

Tidy Survey Analysis in R using the `srvyr` Package

Workshop Day 3 - Design Objects, Variables, and Process

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Introduction

Overview

- At the end of this workshop series, you should be able to
 - Calculate point estimates and their standard errors with survey data
 - Proportions, totals, and counts
 - Means, quantiles, and ratios
 - Perform t-tests and chi-squared tests
 - Fit regression models
 - Specify a survey design in R to create a survey object
- We will not be going over the following but provide some resources at the end
 - Weighting (calibration, post-stratification, raking, etc.)
 - Survival analysis
 - Nonlinear models

About Us



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Thank you to our volunteers!

Greg Freedman-Ellis and **Raphael Nishimura** will be assisting during our breakout rooms.

About This Workshop

- Hosted by Midwest Association for Public Opinion Research (MAPOR), a regional chapter of the American Association for Public Opinion Research (AAPOR).
- Originally delivered at AAPOR Conference in May 2021

Midwest Association
for Public Opinion Research



Upcoming Work

- Book on analyzing survey data in R, published by CRC, Taylor & Francis Group
- We would love your help! After each course, we will send out a survey to gather your feedback on the material, organization, etc.
- Keep updated by following our project on GitHub: <https://github.com/tidy-survey-r>

Workshop Overview

Workshop Series Roadmap

- Get familiar with RStudio Cloud with a warm-up exercise using the tidyverse (day 1)
- Introduce the survey data we'll be using in the workshop (day 1)
- Analysis of categorical data with time for practice (day 1)
- Analysis of continuous data with time for practice (day 2)
- Survey design objects, constructing replicate weights, and creating derived variables (today)

Logistics

- We will be using RStudio Cloud today to ensure everyone has access
- Sign-up for a free RStudio Cloud account
 - Access the project and files via link in email and Zoom chat
 - Click "START" to open the project and get started
 - Rstudio Cloud has the same features and appearance as RStudio for ease of use
- All slides and code are available on GitHub: <https://github.com/tidy-survey-r/tidy-survey-short-course>

Specifying sample design objects

Overview of Survey Analysis using `srvyr` Package

Discussing step 1! Steps 2-4 discussed in prior workshops

1. Create a `tbl_svy` object using: `as_survey_design` or `as_survey_rep`
2. Subset data (if needed) using `filter` (subpopulations)
3. Specify domains of analysis using `group_by`
4. Within `summarize`, specify variables to calculate including means, totals, proportions, quantiles and more

Review of sampling designs

These features can be combined to form one design

- Simple random sampling: every unit has the same chance of being selected
 - Without replacement: units can only be selected once
 - With replacement: units can be selected more than once
- Systematic sampling: sample n individuals from a ordered list and sampling individuals at an interval with a random starting point
- Probability proportional to size: probability of selection is proportional to "size"
- Stratified sampling: divide population into mutually exclusive subgroups (strata). Randomly sample within each stratum
- Clustered sampling: divide population into mutually exclusive subgroups (clusters). Randomly sample clusters and then individuals within clusters

Determining the design

- Look at documentation associated with the analysis file
- Keywords to look for: methodology, design, analysis guide, technical documentation
- Documentation will indicate the variables needed to specify the design. Look for:
 - weight (almost always)
 - strata and/or clusters/PSUs. Sometimes pseudo-strata and pseudo-cluster OR
 - replicate weights (this is used instead of strata/clusters for analysis)
 - might also see finite population correction or population sizes
- Documentation may include syntax for SAS, SUDAAN, Stata and/or R!

Example: 2020 ANES

- <https://electionstudies.org/data-center/2020-time-series-study/>
- Opened the file "User Guide and Codebook"
- Section "Data Analysis, Weights, and Variance Estimation": Page 8-12 includes information on weights and strata/cluster variables

For analysis of the complete set of cases using pre-election data only, including all cases and representative of the 2020 electorate, use the full sample pre-election weight, V200010a. For analysis including post-election data for the complete set of participants (i.e., analysis of post-election data only or a combination of pre- and post-election data), use the full sample post-election weight, V200010b. Additional weights are provided for analysis of subsets of the data...

For weight	Use variance unit/PSU/cluster	and use variance stratum
V200010a	V200010c	V200010d
V200010b	V200010c	V200010d

Example: RECS 2015

- <https://www.eia.gov/consumption/residential/data/2015/index.php?view=microdata>
- Opened the file "Using the 2015 microdata file to compute estimates and standard errors (RSEs)"
- Page 4:

The following instructions are examples for calculating any RECS estimate using the final weights (NWEIGHT) and the associated RSE using the replicate weights (BRRWT1 – BRRWT96).

