R basics R for Stata Users

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Outline

- Introduction
- 2 Getting started
- RStudio interface
- 4 Object-oriented language
- 6 R objects
- Basic types of data
- Advanced types of data
- 8 Help, Google and Stackoverflow
- Useful resources
- Appendix

These training sessions will offer a quick introduction to R, its amazing features and why it is so much better than Stata.

This first session will present the basic concepts you will need to use R.

The next sessions will include:

- Exporting summary statistics and regression tables (Nov 20)
- Creating awesome-looking plots (Nov 29)
- Writing reproducible and readable code (Dec 6)
- Creating awesome-looking maps (Dec 13)
- Cleaning data (Dec 20)

For the most recent versions of these trainings, visit the R-training GitHub repo at https://github.com/worldbank/dime-r-training

(currently under the 'development' branch)

Some advantages of R over Stata:

- It is less specialized:
 - More flexibility when programming.
 - Many more functionalities.
- Much broader network of users:
 - More resources online, which makes using Google a lot easier. You'll never want to see Statalist again in your life.
 - Development of new features and bug fixes happens faster.
- It is way cooler.

Some possible disadvantages of R:

- Higher cost of entry than Stata.
 - That doesn't mean that the learning curve is steeper all the way up!
- Stata is more specialized:
 - Certain common tasks are simpler in Stata.
- Stata has wider adoption among micro-econometricians.
 - Network externalities in your work environment.
 - Development of new specialized techniques and tools could happen faster (e.g. ietoolkit).

Here are some other advantages:

- R is a free and open source software!
- It allows you to have several data sets open simultaneously.
- It can run complex Geographic Information System (GIS) analyses.
- You can use it for web scrapping.
- You can run machine learning algorithms with it.
- You can create complex Markdown documents. This presentation, for example, is entirely done in RStudio.
- You can create interactive dashboards and online applications with the Shiny package.

What about Python?

- Python is even more flexible and has more users than R. So, why should I bother to learn R?
- Despite being super popular for data science, Python has fewer libraries developed for econometrics.
- Python still cannot do everything Stata does without some trouble, R can.
- R and Python are very similar, specially if your background is in Stata.

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This training requires that you have R installed in your computer:

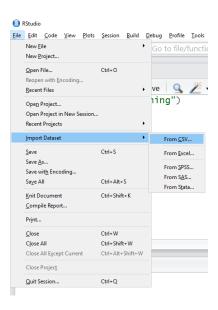
Installation

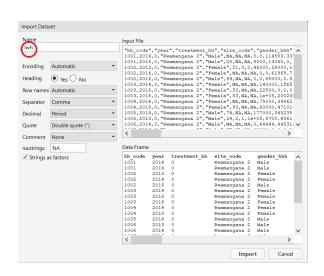
- Please visit (https://cran.r-project.org) and select a Comprehensive R Archive Network (CRAN) mirror close to you.
- If you're in the US, you can directly visit the mirror at Berkley university at (https://cran.cnr.berkeley.edu).
- we also strongly suggest installing R studio. You can get it in (https://www.rstudio.com/), but you need to install R first.

Let's start by loading the data set we'll be using:

Exercise 1: Import data

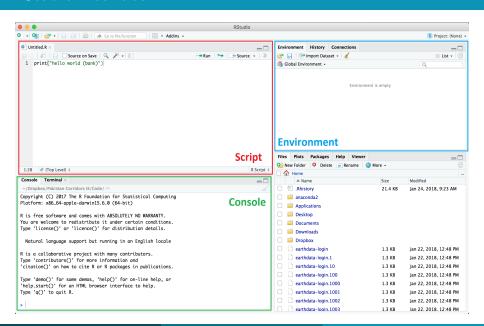
- In RStudio, go to File > Import Dataset > From Text (Base) and open the whr_panel.csv file.
 - Depending on your Rstudio version, it might be File > Import Dataset > From CSV
- The file should be in GitHub/dime-r-training/DataWork/DataSets/Final
- Ohange the name to whr on the import window

