## Using ACS Data to Construct and Analyze Couple-Level Characteristics in Stata

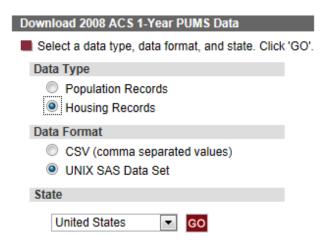
The American Community Survey (ACS) is a national survey that provides yearly data on households and individuals within households in the United States, including information on couples in coresidential (married or cohabiting) relationships. To determine whether individuals reside in same- and or opposite-sex coresidential relationships, it is necessary to identify individual's relationship to the household head, as well as the sex of both the individual and the household head. This information (relationship and sex) is contained on two different lines of data, complicating variable construction. This guide provides step-by-step instructions on how to manipulate the data to generate accurate indicators of coresidential relationships. Though providing only one example, the procedures outlined can be applied to other ACS variables.

The first sections of this guide outline the steps needed to obtain and prepare ACS data for analysis. Following these procedures, it will then provide detailed instruction on how to accurately construct indicators of same- and opposite-sex coresidential relationships. Please note that the ACS only records individual relationships with respect to the household head. Thus, you will not be able to use the ACS to identify the relationships between all individuals within a given household. The final section outlines the steps needed to generate weighted estimates of ACS data.

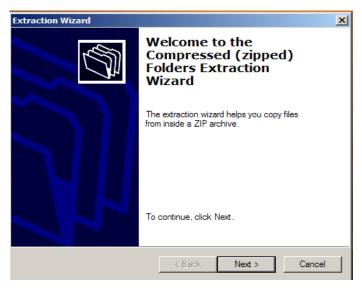
1. Obtain data from the ACS website:

http://www.census.gov/acs/www/data\_documentation/pums\_data/

- a. Select which year(s) of data you want to use
  - i. This example uses 2008 ACS 1-year PUMS
- b. Choose data type, data format, and state
  - i. This example uses <u>both</u> the Housing and Population Records in SAS format for the entire United States
    - Note that you download the data in SAS format, though you will eventually be using Stata
  - ii. Select the Housing Record first



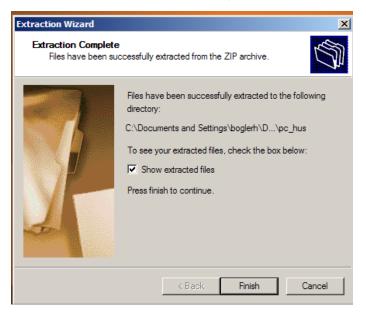
- c. Click "Go"
- d. Save to Desktop as pc\_hus.zip (pc\_pus.zip for Population Record)
- e. Right click the pc\_hus.zip icon on the desktop
- f. Click "Extract All..."
- g. Follow the Extraction Wizard: Select "Next"



h. Assign location for file extraction, then click "Next"

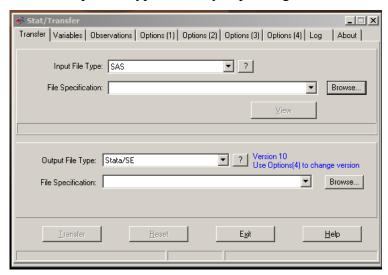


i. Check "Show extracted files" box, then click "Finish"

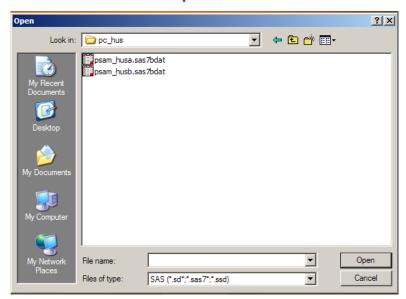


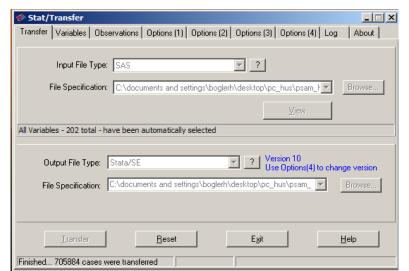
- j. Once open, the folder should contain 4 files:
  - 01ACS2008\_PUMS\_README.pdf
  - ACS\_2006\_2008\_PUMS\_Re-release.pdf
  - psam\_husa.sas7bdat (psam\_pusa.sas7bdat if Population Record)
  - **psam\_husb.sas7bdat** (**psam\_pusb.sas7bdat** if Population Record)
- k. Repeat steps c through j using the Population Record
  - i. Note that there are 2 Housing Records and 2 Population Records; this is due to the large size of the ACS

