



# CHICAGOSPEAKS PILOT 2024

## NORC



## PROJECT METHODS AND TRANSPARENCY REPORT

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## STUDY INTRODUCTION

The Bridge, EJS (Economics, Justice, and Society), and AmeriSpeak departments at NORC collaborated to conduct the ChicagoSpeaks pilot using three sample sources: (1) NORC's AmeriSpeak® Panelists who reside in Chicago, (2) pre-screened respondents from a previous NORC survey of Chicagoans who agreed to be recontacted, and (3) Chicago residents from Dynata's web panel. AmeriSpeak® is a probability-based panel, the pre-screened respondents were from an ABS probability-based survey, and Dynata is a non-probability panel. The final survey estimates were calibrated to account for these different sample sources. This research was done to support the initial stages of developing a scientifically rigorous, community-driven research resource for informing policymakers and the public with accurate information about the experiences and opinions of all Chicago residents. In addition to the survey topics of importance to Chicagoans, the prescreened respondents were asked if they would like to join a new research panel of Chicago residents called ChicagoSpeaks.

The survey was offered in English and Spanish and was self-administered by the respondent online via the Web. Final data was weighted using NORC's *TrueNorth* Calibration methodology.



### **AAPOR Transparency Initiative**

This *AmeriSpeak Project Methods and Transparency Report* provides complete information on how the survey was executed, including any information disclosure to meet the requirement of the AAPOR Transparency Initiative. NORC at the University of Chicago is a Charter Member of the AAPOR Transparency Initiative, which fosters open science of survey research by acknowledging those organizations that pledge to practice transparency in their reporting of survey-based research findings. More on the Transparency Initiative can be found here: <https://www.aapor.org/Standards-Ethics/Transparency-Initiative/FAQs.aspx>

### **NORC Card**

This *AmeriSpeak Project Methods and Transparency Report* combines into one document two previous deliverables: The NORC Card and The Project Report. AmeriSpeak designed the NORC Card to meet the requirements of the AAPOR Transparency Initiative. The Project Report addressed steps taken to build the AmeriSpeak Panel and conduct the study. Thus, the information in the NORC Card and the Project Report is now fully provided in this *AmeriSpeak Project Methods and Transparency Report*. We at NORC are proud of our rigorous scientific research methodology, and we are deeply committed to transparency in the work we do and the insights we deliver. If there is any information in your *AmeriSpeak Project Methods and Transparency Report* that needs further clarification, please reach out to us so we can provide you with the answers you need.

## SURVEY OVERVIEW

**Study Target Population:** Chicago Residents Age 18+  
**Sample Units (Probability cases only):** 2,093  
**Overall Completed Units:** 1,254  
    **Probability Completed Units:** 855  
    **Nonprobability Completed Units:** 399  
**Expected Eligibility Rate:** 100%  
**Observed Eligibility Rate:** 100%  
**Survey Field Period:** June 24, 2024 - July 10, 2024  
**Median Duration (minutes):** 11

### Definitions of the above categories:

**Study Target Population:** The total set of individuals of interest to which the researcher intends to generalize their conclusions.

**Sample Units:** The number of panel members selected into the study sample.

**Completed Units:** The number of sample units that completed the interview based on the study-specific definition of what constitutes a complete interview. This number excludes any cases where an interviewer finished a survey, but the case was removed due to data quality concerns (the process for such removal is detailed later in this report).

**Expected Eligibility Rate:** The percentage of the sampling population who are expected to meet study eligibility criteria.

**Observed Eligibility Rate:** The percentage of the sample members who were eligible for the study among those who answered the screening questions.

**Survey Field Length:** the period from the earliest to the latest contact dates of cases sampled for the survey.

**Duration:** Length of time for completed interviews. Interview length is calculated differently depending upon whether the interview was conducted over the phone or via the web. For telephone mode, it is the time from when the respondent picks up the telephone until they hang up the telephone. For web interviews, it is the time from when they first connect to the web system to the time they log off the system or become inactive. In the case of multiple contacts, this number represents the sum of those contacts.

## STUDY-SPECIFIC DETAILS

### Sampling

All available city of Chicago, IL residents, within city boundaries, were selected from NORC's probability based AmeriSpeak Panel and from Dynata's non-probability panel for this study.

In 2024, NORC completed another survey called the Chicago PD Consent Decree Survey for the University of Illinois at Chicago (UIC), which utilized an address-based sample of Chicago, IL residents. At the end of this survey, respondents were asked if they would like to participate in more surveys related to Chicago. All respondents who consented to being contacted for additional surveys were sampled into the current study, so long as their address did not change to outside of the city of Chicago, IL city limits (e.g., removed sample that moved out of Chicago city limits). This address-based sample of Chicago Residents will be referred to as the ABS sample in this report.

The overall study target population is adult residents of the city of Chicago, IL.

For more detailed information on the AmeriSpeak panel recruitment and management methodology, please see the Appendix ("Technical Overview of the AmeriSpeak® Panel NORC'S Probability-Based Household Panel") attached to this AmeriSpeak Project Report.

For the non-probability sample, we defined quota buckets for demographic strata to reflect known population distributions and worked with the sample provider to slowly release sample over the field period to adequately fill each. The quota buckets and the number of interviews in each are given later in the field section of this report.

**Field**

A sub-sample of AmeriSpeak web-mode panelists were invited to the survey on June 24 in a soft-launch. The initial data from the soft-launch was reviewed to confirm that there were no processing or programming errors. Once reviewed, the remainder of sampled AmeriSpeak panelists were invited to the survey on June 25, 2024. Sample from Dynata were fielded on July 2 to July 10. The ABS sample was fielded on June 27 to July 10. Data collection ended on July 10.

In total, NORC collected 380 final AmeriSpeak interviews. 399 final AmeriSpeak interviews were collected through Dynata. 475 final interviews were collected through the ABS sample. This does not include interviews that may have been removed for data quality purposes (see below).

**Quota Cells and Number of Completes for Nonprobability Sample by Race/Ethnicity, Age, Education, and Gender (Unweighted)**

Demographic	# of Completes
<b>Chicago Region</b>	
North Central	100
Northwest	71
South	69
Southwest	100
West	59
<b>Age</b>	
18-34	175
35-49	94
50-64	64
65+	66
<b>Gender</b>	
Male	223
Female	176
<b>Race/ethnicity</b>	
Non Hispanic White	133
Non Hispanic Black	126
Hispanic	109
All Other	31
<b>Education</b>	
Less than High School	13
High School Grad	107
Some College	110
Bachelor's or Above	169

### Panel & Survey Sample Performance

The rates reported in the tables below **only** apply to the AmeriSpeak part of the sample. It is not possible to measure most sample performance rates for the nonprobability sample, since we do not know how many were invited to the survey or the necessary information about how the panel was built. It is also not relevant, since there is no advantage of a high response rate when neither the panel nor the sample is based on probability. That said, AAPOR transparency requirements require a participation rate for non-probability respondents (i.e., the number of eligible non-probability respondents completing a survey over the number of the number eligible non-probability respondents starting a survey). For this survey the non-probability participation rate is 94.9%. This rate excludes data quality removals, which are explained in a later section of this report.

