Lecture 2 - Introduction to the tidyverse and data importing

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The tidyverse or how modern R code is being written

### Tidy data

Tidying your data means storing it in a consistent form that matches the semantics of the dataset with how it is stored (Wickham et al, 2023)

- Tidy data is a standard way of mapping the meaning of a dataset to its structure.
- A dataset is messy or tidy depending on how rows, columns, and tables are matched up with observations, variables, and types.
- In tidy data:
  - Each variable forms a column.
  - Each observation forms a row.
  - Each type of observational unit forms a table.

### Who came up with this?

- Hadley Wickham introduced the concept of tidy data in his paper "Tidy Data" published in the Journal of Statistical Software in 2014.
- In the R for Data Science book (R4DS), the tidyverse is introduced as a collection of R packages designed to tidy data and work with it in a data science context.
- The tidyverse philosophy revolutionized the way R code is written and data is handled, making it more efficient and easier to understand.

### The data science vs. the research perspective

- According to Hadley Wickham, data science is an exciting discipline that allows you to transform raw data into understanding, insight, and knowledge.
- This means we need not be afraid that the tidyverse will make us lose the ability to do research.
  - In this view, data science is not only predictive modeling.

### The tidyverse steps in a data science project

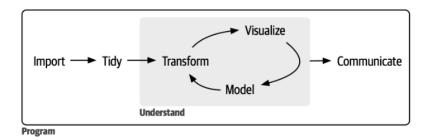


Figure 1: Tidy steps in Data

Source: R for Data Science by Wickham, Cetinkanya-Rundel & Grolemund (2023)

### The tidyverse steps in a research project

- **1 Import**: read data from a file or database.
- Tidy: transform the data into a format that makes it easy to work with.
- Transform: perform operations on the data to create new variables or summaries.

(together, transform and tidy are often referred to as wrangling - it feels like a wrestling match sometimes!)

- Visualize: generate static graphics for exploratory data analysis.
- **Model**: fit quantitative models to understand relationships between variables, complementary to visualization.
- **Communicate**: generate reports or dashboards, or create a Shiny app. The most important step!

### Where does programming fit in?

- Programming is an outer step in the process as it will be used all along the way.
- We use programming to automate the steps in the process and solve problems effectively.

### The tidyverse packages

- The tidyverse is a collection of R packages that share an underlying design philosophy, grammar, and data structures.
- The packages in the tidyverse are designed to work together, and it is easier to learn them together.

### The core tidyverse packages

■ **ggplot2**: for data visualization.

■ dplyr: for data manipulation.

■ tidyr: for data tidying.

■ readr: for data import.

**purrr**: for functional programming.

■ tibble: for tibbles, a modern reimagining of data frames.

**stringr**: for strings.

■ forcats: for factors.

### Installing the tidyverse

■ We install them all at once through the tidyverse package, which is a meta-package that installs the core tidyverse packages.

install.packages("tidyverse")

# Importing data

- The readr package is part of the tidyverse and provides a fast and friendly way to read rectangular data.
  - "Rectangular data" is data that is organized into rows and columns.
  - This is data that appears in a data.frame in R, and stored in .csv, .tsv. or .txt files.
  - Other types of data, like spatial data, are not rectangular and are not handled by readr.
- The base R read.csv() function is also used to read data, but readr is faster, more user-friendly, and offers a greater range of possibilities for data loading.

#### The Ecuadorian used cars dataset

- Kaggle is a platform for data science competitions and datasets.
- The dataset we will use for loading is the Ecuadorian used cars dataset.
- The dataset contains information about used cars in Ecuador, such as the brand, model, year, price, and more
  - It was obtained by scraping the patiotuerca.com website.

- RStudio has a built-in feature to import data from a file.
- You can click on the "Import Dataset" button in the Environment pane and select the file you want to import.
  - Loads different types of files, such as .csv, .tsv, .txt, .xlsx, and more, based on different packages
  - Loads the data into your environment as a data.frame, and generates the code to do so.
- Recommended for beginners as they learn the syntax for the readr package.

