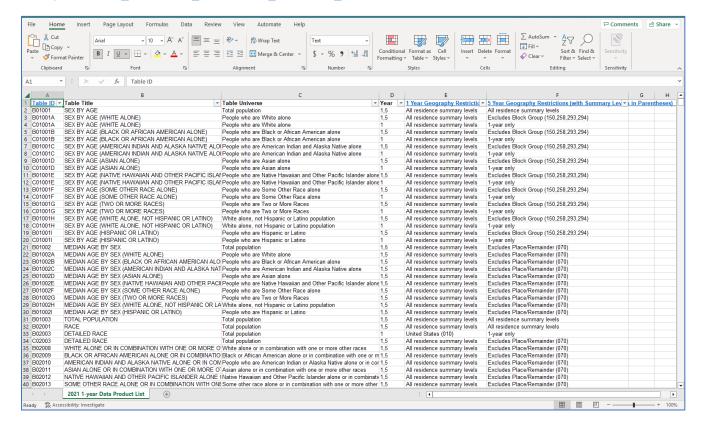
# How to acquire and process American Community Survey 5-Year Estimates Demographics to link to MassGIS' Census 2020 Geography Files - 1/30/2023



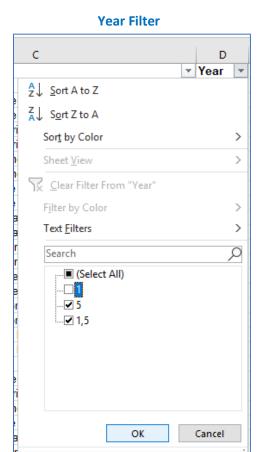
The following instructions were prepared by MassGIS to assist users who prefer a spreadsheet-driven approach in acquiring demographics data to link to the <u>Census 2020 geography files</u> processed for Massachusetts instead of the <u>Census APIs</u> or the Census' interactive <u>Explore Tables</u> interface. It focuses on the 5-year estimates produced by the 2021 American Community Survey (ACS), but the workflow can be modified to work with other vintages of ACS data published after 2020 (but not after 2029 when the 2030 Census geography will replace the 2020 geography).

This process uses the table-based format, not the sequence-based format, of ACS demographics tables. The <u>sequence-based format is being phased out</u> by the Census Bureau after 2021. This process also requires the user to have access to Excel or a similar spreadsheet software option and a basic understanding of its functionality. The ACS doesn't provide demographics at a level more granular than block groups, so this process is not suitable for use with the Census 2020 blocks geography. Please see the ACS <u>technical documentation</u> and <u>methodology</u> for a more comprehensive review of the program and its products.

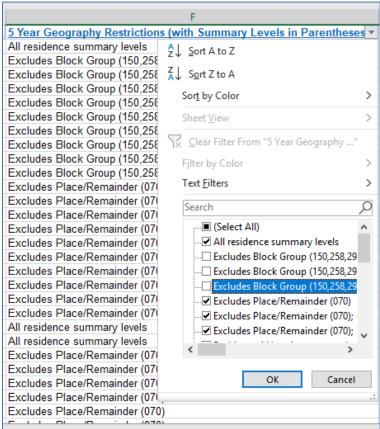
A list of all the demographics tables available from the 2021 ACS can be found in this spreadsheet hosted on the Census Bureau website: <a href="https://www2.census.gov/programs-surveys/acs/tech\_docs/table\_shells/table\_lists/2021\_DataProductList.xlsx">https://www2.census.gov/programs-surveys/acs/tech\_docs/table\_shells/table\_lists/2021\_DataProductList.xlsx</a>.



- **Download** this spreadsheet and **open** it in Excel (or similar spreadsheet software).
- In this spreadsheet, **apply filters** to column D ["Year"] and column F ["5 Year Geography Restrictions (with Summary Levels in Parentheses)"] to remove from consideration the tables that don't contain information for the 5 year-estimates and the levels of geography one is interested in.







The Year values should be "5" or "1,5" when looking for 5-year estimate tables.

The 5-Year Geography Restrictions filter will depend on which level of geography you want demographics for. The restriction values typically fall into two categories...

