## Introduction to R

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# My goals

#### To convince you that:

- R is widely used for a reason and a powerful asset to you in this field
- R is incredibly flexible and not so difficult to learn
- You can do just about anything in R that you can in other programming languages/statistical software (with some limitations)
- For early-stage data cleaning/manipulation, R is incredibly useful
- It can be a powerful tool for automating mundane tasks
- R is worth continuing to learn after we're done here

#### Some caveats

- Time
- Learning curve/limitations of teaching programming in a classroom setting

Tons of resources for continuing to master this after we're done here

# (Rough) Plan for this course

#### Today

- Learn what R is and the basics/idiosyncrasies of the language
- Become familiar with the primary data types (objects) and how to work with them
- Using libraries/packages
- The basics of data I/O, plotting, and modeling

#### Beyond

- Conditionals and control flow
- The basics of loops and user-defined functions
- Some useful functions/tips/tricks for automation
- Data cleaning and manipulation
- dplyr (and other bits from the Tidyverse)
- Some more advanced plotting in ggplot
- Working through an extended example

If I'm going too slow or too fast, tell me

## What is R?

#### R is an Open Source Statistical Package

- As an open source package, code is free for anyone to view, use, or modify
- Since no one owns it, no one can profit from it
- Means that, since there is a communal effort and communal ownership, it's free
- Designed by statisticians, for statisticians

#### R (along with Python) is fairly ubiquitous in this field

- Moving toward the industry standard for this work
- Incredibly flexible
- Extensive documentation
- A vibrant online community for support and resources
  - stack overflow
  - CRAN

### **RStudio**

RStudio is an integrated development environment (IDE) that builds on base R

- More intuitive/user-friendly than base R
- Makes it much easier to see what you're doing
- Has support for Git, R Markdown, local job management, and more

#### Your window

- Script (upper-left)
- Console (bottom-left)
- Data overview/Environment (top-right)
- Multifunction (bottom-right)

### R Basics

R can function, at its most basic level, as a calculator

• Simple arithmetic operations (e.g. +, -, \*, /, ^,.)

```
3+5
```

```
## [1] 8
```

Somewhat more advanced operations (e.g. logs, trigonometric operations,.)

```
log(27)
```

```
## [1] 3.295837
```

### R Basics

Variable assignment with either <- or =

```
x <- 4*8
```

```
## [1] 32
```

Some notes on style

- Spacing
  - Leave space between operands
- Naming variables
  - Using names like "data1", "data2", "myData", "dframe", "df", etc. is bad and only bad people do it
- Commenting
  - Well commented code can save you literally hours of work

# Data types in R

R is vectorized and, loosely speaking functional

- Much like MATLAB, R is a vectorized language, which adds a tremendous amount of power
- We can think of everything in terms of vectors and matrices
  - No scalars!
  - Operations are vectorized as well

Most common data types (or objects) include:

- Vectors
- Matrices
- Data Frames
- Lists

We operate primarily by applying functions to objects that achieve a specific outcome, rather than relying on the attributes and methods those objects 'have'

### Most everything in R is built from vectors

```
# Create a vector with 'c'
x \leftarrow c(1,2,3)
х
## [1] 1 2 3
typeof(x)
## [1] "double"
length(x)
## [1] 3
str(x)
    num [1:3] 1 2 3
```

### Vectors in R

Typical flavors are numeric, integer, character, logical, date, and factor (there are many, many more)

- Vectors are flat: check length with length and type with typeof (or class)
- Check types with is.numeric, is.character, is.logical, etc.
- Coerce types with as.numeric, as.character, as.Date etc.

```
# Create a vector with 'c'
y <- c("one", "two", "three", "4")
is.character(y)
## [1] TRUE
as.numeric(y)</pre>
```

## Warning: NAs introduced by coercion
## [1] NA NA NA 4

```
Operations are vectorized and elementwise (unless specified)
```

```
#Vectorized operations
x \leftarrow c(3:5) # Note this is the same as c(3,4,5)
y \leftarrow seq(from=2,to=6,by=2) #Note this is the same as seq(2,6,2)
x / 2
## [1] 1.5 2.0 2.5
sqrt(x)
## [1] 1.732051 2.000000 2.236068
x - y
## [1] 1 0 -1
```