## Importing data with the Import button in RStudio

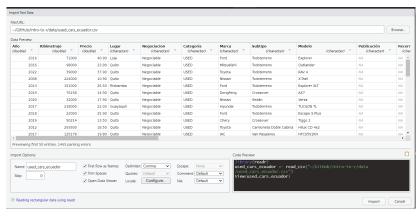


Figure 2: Import data in RStudio

### Steps after importing data

- After importing the data, you should:
  - Check the structure of the data with str().
  - Check the first few rows of the data with head().
  - Check the last few rows of the data with tail().
  - Check the summary of the data with summary().
- A tidyverse function, loaded from the dplyr package, is glimpse(), which provides a more detailed view of the data.
- Further, using janitor::clean\_names() will clean the column names.
  - This is a function from the janitor package, which is not part of the tidyverse but is useful for cleaning data.
  - Spanish names often have accents, which can be problematic for programming and technically invalid.
- Not using clean\_names() would require the use of the apostrophe to refer to the columns.

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### Reading Microsoft Excel files

- Plenty of packages deal with Excel files in R, but the readxl package is part of the tidyverse and is the recommended package for reading Excel files.
  - Alternatives are the openxlsx and writexl packages.
- The readxl package is fast and user-friendly, and it can read .xls and .xlsx files.
- The readxl package has two main functions: read\_excel() and excel\_sheets().

- The read\_excel() function reads an Excel file and returns a tibble or a data.frame.
- Will also work with the import button in RStudio.
- Might need to pre-clean the loaded data by skipping columns, rows, or specifying the range of cells to read.

- The SUPERCIAS Companies Directory is a dataset that contains information about companies registered in Ecuador.
- Requires skipping the first 4 rows.

```
library(readxl)
library(dplyr)
# Read the Excel file
supercias <-
    read excel("data/directorio companias supercias.xlsx",
                skip = 4)
```

### Reading other types of files

- The readr package has a set of functions that are used to read different types of files:
  - read csv(): reads comma-separated files.
  - read\_tsv(): reads tab-separated files.
  - read\_delim(): reads in files with a custom delimiter (common for .csv files with; delimiters)
  - read fwf(): reads in fixed-width files.
  - read\_table(): reads in files with a custom column separator.
- For data coming from statistical software, the haven package is a tidyverse package that reads in .dta, .sav, and .sas files.
  - SPSS files might come in .sav or .por formats.
  - SAS files might come in .sas7bdat or .xpt formats.
  - Stata files might come in .dta format.
- More complex files, like JSON, XML, and HTML, can be read in with the isonlite, xml2, and rvest packages, respectively.

Tidyverse fundamentals: tibbles and dplyr

#### The tibble: a modern data frame

- The tibble is a modern reimagining of the data.frame in R.
- It is part of the tidyverse and is used to store rectangular data.
- It is more user friendly, as when you print a tibble, it only shows the first 10 rows and the columns that fit on the screen.
- Other differences are that tibble does not convert strings to factors by default, and it does not use row names.

#### The tibble: a modern data frame

- We can transform a data frame into a tibble with the as\_tibble() function.
- The tibble package is part of the tidyverse, so you do not need to install it separately if you've installed it.

#### dplyr: plying data into shape with the tidyverse

- The dplyr could be considered as the most important package in the tidyverse, used for the transform part of the tidy process.
- Provides a set of functions that perform common data manipulation operations such as filtering, selecting, mutating, summarizing, and arranging.
- dplyr brings with itself a grammar of data manipulation and a modern, different coding style based on the pipe operator %>% and tidyverse verbs.

#### The dplyr verbs or functions

#### Among others:

- filter(): to filter rows based on a condition.
- select(): to select columns.
- mutate(): to create new columns.
- arrange(): to reorder rows.
- summarize(): to summarize data.
- group\_by(): to group data.
- distinct(): to select distinct rows.
- rename(): to rename columns.

#### The dplyr verbs or functions

- These are called "verbs" because they are functions that perform actions on a dataset.
- All follow the same general syntax:

verb(data, arguments)

where data is a data frame or tibble, and arguments are the arguments that the function takes.