- a) The restriction explicitly lists a specific subset of available geographies, or
- b) The restriction implicitly includes all geographies not mentioned in an exclusion restriction (e.g. "Block Group (150, 258, 293, 294)" is a table that has demographics for all geographies the ACS aggregates data for except block groups)

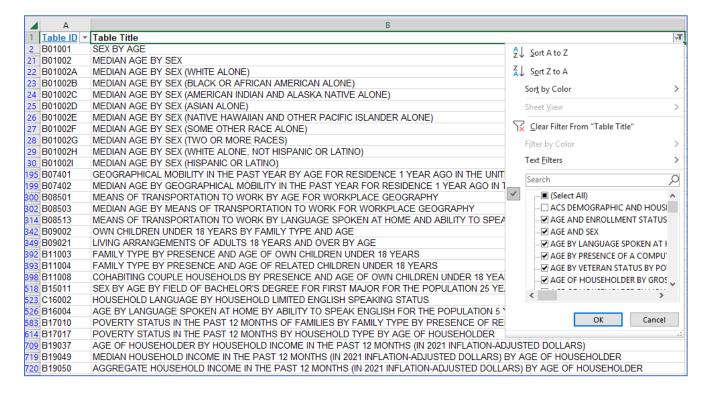
Note: The Census Bureau refers to cities and towns as "County Subdivisions" in the <u>geographic</u> <u>hierarchy</u>.

The following table denotes with a which geography restriction filters should be active to identify 5-year ACS demographics tables that are usable with each Census 2020 geography file available from MassGIS.

5-Year Geography Restriction	Block Groups	Census Tracts	County Subdivisions (Towns)
1-year only			
All residence summary levels	$\overline{\mathbf{V}}$	<b>✓</b>	$\overline{\mathbf{V}}$
Excludes Block Group (150,258,293,294)		$\checkmark$	$\overline{\mathbf{Z}}$
Excludes Block Group (150,258,293,294); excludes Puerto Rico		$\checkmark$	$\overline{\mathbf{Z}}$
Excludes Block Group (150,258,293,294); Puerto Rico only			
Excludes Place/Remainder (070)	$\overline{\mathbf{V}}$	<b>✓</b>	$\overline{\mathbf{Z}}$
Excludes Place/Remainder (070); excludes Puerto Rico	$\overline{\mathbf{V}}$	<b>✓</b>	✓
Excludes Place/Remainder (070); Puerto Rico only			
Residence 1 Year Ago geography; excludes Puerto Rico			
Residence 1 Year Ago geography; Puerto Rico only			
State (040); Puerto Rico only			
United States (010)			
United States (010), Region (020)			
United States (010), Region (020), Division (030), State (040)			
United States (010), Region (020), Division (030), State (040),			
Congressional District (500) United States (010), Region (020), Division (030), State (040); excludes Puerto Rico			
United States (010), Region (020), Division (030), State (040); Puerto Rico only			
United States (010), State (040)			
United States (010), State (040), County (050)			
United States (010), State (040), County (050), Census Tract (140), Block Group (150), Place (160), Congressional District (500), State Legislative District Upper (610), State Legislative District Lower (620)	<b>V</b>		
United States (010), State (040), County (050), Place (160)			
United States (010), State (040); excludes Puerto Rico			
United States (010), States (040), Metropolitan Division within Metropolitan Statistical Area (314), Combined Statistical Area (330), Congressional District (500), PUMA (795)			
Workplace geography			$\overline{\mathbf{Z}}$
Workplace geography; excludes County within Place (155)			
Workplace geography; excludes Place/Remainder (070) and County within Place (155)			<b>V</b>

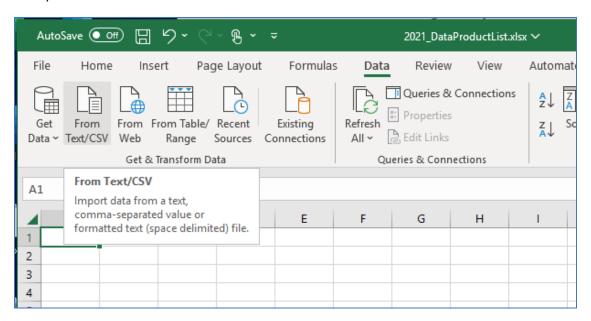
After the appropriate filters have been activated, **review** the remaining records shown in the worksheet. Column B ["Table Title"] provides an indication of the subject matter each ACS table contains and Column A ["Table ID"] is that table's unique ID used in its downloadable file name. (The Table ID naming scheme is explained on this page.)

One can narrow down the options by using the Search Bar in the Column B filter to search for common demographics keywords like "AGE", "RACE", "SEX", "INCOME", "DOLLARS", "WORK", "HOUSEHOLD", or other topics of interest. Additionally, only tables where the Table ID starts with "B" or "C" (but not "CP") are available from the data download site referenced in this document.