### Vectors in R

```
To subset a vector we use [] notation, and specify an index
```

```
x <- c(1,10,8,5,2)
x[1]
## [1] 1
x[3]
```

[3,] 3 6

The most common structure in R (the dataframe) is an extension of the matrix

```
# Assign a rote matrix in R
z <- matrix(1:9,3,3)
dim(z)
## [1] 3 3
z
## [,1] [,2] [,3]
## [1,] 1 4 7
## [2,] 2 5 8</pre>
```

## Matrices in R

### Again, R uses [] notation

- i,j matrix notation
- Empty rows (or columns) return all
  - X[2,]; X[,3]; X[2,3]
- c() can be used to select multiple rows or columns
  - X[c(1,2,3,4,5),]
  - X[,c(1:3)]
- Always: X[selection of rows, selection of columns]

```
z \leftarrow matrix(seq(1,12),3,4)
z[2:3, 3:4]
## [,1] [,2]
## [1,] 8 11
## [2,] 9 12
z[,2:3]
## [,1] [,2]
## [1,] 4 7
## [2,] 5 8
## [3,] 6
z[,1]
## [1] 1 2 3
```

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Dataframes are the most commonly used data object in R

Essentially a souped-up matrix with i,j notation

C.

- Each column is one type of data (i.e. character, numeric, date, logical, etc.)
- Use [] notation to index in, can use column names or integer indexes
- Most all data read into R will be in the form of a dataframe

```
str(df)
   'data.frame': 3 obs. of 3 variables:
##
##
    $ nums_1: num 1 2 3
    $ nums_2: num 6 5 4
##
                   "a" "b" "c"
##
    $ strs : chr
df
##
     nums_1 nums_2 strs
                      а
                      b
## 2
```

```
df [2,]
##
  nums_1 nums_2 strs
## 2 2 5 b
df[,3]
## [1] "a" "b" "c"
df[2,1]
## [1] 2
df[c(1:3),]
##
    nums_1 nums_2 strs
## 1
              6
                   a
## 2 2 5 b
## 3
                   С
```

# Subsetting dataframes in R

- \$ notation is preferred for selecting/working with columns
  - Requires the column name
  - \$ returns the column as a vector, [] returns a data.frame
  - Less ambiguous, less error-prone
  - Can combine \$ notation with [] for readability and automation
  - [[]] can be used to similar effect with integer indexes

There is a subset() function - I'd encourage you not to use it

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```
df$nums 1
## [1] 1 2 3
df$nums 1[1:2]
## [1] 1 2
df[[1]]
## [1] 1 2 3
df[c("nums_1", "nums_2")]
##
     nums 1 nums 2
```

### Lists in R

#### Objects which can act as a collection of varied data types

- A list can contain any number of elements of vectors, matrices, dataframes, etc.
- Uses [[]] and \$ notation for accessing elements, much like the data.frame
- Very useful for storing multifaceted data and for automation purposes
- Families of R functions work off of the list structure

```
my_list <- list()</pre>
my_list_a_vector \leftarrow c(1,2,3)
my_list$a_matrix <- matrix(seq(1,9),3,3)
my_list$a_dataframe <- df</pre>
my_list$a_vector
## [1] 1 2 3
my_list[[1]]
## [1] 1 2 3
my_list[[1]][1:2]
## [1] 1 2
```

# Reading in data in R

There are a lot of ways to read in data, and just as many places to get it

- Use the setwd() function to set the working directory (or see the 'Files' tab)
- We'll begin with the most commonly used: read.csv
- variable <- read.csv(file.path, ...)

We can pull in other types of data (dta, sas7bdat, SQL, etc.) with the help of packages/libraries

- install.packages and library commands
- If you can think it, there is probably a package that can do it
- More on this in a moment

Once data is in memory, the obvious next step is to inspect it

- head, tail, str, names, nrow, ncol, dim, summary, table, unique, etc.
- We can also grab summary statistics ad hoc

