

Telephone Surveys vs. Site Visits: Can Researchers Rely on Self-Reported Data?

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Introduction

Evaluations, market characterization, and market potential studies often seek to understand the market saturations and/or market share of energy-efficient products. Because reliable sales data are rarely available, researchers typically rely on telephone survey data as a first step. The validity of this data, however, is often questioned: can consumers accurately report whether or not equipment they own or have recently purchased is energy efficient? Due to concerns about the validity of self-reported data, researchers often follow up telephone surveys with site visits, which require a tremendous effort and expenditure. If researchers could know, a priori, which self-reported data are reliable, they could potentially avoid conducting a significant number of costly site visits.

Research to Address the Issue

This poster presents results from some of our recent studies that compare telephone survey and site visit results. These studies examined different energy-efficiency measures and different levels of maturity in program activity. They include:

- A recent lighting audit that compared self-reported saturation of CFLs from telephone surveys with in-home audit data. The study included states with mature CFL programs, more recent CFL programs, and states with no CFL programs at all, and examined differences across these different levels of program activity.
- A recent market characterization study that compared self-reported purchases of ENERGY STAR appliances—refrigerators, clothes washers, dishwashers, and room air conditioners—to a validated (through in-home visits and make/model lookups) examination of ENERGY STAR appliances actually found on site.

Policy Implications

Relying on self-reported data that may have substantial inaccuracies could lead to spurious study conclusions. Alternatively, conducting site visits that simply confirm telephone survey responses is an expensive and laborious process. Understanding when site visits are necessary—and when they are not—can lead to more efficient, cost-effective evaluations, market characterization, and potential studies.