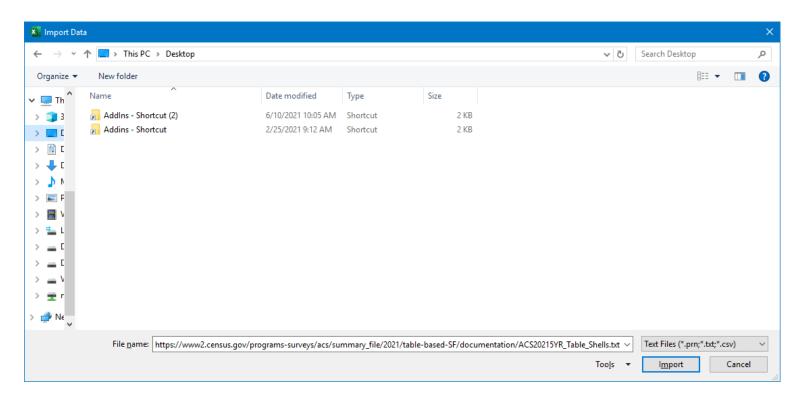


To discover the full set of attributes available in a given table, a second reference file is available from the Census Bureau; <a href="https://www2.census.gov/programs-surveys/acs/summary\_file/2021/table-based-SF/documentation/ACS20215YR\_Table\_Shells.txt">https://www2.census.gov/programs-surveys/acs/summary\_file/2021/table-based-SF/documentation/ACS20215YR\_Table\_Shells.txt</a> provides a comprehensive list of all attributes in all 2021 5-year estimates tables. For easier interactive review, it is recommended to add it as a new sheet in the copy of 2021\_DataProductList.xlsx you're working with. To do this...

> **Switch** to the Data tab in the Excel Ribbon, and in the Get & Transform Data group, **click** on "From text/CSV".



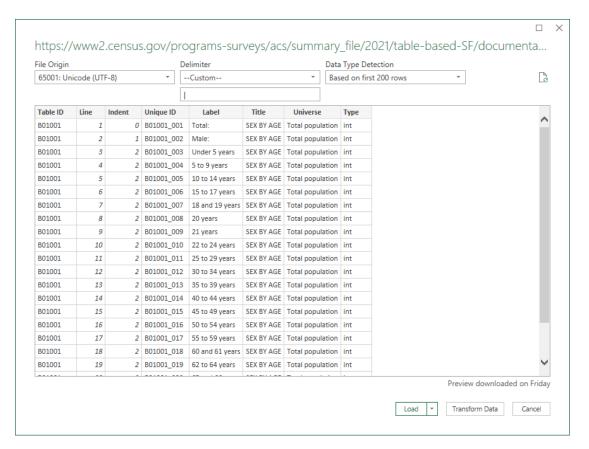
In the pop-up that appears, **enter** the table shell text file URL from the previous paragraph as the File name.



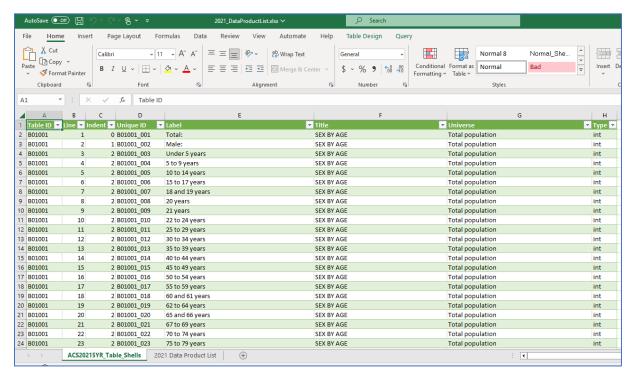
➤ **Click** on the button that says "Open" or "Import" (and make sure you have no firewall or internet restrictions). A new pop-up window may appear requesting confirmation of anonymous access to the Census website. **Click** "Connect" if this happens.



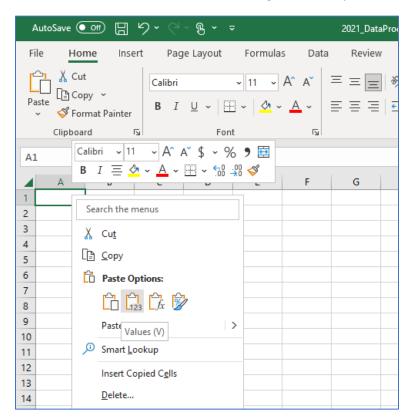
Alternately, if this is not your first time connecting anonymously to the Census website, choosing "Open" or "Import" should directly launch the data loading pop-up window...



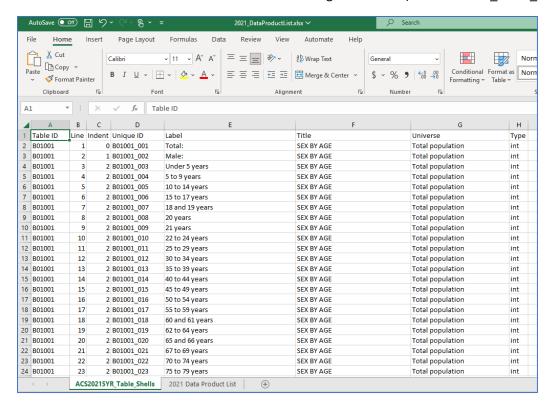
After confirming that the Delimiter is set to "—Custom—" and the pipe symbol "|" appears beneath it, click on the Load button. A new worksheet should appear named ACS20215YR\_Table\_Shells.



