed to its use being predominantly in organisations.

## Humanmetrics

This questionnaire, is free and available online at [www.humanmetrics.com](http://www.humanmetrics.com). It forms part of this survey as many identify it with the MBTI, even in professional papers and is used in training and other professional settings in that way. It comprised 72 Yes-No questions, many of which are emotionally-based and pejorative. Its accuracy is also highly questionable and easily ascertainable through personal completion.

### MajorsPTI and PT-Elements

The **MajorsPTI** was developed by Mark Majors, a psychometrician and counselling psychologist who was a researcher on MBTI Form M, a co-author of the MBTI Step II Manual and the initial Director of the MBTI Step III project, which he left in order to develop his own suite of instruments according to his own principles.

The PTI uses the same 4 scales as the MBTI and the scale names are action words, as with the Golden. It is available in online and self-score formats, with 52 items, 51 of which are scored for type. The online format allows for the generation of extra questions in the case of close scores in order to clarify results.

Its items and the theory behind it are based on a reading of Psychological Types and they appear in statement and word pair format. Scoring is via a modified 5-point Likert Scale (2-1-0-1-2). The neutral answer is not scored online and the relevant item is withdrawn from the assessment. The scoring method and validation process are copyrighted and identified by specific terms. The validation method emphasises the respondent rather than correlations. At any rate, a much higher accuracy is claimed than that of the MBTI.

The **Majors PT-Elements**, at 127 items, is both longer and more complex than the PTI, which it also incorporates, much as Form Q includes Form M. There are subscales for the usual 4 type dichotomies. A range of scoring methods are utilised to provide this information, as well as a *Personality Formation* component, based on internal and external responses to life experience and an indication of the level of use of the 8-mental functions for the person. The last two pieces of information are considered to be snapshot data derived from the completion of the questionnaire, and so can vary, although it is expected that the function with the most use will invariably be the dominant function and the least the inferior function, although this does not always occur.

### Questionnaires, Profiles – Why so Many?

The selection of questionnaires above represents a judgement as to, the most pertinent questionnaires. In this case a combination of history and locality (the US) has been used.

However other instruments such as Insights (Scotland), the JTI (Norway and Europe), Socionics (online/Russia), TMI (Australia) the Type Dynamics Indicator (England) as well as the many brief questionnaires that are part of various book introductions are available and used. The TMI for instance, dates from the 1970s

So why so many?

Firstly, these questionnaires and profiles represent different views of Jung's typology, some extensively researched others more sketchily so. Some don't appear to have contacted Jung's ideas much. The popularity of the MBTI, particularly from the 1980s, is also significant. The advent of a non-pathologically oriented questionnaire whose theme was that it was good to be you had broad appeal, to the dismay of some personality researchers and instrument developers. This appeal made it more likely that also meant that people would want to make up their own questionnaire and improve on the MBTI in whatever way they saw fit.

Importantly, Isabel Myers' work was a breakthrough, succeeding in solving the problem of measuring Jung's typology where others had failed. This kind of breakthrough in any area, more easily seen in technological development enables repetition and development. The success of the MBTI in the public domain made it easier for people to replicate the scales and items, because a successful method was there in front of them. Some replicators, by no means all, either directly used items from the MBTI, or paraphrased them. In this way, it's possible to get a workable questionnaire up and running without having to attend to the niceties of Jung or Myers at all.

People from various parts of the world have also experienced difficulty with the business approach and even the research practices related to the MBTI. The JTI, one of the results from this experience, is apparently the biggest selling type questionnaire in Europe for instance. The Golden sells extremely well in France.

### **Observations**

The proliferation of type questionnaires has both helped and hindered the spread of type ideas. The democratisation of type by making it available to the person in the street in these formats has been insightful for some, but trivialised the idea for others, particularly in its corporatisation where it can be used in the service of what appear philosophically incompatible strategies.

Both the attachment of type ideas to measurement and being judged in that field is problematic, given questions of reliability and validity, sometimes based on other personality ideas, and the variable nature of questionnaire results.

Appropriate training and authorisation is also hard to manage in the context of business aims, technological advances and the shorter time available to understand and use what is a deceptively simple idea.

Finally, the making up of decent items that reflect Jung's typology and the insights of Isabel Myers and Katharine Briggs and which are compatible with the inherent philosophy behind this work, is clearly very hard, from both observation (including recent MBTI items) and personal experience, as someone who once developed his own type questionnaire and taught it successfully to others.