Let ϵ be the Fay coefficient ... and $\epsilon = 0.5$

- Page 9: Syntax given for survey package which is similar to svy (as we will see)

```
library(survey)
RECS15 <- read.csv(file='< location where file is stored >', header=TRUE, sep=",")
sampweights <- RECS15$NWEIGHT
brrwts <- RECS15[, grepl("BRRWT", names(RECS15))]
des <- svrepdesign(weights=sampweights, repweights=brrwts, type="Fay",
                     rho=0.5, mse=TRUE, data=RECS15)
```

Specify the sampling design: no replicate weights provided

- Specifying the sampling design when you don't have replicate weights
- This creates a `tbl_svy` object that then correctly calculates weighted estimates and SEs using methods from Workshop 1 and 2

```
as_survey_design(  
  .data,  
  ids = NULL,#cluster IDs/PSUs  
  strata = NULL,#strata variables  
  variables = NULL,#defaults to all in .data  
  fpc = NULL,#variables defining the fpc  
  nest = FALSE,#TRUE/FALSE – relabel clusters to nest within strata  
  check_strata = !nest, #check that clusters are nested in strata  
  weights = NULL,# weight variable  
  ...  
)
```

Syntax for common designs

```
# simple random sample (SRS)
apisrs %>% as_survey_design(fpc = fpc)

# stratified sample
apistrat %>% as_survey_design(strata = stype, weights = pw)

# one-stage cluster sample
apiclus1 %>% as_survey_design(ids = dnum, weights = pw, fpc = fpc)

# two-stage cluster sample, weights computed from pop size
apiclus2 %>% as_survey_design(ids = c(dnum, snum), fpc = c(fpc1, fpc2))

# stratified, cluster design
apistrat %>% as_survey_design(ids = dnum, strata = stype, weights = pw, nest = TRUE)
```

- examples from [svydesign](#) help documentation

ANES Example

For weight Use variance unit/PSU/cluster and use variance stratum

V200010b V200010c

V200010d

```
options(width=130)
library(tidyverse) # for tidyverse
library(here) # for file paths
library(srvyr) # for tidy survey analysis
anes <- read_rds(here("Data", "anes_2020.rds")) %>%
  mutate(Weight=V200010b/sum(V200010b)*231592693)

anes_des <- anes %>%
  as_survey_design(weights = Weight,
                    strata = V200010d,
                    ids = V200010c,
                    nest = TRUE)
summary(anes_des)
```

ANES Example (cont'd)

```
## Stratified 1 - level Cluster Sampling design (with replacement)
## With (101) clusters.
## Called via srvyr
## Probabilities:
##      Min.    1st Qu.     Median      Mean    3rd Qu.      Max.
## 4.839e-06 2.657e-05 4.689e-05 7.688e-05 8.331e-05 3.895e-03
## Stratum Sizes:
##          1   2   3   4   5   6   7   8   9   10  11  12  13  14  15  16  17  18  19  20  21  22  23  24  25  26  27  28  29
## obs      167 148 158 151 147 172 163 159 160 159 137 179 148 160 159 148 158 156 154 144 170 146 165 147 169 165 172 133 157
## design.PSU 3   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2
## actual.PSU 3   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2
##          30  31  32  33  34  35  36  37  38  39  40  41  42  43  44  45  46  47  48  49  50
## obs      167 154 143 143 124 138 130 136 145 140 125 158 146 130 126 126 135 133 140 133 130
## design.PSU 2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2
## actual.PSU 2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2   2
## Data variables:
## [1] "V200010b"           "V200010d"           "V200010c"           "V200002"
## [5] "V201006"             "V201102"             "V201101"             "V201103"
## [9] "V201025x"            "V201231x"            "V201233"             "V201237"
## [13] "V201507x"            "V201510"              "V201549x"            "V201600"
## [17] "V201617x"            "V202066"              "V202109x"            "V202072"
## [21] "V202073"             "V202110x"             "InterviewMode"        "Weight"
## [25] "Stratum"              "VarUnit"              "Age"                 "AgeGroup"
## [29] "Gender"               "RaceEth"              "PartyID"              "Education"
## [33] "Income"                "Income7"              "CampaignInterest"    "TrustGovernment"
## [37] "TrustPeople"           "VotedPres2016"         "VotedPres2016_selection" "VotedPres2020"
## [41] "VotedPres2020_selection" "EarlyVote2020"
```

RECS Example

- Final weights: NWEIGHT Replicate weights: BRRWT1 – BRRWT96

```
options(width=130)
recs <- read_rds(here("Data", "recs.rds"))

recs_des <- recs %>%
  as_survey_rep(weights=NWEIGHT,
                repweights=starts_with("BRRWT"),
                type="Fay",
                rho=0.5,
                mse=TRUE)

summary(recs_des)
```