To meet requirements in the AAPOR Transparency Initiative, we offer performance outcome measures of both the AmeriSpeak Panel and the AmeriSpeak sample selected from the AmeriSpeak Panel. The AmeriSpeak Panel is a household panel, so recruitment and retention rates are household rates. The survey sample is an individual-level sample pulled from the AmeriSpeak panel, so those are individual-level rates.

Panel Outcome Measures	
Weighted Household Panel Recruitment Rate (WPRrecr)	Weighted Household Panel Retention Rate (WPRet)
21.6%	78.7%

**Weighted Household Recruitment Rate (WPRrecr):** The weighted AAPOR RR3<sup>1</sup> at the household level for AmeriSpeak panel recruitment. A recruited household is a household where at least one adult successfully completed the recruitment survey and joined the panel.

**Weighted Household Retention Rate (WPRet):** The weighted percent of recruited households that remain on the panel and are available for sampling for this survey. Unavailable panelists are those who have temporarily or permanently asked to be removed from the panel or from receiving surveys.

Survey Sample Outcome Measures	
Survey Completion Rate (SurC)	Weighted Cumulative Response Rate (WCR)
40.9%	6.9%

**Survey Completion Rate (SurC):** The percent of sample members who completed the survey interview. 2,093 panelists were invited to the survey, and 855 completed the survey. As noted earlier, survey completes exclude any cases removed due to data quality concerns.

**Weighted Cumulative Response Rate (WCR):** The overall survey response rate that accounts for survey response in all phases, including panel recruitment, panel retention, and survey completion. This overall rate is weighted to account for the sample design and differential inclusion probabilities of sample members in all sampling stages. ( $WCR = SurC \times WPRet \times WPRrecr$ )

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<sup>1</sup>AAPOR RR3 and other response rate calculations can be found here: <https://www.aapor.org/Education-Resources/For-Researchers/Poll-Survey-FAQ/Response-Rates-An-Overview.aspx>.

### Gaining Cooperation of AmeriSpeak Panelists for the Study

If invited, AmeriSpeak panelists can take the survey online through the password-protected AmeriSpeak Mobile App, the password-protected AmeriSpeak Web portal, or by following a link in the e-mail invitation sent to them.

To encourage study cooperation, NORC sent the initial invitation and email reminders to sampled AmeriSpeak web-mode panelists on the following dates:

- Monday, June 24 (soft launch)
- Tuesday, June 25 (main launch)
- Friday, June 28 (reminder)
- Monday, July 1 (reminder)
- Friday, July 5 (reminder)
- Tuesday July 9 (reminder)

SMS or text messages were sent to those invited AmeriSpeak panelists who have agreed to receive such messages on the following days:

- Wednesday, July 3
- Sunday, July 7

AmeriSpeak Panelists were offered the cash equivalent of \$5 for completing this survey.

### Gaining Cooperation of nonprobability sample for the Study

The incentive provided to nonprobability sample is unknown to us. The method for getting completes does not necessarily involve reminders. Since probability is not involved, a higher response rate is not relevant for non-probability sample.

### Gaining Cooperation of ABS sample for the Study

To encourage study cooperation for ABS sample, NORC sent custom initial invitation and reminders with ChicagoSpeaks branding on the following dates:

- Thursday, June 27 (email invitation)
- Thursday, June 27 (USPS letter mail invitation)
- Saturday, June 29 (email reminder)
- Tuesday, July 2 (email reminder)
- Tuesday, July 2 (USPS postcard reminder)
- Monday, July 8 (email reminder)

ABS sample was offered the cash equivalent of \$10 for completing the survey.

After substantive survey questions, ABS sample, who reported having internet access, were invited to be part of a new panel called ChicagoSpeaks. The following provides the exact wording (English version) of how ABS sample were invited:

*Thank you for your opinions and responses so far. As mentioned before, NORC at the University of Chicago is creating a new panel for Chicago residents so Chicagoans can contribute to the decision-making process of policies to be implemented in Chicago. We would like to invite you to be a part of this new panel named ChicagoSpeaks.*

- *As a member, you will be periodically invited to complete online surveys on topics such as health care, education, and politics. Each survey usually takes about 10-15 minutes. When you complete surveys, you can choose between an eGift Card or a physical MasterCard, usually at the amount of \$5.*

- Your participation in ChicagoSpeaks is voluntary. You can choose which surveys to complete, and you may skip any questions you don't wish to answer. You may withdraw your participation in ChicagoSpeaks at any time.
- We take all possible steps to protect your privacy and will use your answers only for statistical research. Your responses will be kept strictly confidential. We will never share your personally identifiable information to clients without your permission. We will not sell your contact information or use it to sell things or services to you.
- If you have any questions about ChicagoSpeaks, you can contact the project team at [support@ChicagoSpeaks.org](mailto:support@ChicagoSpeaks.org) (or [ayuda@ChicagoSpeaks.org](mailto:ayuda@ChicagoSpeaks.org)). If you have any questions or concerns about your rights as a research participant, you can contact NORC Institutional Review Board at (866) 309-0542.

Would you like to join ChicagoSpeaks and be a part of decision-making in Chicago?

- Yes, I would like to join ChicagoSpeaks
- No, I do not want to join ChicagoSpeaks

### Data Processing & Data Quality Review

NORC prepared a fully labeled data file of respondent survey data and demographic data.

NORC applied cleaning rules to the survey data for quality control. In total, 17 cases were removed from the final set of completed interviews based on two cleaning rules. Descriptions of the cleaning criteria and the counts from each are below (counts are overlapping).

- Removing Speeders (i.e., those that completed the survey in less than one-third the median duration)
  - 14 removed for speeding
- Removing Respondents with High Refusal Rates (i.e., those that skip or refused more than 50% of the eligible questions)
  - 3 removed for high refusal rates

Of those 17 cases removed:

- 17 cases were marked with one of the two flags above
- 0 cases were marked with both of the flags above

AmeriSpeak is a probability-based panel, where respondents must be chosen by us to join, where access to surveys is controlled by the panelist secure log-in information to a web portal or app. E-mails, text invitations, or interview-operated telephone calls go directly to the address/number of the recruited panelist. When being called by phone, the panelist is requested by name. The way AmeriSpeak surveys are programmed and panelists are invited, panelists cannot take the survey more than once, and each panelist is always identifiable based on a unique ID. For these reasons, AmeriSpeak does not suffer the problem of “bots,” fabricated profiles, non-invited respondents, or individuals or members of the household repeatedly and illegitimately taking the same survey.

