

Package ‘ReGenesees’

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Type Package

Title R evolved Generalized software for sampling estimates and errors in surveys.

Description Design-Based and Model-Assisted analysis of complex sampling surveys. Multistage, stratified, clustered, unequally weighted survey designs. Horvitz-Thompson and Calibration Estimators. Variance Estimation for nonlinear smooth estimators by Taylor-series linearization. Estimates, standard errors, confidence intervals and design effects for: Totals, Means, absolute and relative Frequency Distributions (marginal, conditional and joint), Ratios and Quantiles. Automated Linearization of Complex Analytic Estimators. Estimates, standard errors, confidence intervals and design effects for user-defined analytic estimators. Estimates and sampling errors for subpopulations.

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Author Diego Zardetto

Maintainer Diego Zardetto <zardetto@istat.it>

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Imports stats

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Suggests MASS

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ReGenesees-package	<i>ReGenesees: a Package for Design-Based and Model-Assisted Analysis of Complex Sampling Surveys</i>
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Description

ReGenesees is an R package for design-based and model-assisted analysis of complex sampling surveys. It handles multistage, stratified, clustered, unequally weighted survey designs. Sampling variance estimation for nonlinear (smooth) estimators is obtained by Taylor-series linearization. Sampling variance estimation for multistage designs can be obtained both under the Ultimate Cluster approximation or by means of an actual multistage computation. Estimates, standard errors, confidence intervals and design effects are provided for: Totals, Means, absolute and relative Frequency Distributions (marginal, conditional and joint), Ratios and Quantiles (variance via the Woodruff method). ReGenesees also handles Complex Estimators, i.e. any user-defined estimator that can be expressed as an analytic function of Horvitz-Thompson or Calibration estimators of Totals or Means, by automatically linearizing them. All analyses above can be carried out for arbitrary sub-populations.

The **ReGenesees** *package* is the fundamental building block of a full-fledged R-based software *system*: the **ReGenesees System**. The latter has a clear-cut two-layer architecture. The application layer of the system is embedded into package **ReGenesees**. A second R package, called **ReGenesees.GUI**, implements the presentation layer of the system, namely a user-friendly Tcl/Tk GUI.

A Quick Reading Guide to the Reference Manual

This reference manual reports a documentation entry for each (user visible) function of package **ReGenesees**. As you may have noticed by reading page 1, these documentation entries are automatically sorted according to the alphabetic ordering of the names of the functions. Such an ordering doesn't provide any clue about where should a user start reading, nor on the best way to proceed further.

In section 'Table of Contents', I tried to cluster the topics documented in the reference manual into four broad groups, based on both the statistical goals and on the software design of the underlying functions.

Moreover, I provided a *relevance code* for each documented topic/function. The meaning of such codes, along with the corresponding *reading suggestions*, are reported in the following table:

Relevance Codes Legend

CODE	RELEVANCE	READING SUGGESTION
***	Very Important.....	Read these topics as soon as possible. A clear understanding of these functions is mandatory in order to start using profitably the package.
**	Important.....	Read these topics once you have been experiencing for a while with (at least some of) the 'Very Important' functions.
*	Useful.....	These functions are ancillary (albeit in different ways) to the 'Very Important' and 'Important' ones (and their usage is generally simpler).
.	Advanced.....	These topics are very relevant but, unfortunately quite difficult. As they involve technical details, you should postpone their reading until you become familiar with the package.

TABLE OF CONTENTS**Survey Design:**

***	e.svydesign.....	Specification of a Complex Survey Design
*	weights.....	Retrieve Sampling Units Weights
**	collapse.strata.....	Collapse Strata Technique for Eliminating Lonely PSUs
*	des.addvars.....	Add Variables to Design Objects

Calibration:

**	pop.template.....	Template Data Frame for Known Population Totals
*	population.check.....	Compliance Test for Known Totals Data Frames
**	fill.template.....	Fill the Known Totals Template for a Calibration Task
*	bounds.hint.....	A Hint for Range Restricted Calibration
***	e.calibrate.....	Calibration of Survey Weights
*	check.cal.....	Calibration Convergence Check
*	g.range.....	Range of g-Weights
.	contrasts.RG.....	Set, Reset or Switch Off Contrasts for Calibration Models
.	%into%.....	Compress Nested Factors

Estimates and Sampling Errors:

***	svystatTM.....	Estimation of Totals and Means in Subpopulations
***	svystatR.....	Estimation of Ratios in Subpopulations
***	svystatQ.....	Estimation of Quantiles in Subpopulations
***	svystatL.....	Estimation of Complex Estimators in Subpopulations
**	aux.estimates.....	Quick Estimates of Auxiliary Variables Totals
*	write.svystat.....	Export Survey Statistics

```
* extractors.....Extractor Functions for Variability Statistics
. ReGenesees.options...Variance Estimation Options for the ReGenesees
  Package
```

Data Sets:

```
** example.....Artificial Household Survey Data
** fpcdat.....A Small But Not Trivial Artificial Sample
               Data Set
** sbs.....Artificial Structural Business Statistics Data
```

The ordering of the above ‘Table of Contents’ reflects only loosely the procedural sequence in which functions could be used. For instance, while you cannot apply function [e.calibrate](#) unless you have previously built a design object by using [e.svydesign](#), you can exploit, e.g., function [collapse.strata](#) also after calibration. As a further example, all functions in group ‘Estimates and Sampling Errors’ can be used on objects created by [e.svydesign](#) (yielding estimates and sampling errors for functions of Horvitz-Thompson estimators), as well as on objects created by [e.calibrate](#) (yielding estimates and sampling errors for functions of Calibration estimators).

aux.estimate

Quick Estimates of Auxiliary Variables Totals

Description

Quickly estimates the totals of the auxiliary variables of a calibration model.

Usage

```
aux.estimate(design,
             calmodel = if (inherits(template, "pop.totals"))
                           attr(template, "calmodel"),
             partition = if (inherits(template, "pop.totals"))
                           attr(template, "partition") else FALSE,
             template = NULL)
```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
calmodel	Formula defining the linear structure of the calibration model.
partition	Formula specifying the variables that define the "calibration domains" for the model (see ‘Details’); <code>FALSE</code> (the default) implies no calibration domains.
template	An object of class <code>pop.totals</code> , be it a template or the actual known totals data frame for the calibration task.

Details

The main purpose of function `aux.estimate` is to make easy the task of estimating the totals of *all* the auxiliary variables involved in a calibration model (separately inside distinct calibration domains, if specified). Even if such totals can be estimated also by repeatedly invoking function `svyestat`, this may reveal very tricky in practice, because real-world calibration tasks (e.g. in the field of Official Statistics) can simultaneously involve several hundreds of auxiliary variables. Moreover, total estimates provided by function `svyestat` are always complemented by sampling errors, whose estimation is very computationally demanding.

Function `aux.estimate`, on the contrary, *only* provides estimates of totals (i.e. without associated sampling errors), thus being very quick to be executed. Moreover, `aux.estimate` is able to compute, *in just a single shot*, all the totals of the auxiliary variables of a calibration model, no matter how complex the model is. Lastly, as a third strong point, the totals estimated by `aux.estimate` will be returned exactly in the same *standard format* in which the known population totals for the related calibration task need to be represented (see `pop.template`, `population.check`, `fill.template`).

It may be useful to point out that, besides having been designed to handle auxiliary variables involved in calibration models, function `aux.estimate` could be also used for computing *general* estimates of totals inside subpopulations in a very effective way (see 'Examples').

Value

An object of class `pop.totals`, thus inheriting from class `data.frame` storing the estimated totals in a standard format.

Author(s)

Diego Zardetto

See Also

`e.svydesign` to bind survey data and sampling design metadata, `svyestat` for calculating estimates and standard errors of totals, `e.calibrate` for calibrating weights, `pop.template` for constructing known totals data frames in compliance with the standard required by `e.calibrate`, `population.check` to check that the known totals data frame satisfies that standard, `fill.template` to automatically fill the template when a sampling frame is available.

Examples

```
# Load sbs data:
data(sbs)

# Build a design object:
sbsdes<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,fpc=~fpc)

# Now suppose you have to perform a calibration process which
# exploits as auxiliary information:
# i) the total number of employees (emp.num)
#    by class of number of employees (emp.cl) crossed with nace.macro;
# ii) the total number of enterprises (ent)
#     by region crossed with nace.macro;

# Build a template for the known totals:
pop<-pop.template(sbsdes,
```

```

    calmodel=~emp.num:emp.cl + region -1,
    partition=~nace.macro)

# Use the fill.template function to automatically compute
# the totals from the universe (sbs.frame) and safely fill
# the template:
pop<-fill.template(sbs.frame,template=pop)
pop

# You can now use aux.estimated to verify how much difference
# exists between the target totals and the initial HT estimates:
aux.HT<-aux.estimated(sbsdes,template=pop)
aux.HT

# If you calibrate, ...
sbscal<-e.calibrate(sbsdes,pop)

# ... you can verify that CAL estimates exactly match the known totals:
aux.CAL<-aux.estimated(sbscal,template=pop)
aux.CAL

# Recall that you can also use aux.estimated for computing
# general estimates of totals inside subpopulations (even
# not related to any calibration task).
# E.g. estimate the total of value added inside areas:
aux.estimated(sbsdes,~va.imp2-1,~area)

# ...and compare to svstatTM (notice also
# the increased execution time):
svstatTM(sbsdes,~va.imp2,~area)

```

bounds.hint

A Hint for Range Restricted Calibration

Description

Suggests a sound bounds value for which `e.calibrate` is likely to converge.

Usage

```

bounds.hint(design, df.population,
            calmodel = if (inherits(df.population, "pop.totals"))
                          attr(df.population, "calmodel"),
            partition = if (inherits(df.population, "pop.totals"))
                          attr(df.population, "partition") else FALSE,
            msg = TRUE)

```

Arguments

<code>design</code>	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
<code>df.population</code>	Data frame containing the known population totals for the auxiliary variables.
<code>calmodel</code>	Formula defining the linear structure of the calibration model.

partition	Formula specifying the variables that define the "calibration domains" for the model; FALSE (the default) implies no calibration domains.
msg	Enables printing of a summary description of the result (default is TRUE).

Details

The function `bounds.hint` returns a bounds value for which `e.calibrate` is *likely* to converge. This interval is just a sound hint, *not* an exact result (see 'Note').

The mandatory argument `design` identifies the analytic object on which the calibration problem is defined.

The mandatory argument `df.population` identifies the known totals data frame.

The argument `calmodel` symbolically defines the calibration model you want to use: it identifies the auxiliary variables and the constraints for the calibration problem. The design variables referenced by `calmodel` must be numeric or factor and must not contain any missing value (NA). The argument can be omitted provided `df.population` is an object of class `pop.totals` (see [population.check](#)).

The optional argument `partition` specifies the variables that define the calibration domains for the model. The default value (FALSE) means either that there are not calibration domains or that you want to solve the problem globally (even though it could be factorized). The design variables referenced by `partition` (if any) must be factor and must not contain any missing value (NA). The argument can be omitted provided `df.population` is an object of class `pop.totals` (see [population.check](#)).

The optional argument `msg` enables/disables printing of a summary description of the achieved result.

Value

A numeric vector of length 2, representing the *suggested* value for the bounds argument of `e.calibrate`. The attributes of that vector store additional information, which can lead to better understand why a given calibration problem is (un)feasible (see 'Examples').

