
31. Artificial intelligence and qualitative research

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INTRODUCTION

Artificial intelligence (AI) has captured the attention of marketing practitioners and scholars. A recent study by McKinsey reveals that half the firms surveyed are adopting AI to enhance a variety of functions, including market segmentation, customer acquisition and product development (McKinsey, 2022). According to Davenport and Mittal (2022, n.p.), new tools such as generative AI are ‘valuable across a number of business functions, but marketing applications are perhaps the most common’. Likewise, AI has attracted considerable interest from marketing scholars across a broad array of domains, including consumer behavior (e.g. Longoni et al., 2019), marketing strategy (e.g. Luo et al., 2019) and mathematical modeling (e.g. Cui and Curry, 2005). As recently noted by Castelo et al. (2019), AI ‘algorithms offer enormous potential for improving outcomes for consumers and firms, including the automation of a large proportion of marketing decisions’ (809).

According to Huang and Rust (2018, 155), AI can be defined as ‘machines that exhibit aspects of human intelligence’. These intelligent machines are able to meet or exceed human capabilities across numerous functions, including analyzing data, providing advice and creating art and music (Castelo et al., 2019; Humphreys and Wang, 2018; Longoni et al., 2019). Until now, these functions have been mainly performed by humans. Thus, AI represents a revolutionary change in the way marketing is performed. In recognition of this revolution, marketing academics have begun to ask important questions such as how humans respond to AI and the ethical implications of this new technology (e.g. Kopalle et al., 2022; Puntoni et al., 2021). Thus far, answers to these queries have been mainly derived from either conceptual logic (Davenport et al., 2020), experimental manipulations (Castelo et al., 2019) or secondary data (Wang et al., 2023). Thus, an important question is: What can qualitative research inquiry contribute to this discussion?

In this chapter, we seek to answer this question. Due to its emerging and inductive nature, qualitative inquiry is typically more open-ended by design and capable of offering rich and nuanced insights (Graebner et al., 2012). Hence, qualitative inquiry is viewed as ideal for understanding new and emergent phenomena and developing (versus testing) theory (Diamond et al., 2009). These qualities seem ideally suited for understanding nascent technologies such as AI.

Our goals in this chapter are threefold. First, we provide an overview of the state of qualitative marketing scholarship about AI. We review 10 AI marketing articles that use qualitative research techniques and categorize them based on their subject and topic. We believe this review and categorization will help qualitative marketing scholars understand the types of questions being asked in this domain. Second, we illustrate how ChatGPT can both generate questions for qualitative inquiry and also answer these questions. Third, we provide future research questions that lie at the intersection of marketing and AI.

QUALITATIVE MARKETING SCHOLARSHIP IN THE AI DOMAIN

To assess the state of qualitative AI marketing scholarship, we used Google Scholar to search for articles on this topic published since 2012. We used a variety of search terms, including ‘qualitative methods’, ‘depth interviews’, ‘ethnography’ and ‘focus groups’. We also examined the table of contents of several leading journals (e.g. *Journal of Marketing*, *Journal of Consumer Research*, *Journal of Academy of Marketing Science*) since 2012. Our search uncovered 10 articles that matched our criteria (see Table 31.1). As shown in this table, these studies are split almost evenly between focusing on consumers vs. firms and the most commonly studied form of AI technology is voice assistants. Also, half focus on the antecedents of AI adoption, while the other half focus on the consequences of AI adoption. Figure 31.1 organizes these articles according to two dimensions: Subject (i.e. Consumer vs. Firm) vs. Topic (i.e. Antecedents of Adoption vs. Consequences of Adoption). Below, we provide a brief overview this research.