If one's internet connection is slow or unreliable, one can optionally **copy** the entire contents of this worksheet into a new worksheet in the same workbook, using the Paste option for "Values" only.



If optionally copying and pasting into a new worksheet: After the paste is complete, **delete** the original worksheet and **rename** the new worksheet to have the original's name ("ACS20215YR\_Table\_Shells").

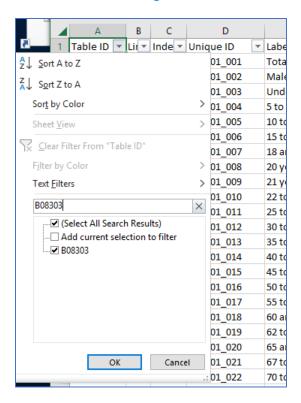


For a given table of interest in the Data Product List, **identify** its Table ID and **apply a filter** for that value in the Table Shells worksheet to see all the attributes available in that table.

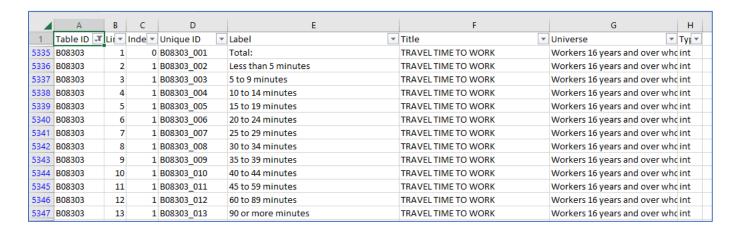
# Example: the selected record in the Data Product List is a table of interest with information about commuting times

248 B08018	PLACE OF WORK FOR WORKERS 16 YEARS AND OVER-NOT METROPOLITAN OR MICROPOLITAN STATISTICAL AREA LEVEL	Workers 16 years and over no
282 B08134	MEANS OF TRANSPORTATION TO WORK BY TRAVEL TIME TO WORK	Workers 16 years and over w
284 B08135	AGGREGATE TRAVEL TIME TO WORK (IN MINUTES) OF WORKERS BY TRAVEL TIME TO WORK	Workers 16 years and over w
285 B08136	AGGREGATE TRAVEL TIME TO WORK (IN MINUTES) OF WORKERS BY MEANS OF TRANSPORTATION TO WORK	Workers 16 years and over w
293 B08301	MEANS OF TRANSPORTATION TO WORK	Workers 16 years and over
295 B08302	TIME OF DEPARTURE TO GO TO WORK	Workers 16 years and over w
296 B08303	TRAVEL TIME TO WORK	Workers 16 years and over w
297 B08406	SEX OF WORKERS BY MEANS OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY	kers 16 years and over
299 B08412	SEX OF WORKERS BY TRAVEL TIME TO WORK FOR WORKPLACE GEOGRAPHY	kers 16 years and over w
300 B08501	MEANS OF TRANSPORTATION TO WORK BY AGE FOR WORKPLACE GEOGRAPHY	Workers 16 years and over
302 B08503	MEDIAN AGE BY MEANS OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY	Workers 16 years and over
303 B08505A	MEANS OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY (WHITE ALONE)	White alone workers 16 years

### A filter is applied in the Table Shells worksheet using that table's Table ID

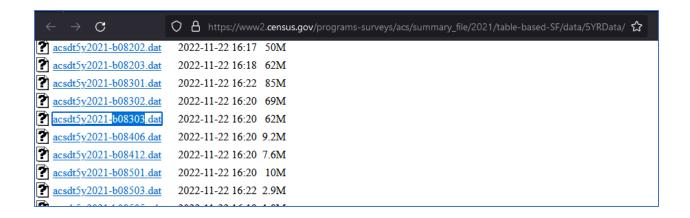


#### **Result in the Table Shells worksheet**



When a table is identified that contains demographics of interest to process for linking to the MassGIS processed Census 2020 geography files, locate it at the following Census Bureau website: <a href="https://www2.census.gov/programs-surveys/acs/summary\_file/2021/table-based-structure-based-struct

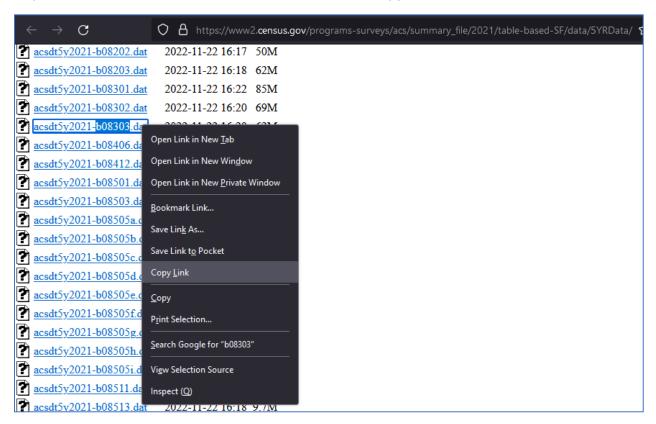
The Table ID is part of the .dat file's name.