Note

Assessing the feasibility of an arbitrary calibration problem is not an easy task. The problem is even more difficult whenever additional "*range restrictions*" are imposed. Indeed, even if one assumes that the calibration constraints define a consistent system, one also has to choose the bounds such that the feasible region is non-empty.

One can argue that there must exist a minimum-length interval $I = [L, U]$ such that, if it is covered by bounds, the specified calibration problem is feasible. Unfortunately in order to compute exactly that minimum-length interval I one should solve a big linear programming problem [Vanderhoeft 01]. As an alternative, a trial and error procedure has been frequently proposed [Deville et al 1993; Sautory 1993]: (i) start with a very large interval `bounds.0`; (ii) if convergence is achieved, shrink it so as to obtain a new interval `bounds.1`; (iii) repeat until you get a sufficiently tight feasible interval `bounds.n`. The drawback is that this procedure can cost a lot of computer time since, for each choice of the bounds, the full calibration problem has to be solved.

A rather easy task is, on the contrary, the one of finding at least a given specific interval $I^* = [L^*, U^*]$ such that, if it is *not* covered by bounds, the current calibration problem is *surely unfeasible*. This means that any feasible bounds value must necessarily contain the I^* interval. The function `bounds.hint`: (i) first identifies such an I^* interval (by computing the range of the ratios between known population totals and corresponding direct Horvitz-Thompson estimates), (ii) then builds a new interval I^{sugg} with same midpoint and double length. The latter is the *suggested* value

for the bounds argument of `e.calibrate`. The return value of `bounds.hint` should be understood as a useful starting guess for bounds, even though there is definitely no warranty that the calibration algorithm will actually converge.

Author(s)

Diego Zardetto

References

Vanderhoeft, C. (2001) *"Generalized Calibration at Statistic Belgium"*, Statistics Belgium Working Paper n. 3, http://www.statbel.fgov.be/studies/paper03_en.asp.

Deville, J.C., Sarndal, C.E. and Sautory, O. (1993) *"Generalized Raking Procedures in Survey Sampling"*, Journal of the American Statistical Association, Vol. 88, No. 423, pp.1013-1020.

Sautory, O. (1993) *"La macro CALMAR: Redressement d'un Echantillon par Calage sur Marges"*, Document de travail de la Direction des Statistiques Demographiques et Sociales, no. F9310.

See Also

`e.calibrate` for calibrating weights, `pop.template` for constructing known totals data frames in compliance with the standard required by `e.calibrate`, `population.check` to check that the known totals data frame satisfies that standard and `g.range` to compute the range of the obtained g-weights.

Examples

```
# Creation of the object to be calibrated:
data(data.examples)
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Calibration (iterative solution) on the marginal distribution
# of age in 5 classes (age5c) inside provinces (procod)
# (totals in pop06p). Get a hint for feasible bounds:
hint<-bounds.hint(des,pop06p,~age5c-1,~procod)

# Let's verify if calibration converges with the suggested
# value for the bounds argument (i.e. c(0.219, 1.786) ):
descal06p<-e.calibrate(design=des,df.population=pop06p,
  calmodel=~age5c-1,partition=~procod,calfun="logit",
  bounds=hint,aggregate.stage=2)

# Now let's verify that calibration fails, if bounds don't cover
# the interval [0.611, 1.394]:
## Not run:
descal06p<-e.calibrate(design=des,df.population=pop06p,
  calmodel=~age5c-1,partition=~procod,calfun="logit",
  bounds=c(0.62,1.50),aggregate.stage=2,force=FALSE)

## End(Not run)
# The warning message raised by e.calibrate tells that
# the population total of variable age5c5 (i.e. the fifth
# age class frequency) was not matched.

# By analysing ecal.status one understands that calibration
```



```
# failed due to the sub-task identified by procod 30:
ecal.status

# this is easily explained by inspecting the "bounds"
# attribute of the bounds.hint output object:
attr(hint,"bounds")

# indeed the specified lower bound (0.62) was too high
# for procod 30, where instead a value ~0.61 was required.

# Recall that you can always "force" a calibration task that
# would not converge:
descal06p.forced<-e.calibrate(design=des,df.population=pop06p,
                             calmodel=~age5c-1,partition=~procod,calfun="logit",
                             bounds=c(0.62,1.50),aggregate.stage=2,force=TRUE)

# Notice, also, that forced sub-tasks can be tracked down by
# looking at ecal.status:
ecal.status
```

check.cal

*Calibration Convergence Check***Description**

Checks whether Calibration Constraints are fulfilled; if not, assesses constraints violation degree.

Usage

```
check.cal(cal.design)
```

Arguments

cal.design Object of class cal.analytic.

Details

The function verifies if all the imposed Calibration Constraints are actually fulfilled by object cal.design. If it is not the case, the function evaluates the degree of violation of the constraints and prints a summary of the mismatches between population totals and achieved estimates (see also Section 'Calibration process diagnostics' in the help page of [e.calibrate](#)).

Value

The main purpose of the function is to print on screen; anyway a list is invisibly returned, which summarizes the results of the check.

Author(s)

Diego Zardetto

See Also

[e.calibrate](#) for calibrating weights.

Examples

```
# Load sbs data:
data(sbs)

# Build a design object:
sbsdes<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,fpc=~fpc)

## Example 1
# Build template...
pop<-pop.template(sbsdes,~emp.num:emp.cl+ent-1,~region)
# Fill template...
pop<-fill.template(sbs.frame,pop)
# Calibrate...
sbscal<-e.calibrate(sbsdes,pop,sigma2=~emp.num)
# Check calibration...
check.cal(sbscal)

## Example 2
# Build template...
pop<-pop.template(sbsdes,~emp.num+ent-1,~area)
# Fill template...
pop<-fill.template(sbs.frame,pop)
# Calibrate with tight bounds...
sbscal<-e.calibrate(sbsdes,pop,sigma2=~emp.num,bounds=c(0.8,1.2))
# Check calibration...
check.cal(sbscal)

# Now try to calibrate with suggested bounds...
hint <- bounds.hint(sbsdes,pop)
sbscal<-e.calibrate(sbsdes,pop,sigma2=~emp.num,bounds=hint)
# Check calibration...
check.cal(sbscal)
```

collapse.strata

Collapse Strata Technique for Eliminating Lonely PSUs

Description

Modifies a stratified design containing lonely PSUs by collapsing its design strata into superstrata.

Usage

```
collapse.strata(design, block.vars = NULL, sim.score = NULL)
```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
block.vars	Formula specifying blocking variables: only strata belonging to the same block will be aggregated (see 'Details'). If <code>NULL</code> (the default option) no constraints will be imposed.
sim.score	Formula specifying a similarity score for strata: lonely strata will be paired with the most similar stratum in each block (see 'Details'). If <code>NULL</code> (the default option) random pairs will be formed.

Details

Lonely PSUs (i.e. PSUs which are alone inside a not self-representing stratum) are a concern from the viewpoint of variance estimation. As a general solution, the **ReGeneseees** package can handle the lonely PSUs problem by setting proper variance estimation options (see [ReGeneseees.options](#)). The `collapse.strata` function implements a widely used alternative: the so called collapsed strata technique. The basic idea is to build artificial "*superstrata*" by aggregating strata containing lonely PSUs to other strata, and then to use such superstrata for variance estimation (see e.g. [Wolter 85] and [Rust, Kalton 87]).

The optional argument `block.vars` identifies "*blocking variables*" that can be used to constrain the way lonely strata are collapsed to form superstrata. More specifically: first, blocking variables are used to partition sample data in "*blocks*" via factor crossing, then, only lonely strata belonging to the same block are aggregated. If `block.vars=NULL` (the default option), no constraint will act on collapsing. The design variables referenced by `block.vars` (if any) should be of type factor. Errors will be raised if (i) blocks cut across strata, or (ii) `block.vars` generate any non-aggregable strata (i.e. lonely strata which are a singleton inside a block).

The optional argument `sim.score` can be used to specify a similarity score for strata aggregation. This means that each lonely stratum will be collapsed with the stratum that has the most similar value of variable `sim.score` inside the block. Thus the similarity of two strata is actually measured by the (absolute value of the) difference among the corresponding `sim.score` values. Only one design variable can be referenced by the `sim.score` formula: (i) it must be of type numeric, (ii) it must be constant inside each stratum, and (iii) it should be positive (otherwise its `abs()` will be silently used). Note that if no similarity score is specified (i.e. `sim.score=NULL`), the achieved strata aggregation will depend on the ordering of input sample data in design.

The collapsing algorithm will, whenever possible, build superstrata by pairing a lonely stratum to another not-yet-aggregated stratum. Therefore, in general, superstrata will contain only two design strata. Rare exceptions can arise, e.g. due to constraints, with at most three design strata inside a superstratum. The choice to collapse strata in pairs has been taken because it is known to be appropriate for large-scale surveys with many strata (at least for national level estimates, see e.g. [Rust, Kalton 87]).

The `collapse.strata` function handles correctly finite population corrections. If design has been built by passing strata sampling fractions via the `fpc` argument, the function re-computes sampling fractions inside superstrata by exploiting the achieved mapping of strata to superstrata and the `fpc` slot of design.

Value

An object of the same class as `design`, without strata containing lonely PSUs.

Strata Collapse Process Diagnostics

As already observed in the 'Details' Section, there are three non trivial reasons why function `collapse.strata` can run into errors: (1) the blocks cut across strata, (2) some blocks contain a stratum needing to be aggregated while this stratum happens to be the only one inside the block, (3) the similarity score for strata aggregation varies inside strata. In order to help the user to identify such data anomalies, hence taking a step forward to eliminate them, every call to `collapse.strata` generates, by side effect, a diagnostics data structure named `clps.strata.status` into the `.GlobalEnv` (see 'Examples').

The `clps.strata.status` list has three components: the first reports the error message, the second stores a vector identifying the data subsets that have been hit by the anomaly, the third reports the call to `collapse.strata` that generated the list. For instance, when error condition (1) holds, the second element of `clps.strata.status` identifies the strata that are cut by blocks; if, instead, error

condition (2) holds, the second element of the list identifies the blocks containing non-aggregable strata.

It must be stressed that *every call* to `collapse.strata` generates the `clps.strata.status` list, *even* when the strata collapsing process ends *successfully*. In such cases, the first element of the list reports the number of lonely strata that have undergone aggregation, whereas the second is a useful dataframe (named `clps.table`) mapping collapsed strata to superstrata. To be more specific: each row of `clps.table` identifies a stratum that has been mapped to a superstratum, while the columns of `clps.table` give: (i) the block to which the stratum belongs, (ii) the stratum name, (iii) a flag indicating if the stratum was lonely or not, (iv) the name of the superstratum to which it has been mapped.

Methodological Warning

A warning must be emphasized: strata similarity score `sim.score` should be based on prior knowledge and/or on expectations on *true* values of stratum means for the variable(s) to be estimated, not on current sample data. Indeed, building `sim.score` by estimating stratum means with the current sample can lead to severe *underestimation* of sampling variance, i.e. to too tight confidence intervals.

Author(s)

Diego Zardetto

References

- Wolter, K.M. (1985) *"Introduction to Variance Estimation"*, Springer-Verlag, New York.
- Rust, K., Kalton, G. (1987) *"Strategies for Collapsing Strata for Variance Estimation"*, Journal of Official Statistics, Vol. 3, No. 1, pp. 69-81.