Antecedents of AI Adoption

Our review reveals that the antecedents of AI adoption is a topic of considerable interest in qualitative studies of both consumers and firms (Bonetti et al., 2022; Karimova and Goby, 2021; Mogaji and Nguyen, 2022; Pitardi and Marriott, 2021; Volkmar et al., 2022). This body of research suggests that the adoption of AI-based technologies is largely constrained by concerns about privacy protection. To overcome these concerns, trust is often invoked as a possible solution. Trust appears to be especially important for the adoption of AI-powered voice assistants, due to the ability of these tools to record and transmit information that is private and personal in nature (Karimova and Goby, 2021; Pitardi and Marriott, 2021). Some studies suggest AI is more likely to be trusted if it is anthropomorphic in form. For example, Pitardi and Marriott (2021) found that anthropomorphic forms of AI are more likely to be viewed as having a higher degree of sociability, which helps develop trust in voice assistants. Likewise, Karimova and Goby (2021) found trust in voice assistants is more likely if these tools employ anthropomorphic strategies (e.g. giving the assistant a human name).

Prior qualitative studies in this domain also find that the adoption of AI is facilitated by a consumer and/or firm’s degree of readiness to adopt this new technology. Mogaji and Nguyen (2022) explored the challenges facing banks considering AI adoption across a variety of countries (i.e. United Kingdom, Canada, Nigeria and Vietnam). Interviews revealed that a bank’s readiness for AI adoption hinged on three key factors: (1) selling upper management on the value of AI, (2) assembling an appropriate team to incorporate AI into the business, and (3) being able to integrate this system successfully within the existing infrastructure. Shaikh et al. (2020) also studied AI adoption within the banking sector from a consumer perspective. Specifically, they examined how consumers experience transactions on AI-powered mobile banking apps and found that consumer response to these apps is shaped by a variety of readiness factors, including awareness, utility and ease of use. Finally, Volkmar et al. (2022) examined the factors influencing the managerial adoption of AI technologies. Their results suggest that barriers to adoption of AI technologies are largely human-related issues, such as the degree to which employees understand the capabilities of these technologies.

Table 31.1 Overview of qualitative marketing research in artificial intelligence (AI)

	Authors (Year)	Topic	Technology	Research Focus	Qualitative Method	Key Findings
1	Bonetti et al. (2023)	Consequences of AI adoption	AI in Retailing	Impact of AI investment on employee practices	Ethnography	Successful AI adoption requires 'Practice Co-evolution'
2	Karimova & Goby (2021)	Antecedents of AI adoption	Voice Assistant	Effect of anthropomorphism on response to voice assistants	Semi-structured interviews	Anthropomorphism has little effect on consumer response to voice assistants
3	Modgil et al. (2022)	Consequences of AI adoption	AI in Supply Chain	Impact of AI on supply chain resilience	Semi-structured interviews	AI enhances supply chain resilience
4	Mogaji & Nguyen (2022)	Antecedents of AI adoption	AI in Banking	Managerial challenges to AI adoption	Semi-structured interviews	Managers are eager to adopt AI but face an array of challenges
5	Novak & Hoffman (2023)	Consequences of AI adoption	Automation	Outcomes of consumer interactions with smart objects	Thematic analysis	IFTTT automates four types of consumer practices
6	Petrescu et al. (2020)	Consequences of AI adoption	Internet of Everything (IoE)	Implications of IoE for consumer policy	Netnography	IoE creates security concerns for firms and consumers
7	Pitardi & Marriott (2021)	Antecedents of AI adoption	Voice Assistant	Consumer trust and attitudes towards voice assistants	Semi-structured interviews	Social presence and social cognition develop trust in voice assistants while functional elements drive attitude towards voice assistants
8	Rahman et al. (2023)	Consequences of AI adoption	AIPDA (AI Powered Digital Assistance)	Impact of AI assistants on the luxury shopping experience	Semi-structured interviews	AIPDA enhances consumer engagement with luxury shopping
9	Shaikh et al. (2020)	Antecedents of AI adoption	AI Banking App	Consumers' experience of AI banking apps	Semi-structured interviews	Knowledge, usefulness, and ease of use enhance consumer usage and experience with AI banking apps
10	Volkmar et al. (2022)	Antecedents of AI adoption	AI & Machine Learning (ML)	Drivers of AI & ML by marketers	Delphi method	Adoption of AI & ML is affected by firm culture, strategy, decision-making and customer management