```
salaries_data <- read.csv("Salaries.csv", stringsAsFactors = F)</pre>
dim(salaries_data)
## [1] 397
str(salaries data)
   'data.frame':
                397 obs. of 7 variables:
##
   $ X
                          1 2 3 4 5 6 7 8 9 10 ...
##
                   : int
                   : chr
##
   $ rank
                         "Prof" "Prof" "AsstProf" "Prof" ...
                          "B" "B" "B" "B" ...
##
   $ discipline
                   : chr
##
   $ yrs.since.phd: int
                          19 20 4 45 40 6 30 45 21 18 ...
##
   $ yrs.service : int
                          18 16 3 39 41 6 23 45 20 18 ...
##
    $ sex
                   : chr
                          "Male" "Male" "Male" "Male" ...
##
    $ salary
                   : int
                          139750 173200 79750 115000 141500 97000 1
```

# Reading in *more* data in R

In order to pull in less 'traditional' data, we need to rely on functions outside the scope of base  $\ensuremath{\mathsf{R}}$ 

- Think of packages like apps, DLC, game expansions, etc.
- Packages make R extensible, and give you access to a multitude of functions 'off the shelf'
- Free to download and use (open-source!)
- Again, if you think it, there is probably a package that can do it
- $\bullet \ \ https://cran.r-project.org/web/packages/available\_packages\_by\_name.html$

#### To access new packages

- install.packages("haven")
- library(haven)
- help(package = "haven")
- To access a specific function in an installed package, without loading it, use package::function

```
# install.packages("haven")
library(haven)
wage_data <- data.frame(read_dta("MROZ.dta"))</pre>
head(wage data[1:9])
    inlf hours kidslt6 kidsge6 age educ wage repwage hushrs
##
          1610
                               32
                                    12 3.3540
                                                2.65
                                                       2708
## 1
       1
## 2
          1656
                               30 12 1.3889
                                                2.65
                                                       2310
## 3
          1980
                            3
                               35 12 4.5455 4.04
                                                       3072
## 4
       1
          456
                               34 12 1.0965 3.25
                                                       1920
## 5
          1568
                            2 31 14 4.5918 3.60
                                                       2000
          2032
                               54
                                    12 4.7421
                                                4.70
                                                       1040
## 6
```

# Writing data out in R

A typical workflow also involves performing analysis in R, and writing the data out for use in other programs

- Most commonly, use write.csv much the same as read.csv
- writeRDS creates R-specific files with better compression
- The packages above (and others) allow for writing out to more niche/complicated file formats
  - readx1 for writing out to Excel spreadsheets
  - haven for writing out to Stata, SAS, etc.

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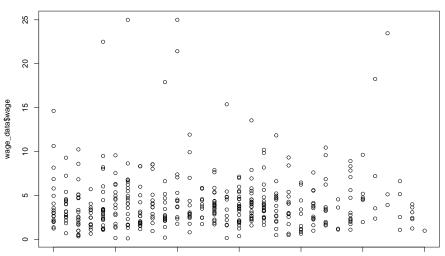
## Basics of plotting R

R is especially powerful for data visualization

- Base R plots are extremely customizable, and can get you a long way (?plot)
- hist() and boxplot() are also available 'off the shelf'
- There are tons of great packages available, particularly ggplot2, to take you
  even further
- As always documentation is your best friend
- https://www.r-graph-gallery.com/

## Basics of plotting R

plot(wage\_data\$age, wage\_data\$wage)



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# Basics of modeling in R

Simple linear models (OLS) with 1m

- $lm(y \sim x1 + x2 + x3 + ... + xn, data = data)$
- R is, first and foremost, a statistical computing language, so it's modeling capabilities can't be understated
- Unfortunately, we won't delve much into this here

## -2.0924

```
# Simple regression
fit <- lm(wage~educ, wage_data)
fit

##
## Call:
## lm(formula = wage ~ educ, data = wage_data)
##
## Coefficients:
## (Intercept) educ</pre>
```

0.4953

## Conditionals

- ==, !=
- <, >
- <=, >=
- %in%
- is.family
- | and &
- || and &&

```
# Conditionals
1 < 2
## [1] TRUE
x < y
## Warning in x < y: longer object length is not a multiple of short
## length
## [1] TRUE FALSE FALSE FALSE TRUE
x == v
## Warning in x == y: longer object length is not a multiple of short
## length
## [1] FALSE FALSE FALSE FALSE
1 != 1
## [1] FALSE
x %in% z
```

### Conditionals

By themselves, conditionals seem boring/useless - used in control flow and for subsetting, they are incredibly useful

- The booleans generated from conditionals can be used for filtering data
- TRUE and FALSE values deterime what is kept and what is dropped
- Can be combined with which to return indices

