

DEEP DISH: IN-DEPTH INTERVIEWS ACROSS DIVERSE POPULATIONS

Lauren Abraham, NMR Group, Inc.

In-depth interviewing is a research technique that is frequently used in program evaluation to collect information to answer key research questions. For most topics, in-depth interviewing does not require a great deal of specialized training or equipment, and can elicit insightful information when carried out by an effective interviewer. A key challenge with this research technique, and a substantial factor in its cost, is gaining the cooperation of targeted interviewees.

This poster presents an analysis of the effort required to reach in-depth interview completion goals with interviewee populations of importance to energy-efficiency program evaluation, such as program staff, market actors, and policy makers. The analysis is based on over two hundred in-depth interviews conducted between January 2010 and December 2016 for a variety of energy-efficiency program evaluations. At the time of the interview, the in-depth interviewees were located in a dozen states and provinces and fell into one of the following populations:

- Program administrators
- Program implementers
- Residential real estate developers
- Home builders
- Municipal code officials
- City councilors
- Corporate retailers
- Store managers
- Chain restaurant managers
- Architects
- Window contractors
- Insulation contractors
- Energy audit contractors
- HVAC contractors
- HERS Raters
- Lighting manufacturers
- Program participants

We rank these interviewee populations by the relative difficulty of getting a completed in-depth interview with them. The metric used to rank the populations is total interview requests divided by total completed interviews, or average interview requests per completed interview. Interview requests take the form of conversations, emails, and voicemails. The ranking of interviewee populations is presented in a bar chart that displays the proportion of average interview requests that were conversations, emails, and voicemails. Populations such as program administrators, program implementers, program participants, and lighting manufacturers are among the easiest to complete an in-depth interview with. They required less than five interview requests per completed interview. Building trades populations such as builders, building contractors (window, insulation, energy audit, HVAC installers, and HERS raters), and municipal code officials required around ten interview requests per completed interview. Populations that were the most difficult to complete an in-depth interview with include city councilors, residential real estate developers, and chain restaurant managers. Each of these populations required more than 35 interview requests per completed interview.

In a series of additional tables and graphics, we present factors associated with these populations that may have affected the average interview requests per completed interview. These factors include interview length, the presence of interviewee incentives, the quality of the sample, and other factors specific to certain populations. We also present the refusal rate and an estimate of the scheduling cost per complete. While we are not able to draw broad conclusions about the populations given the limitations of our sample, we are able to share lessons learned and practical tips based on our experience completing these in-depth interviews.

Deep Dish: In-Depth Interviews Across Diverse Populations

Lauren Abraham, NMR Group, Inc

Average Requests per Completed Interview

| | |
|--------------------------------|------|
| Health Experts (n=4) | 3.3 |
| Program Administrators (n=26) | 3.7 |
| Lighting Manufacturers (n=4) | 3.8 |
| Program Implementers (n=6) | 3.8 |
| Social Service Providers (n=3) | 4.0 |
| Program Participants (n=10) | 4.3 |
| Architects (n=3) | 5.0 |
| Corporate Retailers (n=10) | 6.0 |
| Store Managers (n=25) | 6.1 |
| Building Contractors (n=35) | 9.4 |
| Builders (n=7) | 10.9 |
| Code Officials (n=13) | 12.8 |
| City Councilors (n=3) | 35.3 |
| Residential Developers (n=6) | 39.5 |
| Restaurant Managers (n=2) | 85.5 |

Fewer than 5 Average Requests per Complete

| Population | Estimated Length | Average Length | Incentive | Refusals | Scheduling Cost per Complete |
|--------------------------|------------------|----------------|-----------|----------|------------------------------|
| Health Experts | -- | 44 | -- | -- | \$33 |
| Program Administrators | 45 | 42 | -- | -- | \$37 |
| Lighting Manufacturers | 30 | 27 | -- | -- | \$38 |
| Program Implementers | 60 | 63 | -- | -- | \$39 |
| Social Service Providers | -- | 62 | -- | 13% | \$41 |
| Program Participants | 30 | 18 | -- | -- | \$44 |

accustomed indebted institution
mandatory research
office expert
professional uninterested
 Average Individuals Contacted per Complete

5 to 20 Average Requests per Complete

| Population | Estimated Length | Average Length | Incentive | Refusals | Scheduling Cost per Complete |
|----------------------|------------------|----------------|-----------|----------|------------------------------|
| Architects | 45 | 19 | \$100 | 25% | \$51 |
| Corporate Retailers | 15 | 24 | -- | 5% | \$61 |
| Store Managers | 15 | 9 | -- | 5% | \$62 |
| Building Contractors | 45 | 26 | \$50 | 1% | \$96 |
| Builders | 45 | 23 | \$100 | 11% | \$110 |
| Code Officials | 45 | 26 | \$100 | 8% | \$130 |

mobile
customer service
professional
busy
trades
 Average Individuals Contacted per Complete