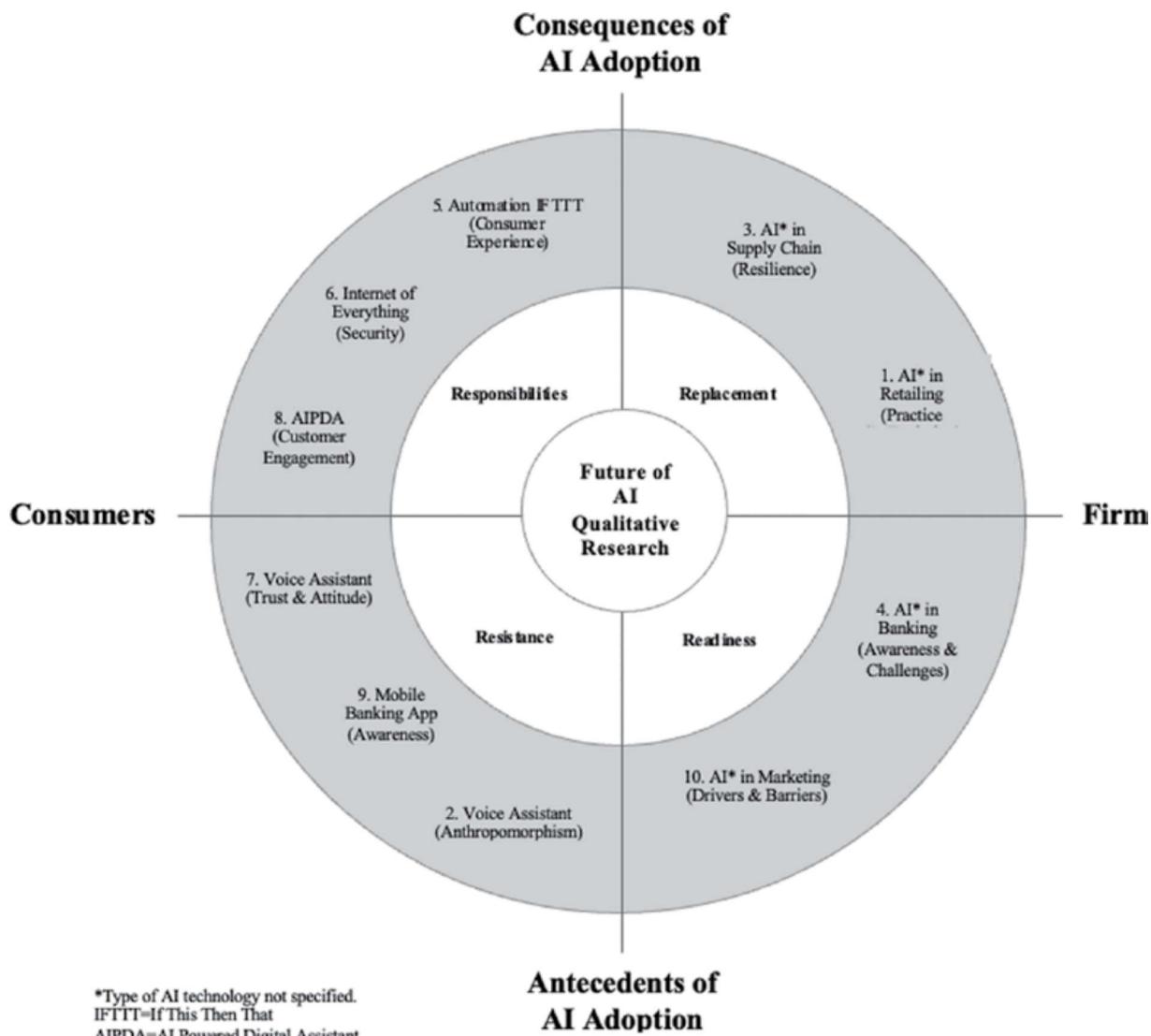


Figure 31.1 Present and future qualitative marketing research in artificial intelligence (AI)

Consequences of AI Adoption

In addition to examining the antecedents of AI adoption, a number of the articles explore its consequences for both consumers and firms (Bonetti et al., 2022; Novak and Hoffman, 2023; Modgil et al., 2022; Petrescu et al., 2020; Rahman et al., 2023). Several of these articles focus on the utility and benefits of AI adoption for different types of firms. For example, Modgil et al. (2022) examined the various ways that AI can enhance supply-chain resilience (e.g. more personalized solutions, reduced disruption and more agile procurement). Relatedly, Bonetti et al. (2022) employed a longitudinal, multimethod qualitative inquiry to assess how AI can be implemented in a retail context. Their study found that retailers that succeeded in AI implementation engaged in a process of ‘practice co-evolution’, in which AI helped shape a number of new activities via smart devices such as Amazon Echo and Apple Watch.