### Selecting columns with select()

- The select() function is used to select columns from a data frame.
- In base R, you would use the \$ operator to select columns or indexing with the [ ] operator.
- The select() function is more flexible and allows you to select columns based on their names or positions.

```
library(dplyr)
# Select columns from the cars dataset
select(cars, Precio, Lugar, Negociacion)
```

```
A tibble: 9.021 x 3
  Precio Lugar
                   Negociacion
   <dbl> <chr>
                   <chr>
    40.9 Loja
1
                   Negociable
    23.9 Quito
                   Negociable
3
    37.9 Quito
                   Negociable
4
    10.9 Quito
                   Negociable
5
    26.5 Riobamba
                   Negociable
6
    14.9 Quito
                   Negociable
    17.9 Quito
                   Negociable
8
    22
         Guayaquil Negociable
9
    25.9 Quito
                   Negociable
```

### Selecting columns with select()

- You may also use the operator to exclude columns.
- The tidyselect() helper functions can be used to select columns based on patterns.
  - starts\_with()
  - ends\_with()
  - contains()

#### Filtering rows with filter()

- The filter() function is used to filter rows based on a logical condition.
- In base R, you would use the [ ] operator to filter rows, or subset()
- The filter() function is more flexible and allows you to filter rows based on multiple conditions.
  - Multiple conditions go within the same filter() function, separated by commas.
  - These would be combined as an AND'&' (all conditions must be met) logical operator.

### The used cars example

```
# Filter rows from the cars dataset
filter(cars, Marca == "Chevrolet", Precio < 10000)</pre>
```

# A tibble: 1,771 x 26

```
Año Kilómetraje Precio Lugar Negociacion Categoría Marca
                <dbl>
   <dbl>
                       <dbl> <chr> <chr>
                                                 <chr>>
                                                            <chr>>
    2014
               118000
                        14.8 Quito Negociable
                                                 USED
                                                            Chevrole
2
    2020
                98000
                        12.4 Quito Negociable
                                                 USED
                                                            Chevrole
3
                27000
    2019
                         8.9 Quito Negociable
                                                 USED
                                                            Chevrole
4
    2019
                27000
                         8.9 Quito Negociable
                                                 USED
                                                            Chevrole
5
    2022
                 9400
                        16.9 Quito Negociable
                                                 USED
                                                            Chevrole
6
    2016
                 9000
                              Quito Negociable
                                                 USED
                                                            Chevrole
7
                        17.9 Quito Negociable
    2009
               296000
                                                 USED
                                                            Chevrole
8
    2013
               173000
                        18.9 Quito Negociable
                                                 USED
                                                            Chevrole
9
    2015
               235621
                        10.9 Quito Fijo
                                                 USED
                                                            Chevrole
10
    2012
               170000
                         9.9 Quito Fijo
                                                            Chevrole
                                                 USED
```

### The pipe operator %>%

- The pipe operator %>% is used to chain operations together.
  - Takes the output of the operation on the left and passes it as the first argument to the operation on the right.
- Initially introduced in the magrittr<sup>1</sup> package, which introduced programming operators.



Figure 3: The Magrittr Hex Logo

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<sup>&</sup>lt;sup>1</sup>The magrittr package is named after the Belgian surrealist artist René Magritte. The original painting is called "The Treachery of Images" and features a pipe with the

■ Think of it as an operator which facilitates the flow of composite functions in algebra.

$$f(x) = g(h(x))$$

■ The pipe operator allows you to write this as:

### The pipe operator %>%

■ As an example, consider the following code:

```
filtered_data <- filter(cars, Marca == "Chevrolet", Precio < 100
selected_data <- select(filtered_data, Precio, Marca)
selected_data</pre>
```

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### The pipe operator %>%

■ This can even be done with functions that are not part of the tidyverse.

```
cars %>%
   janitor::clean_names() %>%
   filter(marca == "Chevrolet", precio < 10000) %>%
   select(ano, precio, lugar)
```

### The pipe operator %>%

- The pipe operator is very useful for making code more readable and easier to follow.
- It is also useful for debugging, as you can see the output of each step in the chain.
  - "Debugging" means finding and fixing problems in your code.
  - When you don't pipe, you need to store the output of each step in a separate object, which can be cumbersome.
- All of the tidyverse packages are designed to be pipeable, even those not part of the core tidyverse!