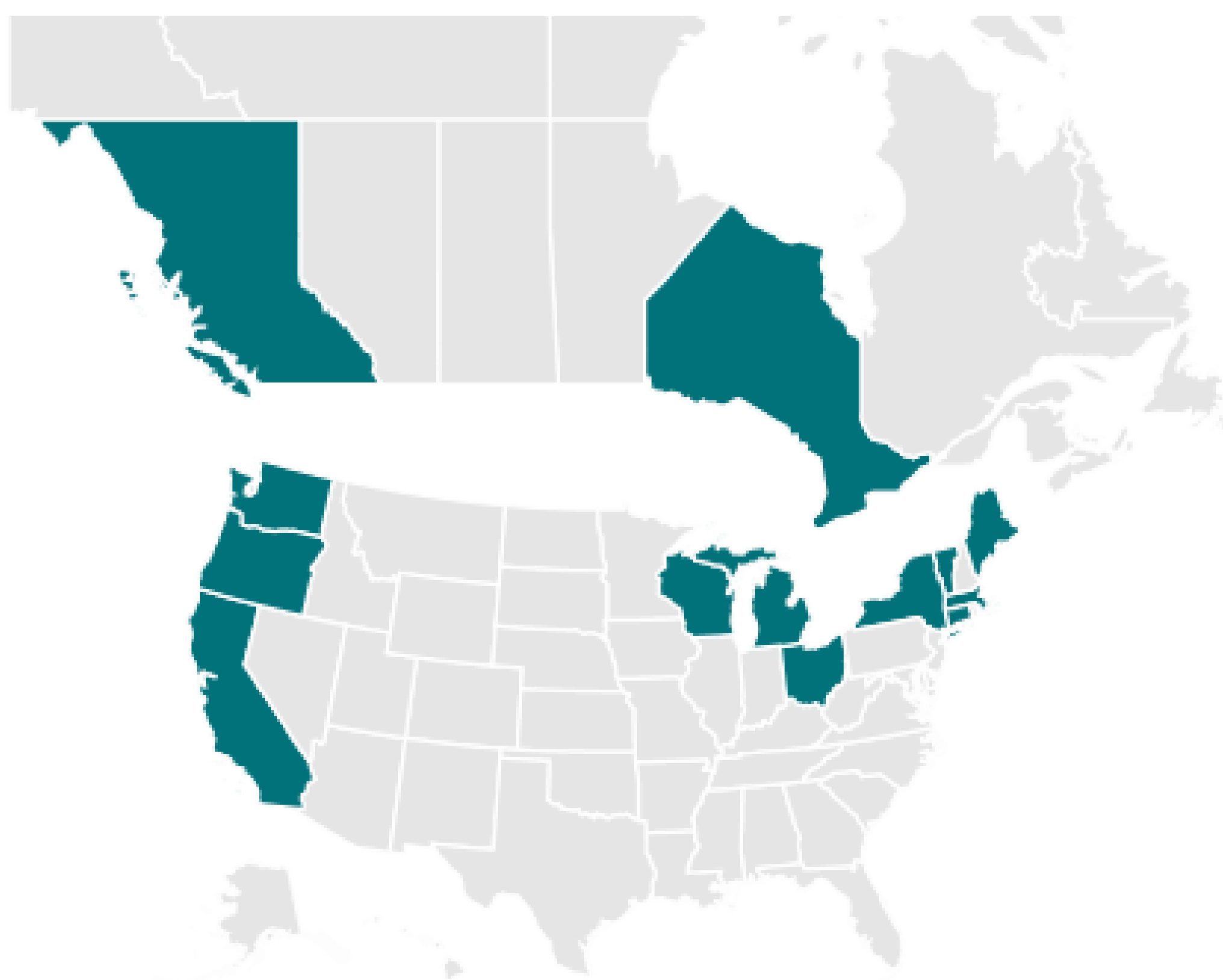
More than 20 Average Requests per Complete

| Population | Estimated Length | Average Length | Incentive | Refusals | Scheduling Cost per Complete |
|------------------------|------------------|----------------|-----------|----------|------------------------------|
| City Councilors | 45 | 20 | \$100 | 31% | \$360 |
| Residential Developers | 20 | 31 | \$100 | 8% | \$403 |
| Restaurant Managers | 30 | 21 | \$50 | -- | \$872 |

office
turnover
professional
uninterested
skeptical
civil servant
wrong person
 Average Individuals Contacted per Complete



Over **200** in-depth interviews conducted between 2010 and 2016 with individuals located in a **dozen** states and provinces



1500 Total Interview Requests

650 Emails

600 Live Requests

250 Voicemails

Lessons Learned

Populations with a **vested interest** in the evaluation or that are **accustomed** to being interviewed are more likely to agree to an interview.

Busy populations require more interview requests per complete, and are reluctant to agree to **lengthy** interviews.

Inaccurate or **small samples** relative to completion goals can substantially increase scheduling costs.

Financial incentives tend to be less effective with **higher income** populations.

Civil servants cannot accept financial incentives over a certain amount.

Practical Tips

- ✓ Match communication method with population
- ✓ Try calling during various days and times of day
- ✓ Use mail merge to save time emailing interview requests for large samples, but make sure to control for bias
- ✓ Know how much \$ civil servants can accept
- ✓ Keep it brief for busy populations
- ✓ Budget more for populations with deficient or nonexistent sample data
- ✓ Budget more for small samples relative to completion goals
- ✓ Let them hear your smile 😊

NMR
Group, Inc.

Lauren Abraham
labraham@nmrgroupinc.com
617-284-6230 x17
Fax: 617-284-6239
www.nmrgroupinc.com