

METHODOLOGY PAPER

METHODOLOGY · SCREEN-SHARING CATI

Screen-Sharing *CATI*

A Methodology for Running Visual and Choice-Based Studies by Phone

A telephone interview is assumed to be voice-only — so the visual work, conjoint, MaxDiff, ad and concept tests, pricing tradeoffs, is assumed to be online-only. Screen-sharing CATI breaks that assumption: a secure shared screen lets a respondent see and work through stimuli while a live interviewer guides the task. This is a vendor-neutral account of how it works, the studies it fits, and where its limits lie.

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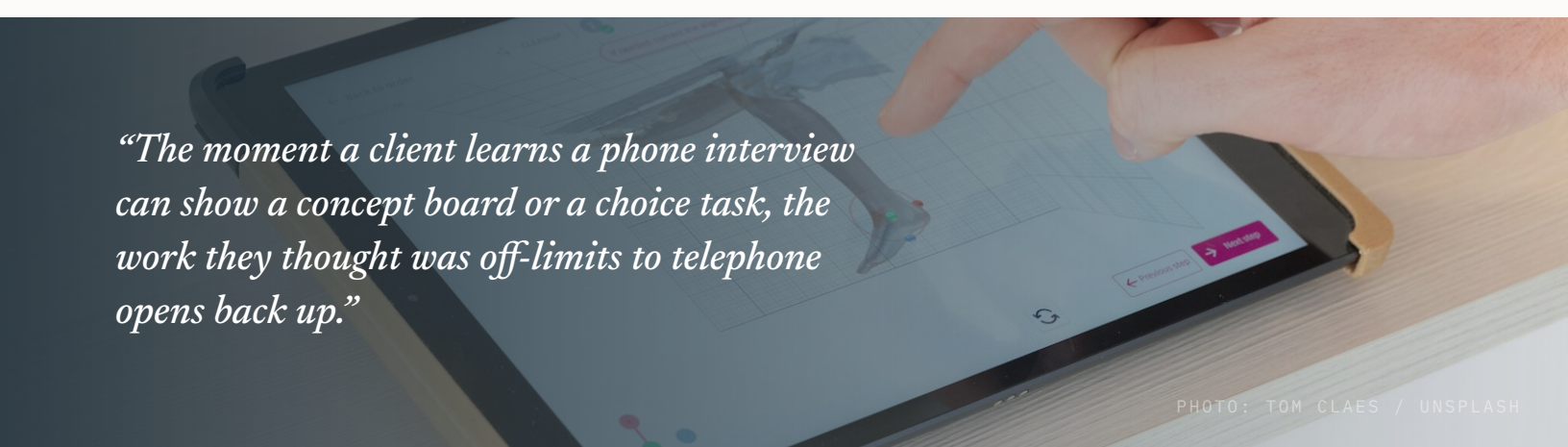
Methodology Papers

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“The moment a client learns a phone interview can show a concept board or a choice task, the work they thought was off-limits to telephone opens back up.”

PHOTO: TOM CLAES / UNSPLASH

ABSTRACT

Telephone interviewing is widely treated as a voice-only mode. That assumption quietly rules out an entire class of research — anything that needs the respondent to see something: a concept board, an advertisement, a product image, or a choice-based exercise like conjoint or MaxDiff. For audiences best reached by phone, the visual work seems to belong to online self-completion by default.

Screen-sharing CATI removes that constraint. A secure shared screen presents stimuli to the respondent while a trained interviewer administers the study, guides the task, and confirms what is on screen — combining telephone reach with visual delivery. This paper explains **what screen-sharing changes**; catalogues the **study types it fits**; makes the **data-quality case** for a guided visual task over an unguided one; sets out how to **run a clean session**; and answers the **questions buyers ask**. It is the visual-capability companion to Paper No. 139 (when to use CATI) and No. 141 (mixed-mode designs).