However, since this is a TrueNorth project, part of the sample for this survey is a non-probability source where bots, fabricated profiles, non-invited respondents, or repeat survey takers can be an issue. So, in addition to the data quality check above (the numbers above include probability and non-probability cases), we have additional data quality steps with the non-probability cases. At the beginning of the survey for non-probability cases, when we collect demographic measures, we include two “attention checks.” One is a question with a list of random numbers for response options, and the question asks the respondent to pick a specific number. In addition, we ask both age and birth year in the section with demographic questions (these two questions are not asked in a sequential order). If a respondent fails to select the number we make clear they should be selecting or if the respondent gives an age and birth year that cannot both be true, we end the survey for that respondent. Finally, we include a programmed tool called **Relevant ID** (<https://www.imperium.com/relevantid/>), which flags and blocks suspicious non-



probability respondents based on duplicate IP addresses, geo-location, and other suspicious factors. The number of non-probability cases blocked from the survey by these means are:

- 9 of cases that were flagged as suspicious and blocked from taking the survey by Relevant ID
- 20 cases where the respondent failed at least one of the two attention check questions and was blocked from taking the survey

### Statistical Weighting & TrueNorth Calibration



The final weights that are delivered with the data are developed through three stages. First, probability and nonprobability sample weights are developed separately. Second, small area estimation is leveraged to model core response variables and generate raking benchmarks. Finally, the two samples are combined through TrueNorth calibration to create the final weights. These final two stages make up NORC's TrueNorth® Calibration.<sup>2</sup>

#### Stage 1: Core Probability and Nonprobability Weights

There are six unique steps to the development of core probability weights and two for core nonprobability weights. The six core probability weight steps are as follows:

**AmeriSpeak Panel Weight:** Since the sampling frame for the probability sample is the AmeriSpeak Panel, which itself is a sample, the starting point of the weighting process for the study is the AmeriSpeak panel weight<sup>3</sup>. The panel weight reflects the cumulative panel recruitment selection probabilities, nonresponse adjustments, and calibration to population benchmarks, both at the household and individual levels.

**ABS Base Weight:** Final study weights from the Chicago PD Consent Decree for UIC were used as the starting point for the ABS sample. To calculate the base weight for the cases invited to this survey, the sum of the final study weights for all UIC survey completes was divided by the sum of the final study weights for UIC survey completes who consented to being contacted to take more surveys relating to Chicago and still reside in Chicago, within weight adjustment classes defined by age, race/ethnicity, gender, and education.

**AmeriSpeak Base Weight:** The AmeriSpeak Panel Weight is then adjusted to account for the sample selection probability from the panel under the study sample design. The base weight for the study sample is a product of the AmeriSpeak Panel Weight and the inverse of selection probabilities associated with sample selection from the panel. To ensure the AmeriSpeak base weight was representative of Chicago residents, the AmeriSpeak base weight was raked to Chicago population benchmarks.

**Combined Probability Base Weight:** The ABS and AmeriSpeak Base Weights were then combined by a composition factor proportional to the number of invited cases from each group within five Chicago regions (North Central, Northwest, West, Southwest, and South).

**Nonresponse Adjusted Probability Weight:** The nonresponse adjusted weight is created by adjusting the combined probability base weights for respondents to compensate for nonrespondents within nonresponse weighting classes defined by age, race/ethnicity, gender, and education. Within each weighting class, the nonresponse adjusted weight is the product of the base weight and the inverse of the weighted response rate.

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<sup>2</sup> More on TrueNorth Calibration can also be found here: <https://amerispeak.norc.org/us/en/amerispeak/our-capabilities/truenorth.html>.

<sup>3</sup> The AmeriSpeak panel weight existed prior to this study; the weighting procedures are described here for clarity and completeness.



**Probability Weight** is the nonresponse adjusted weight calibrated to population benchmarks through raking ratio adjustments. For the nonprobability sample cases, the raking adjustments are applied to their base weights. The raking variables are detailed after the description of the core nonprobability weight.

The nonprobability sample weights are developed in the following stages:

**Nonprobability Base Weight:** There are no known probabilities of selection for nonprobability sample cases.

**Nonprobability Weight:** The base weight is then raked to the same population benchmarks as those used for raking the AmeriSpeak base weight and the probability sample.

**Probability and Nonprobability Raking Benchmarks** The benchmarks used for raking the AmeriSpeak base weight and both the probability and nonprobability samples are:

**Age:** North Central Chicago and Age 18-24, North Central Chicago and Age 25-29, North Central Chicago and Age 30-39, North Central Chicago and Age 40-49, North Central Chicago and Age 50-59, North Central Chicago and Age 60-64, North Central Chicago and Age 65+, Northwest Chicago and Age 18-24, Northwest Chicago and Age 25-29, Northwest Chicago and Age 30-39, Northwest Chicago and Age 40-49, Northwest Chicago and Age 50-59, Northwest Chicago and Age 60-64, Northwest Chicago and Age 65+, South Chicago and Age 18-24, South Chicago and Age 25-29, South Chicago and Age 30-39, South Chicago and Age 40-49, South Chicago and Age 50-59, South Chicago and Age 60-64, South Chicago and Age 65+, Southwest Chicago and Age 18-24, Southwest Chicago and Age 25-29, Southwest Chicago and Age 30-39, Southwest Chicago and Age 40-49, Southwest Chicago and Age 50-59, Southwest Chicago and Age 60-64, Southwest Chicago and Age 65+, West Chicago and Age 18-24, West Chicago and Age 25-29, West Chicago and Age 30-39, West Chicago and Age 40-49, West Chicago and Age 50-59, West Chicago and Age 60-64, West Chicago and Age 65+

**Gender:** North Central Chicago and Male, North Central Chicago and Female, Northwest Chicago and Male, Northwest Chicago and Female, South Chicago and Male, South Chicago and Female, Southwest Chicago and Male, Southwest Chicago and Female, West Chicago and Male, West Chicago and Female