- Use Stat/Transfer to convert your 4 data files (e.g., psam\_husa.sas7bdat, psam\_husb.sas7bdat, psam\_pusa.sas7bdat, and psam\_pusb.sas7bdat) into Stata format:
  - a. Open Stat/Transfer
  - b. Select SAS as "Input File Type" and Stata v. 10 as "Output File Type"
    - i. The output file type will vary depending on which version of Stata you are using



c. Click "Browse" and select psam\_husa.sas





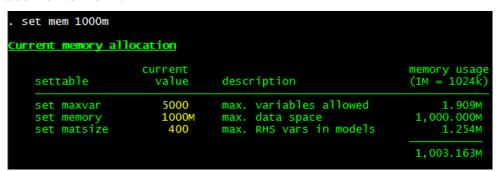
d. Click "Transfer", and exit Stat/Transfer when the operation is completed

- e. Repeat steps a through d for the remaining 3 files
- f. By the end of the operation you should have the following 4 files:
  - psam\_husa.dta
  - psam\_husb.dta
  - psam\_pusa.dta
  - psam\_pusb.dta
- g. If you do not have access to Stat/Transfer please refer to the following, <a href="http://www.bgsu.edu/downloads/cas/file97319.pdf">http://www.bgsu.edu/downloads/cas/file97319.pdf</a>. This document will guide you on how to read CSV (comma separated values) data into Stata, the other data format provided by the ACS website.

### 3. Retain Key Variables:

- a. Due to the large size of the ACS you will want to give yourself a large memory (RAM) allocation. 1000-1200m is recommended, so you will want to close all non-essential programs.
  - i. Stata code:

```
set more off
set mem 1000m
set maxvar 32767
```



- b. Given the large size of the data you will want to drop all non-essential variables. The essential variables <u>for this example</u> are outlined; however, the variables you select may change with your focus.
  - For a complete list and description of variables found in both the Housing and Population Records, download the ACS data dictionary at <a href="http://www.census.gov/acs/www/data\_documentation/pums\_documentation/">http://www.census.gov/acs/www/data\_documentation/pums\_documentation/</a>
- c. The Housing Record
  - i. Essential variables:
    - Housing unit (serialno)
    - Number of person records following housing record (np)
    - Unmarried partner household (partner)
  - ii. Stata code:

```
use "C:\psam_husa.dta"
keep serialno np partner
count
sort serialno
save "C:\psam_husa_001.dta"
```

```
. use "R:\CFDR\CFDR\Ryan\Same-Sex Couples work\PUMS_ACS2008_TEST\pc_hus\psam_husa.dta"
. keep serialno np partner
. count
705884
. sort serialno
. save "R:\CFDR\CFDR\Ryan\Same-Sex Couples work\PUMS_ACS2008_TEST\pc_hus\psam_husa_001.dta"
file R:\CFDR\CFDR\Ryan\Same-Sex Couples work\PUMS_ACS2008_TEST\pc_hus\psam_husa_001.dta saved
```

- Take note of results for the count command
- Perform again using "C:\psam\_husb.dta"; results for count command should be equal to 667,282.