CONTENTS

01	The voice-only assumption	The visual ceiling researchers accept by default
02	What screen-sharing changes	A shared screen plus a guiding interviewer
03	The best-fit study catalogue	Five visual methods, unlocked by phone
04	Why guided beats self-serve	The data-quality case for complex tasks
05	Running a clean session	The anatomy of a screen-sharing interview
06	Questions buyers ask	Security, bias, and when not to use it

WHO THIS IS FOR

Insights buyers and brand researchers who assumed conjoint, ad testing, or concept work was off-limits for a phone-reached audience; **healthcare, B2B, and executive researchers** fielding visual studies with low-incidence respondents; and **research and ops teams** scoping a complex design across modes. No technical background is assumed; practitioners can skip to the catalogue in Section 03.

01 THE PREMISE

A phone interview is assumed to be voice-only — so visual research goes online by default.

Ask most researchers what telephone interviewing can do and the mental model is fixed: a voice asks questions, a voice answers. By that model, anything a respondent must see — a concept, an ad, a product, a tradeoff grid — cannot be done by phone, and a whole class of work is quietly assigned to online self-completion before the mode is even discussed.

The hidden cost of that assumption

The assumption is expensive precisely when the audience is hard to reach. The respondents most worth talking to — physicians, senior executives, niche technical roles, low-incidence segments — are often the ones least reachable through an online panel. When a study of that audience also needs a visual task, the voice-only model forces a bad trade: either field the visual work online and accept the coverage gap, or drop the visual component to keep the audience. Neither serves the research question.

VOICE-ONLY CATI — ASSUMED CEILING

What it is presumed it cannot do

- Present a **concept board, ad, or product image**
- Run a **conjoint or MaxDiff** choice exercise
- Show a **pricing or feature tradeoff** grid
- Let the respondent **see and react** to a stimulus

SCREEN-SHARING CATI — WHAT CHANGES

What it actually can do

- ◆ Share stimuli on a **secure screen**, live
- ◆ Walk a respondent through a **structured visual task**
- ◆ Confirm the **correct screen** is in view, in real time
- ◆ Keep telephone **reach and rapport** for hard audiences

THE REFRAMING

The question is not “**can we reach this audience, or can we run the visual task?**” — screen-sharing CATI is what lets a researcher answer “**both.**” The chapters that follow describe how it works and where it genuinely fits.

02 THE MECHANISM

A shared screen, plus an interviewer who guides — not a self-serve survey.

Screen-sharing CATI adds one capability to a standard telephone interview: the interviewer can present a secure screen to the respondent, so visual stimuli and complex tasks can be evaluated during the live call. Crucially, it does not turn the study into self-completion — the interviewer remains in control of pacing, instruction, and the question-and-answer process throughout.

Three things the mechanism provides

CAPABILITY 1**Visual delivery**

Respondents view concept boards, claims, product images, ad creatives, and choice tasks they could not evaluate by voice alone.

CAPABILITY 2**Guided administration**

The interviewer walks the respondent through complex exercises, so the study stays standardized rather than becoming self-serve.

CAPABILITY 3**Preserved reach**

Hard-to-reach, niche respondents who would not complete the same study online can still be engaged — by phone, with visuals.

The distinction matters methodologically. A self-administered online exercise leaves the respondent alone with the instrument; a screen-sharing interview keeps a trained interviewer between the stimulus and the answer. That interviewer presence is the same lever standardized interviewing has always used to reduce respondent error — applied here to a visual task that would otherwise have no human guide at all.²

THE ESSENTIAL POINT

Screen-sharing CATI is **not “online with a phone attached.”** It is a telephone interview that gains sight — the rapport, control, and reach of CATI, now able to carry the visual stimulus that used to force a study online.

03 THE CATALOGUE

Five visual methods that screen-sharing unlocks by phone.