**Race/Ethnicity:** North Central Chicago and Non-Hispanic White, North Central Chicago and Non-Hispanic Black, North Central Chicago and Hispanic, North Central Chicago and Non-Hispanic Other, Northwest Chicago and Non-Hispanic White, Northwest Chicago and Non-Hispanic Black, Northwest Chicago and Hispanic, Northwest Chicago and Non-Hispanic Other, South Chicago and Non-Hispanic White, South Chicago and Non-Hispanic Black, South Chicago and Hispanic, South Chicago and Non-Hispanic Other, Southwest Chicago and Non-Hispanic White, Southwest Chicago and Non-Hispanic Black, Southwest Chicago and Hispanic, Southwest Chicago and Non-Hispanic Other, West Chicago and Non-Hispanic White, West Chicago and Non-Hispanic Black, West Chicago and Hispanic, West Chicago and Non-Hispanic Other

**Education:** North Central Chicago and Less than High School, North Central Chicago and High School/GED, North Central Chicago and Some College, North Central Chicago and BA and Above, Northwest Chicago and Less than High School, Northwest Chicago and High School/GED, Northwest Chicago and Some College, Northwest Chicago and BA and Above, South Chicago and Less than High School, South Chicago and High School/GED, South Chicago and Some College, South Chicago and BA and Above, Southwest Chicago and Less than High School, Southwest Chicago and High School/GED, Southwest Chicago and Some College, Southwest Chicago and BA and Above, West Chicago and Less than High School, West Chicago and High School/GED, West Chicago and Some College, West Chicago and BA and Above

**Age x Gender:** North Central Chicago and 18-34 Male, North Central Chicago and 18-34 Female, North Central Chicago and 35-49 Male, North Central Chicago and 35-49 Female, North Central Chicago and 50-64 Male, North Central Chicago and 50-64 Female, North Central Chicago and 65+ Male, North Central Chicago and 65+ Female, Northwest Chicago and 18-34 Male, Northwest Chicago and 18-34 Female, Northwest Chicago and 35-49 Male, Northwest Chicago and 35-49 Female, Northwest Chicago and 50-64 Male, Northwest Chicago and 50-64 Female, Northwest Chicago and 65+ Male, Northwest Chicago and 65+ Female, South Chicago and 18-34 Male, South Chicago and 18-34 Female, South Chicago and 35-49 Male, South Chicago and 35-49 Female, South Chicago and 50-64 Male, South Chicago and 50-64 Female, South Chicago and 65+ Male, South Chicago and 65+ Female, Southwest Chicago and 18-34 Male, Southwest Chicago and 18-34 Female, Southwest Chicago and 35-49 Male, Southwest Chicago and 35-49 Female, Southwest Chicago and 50-64 Male, Southwest Chicago and 50-64 Female, Southwest Chicago and 65+ Male, Southwest Chicago and 65+ Female, West Chicago and 18-34 Male, West Chicago and 18-34 Female, West Chicago and 35-49 Male, West Chicago and 35-49 Female, West Chicago and 50-64 Male, West Chicago and 50-64 Female, West Chicago and 65+ Male, West Chicago and 65+ Female

**Age x Race/Ethnicity:** North Central Chicago and 18-34 Non-Hispanic White, North Central Chicago and 18-34 All Other, North Central Chicago and 35-49 Non-Hispanic White, North Central Chicago and 35-49 All Other, North Central Chicago and 50-64 Non-Hispanic White, North Central Chicago and 50-64 All Other, North Central Chicago and 65+ Non-Hispanic White, North Central Chicago and 65+ All Other, Northwest Chicago and 18-34 Non-Hispanic White, Northwest Chicago and 18-34 All Other, Northwest Chicago and 35-49 Non-Hispanic White, Northwest Chicago and 35-49 All Other, Northwest Chicago and 50-64 Non-Hispanic White, Northwest Chicago and 50-64 All Other, Northwest Chicago and 65+ Non-Hispanic White, Northwest Chicago and 65+ All Other, South Chicago and 18-34 Non-Hispanic White, South Chicago and 18-34 All Other, South Chicago and 35-49 Non-Hispanic White, South Chicago and 35-49 All Other, South Chicago and 50-64 Non-Hispanic White, South Chicago and 50-64 All Other, South Chicago and 65+ Non-Hispanic White, South Chicago and 65+ All Other, Southwest Chicago and 18-34 Non-Hispanic White, Southwest Chicago and 18-34 All Other, Southwest Chicago and 35-49 Non-Hispanic White, Southwest Chicago and 35-49 All Other, Southwest Chicago and 50-64 Non-Hispanic White, Southwest Chicago and 50-64 All Other, Southwest Chicago and 65+ Non-Hispanic White, Southwest Chicago and 65+ All Other, West Chicago and 18-34 Non-Hispanic White, West Chicago and 18-34 All Other, West Chicago and 35-49 Non-Hispanic White, West Chicago and 35-49 All Other, West Chicago and 50-64 Non-Hispanic White, West Chicago and 50-64 All Other, West Chicago and 65+ Non-Hispanic White, West Chicago and 65+ All Other

**Race/Ethnicity x Gender:** North Central Chicago and Non-Hispanic White Male, North Central Chicago and Non-Hispanic White Female, North Central Chicago and All Other Male, North Central Chicago and All Other Female, Northwest Chicago and Non-Hispanic White Male, Northwest Chicago and Non-Hispanic White Female, Northwest Chicago and All Other Male, Northwest Chicago and All Other Female, South Chicago and Non-Hispanic White Male, South Chicago and Non-Hispanic White Female, South Chicago and All Other Male, South Chicago and All Other Female, Southwest Chicago and Non-Hispanic White Male, Southwest Chicago and Non-Hispanic White Female, Southwest Chicago and All Other Male, Southwest Chicago and All Other Female, West Chicago and Non-Hispanic White Male, West Chicago and Non-Hispanic White Female, West Chicago and All Other Male, West Chicago and All Other Female

These sociodemographic characteristics are weighted to benchmarks from the ACS 2022 1-year estimate

## Stage 2: TrueNorth Small Area Modelling Calibration

At the core of the TrueNorth calibration method is a small area modeling<sup>4</sup> procedure conducted in the following steps:

- First, we identify a set of three key response variables from the survey using a machine-learning approach called gradient-boosted tree modelling. This method is used to identify the key response variables that are associated with the largest bias in the nonprobability sample and are also highly correlated with other response variables.
- Second, we define a set of domains in the data, where each domain is a specific, relevant subgroup for data analysis and reporting. The domains used for this study are Chicago Region (5), Race/Ethnicity (2), Age (3), and Education (2). Overall, then, this study used 60 unique domains.
- Third, we fit domain-level small area models for each of the response variables identified earlier using the weighted probability sample and nonprobability sample domain-level estimates as input. These estimates are weighted estimates where the weights are the final probability and nonprobability weights, respectively. The model included covariates, domain-level random effects, and sampling errors. The covariates were external data available from the American Community Survey (ACS).
- Fourth, the fitted small area models provide predicted totals for each domain and for each response variable category, which are then used as raking benchmarks in the final weighting step described below.