RECS Example (cont'd)

```
## Call: Called via srvyr
## Fay's variance method (rho= 0.5 ) with 96 replicates and MSE variances.
## Sampling variables:
## - repweights: `BRRWT1 + BRRWT2 + BRRWT3 + BRRWT4 + BRRWT5 + BRRWT6 + BRRWT7 + BRRWT8 + BRRWT9 + BRRWT10 + BRRWT11 + BRRWT12 + BRRWT13
## - weights: NWEIGHT
## Data variables: DOEID (dbl), Region (fct), Division (fct), MSASatus (fct), Urbanicity (fct), HousingUnitType (fct), YearMade
## (ord), SpaceHeatingUsed (lgl), HeatingBehavior (fct), WinterTempDay (dbl), WinterTempAway (dbl), WinterTempNight (dbl), ACUsed
## (lgl), ACBehavior (fct), SummerTempDay (dbl), SummerTempAway (dbl), SummerTempNight (dbl), TOTCSQFT (dbl), TOTHSQFT (dbl),
## TOTSQFT_EN (dbl), TOTUCSQFT (dbl), TOTUSQFT (dbl), NWEIGHT (dbl), BRRWT1 (dbl), BRRWT2 (dbl), BRRWT3 (dbl), BRRWT4 (dbl),
## BRRWT5 (dbl), BRRWT6 (dbl), BRRWT7 (dbl), BRRWT8 (dbl), BRRWT9 (dbl), BRRWT10 (dbl), BRRWT11 (dbl), BRRWT12 (dbl), BRRWT13
## (dbl), BRRWT14 (dbl), BRRWT15 (dbl), BRRWT16 (dbl), BRRWT17 (dbl), BRRWT18 (dbl), BRRWT19 (dbl), BRRWT20 (dbl), BRRWT21 (dbl),
## BRRWT22 (dbl), BRRWT23 (dbl), BRRWT24 (dbl), BRRWT25 (dbl), BRRWT26 (dbl), BRRWT27 (dbl), BRRWT28 (dbl), BRRWT29 (dbl), BRRWT30
## (dbl), BRRWT31 (dbl), BRRWT32 (dbl), BRRWT33 (dbl), BRRWT34 (dbl), BRRWT35 (dbl), BRRWT36 (dbl), BRRWT37 (dbl), BRRWT38 (dbl),
## BRRWT39 (dbl), BRRWT40 (dbl), BRRWT41 (dbl), BRRWT42 (dbl), BRRWT43 (dbl), BRRWT44 (dbl), BRRWT45 (dbl), BRRWT46 (dbl), BRRWT47
## (dbl), BRRWT48 (dbl), BRRWT49 (dbl), BRRWT50 (dbl), BRRWT51 (dbl), BRRWT52 (dbl), BRRWT53 (dbl), BRRWT54 (dbl), BRRWT55 (dbl),
## BRRWT56 (dbl), BRRWT57 (dbl), BRRWT58 (dbl), BRRWT59 (dbl), BRRWT60 (dbl), BRRWT61 (dbl), BRRWT62 (dbl), BRRWT63 (dbl), BRRWT64
## (dbl), BRRWT65 (dbl), BRRWT66 (dbl), BRRWT67 (dbl), BRRWT68 (dbl), BRRWT69 (dbl), BRRWT70 (dbl), BRRWT71 (dbl), BRRWT72 (dbl),
## BRRWT73 (dbl), BRRWT74 (dbl), BRRWT75 (dbl), BRRWT76 (dbl), BRRWT77 (dbl), BRRWT78 (dbl), BRRWT79 (dbl), BRRWT80 (dbl), BRRWT81
## (dbl), BRRWT82 (dbl), BRRWT83 (dbl), BRRWT84 (dbl), BRRWT85 (dbl), BRRWT86 (dbl), BRRWT87 (dbl), BRRWT88 (dbl), BRRWT89 (dbl),
## BRRWT90 (dbl), BRRWT91 (dbl), BRRWT92 (dbl), BRRWT93 (dbl), BRRWT94 (dbl), BRRWT95 (dbl), BRRWT96 (dbl), CDD30YR (dbl), CDD65
## (dbl), CDD80 (dbl), ClimateRegion_BA (fct), ClimateRegion_IECC (fct), HDD30YR (dbl), HDD65 (dbl), HDD50 (dbl), GNDHDD65 (dbl),
## BTUEL (dbl), DOLLAREL (dbl), BTUNG (dbl), DOLLARNG (dbl), BTULP (dbl), DOLLARLP (dbl), BTUFO (dbl), DOLLARFO (dbl), TOTALBTU
## (dbl), TOTALDOL (dbl), BTUWOOD (dbl), BTUPELLET (dbl)
## Variables:
## [1] "DOEID"           "Region"          "Division"        "MSASatus"       "Urbanicity"
## [6] "HousingUnitType" "YearMade"         "SpaceHeatingUsed" "HeatingBehavior" "WinterTempDay"
## [11] "WinterTempAway"  "WinterTempNight" "ACUsed"          "ACBehavior"     "SummerTempDay"
## [16] "SummerTempAway"  "SummerTempNight" "TOTCSQFT"        "TOTHSQFT"       "TOTSQFT_EN"
## [21] "TOTUCSQFT"       "TOTUSQFT"        "NWEIGHT"         "BRRWT1"         "BRRWT2"
```

Create Survey Design Object for ACS

Fill in the blanks

- Analysis weight: PWGTP
- replicate weights: PWGTP1-PWGTP180
- jackknife with scale adjustment of 4/80

```
acs_des <- acs_pums %>%
  as_survey_rep(
    weights = _____,
    repweights = _____,
    type = _____,
    scale = _____
  )
```