See Also

[ReGenesees.options](#) for a different way to handle the lonely PSUs problem (namely by setting variance estimation options).

Examples

```
# Build a survey design with lonely PSU strata:
data(data.examples)
exdes <- e.svydesign(data= example, ids= ~ towcod+famcod,
                   strata= ~ stratum, weights= ~ weight)
exdes

# Explore 3 possible collapsing strategies:
# 1) Aggregate lonely strata by forming random pairs
exdes.clps1 <- collapse.strata(exdes)
exdes.clps1

# 2) Aggregate lonely strata in pairs under constraints:
#   i. aggregated strata must be both not self-representing
#   ii. aggregated strata must belong to the same province (which
#       is appropriate if e.g. provinces are planned estimation domains)
exdes.clps2 <- collapse.strata(exdes, ~sr:procod)
exdes.clps2

# 3) A WRONG strategy: compute strata similarity score by using
```

```

# sample estimates of the interest variable (y1) inside strata:
old.op <- options("RG.lonely.psu"="remove")
stat.score <- svystatTM(design= exdes, ~y1, by= ~ stratum)
options(old.op)
exdes2 <- des.addvars(exdes,
                      sim.score= sapply(stratum, function(str)
                                         stat.score[stat.score[, "stratum"]==str, 2]))
exdes.clps3 <- collapse.strata(exdes2, ~sr:procod, ~sim.score)
exdes.clps3

# Compute total estimates of y1 at the province level
# for all 3 designs with collapsed strata:
stat.clps1 <- svystatTM(design= exdes.clps1, y= ~ y1, by= ~ procod,
                      estimator= "Total", vartype= "cvpct")
stat.clps2 <- svystatTM(design= exdes.clps2, y= ~ y1, by= ~ procod,
                      estimator= "Total", vartype= "cvpct")
stat.clps3 <- svystatTM(design= exdes.clps3, y= ~ y1, by= ~ procod,
                      estimator= "Total", vartype= "cvpct")

# Compute the same estimates by using two alternatives
# to handle lonely PSUs:
# "adjust" option
old.op <- options("RG.lonely.psu"="adjust")
stat.adj <- svystatTM(design= exdes, y= ~ y1, by= ~ procod,
                    estimator= "Total", vartype= "cvpct")
options(old.op)
# "average" option
old.op <- options("RG.lonely.psu"="average")
stat.ave <- svystatTM(design= exdes, y= ~ y1, by= ~ procod,
                    estimator= "Total", vartype= "cvpct")
options(old.op)

# Lastly, compare achieved estimates for CV percentages:
stat.clps1
stat.clps2
stat.clps3
stat.adj
stat.ave

# Thus the qualitative features are as expected: the "adjust" option
# tends to give conservative sampling variance estimates, the WRONG collapsing
# strategy 3) tends to underestimate sampling variance, while other methods
# give results in-between those extrema.

# Few examples to inspect the clps.strata.status list generated
# for diagnostics purposes:
# 1) Ill defined blocks: cutting across strata:
## Not run:
clps.err1 <- collapse.strata(exdes, ~sex)

## End(Not run)
clps.strata.status

# 2) Ill defined blocks: generating non-aggregable strata
## Not run:
clps.err2 <- collapse.strata(exdes, ~regcod:stratum)

```

```
## End(Not run)
clps.strata.status

# 3) Successful collapsing: explore strata to superstrata mapping
exdes.ok <- collapse.strata(exdes, ~sr:regcod:procod)
clps.strata.status
```

contrasts.RG

Set, Reset or Switch Off Contrasts for Calibration Models

Description

These functions control the way **ReGenesees** translates a symbolic calibration model (as specified by the `calmodel` formula in `e.calibrate`, `pop.template`, `fill.template`, `aux.estimate`s, ...) to its numeric encoding (i.e. the model-matrix used by the internal algorithms to perform actual computations).

Usage

```
contrasts.RG()
contrasts.off()
contrasts.reset()
contr.off(n, base = 1, contrasts = TRUE, sparse = FALSE)
```

Arguments

<code>n</code>	Formally as in function <code>contr.treatment</code> (See 'Details').
<code>base</code>	Formally as in function <code>contr.treatment</code> (See 'Details').
<code>contrasts</code>	Fictitious, but formally as in function <code>contr.treatment</code> . (See 'Details')
<code>sparse</code>	Formally as in function <code>contr.treatment</code> . (See 'Details')

Details

All the calibration facilities in package **ReGenesees** transform symbolic calibration models (as specified by the user via `calmodel`) into numeric model-matrices. Factor variables occurring in `calmodel` play a special role in such transformations, as the encoding of a factor can (and, by default, do) *depend* on the *structure* of the formula in which it occurs. The **ReGenesees** functions documented below control the way factor levels are translated into auxiliary variables and mapped to columns of population totals dataframes. The underlying technical tools are `contrasts` handling functions (see Section 'Technical Remarks and Warnings' for further details).

Under the calibration perspective, ordered and unordered factors appearing in `calmodel` must be treated the same way. This obvious constraint defines the **ReGenesees** default for contrasts handling. Such a default is silently set when loading the package. Moreover, you can set it also by calling `contrasts.RG()`. As can be understood by reading Section 'Technical Remarks and Warnings' below, the default setup can be seen as “**efficient-but-slightly-risky**”.

A call to `contrasts.off()` simply disables all contrasts and imposes a complete dummy coding of factors. Under this setup, all levels of factors occurring in `calmodel` generate a distinct model-matrix column, *even if some of these columns can be linearly dependent*. To be very concise, the `contrasts.off()` setup can be seen as “**safe-but-less-efficient**” as compared to the default one (read Section 'Technical Remarks and Warnings' for more details).

Function `contr.off` is not meant to be called directly by users: it serves only the purpose of enabling the `contrasts.off()` setup.

A call to `contrasts.reset()` restores R factory-fresh defaults for contrasts (which do distinguish ordered and unordered factors). Users may want to use this function after having completed a **ReGenesees** session, e.g. before switching to other R functions relying on contrasts (such as `lm`, `glm`, ...).

Technical Remarks and Warnings

“[...] the corner cases of `model.matrix` and friends is some of the more impenetrable code in the R sources.”

Peter Dalgaard

Contrasts handling functions tell R how to encode the model-matrix associated to a given model-formula on specific data (see, e.g., `contr.treatment`, `contrasts`, `model.matrix`, `formula`, and references therein). More specifically, contrasts control the way factor-terms and interaction-terms occurring in formulae get actually represented in the model matrix. For instance, R (by default) avoids the complete dummy coding of a factor whenever it is able to understand, on the basis of the structure of the model-formula, that some of the factor levels would generate linearly dependent (i.e. redundant) columns in the model-matrix (see Section ‘Examples’).

The usage of contrasts to build smaller, full-rank calibration model-matrices would be a good opportunity for *ReGenesees*, provided it comes *without any information loss*. Indeed, smaller model-matrices mean less population totals to be provided by users, and higher efficiency in computations.

Unfortunately, few controversial cases have been signaled in which R ability to “simplify” a model-matrix on the basis of the structure of the related model-formula seems to lead to strange, unexpected results (see, e.g., [this R-help thread](#)). No matter whether such R behaviour is or not an actual bug with respect to its impact on R linear model fitting or ANOVA facilities, it surely represents a concern for **ReGenesees** with respect to calibration (see Section ‘Examples’). The risk is the following: there could be rare cases in which exploiting R contrasts handling functions inside **ReGenesees** ends up with a *wrong* (i.e. incomplete) population totals template, and (eventually) with *wrong* calibration results.

Though one could adopt several ad-hoc countermeasures to sterilize the risk described above while still taking advantage of contrasts (see Section ‘Examples’), the choice of completely disabling contrasts via `contrasts.off()` would result in a **100% safety guarantee**. If computational efficiency is not a serious concern for you, switching off contrasts may determine the best **ReGenesees** setup for your analyses.

Author(s)

Diego Zardetto

References

Chambers, J. M. and Hastie, T. J. (1992) *Statistical models*. Chapter 2 of *Statistical Models in S* eds J. M. Chambers and T. J. Hastie, Wadsworth & Brooks/Cole.

["Why does the order of terms in a formula translate into different models/model matrices?"](#), R-help thread.

See Also

[e.calibrate](#), [pop.template](#), [fill.template](#), and [aux.estimates](#) for the meaning and the usage of calmodel in **ReGenesees**. [formula](#), [model.matrix](#), [contrasts](#), and [contr.treatment](#) to understand the role of contrasts in R.

Examples

```
#####
# Easy things first: #
#####

# 1) When ReGenesees is loaded, its standard way of handling contrasts
#     (i.e. no ordered-unordered factor distinction) is silently set:
options("contrasts")

# 2) To switch off contrasts (i.e. apply always dummy coding to factors),
#     simply type:
contrasts.off()

# 3) To restore R factory-fresh defaults for contrasts, simply type:
contrasts.reset()

# 4) To switch on again standard ReGenesees contrasts, simply type:
contrasts.RG()

#####
# A simple calibration example to understand the effects of #
# switching off contrasts.                                     #
#####

# Load sbs data:
data(sbs)

# Create a design object:
sbsdes<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,fpc=~fpc)

# Suppose you want to calibrate on the marginals of 'region' (a factor
# with 3 levels: "North", "Center", and "South") and 'dom3' (a factor
# with 4 levels: "A", "B", "C", and "D").
# Let's see how things go under the 'contrast on' (default) and 'contrasts off'
# setups:

#####
# 1) ReGenesees default: contrasts ON #
#####
# As you see contrasts are ON:
options("contrasts")

# Build and fill the population totals template:
temp1<-pop.template(data=sbsdes,calmodel=~region+dom3-1)
pop1<-fill.template(universe=sbs.frame,template=temp1)

# Now inspect the obtained known totals data.frame:
pop1
```



```

# As you see: (i) it has only 6 columns, and (ii) the "A" level of
# factor 'dom3' is missing. This is because contrasts are ON, so that
# R is able to understand that only 6 out of the 3 + 4 marginal counts
# are actually independent. Indeed, the "A" counts...
sum(sbs.frame$dom3=="A")

# ...are actually redundant, since they can be deduced by pop1:
sum(pop1[,1:3])~sum(pop1[,4:6])

# Now calibrate:
cal1<-e.calibrate(sbsdes,pop1)

#####
# 2) Switch OFF contrasts: dummy coding for all! #
#####
# To switch off contrasts simply call:
contrasts.off()

# Build and fill the population totals template:
temp2<-pop.template(data=sbsdes,calmodel=~region+dom3-1)
pop2<-fill.template(universe=sbs.frame,template=temp2)

# Now inspect the obtained known totals data.frame:
pop2

# As you see: (1) it has now 7 columns, and (2) the "A" level of factor
# 'dom3' has been resurrected. This is because contrasts are OFF,
# so that each level of factors in calmodel are coded to dummies.

# Now calibrate. Since only 6 out of 7 dummy auxiliary variables are
# actually independent, the model.matrix computed by e.calibrate will not be
# full-rank. As a consequence, e.calibrate would use the Moore-Penrose
# generalized inverse (in practice, this could depend on the machine R
# is running on):
cal2<-e.calibrate(sbsdes,pop2)

# Compare the calibration weights generated under setups 1) and 2):
all.equal(weights(cal2),weights(cal1))

# Lastly set back contrasts to ReGenesees default:
contrasts.RG()

#####
# Weird results, risks and countermeasures. #
# ("When the going gets tough...")          #
#####

# Suppose you want to calibrate on: (A) the joint distribution of 'region' (a
# factor with 3 levels: "North", "Center", and "South") and 'nace.macro' (a
# factor with 4 levels: "Agriculture", "Industry", "Commerce", and "Services")
# and, at the same time, on (B) the total number of employees ('emp.num', a
# numeric variable) by 'nace.macro'.
#
# You rightly expect that 3*4 + 4 = 16 population totals are needed for such a
# calibration task. Indeed, knowing the enterprise counts for the 3*4 cells of

