Data Collection Procedures for Winter Heating Fuels Telephone Survey
State Heating Oil and Propane Program (SHOPPP)

Office of Energy Statistics
Office of Petroleum & Biofuels Statistics
Petroleum Marketing Statistics Team
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Presentation Roadmap

• Survey Overview
• Getting Started
• Pricing Characteristics
• Collecting Additional Information
• Weekly Data Submission
• Weekly Data Collection Tips
• Data Confidentiality and Security
Overview: SHOPP

What is SHOPP?

• State Heating Oil and Propane Program (SHOPP)

• Cooperative data collection effort between the U.S. Energy Information Administration (EIA) and State Energy Offices (SEOs)

• The only survey like it within the EIA
Overview: The Survey

SHOPP’s EIA-877 Winter Heating Fuels Telephone Survey

Purpose:

• Designed to collect data on state-level prices of residential propane and No. 2 heating oil during the heating season (October through March)

Who Uses Survey Data?

• Data used by state and federal governments, policymakers, industry analysts, press, and consumers

• Winter heating fuels price data continues to be one of the most requested datasets produced by EIA
Overview: Survey Data

Data collection

• EIA and states contact retail heating fuel outlets weekly via phone or email and obtain price data

• Data are due by Noon EST on Tuesday, except when Monday is a holiday in which case data are due on Wednesday

• Data from some of the larger propane companies are provided directly to EIA, which may reduce the number of calls SEOs have to make

• Prices entered into EIA’s Internet Data Collection system

• Both EIA and SEOs have the responsibility to protect data at the respondent level
Getting Started
First Steps

• Contact the SHOPP Operator with your name, phone number, & email

• Make sure you have a valid login for the Internet Data Collection (IDC) system

• Confirm access to the IDC

• Review the list of respondents for your state
IDC: Login

Welcome to the EIA Single Sign On Login System

- All Internet Data Collection applications will be unavailable the first and third weekends of the month between 12:00 am Eastern Time on Saturday and 6:00 am Eastern Time on Sunday.
- All Internet Data Collection applications are unavailable the third Thursday of the month from 8:00 pm until 10:00 pm Eastern Time.
- Due to recent software upgrades to the electricity surveys you may encounter warnings related to the "applications digital signature" or the "application requiring an earlier version of the Java plug-in". If you receive any of these warnings please press the "Rerun" button to continue. We regret any inconvenience this may cause.
- The OLEJR survey is suspended temporarily due to recent reductions in appropriations for the U.S. EIA. EIA will seek authorization for a revised version of the Monthly Electric Imports and Exports Report survey. EIA will notify you concerning your filing responsibilities under the revised form. Please contact the survey manager, Michelle Bowles, at Michelle.Bowles@eia.gov with any questions.
- The opening of the 2013 annual data collection cycle for the following annual forms has been delayed:
  - Form EIA-830, Annual Photovoltaic Cell/MODULE Shipments Report
  - Form EIA-969, Annual Electric Generator Report
  - Form EIA-861, Annual Electric Power Industry Report
  - Form EIA-851S, Annual Electric Power Industry Report (Short Form)
  - Form EIA-923, Power Plant Operations Report (Annual Respondents)
- The following monthly forms continue to open on their regular schedule:
  - Form EIA-869M, Monthly Update to the Annual Electric Generator Report
  - Form EIA-851M Monthly Utility Sales and Revenue Report with State Distributions
  - Form EIA-923 Power Plant Operations Report (Monthly Respondents)

Userid: 
Password: 

Login

Register for a Userid  Forgot your password?  Forgot your Userid?

- Open the Internet Data Collection (IDC) system: https://signon.eia.doe.gov/ssoserver/login.

- Sign into system with your Userid & Password
IDC: Login

- Select “EIA-877 Winter Heating Fuels Telephone Survey”
Select “Go To Main Form”
Select desired reference period
- Source of respondents
- Sort outlets by completion status, ID, or by company name
- Data entered under “Price ($/gal)”
Getting Started: Pre-Season Contact

- State Energy Office to contact respondents prior to the season’s start

- Identify a contact person and back-up (if possible) who will provide data from week to week
  - Familiar with survey’s weekly data requests

- Build a working-relationship with respondents (establish trust)
  - More likely to report the correct price
  - Improves data consistency from week to week
  - Reduces the amount of time it takes to complete calls

- Agree upon a method (or request) for collecting data
  - Improves data consistency from week to week

- Make notes in the IDC about contact person and method for collecting data
• Note in “Comments” section: This tier-level price (range) best meets the survey’s criteria

• Determined during preseason contact with the respondent
Price Characteristics
Price Characteristics

- Prices of Residential Propane and/or No. 2 Heating Oil

- Residential customers - individual customers or households who use the fuel to heat their residences
  - “Residential Sales” do not include apartment buildings, multi-family dwellings, businesses, or institutions
Price Characteristics

• Respondents should report data for the particular retail outlet being surveyed
  – Prices can vary from outlet to outlet
  – Identify the outlet being targeted by stating which city the outlet is located
  – Location-specific information found within the IDC on “Main Form” screen

• Report prices in dollar amounts
  – rounded to the nearest thousandths (e.g., $1.259)
  – EIA has changed the practice of reporting petroleum marketing data in cents
  – Reflected in all EIA publications
Price Characteristics

• Price based on a “leased” or “company-owned tank”
  – Majority of heating fuel customers do not own their tanks
  – Customer-owned tank prices tend to be less than the “market price”