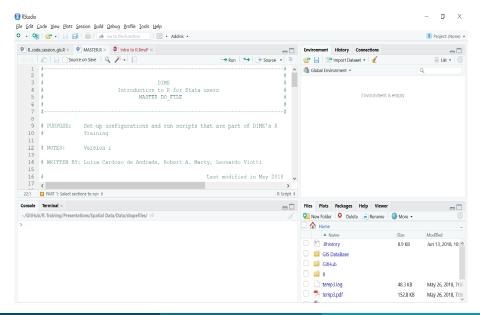




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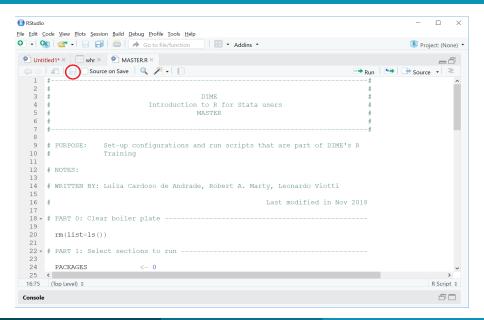




```
\neg \Box
♦ ⇒ ☐ ☐ Source on Save ☐ ☐ ▼
                                                    Run Source - =
                                   DIME
                        Introduction to R for Stata users
                              MASTER SCRIPT
 7
 8
    # PURPOSE: Set-up configurations and run scripts that are part of DIME's R
10
               Training
11
12
    # NOTES:
 13
14
    # WRITTEN BY: Luiza Cardoso de Andrade, Robert A. Marty, Leonardo Viotti
15
16
    #
                                                Last modified in May 2018
17
    # PART O: Clear boiler plate ------
18 -
 19
 20
     rm(list=ls())
 21
 22 * # PART 1. Select sections to run ------
    PART 0: Clear boiler plate $
21:1
                                                                   R Script $
```

RStudio File Edit Code View Plots Session Build Debug Profile Tools Help → Source → DIME Introduction to R for Stata users MASTER DO FILE # PURPOSE: Set-up configurations and run scripts that are part of DIME's R 10 # NOTES: Version 1 # WRITTEN BY: Luiza Cardoso de Andrade, Robert A. Marty, Leonardo Viotti 16 Last modified in May 2018 - # 18 * # PART 0: Clear boiler plate -----19 20 rm(list=ls()) 21 22 - # PART 1: Select sections to run ------23 24 PACKAGES <- 0 Lab1 <- 0 26 Lab2 <- 0 Tab3 <- 0 20:16 ## PART 0: Clear boiler plate \$ R Script \$

RStudio File Edit Code View Plots Session Build Debug Profile Tools Help DIME Introduction to R for Stata users MASTER DO FILE # PURPOSE: Set-up configurations and run scripts that are part of DIME's R 10 # NOTES: Version 1 # WRITTEN BY: Luiza Cardoso de Andrade, Robert A. Marty, Leonardo Viotti 16 Last modified in May 2018 - # 18 * # PART 0: Clear boiler plate -----19 20 rm(list=ls()) 21 22 - # PART 1: Select sections to run ------23 24 PACKAGES <- 0 Lab1 <- 0 26 Lab2 <- 0 Tab3 <- 0 20:16 ## PART 0: Clear boiler plate \$ R Script \$



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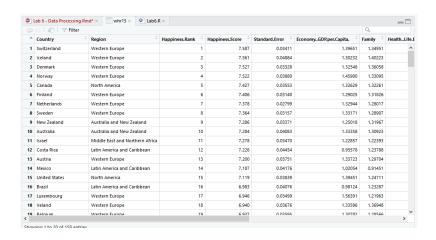
- In Stata, you can open ONE dataset, and perform operations that can change this dataset.
- You can also have other objects, such as matrices, macros and tempfiles, but they are secondary, and most functions only use the main dataset.
- If you wish to do any non-permanent changes to your data, you'll need to preserve the original data to keep it intact.
- R works in a completely different way: you can have as many datasets (objects) as you wish (or your computer's memory allows) and operations will only have lasting effects if you store them.

- Everything that exists in R's memory variables, datasets, functions is an object.
- An object is a chunk of data stored in the memory that has a name by which you call it (exactly like macros in Stata).
- If you create an object, it is going to be stored in memory until you delete it or quit R.
- Whenever you run anything you intend to use in the future, you need to store it as an object.

To better understand the idea, we're going to use the data from the United Nations' World Happiness Report. First, let's take a look at the data.