## d. The Population Record

- i. Essential variables:
  - Housing unit (serialno)
  - Person number (sporder)
  - Person weight replicate (pwgtp)
  - Person age (agep)
  - Marital status (mar)
  - Relationship (rel)
  - Sex (sex)

#### ii. Stata code:

```
use "C:\psam_pusa.dta"
keep serialno sporder mar agep rel sex pwgtp*
count
sort serialno sporder
save "C:\psam_pusa_001.dta"
```

```
. use "R:\CFDR\CFDR\Ryan\Same-Sex Couples Work\PUMS_ACS2008_TEST\pc_pus\psam_pusa.dta", clear
. keep serialno sporder mar agep rel sex pwgtp*
. count
1548768
. sort serialno sporder
. save "R:\CFDR\CFDR\Ryan\Same-Sex Couples Work\PUMS_ACS2008_TEST\pc_pus\psam_pusa_001.dta"
file R:\CFDR\CFDR\Ryan\Same-Sex Couples Work\PUMS_ACS2008_TEST\pc_pus\psam_pusa_001.dta
```

Please note that the command keep pwgtp\* retains <u>all</u> variables with that prefix:
 this includes not only the person weight replicate (pwgtp), but also all 80

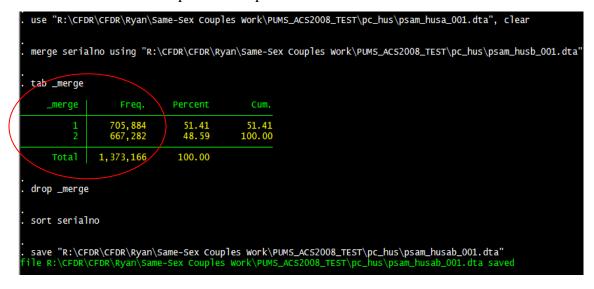
population weights (pwgtp1 – pwgtp80). These variables are necessary to generate weighted estimates.

- Take note of results for the count command
- Perform again using "C:\psam\_pusb.dta"; results for count command should be equal to 1,451,889.

- 4. Append and Merge Data:
  - a. Appending the Housing Records (psam\_husa\_001.dta & psam\_husb\_001.dta)
    - i. Stata code:

```
use "C:\psam_husa_001.dta", clear
merge serialno using "C:/psam_husb_001.dta"
tab _merge
drop _merge
sort serialno
save "C:\psam_husab_001.dta"
```

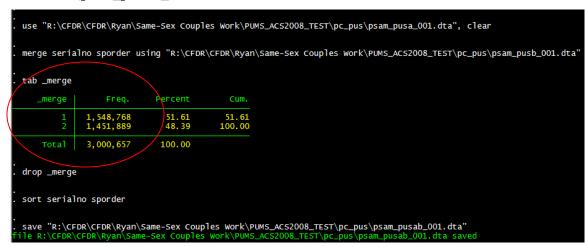
Though technically an append, using the merge command will generate a useful variable (\_merge) which indicates the number of cases read in from each file.
 The tab \_merge command should correspond to results from the count commands in the previous steps.



# b. Appending the Population Records (psam\_pusa\_001.dta & psam\_pusb\_001.dta)

## i. Stata code:

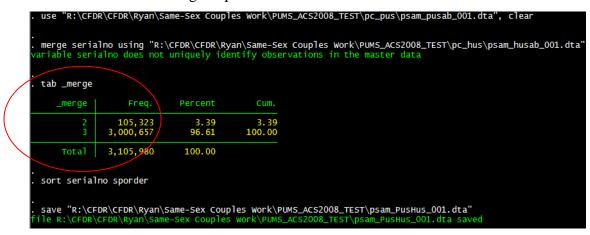
```
use "C:\psam_pusa_001.dta", clear
merge serialno sporder using "C:\psam_pusb_001.dta"
tab _merge
drop _merge
sort serialno sporder
save "C:\psam_pusab_001.dta"
```



- c. Merging Population and Housing Records (one-to-many merge)
  - i. Stata code:

```
use "C:\psam_pusab_001.dta", clear
merge serialno using "C:\psam_husab_001.dta"
tab _merge
sort serialno sporder
save "C:\psam_PusHus_001.dta"
```

 You <u>must</u> treat the Population Record as the master dataset (achieved through use "C:\psam\_pusab\_001.dta", clear), otherwise you will lose information during the procedure



ii. Once completed you might see this message...

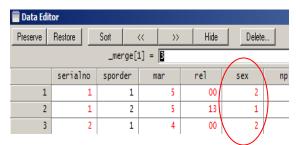
merge serialno using "R:\CFDR\CFDR\Ryan\Same-Sex Couples Work\PUMS\_ACS2008\_TEST\pc\_hus\psam\_husab\_001.dta"

variable serialno does not uniquely identify observations in the master data

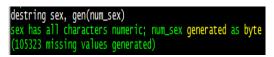
- Don't be alarmed! This is normal, as serialno is certainly not unique in either the Housing or Population Records.
- The message is simply informative. If you have followed the procedure as outlined above the merge should have occurred without any problems.

