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spbalance — Make panel data strongly balanced

Description

spbalance reports whether panel data are strongly balanced and, optionally, makes them balanced if they are not.

The data are required to be xtset.

Quick start

Determine whether data are strongly balanced

    spbalance

Make data strongly balanced

    spbalance, balance

Menu

Statistics > Spatial autoregressive models

Syntax

Query whether data are strongly balanced

    spbalance

Make data strongly balanced if they are not

    spbalance, balance

collect is allowed; see **[U] 11.1.10 Prefix commands**.

Remarks and examples

Sp works with panel data but requires that they be strongly balanced. Panels are strongly balanced when each has the same number of observations and defines the same set of times. You can use spbalance before data are spset or after. Setting the data after is important because Sp data that were balanced can become unbalanced after merging additional data.

The data must be xtset before you can use spbalance:

```
. use https://www.stata-press.com/data/r19/counties
. spbalance
data not xtset
r(459);
. xtset fips time
Panel variable: fips (unbalanced)
 Time variable: time, 1 to 5, but with a gap
         Delta: 1 unit
. spbalance
  (data not strongly balanced)
    Type spbalance, balance to make the data strongly balanced by dropping
    observations.
```

Type spbalance, balance to make the data strongly balanced by dropping observations.

```
. spbalance, balance
  balancing data ...
    2,999 observations dropped.  Dropped was time == 3.  Data are now
    strongly balanced.
```

The dataset we started with contained data on five time periods for more than 3,000 US counties. Evidently, some of the panels did not have an observation for time 3. Now, none of the panels have data on time 3. If some panels had no observations on time 4, then all observations for time 4 would have been dropped too.

Balancing by dropping spatial units

spbalance balances data by dropping observations for time periods that do not appear in all panels. spbalance does not consider the alternative of balancing by dropping spatial units, but you may want to. Here's an example.

We downloaded shapefiles for all US counties in 2010. We use spshape2dta to create Stata Sp datasets:

```
. spshape2dta County_2010Census_DP1
  (importing .shp file)
  (importing .dbf file)
  (creating _ID spatial-unit id)
  (creating _CX coordinate)
  (creating _CY coordinate)
  file County_2010Census_DP1_shp.dta created
  file County_2010Census_DP1.dta     created
```

Our analysis dataset is cbp05_14co.dta consisting of US Census County Business Patterns data for the years 2005–2014. We load this dataset and merge into it the Sp dataset County_2010Census_DP1.dta created by spshape2dta.

```
. copy https://www.stata-press.com/data/r19/cbp05_14co.dta .
. use cbp05_14co, clear
```

```
. merge m:1 GEOID10 using County_2010Census_DP1

    Result                        Number of obs
    ─────────────────────────────────────────────
    Not matched                            444
        from master                        327  (_merge==1)
        from using                         117  (_merge==2)

    Matched                             31,035  (_merge==3)
    ─────────────────────────────────────────────

. keep if _merge == 3
(444 observations deleted)

. drop _merge

. save cbp05_14co_census
file cbp05_14co_census.dta saved
```

We xtset the data and check to see if it is balanced.

```
. xtset _ID year
Panel variable: _ID (unbalanced)
 Time variable: year, 2005 to 2014
        Delta: 1 unit

. spbalance
  (data not strongly balanced)
    Type spbalance, balance to make the data strongly balanced by dropping
    observations.
```

Both xtset and spbalance tell us the same thing: the data are unbalanced. We use spbalance, balance to balance it.

```
. spbalance, balance
  balancing data ...
    15,515 observations dropped.  Dropped were year == 2005, 2006, 2007,
    2008, 2009.  Data are now strongly balanced.
```

What? It dropped all the years 2005–2009.

Let's go back and see what was causing the data to be unbalanced.

```
. use cbp05_14co_census, clear

. bysort _ID: gen npanel = _N

. tabulate npanel
    npanel │      Freq.     Percent        Cum.
    ───────┼───────────────────────────────────
         5 │          5        0.02        0.02
        10 │     31,030       99.98      100.00
    ───────┼───────────────────────────────────
     Total │     31,035      100.00
```

Every value of _ID has data for 10 years except one. The one exception has data for only 5 years. We list it.

```
. list _ID state countyname year npanel if npanel != 10, noobs
```

_ID	state	countyname	year	npanel
400	ND	Slope County	2010	5
400	ND	Slope County	2011	5
400	ND	Slope County	2012	5
400	ND	Slope County	2013	5
400	ND	Slope County	2014	5

Evidently, in the 2010 Census, North Dakota got a new county named Slope County. If we drop it, our data will be balanced.

```
. drop if _ID == 400
(5 observations deleted)
. xtset _ID year
Panel variable: _ID (strongly balanced)
 Time variable: year, 2005 to 2014
         Delta: 1 unit
. spbalance
  (data strongly balanced)
```

There are consequences to this. We dropped a county in the years 2010–2014, and now there is a "hole" in the spatial map for 2010–2014. The county we dropped was part of a larger county before 2010. The spatial maps for this part of North Dakota do not match pre- and post-2010. We might not care about it and just go ahead with our analysis. Or, we might do more work to match up the spatial maps.

This is why spbalance always drops times. When it does that, the spatial maps are always the same for the remaining times.

Stored results

spbalance without the balance option stores the following in r():

Scalars
    r(balanced)   1 if strongly balanced, 0 otherwise

spbalance, balance stores the following in r():

Scalars
    r(balanced)   1
    r(Ndropped)   number of observations dropped
Matrices
    r(T) $1 \times$ r(Ndropped) vector of the times dropped if r(Ndropped) > 0

Also see

For suggested citations, see the FAQ on citing Stata documentation.