Technical Overview of the Foresight 50+® Probability -Based Research Panel
Updated June, 2024

This report summarizes the procedures for creating the AmeriSpeak Foresight 50+ Panel, a probability-based panel designed to be representative of the U.S. household population age 50 or older. A joint effort between AARP and NORC at the University of Chicago, Foresight 50+ integrates two sample sources or components: the subset of 50+ panelists recruited into the AmeriSpeak panel and a supplemental address-based sample (ABS). Both samples adhere to probability sampling principles, employ a rigorous sample design and recruitment methodology, and are designed to be representative of the 50+ U.S. population, including all 50 states and the District of Columbia. Foresight 50+ combines the commercial expertise of AARP with the trusted science of NORC to amplify the voice of this influential group of Americans. The panel currently contains 31,312 active panelists, which makes it the largest high-quality research panel of Americans aged 50 and over.

In this report, we first provide basic information about the sampling design and recruitment method associated with each sample source. We then discuss the integration of the panelists from these two sample sources to create the Foresight 50+, focusing on how the Foresight 50+ panel weights are developed to represent the target population.

AmeriSpeak Samples

Most Foresight 50+ panelists have been recruited based on their membership in the AmeriSpeak Panel. When the Foresight 50+ Panel was first constructed in 2021, 79.1% (n=21,202) of the panelists were recruited through AmeriSpeak. Since then, all new recruits have come from AmeriSpeak. AmeriSpeak panelists currently account for 81.9% of the panel as of April 2024. Since all future recruits will only come from AmeriSpeak, it's share in the full panel will continue to increase.

AmeriSpeak annual recruitment samples are selected from The NORC National Frame (or master sample) and supplemental ABS frames developed from the U.S. Postal Service Delivery Sequence File (DSF). Prior to the 2024 recruitments, the NORC National Frame was based on data from the 2010 U.S. decennial census. The 2010 NORC National Frame is a multistage probability sample that fully represents the U.S. household population. 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. Within the selected NFAs, the secondary sampling units (SSUs) are area segments defined from Census tracts or block groups, where each segment contains at least 300 housing units according to the 2010 Census.

Within the selected segments, all housing units are listed using the (DSF. In 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 2010 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 in-person listing.

In addition to NORC's National Frame, the DSF is frequently used as a supplemental sample frame to improve AmeriSpeak coverage in certain states. Although nationally representative, the 2010 National Frame did not include households from Alaska, Iowa, North Dakota, and Wyoming. Since 2016, the annual panel recruitment sample has included a small ABS from these four states to assure AmeriSpeak presence in all U.S. States and Washington, D.C. Supplemental ABS samples have also been used in other states to improve state-level panel representativeness. The 2019 recruitments exclusively relied on the DSF frame, taking most of the samples from areas not covered by the 2010 National Frame.

AmeriSpeak recruitment sample design has undergone some changes over the years. From 2014 to 2018, and again in 2020, the sample design featured six sampling strata based on the race/ethnicity and age composition of each segment. Areas with a higher concentration of young adults, Hispanics, and non-Hispanic African-Americans were oversampled to improve their representation in the panel. In 2019, AmeriSpeak adopted a national ABS frame and a two-phase design where commercial vendor data were used to stratify the second phase sample to improve the efficiency of targeting hard-to-reach populations. From 2021 to 2023, AmeriSpeak sample design was based on Big Data Classifier models, where the sampling strata were defined from model-predicted household characteristics and the hard-to-reach populations (e.g., Spanish speakers, young adults, high school diploma or less, household income over 200K, households with children, etc.) were oversampled to improve the demographic balance of the panel.

AmeriSpeak recruitment is a two-stage process: (i) initial recruitment using four USPS mailings, telephone contact, and both pre ($5) and post ($25-$50) incentives, and (ii) a more elaborate nonresponse follow-up (NRFU) recruitment that includes an invitation packet sent via Federal Express, additional incentives, and in-person field visits by NORC field interviewers. 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. AmeriSpeak is considered the highest effort, and highest response rate probability panel survey in the United States.

A sample household is considered recruited or responded if at least one adult in the household joins the panel. Through the 2023 recruitments, the weighted household response rate (AAPOR RR3) is about 6% for initial recruitment and 28% for NRFU recruitment. Across all recruitment years, the cumulative weighted household response rate is 24.4%; across recruitment years with NRFU (primarily due to COVID not all years included a NRFU), the cumulative weighted household response rate is 32.9%. AmeriSpeak panelists who are 50 years of age or older are all included in the Foresight 50+ Panel.

For more detailed information about AmeriSpeak sample design and recruitments, please the AmeriSpeak full technical document at amerispeak.norc.org.

Supplemental Address-Based Samples

About one fifth of the original Foresight 50+ Panel consists of panelists recruited into a supplemental probability-based national ABS sample selected from a National Consumer Address File. The proportion of the panel from supplemental ABS is growing smaller over time, however, as the use of this approach ended in 2019. From 2015 to 2019, these panelists were recruited annually via a stratified random sample from a national household address file that was assessed to have over 96% coverage of all 50+ adults in the U.S. The six sampling strata were defined by age (50-59, 60-69, 70+) and AARP membership status. Sample households were recruited through a series of mailings, phone contacts (for those households with a phone number), and online contacts (for those households with an email address). The major recruitment steps were:

- Step 1 – All households received postal mail inviting them to join the panel by either a) going online to a specific website or b) calling a toll-free number. Included in this invitation was a pre-paid incentive of $1.