```
# Using conditionals
x \leftarrow c(10,90,2,0,7,10,4)
x >= 10
## [1] TRUE TRUE FALSE FALSE FALSE TRUE FALSE
which(x >= 10)
## [1] 1 2 6
# Using conditionals in subsetting
dim(salaries data)
## [1] 397 7
dim(salaries data[salaries data$salary > 100000,])
## [1] 256 7
```

### **Practice**

#### Using the 'Salaries' dataset:

- Using subsetting, drop the X index column
- Create both a histogram and a boxplot of the salary variable
- What proportion of the professors in the dataset are Female?
- Conduct a simple linear regression of yrs.service on salary
- Report the coefficients, standard errors, and confidence interval for the regression specified above
- Create a simple plot of yrs.service and salary
- Using ?plot, create properly formatted labels and titles for the plot above
- What is the average salary of the AssocProf rank?
- Compute the standard deviations in salary for male and female professors, separately
- Which discipline has the higher median salary?
- How many years of service does the 200th individual in this dataset have?

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# Warm-up

- Read the state\_unemp\_clean.csv data into memory and assign it to a variable of your choosing
- Convert the date column to the date type (Hint: Use as.Date and reassign it to the date variable)
- Which state has the highest unemployment rate in the sample?
- In what year was that rate reached?
- What is the average household income across all the states in the sample?
- Create a time-series plot of the unemployment rate in the state with the lowest unemployment rate in 2016
- Change the x- and y-labels and plot title to descriptive names
- Using ?plot for help, change the type of the plot to a line graph

#### Control flow

Determine the behavior of your program based on a specified condition

```
if (condition) {
   true_action
} else {
   false_action
}
```

```
a < -7
if(a\%2 == 0) {
 print("even")
} else {
  print("odd")
}
## [1] "odd"
ifelse(a\\\\\\2 == 0, "even", "odd")
## [1] "odd"
```

#### **Functions**

When what you need isn't available in base R or a package - write it!

User defined functions:

- Make code easier to read
- Reduce the possibility of human error
- Can be called where/whenever once defined
- Again, make automation/reproducibility easier

Rule of thumb: If you have to cut and paste the same complicated block of code more than twice, it might be helpful to define a function that can do it for you

```
# A *very* simple function
square <- function(x) {
  return(x**2)
}
square(3)
## [1] 9
square(x)
## [1] 100 8100 4 0 49 100 16</pre>
```

### Loops

#### Two flavors

- for
- while
- Critically important for automation tasks/reproducibility

We will loop across (unsurprisingly) vectors in R

- This means we are not constrained to looping over indexes
- Can loop over indexes, but also vectors of strings (i.e. IDs)

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### Loops

#### General structure

```
• for/while (object in (vector of things to loop over)) {

    code that is executed over each element of the vector of things to loop over

  • }
# Simple loop
for(i in 1:5){
  print(i)
```

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

}

### Loops