Type the following code to explore the data:

```
# We can use the function View() to browse the whole data
View(whr)
# Alternatively we can print the first 6 obs. with head()
head(whr)
```



head(whr)

```
##
         country
                         region year happy_rank happy_score
                                                              gdp pc
                                                                       family
                                                      7.537 1.616463 1.533524
## 1
          Norway Western Europe 2017
        Denmark Western Europe 2017
                                                      7.522 1.482383 1.551122
##
         Iceland Western Europe 2017
## 3
                                                      7.504 1.480633 1.610574
  4 Switzerland Western Europe 2017
                                                      7.494 1.564980 1.516912
## 5
        Finland Western Europe 2017
                                              5
                                                      7,469 1,443572 1,540247
  6 Netherlands Western Europe 2017
                                                      7.377 1.503945 1.428939
##
                freedom trust_gov_corr generosity dystopia_res
  1 0.7966665 0.6354226
                              0.3159638
                                         0.3620122
                                                       2,277027
   2 0.7925655 0.6260067
                              0.4007701
                                         0.3552805
                                                       2.313707
  3 0.8335521 0.6271626
                              0.1535266
                                         0.4755402
                                                       2.322715
## 4 0.8581313 0.6200706
                              0.3670073
                                         0.2905493
                                                       2,276716
## 5 0.8091577 0.6179509
                              0.3826115
                                         0.2454828
                                                       2.430182
## 6 0.8106961 0.5853845
                              0.2826618
                                         0.4704898
                                                       2,294804
```

Now, let's try some simple manipulations. First, assume we're only interested in data of the year 2015.

Exercise 2: Subset the data

 Subset the data set, keeping only observations where variable year equals 2015.

```
# To do that we'll use the subset() function
subset(whr, year == 2015)
```

2 Then, look again at the first 6 observations

```
# Use the head() function again
head(whr)
```

head(whr)

```
##
         country
                         region year happy_rank happy_score
                                                              gdp pc
                                                                       family
                                                      7.537 1.616463 1.533524
## 1
          Norway Western Europe 2017
        Denmark Western Europe 2017
                                                      7.522 1.482383 1.551122
##
         Iceland Western Europe 2017
## 3
                                                      7.504 1.480633 1.610574
  4 Switzerland Western Europe 2017
                                                      7.494 1.564980 1.516912
## 5
        Finland Western Europe 2017
                                              5
                                                      7,469 1,443572 1,540247
  6 Netherlands Western Europe 2017
                                                      7.377 1.503945 1.428939
##
                freedom trust_gov_corr generosity dystopia_res
  1 0.7966665 0.6354226
                              0.3159638
                                         0.3620122
                                                       2,277027
   2 0.7925655 0.6260067
                              0.4007701
                                         0.3552805
                                                       2.313707
  3 0.8335521 0.6271626
                              0.1535266
                                         0.4755402
                                                       2.322715
## 4 0.8581313 0.6200706
                              0.3670073
                                         0.2905493
                                                       2,276716
## 5 0.8091577 0.6179509
                              0.3826115
                                         0.2454828
                                                       2.430182
## 6 0.8106961 0.5853845
                              0.2826618
                                         0.4704898
                                                       2,294804
```

We can see that nothing happened to the original data. This happens because we didn't store the edit we made anywhere.

To store an object, we use the assignment operator (<-):

```
# Assign the Answer to the Ultimate Question of Life, # the Universe, and Everything x \leftarrow 42
```

From now on, x is associated with the stored value (until you replace it delete it or close R).

Exercise 3: Create an object

Create a new data set, called whr2015, that is a subset of the whr data set containing only data from the year 2015.

```
# Using the same function but now assigning it to an object
whr2015 <- subset(whr, year == 2015)

# Display the 5 first obs. of the new data
head(whr2015)</pre>
```

Notice that we still have the original data set intact
head(whr)