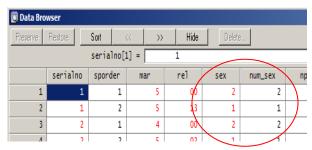
#### 5. Convert to Numeric:

- a. Conversion from **string** to **numeric** format
  - i. In most cases the variable values will automatically be string format (identified as red values in the data editor/browser) in your ACS download. These have to be converted to numeric format (identified as black values in the data editor/browser, or blue values if labels are attached) for the purposes of analysis; otherwise you will get a type mismatch.
    - This example uses the variable sex, however many variables in your downloaded
      data (including those used later in this example) are in string format and will have
      to be changed; use the following commands as needed.



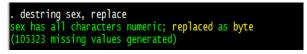
- ii. When converting you may either replace **numeric** characters for **string OR** create a **numeric** analog to the given **string** variable
- iii. Stata code:
  - Create a numeric analog for a string variable destring sex, gen (num\_sex)





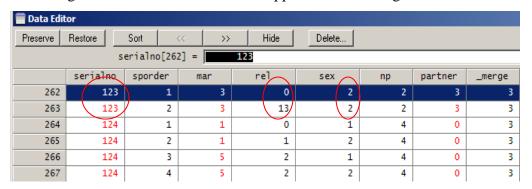
• **OR**, replace string for numeric

destring sex, replace



Data Browser					
Preserve	Restore	Sort	<< >>	Hide	Delete
serialno[1] = 1					
	serialno	sporder	mar	rel	sex
1	1	1	5	00	2
2	1	2	5	13	1
3	2	1	4	00	2
Δ	2	2	5	02	1

- 6. Constructing Couple-Level Characteristics.
  - a. This example is interested in identifying individuals in same-sex relationships, and examining differences between those in opposite-sex marriages and cohabitations.

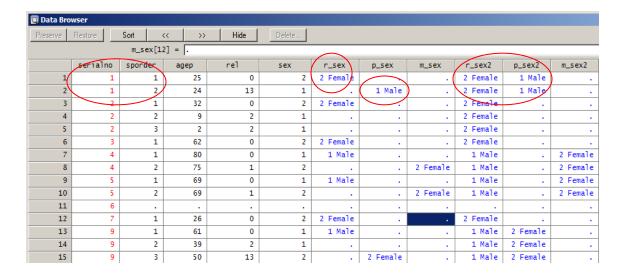


- b. The variable rel indicates the relationship of each individual within a household with respect to the household head; individual households are identified by the variable serialno. Household 123 has two members; a household head (sporder = 1, rel = 0) and an unmarried partner (sporder = 2, rel = 13). Notice that the sex of the head and the unmarried partner is the same; this is a same-sex relationship. However, because this information is contained on **separate lines**, you cannot identify this characteristics without first manipulating the data.
- c. Identify the sex of the household head and the unmarried partner (or spouse), and recode as <a href="mailto:three">three</a> new variables: <a href="mailto:r\_sex">r\_sex</a> (sex of household head), <a href="mailto:p\_sex">p\_sex</a> (sex of unmarried partner), and <a href="mailto:m\_sex">m\_sex</a> (sex of spouse).
  - i. Stata code:

```
gen r_sex=sex if rel==00
gen p_sex=sex if rel==13
gen m_sex=sex if rel==01
```

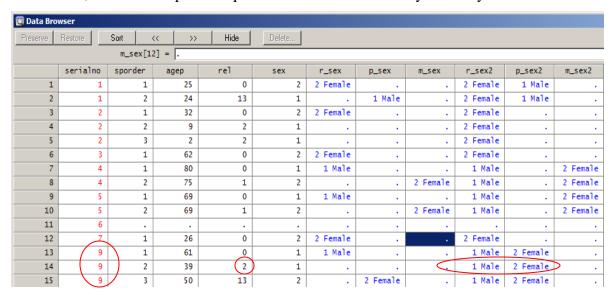
- d. Create indicators of sex of the household head and spouse/unmarried partner which will be placed on the line of information for each individual within a specific household.
  - i. Stata code:

```
by serialno: egen r_sex2=max(r_sex)
by serialno: egen p_sex2=max(p_sex)
by serialno: egen m_sex2=max(m_sex)
```