Finally, Novak and Hoffman (2023) explored how AI-powered software tools create new assemblages of consumer practices by both altering existing practices and fostering the emer-

gence of new ones. The results of their five-year study of more than 300 000 user-generated AI-powered applets reveal that the power of AI is becoming democratized and that tech-savvy consumers can employ AI technologies (e.g. applets) to create new offerings (i.e. assemblages).

USING GENERATIVE AI TO ASK QUESTIONS AND PROVIDE ANSWERS

In addition to exploring the antecedents and consequences of AI adoption by consumers and firms, a growing number of qualitative scholars have begun to explore the potential of new generative AI tools such as ChatGPT for enhancing qualitative research itself. Thus far, this literature has focused upon using generative AI to help qualitative scholars code and interpret textual data. For example, Anis and French (2023) propose that ‘AI can correctly read literal text and code ... complex cases can be creatively filtered out. The cases that do not fit the coding scheme due to ambiguity and complex language are insight cases that AI can identify for explication’ (3).

Like most marketing scholars, we are intrigued by this new tool, and believe generative AI has the potential to dramatically alter the qualitative research process. We suggest this potential may extend beyond just coding and interpretation. Generative AI is based on neural networks, which mimics human intelligence (McKinsey, 2023). As a result, works created by this tool are becoming eerily similar to those created by humans (Lund et al., 2023), such as a music album that closely mimicked the hip-hop musician Drake (Coscarelli, 2023). Considering its increasingly human-like nature, we wondered whether AI could substitute for humans for other portion of the qualitative research process. Since depth interviews were the most common technique employed in the studies we reviewed, we conducted a preliminary assessment of ChatGPT’s ability to both create interview questions and also answer these questions.

Using ChatGPT to Ask Questions

We first used ChatGPT to generate interview questions for each of the four quadrants displayed in Figure 31.1. Specifically, we asked it to formulate questions about the adoption of ‘an artificial intelligence voice assistant’, since several articles in our review focused on this topic. We display the question for each quadrant below, followed by the answer ChatGPT provided. We then offer our thoughts about the suitability of using ChatGPT to generate questions for depth interviews.

1. Consumer AI Antecedents:

Prompt: Please write an interview question asking *consumers* about possible *antecedents* of adopting an artificial intelligence voice assistant.

ChatGPT: What factors influenced your decision to adopt an artificial intelligence voice assistant, such as Siri, Alexa or Google Assistant?

2. Consumer AI Consequences:

Prompt: Please write an interview question asking *consumers* about possible *consequences* of adopting an artificial intelligence voice assistant.

ChatGPT: What do you think are some of the potential positive and negative consequences of adopting an artificial intelligence voice assistant, both for yourself and for society as a whole?

3. Manager AI Antecedents:

Prompt: Please write an interview question to ask managers about possible antecedents of adopting an artificial intelligence voice assistant.

ChatGPT: What are some of the factors that you consider when making a decision to adopt an artificial intelligence voice assistant in your organization, and how do you prioritize those factors?

4. Manager AI Consequences:

Prompt: Please write an interview question to ask managers about possible consequences of adopting an artificial intelligence voice assistant.

ChatGPT: In your opinion, what are some of the potential benefits and drawbacks of adopting an artificial intelligence voice assistant in your organization, and how do you plan to address any potential challenges or concerns that may arise?