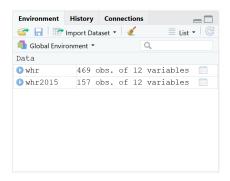
head(whr2015)

```
##
          country
                          region year happy_rank happy_score gdp_pc family
## 313 Switzerland Western Europe 2015
                                                      7.587 1.39651 1.34951
## 314
          Iceland Western Europe 2015
                                                      7.561 1.30232 1.40223
## 315
          Denmark Western Europe 2015
                                                      7.527 1.32548 1.36058
## 316
           Norway Western Europe 2015
                                                      7.522 1.45900 1.33095
## 317
           Canada North America 2015
                                               5
                                                      7,427 1,32629 1,32261
          Finland Western Europe 2015
## 318
                                                      7.406 1.29025 1.31826
##
       health freedom trust_gov_corr generosity dystopia_res
## 313 0.94143 0.66557
                             0.41978
                                        0.29678
                                                    2.51738
## 314 0.94784 0.62877
                             0.14145
                                       0.43630
                                                    2.70201
## 315 0.87464 0.64938
                             0.48357 0.34139
                                                    2.49204
## 316 0.88521 0.66973
                            0.36503
                                       0.34699
                                                    2.46531
## 317 0.90563 0.63297
                             0.32957
                                       0.45811
                                                    2.45176
## 318 0.88911 0.64169
                             0.41372
                                        0.23351
                                                    2,61955
```

head(whr)

```
##
         country
                         region year happy_rank happy_score
                                                              gdp pc
                                                                       family
                                                      7.537 1.616463 1.533524
## 1
          Norway Western Europe 2017
        Denmark Western Europe 2017
                                                      7.522 1.482383 1.551122
##
         Iceland Western Europe 2017
## 3
                                                      7.504 1.480633 1.610574
  4 Switzerland Western Europe 2017
                                                      7.494 1.564980 1.516912
## 5
        Finland Western Europe 2017
                                              5
                                                      7,469 1,443572 1,540247
  6 Netherlands Western Europe 2017
                                                      7.377 1.503945 1.428939
##
                freedom trust_gov_corr generosity dystopia_res
  1 0.7966665 0.6354226
                              0.3159638
                                         0.3620122
                                                       2,277027
   2 0.7925655 0.6260067
                              0.4007701
                                         0.3552805
                                                       2.313707
  3 0.8335521 0.6271626
                              0.1535266
                                         0.4755402
                                                       2.322715
## 4 0.8581313 0.6200706
                              0.3670073
                                         0.2905493
                                                       2,276716
## 5 0.8091577 0.6179509
                              0.3826115
                                         0.2454828
                                                       2.430182
## 6 0.8106961 0.5853845
                              0.2826618
                                         0.4704898
                                                       2,294804
```

You can also see that your environment pane now has two objects:



Two important concepts to take note:

- In R, if you want to change your data, you need to store it in an object.
- ② It is possible to simply replace the original data. This happens if you assign the new object to the same name as the original.
- Print (display) is built into R. If you execute any action without storing it, R will simply print the results of that action but won't save anything in the memory.

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R objects

Objects are the building blocks of R programming. T his section will explore some of the most common.

This will give you the foundation to explore your data and construct analytical outputs.

Here are the types of object we will cover today:

- Vectors: an uni-dimensional object that stores a sequence of values
- Data frames: a combination of different vectors of the same length (the same as your data set in Stata)
- **Lists:** a multidimensional object that can store several objects of different dimension

Vectors

A vector is an uni-dimensional object composed by one or more scalars of the same type.

Use the following code to create vectors in two different ways

```
# Creating a vector with the c() function
v1 <- c(1,1,2,3,5)</pre>
```

Alternative way to create an evenly spaced vector v2 <- 1:5

You can use brackets for indexing

```
# Print the 4th element of the vector
v2[4]
```

[1] 4

Vectors

To R, each of the columns of whr is a vector.

Calling a vector from a data.frame column

We use the \$ to call vectors (variables) by their names in a data.frame

Type the following code:

```
# Create a vector with the values of the `year` variable
year_vec <- whr$year</pre>
```

```
# See the 3 first elements of the year column whr$year[1:3]
```

[1] 2017 2017 2017

Data Frames

The whr and whr2015 objects are both data frames. You can also construct a new data frame from scratch by combining vectors with the same number of elements .

```
Now, type the following code to create a new data frame
```

Dataframe created by biding vectors

```
df1 <- data.frame(v1,v2)
df1

## v1 v2
## 1 1 1
## 2 1 2
## 3 2 3
## 4 3 4
## 5 5 5
```

Data Frames

Since a data frame has two dimensions, you can use indexing on both:

Numeric indexing

```
# The first column of whr
whr[,1]

# The 45th line of whr
whr[45,]

# Or the 45th element of the first line
whr[45,1]
```

R objects Data Frames

Alternatively, you can use the column names for indexing, which is the same as using the \$ sign.

```
Names indexing
# Or the 22th element of the country column
whr[22,"country"] # The same as whr$country[22]
## [1] Brazil
## 164 Levels: Afghanistan Albania Algeria Angola Argentina
```

Data Frames

Lists are more complex objects that can contain many objects of different classes and dimensions.

