

METHODOLOGY PAPER

METHODOLOGY · MODE SELECTION

When to Use *CATI*

A Methodology for Choosing Telephone as the Primary Mode

Telephone interviewing is neither outdated nor universal — it is the right primary mode under specific, nameable conditions. This is a vendor-neutral framework for deciding when computer-assisted telephone interviewing (CATI) should lead a study, when it should support an online core, and when it adds cost without adding quality.

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“The question is not whether the telephone is modern. It is whether, for this audience and this instrument, a person on the line reaches respondents — and answers — that a screen cannot.”

PHOTO: PAVAN TRIKUTAM / UNSPLASH

ABSTRACT

Mode selection is too often settled on a single line of the budget: the cheapest complete wins, and the telephone loses by default. That is a methodology decision disguised as a procurement one. The mode a study uses shapes who can be reached, who agrees to take part, and how honestly and completely they answer — the coverage, nonresponse, and measurement components of total survey error — long before a cost-per-complete is compared.

This paper sets out an audience-agnostic framework for when **CATI should be the primary mode**. It names the **six conditions** that call for telephone; offers a **suitability scorecard** that counts how many apply and reads off a recommendation; states honestly **when CATI is the wrong call**; lists **what makes a CATI study succeed**; and closes with a **commissioning-readiness** checklist of what to settle before briefing a telephone partner. It complements — and does not repeat — Paper No. 135's mode decision for healthcare audiences.

CONTENTS

01	Mode is a methodology decision, not a cost line	Why the cheapest complete can be the costliest
02	The six conditions that call for CATI	When a voice on the line earns its cost
03	The CATI suitability scorecard	Counting conditions to a recommendation
04	When CATI is the wrong call	Honest boundaries of the mode
05	What makes a CATI study succeed	Execution, not just selection
06	Commissioning readiness	What to settle before you brief a partner

WHO THIS IS FOR

Research buyers and insights leads choosing a mode for an upcoming study; **agency and brand researchers** designing B2B, healthcare, or hard-to-reach fieldwork; and **procurement and operations teams** weighing telephone against online on more than unit price. No methodological background is assumed; practitioners can skip to the scorecard in Section 03.

01 THE PREMISE

The cheapest complete can be the costliest sample.

A survey's mode is usually chosen the way a commodity is bought: by unit price. Online wins, because a panel complete is cheaper than an interviewer minute. But mode is not a line item — it is a methodological choice that determines who is reachable, who agrees to respond, and how candidly they answer. Decide it on price alone and the savings can be erased by error you never see in the invoice.

Mode acts on three components of total survey error

COVERAGE**Who can be reached**

If part of the target population is not online or not on a panel, an online frame cannot represent them — at any price. Telephone reaches further.

NONRESPONSE**Who agrees to take part**

Some audiences ignore panel invitations but will speak to an interviewer who introduces the study. The mode changes who says yes.

MEASUREMENT**How they answer**

Interviewer pacing, clarification, and rapport change the completeness and candour of answers — for better on long or complex instruments, and sometimes for worse.

These are the well-established components of total survey error — the framework survey methodology uses to weigh design choices against each other rather than optimising one in isolation.² Mode sits upstream of all three. A complete that is cheap but drawn from a frame that misses a third of the population, or answered by whoever was easiest to reach, is not a saving; it is error purchased at a discount.

THE REFRAMING

The right question is not “**what is the cheapest way to field this?**” but “**what mode lets this audience be reached, recruited, and measured well — and what is the true cost of getting that wrong?**” CATI earns its higher unit cost precisely when the alternative buys cheap completes that cannot answer the research question.

02 THE CONDITIONS

Six conditions under which a voice on the line earns its cost.

CATI is the right primary mode when one or more of the following conditions hold. Each names a place where an online frame degrades — in coverage, cooperation, control, or candour — and where an interviewer recovers what the screen loses. They are stated audience-agnostically: the same logic applies to a rural population, a regulated profession, or a low-incidence niche.

01	Limited online reach COVERAGE	The target skews toward populations with low internet or panel penetration — older, rural, or certain international markets — where an online frame structurally under-covers the people the study is about.
02	Hard-to-reach, low-cooperation audiences NONRESPONSE	Specialists, senior decision-makers, and other professionals who rarely engage with panels will often take a scheduled call with a researcher introduction when they would ignore an emailed link.
03	Complex screening, very low incidence CONTROL	When qualification is intricate and incidence is low, human judgement at the screener verifies eligibility and deters the fraudulent or coached entry that automated screeners admit.
04	Long or cognitively demanding instruments MEASUREMENT	On long, branching, or effortful surveys, interviewer pacing and rapport sustain attention and completion where an unaccompanied online respondent abandons or satisfices.
05	Sensitive topics needing rapport CANDOUR	Some subjects require human trust to elicit honest, complete answers; a skilled interviewer can establish the context that a cold online form cannot.
06	Regulated or high-stakes integrity ASSURANCE	For regulatory, legal, or strategically critical work, an auditable, monitored human process provides assurance over data provenance that an anonymous online complete cannot match.