```

```

# the joint distribution (A) doesn't tell anything on the number of employees
# working in the 4 nace macrosectors (B), and vice-versa.
#
# Moreover, you might expect that calibration models:
# (i) calmodel = ~region:nace.macro + emp.num:nace.macro - 1
# (ii) calmodel = ~emp.num:nace.macro + region:nace.macro - 1
#
# should produce the same results.
# Unfortunately, WHEN CONTRASTS ARE ON, this is not the case: only model (i)
# leads to the expected, right results. Let's see.

#####
# A strange result when contrasts are ON: #
# the order of terms in calmodel matters! #
#####
# As you see contrasts are ON:
options("contrasts")

# Start with (i) calmodel = ~region:nace.macro + emp.num:nace.macro - 1
# Build and fill the population totals template:
temp1<-pop.template(data=sbsdes,~region:nace.macro+emp.num:nace.macro-1)
pop1<-fill.template(universe=sbs.frame,template=temp1)

# Now inspect the obtained known totals data.frame:
pop1

# and verify it stores the right, expected number of totals (i.e. 16):
dim(pop1)

# Now calibrate:
cal1<-e.calibrate(sbsdes,pop1)

# Now compare with (ii) calmodel = ~emp.num:nace.macro + region:nace.macro - 1
# Build and fill the population totals template:
temp2<-pop.template(data=sbsdes,~emp.num:nace.macro+region:nace.macro-1)
pop2<-fill.template(universe=sbs.frame,template=temp2)

# First check if it stores the right, expected number of totals (i.e. 16):
dim(pop2)

# Apparently 4 totals are missing; let's inspect the known totals data.frame
# to understand which ones:
pop2

# Thus we are missing the 4 'nace.macro' totals for 'region' level "North".
# Everything goes as if R contrasts functions mistakenly treated the term
# emp.num:nace.macro as a factor-factor interaction (i.e. a 2 way joint
# distribution), which would have justified to eliminate the 4 missing totals
# as redundant.

# Notice that calibrating on pop2 would generate wrong results...
cal2<-e.calibrate(sbsdes,pop2)

# ...indeed the 4 estimates of 'nace.macro' for 'region' level "North" are not
# actually calibrated (look at the magnitude of SE estimates):
svstatTM(cal2,~region,~nace.macro)

```

```
#####
# A possible countermeasure (still working with contrasts ON) #
#####
# Empirical evidence tells that the weird case above is extremely rare
# and that it manifests whenever a numeric (say X) and a factor (say F) both
# interact with the same factor (say D), i.e. calmodel=~(X+F):D-1.
#
# The risky order-dependent nature of such models can be sterilized (while
# still taking advantage of contrasts-driven simplifications for large,
# complex calibrations) by using a numeric variable with values 1 for
# all sample units.
#
# For instance, one could use variable 'ent' in the sbs data.frame, to
# handle the (A) part of the calibration constraints. Indeed you may easily
# verify that both the calmodel formulae below:
# (i) calmodel = ~ent:region:nace.macro + emp.num:nace.macro - 1
# (ii) calmodel = ~emp.num:nace.macro + ent:region:nace.macro - 1
#
# produce exactly the same, right results.

#####
# THE ULTIMATE, 100% SAFE, COUNTERMEASURE: switch contrasts OFF! #
#####
# No contrasts means no model-matrix simplifications at all, hence
# also no unwanted, wrong simplifications. Let's see:

# To switch off contrasts simply call:
contrasts.off()

# Compare again, with contrasts OFF, the calibration models:
# (i) calmodel = ~region:nace.macro + emp.num:nace.macro - 1
# (ii) calmodel = ~emp.num:nace.macro + region:nace.macro - 1

# Build and fill the population totals templates:
temp1<-pop.template(data=sbsdes,~region:nace.macro+emp.num:nace.macro-1)
pop1<-fill.template(universe=sbs.frame,template=temp1)
pop1

temp2<-pop.template(data=sbsdes,~emp.num:nace.macro+region:nace.macro-1)
pop2<-fill.template(universe=sbs.frame,template=temp2)
pop2

# Verify they store the same, right number of totals (i.e. 16):
dim(pop1)
dim(pop2)

# Verify they lead to right calibrated objects...
cal1<-e.calibrate(sbsdes,pop1)
cal2<-e.calibrate(sbsdes,pop2)

# ...with the same calibrated weights:
all.equal(weights(cal2),weights(cal1))

# Lastly set back contrasts to ReGenesees default:
```

```
contrasts.RG()
```

```
data.examples
```

```
Artificial Household Survey Data
```

Description

Example data frames and functions. Allow to run R code contained in the 'Examples' section of the ReGenesee package help pages.

Usage

```
data(data.examples)
```

Format

The main data frame, named `example`, contains (artificial) data from a two stage stratified cluster sampling design. The sample is made up of 3000 final units, for which the following 21 variables were observed:

`towcod` Code identifying "variance PSUs": towns (PSUs) in not-self-representing (NSR) strata, families (SSUs) in self-representing (SR) strata, numeric

`famcod` Code identifying families (SSUs), numeric

`key` Key identifying final units (individuals), numeric

`weight` Initial weights, numeric

`stratum` Stratification variable, factor with levels 801 802 803 901 902 903 904 905 906 907 908 1001 1002 1003 1004 1005 1006 1007 1008 1009 1101 1102 1103 1104 3001 3002 3003 3004 3005 3006 3007 3008 3009 3010 3011 3012 3101 3102 3103 3104 3105 3106 3107 3108 3201 3202 3203 3204 5401 5402 5403 5404 5405 5406 5407 5408 5409 5410 5411 5412 5413 5414 5415 5416 5501 5502 5503 5504 9301 9302 9303 9304 9305 9306 9307 9308 9309 9310 9311 9312

`SUPERSTRATUM` Collapsed strata variable (eliminates lonely PSUs), factor with levels 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 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55

`sr` Strata type, integer with values 0 (NSR strata) and 1 (SR strata)

`regcod` Code identifying regions, factor with levels 6 7 10

`procod` Code identifying provinces, factor with levels 8 9 10 11 30 31 32 54 55 93

`x1` Indicator variable (integer), numeric

`x2` Indicator variable (integer), numeric

`x3` Indicator variable (integer), numeric

`y1` Indicator variable (integer), numeric

`y2` Indicator variable (integer), numeric

`y3` Indicator variable (integer), numeric

`age5c` Age variable with 5 classes, factor with levels 1 2 3 4 5

`age10c` Age variable with 10 classes, factor with levels 1 2 3 4 5 6 7 8 9 10

`sex` Sex variable, factor with levels f m

`marstat` Marital status variable, factor with levels married unmarried widowed

`z` A continuous quantitative variable, numeric

`income` Income variable, numeric

Details

Objects pop01, ..., pop07pp contain known population totals for various calibration models. Object pairs with names differing in the 'p' suffix (such as pop03 and pop03p) refer to the *same* calibration problem but pertain to *different* solution methods (global and iterative respectively, see [e.calibrate](#)). The two-component numeric vector bounds expresses a possible choice for the allowed range for the ratios between calibrated weights and direct weights in the aforementioned calibration problems.

Examples

```
data(data.examples)
str(example)
```

des.addvars	<i>Add Variables to Design Objects</i>
-------------	--

Description

Modifies an analytic object by adding new variables to it.

Usage

```
des.addvars(design, ...)
```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
...	tag = expr arguments defining columns to be added to design.

Details

This function adds to the data frame contained in `design` the *new* variables defined by the `tag = expr` arguments. A tag can be specified either by means of an identifier or by a character string; `expr` can be any expression that it makes sense to evaluate in the design environment.

For each argument `tag = expr` bound to the formal argument ... the added column will have *name* given by the tag value and *values* obtained by evaluating the `expr` expression on `design`. Any input expression not supplied with a tag will be ignored and will therefore have no effect on the `des.addvars` return value.

Variables to be added to the input object have to be *new*: namely it is not possible to use `des.addvars` to modify the values in a pre-existing design column.

Value

An object of the same class of `design`, containing new variables but supplied with exactly the same metadata.

Author(s)

Diego Zardetto

See Also

[e.svydesign](#) to bind survey data and sampling design metadata, [e.calibrate](#) for calibrating weights.

Examples

```
data(data.examples)

# Creation of an analytic object:
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Adding the new 'ones' variable to estimate the number
# of final units in the population:
des<-des.addvars(des,ones=1)
svystatTM(des,~ones)

# Recoding a qualitative variable:
des<-des.addvars(des,agerange=factor(ifelse(age5c==1,
  "young", "not-young")))
svystatTM(des,~agerange,estimator="Mean")
svystatTM(des,~income,~agerange,estimator="Mean",conf.int=TRUE)

# Algebraic operations on numeric variables:
des<-des.addvars(des,z2=z^2)
svystatTM(des,~z2,estimator="Mean")

# A more interesting example: estimating the
# percentage of population with income below
# the poverty threshold (defined as 0.6 times
# the average income for the whole population):
Mean.Income <- coef(svystatTM(des, ~income,estimator="Mean"))
des <- des.addvars(des,
  status = factor(
    ifelse(income < (0.6 * Mean.Income),
      "poor", "not-poor")
  )
)
svystatTM(des,~status,estimator="Mean")
# Mean income for poor and not-poor:
svystatTM(des,~income,~status,estimator="Mean")
```

e.calibrate

Calibration of Survey Weights

Description

Adds to an analytic object the calibrated weights column.

Usage

```
e.calibrate(design, df.population,
  calmodel = if (inherits(df.population, "pop.totals"))
    attr(df.population, "calmodel"),
```

```
partition = if (inherits(df.population, "pop.totals"))
  attr(df.population, "partition") else FALSE,
calfun = c("linear", "raking", "logit"),
bounds = c(-Inf, Inf), aggregate.stage = NULL,
sigma2 = NULL, maxit = 50, epsilon = 1e-07, force = TRUE)
```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
df.population	Data frame containing the known population totals for the auxiliary variables.
calmodel	Formula defining the linear structure of the calibration model.
partition	Formula specifying the variables that define the "calibration domains" for the model (see 'Details'); FALSE (the default) implies no calibration domains.
calfun	character specifying the distance function for the calibration process; the default is 'linear'.
bounds	Allowed range for the ratios between calibrated and initial weights; the default is <code>c(-Inf, Inf)</code> .
aggregate.stage	An integer: if specified, causes the calibrated weights to be constant within sampling units at this stage.
sigma2	Formula specifying a possible heteroskedasticity effect in the calibration model; NULL (the default) implies homoskedasticity.
maxit	Maximum number of iterations for the Newton-Raphson algorithm; the default is 50.
epsilon	Tolerance for the absolute relative differences between the population totals and the corresponding estimates based on the calibrated weights; the default is 10^{-7} .
force	If TRUE, whenever the calibration algorithm does not converge, forces the function to return a value (see 'Details' and 'Calibration process diagnostics'); the default is TRUE.