Lists are fancy and can have a lot of functionalities and attributes. They are the output of many functions and are used to construct complex objects.

It would be beyond the scope of this introduction to go deep into them, but here's a quick example

Combine several objects of different types in a list

```
# Use the list() function
lst <- list(v1, df1, 45)</pre>
```

Print the list yourself to see how it looks like.

v1 v2 1 1

3 2 3 ## 4 3 4 ## 5 5 5 ## ## [[3]] ## [1] 45

Lists

```
# Check the contents of lst
print(lst)

## [[1]]
## [1] 1 1 2 3 5
##
## [[2]]
```

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Basic types of data

R has different kinds of data that can be recorded inside objects. They are very similar to what you have in Stata, and the main types are string, integer, numeric, factor and boolean.

Let's start with the simpler ones:

Strings

A sequence of characters and are usually represented between double quotes. They can contain single letters, words, phrases or even some longer text.

Integer and numeric

As in Stata, these are two different ways to store numbers. They are different because they use memory differently. As default, R stores numbers in the numeric format (double).

Basic types of data

Strings

Now we'll use string data to practice some basic object manipulations in R.

Exercise 4: Create a vector of strings

Create two string vector containing the names of commonly used statistical software in order of importance:

Now print them to check them out.

Basic types of data

Strings

Exercise 5: Concatenate strings

- Create a scalar (a vector of one element) containing the phrase "is better than" and cal it str_scalar.
- ② Use the function paste() with 3 arguments separated by commas:
 - The first argument as the 1st element of str_vec.
 - The second argument as the str_scalar.
 - The third argument as the 5th element of str_vec.
- If you're not sure where to start, type:

help(paste)

Basic types of data Strings

```
### Using the paste function to combine strings

# Scalar
str_scalar <- "is better than"

# Using the paste() function
paste(str_vec[1], str_scalar, str_vec[5])</pre>
```

[1] "R is better than Stata"

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R also has other more complex ways of storing data. These are the most used:

Factors

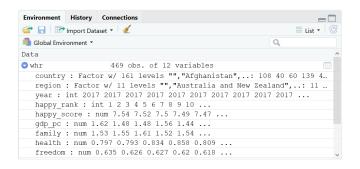
Factors are numeric categorical values with text label, equivalent to labelled variables in Stata. Turning strings into factors makes it easier to run different analyses on them and also uses less space in your memory.

Booleans

Booleans are logical binary variables, accepting either TRUE or FALSE as values. They are automatically generated when performing logical operations

Factors

In whr, we can see that country and region are factor variables. In your environment panel, there is the information of the type of all variables, and for factors the number of levels.



Factors

We'll learn how to deal with factors in detail on the next session, since they are very important for us. For now, here are two important things to keep in mind when using them:

Warning:

Unlike Stata, in R

- You use the labels to refer to factors
- You cannot choose the underlying values

Booleans

Boolean data is the result of logical conditions

- Whenever you're using an if statement in Stata, you're implicitly using boolean data.
- The difference is that in R, this can be done in 2 steps.

Booleans

Exercise 6:

Create boolean vector with the condition of annual income below average:

Booleans

Let's use the boolean vector created to add a dummy variable in the whr data set for the same condition.

Exercise 6:

• Create a column in whr containing zeros and call it rank_low. You can do this by typing:

② Use bool_vec to index the lines of the income_low column and replace all observations that meet the condition with the value 1.

```
whr$rank_low[bool_vec] <- 1</pre>
```

Booleans

```
# Replace with 1 those obs that meet the condition
whr$rank low [bool vec] <- 1
# is the same as
whr$rank_low[whr$happy_rank < mean(whr$happy_rank)] <- 1</pre>
# This in stata would be
\# replace rank_low = 1 if (...)
# We can use the summary function to get descriptives
summary(whr$rank_low)
```

```
## Min. 1st Qu. Median Mean 3rd Qu. Max.
## 0.0000 0.0000 0.0000 0.4979 1.0000 1.0000
```

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Help, Google and Stackoverflow