03 THE SCORECARD

Count the conditions; read off the mode.

Mode choice rarely turns on a single factor — it turns on how many of the six conditions a study triggers at once. Counting them converts an argument into a recommendation: the more conditions apply, the more the case shifts from online, through mixed-mode, to CATI as the primary mode. The scorecard is a heuristic for structuring the decision, not a formula that replaces judgement.

CATI SUITABILITY SCORECARD	
How many of the six conditions does your study trigger?	
0–1	Online panel typically suffices The audience is digitally reachable and the instrument is modest. Telephone adds cost without materially reducing error. Field online, and direct quality effort at fraud and attention checks.
2–3	Consider mixed-mode Part of the sample is hard to reach or the instrument is demanding, but not the whole study. Run CATI for the difficult segment and online for the accessible core, unified by one screener with a mode flag for analysis.
4+	CATI as the primary mode Coverage, cooperation, complexity, and integrity pressures compound. An online-first design would under-cover or under-recruit the population and degrade the data. Lead with telephone; use online only where it demonstrably helps.

Counting is directional, not arithmetic: a single decisive condition – a population that is simply not online, or a regulatory integrity requirement – can justify CATI on its own. Read the count alongside the weight of each condition for the specific study.

HOW TO USE IT

Walk the six conditions of Section 02 against your study, mark each that clearly applies, and locate the total on the band above. Treat the result as the **starting recommendation** to pressure-test — then confirm feasibility, cost, and timeline against it, rather than letting price set the mode first and rationalising it after.

04 HONEST BOUNDARIES

A vendor-neutral framework names its own limits.

A framework that recommended telephone for everything would be a sales pitch, not a methodology. CATI is the wrong primary mode more often than it is the right one, and saying so is what makes the six conditions meaningful. Where none of them holds, telephone typically adds cost and field time without reducing error — and may introduce error of its own.

BOUNDARY 1

Visual stimuli are essential

Concept boards, video, conjoint cards, and interactive exercises are native to the screen. A voice-only call cannot present them — and a study built around them belongs online, or on screen-sharing CATI as a bridge.

BOUNDARY 2

The audience is fully online

When the population is digitally reachable and willing, an online frame covers and recruits it well. Telephone then buys reach you already have, at a premium.

BOUNDARY 3

Short, simple instruments

For brief, non-sensitive surveys, interviewer rapport adds little; self-completion is faster, cheaper, and free of interviewer effects on the answers.

BOUNDARY 4

Speed or scale dominates

Where very large n or a same-week turnaround is the binding constraint and the audience is accessible, online fields faster and at volumes a seat-limited phone room cannot match.

MODE EFFECTS CUT BOTH WAYS

Choosing telephone is not free of risk: the presence of an interviewer can introduce **social-desirability and acquiescence effects** on sensitive items, and aural-only presentation changes how scales are answered relative to a screen.¹ These are manageable with trained interviewers and careful instrument design — but they are real costs to weigh, not reasons CATI is always safer.

05 EXECUTION

Selecting the mode is half the decision; executing it is the other half.

Choosing CATI for the right reasons does not, by itself, produce good data. The advantages that justified the mode — reach, cooperation, control, candour — are realised only through disciplined execution. The conditions in Section 02 say whether to use telephone; the practices below decide whether it works.

What turns a CATI design into clean data

- ◆ **Standardised interviewing** — a tested script, consistent administration, and dynamic skip logic so every respondent meets the same instrument.
- ◆ **Real-time monitoring** — live oversight of interviews and interviewer performance, the human-oversight expectation embedded in research standards.
- ◆ **Pre-field piloting** — a soft launch to validate script flow, timing, and screener logic before full fielding.
- ◆ **Interviewer training** — rapport and neutrality together, so cooperation rises without the interviewer steering the answer.

Why execution is the quality control

Telephone's integrity advantage is not automatic — it is produced by the monitored, auditable process around the call. Standardisation controls measurement error; monitoring and piloting catch problems while they are still cheap to fix. These are exactly the conduct and quality-management practices that recognised service standards exist to specify, which is why a buyer can ask for them in consistent terms.^{3,4}

BUYER'S QUESTION

Ask a telephone partner: **“What share of interviews is monitored, how is the script piloted, and how are interviewers trained to keep rapport from becoming influence?”** The answers separate a managed CATI operation from a phone bank.

06 BEFORE YOU BRIEF

Five things to settle before you brief a CATI partner.