Create Survey Design Object for ACS

Fill in the blanks

- Analysis weight: PWGTP
- replicate weights: PWGTP1-PWGTP180
- jackknife with scale adjustment of 4/80

```
acs_des <- acs_pums %>%
  as_survey_rep(
    weights=______,
    repweights=______,
    type=______,
    scale=_____
  )
```

```
acs_des <- acs_pums %>%
  as_survey_rep(
    weights=PWGTP,
    repweights=stringr::str_c("PWGTP", 1:80),
    type="JK1",
    scale=4/80
  )
```

Create Survey Design Object for CPS 2011 Supplement

Fill in the blanks

- Analysis weight: wtsupp
- replicate weights: repwtp1 -repwtp160
- BRR

```
cps_des <- cps %>%
  as_survey_rep(
    weights = _____,
    repweights = _____,
    type = _____
  )
```

Create Survey Design Object for CPS 2011 Supplement

Fill in the blanks

- Analysis weight: wtsupp
- replicate weights: repwtp1 -repwtp160
- BRR

```
cps_des <- cps %>%
  as_survey_rep(
    weights=______,
    repweights=______,
    type=______)
  )
```

```
cps_des <- cps %>%
  as_survey_rep(
    weights=wtsupp,
    repweights=starts_with("repwtp"),
    type="BRR"
  )
```

Create Survey Design Object for NHANES

Fill in the blanks

- Analysis weight: WTINT2YR
- Variance Stratum: SDMVSTRA
- Variance Primary Sampling Unit: VPSU

```
nhanes_des <- nhanes %>%
  as_survey_design(
    weights = _____,
    ids = _____,
    strata = _____,
    fpc = _____
  )
```

Create Survey Design Object for NHANES

Fill in the blanks

- Analysis weight: WTINT2YR
- Variance Stratum: SDMVSTRA
- Variance Primary Sampling Unit: VPSU

```
nhanes_des <- nhanes %>%
  as_survey_design(
    weights=______,
    ids=______,
    strata=______,
    fpc=______
  )
```

```
nhanes_des <- nhanes %>%
  as_survey_design(
    weights=WTINT2YR,
    ids=VPSU,
    strata=SDMVSTRA,
    fpc=NULL
  )
```

Create Survey Design Object for LEMAS 2016

Fill in the blanks

- Analysis weight: ANALYSISWEIGHT
- Variance Stratum: STRATA
- FPC: FRAMESIZE

```
lemas_des <- lemas %>%
  as_survey_design(
    weights = _____,
    ids = _____,
    strata = _____,
    fpc = _____
  )
```

Create Survey Design Object for LEMAS 2016

Fill in the blanks

- Analysis weight: ANALYSISWEIGHT
- Variance Stratum: STRATA
- FPC: FRAMESIZE

```
lemas_des <- lemas %>%
  as_survey_design(
    weights=______,
    ids=______,
    strata=______,
    fpc=______
  )
```

```
lemas_des <- lemas %>%
  as_survey_design(
    weights=ANALYSISWEIGHT,
    ids=1,
    strata=STRATA,
    fpc=FRAMESIZE
  )
```

Breakout rooms: Practice time

- Open DesignDerivedVariablesExercises.Rmd and work on Part 1
- We will take 15 minutes. Use this time for the exercises and questions.

Creating replicate weights

Creating replicate weights syntax

- Begin with a design object (e.g. `tsl_des`) and then create replicate weights
- "auto" uses JKn for stratified, JK1 for unstratified designs
- See help file for `survey::svrepdesign` for more information on replicate weight types

```
tsl_des %>%
  as_survey_rep(
    type = c("auto", "JK1", "JKn", "BRR", "bootstrap", "subbootstrap", "mrbbootstrap", "Fay"),
    ...
  )
```

Create Replicate Weights: example 1 (jackknife)

- Since this is not stratified, automatically used JK1

```
data(api)
dclus1 <- apiclus1 %>% as_survey_design(ids = dnum, weights = pw, fpc = fpc)
rclus1 <- as_survey_rep(dclus1)
summary(rclus1)

## Call: Called via svydesign
## Unstratified cluster jackknife (JK1) with 15 replicates.
## Data variables: cds (chr), stype (fct), name (chr), sname (dbl), dname (chr), dnum (int), cname (chr), cnum (int),
##   flag (int), pcttest (int), api00 (int), api99 (int), target (int), growth (int), sch.wide (fct), comp.imp (fct), both (fct),
##   awards (fct), meals (int), ell (int), yr.rnd (fct), mobility (int), acs.k3 (int), acs.46 (int), acs.core (int), pct.resp (int),
##   not.hsg (int), hsg (int), some.col (int), col.grad (int), grad.sch (int), avg.ed (dbl), full (int), emer (int), enroll (int),
##   api.stu (int), fpc (dbl), pw (dbl)
## Variables:
## [1] "cds"      "stype"     "name"      "sname"      "snum"      "dname"      "dnum"      "cname"      "cnum"      "flag"      "pcttest"
## [12] "api00"    "api99"    "target"    "growth"    "sch.wide"  "comp.imp"  "both"      "awards"    "meals"    "ell"      "yr.rnd"
## [23] "mobility" "acs.k3"    "acs.46"    "acs.core"   "pct.resp"  "not.hsg"    "hsg"       "some.col"  "col.grad" "grad.sch"  "avg.ed"
## [34] "full"     "emer"     "enroll"    "api.stu"   "fpc"       "pw"
```