- ii. The egen command created a new variable with values for each individual within a household (by serialno).
  - For the first household (serialno = 1), the maximum value for r\_sex (= 2) and the maximum value for p\_sex (= 1) were placed in r\_sex2 and p\_sex2 respectively.
  - Thus, the first individual in the first household (serialno = 1, sporder = 1),
    now has values of 2 and 1 for r\_sex2 and p\_sex2, even though data is missing
    on p\_sex for this individual.
  - Please note that the above code does not include value labels, and your view of the data editor/browser (while still containing the correct values) will be different.
     Please refer to the attached .do file for value label codes.

e. Although couple-level characteristics are now included on individual lines of information, two more steps are required before the data is ready for analysis.

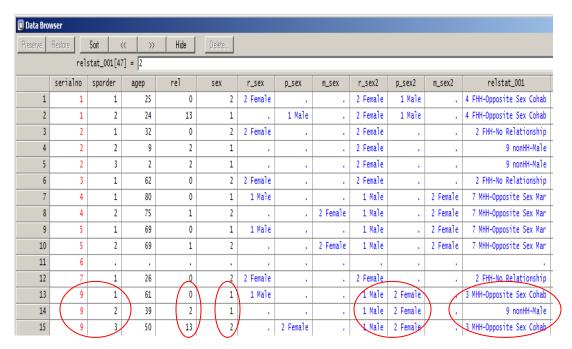


f. Take note of the ninth household (serialno = 9). It contains a biological son of the household head (sporder = 2, rel = 2). This individual is not in a romantic relationship with the head, and yet his values for r\_sex2 and p\_sex2 accurately reflect the sex of the head and the head's unmarried partner. If you were to use r\_sex2 and p\_sex2 to construct an indicator of relationship type, you would mistakenly identify this individual as engaged in opposite-sex cohabitation. Create a new variable to distinguish between those in a relationship with the head, and those who are just living in the household.

- g. Use r\_sex2, p\_sex2, and m\_sex2 to create a complex indicator (relstat\_001) of sex and relationship type where...
  - 1 = no relationship, household head male
  - 2 = no relationship, household head female
  - 3 = opposite-sex cohabitation, household head male
  - 4 = opposite-sex cohabitation, household head female
  - 5 = same-sex cohabitation, household head male
  - 6 = same-sex cohabitation, household head female
  - 7 = opposite-sex marriage, household head male
  - 8 = opposite-sex marriage, household head female
  - 9 = no recorded romantic relationship, male householder
  - 10 = no recorded romantic relationship, female householder
  - 161 = male in institutional group quarters
  - 162 = female in institutional group quarters
  - 171 = male in non-institutional group quarters
  - 172 = female in non-institutional group quarters
  - ii. Note that categories 1 8 <u>are not gender-specific</u>; these categories identify the <u>type of romantic relationship</u> by the <u>sex of the household head</u>. Categories 9 and 10 <u>are gender-specific</u>; these categories identify <u>the sex of individuals in household who are not in a romantic relationship with the head</u>. Categories 161 172 <u>are also gender-specific</u>; these categories identify the <u>sex of individuals in institutional and non-institutional group quarters</u>, with no set household head.