Details

This function creates an object of class `cal.analytic`. A `cal.analytic` object makes it possible to compute estimates and standard errors of calibration estimators [Deville, Sarndal 92] [Deville, Sarndal, Sautory 93].

The mandatory argument `calmodel` symbolically defines the calibration model you intend using, that is - in the language of the Generalized Regression Estimator - the assisting linear regression model underlying the calibration problem [Wilkinson, Rogers 73]. More specifically, the `calmodel` formula identifies the auxiliary variables and the constraints for the calibration problem. For example, `calmodel=~(X+Z):C+(A+B):D-1` defines the calibration problem in which constraints are imposed: (i) on the totals of auxiliary (quantitative) variables X and Z within the subpopulations identified by the (qualitative) classification variable C and, at the same time, (ii) on the absolute frequency of the (qualitative) variables A and B within the subpopulations identified by the (qualitative) classification variable D.

The design variables referenced by `calmodel` must be numeric or factor and must not contain any missing value (NA).

Problems for which one or more qualitative variables can be "*factorized*" in the formula that specifies the calibration model, are particularly interesting. These variables split the population into

non-overlapping subpopulations known as "*calibration domains*" for the model. An example is provided by the statement `calmodel=~(A+B+X+Z-1):D` in which the variable that identifies the calibration domains is `D`; similarly, the formula `calmodel=~(A+B+X+Z-1):D1:D2` identifies as calibration domains the subpopulations determined by crossing the modalities of `D1` and `D2`. The interest in models of this kind lies in the fact that the *global* calibration problem they describe can, actually, be broken down into *local* subproblems, one per calibration domain, which can be solved separately [Vanderhoeft 01]. Thus, for example, the global problem defined by `calmodel=~(A+B+X+Z-1):D` is equivalent to the sequence of problems defined by the "*reduced model*" `calmodel=~A+B+X+Z-1` in each of the domains identified by the modalities of `D`. The opportunity to separately solve the subproblems related to different calibration domains achieves a significant reduction in computation complexity: the gain increases with increasing survey data size and (most importantly) with increasing auxiliary variables number.

The optional argument `partition` makes it possible to choose, in cases in which the calibration problem can be factorized, whether to solve the problem globally or iteratively (that is, separately for each calibration domain). The global solution (which is the default option) can be selected invoking the `e.calibrate` function with `partition=FALSE`. To request the iterative solution - a strongly recommended option when dealing with a lot of auxiliary variables and big data sizes - it is necessary to specify via `partition` the variables defining the calibration domains for the model. If a formula is passed through the `partition` argument (for example: `partition=~D1:D2`), the program checks that `calmodel` actually describes a "reduced model" (for example: `calmodel=~A+B+X+Z-1`), that is it does not reference any of the partition variables; if this is not the case, the program stops and prints an error message. Notice that a formula like `partition=~D1+D2` will be automatically translated into the factor-crossing formula `partition=~D1:D2`.

The design variables referenced by `partition` (if any) must be factor and must not contain any missing value (NA).

The mandatory argument `df.population` is used to specify the known totals of the auxiliary variables referenced by `calmodel` within the subpopulations (if any) identified by `partition`. These known totals must be stored in a data frame whose structure (i) depends on the values of `calmodel` and `partition` and (ii) must conform to a standard. In order to facilitate understanding of and compliance with this standard, the **ReGenesees** package provides the user with three functions: `pop.template`, `population.check`, and `fill.template`. The `pop.template` function is able to guide the user in constructing the known totals data frame for a specific calibration problem, the `fill.template` function can be exploited to automatically fill the template when a sampling frame is available, while the `population.check` function allows to check whether a known totals data frame conforms to the standard required by `e.calibrate`. In any case, if the `df.population` data frame does not comply with the standard, the `e.calibrate` function stops and prints an error message: the meaning of the message should help the user diagnose the cause of the problem.

The `calfun` argument identifies the distance function to be used in the calibration process. Three built-in functions are provided: "`linear`", "`raking`", and "`logit`" (see [Deville, Sarndal, Sautory 93]). The default is "`linear`", which corresponds to the euclidean metric and yields the Generalized Regression Estimator (provided that no range restrictions are imposed on the g-weights). The "`raking`" distance corresponds to the "*multiplicative method*" of [Deville, Sarndal, Sautory 93].

The `bounds` argument allows to add "*range constraints*" to the calibration problem. To be precise, the interval defined by `bounds` will contain the values of the ratios between final (calibrated) and initial (direct) weights. The default value is `c(-Inf, Inf)`, i.e. no range constraints are imposed. These constraints are optional unless the "`logit`" function is selected: in the latter case the range defined by `bounds` has to be finite (see, again, [Deville, Sarndal, Sautory 93]).

The value passed by the `aggregate.stage` argument must be an integer between 1 and the number of sampling stages of design. If specified, causes the calibrated weights to be constant within sampling units selected at the `aggregate.stage` stage (actually this is only allowed if the initial weights had already this property, as it is sometimes the case in multistage cluster sampling). If not spec-

ified, the calibrated weights may differ even for sampling units with identical initial weights. The same holds if some final units belonging to the same cluster selected at the stage `aggregate.stage` fall in distinct calibration domains (i.e. if the domains defined by partition "cut across" the `aggregate.stage`-stage clusters).

The argument `sigma2` can be used to take into account a possible heteroskedasticity effect in the (assisting linear regression model underlying the) calibration problem. In such cases, `sigma2` must identify some variable to which the variances of the error terms are believed to be proportional. Notice that `sigma2` can also be interpreted from a "purely calibration-based" point of view: it corresponds to the $1/q_k$ unit-weights appearing inside the distance measures of [Deville, Sarndal 92] [Deville, Sarndal, Sautory 93]. The final effect is, on average, that calibrated weights associated to higher values of `sigma2` tend to stay closer to their corresponding initial weights. The `sigma2` formula can reference just a single design variable: such variable must be numeric, strictly positive and must not contain NAs. If `aggregate.stage` is specified, `sigma2` must obviously be constant inside `aggregate.stage`-stage clusters (otherwise the function stops and prints an error message).

The `maxit` argument sets the maximum number of iteration for the Newton-Raphson algorithm that is used to solve the calibration problem (the only exception being *unbounded linear* calibration, i.e. `calfun='linear'` and `bounds=c(-Inf, Inf)`, which is actually handled by directly solving a linear problem). The default value of `maxit` is 50.

The `epsilon` argument determines the convergence criterion for the optimization algorithm: it fixes the maximum allowed absolute value for the relative differences between the population totals and the corresponding estimates based on the calibrated weights. The default value is 10^{-7} .

The calibrated weights computed by `e.calibrate` must ensure that the calibration estimators of the auxiliary variables *exactly* match the corresponding known population totals. It is, however, possible (more likely when range constraints are imposed) that, for a specific calibration problem and for given values of `epsilon` and `maxit`, the solving algorithm does not converge. In this case, if `force = FALSE`, `e.calibrate` stops and prints an error message. If - on the contrary - `force = TRUE`, the function is forced to return the best approximation achieved for the calibrated weights, nevertheless signaling the calibration failure by a warning (see also Section 'Calibration process diagnostics').

Value

An object of class `cal.analytic`. The data frame it contains includes (in addition to the data already stored in `design`) the calibrated weights columns. The name of this column is obtained by pasting the name of the initial weights column with the string `".cal"`.

Calibration Process Diagnostics

When, dealing with a factorizable calibration problem, the user selects the iterative solution, the global calibration problem gets split into as many *sub-problems* as the number of subpopulations defined by partition. In turn, each one of these calibration sub-problems can end without convergence on any one of the involved auxiliary variables. A calibration process with such a complex structure needs some ad hoc tool for error diagnostics. For this purpose, every call to `e.calibrate` creates, by side effect, a dedicated data structure named `ecal.status` into the `.GlobalEnv`. `ecal.status` is a list with up to three components: the first, `"call"`, identifies the call to `e.calibrate` that generated the list, the second, `return.code`, is a matrix each element of which identifies the return code of a specific calibration sub-problem. The meaning of the return codes is as follows:

CODE	MEANING
-1.....	not yet tackled sub-problem;
0.....	solved sub-problem (convergence achieved);
1.....	unsolved sub-problem (no convergence): output forced.

Recall that the latter return code (1) may only occur if `force = TRUE`.

If any return.code equal to 1 exists, the `ecal.status` list gains a third component named "fail.diagnostics" which is itself a list; its components correspond to sub-problems for which convergence was not achieved, and store useful information about the auxiliary variables for which calibration constraints are violated. Therefore, users can exploit `ecal.status` to identify sub-problems and variables from which errors stemmed, hence taking a step forward to eliminate them.

Notice, lastly, that the `ecal.status` list will also be persistently bound to the `e.calibrate` return object, stored inside a dedicated attribute. For the inspection of such diagnostics information the `check.cal` function is available.

Note

The `cal.analytic` class is a specialization of the `analytic` class; this means that an object created by `e.calibrate` inherits from the `analytic` class and you can use on it every method defined on the latter class. For instance, a calibrated design can be passed again to `e.calibrate`, thus undergoing further calibration steps.

Author(s)

Diego Zardetto

References

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See Also

`e.svydesign` to bind survey data and sampling design metadata, `svystatTM`, `svystatR`, `svystatQ` and `svystatL` for calculating estimates and standard errors, `pop.template` for constructing known totals data frames in compliance with the standard required by `e.calibrate`, `population.check` to check that the known totals data frame satisfies that standard, `fill.template` to automatically fill the template when a sampling frame is available, `bounds.hint` to obtain a hint for range restricted calibration, `g.range` to assess the variation of weights after calibration and `check.cal` to check if calibration constraints have been fulfilled.