Create Replicate Weights: example 2 (bootstrap)

- Specifying bootstrap weights

```
bclus1 <- as_survey_rep(dclus1, type="bootstrap", replicates=100)
summary(bclus1)
```

```
## Call: Called via srvyr
## Survey bootstrap with 100 replicates.
## Data variables: cds (chr), stype (fct), name (chr), sname (chr), snum (dbl), dname (chr), dnum (int), cname (chr), cnum (int),
## flag (int), pcttest (int), api00 (int), api99 (int), target (int), growth (int), sch.wide (fct), comp.imp (fct), both (fct),
## awards (fct), meals (int), ell (int), yr.rnd (fct), mobility (int), acs.k3 (int), acs.46 (int), acs.core (int), pct.resp (int),
## not.hsg (int), hsg (int), some.col (int), col.grad (int), grad.sch (int), avg.ed (dbl), full (int), emer (int), enroll (int),
## api.stu (int), fpc (dbl), pw (dbl)
## Variables:
## [1] "cds"      "stype"     "name"      "sname"      "snum"      "dname"      "dnum"      "cname"      "cnum"      "flag"      "pcttest"
## [12] "api00"    "api99"    "target"    "growth"    "sch.wide"   "comp.imp"   "both"      "awards"    "meals"    "ell"      "yr.rnd"
## [23] "mobility" "acs.k3"    "acs.46"    "acs.core"   "pct.resp"   "not.hsg"    "hsg"       "some.col"  "col.grad" "grad.sch"  "avg.ed"
## [34] "full"     "emer"     "enroll"    "api.stu"   "fpc"       "pw"
```

Creating analysis variables

Best practices

Overview

- Terminology: Analysis variable, constructed variable, derived variable, recoded variables
- Variables created from other variables
- Examples:
 - Creating a categorical variable from a continuous variable: Creating a categorical income variable from a continuous variable
 - Collapsing levels of a categorical variable: Collapsing a 5-level party identification variable into 3 levels
 - Creating a construct one or more variables: Binge drinking is defined as men who consumer 5 or more drinks in one sitting OR women who consume 4 or more drinks in one sitting.
- Best practice to create code to check your variable was created as intend

Code example - creating categorical variable

V201507x is respondent age: -9=Refused

```
anes_age <- anes_in %>%
  mutate(
    Age = if_else(V201507x > 0, as.numeric(V201507x), NA_real_),
    AgeGroup = cut(Age, c(17, 29, 39, 49, 59, 69, 200),
                   labels = c("18-29", "30-39", "40-49", "50-59", "60-69", "70 or older")))
anes_age %>%
  group_by(AgeGroup) %>%
  summarise(
    minAge = min(Age),
    maxAge = max(Age),
    minV = min(V201507x),
    maxV = max(V201507x),
    NAV= sum(is.na(V201507x)),
    NAAge=sum(is.na(Age)),
    N=n()
  )
```

Code example - creating categorical variable: output

```
## # A tibble: 7 x 8
##   AgeGroup    minAge  maxAge    minV      maxV  NAV NAAge     N
##   <fct>        <dbl>   <dbl>    <dbl+lbl>  <dbl+lbl> <int> <int> <int>
## 1 18-29          18     29  18          29          0     0    871
## 2 30-39          30     39  30          39          0     0   1241
## 3 40-49          40     49  40          49          0     0   1081
## 4 50-59          50     59  50          59          0     0   1200
## 5 60-69          60     69  60          69          0     0   1436
## 6 70 or older    70     80  70          80 [80. Age 80 or older]  0     0   1330
## 7 <NA>            NA     NA -9 [-9. Refused] -9 [-9. Refused]  0    294    294
```

Code example - collapsing levels

V202073 indicates who the person voted for

```
count(anes_in, V202073)

## # A tibble: 12 x 2
##   V202073      n
##   <dbl+lbl> <int>
## 1 -9 [-9. Refused]     53
## 2 -6 [-6. No post-election interview]      4
## 3 -1 [-1. Inapplicable]    1497
## 4  1 [1. Joe Biden]       3267
## 5  2 [2. Donald Trump]    2462
## 6  3 [3. Jo Jorgensen]     69
## 7  4 [4. Howie Hawkins]    23
## 8  5 [5. Other candidate {SPECIFY}]      56
## 9  7 [7. Specified as Republican candidate]  1
## 10 8 [8. Specified as Libertarian candidate] 3
## 11 11 [11. Specified as don't know]        2
## 12 12 [12. Specified as refused]         16
```