## Stage 3: Final Combined Study Weight

The final combined probability and nonprobability sample weights were derived by raking samples together, using the same benchmarks for age, gender, Chicago region, race/ethnicity, education, age x gender, age x race/ethnicity and race/ethnicity x gender noted earlier, plus the predicted totals for each domain for each response variable modeled in the small area modeling process.

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<sup>4</sup> Rao J, Molina I. Small Area Estimation. 2nd ed. Hoboken, NJ: Wiley; 2015. doi:10.1002/9781118735855

## Benchmark Comparisons

The following table shows the weighted and unweighted estimates for key demographics and compares them to population benchmarks.<sup>5</sup>

Demographic Category	Subcategory	Unweighted (%)	Weighted (%)	Benchmark (%)
<b>Age</b>	18 - 24	16.3	12.0	11.5
	25 - 29	10.9	12.7	12.3
	30 - 39	21.1	21.1	21.4
	40 - 49	22.0	17.0	16.2
	50 - 59	12.9	14.8	14.3
	60 - 64	5.5	6.2	6.5
	65 Plus	11.2	16.2	17.8
<b>Sex</b>	Male	44.3	48.2	47.9
	Female	55.7	51.8	52.1
<b>Education Status</b>	Less than High School	4.5	9.6	12.7
	High School Equivalent	19.3	23.6	21.4
	Some College/Associate Degree	27.0	24.1	23.6
	Bachelor's or Higher	49.1	42.7	42.3
<b>Race/Ethnicity</b>	Non-Hispanic White	34.7	34.4	34.6
	Non-Hispanic Black	32.8	27.0	26.4
	Hispanic	23.6	27.5	28.2
	All other	8.9	11.1	10.8
<b>Chicago Region</b>	North Central Chicago	22.8	26.6	26.7
	Northwest Chicago	15.5	16.5	16.5
	South Chicago	21.6	19.2	19.3
	Southwest Chicago	23.1	20.5	20.5
	West Chicago	17.0	17.2	17.1

As a part of the AAPOR Transparency Initiative, it is incumbent on us to state that there are no perfect studies, and all research and methods have their limitations. The purpose of this document is to make apparent, for this study, some possible limitations, the steps taken to minimize them, and the potential or known sources of measurable or estimated error whenever possible. However, there is always going to be some unmeasured and unknowable error with all forms of public opinion research, including ours.

### Design Effect and Sampling Margin of Error Calculations

Study design effect: 2.19

Study margin of error: +/-4.41%

Under TrueNorth calibration, combined probability and nonprobability sample weights yield approximately unbiased population estimates. The margins of error reported here reflect the sampling variation of the probability sample as well as the TrueNorth model-assisted calibration procedures that generate the combined sample weights. As such, it is reasonable for analysts using this data to employ standard

<sup>5</sup> Because we trim the weights to remove extreme weights and hold down weight variation, the final study weights may end up deviating from exact populations benchmarks by small but acceptable amounts. Even without trimming, there can be a limit in the ability to perfectly match benchmarks along all variables and categories included in the raking procedure. Our goal is to rake as close as possible before trimming.

methods for approximating margins of error and statistical significance, although there is currently no statistically agreed upon approach to variance estimation when utilizing nonprobability samples.

## How to Describe AmeriSpeak and NORC @ the University of Chicago

For purposes of publication, when describing the AmeriSpeak Panel and its methodology, we recommend using the following language:

Funded and operated by NORC at the University of Chicago, **AmeriSpeak®** is a probability-based panel designed to be representative of the US household population. Randomly selected US households are sampled using area probability and address-based sampling, with a known, non-zero probability of selection from the NORC National Sample Frame. These sampled households are then contacted by US mail, telephone, and field interviewers (face to face). The panel provides sample coverage of approximately 97% of the U.S. household population. Those excluded from the sample include people with P.O. Box only addresses, some addresses not listed in the USPS Delivery Sequence File, and some newly constructed dwellings. While most AmeriSpeak households participate in surveys by web, non-internet households can participate in AmeriSpeak surveys by telephone. Households without conventional internet access but having web access via smartphones are allowed to participate in AmeriSpeak surveys by web. AmeriSpeak panelists participate in NORC studies or studies conducted by NORC on behalf of governmental agencies, academic researchers, and media and commercial organizations.

For more information, email [AmeriSpeak-BD@norc.org](mailto:AmeriSpeak-BD@norc.org) or visit [AmeriSpeak.norc.org](http://AmeriSpeak.norc.org).

If editors or reviewers are requesting anything more specific or any other detail, please reach out to us to make certain you are using accurate language.

For a less technical, panel-specific description of **AmeriSpeak**, we recommend:

**AmeriSpeak** is the first U.S. multi-client household panel to combine the speed and cost-effectiveness of panel surveys with enhanced representativeness of the U.S. population, an industry-leading response rate, and an innovative and thorough Project Methods and Transparency Report. Since its founding by NORC at the University of Chicago in 2015, AmeriSpeak has produced more than 1000 surveys, been cited by dozens of media outlets, and become the primary survey partner of the nation's preeminent news service, The Associated Press. AmeriSpeak is the most scientifically rigorous multi-client panel available in the U.S. market. [Amerispeak.norc.org](http://Amerispeak.norc.org).

**NORC at the University of Chicago** is best described as follows:

NORC at the University of Chicago conducts research and analysis that decision-makers trust. As a nonpartisan research organization and a pioneer in measuring and understanding the world, NORC has studied almost every aspect of the human experience and every major news event for more than eight decades. Today, NORC partners with government, corporate, and nonprofit clients around the world to provide the objectivity and expertise necessary to inform the critical decisions facing society. [www.norc.org](http://www.norc.org)

Please refer to the full name "NORC at the University of Chicago" when first mentioning us. Using simply "NORC," thereafter, is fine. Our name is now only the acronym and does not need to be spelled out.

## APPENDIX

# TECHNICAL OVERVIEW OF THE AMERISPEAK® PANEL NORC'S PROBABILITY-BASED HOUSEHOLD PANEL

Updated February 8, 2022

This technical overview provides the basic information about AmeriSpeak®, a large probability-based panel funded and operated by NORC at the University of Chicago. AmeriSpeak is designed to be representative of the U.S. household population, including all 50 states and the District of Columbia. U.S. households are randomly selected with a known, non-zero probability from the NORC National Frame as well as address-based sample (ABS) frames, and then recruited by mail, telephone, and by field interviewers face to face. AmeriSpeak panelists participate in NORC studies or studies conducted by NORC on behalf of governmental agencies, academic institutions, the media, and commercial organizations.