#### Renaming columns with rename()

- The rename() function is used to rename columns in a data frame.
- In base R, you would use the names() function to rename columns.
- The rename() function is more flexible and allows you to rename columns based on their names.

#### The used cars example

```
# Rename columns in the cars dataset
cars %>%
    janitor::clean names() %>%
    rename(price = precio)
```

```
# A +ibbla: 9 021 v 26
```

A CIDDI	10. 0,021 A 2	20				,
ano	kilometraje	price	lugar	negociacion	categoria	marca
<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<chr></chr>	<chr></chr>	<chr></chr>	<chr></chr>
2016	71000	40.9	Loja	Negociable	USED	Ford
2016	98000	23.9	Quito	Negociable	USED	Mitsu
2022	39000	37.9	Quito	Negociable	USED	Toyot
2008	224000	10.9	Quito	Negociable	USED	Nissa
2013	151000	26.5	Riobamba	Negociable	USED	Ford
2019	76158	14.9	Quito	Negociable	USED	DongF
2020	32000	17.9	Quito	Negociable	USED	Nissa
2017	218000	22	Guayaquil	Negociable	USED	Hyund
2018	22000	25.9	Quito	Negociable	USED	Ford
	ano <dbl> 2016 2016 2022 2008 2013 2019 2020 2017</dbl>	ano kilometraje <dbl> <dbl> <dbl> 2016 71000 2016 98000 2022 39000 2008 224000 2013 151000 2019 76158 2020 32000 2017 218000</dbl></dbl></dbl>	<dbl><dbl><dbl><dbl><dbl></dbl>         2016       71000       40.9         2016       98000       23.9         2022       39000       37.9         2008       224000       10.9         2013       151000       26.5         2019       76158       14.9         2020       32000       17.9         2017       218000       22</dbl></dbl></dbl></dbl>	ano kilometraje price lugar <dbl></dbl>	ano         kilometraje         price         lugar         negociacion <db1> <db1><db1><dchr> <chr> <chr>         2016         71000         40.9         Loja         Negociable           2016         98000         23.9         Quito         Negociable           2022         39000         37.9         Quito         Negociable           2008         224000         10.9         Quito         Negociable           2013         151000         26.5         Riobamba         Negociable           2019         76158         14.9         Quito         Negociable           2020         32000         17.9         Quito         Negociable           2017         218000         22         Guayaquil         Negociable</chr></chr></dchr></db1></db1></db1>	ano         kilometraje         price         lugar         negociacion         categoria <db1> <db1><db1> <chr> <chr> <chr> <chr> <chr> <chr> <chr> <th< td=""></th<></chr></chr></chr></chr></chr></chr></chr></db1></db1></db1>

#### Mutating columns with mutate()

- The mutate() function is used to create new columns in a data frame.
- In base R, you would use the \$ operator to create new columns, based on them being a new column or a transformation of an existing column.

#### The used cars example

```
<chr
   2016
               71000
                        40.9 Loja
                                         Negociable
                                                      USED
                                                                 Ford
                                                      USED
   2016
               98000
                        23.9 Quito
                                         Negociable
                                                                 Mits
3
   2022
               39000
                        37.9 Quito
                                         Negociable
                                                      USED
                                                                 Toyo
   2008
              224000
                        10.9 Quito
4
                                         Negociable
                                                      USED
                                                                 Niss
5
   2013
              151000
                        26.5 Riobamba
                                         Negociable
                                                      USED
                                                                 Ford
6
   2019
               76158
                        14.9 Quito
                                         Negociable
                                                      USED
                                                                 Dong
   2020
               32000
                        17.9 Quito
                                         Negociable
                                                      USED
                                                                 Niss
8
   2017
              218000
                        22
                             Guayaquil
                                        Negociable
                                                      USED
                                                                 Hyun
```

#### Transmuting

- The transmute() function is used to create new columns and drop the old ones.
- It is a combination of mutate(), followed by select() and is useful when you want to create new columns and drop the old ones.