Code example - collapsing levels

Recode V202073 as Biden, Trump, Other, and missing for unknown/no one

```
anes_vote <- anes_in %>%
  mutate(VotedPres2020_selection = factor(
    case_when(
      V202073 == 1 ~ "Biden",
      V202073 == 2 ~ "Trump",
      V202073 >= 3 ~ "Other",
      TRUE ~ NA_character_
    ),
    levels = c("Biden", "Trump", "Other")))
anes_vote %>% count(VotedPres2020_selection, V202073)
```

Code example - collapsing levels: output

```
## # A tibble: 12 x 3
##   VotedPres2020_selection      V202073     n
##   <fct>                      <dbl+lbl> <int>
## 1 Biden                       1 [1. Joe Biden]    3267
## 2 Trump                        2 [2. Donald Trump]   2462
## 3 Other                        3 [3. Jo Jorgensen]   69
## 4 Other                        4 [4. Howie Hawkins]  23
## 5 Other                        5 [5. Other candidate {SPECIFY}] 56
## 6 Other                        7 [7. Specified as Republican candidate] 1
## 7 Other                        8 [8. Specified as Libertarian candidate] 3
## 8 Other                        11 [11. Specified as don't know] 2
## 9 Other                        12 [12. Specified as refused] 16
## 10 <NA>                         -9 [-9. Refused] 53
## 11 <NA>                         -6 [-6. No post-election interview] 4
## 12 <NA>                         -1 [-1. Inapplicable] 1497
```

Code example - collapsing levels - fix

Recode V202073 as Biden, Trump, Other, and missing for unknown/no one

```
anes_vote <- anes_in %>%
  mutate(VotedPres2020_selection = factor(
    case_when(
      V202073 == 1 ~ "Biden",
      V202073 == 2 ~ "Trump",
      V202073 >= 3 & V202073 <= 8 ~ "Other",
      TRUE ~ NA_character_
    ),
    levels = c("Biden", "Trump", "Other")))
anes_vote %>% count(VotedPres2020_selection, V202073)
```

Code example - collapsing levels: output

```
## # A tibble: 12 x 3
##   VotedPres2020_selection      V202073     n
##   <fct>                      <dbl+lbl> <int>
## 1 Biden                       1 [1. Joe Biden]    3267
## 2 Trump                        2 [2. Donald Trump]   2462
## 3 Other                        3 [3. Jo Jorgensen]   69
## 4 Other                        4 [4. Howie Hawkins]  23
## 5 Other                        5 [5. Other candidate {SPECIFY}] 56
## 6 Other                        7 [7. Specified as Republican candidate] 1
## 7 Other                        8 [8. Specified as Libertarian candidate] 3
## 8 <NA>                         -9 [-9. Refused]    53
## 9 <NA>                          -6 [-6. No post-election interview] 4
## 10 <NA>                        -1 [-1. Inapplicable] 1497
## 11 <NA>                        11 [11. Specified as don't know] 2
## 12 <NA>                        12 [12. Specified as refused] 16
```

Code example - creating construct

- Creating poverty level indicator from household size and income for Durham County, NC
- Data source: 2019 1-year ACS microdata
- In NC (and most states), poverty guideline is as follows:

Persons in Household	Poverty guideline
1	\$12,490
2	\$16,910
3	\$21,330
4	\$25,750
5	\$30,170
6	\$34,590
7	\$39,010
8	\$43,430
9+	Add \$4,420 for each additional person