Screen-sharing CATI fits whenever the audience is difficult to reach and the design needs visual presentation. The five method families below are the most common — each pairing a stimulus the respondent sees with a task the

METHOD Conjoint & discrete choice	RESPONDENT SEES Choice sets of product profiles — features and prices shown side by side to trade off.	INTERVIEWER DOES Explains the task, paces each choice, and confirms the right set is on screen.
METHOD MaxDiff prioritisation	RESPONDENT SEES Sets of items to rank by most/least important, preferred, or appealing.	INTERVIEWER DOES Keeps the exercise moving and consistent across the full set of screens.
METHOD Ad, claims & message testing	RESPONDENT SEES Ad creative, claims, or messaging shown in full, exactly as intended.	INTERVIEWER DOES Probes reactions and clarifies, capturing nuance a tick-box could miss.
METHOD Product & package evaluation	RESPONDENT SEES Product images, packaging, or concept boards under structured review.	INTERVIEWER DOES Directs attention to the right element and records considered feedback.
METHOD Pricing & feature tradeoffs	RESPONDENT SEES Price points and feature bundles to weigh against one another.	INTERVIEWER DOES Ensures the tradeoff is understood before the answer is given.

04 THE QUALITY CASE

On a complex visual task, a guide is a quality control — not a courtesy.

The case for screen-sharing CATI is not only reach; it is data quality on exactly the tasks most likely to go wrong unguided. Conjoint, MaxDiff, and tradeoff exercises are cognitively demanding, and an unaccompanied respondent who misreads the task can produce clean-looking but meaningless data. A present interviewer changes that.

What the interviewer catches in real time

- ◆ **Wrong screen** — confirms the respondent is seeing the correct stimulus before an answer counts.
- ◆ **Misread instructions** — clarifies the task so the exercise measures preference, not confusion.
- ◆ **Visible confusion** — hears hesitation and intervenes before it becomes a bad data point.
- ◆ **Early abandonment** — sustains engagement through a long exercise that a lone respondent would quit.

Why this matters more for choice tasks

Standardized interviewing reduces respondent-related error by establishing the task, holding instructions consistent, and keeping the question-and-answer process on track — the interviewer's defined role in producing reliable data.² On a self-administered conjoint, none of that support exists; the design assumes the respondent understood. For a high-value, hard-to-reach respondent, that assumption is exactly the risk screen-sharing removes.

BUYER'S QUESTION

Ask: **"On our hardest exercise, who confirms the respondent understood the task?"** Self-serve online answers "no one"; screen-sharing CATI answers "the interviewer, in real time."

05 THE ANATOMY

The anatomy of a screen-sharing interview, end to end.

A screen-sharing session is a standard CATI interview with a visual segment placed inside it. Run well, the visual portion feels seamless to the respondent; the discipline is in the handoffs. The five stages below trace one interview from connection to capture.

01 Connect The interviewer reaches the respondent by phone and completes the standard introduction and screening.	02 Share A secure screen is opened and the respondent confirms the shared view — consent and the link are established.	03 Confirm Before the task counts, the interviewer verifies the correct stimulus is on screen and the instructions are understood.	04 Guide The interviewer paces the visual exercise, probes where useful, and watches for confusion in real time.	05 Capture Responses are recorded live in the CATI script, alongside the rest of the interview, in one clean record.
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What keeps the session clean

The same execution discipline that governs any quality CATI study applies here — a tested script, consistent administration, real-time monitoring, and pre-field piloting of the visual segment so the share-and-confirm handoff is smooth before fielding begins. The visual task is rehearsed, not improvised.

OPERATIONAL NOTE

Treat the **share → confirm** handoff as the highest-risk moment and pilot it explicitly. A respondent answering about the wrong screen is the one failure mode unique to this mode — and the easiest to design out.

Three questions every buyer asks about screen-sharing CATI.

Once the capability lands, the same practical questions follow — about the shared screen, about whether a present interviewer biases a visual judgement, and about when the mode is the wrong choice. Honest answers, not reassurance, are what make the method usable.