#### The used cars example

```
# A tibble: 9,021 x 3
    anio precio precio_round
   <dbl> <dbl>
                       <dbl>
   2016
         40.9
                        40.9
 2
   2016 23.9
                        23.9
                        37.9
   2022 37.9
 4
   2008
         10.9
                        10.9
 5
   2013
           26.5
                        26.5
    2019
           14.9
                        14.9
```

#### Arrange rows with arrange()

- The arrange() function is used to reorder rows in a data frame.
- In base R, you would use the order() function to reorder rows.
- The arrange() function is more flexible and allows you to reorder rows based on multiple columns.
- By default, arrange() arranges rows in ascending order.
  - Use the desc() function to arrange rows in descending order.
  - Not pipeable, so must be the last function in the chain.

#### The used cars example

```
# Arrange rows in the cars dataset

cars %>%
    janitor::clean_names() %>%
    arrange(precio)

# In descending order:

cars %>%
    janitor::clean_names() %>%
    arrange(desc(precio))
```

## More on pipes

- The pipe operator %>% is often called the "magrittr" pipe, named after the magrittr package that introduced it.
  - Now, it comes with the dplyr package.
- There are other types of pipes in programming languages which are used for different purposes.
  - The "forward pipe" %>% is used to pass the output of one function as the first argument of the next function.
  - The "assignment pipe" %<>% is used to pass the output of one function as the first argument of the next function, but also modifies the original input object.
  - Other advanced pipes are the "tee pipe" %T>% and the "exposition pipe" %\$%.
- We typically can remain with the forward pipe %>% for most of our work.

- The native pipe operator |> was introduced in R 4.1.0 (recent).
- It remains largely the same as the magrittr pipe %>%.
  - Differences emerge in the advanced use of the pipe, such as when using the . placeholder.
  - Hadley discusses differences and provides recommendations in this article
- The second edition of R4DS, which we are following, has now been updated to use the native pipe.
  - Hadley claims that as beginner users of the pipe, you will be unaffected by the "change".
  - The native pipe won't require you to load dplyr to use it.
  - You may turn on the native pipe in RStudio options.

#### So, will you choose to listen to Hadley?



Figure 4: Hadley

# Tidyverse style

#### Tidvverse vs. base R - some brief comments

- The tidyverse often follows a certain style of programming that is different from base R.
- The tidyverse is typically easier to learn, but it is not the only way to write R code.
- Further, tidyverse code is often more readable and easier to understand than base R code.
  - The use of the pipe operator %>% makes the code more readable and easier to follow (i.e. more expressive)

#### Tidyverse style

- The tidyverse style is based on the following principles:
  - Use the pipe operator %>% to chain operations together.
  - Use the tidyverse functions for data manipulation.
  - Use the tibble data structure instead of the data.frame.
- In terms of how to work with tidyverse functions, typically we'll find the following:
  - The first argument is a data frame or tibble (i.e. functions are "pipeable").
  - Functions will use underscores to separate words rather than points (which is the base R style).

#### Writing code tidyverse style

- The tidyverse style guide<sup>2</sup> introduces a set of conventions for writing R code in the tidyverse style.
  - "Code linters" like lintr can be used to check your code against the style guide.
  - Install the styler package to automatically format your code according to the style guide, with a built-in RStudio GUI.
- Use only valid names: lowercase, underscore for spacing, no dots, no spaces, no special characters.

```
# Good
this_is_a_good_name <- 10
# Bad
this.is.a.bad.name <- 10</pre>
```

<sup>&</sup>lt;sup>2</sup>A helpful summary can be found in R4DS

#### Writing code tidyverse style

- Use spaces to make code more readable! Put spaces on either side of mathematical operators apart from ^ (i.e. +, -, ==, <, etc.), and around the assignment operator (<-).</p>
  - No spaces close to parentheses
  - Ok to add spaces to help with function alignment (generally we like to align the arguments of a function call).

```
# Good

x <- 10 + 5

# Bad

x<-10+5
```

