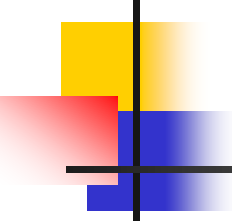


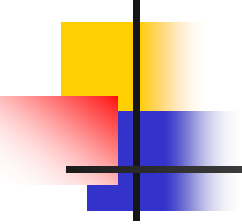
Recall Period in CE Surveys Program

Norman M. Bradburn
CE Survey Methods Workshop
December 8-9, 2010



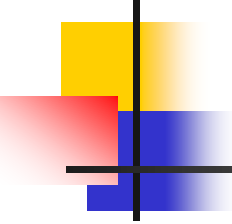
Question-Answering Process

- 1. Comprehending question
- 2. Retrieving relevant information
- 3. Formulating an answer
- 4. Formatting and editing the answer



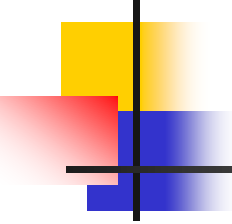
Retrieving Relevant Information

- Event must be encoded in memory
- Cues important in aiding recall
- Cues may come from wording of question, lists, context
- Recall takes time. The more time the better the recall



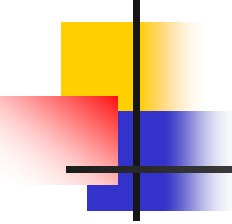
Key Aspects of Recall

- Context
- Frequency of events
- Shape of forgetting curve
- Reference period
- Telescoping



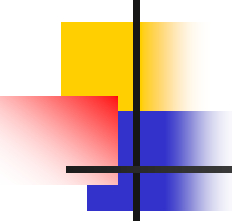
Low Item-incidence Levels

- Two approaches:
 - Vary recall period
 - Vary sample size



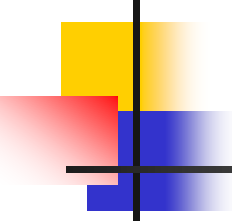
Best Practices for Determining Recall Period

- Minimize net relative error from omissions and telescoping
- Negative Exponential function ae^{-bt}
fits much expenditure data (t is time, a and b are constants that vary by expenditure type)



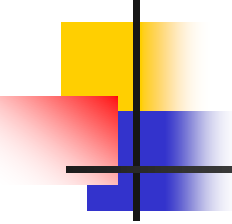
Grouping Questions

- Minimize cognitive effort
- Group by event sequences
- Group by expenditure setting
- Group by recall period



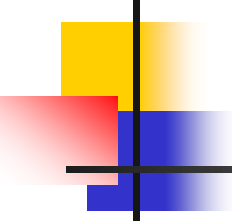
Next Steps

- Review findings on context effects on consumer expenditures
- Explore effects of different groupings
- Test hypotheses about groupings in laboratory and field
- Do field test to determine operational feasibility



Proposed Survey Design

- Conceptually separate surveys with different groupings and recall periods
- Sample sizes determined by desired level of precision
- Panel surveys to reduce telescoping
- Questionnaire as a matrix



Additional Issue

- Events cannot be recalled if they were never encoded
- Price of goods purchased with credit cards may not ever be encoded separately. Only total for mixed basket of goods may be encoded, if that