## Some References to Consult

- Karen A Deitz; John P. Golden (2004) *Boundless Diversity: An Introduction to the Golden Personality Type Profiler* Pearson
- Peter Geyer (1995) *Quantifying Jung: The Origin and Development of the Myers–Briggs Type Indicator* MSc Thesis University of Melbourne
- Peter Geyer (2002) *What did Isabel Do? Insights into the MBTI* 6th Biennial Conference of the Australian Association for Psychological Type Sydney Australia 19–22 September 2002 and in Proceedings (ed. Mary McGuinness) pp 79–82 Yagoona 2002
- Peter Geyer (2008) *People and Qualities: The nature and type of participants in an Australian MBTI Qualifying Workshop* 6th Psychological Type and Culture Conference Honolulu Hawaii USA 4–6 Jan 2008
- Peter Geyer (2009) *Turbulent Life: On menus and other consuming decisions* Australian Psychological Type Review Vol 11 No 1 May 2009 pp13-18
- Peter Geyer (2011) *Pumping up the volume: Social Incongruities in modern times* Australian Psychological Type Review Vol 13 No 1 August 2011 pp37-40
- Peter Geyer (2011) *Pioneers and Fellow Travellers? A brief note on Positive Psychology, Isabel Briggs Myers and C.G. Jung* Bulletin of Psychological Type
- John P. Golden (2005) *Golden Personality Type Profiler Technical Manual* Pearson
- H Gray; J.B.Wheelwright (1946) *Jung's Psychological Types: Their Frequency of Occurrence* The Journal of General Psychology 34 3-17
- Horace Gray(1947) *Jung's Psychological Types: Meaning and Consistency of the Questionnaire* The Journal of General Psychology 37 177-86
- Horace Gray (1947) *Psychological Types and Changes with Age* Stanford medical Bulletin 3 273-7
- Horace Gray; Jane H Wheelwright Joseph B Wheelwright (und) *Jungian Type Survey* Society of Jungian Analysts San Francisco
- Humanmetrics (und) [www.humanmetrics.com](http://www.humanmetrics.com)
- Jolan Jacobi (1942) *The Psychology of C.G.Jung* Trans. K.W.Bash Kegan Paul, Trench, Trubner & Co
- C.G.Jung (1921/1990) *Psychological Types* CW6 Princeton
- Mary Loomis; June Singer (1902) *Testing the bipolar assumption in Jung's Typology* Journal of Analytical Psychology 25 351-6
- Mary I. Loomis (1982) *A New Perspective for Jung's Typology: The Singer-Loomis Inventory of Personality* Journal of Analytical Psychology 27 59-69
- Mark S. Majors (2011) *The Majors Personality Type Inventory Professional Users Manual* Second Edition ACER Press
- Mark S. Majors (2011) *The Majors Personality Type – Elements Professional Users Manual* ACER Press
- Isabel Briggs Myers (1962) *Manual (1962) The Myers–Briggs Type Indicator* Educational Testing Service
- Isabel Briggs Myers; Mary H. McCaulley (1985) *Manual: A Guide to the Development and Use of the Myers–Briggs Type Indicator* Second Edition CPP
- Isabel Briggs Myers; Mary H. McCaulley; Naomi L.Quenk; Allen L.Hammer (1998) *MBTI Manual: A Guide to the Development and Use of the Myers–Briggs Type Indicator* Third Edition CPP
- Isabel Myers; Mary McCaulley, Various letters papers, audio tapes and other documents Private Collection
- Naomi L. Quenk; Allen H. Hammer; Mark S. Majors (2001) *MBTI Step II Manual: Exploring the next level of type with the Myers-Briggs Type Indicator Form Q*,CPP
- Kathleen L. Ringenbach; John Golden (und) *The ORA Personality Profiler Technical Manual*
- June Singer; Mary H. Loomis (1984) *The Singer-Loomis Inventory of Personality (SLIP)* Booklet, Answer Sheet and Report Form Experimental Edition CPP
- Joseph B Wheelwright; Jane H Wheelwright; John A Buehler (1964) *Jungian Type Survey Manual: The Gray-Wheelwrights Test* 16th Revision Society of Jungian Analysts of Northern California