Examples

```
#####
# Calibration of a design object according to different calibration #
# models (the known totals data frames pop01, ..., pop05p and the #
# bounds vector are all contained in the data.examples file).      #
# For the examples relating to calibration models that can be      #
```

```

# factorized both a global and an iterative solution are given.      #
#####

data(data.examples)

# Creation of the object to be calibrated:
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# 1) Calibration on the total number of units in the population
#   (totals in pop01):
descal01<-e.calibrate(design=des,df.population=pop01,calmodel=~1,
  calfun="logit",bounds=bounds,aggregate.stage=2)

# Checking the result (first add the new 'ones' variable
# to estimate the number of final units in the population):
descal01<-des.addvars(descal01,ones=1)
svystatTM(descal01, ~ones)

# 2) Calibration on the marginal distributions of sex and marstat
#   (totals in pop02):
descal02<-e.calibrate(design=des,df.population=pop02,
  calmodel=~sex+marstat-1,calfun="logit",bounds=bounds,
  aggregate.stage=2)

# Checking the result:
svystatTM(descal02,~sex+marstat)

# 3) Calibration (global solution) on the joint distribution of sex
#   and marstat (totals in pop03):
descal03<-e.calibrate(design=des,df.population=pop03,
  calmodel=~marstat:sex-1,calfun="logit",bounds=bounds)

# Checking the result:
svystatTM(descal03,~sex,~marstat) # or: svystatTM(descal03,~marstat,~sex)

# which, obviously, is not respected by desc02 (notice the size of SE):
svystatTM(descal02,~sex,~marstat)

# 3.1) Again a calibration on the joint distribution of sex and marstat
#       but, this time, with the iterative solution (partition=~sex,
#       totals in pop03p):
descal03p<-e.calibrate(design=des,df.population=pop03p,
  calmodel=~marstat-1,partition=~sex,calfun="logit",
  bounds=bounds)

# Checking the result:
svystatTM(descal03p,~sex,~marstat)

# 4) Calibration (global solution) on the totals for the quantitative
#     variables x1, x2 and x3 in the subpopulations defined by the
#     regcod variable (totals in pop04):

```

```

descal04<-e.calibrate(design=des,df.population=pop04,
                      calmodel=~(x1+x2+x3-1):regcod,calfun="logit",
                      bounds=bounds,aggregate.stage=2)

# Checking the result:
svystatTM(descal04,~x1+x2+x3,~regcod)

# 4.1) Same problem with the iterative solution (partition=~regcod,
#       totals in pop04p):
descal04p<-e.calibrate(design=des,df.population=pop04p,
                      calmodel=~x1+x2+x3-1,partition=~regcod,calfun="logit",
                      bounds=bounds,aggregate.stage=2)

# Checking the result:
svystatTM(descal04p,~x1+x2+x3,~regcod)

# 5) Calibration (global solution) on the total for the quantitative
#    variable x1 and on the marginal distribution of the qualitative
#    variable age5c, in the subpopulations defined by crossing sex
#    and marstat (totals in pop05):
descal05<-e.calibrate(design=des,df.population=pop05,
                      calmodel=~(age5c+x1-1):sex:marstat,calfun="logit",
                      bounds=bounds)

# Checking the result:
svystatTM(descal05,~age5c+x1,~sex:marstat)

# 5.1) Same problem with the iterative solution (partition=~sex:marstat,
#       totals in pop05p):
descal05p<-e.calibrate(design=des,df.population=pop05p,
                      calmodel=~age5c+x1-1,partition=~sex:marstat,
                      calfun="logit",bounds=bounds)

# Checking the result:
svystatTM(descal05p,~age5c+x1,~sex:marstat)

# Notice that 3.1 and 5.1) 5.2) do not impose the aggregate.stage=2
# condition. This condition cannot, in fact, be fulfilled because
# in both cases the domains defined by partition "cut across"
# the des second stage clusters (households). To compare the results,
# the same choice was also made for 3) and 5).

# 5.2) Just a single example to inspect the ecal.status list generated
#       for diagnostics purposes.
#       Let's shrink the bounds in order to prevent perfect convergence
#       (recall that force=TRUE by default):
approx.cal<-e.calibrate(design=des,df.population=pop05p,
                      calmodel=~age5c+x1-1,partition=~sex:marstat,
                      calfun="logit",bounds=c(0.95,1.05))

# ...now use check.cal function to assess the amount of calibration
# constraints violation:
check.cal(approx.cal)

```

```

# ...or (equivalently) inspect directly ecal.status:
ecal.status

#####
# A simple example illustrating how calibration #
# can be exploited to reduce nonresponse bias. #
#####

# Load sbs data:
data(sbs)

#####
# Full-response case. #
#####

# Create a full-response design object:
sbsdes<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,fpc=~fpc)

# Now estimate the average value added and its 95% confidence interval:
mean.VA<-svystatTM(design=sbsdes,y=~va.imp2,estimator="Mean",vartype="cvpct",
  conf.int=TRUE,conf.lev=0.95)
mean.VA

# Compare the obtained estimate with the true population parameter:
MEAN.VA<-mean(sbs.frame$va.imp2)
MEAN.VA

# We get a small overestimation of about 4%...
100*(coef(mean.VA)-MEAN.VA)/MEAN.VA

# which, anyway, doesn't indicate a significant bias for the
# full-response sample, because the 95% confidence interval
# covers the true value.

#####
# Nonresponse case: assume a response propensity #
# which increases with enterprise size. #
#####

# Set bigger response probabilities for bigger firms,
# e.g. exploiting available information about the
# number of employees (emp.c1):
levels(sbs$emp.c1)
p.resp <- c(.4,.6,.8,.95,.99)

# Tie response probabilities to sample observations:
pr<-p.resp[unclass(sbs$emp.c1)]

# Now, randomly select a subsample of responding units from sbs:
set.seed(12345) # (fix the RNG seed for reproducibility)
rand<-runif(1:nrow(sbs))
sbs.nr<-sbs[rand<pr,]

# This implies an overall response rate of about 73%:

```

```

nrow(sbs.nr)/nrow(sbs)

# Treat the non-response sample as it was complete: this should
# lead to biased estimates of value added, as the latter is
# positively correlated with firms size...
sbsdes.nr<-e.svydesign(data=sbs.nr,ids=~id,strata=~strata,weights=~weight)

#...indeed:
options("RG.lonely.psu"="adjust") # (prevent lonely-PSUs troubles)
mean.VA.nr<-svystatTM(design=sbsdes.nr,y=~va.imp2,estimator="Mean",
  vartype= "cvpct",conf.int=TRUE,conf.lev=0.95)
mean.VA.nr

# and, comparing with the true population average, we see a
# significant overestimation effect, with the 95% confidence
# interval not even covering the parameter:
MEAN.VA

# Nonresponse bias can be effectively reduced by calibrating
# on variables explaining the response propensity: e.g., in
# the present example, on the population distribution of emp.cl:
# Prepare the known totals template...
N.emp.cl<-pop.template(data=sbs,calmodel=~emp.cl-1)
N.emp.cl

# Fill it by using the sampling frame...
N.emp.cl<-fill.template(sbs.frame,N.emp.cl)
N.emp.cl

# Lastly calibrate:
# Get a hint on the calibration bounds:
hint<-bounds.hint(sbsdes.nr,N.emp.cl)
sbscal.nr<-e.calibrate(design=sbsdes.nr,df.population=N.emp.cl,
  bounds=hint)
sbscal.nr

# Now estimate the average value added on the calibrated design:
mean.VA.cal.nr<-svystatTM(design=sbscal.nr,y=~va.imp2,estimator="Mean",
  vartype= "cvpct",conf.int=TRUE,conf.lev=0.95)

# As expected, we see a significant bias reduction:
MEAN.VA
mean.VA.nr
mean.VA.cal.nr

# Even if the 95% confidence interval still doesn't cover the
# true value, by calibration we passed from an initial overestimation
# of about 33% to a 7% one:
100*(coef(mean.VA.nr)-MEAN.VA)/MEAN.VA
100*(coef(mean.VA.cal.nr)-MEAN.VA)/MEAN.VA

```

```

#####
# A multi-step calibration example showing that #
# a calibrated object can be calibrated again #
# (this can be sometimes useful in practice). #
#####

```

```

# Suppose you already performed a first calibration step,
# as shown in the example above, with the aim of softening
# nonresponse bias:
sbscal.nr

# Now you may want to calibrate again in order to reduce
# estimators variance, by using further available auxiliary
# information, e.g. the total number of employees (emp.num)
# and enterprises (ent) inside the domains obtained
# by crossing nace.macro and region:

# Build the second step population totals template:
pop2<-pop.template(sbs,
  calmodel=~emp.num+ent-1,
  partition=~nace.macro:region)

# Use the fill.template function to (i) automatically compute
# the totals from the universe (sbs.frame) and (ii) safely fill
# the template:
pop2<-fill.template(universe=sbs.frame,template=pop2)

# Now perform the second calibration step:
# Get a hint on the calibration bounds:
hint2<-bounds.hint(sbscal.nr,pop2)
sbscal.nr2<-e.calibrate(design=sbscal.nr,df.population=pop2,
  bounds=hint2)

# Notice that printing sbscal.nr2 you immediately understand
# that it is a "twice-calibrated" object:
sbscal.nr2

# Notice also that, even if the second calibration step causes
# sbscal.nr2 to be no more exactly calibrated with respect to
# emp.cl (look at the cvpct values)...
options("RG.lonely.psu"="adjust") # (prevent lonely-PSUs troubles)
svystatTM(design=sbscal.nr2,y=~emp.cl,vartype="cvpct")

# ...the nonresponse bias has not been resurrected (i.e. it gets stuck
# to its previous 7%):
mean.VA.cal.nr2<-svystatTM(design=sbscal.nr2,y=~va.imp2,estimator="Mean",
  vartype="cvpct",conf.int=TRUE,conf.lev=0.95)
mean.VA.cal.nr2
100*(coef(mean.VA.cal.nr2)-MEAN.VA)/MEAN.VA

#####
# Example with heteroskedastic assisting linear model: shows how to obtain #
# the ratio estimator of a total by calibration. #
#####

# Load sbs data:
data(sbs)

# Create the design object to be calibrated:
sbsdes<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,fpc=~fpc)

```

```

# Suppose you have to calibrate on the total amount of employees:
# Prepare the template:
pop<-pop.template(data=sbsdes,calmodel=~emp.num-1)
pop

# Fill it by using the sampling frame (sbs.frame)...
pop<-fill.template(sbs.frame,pop)
pop

# ... thus the total number of employees is 984394.
# Now calibrate assuming that error terms variances are proportional
# to emp.num:
sbscal<-e.calibrate(design=sbsdes,df.population=pop,sigma2=~emp.num)

# Now compute the calibration estimator of the total
# of value added (i.e. variable va.imp2)...
VA.tot.cal<-svystatTM(design=sbscal,y=~va.imp2)
VA.tot.cal

#... and observe that this is identical to the ratio estimator of the total...
VA.ratio<-svystatL(design=sbsdes, expression(984394*va.imp2/emp.num))
VA.ratio

# ...as it must be.

# Recall that, for the calibration problem above, one must expect, by virtue of
# simple theoretical arguments, that the g-weights are constant and equal to the
# ratio between the known total of emp.num (984394) and its HT estimate.
# This property is exactly satisfied by our numerical results, see below:
984394/coef(svystatTM(sbsdes, ~emp.num))
g.range(sbscal)

# ...as it must be.

#####
# A second example of calibration with heteroskedastic assisting linear #
# model. Shows that calibrated weights associated to higher values of   #
# sigma2 tend to stay closer to their corresponding initial weights.    #
#####

# Perform a calibration process which exploits as auxiliary
# information the total number of employees (emp.num)
# and enterprises (ent) inside the domains obtained by:
# i) crossing nace2 and region;
# ii) crossing emp.cl, region and nace.macro;

# Build the population totals template:
pop<-pop.template(sbsdes,
  calmodel=~(emp.num+ent):(nace2+emp.cl:nace.macro)-1,
  partition=~region)

# Use the fill.template function to (i) automatically compute
# the totals from the universe (sbs.frame) and (ii) safely fill
# the template:
pop<-fill.template(universe=sbs.frame,template=pop)

```



```
# Now calibrate:
# 1) First, without any heteroskedasticity effect
sbscal1<-e.calibrate(sbsdes,pop,calfun="linear",bounds = c(0.01, 3),
  sigma2=NULL)

# 2) Then, with heteroskedastic effect proportional to emp.num:
sbscal2<-e.calibrate(sbsdes,pop,calfun="linear",bounds = c(0.01, 3),
  sigma2=~emp.num)

# Compute the g-weights for both the calibrated objects:
g1<-weights(sbscal1)/weights(sbsdes)
g2<-weights(sbscal2)/weights(sbsdes)

# Now visually compare the absolute deviations from 1 of the g-weights
# as a function of emp.num:
plot(log10(sbs$emp.num),abs(g1-1), col="blue", pch=19, cex=0.5)
points(log10(sbs$emp.num),abs(g2-1), col="red", pch=19, cex=0.5)

#...as emp.num grows red points clearly tend to stay closer to
# the horizontal axis than blue ones, as expected.
```

e.svydesign

Specification of a Complex Survey Design

Description

Bind survey data and sampling design metadata.