• Price should exclude:
  – Taxes
  – Discounts
  – Premiums paid for small or large volume purchases
  – Surcharges for customers living outside the normal delivery area
Price Characteristics

• Collect the “Charge” or “Full-Credit” price
  – “Going Rate”
  – “Market Price”
  – Typically do not contain discounts

• Cash prices
  – Include discounts or incentives
  – Generally $0.05 to $0.10 per gallon difference
  – Lower / more attractive price
  – We do not want the cash price!
Propane Marketing & Pricing

• Price per gallon sometimes based on annual consumption

• Tier-level or product code
  – Establish annual consumption rate for average residential customer
  – Choose the tier-level that corresponds with that volume
  – Avoid asking for usage-per-season ranges that are round numbers (e.g., 1,000 gallons)

• Record tier-level and product code information used when collecting price data within the “Comments” section of the IDC

• Goal - weekly data consistency
Propane Marketing & Pricing

Targeting which price to collect from a specific outlet:

• Statewide average – annual consumption rate per residence
  – Can help target the pricing tier that best reflects that outlet’s residential market

• Statewide average - tank size per residence

• If unknown: identify outlet’s average tank size or annual consumption rate for its residential customers

Source: Today In Energy [http://www.eia.gov/todayinenergy/detail.cfm?id=4890&src=email](http://www.eia.gov/todayinenergy/detail.cfm?id=4890&src=email)
Collecting Additional Information
Survey Comments (current week)

- “Add Survey Comments”
- Survey Operator reviews entries weekly
Survey Comments (current week)

- Special notes for week only
- Prices, data verification, company issues, etc.
- Notes do not carry over from week to week
Company Contact Info

- “Change Co. Contact Info” option
Company Contact Info

- Company contact information
- Notify EIA SHOPP Survey Operator of any updates
- Collect emails from contacts of all company outlets
Weekly Data Submission
Price Review Pre-submission

• “Review Prices Before Submit”
Price Review Pre-submission

- Flagged companies will be listed
- Review the companies with price differences greater/lesser than expected
- Chance to call respondent for verification
Data Submission

- Select “OK”
- Final prices submitted to EIA
- Prices subject to change pending further analysis/validation calls
- EIA will notify the SEO of any data adjustments
Weekly Data Collection Tips
Weekly Data Collections

Before a call is made:

- **Review previously reported data**
  - Utilize the IDC (refer to IDC slides)
  - Company History report is helpful

- **Look for consistencies or noticeable trends that may be emerging**
  - (e.g., $3.520, $3.530, $3.540)
  - (e.g., $3.490, $3.490, $3.490, $3.490)
Weekly Data Collection Tips: Calls to Respondents

• **Take your time** while speaking with respondents
  – Don’t rush off the phone
  – Calls can still be completed within a reasonable amount of time

• **Pay attention to the data being reported by the respondent**
  – Ask the respondent questions about the data being reported

• **Difficult respondents who are noncompliant**
  – Contact the SHOOPP Operator
  – We will work together to resolve issues
  – Streamline a process for collecting future data
Weekly Data Collection Tips: Errors

• Common errors made by respondents
  – Quote wrong prices from company’s price list
  – Quote wrong product code number or tier-level price

• Objective = catch errors as they occur

• Verbalize the price difference by restating it in the form of a question
  • (e.g., $3.590? Did your residential propane really increase by twenty cents from last week to this week?)
  • (e.g., $3.490? That is a decrease of 20 cents from last week. This is a counter-trend movement compared with what we are seeing reported elsewhere within the state. Did your heating oil really decrease in price by 20 cents?)

• Questions like these force the respondent to think more carefully about the data they are reporting

• Asking questions at time of first call reduces the amount of disruption to daily operations later in the processing cycle
Weekly Data Collection Tips: Timely Submission

• Data submitted by Noon EST on Tuesdays during normal collection cycles
  – Encouraged to submit data earlier

• Several in-house data validation & pre-publication tasks
  – Between the hours of Noon EST and 6:00 pm Tuesday
  – Publication deadline - Wednesday morning 10:30 am

• Contact the SHOPP Operator if your office is having trouble
  – Don’t wait until Noon EST Tuesday

Source: Heating Oil & Propane Update http://www.eia.gov/petroleum/heatingoilpropane/
Data Confidentiality and Security
Data Security

• **Data security** means protecting data from being compromised and deterring the unwanted actions of unauthorized users

• Both EIA and SEOs share the responsibility to protect data at the respondent level

• Company-level information is NOT to be shared with respondents
  – Mass emails are not encouraged
  – Respondents can identify which companies are participating by reading the email addresses of others

• Special permission to share company-level data and respondent information with anyone (including same-state agencies) must be obtained
  – EIA’s Data Confidentiality Officer
  – File a formal request to share company-level data with other agencies
For More Information: Data Publications

U.S. Energy Information Administration home page [www.eia.gov](http://www.eia.gov)

This Week in Petroleum (TWIP) [http://www.eia.gov/oog/info/twip/twip.asp](http://www.eia.gov/oog/info/twip/twip.asp)

Heating Oil and Propane Update (HOPU) [http://www.eia.gov/petroleum/heatingoilpropane/](http://www.eia.gov/petroleum/heatingoilpropane/)

Short-Term Energy Outlook (STEO) [http://www.eia.gov/forecasts/steo/](http://www.eia.gov/forecasts/steo/)

Weekly Petroleum Status Report (WPSR)
SHOPP’s EIA-877 Winter Heating Fuels Telephone Survey Contact Information

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