The construction of the AmeriSpeak panel started in 2014 with pilot samples. In 2015, about 7,000 households were recruited from a sample of around 60,000 addresses. In 2016, about 128,000 addresses were sampled to expand the panel to around 20,000 recruited households. About 51,000 addresses were selected for the 2017 recruitment, which led to the expansion of the regular AmeriSpeak panel to 23,000 recruited households. The AmeriSpeak Panel expanded to approximately 30,000 households in 2018 and 35,000 households in 2019 through further recruitment efforts. The current panel size is 54,001 panel members aged 13 and over residing in over 43,000 households.

In addition to the regular panel for general population studies, AmeriSpeak also contains sub-panels to support studies of special populations, including AmeriSpeak Latino, AmeriSpeak Teen, and AmeriSpeak Young Adult 18-34 (which features an oversample of African Americans, Hispanics, and Asians). AmeriSpeak is also the probability sample source for TrueNorth®, the NORC calibration solution for combining probability and non-probability samples for estimation through small area modeling that leverages data from AmeriSpeak, the American Community Survey, Current Population Survey, and other data sources for improved statistical efficiency.<sup>6</sup> AmeriSpeak is also the sample source for the Foresight 50+ panel, which is a partnership between AARP and NORC that provides a high-quality panel for organizations looking for insights from older adults living in the United States.<sup>7</sup>

### Panel Sample Frame

The primary sampling frame for AmeriSpeak is the 2010 NORC National Frame, a multistage probability sample that fully represents the U.S. household population. We provide a brief description of how the National Frame was constructed after the 2010 Census.

The primary sampling units (PSUs) in the first stage sample selection are 1,917 National Frame Areas (NFAs), each of which is an entire metropolitan area (made up of one or more counties), a county, or a group of counties with a minimum population of 10,000. A total of 126 NFAs are selected in the first stage, including 38 certainty NFAs, 60 urban NFAs, and 28 non-urban NFAs. The largest 38 NFAs, those with a population of at least 1,543,728 (0.5 percent of the 2010 Census U.S. population), were selected into the National Frame with certainty.

Within the 126 selected NFAs, the secondary sampling units (SSUs) are segments defined from Census tracts or block groups, where each segment contains at least 300 housing units according to the 2010 Census. Within the certainty NFAs, a sample of 896 segments was selected using systematic PPS sampling, where the size of a segment is the number of housing units. Implicit stratification was achieved

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<sup>6</sup> For more information about TrueNorth, see <http://amerispeak.norc.org/our-capabilities/Pages/TrueNorth.aspx>.

<sup>7</sup> For more information about Foresight 50+, see <https://www.norc.org/Research/Capabilities/Pages/Foresight50.aspx>



by sorting the segments by location (NFA, state, and county), principal city indicator, and by ethnic and income indicators. From each urban and rural NFA, a sample of 8 and 5 segments was selected, respectively, using systematic PPS sampling where the measure of size is the number of housing units per segment. A total of 618 segments are selected from the non-certainty NFAs<sup>8</sup>. Overall, a stratified probability sample of 1,514 segments was selected into the National Frame in the second stage sampling.

Within the selected segments, all housing units are listed using the U.S. Postal Service Delivery Sequence File (DSF). In the 123 segments where the DSF coverage is deemed inadequate, the DSF address list is enhanced with an in-person field listing to improve coverage. The final National Frame, consisting of all listed households in the sample segments, is estimated to provide over 97 percent coverage of the U.S. household population. It contains almost 3 million households, including over 80,000 rural households that are added through the in-person listing. In addition to NORC's National Frame, the DSF is used as a supplemental sample frame in four states. Although nationally representative, the National Frame does not include households from Alaska, Iowa, North Dakota, and Wyoming. Since 2016, the annual panel recruitment sample has included a small address-based sample from these four states to assure AmeriSpeak presence in all U.S. States and Washington, D.C.

In 2017, an enhanced DSF frame was also used to develop a new Latino Panel with adequate representation of Spanish-language-dominant Hispanics. Census tracts with a high incidence (at least 30%) of Spanish-dominant Hispanics were targeted for this recruitment. Furthermore, within these Census tracts, households that were flagged as Hispanic based on consumer vendor data (that are typically used for direct-mail marketing) were oversampled.

### Panel Sample Selection

For panel sample selection between 2014 and 2018 and in 2020, National Frame segments were stratified into six sampling strata based on the race/ethnicity and age composition of each segment, as below:

- Hispanic, high youth segments
- Hispanic, not high youth segments
- Non-Hispanic Black, high youth segments
- Non-Hispanic Black, not high youth segments
- Other, high youth segments
- Other, not high youth segments

Hispanic segments are those where Hispanics make up at least a third of the population and the Hispanic share in the population is greater than that of non-Hispanic Black. Similarly, non-Hispanic Black segments are those where non-Hispanic Black make up at least a third of the population and the non-Hispanic Black share in the population is greater than that of Hispanics. Finally, High Youth refers to segments in which 18-24-year-old adults are at least 12% of the total adult population. The above stratification is used to oversample housing units in areas with a higher concentration of young adults, Hispanics, and non-Hispanic African Americans. The resulting household sample is referred to as the initial AmeriSpeak sample or sample for initial panel recruitment.

To support the second stage of panel recruitment, initially sampled but nonresponding housing units are subsampled for a nonresponse follow-up (NRFU)<sup>9</sup>. At this stage, consumer vendor data are matched to

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<sup>8</sup> A sample of 5 segments was selected from each of the 28 non-urban NFAs. However, 2 sample segments were later subsampled out in Montana due to cost.

<sup>9</sup> A small fraction of initially nonresponding housing units is not eligible for NRFU, including "hard refusals" and those with an appointment for a call back from NORC.



the pending housing units, and housing units that are flagged as having a young adult<sup>10</sup> (18-34 years of age) or minority (Hispanic<sup>11</sup>, non-Hispanic Black<sup>12</sup>) are oversampled for the NRFU sample. Overall, approximately one in five initially nonresponding housing units are subsampled for NRFU using the same six sampling strata defined above. Due to NRFU, these initially nonresponding housing units have a higher selection probability compared to the housing units that were recruited during the first stage of panel recruitment.