- Step 2 – All households for which an email address was appended and verified received an email invitation to join the panel (in addition to the postal mail invitation outlined in Step 1).

- Step 3 – Households that did not respond in Step 1 or Step 2, excluding those who refused, AND where a phone number was available, received a series of reminder phone calls.

- Step 4 – All those who did not respond in Step 3 (excluding those who refused) AND all those from Step 1 and 2 without a phone number or email available, received a second postal mail invite that included a registration card to be mailed back.

- Step 5 – All those who did not respond in Step 4 (excluding those who refused) receive a third and final postal mail invite in the form of a large postcard urging them to respond and letting them know this was their final opportunity to join the panel.

In 2021, when Foresight 50+ was created with the integration of panelists from the two sample sources, explicit consent was requested of the 12,205 respondents who were recruited from the supplemental ABS samples to join this integrated panel. A total of 5,900 gave consent and are currently part of the Foresight 50+ Panel.

Foresight 50+ Panel Weighting Procedures

Foresight 50+ panel weights are developed in two steps:

- Compute panel weights for each sample separately;
- Compute final panel weights for the combined samples

The combined panel represents the U.S. population aged 50 and over.

AmeriSpeak Panel Weights

To develop the AmeriSpeak panel weights, NORC first computes the base weights as the inverse of the probabilities of selection into the recruitment sample. The AmeriSpeak sample design features sample stratification and unequal sampling rates across the sampling strata. In addition, AmeriSpeak conducts subsampling of initial nonresponding housing units for in-person nonresponse follow-up (NRFU). The final base weights reflect all the variations in panel sample selection probabilities across recruitment years and sample types. The base weights are then adjusted to account for unknown eligibility and nonresponse among eligible housing units. These nonresponse adjustments are conducted within weighting classes defined by geography and some household characteristics provided by commercial data vendors, including partisan score, the presence of young adult(s), and minority status. To produce the final household-level panel weights, the household-level nonresponse adjusted weights are post-stratified to match the number of households per census division obtained from the most recent Current Population Survey (CPS). Final household weights are assigned to each eligible adult in the recruited household. These person-level weights are then adjusted to compensate for nonresponding adults within a recruited household. Finally, the nonresponse adjusted person-level panel weights are calibrated to population benchmarks associated with the following variables:

- Age group
  - 18-24
  - 25-29
  - 30-39
  - 40-49
  - 50-59
  - 60-64
  - 65+ years

- Gender
  - Male
  - Female

- Education
  - Less than high school
  - High school graduate
  - Some college or less
  - Bachelor's or above

- Race
  - White
  - Black
  - AAPI
  - Other

- Ethnicity
  - Hispanic
  - Non-Hispanic

- Housing tenure
  - Owner
  - Other

- Household phone status
  - Cell-phone-only
  - Dual user
  - Landline-only/phoneless

- Age by gender

- Age by race/ethnicity

- Census Division

The population benchmarks are obtained from the CPS, except for Household Phone Status, which is determined by the National Institutes of Health bi-annual survey on wireless substitutions.[1] The weights adjusted to the population benchmarks are the *final panel weights* for panelists recruited into AmeriSpeak. For more details about AmeriSpeak panel weighting procedures, please see the AmeriSpeak technical overview at amerispeak.norc.org.

Supplemental Address-Based Sample Panel Weights

The original panel weights for the supplemental address-based sample are computed as the ratio of population size to the number of recruited panelists across the five recruitment years within each of the six sampling strata. The original panel weights are then adjusted to compensate for those who refused during the migration recruitment (meaning they were originally recruited into the supplemental panel but declined to join the integrated Foresight 50+ Panel). These adjustments are done within cells defined by crossing age, gender, race/ethnicity, and education. The weights are then raked to population benchmarks by age, gender, race/ethnicity, education, housing tenure, telephone status, and census division.

Final Foresight 50+ Panel Weights

In the final step, the AmeriSpeak and supplemental panel weights are combined to produce the final panel weights for the Foresight 50+ Panel. The weight combination is accomplished using a combination factor, k, which is proportional to the relative effective sample size per panel, where the effective sample size is defined as the nominal panel size divided by the weighting effect per panel. A different k is used for different combination cells defined by age, gender, race/ethnicity, and education. The resulting Foresight 50+ panel weights sum to the total U.S. population aged 50 and over.

The Foresight 50+ Panel is regularly refreshed to account for new recruits and changes to the existing panelist. Panel refreshment involves adding new panelists, removing panelists who dropped out of the panel, imputing missing data on key variables, and recomputing panel weights to reflect all the changes.

Additional Resources

To learn more about Foresight 50+ Panel, please email Foresight50-bd@norc.org or visit Foresight50.NORC.org.

---

[1] Blumberg SJ, Luke JV. Wireless substitution: Early Release of Estimates from the National Health Interview Survey, January-June 2021. National Center for Health Statistics. November 2021. Available from: https://www.cdc.gov/nchs/nhis.htm