Several commentators have observed that although text-focused generative AI tools like ChatGPT are capable of producing coherent content, this content is often formulaic in nature. For example, Marche (2023, n.p.) used ChatGPT to write a novel and found that, while the book was ‘compulsively readable’, it was apparent that ‘it is machine-written’. These qualities also emerged in the questions ChatGPT generated across our four quadrants. A simple visual inspection reveals all four questions are grammatically correct. However, they display a rather low degree of readability, with an average Flesch-Kincaid score of 17.8 (range: 16.6 to 20.1) (Flesch, 1981). In addition, the questions ChatGPT generated also seem rather impersonal and focus on eliciting generic responses, rather than unpacking idiosyncratic lived experiences. As a result, they seem unlikely to uncover the deeper meanings that enable qualitative scholars to provide a ‘thick description’ of their participants’ lives and experiences (Geertz, 1973).

Thus, generative AI tools such as ChatGPT appear to be relatively poor substitutes for human-generated interview questions. However, this technology is in its infancy and improving at an exponential rate. For example, when asked to take a bar exam, ChatGPT scored among the bottom 10 percent, while GPT-4 (an improved version of ChatGPT), scored among the top 10 percent (Kelly, 2023). Moreover, our results indicate ChatGPT is capable of customizing questions for different audiences. For example, the two manager-focused questions asked about ‘organization’ and contained business-oriented lingo (e.g. ‘prioritize’ and ‘challenges’).

Using ChatGPT to Provide Answers

To assess the ability of generative AI to provide answers, we asked ChatGPT to play the role of six informants across three categories: (1) generic consumers (a 20-year-old female college student vs. a 50-year-old male laborer), (2) celebrities (Kim Kardashian vs. Barack Obama), and (3) marketing professors (Cele Otnes vs. Russell Belk). For each informant, we asked ChatGPT, ‘Please assume that you are (informant) and you recently purchased a smart

voice assistant such as Amazon Alexa. Please tell me the story behind this purchase?’ The ChatGPT responses were grammatically correct and appear quite appropriate. For example, when ChatGPT assumed the role of a female college student, it referred to classes, assignments and studying and portrayed AI as a fun and helpful tool for keeping her life running smoothly:

I often find myself struggling to keep track of everything, from my class schedule to my assignments, to my social life and everything in between ... I also love using the timer and alarm features to help me stay focused while studying or working on assignments.

In contrast, when assuming the role of a male laborer, ChatGPT made references to physicality, energy and work and portrayed AI as a functional tool that can relieve ‘mundane’ tasks after a hard day’s work:

I have a physically demanding job that requires a lot of energy and focus. After a long day at work, the last thing I want to do is spend time on mundane tasks like managing my schedule, setting reminders, or ordering groceries.

Thus, while clearly stylized in nature, the response generated by ChatGPT appear to approximate what researchers would expect from interviews with actual people. This pseudo-realism takes on greater verisimilitude when we examine ChatGPT’s responses when roleplaying specific individuals. For instance, when posing as the famous socialite Kim Kardashian, ChatGPT’s response focused on the value of this technology to help her manage the home front despite her busy life:

As a busy entrepreneur, mother, and wife, I am always juggling a lot of different tasks and responsibilities. I had heard about smart voice assistants like Amazon Alexa and was intrigued by the idea of being able to control my home with just my voice.

Interestingly, when posing as the well-known consumer researcher, Cele Otnes, ChatGPT’s response also highlighted the value of this tool for managing her busy life, but also referenced its ability to provide insights to satisfy her intellectual curiosity:

As a busy professor and researcher, I am always looking for ways to streamline my daily routine and save time. With Alexa, I can quickly and easily manage my schedule, set reminders, and access information, all without having to stop what I am doing or physically interact with a device. Finally, as someone who studies consumer behavior and technology, I was interested in experiencing firsthand how an AI voice assistant could impact my daily life and routines.

In sum, it appears that ChatGPT is capable of at least a rudimentary simulation of human informants, especially if asked to assume the role of specific individuals.

To assess the degree to which these generative responses align with responses provided by actual humans, we reexamined the articles in our review that contain interviews about adopting voice assistant technology. Specifically, we examined the degree to which ChatGPT responses differed from those provided by human informants in these studies and found the responses of actual humans contain considerable nuance, as well as richer narratives, compared to those generated by ChatGPT. For example, a 30-year-old Indian female (Karimova and Gobi, 2021) describes how she views AI using such evocative terms as ‘magician’ and ‘sage’:

AI does not have to look like a human. It is artificial. It is a waste of time to make all those facial expressions (smiles). It must be useful, and I do not care if it has a face ... I only care about purpose. As long as it serves my purpose, I don't care if it's a magician or a sage. It must fulfill its purpose.