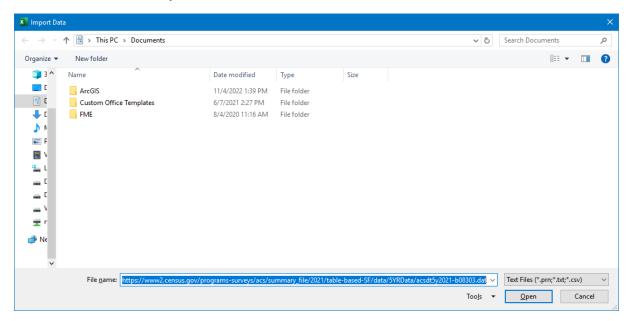
The next steps can take place within the same Excel workbook or a completely new one. This tutorial uses a new workbook to keep each subsequently downloaded ACS demographics table separate from each other.

> Open a blank Excel workbook and use the Excel Ribbon Data Tab's "From Text/CSV" option again to load the contents of the .dat file of interest. The .dat file's full URL can be acquired by right-clicking on the file and choosing the "Copy Link" option from within a browser.

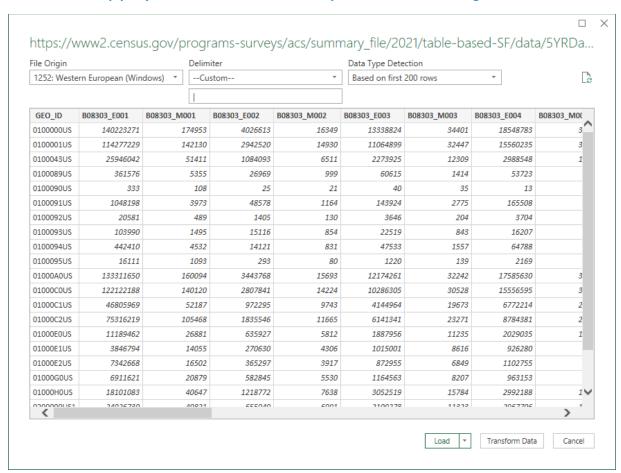
# Acquire the URL of the .dat file with the browser function "Copy Link"



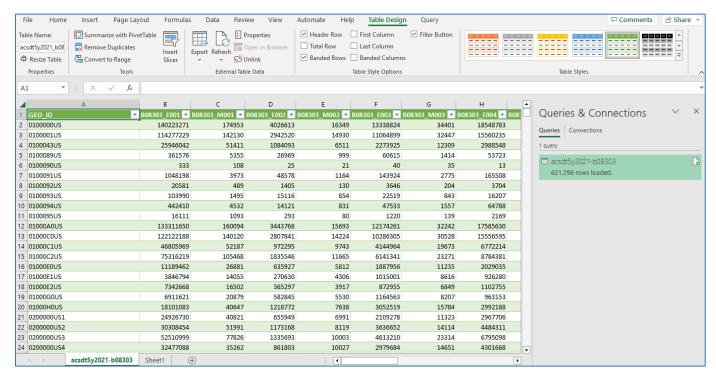
### Paste the URL into the Import Data window's File name textbox



# Confirm custom pipe symbol delimiter and field interpretation before loading



The loading process can take a significant amount of time since a given .dat file contains all the attributes recorded in that table for all the levels of geography the data is summarized at, so there can be hundreds of thousands of records for dozens of attributes.



For tables this large, there may be some performance improvements when working without the constraint of an external internet-enabled connection. As previously mentioned, one can optionally copy the entire contents of this worksheet into a new worksheet using the Paste option for "Values" only, delete the original worksheet, and rename the new worksheet to have the original's name.

In the worksheet containing the newly loaded .dat file's data, **rename** the first column from GEO\_ID to be ACS\_GEO\_ID. Then insert 3 new empty columns after the ACS\_GEO\_ID field. **Name** the first one STATE, the second one SUMLEVEL, and the third one GEOID20.