A two-phase state-based ABS sample design was used for the 2019 AmeriSpeak recruitment. NORC's National Frame is designed to represent the U.S. household population nationally. At the state level, however, the panel may have more significant clustering effects from the use of the National Frame, especially for states with a small population. The primary objective of the 2019 design is to improve state-level representation by selecting the recruitment sample mostly from areas that are outside the National Frame. A stratified systematic sample was selected in the first phase, where each state constitutes a sampling stratum, and the sample was allocated to the strata proportional to the square root of the state population. In the second phase, young adults, Hispanic, non-Hispanic Black, and conservatives are oversampled based on commercial data sources to improve their representation in the panel. Because the 2019 design did not use NRFU face-to-face recruitment, the 2019 design did not involve geographic clustering.

In 2020 we returned to the "standard" sampling strategy employed in 2014 through 2018, with intentions to conduct a robust NRFU. However, the COVID-19 pandemic prevented NORC from utilizing field interviewers and the NRFU was limited to its usual first stage, a Federal Express mailing to 20% of the total sample. After an analysis of state-level representativity after 2019 recruitment, it was determined that further statewide representativity was needed in four states: WI, MO, WA, and CO. As such, statewide samples using the USPS DSF file were generated for supplemental recruitment.

In 2021, NORC also recruited into an AmeriSpeak probability sample of persons aged 50 and older using a random national consumer address file (estimated 96% sample coverage of all households in the U.S.). AmeriSpeak re-empaneled approximately 6,000 study participants in this initiative.

It was clear at the start of 2021 that NORC would not immediately be able to conduct in-person interviewing given the ongoing COVID-19 pandemic. However, NORC sought to test new sampling strategies (noted below) early in 2021 in the hopes of documenting their efficacy and continuing and improving on them for the rest of 2021. Additionally, it was hoped that NORC would be able to conduct in-person interviewing in the second half of 2021. As such, the 2021 recruiting sample was split into five replicates, the first of which utilized DSF sample, and was released early in the calendar year, while future replicates were sampled using the NORC National Frame and were held until mid-year for recruiting.

At the end of 2020, a major assessment of panel representativeness was conducted to inform the 2021 sampling strategy. This analysis again explored representativity by state, but as well explored a full range of demographic variables. This analysis was conducted both with the full panelist dataset as well as by assessing "effective panelists," a measure of the likely demographic distributions that would occur among complete cases in any typical AmeriSpeak survey. This analysis found that AmeriSpeak could benefit from additional panelists in seven groups: households earning over \$200,000, household with children, Hispanics, Hispanics that specifically speak Spanish, African Americans, persons ages 18 to 24, and persons with less than a High School education. As such, the sample was stratified using NORC Big Data Classifiers (Dutwin et al, 2022), a technique utilizing available consumer and other public Big Data to

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<sup>10</sup> A young adult flagged household refers to a household where MSG or TargetSmart indicated there was an 18-24-year-old adult in the household. In 2016 and 2017, a slightly different definition was used, and a young adult flagged household was defined as having an 18-34-year-old adult in the household by MSG or 18-30-year-old adult by TargetSmart.

<sup>11</sup> A Hispanic flagged household refers to a household where MSG or TargetSmart indicated the presence of a Hispanic adult in the household.

<sup>12</sup> A non-Hispanic Black-flagged household refers to a household where MSG or TargetSmart indicated the presence of a non-Hispanic Black adult in the household.

make predictions on a range of household attributes during survey sampling. Households predicted to be one of these seven attributes were oversampled, while households predicted only hold persons aged 50 and older, or otherwise not predicted hold someone with one of the seven attributes, were under sampled. This sampling method was tested in the first sampling replicate, and given very positive results, was continued in all other 2021 replicates.

NORC's strategy of "waiting it out" was effective, as the sample replicates released mid-year allowed NORC, to wait for an effective "COVID window" to conduct in-person interviewing. In short, in-person interviewing commenced after the peak of the Delta variant in 2021 and concluded with the peak of the Omicron variants. NORC was able to conduct a full NRFU in-person effort during this time.

### **Panel Recruitment Procedures**

AmeriSpeak Panel recruitment is a two-stage process: (i) initial recruitment using USPS mailings, telephone contact, and modest incentives, and (ii) a more elaborate NRFU recruitment using FedEx mailings, enhanced incentives, and in-person visits by NORC field interviewers.

For the initial recruitment, sample households are invited to join AmeriSpeak online by visiting the panel website AmeriSpeak.org or by calling a toll-free telephone line (inbound/outbound supported). Both English and Spanish languages are supported for online and telephone recruitment. The initial recruitment data collection protocol features the following: an over-sized pre-notification postcard, a USPS recruitment package in a 9"x12" envelope (containing a cover letter, a summary of the privacy policy, FAQs, and a study brochure), two follow-up postcards, and contact by NORC's telephone research center for sample units with a matched telephone number.

For the second stage NRFU recruitment, a stratified random sample is selected from the nonrespondents of the initial recruitment. Units sampled for NRFU are sent a new recruitment package by Federal Express with an enhanced incentive offer. Shortly thereafter, NORC field interviewers make personal, face-to-face visits to the pending cases to encourage participation. Once the households are located, the field interviewers administer the recruitment survey in-person using CAPI or else encourage the respondents to register online or by telephone.

### **Panel Recruitment Response Rate and Other Panel Statistics**

A sample household is considered recruited or responded if at least one adult in the household joins the panel. The weighted household response rate (AAPOR RR3) is about 6% for initial recruitment and 28% for NRFU recruitment. We report two recruitment response rates: one for all the panel recruitment years (2014-2021) and one for the recruitment years with NRFU (2014-2018 and 2021). For all recruitment years, the cumulative weighted household response rate is 21.9%; for recruitment years with NRFU, and the cumulative weighted household response rate is 34.0%.<sup>13</sup> For client studies requiring a panel recruitment response rate exceeding 30%, the sampling frame may be restricted to the panelists recruited in the NRFU years. The panel recruitment response rate calculation methodology is consistent with AAPOR guidelines and fully documented.<sup>14</sup> The annual panel retention rate is about 85%.

For individual client surveys based on the AmeriSpeak Panel, the AAPOR RR3 response rate is between 10% to 20% depending on specific study parameters such as target population, survey length, time in the field, salience of subject, and the like. This response rate takes into account panel recruitment rate, panel retention rate, and survey participation rate.<sup>15</sup>

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<sup>13</sup> As the 2021 NRFU is continuing to wind down, response rates noted here are estimated for 2021 sample cases.