### iii. Stata code:

```
gen relstat 001=.
replace relstat_001=1 if r_sex2==1 & p_sex2==. & m_sex2==.
replace relstat_001=2 if r_sex2==2 & p_sex2==. & m_sex2==.
replace relstat_001=3 if r_sex2==1 & p_sex2==2
replace relstat_001=4 if r_sex2==2 & p_sex2==1
replace relstat_001=5 if r_sex2==1 & p_sex2==1
replace relstat_001=6 if r_sex2==2 & p_sex2==2
replace relstat_001=7 if r_sex2==1 & m_sex2==2
replace relstat_001=8 if r_sex2==2 & m_sex2==1
replace relstat 001=9 if sex==1 & rel!=. & rel!=0 & rel!=1 & rel!=13 &
rel!=16 & rel!=17
replace relstat_001=10 if sex==2 & rel!=. & rel!=0 & rel!=1 & rel!=13 &
rel!=16 & rel!=17
replace relstat_001=161 if sex==1 & rel==16
replace relstat_001=162 if sex==2 & rel==16
replace relstat_001=171 if sex==1 & rel==17
replace relstat 001=172 if sex==2 & rel==17
```

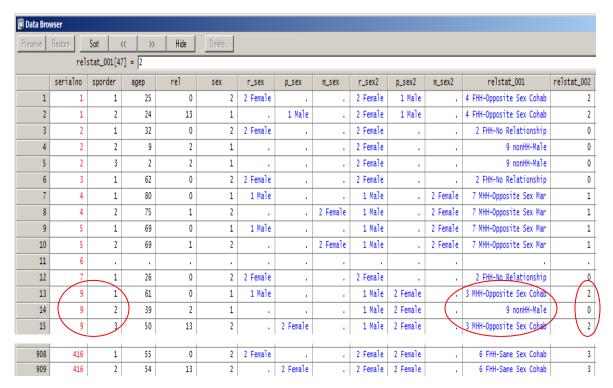


- Again, please note that the above commands will not produce value labels. Please refer to the attached .do file for value label codes.
- h. Using information from relstat\_001, now create a simple categorical indicator for use in analysis where...
  - 0 = no romantic coresidential union
  - 1 = opposite-sex marriage
  - 2 = opposite-sex cohabitation
  - 3 = same-sex cohabitation

#### ii. Stata code:

```
gen relstat_002=.
replace relstat_002=0 if (relstat_001==1|relstat_001==2|relstat_001==9|
relstat_001==10|relstat_001==161|relstat_001==162|relstat_001==171|
relstat_001==172)
replace relstat_002=1 if (relstat_001==7|relstat_001==8)
replace relstat_002=2 if (relstat_001==3|relstat_001==4)
replace relstat_002=3 if (relstat_001==5|relstat_001==6)
```

Now only those actually in some coresidential relationship (at least those in one
with the household head) are recorded as such



- For example, the ninth household (serialno = 9) has three members. The head (sporder = 1) and the unmarried partner (sporder = 3) receive values of 2 for relstat\_002, indicating that they are both in opposite-sex cohabiting relationships. The other member of the household (sporder = 2) is not in a recorded relationship and therefore receives a 0 for relstat\_002.
- The data is now ready for further analysis.

## 7. Applying Weights in ACS

- a. Applying weights in ACS is essential for generating accurate population estimates. Since you constructed the indicator for union type using the Population Record, you will want to use the population weight (pwgtp) and the population weight replicates (pwgtp1 pwgtp80):
- b. Set your data for survey weights
  - i. Stata code:

```
svyset [iw=pwgtp], jkrweight(pwgtp1-pwgtp80, multiplier (.05))
vce(jackknife) mse
```

- Utilizing svyset will not fundamentally change your data in any way
- To perform analyses using the weights you will have to recall the svy prefix for any proceeding commands

```
iweight: pwgtp
    VCE: jackknife
        MSE: on
    jkrweight pwgtp1 pwgtp2 pwgtp3 pwgtp4 pwgtp5 pwgtp6 pwgtp7 pwgtp8 pwgtp9 pwgtp10 pwgtp11 pwgtp12 pwgtp13 pwgtp14 pwgtp15
        pwgtp16 pwgtp17 pwgtp18 pwgtp19 pwgtp20 pwgtp21 pwgtp22 pwgtp23 pwgtp24 pwgtp25 pwgtp26 pwgtp26 pwgtp29 pwgtp30 pwgtp31 pwgtp31 pwgtp32 pwgtp33 pwgtp34 pwgtp35 pwgtp36 pwgtp37 pwgtp38 pwgtp39 pwgtp40 pwgtp41 pwgtp42 pwgtp43
        pwgtp44 pwgtp45 pwgtp46 pwgtp47 pwgtp48 pwgtp49 pwgtp50 pwgtp50 pwgtp52 pwgtp52 pwgtp53 pwgtp54 pwgtp55 pwgtp56 pwgtp57
        pwgtp58 pwgtp59 pwgtp60 pwgtp61 pwgtp62 pwgtp63 pwgtp64 pwgtp65 pwgtp65 pwgtp66 pwgtp67 pwgtp70 pwgtp71
        pwgtp72 pwgtp73 pwgtp74 pwgtp75 pwgtp76 pwgtp77 pwgtp78 pwgtp79 pwgtp80

Single unit: missing
    Strata 1: <one>
        SU 1: <observations>
        FPC 1: <zero>
```