Once the scorecard points to telephone, the quality of the engagement is set early — in the brief, not the field. The five items below are what a good partner will need to scope feasibility, cost, and timeline accurately. Settling them before the conversation turns a vague request into a study a partner can actually model.

01	Population & frame	Define exactly who qualifies and whether a reachable sampling frame or list exists. Telephone needs numbers to dial; the absence of a usable frame is a feasibility question to raise first, not discover mid-field. ASK YOURSELF · WHO, PRECISELY — AND CAN THEY BE REACHED BY PHONE?
02	Instrument length & complexity	Share the expected length, branching, and any stimulus needs . Long or complex instruments are a reason to use CATI — and they drive interview time, training, and whether screen-sharing is required for visuals. ASK YOURSELF · HOW LONG, HOW BRANCHED, AND DOES IT NEED TO BE SEEN?
03	Languages & geographies	Specify markets, languages, and calling windows . These set interviewer staffing, time-zone scheduling, and the realistic field period far more than raw sample size does. ASK YOURSELF · WHICH MARKETS, WHICH LANGUAGES, CALLABLE WHEN?
04	Quota & incidence assumptions	State target quotas and your best incidence estimate , and treat the resulting feasibility as a modelled range, not a guarantee . Honest incidence assumptions are what make a turnaround estimate meaningful. ASK YOURSELF · WHAT INCIDENCE AM I ASSUMING, AND IS IT EVIDENCED?
05	Quality & monitoring expectations	Make explicit your monitoring share, validation, and — for mixed-mode — mode-flagging requirements, so quality is scoped into the design rather than bolted on after delivery. ASK YOURSELF · WHAT MUST BE MONITORED, VALIDATED, AND FLAGGED?

WHERE THIS SERIES GOES DEEPER

No. 135	HCP mode-choice. The same decision applied specifically to physician and healthcare-professional audiences.
No. 140 · 141	Screen-sharing & mixed-mode. Bridging telephone reach with visual stimuli, and combining CATI with an online core.
No. 142	Respondent validation. Confirming a respondent is who they claim — the QC playbook behind the integrity advantage.

▲ CONCLUSION

Choose the mode the audience and the instrument require.

CATI is neither obsolete nor universal. It is the right primary mode when the audience cannot be covered or recruited online, when screening is complex and incidence low, when the instrument is long or the topic sensitive, or when integrity must be auditable — and it is the wrong one when the audience is fully online, the instrument short, or visual stimuli central. The discipline is to decide on those grounds, count the conditions honestly, and let the answer — not the unit price — set the mode. Used that way, telephone stops being a legacy line item and becomes what it should be: a deliberate choice for the studies that need it. Recognised conduct and service-quality frameworks let buyers ask for that rigour in consistent terms.^{3,4}

§ REFERENCES

- [1] Dillman, D. A., Smyth, J. D., & Christian, L. M. **Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method**. 4th ed. Hoboken, NJ: John Wiley & Sons, 2014. (Mode effects, mixed-mode design, and the case for reintroducing the telephone.)
- [2] Groves, R. M., Fowler, F. J., Couper, M. P., Lepkowski, J. M., Singer, E., & Tourangeau, R. **Survey Methodology**. 2nd ed. Hoboken, NJ: John Wiley & Sons, 2009. (Total survey error: coverage, nonresponse, and measurement.)
- [3] ICC/ESOMAR. **International Code on Market, Opinion and Social Research and Data Analytics**. ICC & ESOMAR. (Standardised conduct and human oversight of fieldwork.)
- [4] International Organization for Standardization. **ISO 20252:2019 — Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements**. Geneva: ISO, 2019.

References are cited for the survey-methodology frameworks and conduct standards they establish — total survey error, mixed-mode design, and quality-management requirements — not for any operational figure transferred to this paper. This paper publishes no feasibility, incidence, or completion-rate statistics; any such number is study-specific and should be modelled from a defined population, frame, and instrument. “Aligned to ISO 20252” denotes conformance with the standard’s framework, not third-party certification; any third-party certification is modelled feasibility range, not a guarantee.

Tell us the audience and the instrument — and we’ll help you decide whether CATI, online, or mixed-mode 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 and online panel sample from a single point of contact, applying one screener logic and a common quality standard across both modes so that mode is chosen on fit, not on which team is easier to brief.

For telephone work we field standardised, monitored interviews with pre-field piloting and interviewer training as the default, and we mode-flag mixed-mode studies for clean analysis.

Compliance posture: our methodology is aligned to the ESOMAR Code and Guidelines and the ISO 20252 framework, and we are certified under the EU-U.S., UK, and Swiss Data Privacy Frameworks, with personal data siloed from response data.

CATI

MODE SELECTION

MIXED-MODE

TOTAL SURVEY ERROR

ESOMAR CODE

ISO 20252

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