Usage

```
e.svydesign(data, ids, strata = NULL, weights,
  fpc = NULL, self.rep.str = NULL, check.data = TRUE)
```

Arguments

data	Data frame of survey data.
ids	Formula identifying clusters selected at subsequent sampling stages (PSUs, SSUs, ...).
strata	Formula identifying the stratification variable; NULL (the default) implies no stratification.
weights	Formula identifying the initial weights for the sampling units.
fpc	Formula identifying finite population corrections at subsequent sampling stages (see 'Details').
self.rep.str	Formula identifying self-representing strata (SR), if any; NULL (the default) means no SR strata (see 'Details').
check.data	Check out the correct nesting of data clusters? The default is TRUE.

Details

This function has the purpose of binding in an effective and persistent way the survey data to the metadata describing the adopted sampling design. Both kinds of information are stored in a complex object of class `analytic`, which extends the `survey.design2` class from the **survey** package. The sampling design metadata are then used to enable and guide processing and analyses provided by other functions in the **ReGenesees** package (such as `e.calibrate`, `svstatTM`, ...).

The `data`, `ids` and `weights` arguments are mandatory, while `strata`, `fpc`, `self.rep.str` and `check.data` arguments are optional. The data variables that are referenced by `ids`, `weights` and, if specified, by `strata`, `fpc`, `self.rep.str` must not contain any missing value (NA). Should empty levels be present in any factor variable belonging to `data`, they would be dropped.

The `ids` argument specifies the cluster identifiers. It is possible to specify a multi-stage sampling design by simply using a formula which involves the identifiers of clusters selected at subsequent sampling stages. For example, `ids=~id.PSU + id.SSU` declares a two-stage sampling in which the first stage units are identified by the `id.PSU` variable and second stage ones by the `id.SSU` variable.

The `strata` argument identifies the stratification variable. The data variable referenced by `strata` (if specified) must be a factor. By default the sample is assumed to be non-stratified.

The `weights` argument identifies the initial (or direct) weights for the units included in the sample. The data variable referenced by `weights` must be numeric. Direct weights must be strictly positive.

The `fpc` formula specifies the finite population corrections at subsequent sampling stages. If the survey has only one stage, then the `fpc`s can be given either as the total population size in each stratum or as the fraction of the total population that has been sampled. In either case the relevant population size is the sampling units (be they actual units or clusters). That is, sampling 100 units from a population stratum of size 500 can be specified as 500 or as $100/500=0.2$.

For multistage sampling the population size for each sampling stage should also be specified in `fpc`. For instance, when `ids=~id.PSU + id.SSU` the `fpc` formula should look like `fpc=~fpc.PSU + fpc.SSU`, with variable `fpc.PSU` giving the sampling fractions in each stratum for the first stage units, while variable `fpc.SSU` gives the sampling fractions for the second stage units in each sampled PSU. If `fpc` is specified but for fewer stages than `ids`, sampling is assumed to be complete for subsequent stages. The function will check that `fpc`s values at each sampling stage do not vary within strata.

When dealing with a multistage, stratified sampling design that includes *self-representing (SR) strata* (i.e. strata containing PSUs selected with probability 1), the main contribution to the variance of the SR strata arises from the second stage units ("*variance PSUs*").

When `options("RG.ultimate.cluster")` is FALSE (which is the default for **ReGenesees**), variance estimation for SR strata is correctly handled provided the survey `fpc`s have been properly specified.

When, on the contrary, the "*Ultimate Cluster Approximation*" holds (i.e. `options("RG.ultimate.cluster")` has been set to TRUE) the SR strata give no contribution at all to the sampling variance.

A compromise solution (adopted by former existing survey softwares) is the one of retaining, for both SR and not-SR strata, only the leading contribution to the sampling variance. This means that only the SSUs are relevant for SR strata, whereby only the PSUs matter in not-SR strata. This compromise solution can be achieved by using the `self.rep.str` argument. If this argument is actually specified (as a formula referencing the data variable that identifies the SR strata), a warning is generated in order to remind the user that a compromise solution for variance estimation will be adopted on that design. Notice that, when choosing the `self.rep.str` option, the user must ensure that the variable referenced by `self.rep.str` is logical (with value TRUE for SR strata and FALSE otherwise) or numeric (with value 1 for SR strata and 0 otherwise) or factor (with levels "1" for SR strata and "0" otherwise).

The optional argument `check.data` allows to check out the correct nesting of data clusters (PSUs, SSUs, ...). If `check.data=TRUE` the function checks that every unit selected at stage $k+1$ is associated to one and only one unit selected at stage k . For a stratified design the function checks also the correct nesting of clusters within strata.

Value

An object of class `analytic`. The print method for that class gives a concise description of the sampling design. Objects of class `analytic` persistently store input survey data inside their `variables` component. Weights can be accessed by using the `weights` function.

Note

The `analytic` class is a specialization of the `survey.design2` class from the **survey** package; this means that an object created by `e.svydesign` inherits from the `survey.design2` class and you can use on it every method defined on the latter class.

Author(s)

Diego Zardetto.

References

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See Also

`svyestatTM`, `svyestatR`, `svyestatQ`, `svyestatL` for calculating estimates and standard errors, `e.calibrate` for calibrating weights, `ReGenesees.options` for setting/changing variance estimation options, `collapse.strata` for the suggested way of handling lonely PSUs, `weights` to extract weights.

Examples

```
#####
# The following examples illustrate how to create objects      #
# (of class 'analytic') defining different sampling designs.  #
# Note: sometimes the same survey data will be used to      #
# define more than one design: this serves only the purpose  #
# of illustrating e.svydesign syntax.                         #
#####

data(data.examples)
# Two-stage stratified cluster sampling design (notice that
# the design contains lonely PSUs):
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~stratum,
  weights=~weight)
des

# Use the 'variables' slot to extract survey data, e.g.:
head(des$variables)

# Use the weights() function to extract weights, e.g.:
```

```

summary(weights(des))

# Again the same design, but using collapsed strata (SUPERSTRATUM variable)
# to remove lonely PSUs:
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)
des

# Two stage cluster sampling (no stratification):
des<-e.svydesign(data=example,ids=~towcod+famcod,weights=~weight)
des

# Stratified unit sampling design:
des<-e.svydesign(data=example,ids=~key,strata=~SUPERSTRATUM,
  weights=~weight)
des

data(sbs)
# One-stage stratified unit sampling without replacement
# (notice the presence of the fpc argument):
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,
  fpc=~fpc)
des

# Same design as above but ignoring the finite population corrections:
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight)
des

data(fpcdat)
# Two-stage stratified cluster sampling without replacement
# (notice that the fpcs are specified for both stages):
des<-e.svydesign(data=fpcdat,ids=~psu+ssu,strata=~stratum,weights=~w,
  fpc=~fpc1+fpc2)
des

# Same design as above but assuming complete sampling for the
# second stage units (notice fpcs have been passed only for the
# first stage):
des<-e.svydesign(data=fpcdat,ids=~psu+ssu,strata=~stratum,weights=~w,
  fpc=~fpc1)
des

# Again a two-stage stratified cluster sampling without replacement but
# specified in such a way as to retain, in the estimation phase, only
# the leading contribution to the sampling variance (i.e. the one arising
# from SSUs in SR strata and PSUs in not-SR strata). Notice that the
# self.rep.str argument is used:
des<-e.svydesign(data=fpcdat,ids=~psu+ssu,strata=~stratum,weights=~w,
  fpc=~fpc1+fpc2, self.rep.str=~sr)
des

```

Description

These functions extract standard errors (SE), variances (VAR), coefficients of variation (cv) and design effects (deff) from an object which has been returned by a survey statistic function (e.g. [svystatTM](#), [svystatR](#), [svystatQ](#), [svystatL](#), ...).

Usage

```
SE(object, ...)
VAR(object, ...)
cv(object, ...)
deff(object, ...)
```

Arguments

<code>object</code>	An object containing survey statistics.
<code>...</code>	Arguments for future expansion.

Details

With the exception of `deff`, all extractor functions can be used on any object returned by a survey statistic function: the correct answer will be obtained whatever the call that generated the object. For getting the design effect, object must have been built with option `deff = TRUE`.

Value

A vector storing the requested informations.

Note

Package **ReGenesees** provides extensions of methods [coef](#) and [confint](#) (originally from package **stats**) that can be used to extract estimates and confidence intervals respectively.

Author(s)

Diego Zardetto

See Also

Function [coef](#) to extract estimates and function [confint](#) to extract confidence intervals. Estimators of Totals and Means [svystatTM](#), Ratios between Totals [svystatR](#), Quantiles [svystatQ](#) and Complex Analytic Functions of Totals and/or Means [svystatL](#).

Examples

```
# Creation of a design object:
data(sbs)
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,
  fpc=~fpc)

# Estimation of the average value added at the
# nation level (by default one gets the SE):
VA.avg <- svystatTM(des,~va.imp2,estimator="Mean")
VA.avg
```

```

# Extractions of some variance statistics from the
# object above:
## 1) SE
SE(VA.avg)
## 2) CV
cv(VA.avg)
## 3) VAR
VAR(VA.avg)

# Design effects have to be requested in advance,
# i.e. the following invocation produces an error:
## Not run:
deff(VA.avg)

## End(Not run)
# ...while the following works:
VA.avg <- svystatTM(des,~va.imp2,estimator="Mean",deff=TRUE)
deff(VA.avg)

# Further examples:
## extract the statistic:
coef(VA.avg)
## extract the confidence interval at 90%
## confidence level (the default would be 95%):
confint(VA.avg, conf.lev=0.9)

```

fill.template

Fill the Known Totals Template for a Calibration Task

Description

Given a template prepared to store the totals of the auxiliary variables for a specific calibration task, computes the actual values of such totals from a sampling frame.

Usage

```
fill.template(universe, template, mem.frac = 10)
```

Arguments

universe	Data frame containing the complete list of the units belonging to the target population, along with the corresponding values of the auxiliary variables (the sampling frame).
template	The template for the calibration task, an object of class <code>pop.totals</code> .
mem.frac	A numeric and non-negative value (the default is 10). It triggers a memory-efficient algorithm when universe is really huge (see 'Details' and 'Performance').

Details

Recall that a `template` object returned by function `pop.template` has a structure that complies with the standard required by `e.calibrate`, but is *empty*, in the sense that all the known totals it must be able to store are missing (NA). Whenever these totals are available to the user as such, that is in the form of already computed aggregated values (e.g. because they come from an external

source, like a Population Census), the **ReGenesees** package cannot help the user to correctly fill the template. Stated more explicitly: the user himself has to bear the responsibility of putting the *right values* in the *right slots* of the prepared template data frame.

A lucky alternative arises when a "*sampling frame*" (that is a data frame containing the complete list of the units belonging to the target population, along with the corresponding values of the auxiliary variables) is available. In such cases, indeed, the `fill.template` function is able to: (i) automatically compute the totals of the auxiliary variables from the universe data frame, (ii) safely arrange and format these values according to the template structure.

