Market Researcher's Guide to CATI Research

Read our ebook to learn what is CATI, why it is important and when it should be used

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Introduction

Thank you for downloading our ebook, The Market Researcher's Guide to CATI Research.

In recent years we realized that CATI started making a comeback after being displaced for a little while. As a CATI solutions specialist, we want to help Market Researchers out there who conduct CATI or are planning to do so. That's why we collected some useful information about CATI, and created this ebook for you.

So, how will this ebook help you? On the next few pages we will cover some of the most often asked CATI related questions.

We hope you find value in the content and the tips we've shared here. If you have any questions about CATI, don't hesitate to contact us. We are always happy to have discussions about market research.

Enjoy reading!

Background

Back in the days most quantitative research was administered by interviewing staff via paper-and-pencil, but it was a time-consuming and error-prone method of data collection. Then, with the introduction of computers into the research arena, the potential of survey research exploded. Once computers were added to the mix CAPI (Computer Assisted Personal Interviewing) and CATI (Computer Assisted Telephone Interviewing) were a huge step in alleviating the aforementioned concerns.

It's somewhat difficult to convey they enthusiasm with which technology facilitating data collection was welcomed into the Market Research Industry. Research suppliers enjoyed being able to efficiently streamline elements of the research that had previously been costly and time-consuming. Clients were enthusiastic about what they perceived to be a higher degree of sophistication and precision in their studies - and, of course, they were thrilled about the savings in time and money that the new technology conveyed!

So what is CATI exactly?

CATI (pronounced „Katie" or „Catty") or Computer-Assisted Telephone Interviewing is one of the first data collection methodologies to introduce technology to the Market Research interview process.

As its name implies, CATI interviews are conducted by telephone and the questionnaire is pre-programmed into an individual computer or onto a computer network, using specialized software. A CATI questionnaire includes question text, interviewer instructions, and skip logic.

During a CATI interview, a respondent and the interviewer are typically speaking to one another via telephone.

Instead of administering the survey from a hard-copy paper survey, the interviewer reads each question to the respondent exactly as it appears on the screen of the computer, and enters the respondent's answers directly into the questionnaire program in real time as the survey progresses. Pre-programmed „skips" ensure that the correct question are asked, according to the specific responses provided by the participant. The interviewers have the ability to probe for information and it is more 'interactive' than self completion methods.

Transition to online research

As technology has grown more sophisticated, researchers have transitioned to using online questionnaires more and more frequently for quantitative Market Research studies. As online research came into its own, both research vendors and clients realized that the newer methodology offered many advantages over CATI to both researchers and respondents:

• Quicker, better-targeted „bulk mail" recruiting via email blasts.
• Cost-effective AND efficient.
• Respondents may complete online surveys - using their computers, tablets, or smart phones - at any time of the day or night that's convenient for them.
• Respondents are able to view and react to visual elements of print ads or evaluate prospective logos.

So as other, more sophisticated data collection and tabulation methods were developed, CATI was put on a „back burner" in favor of these newer technologies.

All in all, researchers sought a more seamless, increasingly holistic approach to the art and science of Market Research - one that allowed them to „bundle" diverse qualitative and quantitative approaches together when indicated. In response to these needs, they created a hybrid methodology that combined the best of what CATI and online research had to offer. This new approach allows researchers to meet increasingly complex client objectives and disparate information needs.

Why has CATI returned?

CATI is resurfacing, and its reappearance is absolutely not a matter of nostalgia! Instead, innovative, smart research industry veterans began to realize that online research - for all of its advantages - has distinct drawbacks, as well.

Interaction between the research team and the research participant, which had been perceived as a disadvantageous element for quite a few years, was, for the first time, recognized as offering inherent benefits as well:

• Researchers realized that including a mechanism that would allow the respondent to ask questions would be useful.
• And they realized that allowing for ease of respondent/researcher interaction would also enable more in-depth „digging" into specific areas or issues by the research team.
• Not incidentally, a knowledgeable researcher will be able to encourage the respondent to offer valuable insights that provide a „deeper, more qualitative dive" into his or her more black and white responses.
• They also realized that a diverse and/or balanced sample spread was not always guaranteed by mass emailing.
• There was also the possibility of 'savvy' respondents altering demographics to either quality for an incentivized study, or experiment with the survey by trying different survey 'paths'. This is more evident the higher the incentive offered to a respondent.