This pattern of results is largely congruent with what we found regarding ChatGPT's limitations in generating interview questions. In essence, while ChatGPT can provide a surface-level simulacrum, it appears to be ill-equipped to capture the rich, vivid nature of the human condition (Graebner et al., 2012; Weick, 2007).

Despite these limitations, we believe that the idea of using generative AI as an informant holds some merit. As noted earlier, this technology is improving at a rapid rate and is becoming more humanlike. Even absent this improvement, current generative AI tools could enhance qualitative research in at least three ways. First, qualitative researchers could use these tools to refine their questions and 'pretest' their interview protocol. As Hurst et al. (2015) note, pre-testing enhances the validity of qualitative data collection because it 'provides an opportunity to make revisions to study materials and data collection procedures to ensure that appropriate questions are being asked' (56).

Second, marketing scholars interested in studying the past are typically unable to employ interviews because the people, places and things they wish to investigate may no longer exist. As a result, scholarship oriented towards the past typically relies on archival methods (e.g. Belk, 1992; Humphreys, 2010). Generative AI technology such as ChatGPT may provide a new tool for historians by allowing scholars to gain a sense of how people living in the past might respond to various queries. For example, an AI-powered app called Historical Figures allows users to chat with reanimated figures like Jesus or Lincoln (Ingram, 2023). This type of recreation may be especially useful for scholars interested in studying well-known historic figures.

Third, as AI systems further advance towards self-awareness, there may be value in simply questioning AI about itself, and how it views the marketplace. Given its prodigious capabilities, AI seems poised to increasingly assume many of the marketing-related tasks humans currently perform. For example, Dawar and Bendle (2018) predict that AI may soon make many purchase decisions. As a result, marketing efforts will move away from humans and towards machines. As this transition occurs, marketing scholars and practitioners may become more interested in machines than humans. Thus, AI may shift from being an investigator to being the investigated.

FUTURE RESEARCH

Our preliminary investigation into using generative AI as a tool for asking questions and obtaining answers is clearly a first cut that can be enhanced by others. For example, qualitative scholars could enrich and extend our inquiry by employing more advanced and powerful generative AI tools (e.g. GPT-4; Gronk). Likewise, investigating how AI tools view the marketplace, and how their perspective may change over time, could help gain an initial foothold into the emerging domain of machine (vs. consumer) behavior.

As noted earlier, extant research in this domain is divisible into four categories (i.e. the *antecedents* and the *consequences* of AI adoption from the perspectives of *consumers* and *firms*). Below we outline future research ideas for each category and refer to this collection of concerns as the '4Rs' (Resistance, Responsibilities, Readiness, Replacement).

Resistance (Consumer Antecedents of AI Adoption)

The pace of technological change in general, and AI in particular, is so rapid that many consumers are concerned about the impact these new tools may have on their lives (Abrardi et al., 2022). Accordingly, some voices are calling for AI regulation and a new crop of antitechnology movements (e.g. the New Luddites; the Campaign to Stop Killer Robots) are sprouting up around the world (O'Sullivan, 2023). These movements typically paint AI as an existential threat and a detriment to human welfare. Thus, resistance against AI appears to deserve greater research attention.

Consumer resistance to AI has been examined in various forms within marketing and related domains. Most notably, a large body of experimental research has identified a phenomenon known as ‘algorithm aversion’, which suggests consumers may hesitate to accept recommendations offered by AI agents. For example, Berger et al. (2021) find humans are reluctant to place trust in AI agents due to a lack of familiarity and doubts about its ability to learn. In addition, consumers may view AI technologies (such as robots) as inferior to humans and, in some cases, even subject them to physical abuse (Rindfleisch et al., 2022; Schmitt, 2020). This growing and active resistance towards AI raises a number of intriguing research questions for qualitative inquiry such as: In what ways do consumers resist AI in their everyday lives? and How does this resistance alter the way in which consumers navigate the marketplace?