1		А	В	С	D	E	F	G	Н
1	ACS_GEO_ID	7	STATE *	SUMLEVEL -	GEOID20	B08303_E001 🔻	B08303_M001 💌	B08303_E002 💌	B08303_M002 💌 B0
2	0100000US			ļ		140223271	174953	4026613	16349
3	0100001US					114277229	142130	2942520	14930
4	0100043US					25946042	51411	1084093	6511
5	0100089US					361576	5355	26969	999
6	0100090US					333	108	25	21
7	0100091US					1048198	3973	48578	1164
8	0100092US					20581	489	1405	130
9	0100093US					103990	1495	15116	854
10	0100094US					442410	4532	14121	831
11	0100095US					16111	1093	293	80
12	01000A0US					133311650	160094	3443768	15693
13	01000C0US					122122188	140120	2807841	14224
14	01000C1US					46805969	52187	972295	9743
15	01000C2US					75316219	105468	1835546	11665
16	01000E0US					11189462	26881	635927	5812
17	01000E1US					3846794	14055	270630	4306
18	01000E2US					7342668	16502	365297	3917
19	01000G0US					6911621	20879	582845	5530
20	01000H0US					18101083	40647	1218772	7638
21	0200000US1					24926730	40821	655949	6991
22	0200000US2					30308454	51991	1173168	8119
23	0200000US3					52510999	77826	1335693	10003
24	0200000US4					32477088	35262	861803	10027
	$\leftarrow$	acsdt5y2021-b08303	+						

- In column B ["STATE"], calculate cell B2 to be " = MID(A2, 10, 2) " (without the quotes). This should auto-populate values for records in column B, but if it doesn't, do it manually (usually possible by selecting the first cell with the formula in it and double-clicking on its bottom right hand corner vertex). It's expected the first several records may continue to have empty STATE values because those records reflect national demographics.
- In column C ["SUMLEVEL"], calculate cell C2 to be " = LEFT(A2, 3) " (without the quotes). This should auto-populate values for records in column C, but if it doesn't, do it manually.
- ➤ In column D ["GEOID20"], calculate cell D2 to be " = RIGHT(A2, LEN(A2) FIND("US", A2) 1) " (without the quotes). This should auto-populate values for records in column D, but if it doesn't, do it manually.

# Appearance of example worksheet after populating the three new columns...

		А	В	С	D	E	F	G
1	ACS_GEO_ID	▼	STATE <b>*</b>	SUMLEVEL 🕶	GEOID20	B08303_E001 🔻	B08303_M001 💌	B08303_E002 💌 B0
2	0100000US	,		010		140223271	174953	4026613
3	0100001US			010		114277229	142130	2942520
4	0100043US			010		25946042	51411	1084093
5	0100089US			010		361576	5355	26969
6	0100090US			010		333	108	25
7	0100091US			010		1048198	3973	48578
8	0100092US			010		20581	489	1405
9	0100093US			010		103990	1495	15116
10	0100094US			010		442410	4532	14121
11	0100095US			010		16111	1093	293
12	01000A0US			010		133311650	160094	3443768
13	01000C0US			010		122122188	140120	2807841
14	01000C1US			010		46805969	52187	972295
15	01000C2US			010		75316219	105468	1835546
16	01000E0US			010		11189462	26881	635927
17	01000E1US			010		3846794	14055	270630
18	01000E2US			010		7342668	16502	365297
19	01000G0US			010		6911621	20879	582845
20	01000H0US			010		18101083	40647	1218772
21	0200000US1		1	020	1	24926730	40821	655949
22	0200000US2		2	020	2	30308454	51991	1173168
23	0200000US3		3	020	3	52510999	77826	1335693
24	0200000US4		4	020	4	32477088	35262	861803
	<b>←</b> →	acsdt5y2021-b08303	+			,		

# And records further down...

	ACS_GEO_ID -	STATE -	SUMLEVEL -	GEOID20 ▼	B08303_E001 🔻	B08303_M001 🔻	B08303_E002 ▼ B
198805	1400000US72153750501	72	140	72153750501	1631	405	133
198806	1400000US72153750502	72	140	72153750502	681	151	0
198807	1400000US72153750503	72	140	72153750503	422	136	0
198808	1400000US72153750601	72	140	72153750601	1484	335	0
198809	1400000US72153750602	72	140	72153750602	533	274	0
198810	1500000US010010201001	01	150	010010201001	308	118	48
198811	1500000US010010201002	01	150	010010201002	411	132	6
198812	1500000US010010202001	01	150	010010202001	299	87	0
198813	1500000US010010202002	01	150	010010202002	592	239	2
198814	1500000US010010203001	01	150	010010203001	1455	340	41

Activate a filter on the STATE field to only allow values of "25" to remain. ("25" is the <u>State FIPS</u> code for Massachusetts.) Keep this filter active while selecting the <u>summary level</u> next.

To capture demographics associated with...