And then there's the issue of our increasingly global society. Target audiences can no longer be assumed to speak the same language or even to live on the same continent. Clients are interested in very specific demographic and ethnographic details about the members of the various subgroups that comprise their target market. Thus, the world has become both smaller and larger at the same time.

One result of increased globalization is that some degree of survey customization is frequently required. This allows the specific questions, idioms,

and cultural touchstones used within each market surveyed to be authentic and relatable to the respondents falling within that group. It is much more difficult to manipulate programming for an online survey than it is to redirect a respondent to speak with a „live" individual who is able to speak their language and tailor the interview to their specific responses.

Whether the research is being conducted in a single country, or in many countries across the globe, there is a need for a degree of agility within virtually every element of the study. Market Research requires an increased nimbleness and flexibility - within the survey, within the research team, within the study deliverables - that has never before existed.

Those innovative, smart research industry veterans we mentioned previously became increasingly aware of those issues. They realized that tethering the respondent to a computer to complete a static questionnaire - and having that exercise comprise the sum total of the „research effort" - was no longer sufficient or practical.

Clients' information needs were, for all intents and purposes, no longer being met. What was needed, these researchers realized, was the ability to allow the respondent to complete various types of tasks that were not necessarily all conductive to being completed via an online-only methodology.

For example, perhaps the respondent would complete a CATI screener survey of five or ten minutes, providing the quality checks on respondent, before completing an online survey then, based upon their online responses, they might be jettisoned off to a third „portal" to watch a video and respond to that. These types of methodological acrobatics required technology beyond the online-only approach that was so popular among research suppliers and clients.

Mixed-mode research

Mixed-mode research allows you to switch between modes seamlessly within a single survey. For example, the survey could be started within CATI, with the respondent instantly sent a URL to enable him to continue the study in WAPI. This approach allows the research team to leverage specific advantages of different survey methods, and tailor each survey to use the methods that are optimal in light of the study objectives and target respondent audience for that particular survey.

The advent of mixed-mode research saw the first move towards the CATI/Online hybrid: the methodology was, truly, that „better mousetrap". It was different and still delivers more value than any other quantitative data collection method in the marketplace.

This meant that respondents could be pre-screened through a telephone script, with the quality control element focused on the recruitment aspect, and immediately sent a link to a web survey, so that the benefit of the online cost savings were also realized. This methodology led to many agencies exploring new ways of working: Telephone recruitment for hall tests, group discussions and other qualitative work could now be streamlined with the 'screened' participant choosing their venue/timings online.

However, this was very much an outbound form of interviewing, and still had some restrictions:
• Interviews are instigated by the interviewer, not the respondent.
• Once the respondent is in the web survey, there was no easy way to re-contact the interviewer.
• Respondents could 'drop-out' at the switch in mode, if not accessible at that time.
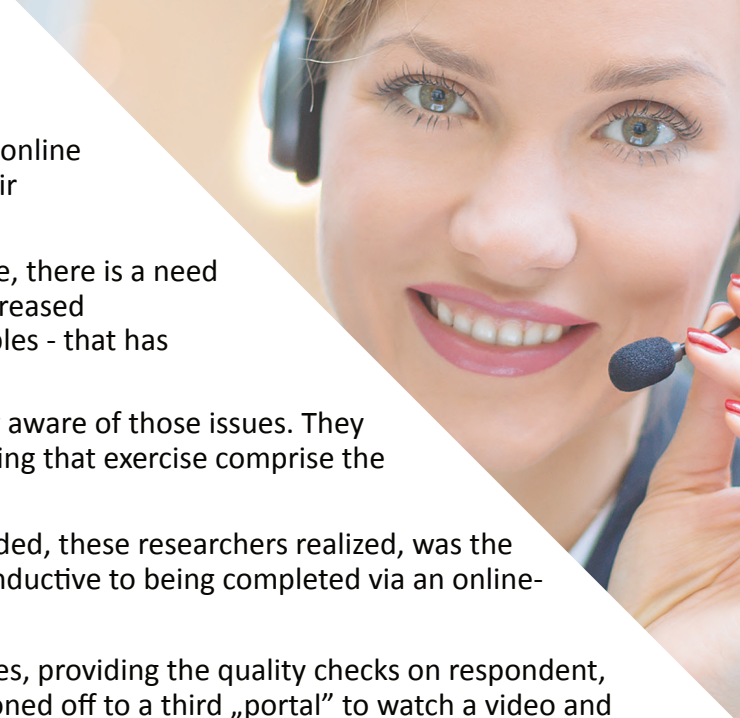
The next generation of mixed-mode

It was highly unusual for a single interview to „jump" from mode to mode of administration... an interview that started out online almost certainly remained online for its duration, with at most a single switch from telephony to online.