<sup>14</sup> See [http://amerispeak.norc.org/research/Pages/WhitePaper\\_ResponseRateCalculation\\_AmeriSpeak\\_2016.pdf](http://amerispeak.norc.org/research/Pages/WhitePaper_ResponseRateCalculation_AmeriSpeak_2016.pdf)

<sup>15</sup> A properly calculated cumulative AAPOR response rate for panel-based research takes into account all sources of non-response at each stage of the panel recruitment, management, and survey administration process (see [https://www.aapor.org/AAPOR\\_Main/media/publications/Standard-Definitions20169theditionfinal.pdf](https://www.aapor.org/AAPOR_Main/media/publications/Standard-Definitions20169theditionfinal.pdf), page 48-9). A common misapplication of the term "response rate" in online panel surveys is to represent the survey-specific cooperation rate as the

Other important panel statistics with respect to the 2014-2019 and 2021 recruited households are as follows: 68% are recruited in the initial stage and 32% are recruited via NRFU; 92% of the active panelists prefer to do web or online surveys, while 8% prefer to participate in telephone surveys; 16% of the recruited households are non-Internet<sup>16</sup>; 82% are cell phone only or cell phone mostly; 17% are African-American and 18% Hispanic; and 29% have household income below \$30,000 (compared to CPS benchmark of 26%).<sup>17</sup>

### Impact of Non-Response Follow-Up

NRFU is instrumental in producing the industry-leading response rate for AmeriSpeak Panel recruitment. Moreover, due to the more intensive effort, NRFU recruitments better represent hard-to-reach groups and are therefore more representative of the target population. For example, initial recruitment tends to under-represent young adults 18-34 years of age. NRFU recruitment corrects for this bias by bringing the age distribution of the panel closer to ACS benchmarks.

Overall, NRFU recruitment significantly improves the representation of the panel with respect to demographic segments that are under-represented among the respondents to the initial recruitment, including young adults (persons 18 to 34 years of age), African Americans, Hispanics, lower-income households, renters, cellphone-only households, and persons with lower educational attainment (e.g., no college degree). To the extent that these demographic characteristics are correlated with substantive survey variables, NRFU helps to reduce potential non-response bias in the sample estimates. NORC's research indicates that NRFU respondents are indeed somewhat different from initial respondents for many common survey variables. For example, compared to the panelists recruited during the initial stage, NRFU panelists tend to be more conservative politically, more likely to attend church, less interested in current events or topics in the news report, less knowledgeable about science, less likely to be in favor of gun control policies, less likely to read a print newspaper (more likely to read the news online and use social media), more likely to eat at fast-food restaurants, and so on<sup>18</sup>. These observations illustrate that NRFU recruitment is critical for achieving a more balanced panel and for making the substantive estimates in AmeriSpeak studies more accurate. Even though NRFU panelists are more reluctant to complete surveys, the addition of NRFU panelists reduced total absolute bias on average 5 to 21 percentage points when compared to the initial stage recruits (among examined surveys).<sup>19</sup>

### Mixed-Mode Data Collection

The AmeriSpeak Panel supports mixed-mode data collection to improve response rate and the representativeness of the complete surveys. During the recruitment survey, AmeriSpeak panelists are offered an opportunity to choose their preferred mode—web or phone—for future participation in AmeriSpeak surveys. A recruited household can consist of both web- and phone-mode panelists. Panelists predominantly prefer web over phone mode. As of February 2020, 92% of the active panelists prefer to do web or online surveys, while 8% prefer to participate in telephone surveys. The telephone mode encompasses panelists without internet access, panelists whose only internet access is via a smartphone, and panelists with internet access but are unwilling to share an email address.

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"cumulative survey response rate." See "Response Rate Calculation Methodology for Recruitment of a Two-Phase Probability-Based Panel: The Case of AmeriSpeak" authored by Robert Montgomery, J. Michael Dennis, N. Ganesh. The paper is available at <https://amerispeak.norc.org/research/>.

<sup>16</sup> The non-internet households (HHs) are those that do not select "High-speed, broadband internet at home (such as cable or DSL)" or "Dial-up internet at home" response options when they are asked "What kind of internet access do you have? Please select all that apply" item in the recruitment survey. The non-internet HHs include those that only use internet on a cell connection or mobile phone.

<sup>17</sup> For transparency purposes, unweighted percentages are presented in this section. Hence, these results do not take into account selection probabilities. The base weighted distributions that take into account selection probabilities can be provided upon request.

<sup>18</sup> See "The Undercounted: Measuring the Impact of 'Nonresponse Follow-up' on Research Data and Outcome Measures" authored by Ipek Bilgen, J. Michael Dennis, N. Ganesh. The paper will be soon available at <https://amerispeak.norc.org/research/>.

<sup>19</sup> See "Nonresponse Follow-up Impact on AmeriSpeak Panel Sample Composition and Representativeness" authored by Ipek Bilgen, J. Michael Dennis, N. Ganesh. The paper is available at <https://amerispeak.norc.org/research/>.

To the extent that non-internet households or “net averse” persons are different from the rest of the population, mixed-mode surveys have better population coverage and produce more accurate population estimates. NORC’s telephone interviewers administer the telephone surveys using a data collection system supporting both the phone and web modes, providing an integrated sample management and data collection platform. For panelists using smartphones for web-mode surveys, the NORC survey system renders an optimized presentation of the survey questions for these mobile users.

### **Panel Management and Maintenance**

Panel management and maintenance are crucial for panel health and efficiency. NORC maintains strict panel management rules to limit respondent burden, reduce panel attrition, and minimize the risk of panel fatigue. On average, AmeriSpeak panelists are invited to participate in client studies two to three times a month. AmeriSpeak works with NORC clients to create surveys that provide an appropriate user experience for AmeriSpeak panelists. AmeriSpeak will not field surveys that in our professional judgment will result in a poor user experience for our panelists. AmeriSpeak also has a designated website and a telephone number for panelist communications.

Panel maintenance is a dynamic process because the AmeriSpeak Panel is supplemented and refreshed regularly over time to grow the panel, compensate for panel attrition, and improve panel representation for specific subpopulations. For example, the Latino Panel and Teen Panel are created to support studies of Hispanics and teenagers, respectively; the 2019 recruitment is primarily designed to improve sample representation at the state level. As panelists are added or/and removed from the panel, the panel refreshment process takes place to ensure that the refreshed panel fully represents the corresponding target population.

### **ADDITIONAL RESOURCES**

To learn more about AmeriSpeak or to share an RFP, please contact AmeriSpeak at [AmeriSpeak-BD@norc.org](mailto:AmeriSpeak-BD@norc.org). Information about AmeriSpeak capabilities and research papers are available online at [AmeriSpeak.NORC.org](http://AmeriSpeak.NORC.org).