- ... towns, activate a filter on SUMLEVEL to only capture values of "060".
- ... tracts, activate a filter on SUMLEVEL to only capture values of "140".
- ... block groups, activate a filter on SUMLEVEL to only capture values of "150".

With both STATE and SUMLEVEL filters active, the visible records should be copied to different worksheets for future use. It is recommended to assign names to those worksheets representative of the geography level captured. For this tutorial, it is assumed that the user wants to isolate and save records for the three levels of Census 2020 geography MassGIS has processed that are compatible with the ACS, and that the selected table has information recorded at each of those levels.

> Create 3 new worksheets in the workbook named "BLKGRPS", "TRACTS", and "TOWNS".

29	0200043US1		8372089	16536	4246784						
30	0200043US2		16608207	20595	8470533						
31	0200043US3		30558096	37324	15397980						
32	0200043US4		8432547	23628	4360554						
33	02000A0US1		55957212	-55555555	27422185						
34	02000A0US2		62564232	351	30984046						
→ acsdt5y2021-b01001 BLKGRPS TRACTS TOWNS ⊕											
Dan	du 502 Acces	cibility Investigate									

For each active STATE and SUMLEVEL filter combination, **copy and paste** the visible records from the .dat file's worksheet into the appropriately named destination worksheet based on the SUMLEVEL filter used (BLKGRPS, TRACTS, or TOWNS). It is recommended that the paste operation use the "Values" only option again.

#### Towns demographics where STATE = 25 and SUMLEVEL = 060

	ı						ı			1	1
	A	В	С	D	E	F	G	Н	I	J	K
1	ACS_GEO_ID	STATE	SUMLEVEL	GEOID20	B08303_E001	B08303_M001	B08303_E002	B08303_M002	B08303_E003	B08303_M003	B08303_E004
2	0600000US2500100000	25	060	2500100000	0	13	0	13	0	13	0
3	0600000US2500103690	25	060	2500103690	22970	758	795	223	3582	540	3817
4	0600000US2500107175	25	060	2500107175	9541	677	396	142	1126	296	1004
5	0600000US2500107980	25	060	2500107980	4093	448	46	48	367	188	861
6	0600000US2500112995	25	060	2500112995	2103	276	290	145	248	139	361
7	0600000US2500116775	25	060	2500116775	5867	516	289	148	608	128	1089
8	0600000US2500119295	25	060	2500119295	1880	315	51	63	275	95	285
9	0600000US2500123105	25	060	2500123105	13037	705	325	135	1680	354	3076
10	0600000US2500129020	25	060	2500129020	5828	496	353	171	918	323	1174
11	0600000US2500139100	25	060	2500139100	6754	363	64	37	693	201	1016

# Tracts demographics where STATE = 25 and SUMLEVEL = 140

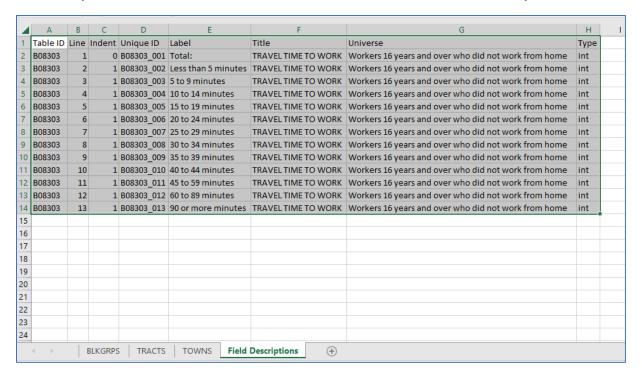
	A	В	С	D	E	F	G	н	1	J	К	L
1	ACS_GEO_ID	STATE	SUMLEVEL	GEOID20	B08303_E001	B08303_M001	B08303_E002	B08303_M002	B08303_E003	B08303_M003	B08303_E004	B08303_M004 B
2	1400000US25001010100	25	140	25001010100	1216	255	256	158	287	96	297	127
3	1400000US25001010206	25	140	25001010206	1503	264	154	100	180	87	310	138
4	1400000US25001010208	25	140	25001010208	522	208	33	44	180	129	76	54
5	1400000US25001010304	25	140	25001010304	998	233	11	17	181	77	199	74
6	1400000US25001010306	25	140	25001010306	882	236	40	61	94	65	86	68
7	1400000US25001010400	25	140	25001010400	1129	285	40	46	281	127	187	129
8	1400000US25001010500	25	140	25001010500	828	217	78	65	75	49	175	90
9	1400000US25001010600	25	140	25001010600	981	207	142	112	235	135	140	81
10	1400000US25001010700	25	140	25001010700	1122	215	148	77	13	22	221	87
11	1400000US25001010800	25	140	25001010800	1758	351	0	13	156	104	367	193
12	1400000US25001010900	25	140	25001010900	2335	348	46	48	211	153	494	222
13	1400000US25001011002	25	140	25001011002	1636	285	151	96	187	141	295	132
14	1400000US25001011100	25	140	25001011100	2688	532	160	140	540	286	663	293
15	1400000US25001011200	25	140	25001011200	1504	350	42	41	191	87	216	94
	******	A-				400				40		