The next generation of CATI/Online hybrid allows a client to customize the interview so that a respondent is exposed to a topic or line of questioning via the most effective, most relevant method for them, regardless of mode. The development of online/in-browser enabled telephony (the almost ubiquitous 'call me' button on a web page) meant that software providers are again challenged to develop greater flexibility, and ultimately easy of use, for Research agencies. The technology is now such that, regardless of device, telephony and screen sharing can be instigated, by both interviewer and, more importantly, respondent.

So, an interview may very well begin online, the respondent may then be asked to dial a phone number, or even choose to click a button at any tie, so that they are in direct contact with a „live" interviewer who can assist them with the survey or provide additional insight. The respondent may, during this process, have the interviewer screen 'shared' and find that he or she is evaluating potential advertisements on their device.

And all of this can be accomplished in the respondent's native language, on virtually any combination of electronic media imaginable, and during a day and time that is most convenient for that individual. Intriguing, isn't it?

Agencies are able to identify a business issue to be explored or question to be answered, design and program a survey in-house, and have results with unsurpassed speed... in some instances before they would have been able to review vendor-submitted responses to an RFP.

It was almost always necessary to make allowances and compromises, because adapting the study to work optimally in every market being surveyed was, more often than not, too costly, too error-prone, and too time-consuming.

This hybrid methodology returns the control of the process to the place where it makes the most sense: The agency's research and brand teams: If there are three countries being surveyed, and online penetration is low in Country A, but typical in Countries B and C, it's much easier than it used to be to „switch gears" and administer that portion of the survey via telephony in Country A.

All decision-making, programming, and controls are housed centrally with the agency, while the flexibility to choose mode, and to switch at any time, is given to the respondent.

Whilst the next generation of CATI/online hybrid offers new challenges, it also created new opportunities.
• Fieldwork agencies will be 'always available' to take an inbound respondent call.
• Respondents will be in full control of the mode they wish to choose.
• Data and survey control will be centralized.
• Possibilities of sharing stimuli, and enhanced questions, will offer leading agencies new survey channels.
• Possibility of making VOIP calls with hosted dialers will increase productivity.

Future CATI: Concurring InterViewing Modes

The advent of in-browser telephony capabilities not only provides new challenges, but the ability to be connected with a respondent in multiple modes, at the same time, provides even greater opportunities for adapting current research methodologies to improve efficiency or create new research methodologies. Imagine being able to show a product concept to a respondent whilst interviewing them via CATI. Not only being able to see the interaction with the product, but capturing the emotion via webcam and asking probing questions, all remotely.

The future possibilities of CATI are no longer limited by technology!

About Us

Enghouse Interactive (EI), a subsidiary of Enghouse Systems Limited (TSX: ENGH), is a leading global provider of contact center software, services, and video solutions, serving thousands of customers for over 35 years. Enghouse Interactive solutions enable customers to deliver winning customer experiences by transforming the contact center from a cost center into a powerful growth engine.

Enghouse Interactive's core values — Reliability and Choice — are key differentiators in the global marketplace. Reliability speaks to Enghouse Interactive's reputation for consistently honoring its commitments to its customers, staff, partners, and investors. Choice is reflected in the unparalleled breadth of its CX portfolio, which enables customers to choose from a wide array of solutions, whether deployed on-premise, in the cloud, or on a hybrid platform. By leveraging a broad range of technologies and capabilities based on open standards, Enghouse Interactive simplifies the advanced integrations customers require.

Respecting local regulatory requirements, and supporting any telephony technology, Enghouse Interactive ensures that its customers can be reached by their customers — anytime, anywhere, and via any channel.

Contact us to Learn More

With over 35 years of deep contact center expertise, our team of experts are ready to optimize a solution that's right for your contact center, today and tomorrow.

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