Code example - creating construct

NP is the number of persons in a household, HINCP is the household income

```
dat19_pov <- dat19_in %>%
  mutate(PovGuide=case_when(
    NP==1~12490,
    NP==2~16910,
    NP==3~21330,
    NP==4~25750,
    NP==5~30170,
    NP==6~34590,
    NP==7~39010,
    NP==8~43430,
    NP>=9~43430+(NP-8)*4420
  ),
  FPL=HINCP<=PovGuide
)

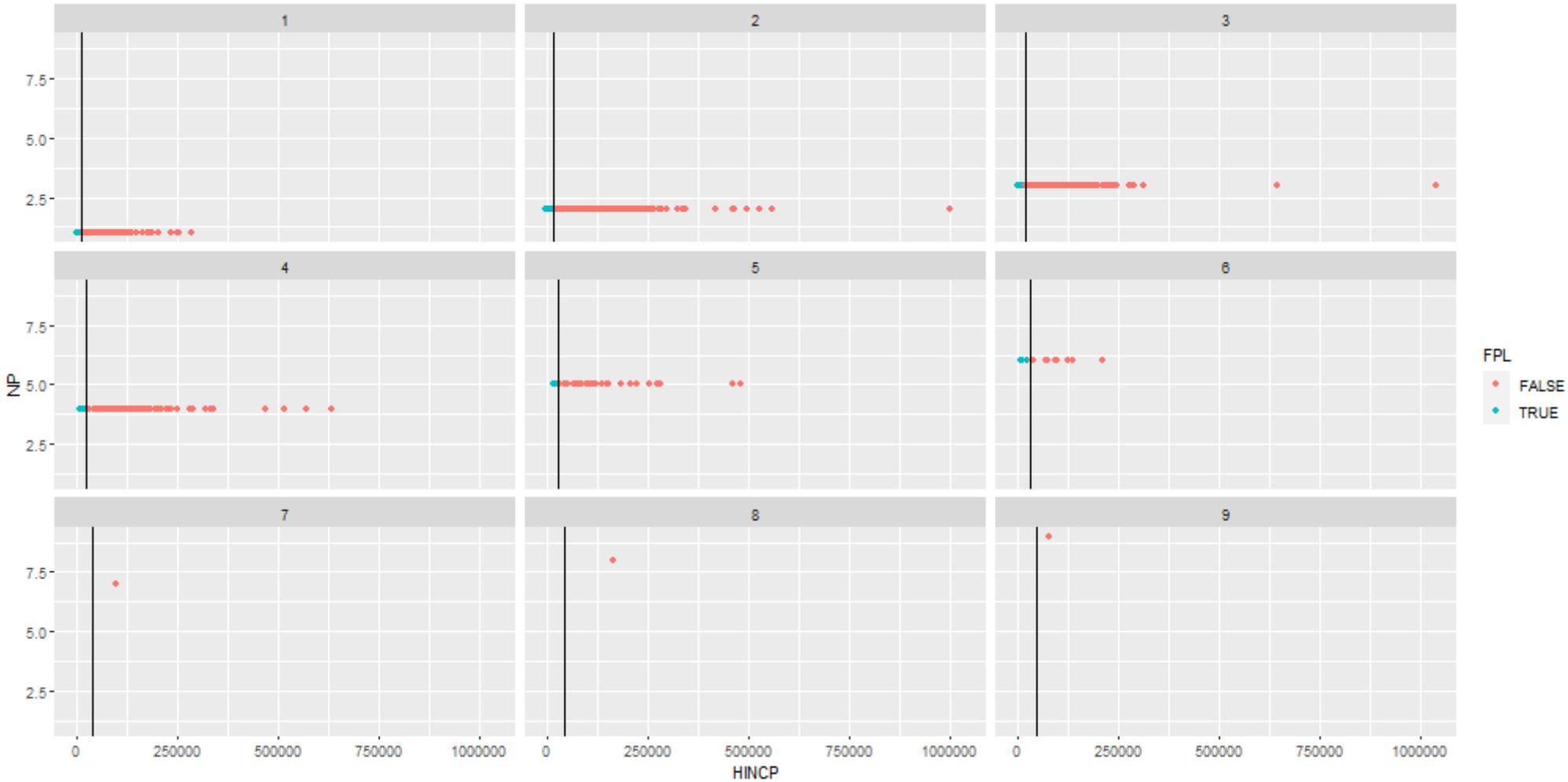
dat19_pov %>%
  count(NP, PovGuide)

p <- dat19_pov %>% ggplot(aes(x=HINCP, y=NP, colour=FPL)) +
  facet_wrap(~NP) + geom_point() + geom_vline(aes(xintercept=PovGuide))
```

Code example - creating construct: output

```
## # A tibble: 9 x 3
##       NP PovGuide     n
##   <dbl>    <dbl> <int>
## 1     1     12490    363
## 2     2     16910    367
## 3     3     21330    152
## 4     4     25750     96
## 5     5     30170     35
## 6     6     34590     13
## 7     7     39010      1
## 8     8     43430      1
## 9     9     47850      1
```

Code example - creating construct: output



Breakout rooms: Practice time

- Open DesignDerivedVariablesExercises.Rmd and work on Part 2
- We will take 15 minutes. Use this time for the exercises and questions.

Reproducible research

Reproducible research overview

Someone with the same data should be able to reproduce the same results

- Tools to help this
 - R projects
 - here package
 - R Markdown
- Processes to help this
 - Batching code
 - Be organized – create documentation and a clear folder structure
 - Version control

R projects and the here package

- R projects specify the root folder and other R options
- Stop doing this: `setwd("C:\Users\zimmers\Documents\tidy-survey-short-course")`
- here package makes relative paths easy: Relative from where .Rproj file is or current file (if no project)
- here package makes sure to create path correctly for OS (e.g. \ for Windows and / for Linux/Mac)
- Example

```
list.files(here())
```

```
## [1] "Codebooks"                 "Data"                      "DataCleaningScripts"  
## [4] "Exercises"                  "FinalizeMaterials.R"      "LICENSE"  
## [7] "Presentation"               "RawData"                   "README.md"  
## [10] "tidy-survey-short-course.Rproj" "xaringan-themer.css"
```

```
list.files(here("RawData", "RECS_2015"))
```

```
## [1] "2020_RECS-457A.pdf"       "codebook_publicv4.xlsx"    "microdata_v3.pdf"         "README.md"
```

R Markdown

- R Markdown combines R code with text
- Each time document is Knitted, a self-contained session is started.
 - Prevents problems with depending on something in your environment that aren't explicitly called out
- Knit to PDF, DOCX, HTML, PPTX, and more
- Don't copy/paste output to your manuscript/report. Make your manuscript/report with R Markdown
- Automatic table/figure numbering. If using Word, check out [officedown](#) and [officer](#)
- Can create parameterized reports. Example: run an analysis for each state and each state gets a report
- For beginners: <https://rmarkdown.rstudio.com/lesson-1.html>

Batching R code

OK, you want to stick with .R files. What can you do?