# Block Groups demographics where STATE = 25 and SUMLEVEL = 150

1	А	В	С	D	E	F	G	н	I	J	К	L
1	ACS_GEO_ID	STATE	SUMLEVEL	GEOID20	B08303_E001	B08303_M001	B08303_E002	B08303_M002	B08303_E003	B08303_M003	B08303_E004	B08303_M004
2	1500000US250010101001	25	150	250010101001	395	190	97	113	72	55	111	75
3	1500000US250010101002	25	150	250010101002	136	73	11	18	40	34	28	22
4	1500000US250010101003	25	150	250010101003	226	92	29	38	51	52	72	45
5	1500000US250010101004	25	150	250010101004	187	127	0	13	58	46	50	82
6	1500000US250010101005	25	150	250010101005	272	148	119	109	66	63	36	33
7	1500000US250010102061	25	150	250010102061	456	220	84	91	46	53	108	104
8	1500000US250010102062	25	150	250010102062	489	180	35	48	26	31	176	104
9	1500000US250010102063	25	150	250010102063	558	176	35	46	108	64	26	29
10	1500000US250010102081	25	150	250010102081	224	140	0	13	149	117	0	13
11	1500000US250010102082	25	150	250010102082	204	108	32	44	31	50	47	43
12	1500000US250010102083	25	150	250010102083	94	81	1	3	0	13	29	34
13	1500000US250010103041	25	150	250010103041	477	153	11	17	63	49	109	62
14	1500000US250010103042	25	150	250010103042	251	94	0	13	52	27	46	41
15	1500000US250010103043	25	150	250010103043	270	192	0	13	66	60	44	32

- Once the desired Census geography worksheets are populated, one can delete the original full nationwide worksheet of demographics from the workbook. Then save the Excel workbook with a name that is the Table ID of the ACS table that was processed, or another more intuitive name if preferred.
- The native field names assigned to the demographic attributes don't lend themselves to easy interpretation. To facilitate understanding of the ambiguous field names, it is recommended to create an additional worksheet in the workbook, re-name it "Field Descriptions", and populate it with the records from the Table Shells worksheet prepared earlier in the process...

### Records copied from Table Shells worksheet filtered on the Table ID of the data file processed



It is important to remember that the "Unique ID" in the Field Descriptions worksheet assigned to each attribute as the basis of its field name appears in pairs in the ACS tables. (e.g., Unique ID B08303\_003 is the basis for two attribute names in table B08303... "B08303\_E003" and "B08303\_M003") The field names that include an "E" after the underscore indicate the field represents the estimated value of that attribute for that geographic feature. The field names that include an "M" after the underscore indicate that the field represents the margin-of-error (MOE) associated with the estimated value of that attribute for that geographic feature.

Optionally, one can attempt to rename the attributes in the processed tables with the information from the Table Shells or Field Descriptions worksheet. For example, B08303\_E003 represents the number of workers 16 years old and over who did not work from home and had a travel time to work between 5 and 9 minutes. One possible alternate field name could be "COMMUTE\_5\_9", and this could also be recorded next to the B08303\_003 entry in a new column in the Field Descriptions worksheet to maintain a lookup between the original and replacement field names.

At this stage, one can work directly with the Excel worksheets or export them to a preferable format (dBase tables for use with shapefiles\*\*, file geodatabase tables, enterprise database (e.g., Oracle) tables, etc...). The GEOID20 field in the worksheets should contain the same values found in the GEOID20 field in the MassGIS processed Census 2020 geography and can be used in standard joins and relates in the GIS environment. If exporting the ACS demographics to a different format, take care that the GEOID20 field is interpreted and recorded as a text field so that it matches the GEOID20 text field in the geography layers. Also make sure that the demographics captured at a particular geography level

are only joined or related to the geography layer of the same level (Block groups to block groups, census tracts to census tracts, towns to towns).

\*\* dBase tables are not recommended if the native ACS field names are kept intact. ACS field names are 11 characters long when accounting for the "E" and "M" identifiers needed to determine if a field is an estimate or a margin-of-error value. dBase tables truncate field names to have a maximum of 10 characters. The dBase table format may be acceptable if the field names are replaced with values 10 characters long or less.

Any technical questions about ACS data should be directed to Census Bureau resources and/or its <u>listed</u> <u>contacts</u>. For additional questions about this customized processing, please direct them to <u>massgismail@mass.gov</u>.