- c. Try a simple crosstab (agep by relstat\_002) using the weights
  - i. Stata code:

```
svy: tab agep relstat_002, count cellwidth(20) format(%15.2g)
```

```
    . svy: tab agep relstat_002, count cellwidth(20) format(%15.2g)
no room to add more variables because of width
        An attempt was made to add a variable that would have increased the memory required to store an observation beyond what is currently possible. You have the following alternatives:
        1. Store existing variables more efficiently; see help compress.
        2. Drop some variables or observations; see help drop. (Think of Stata's data area as the area of a rectangle; Stata can trade off width and length.)
        3. Increase the amount of memory allocated to the data area using the set memory command; see help memory.
r(902);
```

- ii. What does the error mean? Applying weights means that Stata must perform an estimation for every category of agep (1-98) by every category of relstat\_002 (0-
  - 3). Stata does not have enough memory (RAM) to perform this command. What should you do?
- d. Say you are only interested in a certain cluster of ages (24 to 33 years in this example). The variable should be modified to account for Stata's memory limitations.
- e. Create a new variable which collapses age
  - i. Stata code:

```
gen agep_002=agep
replace agep_002=0 if agep<24 & agep!=.
replace agep_002=1 if agep>33 & agep!=.
```

- f. Try running the svy command again, but this time using your variable of age with collapsed categories
  - i. **CAUTION**: The following command takes a considerable amount of time to run (approximately 30 minutes), make sure to plan accordingly.
  - ii. Stata code:

```
svy: tab agep_002 relstat_002, count cellwidth(20) format(%15.2g)
```

• Please note that the command count cellwidth(20) format (%15.2g) which follows the tab command is atypical; this command is not necessary for un-weighted data. However, the count option is required in order to generate the weighted number of individuals in each cell. Options cellwidth(20) and format(%15.2g) ensure that the results will be displayed properly.

### 8. Using the accompanying .do file:

- a. The attached .do file contains the appropriate commands to perform the procedures and analyses outlined above once you have obtained your ACS data.
- b. READ THROUGH THE .do PRIOR TO RUNNING!!!
- c. You will have to change the path names, and the list of variables you want to keep or drop will vary from those used in this example.
- d. The preceding outline gives you several options for structuring your data; make sure that the .do reflects your desired structure.
- e. The attached .do also contains commands for variable and value labels; these were not illustrated above.

# 9. Additional CFDR Guides for Analyzing Census Data:

- a. To append ACS files using SAS, please see
   <a href="http://www.bgsu.edu/downloads/cas/file97318.pdf">http://www.bgsu.edu/downloads/cas/file97318.pdf</a>.
- b. To append ACS files using Stata, please see <a href="http://www.bgsu.edu/downloads/cas/file97319.pdf">http://www.bgsu.edu/downloads/cas/file97319.pdf</a>.
- c. To attach spouse information in the Current Population Survey (CPS) using SAS, please see <a href="http://www.bgsu.edu/downloads/cas/file37390.pdf">http://www.bgsu.edu/downloads/cas/file37390.pdf</a>.
- d. To create cohabitation files in the Public Use Microdata Samples (PUMS) using SAS, please see <a href="http://www.bgsu.edu/downloads/cas/file37389.pdf">http://www.bgsu.edu/downloads/cas/file37389.pdf</a>.
- e. For additional guidance on using weights in ACS (using both SAS and Stata), please see <a href="http://www.bgsu.edu/downloads/cas/file75747.pdf">http://www.bgsu.edu/downloads/cas/file75747.pdf</a>.