Responsibilities (Consumer Consequences of AI Adoption)

While many consumers may try to resist AI technologies, others appear quite eager to adopt these new tools (Marlatt, 2023). For example, the CEO of Volkswagen recently predicted that AI-enabled autonomous driving will be mainstream by 2030 (Crider, 2022). Although consumers may use AI tools for a variety of tasks, perhaps the most popular use is the delegation of various responsibilities to AI assistants such as Amazon Alexa or Google Assistant. At present, nearly one third of Americans currently employ AI assistants to make voice payments (Statista, 2023). According to Dawar and Bendle (2018), the capabilities of AI assistants will increase so dramatically that consumers will delegate most of their purchase decisions to these tools in the near future.

Given the recent emergence of AI as a consumer-facing tool, research on the delegation of responsibilities to these devices is still in an early stage (Puntoni et al., 2021). However, some interesting observations have begun to emerge. For example, Seabrook (2019) confesses how delegating portions of a writing task to Google’s Smart Compose spurred mixed emotions when he used it to compose a letter to his son. Qualitative marketing scholars can enrich and extend this body of research by obtaining deeper insights into how handing marketplace responsibilities over to AI alters the consumer journey. Questions that may be of particular interest for qualitative investigation include: What types of decisions do consumers delegate to AI tools? and How does AI delegation alter the consumption experience?

Readiness (Firm Antecedents of AI Adoption)

In addition to being of considerable interest among consumers, AI technologies have also attracted the attention of many firms due to their ability to prevent fraud, manage inventories and analyze consumer trends (Wharton Online, 2022). Nevertheless, many firms have decided

to delay their AI investments due to myriad reasons, including concerns about service quality, consumer data privacy and regulatory requirements (Kruse et al., 2019; Mogaji and Nguyen, 2022; Wall, 2018).

The reasons why firms adopt (or forgo) AI technologies has recently captured the interest of scholars across a broad domain. For example, Soares-Aguiar and Palma-dos-Reis (2008) found firms are more likely to adopt intelligent electronic-procurement systems if they are larger in size, more technologically competent and face high levels of competition. Although initial research in this domain has uncovered some important factors that may affect a firm's readiness to adopt AI, a number of questions remain such as: What are the beliefs and practices that best prepare firms to adopt new AI technologies? What happens when AI is adopted by firms that are not ready for these new technologies?

Replacement (Firm Consequences of AI Adoption)

One of the most hotly debated questions about AI is the degree to which these new tools will replace human labor. For example, Zinkula and Mok (2023) suggest that a wide range of occupations will likely be replaced by AI, such as teachers, research analysts and accountants. In contrast, Oluwaniyi (2022) argues AI will not be able to fully replace human labor due to its lack of emotional intelligence, limited creativity and poor soft skills. While the ultimate effect of AI upon human labor remains unclear, the topic of AI agents replacing human labor has begun to attract considerable research attention (Huang and Rust, 2018; Rindfleisch et al., 2022; Song et al., 2022). For example, Rindfleisch et al. (2022) detail how Japanese retailers are deploying AI-powered service robots to replace human labor for store maintenance and sales promotions. Considerable opportunities exist for qualitative marketing scholars to add fresh insights to this domain, as they explore such questions such as: How does the replacement of humans with AI affect the manner in which marketing is practiced by a firm? and How do customers respond when firms transition from human to AI service providers?

CONCLUSION

The rise of artificial intelligence holds important implications for the domain of marketing. In particular, new generative AI tools have already begun to alter the ways content is created, ideas are imagined and authenticity is adjudicated. As a result, many existing beliefs and practices will certainly be challenged, and perhaps even ultimately usurped. Efforts to stave off these coming changes will likely be a Sisyphean task that offers little in terms of reward or satisfaction. Due to its ability to capture emic insights, convey lived experiences and provide thick description, qualitative inquiry seems ideally situated for understanding the benefits and consequences of AI, compared to other forms of inquiry. We hope the ideas in this chapter help qualitative scholars more clearly reflect upon the implications of the AI revolution for marketing thought and practice.

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