#### Writing code tidyverse style

- 3 Pipes should always have a space before it and should typically be the last thing on a line.
  - If the function you're piping into has named arguments, each of these arguments should be on a new line.
  - Indentation is used to make the code more readable.
  - For short piping workflows, it is ok to put everything on one line (i.e. exceptions to rules apply if they make sense).

```
# Good
cars %>%
    filter(marca == "Chevrolet") %>%
    select(precio, lugar) %>%
    filter(precio < 10000,
           lugar == "Quito") %>%
    mutate(precio round = round(precio, 2),
           precio_log = log(precio))
```

# ■ Base R data manipulation, even though it is not as user-friendly, is

- still very powerful and used frequently by R developers (as opposed to "applied" users).
- This is because the tidyverse, while very human-readable, can be a bit cumbersome for production code.
  - There is often a trade-off between readability and efficiency.
- Another reason is that tidyverse code often undergoes a lot of "behind-the-scenes" work to make it more readable.
  - This might make it inefficient for some environments.
  - However, some solutions have been proposed (see the poorman package).

- Further, tidyverse functions are less stable than base R functions, which have been around for a long time.
  - There are many updates which are not always backwards-compatible.
  - For developers, this can be a problem, so sticking to base R might be a good idea.
- dplyr is not the fastest package for data manipulation.
  - Base R isn't either: Hadley suggests taking a look at data.table for faster data manipulation (though syntax isn't friendly).
  - Other options such as bigmemory, ff, fst, tidypolars are also available
- In conclusion: the tidyverse is great and fit for many purposes! But as everything, not for all.

More on data importing

- The readr package can read data from the web using the read csv() function.
- For instance, we may read the used cars dataset from our GitHub repository using the public csv raw link.

```
# Load the cars dataset from the web
cars web <-
   read_csv("https://raw.githubusercontent.com/laboratoriolide/
```

■ The same applies for other read\_\*() functions in the readr package.

#### World Bank data

- We may use the wbstats package to load data from the World Bank API.
- The wbstats package provides a set of functions to search, download, and visualize data from the World Bank API.
  - Use wb\_search() to search for indicators.
  - Will need the indicator\_id to download the data.

#### Example: World Development Indicators

```
library(wbstats)
# Vector of indicators
indicators <- c(
  'inv_gdp'= 'NE.GDI.FTOT.ZS', # Gross fixed capital formation
  'gdp_pc' = 'NY.GDP.PCAP.KD', # GDP per capita (constant 2010 U
  'gdp g'= 'NY.GDP.PCAP.KD.ZG', # GDP per capita growth (annual
  'enrolment' = 'SE.PRM.ENRR' # Gross primary school enrolment
# Download the data with the wbstats package
wb data <- wb data(indicator = indicators)</pre>
```

#### Downloading files from the web

- The download.file() function can be used to download files from the web
- The download.file() function takes two arguments: the URL of the file and the path where you want to save the file.
- The unzip() function can be used to unzip files.

#### Packages to access data

- Many other packages allow you to access data from the web, such as:
  - rvest: for web scraping.
    - statcanR and cansim: for accessing Statistics Canada data.
    - WDI: for accessing World Bank data, exclusively World Development Indicators.
    - rgovcan: for accessing open data from the Government of Canada.
    - tidycensus: for accessing US Census data<sup>3</sup>

<sup>&</sup>lt;sup>3</sup>There is plenty on accessing US Census data. See this book and this webpage for more.

#### Packages to access data

- Can directly access data in CRAN packages too.
  - Stored data in CRAN packages can be accessed with the data() function.
  - The datasets package contains many datasets that are useful for learning R.
  - The nycflights13 package contains information about all flights departing from New York City in 2013.
  - The wooldridge package contains datasets from the Wooldridge Econometrics textbook.

#### **APIs**

- Application Programming Interfaces (APIs) are a set of rules and protocols that allow one software application to interact with another.
- APIs are used to access data from the web, and many organizations provide APIs to access their data.
- While working with APIs is a programming skill in and of itself, there are many R packages that make it easier to work with APIs.
  - The httr package is a low-level package for working with web APIs.
  - The jsonlite package is used to work with JSON data, which is a common data format used by APIs.
  - spotifyr is a package that allows you to access data from the Spotify API for music charts.
  - lastfmR is a package that allows you to access data from the Last.fm API (though not available on CRAN).
  - geniusR is a package that allows you to access data from the Genius API for music lyrics.