```
#Loops - extending our mix of control flow and conditionals above
a vector \leftarrow c(1,6,7,8,8293,21,888,3,-2)
for(i in 1:length(a vector)){
  if(a \ vector[i] \%2 == 0)  {
    print("even")
  } else {
    print("odd")
}
## [1] "odd"
   [1] "even"
## [1] "odd"
## [1] "even"
##
   [1] "odd"
```

[1] "odd" [1] "even"

[1] "odd"

##

## ##

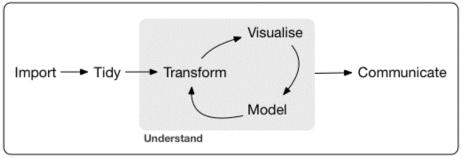
##

### **Practice**

Specify a random vector using the following syntax rand\_vect <-round(100\*runif(1000),0)

- Write a function cube, which takes a value and returns that value cubed; write a loop to apply this function to all the elements of the vector; print the cubed values
- Using a loop and control flow, check if each element of the vector is a perfect square, if it is return the index, i, and print "Perfect square!"
  Hint: Use x%1 to check if your number is a whole number
- Load the 'salaries\_list.Rds' object into memory (readRDS())
- Inspect the list; what does each element contain? What is distinct about them?
- Loop through the list, and return the average of the yrs.since.phd variable for each element

# Data analysis



Program

# Data cleaning and manipulation

Likely a big part of your next job

Typically involves...

- Data aggregation
- Merging together datasets from multiple sources
- Dealing with missing values
- Reshaping data
- And more

# 'Tidy' data

"Like families, tidy datasets are all alike but every messy dataset is messy in its own way." - Hadley Wickham has sought to advance a "standard" of sorts for what constitutes "tidy" data:

- Each variable forms a column.
- Each observation forms a row.
- Each type of observational unit forms a table.

These principles are adopted with the intent of reducing the time spent on data wrangling

- More time for modeling/the fun stuff
- Many packages to do this
- Base R does just fine, but we'll start working with dplyr here

# Dealing with missing values

Missing values are 'contagious' and will interfere with summary functions

 Generally, it's okay to remove these, and we can do so by setting na.rm = TRUE in summary functions

How to deal with missing values depends on your particular research question

- is.na() (also good for 'special' missing values)
- complete.cases()
- na.omit()
- df[is.na(df)] <- replacement

### dplyr basics

#### Why dplyr?

- Provides a grammar of data manipulation
- Standardized most all dplyr commands follow the same, general, structure for arguments
  - newdata <- (data, selection/condition/formula/etc.)</li>
- Human-readable it's easier for those less familiar to follow code written with human english
  - 'Does what it says on the tin'
- Compatibility works seemlessly with other tidyverse packages, and extends base R
- Fast, expressive, and agnostic about the format of your data
- glimpse()

# dplyr basics

5 simple commands to make your life easier

```
select() :: $ and []filter() :: subset()arrange() :: sort()
```

• mutate() :: data\$new\_var <- var</pre>

• summarise() :: aggregate()

```
select()
  • newdata <- select(data, column1, column2,.)</pre>

    Note the difference between - and !

       • ! is used for negating rows and conditionals

    - is used for negating column selection

    Helper functions

       starts_with, ends_with, contains, matches, everything()
filter()
  • newdata <- filter(data, conditions)</pre>

    Remember your conditionals!

arrange()
```

# dplyr basics

```
mutate()
summarise()
```

### **Pipes**

One of the most powerful elements of dplyr programming is the pipe - %>%

- "Pipes" data into a function
- Defaults to first argument, taking advantage of dplyr's standardization
- Sends output from the function to the next
- data1 %>% stuff is done to data1 and becomes data2 %>% stuff is done to data2 etc.
- Especially powerful when using group\_by for subsetting

# Merges and joins

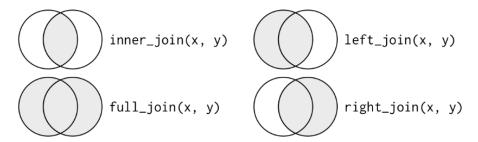
#### Base R

- cbind() binds data frames/matrices column-wise
- rbind() binds data frames/matrices row-wise (requires columns share the same name)
  - Requires equal numbers of columns/rows, respectively
  - Not a merge does not involve keys
- merge()

#### dplyr

- bind\_rows() and bind\_cols() are better variants of the above
- left\_join()
  - One of many dplyr merge commands-most commonly used
  - mutating and filtering joins

# Merges and joins



https://r4ds.had.co.nz/relational-data.html#understanding-joins

#### **Practice**

- Merge in the World Development Indicators indicators data with the WEO data
- Report countries that did not receive valid region identifers and remove them
- Using dplyr and pipes (if you can!), in one chained command, create a subset of the data that:
  - Has only those observations from the Europe & Central Asia region from 2016
  - Has only the country, gdp\_cp, unemployment\_rate, and curr\_acc\_bal values
- Change the units of unemployment\_rate to reflect a percent with a mutate command (divide by 100)
- Find the average unemployment rate for this group
- Create a time-series plot of Danish unemployment over the sample period
- Find the average level of GDP for each income group
- Which region has the largest within-region disparity in GDP per capita, as measured by standard deviation?

### Dates

#### as.Date(string, format)

Symbol	Meaning	Example
%d	day as a number (0-31)	01-31
%a	abbreviated weekday	Mon
%A	unabbreviated weekday	Monday
%m	month (00-12)	00-12
%b	abbreviated month	Jan
%B	unabbreviated month	January
% <b>y</b>	2-digit year	07
% <b>Y</b>	4-digit year	2007

lubridate

# Useful functions for cleaning and automation

#### Regular expressions

- gsub, sub, grep, grepl
- Paste commands (string manipulation)
  - paste and paste0
  - substr
  - stringr

#### The apply family

- Speedier loops in disguise
  - i.e. work through each element of a list or vector, each column of a dataframe, etc.
  - lapply and sapply (with others)
  - lapply(data, function)

#### Reduce() and do.call() for condensing lists

• do.call(list, function)

# More tidying functions

There will be times where you confront data in the wrong 'format'

- Most commonly, time series data that is 'wide' (i.e. each variable is a year)
- tidyr is a lightweight package to address this, without cumbersome loops
- gather() will gather 'wide' data
- spread() will spread 'long' data

### A gentle introduction to ggplot2

Plots are built in layers of 'geom' functions

- ggplot(data = mpg, aes(x = cty, y = hwy)) + geom\_point()
- qplot is a quick interface to work with ggplot, relying on useful defaults

### ggplot2 layering

How does the ggplot() function work? By adding layers

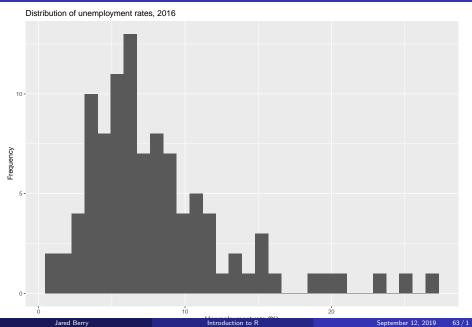
- Specify an input data set
- Specify the columns to be used for x and y variables
- Specify the type of plot

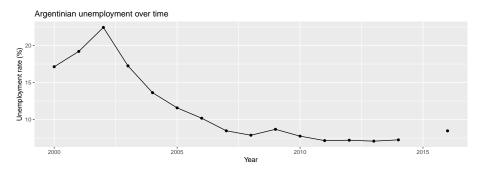
```
# Give ggplot an input dataset, and a variable to plot
ggplot(weo_2016, aes(x=unemployment_rate)) +