Q Is sharing a screen with a respondent secure and appropriately consented?

A Yes — a screen is shared through a **secure, purpose-built connection**, the respondent confirms the shared view, and the share is consented as part of the interview. Personal data stays governed by the same standards as any CATI study; the shared screen carries the stimulus, not the respondent's identity.

Q Does having an interviewer present bias how a respondent reacts to a stimulus?

A It is a real consideration, managed the same way standardized interviewing manages it everywhere: **trained, neutral administration**. The interviewer presents, paces, and clarifies without steering the judgement — the same discipline that lets interviewer-administered surveys reduce error rather than introduce it.² The alternative — a confused, unguided respondent — is not more neutral; it is just unobserved.

Q When is screen-sharing CATI the wrong choice?

A When the audience is **fully reachable online** and the visual task is straightforward, self-completion is faster and cheaper — screen-sharing earns its place only when reach and a guided visual task are both required. It is a precision tool for hard-to-reach visual studies, not a default for every concept test.

WHERE THIS SERIES GOES DEEPER

No. 139	When to use CATI. Deciding whether telephone is the right primary mode before adding a visual segment.
No. 141	Mixed-mode designs. Combining screen-sharing CATI with an online core for broader coverage.
No. 135	HCP mode-choice. The mode decision applied to physician and healthcare-professional audiences.

▲ CONCLUSION

The telephone can show, not just tell.

The voice-only model of telephone research quietly forecloses a whole category of work — the visual and choice-based studies that hard-to-reach audiences are least able to complete unguided online. Screen-sharing CATI removes that foreclosure: a secure shared screen carries the stimulus, and a trained interviewer carries the task, so conjoint, MaxDiff, ad testing, and concept work become feasible with the very respondents who matter most. Used with discipline — a piloted share-and-confirm handoff, standardized administration, and honest limits — it is not a novelty but a precise extension of CATI's reach into visual research. Recognised conduct and service-quality frameworks let buyers ask for that rigour in consistent terms.^{3,4}

§ REFERENCES

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- [2] Fowler, F. J., & Mangione, T. W. **Standardized Survey Interviewing: Minimizing Interviewer-Related Error**. Applied Social Research Methods Series, vol. 18. Newbury Park, CA: Sage Publications, 1990. (The interviewer's role in reducing respondent-related error.)
- [3] ICC/ESOMAR. **International Code on Market, Opinion and Social Research and Data Analytics**. ICC & ESOMAR. (Standardised conduct, consent, and data protection in fieldwork.)
- [4] International Organization for Standardization. **ISO 2052:2019 — Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements**. Geneva: ISO, 2019.

References are cited for the methodological and conduct frameworks they establish — choice-based study design, the interviewer's error-reducing role, and quality-management requirements — not for any operational figure transferred to this paper. This paper publishes no feasibility, completion rate, or data quality statistics; any such number is study-specific and should be modelled from a defined design.

Tell us the audience, the visual task, and your incidence assumptions and we'll tell you whether screen-sharing CATI fits, then return a modelled feasibility range, typically within 24 hours.

§ ABOUT

CatalystMR

CatalystMR is a global market-research panel and fieldwork partner specialising in **hard-to-reach B2B, healthcare, and niche audiences**. We run CATI — including screen-sharing CATI for visual and choice-based tasks — alongside online panel and survey programming from a single point of contact, so a study's design is not limited by what one mode can carry.

For screen-sharing work we field standardised, monitored interviews and pilot the visual segment before launch, so the share-and-confirm handoff is clean from the first complete.

Compliance posture: our methodology is aligned to the ESOMAR Code and Guidelines and the ISO 2052 framework, and we are certified under the EU-U.S., UK, and Swiss Data Privacy Frameworks, with personal data siloed from response data.

SCREEN-SHARING CATI

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