- [Compiling R Scripts](#)
 - In RStudio, use the Compile Report feature under File menu. Create output from your code and code runs in self-contained session
 - In code, use `rmarkdown::render(filename.R)`
 - Creates HTML, PDF, or Word document with your code, console output, and plots
- Batch from command line (Terminal)
 - Linux: `R CMD BATCH --no-save filename.R &`
 - Windows (something like): `"C:\Program Files\R\R-4.1.3\bin\R.exe CMD BATCH --no-save filename.R &`
 - Creates a .Rout file with your console output, timing information, and plots in PDFs (unless saved another way). .Rout file can be viewed in a text editor of your choice or Word

Documentation and organization

- Create a README file
- Set up folders in an easy to follow manner
- Example set-up

```
recs-analysis
└── Analysis
    ├── 01_ProcessData.Rmd
    ├── 01_ProcessData.html
    ├── 02_EDA.Rmd
    └── 02_EDA.html
└── Data
    └── Raw
        ├── codebook_publicv4.xlsx
        ├── microdata_v3.pdf
        └── recs2015_public_v4.csv
    └── Analysis
        └── recs.rds
README.md
recs-analysis.Rproj
```

Version control

- Version control is a process to track and manage changes in code
- Common method (and has integration with RStudio) is GitHub
- Document why you change analysis over time
- Collaborate with others
- Resource to **Git** started: <https://happygitwithr.com/>

Useful packages for tables

- [kableExtra](#): extends [kable](#) to allow piping for HTML and LaTeX
- [gt](#): from tibble/data.frame to nice looking tables for HTML, LaTeX, and RTF
- [gtsummary](#): `tbl_svysummary` creates tables of summary statistics from survey objects
- [flextable](#): tables for HTML, PDF, Word, and Powerpoint
- [huxtable](#): tables for LaTeX and HTML

Other useful packages

- [ggsurvey](#): plotting data from surveys
- [naniar](#): visualize missing data and see missing patterns
- [likert](#): analyze and visualize Likert type items
- and more [CRAN Task View: Official Statistics & Survey Statistics](#)

Closing

General questions

- Open floor for questions and discussion

Thank You!

We hope you learned a lot in this session!

Please let us know if you have any feedback on this workshop. All feedback is welcome!

- You will be receiving a follow-up survey to share feedback about course

Session info - platform

```
## setting value
## version R version 4.1.3 (2022-03-10)
## os       Windows 10 x64 (build 19042)
## system  x86_64, mingw32
## ui       RStudio
## language (EN)
## collate English_United States.1252
## ctype   English_United States.1252
## tz      America/New_York
## date    2022-04-14
## rstudio 2022.02.1+461 Prairie Trillium (desktop)
## pandoc  2.17.1.1 @ C:/Program Files/RStudio/bin/quarto/bin/ (via rmarkdown)
```

Session info - packages

```
##   package * version date (UTC) lib source
## dplyr      * 1.0.8   2022-02-08 [1] CRAN (R 4.1.2)
## DT         * 0.21    2022-02-26 [1] CRAN (R 4.1.3)
##forcats     * 0.5.1   2021-01-27 [1] CRAN (R 4.1.2)
## ggplot2     * 3.3.5   2021-06-25 [1] CRAN (R 4.1.2)
## here        * 1.0.1   2020-12-13 [1] CRAN (R 4.1.2)
## hexbin      * 1.28.2  2021-01-08 [1] CRAN (R 4.1.2)
## knitr       * 1.37    2021-12-16 [1] CRAN (R 4.1.2)
## Matrix      * 1.4-0   2021-12-08 [2] CRAN (R 4.1.3)
## palmerpenguins * 0.1.0  2020-07-23 [1] CRAN (R 4.1.2)
## purrr       * 0.3.4   2020-04-17 [1] CRAN (R 4.1.2)
## readr       * 2.1.2   2022-01-30 [1] CRAN (R 4.1.2)
## remotes     * 2.4.2   2021-11-30 [1] CRAN (R 4.1.2)
## scales      * 1.1.1   2020-05-11 [1] CRAN (R 4.1.2)
## srvyr       * 1.1.1   2022-02-20 [1] CRAN (R 4.1.3)
## stringr     * 1.4.0   2019-02-10 [1] CRAN (R 4.1.2)
## survey      * 4.2     2022-03-31 [1] Github (bschneidr/r-forge-survey-mirror@69c62ff)
## survival   * 3.2-13  2021-08-24 [2] CRAN (R 4.1.3)
## tibble      * 3.1.6   2021-11-07 [1] CRAN (R 4.1.2)
## tidycensus  * 1.1     2021-09-23 [1] CRAN (R 4.1.2)
## tidyverse    * 1.2.0   2022-02-01 [1] CRAN (R 4.1.2)
## tidyverse    * 1.3.1   2021-04-15 [1] CRAN (R 4.1.2)
## xaringan    * 0.23    2022-03-08 [1] CRAN (R 4.1.3)
```