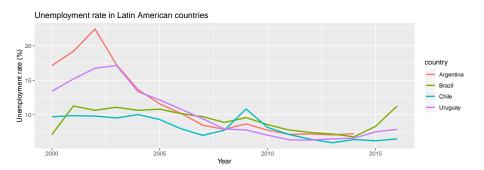
# Pick the shape
geom_histogram(bins=30) +

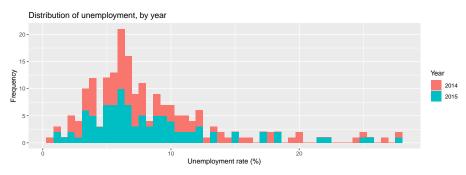
# Set some labels
labs(x = "Unemployment rate (%)",
    y = "Frequency",
    title = "Distribution of unemployment rates, 2016")
```

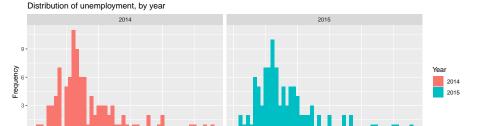
# ggplot2











Unemployment rate (%)

### ggplot2 practice

- Ensure you have weo\_full in memory if not, revisit the code from the session\_2.R file
- Plot the GDP per capita values for the Europe & Central Asia region over time, with each country as a separate color; label accordingly
- Using dplyr commands (and pipes, if possible), plot the average unemployment\_rate over time, with each region as its own color; label accordingly
- Bonus: Try to replicate both of these plots using the qplot function

#### R Markdown

We've been working exclusively with R scripts (.R files)

- R scripts are standard for writing reproducible code
- R scripts are not particularly high-quality for presentation purposes

R Markdown wraps a markup language (think LaTeX, XML, etc.) around the R programming language

- R Markdown can embed all of your code into a 'prettified' HTML, PDF, or Word file
- With very little effort, you can put together high-quality reports and presentations with embedded code and data visualizations

#### Resources

- https://r4ds.had.co.nz/
- http://adv-r.had.co.nz/
- https://www.rstudio.com/resources/cheatsheets/
- https://www.datacamp.com/
- https://lagunita.stanford.edu/courses/HumanitiesSciences/StatLearning/Winter2016/about