Help in R works very much like in Stata: the help files usually start with a brief description of the function, explain its syntax and arguments and list a few examples. There are two ways to access help files:

```
Exercise 7: Use help
```

```
# The help() function
help(summary)
# and its abbreviation
?summary
```

Help, Google and Stackoverflow

- The biggest difference, however, is that R has a much wider user community and it has a lot more online resources.
- For instance, in 2014, Stata had 11 dedicated blogs written by users, while R had 550.¹
- The most powerful problem-solving tool in R, however, is Google.
 Searching the something yields tons of results.
- Often that means a Stack Overflow page where someone asked the same question and several people gave different answers. Here's a typical example: https://stackoverflow.com/questions/1660124/ how-to-sum-a-variable-by-group

¹Check http://r4stats.com/articles/popularity/ for more.

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Useful resources

Blogs and online courses:

- Surviving graduate econometrics with R: https://thetarzan.wordpress.com/2011/05/24/ surviving-graduate-econometrics-with-r-the-basics-1-of-8/
- An Introduction to R at https://cran.r-project.org/
- R programming in Coursera: https://www.coursera.org/learn/r-programming
- Try R in Code School: http://tryr.codeschool.com/
- R programming for dummies: http://www.dummies.com/programming/r/
- R bloggers: https://www.r-bloggers.com/
- R statistics blog: https://www.r-statistics.com/
- The R graph gallery: https://www.r-graph-gallery.com/

Useful resources

Books:

- R for Stata Users Robert A. Muenchen and Joseph Hilbe
- R Graphics Cookbook Winston Chang
- R for Data Science Hadley Wickha and Garrett Grolemund

Thank you!

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Appendix - Syntax

R's syntax is a bit heavier than Stata's:

- Parentheses to separate function names from its arguments.
- Commas to separate arguments.
- For comments we use the # sign.
- You can have line breaks inside function statements.
- In R, functions can be treated much like any other object Therefore, they can be passed as arguments to other functions.

Similarly to Stata:

- Square brackets are used for indexing.
- Curly braces are used for loops and if statements.
- Largely ignores white spaces.

Appendix - RStudio interface

Script

Where you write your code. Just like a do file.

Console

Where your results and messages will be displayed. But you can also type commands directly into the console, as in Stata.

Environment

What's in R's memory.

The 4th pane

Can display different things, including plots you create, packages loaded and help files.

Appendix - Matrices

A matrix a bi-dimensional object composed by one or more vectors of the same type.

```
Type the following code to test two different ways of creating matrices
```

```
# Matrix created by joining two vectors:
m1 <- cbind(v1,v1)

# Matrix using the
m2 <- matrix(c(1,1,2,3,5,8), ncol = 2)</pre>
```

Appendix - Matrices

Now use the following code to check the elements of these matrices by indexing

```
# Matrix indexing: typing matrix[i,j] will give you
# the element in the ith row and jth column of that matrix
#m2[1,2]
# Matrix indexing: typing matrix[i,] will give you the
# ith row of that matrix
m1 \lceil 1 \rceil
# Matrix indexing: typing matrix[,j] will give you the
# jth column of that matrix (as a vector)
m1[,2]
```

Appendix - Advanced types of data - Factors

Create a factor verctor using the following code

```
# Basic factor vector
num_vec <- c(1,2,2,3,1,2,3,3,1,2,3,3,1)
fac_vec <- factor(num_vec)

# A bit fancier factor vector
fac_vec <- factor(num_vec,labels=c("A","B","C"))

# Change labels
levels(fac_vec) = c('One','Two','Three')</pre>
```

Factors

Appendix - Numbers and integers

Two scalars, one with a round number the other with a fractional part

```
# a numeric scalar with an integer number
int <- 13
num <- 12.99</pre>
```

Appendix - Numbers and integers

Now we can see the objects classes with the <code>class()</code> function and test it with the <code>is.integer()</code> and <code>is.numeric()</code> functions.

```
# you can see the number's format using the class function:
class(int)
## [1] "numeric"
class(num)
## [1] "numeric"
# you can test the class with the is. method
```

[1] FALSE

is.integer(int)

Appendix - Numbers and integers

Numbers and integers

We can, however, coerce objects into different classes. We just need to be careful because the result might not be what we're expecting.

```
Use the as.integer() and round() functions on the num object to see
the difference:
as.integer(num)
## [1] 12
# a.n.d.
round(num)
## [1] 13
```