Notice that `fill.template` will perform a complete coherence check between universe and template. If this check fails, the program stops and prints an error message: the meaning of the message should help the user diagnose the cause of the problem. Should empty levels be present in any factor variable belonging to universe, they would be dropped.

Argument `mem.frac` (whose value must be numeric and non-negative) triggers a memory-efficient algorithm when universe is *really huge*. The *only* sound reason to ever change the value of this argument from its default (`mem.frac=10`) is that an invocation of `fill.template` caused a memory-failure (i.e. a messages beginning cannot allocate vector of size ...) on your machine. In such a case, *increasing* the value of `mem.frac` (e.g. `mem.frac=20`) will provide a better chance of succeeding (for more details, see 'Performance' section below).

Value

An object of class `pop.totals` storing the *actual* values of the population totals for the specified calibration task, ready to be safely passed to `e.calibrate`.

Performance

Real-world calibration tasks (e.g. in the field of Official Statistics) can simultaneously involve several hundreds of auxiliary variables and refer to target populations of several millions units. In such circumstances, the naive aggregation of the calibration model `matrix` of universe may turn out to be too memory-demanding (at least in ordinary PC environments) and determine a memory-failure error.

The alternative implemented in `fill.template` is to: (i) split universe in chunks, (ii) compute partial sums of auxiliary variables chunk-by-chunk, (iii) update template by adding progressively such partial sums. This alternative is triggered by parameter `mem.frac`, which also implicitly controls the number of chunks. The function estimates the memory that would be used to store the *full* model `matrix` of universe and compares it to the maximum memory allocable on the machine (as returned by `memory.limit`): if the resulting ratio is bigger than $1/\text{mem.frac}$, the memory-efficient algorithm starts; the number of chunks in which universe will then be split is determined in such a way that the memory needed to store the model `matrix` of *each* chunk does not exceed a fraction $1/\text{mem.frac}$ of the maximum allocable memory.

Whenever `fill.template` switches to the memory-efficient "chunking" algorithm, a warning message will signal it and will specify as well the number of chunks that are being processed.

Author(s)

Diego Zardetto

See Also

`e.calibrate` for calibrating weights, `pop.template` for the definition of the class `pop.totals` and to build a "template" data frame for known population totals, and `%into%` for the compression operator for nested factors.

Examples

```
# Load sbs data:
data(sbs)

# Build a design object:
sbsdes<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,fpc=~fpc)

# Now suppose you have to perform a calibration process which
# exploits as auxiliary information the total number of employees (emp.num)
# and enterprises (ent) inside the domains obtained by:
# i) crossing nace2 and region;
# ii) crossing emp.cl, region and nace.macro;

# Due to the fact that nace2 is nested into nace.macro,
# the calibration model can be efficiently factorized as follows:
## 1) Add to the design object and universe the new compressed
#    factor variable involving nested factors, namely:
sbsdes<-des.addvars(sbsdes,nace2.in.nace.macro=nace2 %into% nace.macro)
sbs.frame$nace2.in.nace.macro<-sbs.frame$nace2 %into% sbs.frame$nace.macro

# 2) Build the template exploiting the new variable:
pop<-pop.template(sbsdes,
  calmodel=~(emp.num+ent):(nace2.in.nace.macro + emp.cl)-1,
  partition=~nace.macro:region)

# Note: given the dimension of the obtained template...
dim(pop)

# ...the number of (independent) known totals to be stored is 792.

# 3) Use the fill.template function to (i) automatically compute
#    such 792 totals from the universe (sbs.frame) and (ii) safely fill
#    the template:
pop<-fill.template(universe=sbs.frame,template=pop)

# 4) Lastly calibrate, e.g. with the unbounded linear distance and
#    heteroskedastic effects proportional to emp.num:
sbscal<-e.calibrate(sbsdes,pop,sigma2=~emp.num,bounds=c(-Inf,Inf))

# Note: a global calibration task would have led to identical calibrated
# weights, but in a more memory-hungry and time-consuming way, as you can
# verify:
# 1) Build template:
pop.g<-pop.template(sbsdes,
  calmodel=~(emp.num+ent):(nace2:region + emp.cl:nace.macro:region)-1)
dim(pop.g)

# 2) Fill template:
pop.g <- fill.template(sbs.frame,pop.g)

# 3) Calibrate globally:
## Not run:
sbscal.g<-e.calibrate(sbsdes,pop.g,sigma2=~emp.num,bounds=c(-1E6,1E6))

# 4) Compare calibrated weights (factorized vs. global solution):
range(weights(sbscal)/weights(sbscal.g))
```



```

# ... they are equal.

## End(Not run)

# Just a single example of the memory-efficient algorithm triggered
# by mem.frac:
## Not run:
# First artificially increase the size of the sampling frame (e.g.
# up to 5 millions rows):
sbs.frame.HUGE<-sbs.frame[sample(1:nrow(sbs.frame),5000000,rep=TRUE),]
dim(sbs.frame.HUGE)

# Build the template:
pop<-pop.template(sbsdes,
  calmodel=~(emp.num+ent):(nace2.in.nace.macro + emp.cl)-1,
  partition=~nace.macro:region)
dim(pop)

# Fill the template by using the HUGE universe:
pop<-fill.template(universe=sbs.frame.HUGE,template=pop)

## End(Not run)

```

fpcdat

A Small But Not Trivial Artificial Sample Data Set

Description

A small dataset mimicking sample data selected with a 2-stage, stratified, cluster sampling without replacement. Allows to run R code contained in the 'Examples' section of the ReGenesees package help pages.

Usage

```
data(fpcdat)
```

Format

A data frame with 28 observations on the following 12 variables.

psu Identifier of the primary sampling units, numeric

ssu Identifier of the second stage sampling units, numeric

stratum Stratification Variable, a factor with 5 levels: S.1, S.2, S.3, S.4, S.5

sr Strata type, integer with values 0 (NSR strata) and 1 (SR strata)

fpc1 First stage finite population corrections, given as population sizes (in terms of psu clusters) inside strata, numeric

fpc2 Second stage finite population corrections, given as population sizes (in terms of ssu clusters) inside the corresponding sampled psu, numeric

x A numeric variable

y A numeric variable

dom1 A variable defining unplanned estimation domains, factor with 3 levels: A, B, C
 dom2 A variable defining unplanned estimation domains, factor with 6 levels: a, b, c, d, e, f
 w Direct weights, numeric
 z A numeric variable
 pl.domain A variable defining planned estimation domains, factor with 3 levels: pd.1, pd.2, pd.3

Details

Though very small, the `fpcdat` dataset concentrates a lot of interesting features. The sampling design is a complex one, with both self-representing (SR) and not-self-representing (NSR) strata. Sampling fractions are deliberately not negligible, in order to stress the effects of finite population corrections on variance estimation. Moreover, being the observations so few, performing computations on the `fpcdat` dataset allows to check and understand easily all the effects of setting/changing the global variance estimation options of the **ReGenesees** package (see e.g. [ReGenesees.options](#)).

See Also

[ReGenesees.options](#) for setting/changing variance estimation options.

Examples

```
data(fpcdat)
str(fpcdat)
```

<code>g.range</code>	<i>Range of g-Weights</i>
----------------------	---------------------------

Description

Computes the range of the ratios between calibrated weights and initial weights (*g-weights*).

Usage

```
g.range(cal.design)
```

Arguments

`cal.design` Object of class `cal.analytic`.

Details

This function computes the smallest interval which contains the ratios between calibrated weights and initial weights.

Value

A numeric vector of length 2.

Note

If `cal.design` has undergone k subsequent calibration steps (with $k > 2$), the function will return the range of the ratios between the output weights of calibration steps k and $k - 1$.

Author(s)

Diego Zardetto

See Also

[weights](#) to extract the weights from a design object, [e.calibrate](#) for calibrating weights and [bounds.hint](#) to obtain a hint for calibration problems where range restrictions are imposed on the *g-weights*.

Examples

```
# Creation of the object to be calibrated:
data(data.examples)
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Calibration (iterative solution) on the marginal distribution
# of age in 5 classes (age5c) inside provinces (procod)
# (totals in pop06p) with bounds=c(0.5, 1.5):
descal06p<-e.calibrate(design=des,df.population=pop06p,
  calmodel=~age5c-1,partition=~procod,calfun="logit",
  bounds=c(0.5, 1.5),aggregate.stage=2)

# Now let's verify the actual range of the obtained g-weights:
g.range(descal06p)

# which indeed is covered by c(0.5, 1.5), as required.

# Now calibrate once again, this time on the joint distribution of sex
# and marstat (totals in pop03) with the global solution:
descal2<-e.calibrate(design=descal06p,df.population=pop03,
  calmodel=~marstat:sex-1,calfun="linear",bounds=bounds)

# Notice that the print method correctly takes the calibration chain
# into account:
descal2

# The range of the g-weights for the twice calibrated object is:
g.range(descal2)

#... which is equal to:
range(weights(descal2)/weights(descal06p))

#... and must not be confused with:
range(weights(descal2)/weights(des))
```

pop.template

*Template Data Frame for Known Population Totals***Description**

Constructs a *"template"* data frame to store known population totals for a calibration problem.

Usage

```
pop.template(data, calmodel, partition = FALSE)
```

Arguments

data	Data frame of survey data (or an object inheriting from class <code>analytic</code>).
calmodel	Formula defining the linear structure of the calibration model.
partition	Formula specifying the variables that define the "calibration domains" for the model. FALSE (the default) implies no calibration domains.

Details

This function creates an object of class `pop.totals`. A `pop.totals` object is made up by the union of a data frame (whose structure conforms to the standard required by `e.calibrate` for the known totals) and the metadata describing the calibration problem.

The mandatory argument `data` must identify the survey data frame on which the calibration problem is defined (or, as an alternative, an `analytic` object built upon that data frame). Should empty levels be present in any factor variable belonging to `data`, they would be dropped.

The mandatory argument `calmodel` symbolically defines the calibration model you intend using: it identifies the auxiliary variables and the constraints for the calibration problem. The data variables referenced by `calmodel` must be numeric or factor and must not contain any missing value (NA).

The optional argument `partition` specifies the variables that define the calibration domains for the model. The default value (FALSE) means either that there are not calibration domains or that you want to solve the problem globally (even though it could be factorized). If a formula is passed through the `partition` argument the program checks that `calmodel` actually describes a "reduced model", that is it does not reference any of the partition variables; if this is not the case, the program stops and prints an error message. Notice that a formula like `by=~D1+D2` will be automatically translated into the factor-crossing formula `by=~D1:D2`. The data variables referenced by `partition` (if any) must be factor and must not contain any missing value (NA).

Value

An object of class `pop.totals`. The data frame it contains is a *"template"* in the sense that all the known totals it must be able to store are missing (NA). However, this data frame has a structure that complies with the standard required by `e.calibrate` (provided the latter is invoked with the same `calmodel` and `partition` values used to create the template).

The operation of filling the template's NAs with the actual values of the corresponding population totals has, obviously, to be done by the user. If the user has access to a *"sampling frame"* (that is a data frame containing the complete list of the units belonging to the target population along with the corresponding values of the auxiliary variables), then he can exploit the function `fill.template` to automatically fill the template.

The `pop.totals` class is a specialization of the `data.frame` class; this means that an object built by `pop.template` inherits from the `data.frame` class and you can use on it every method defined on that class.

Author(s)

Diego Zardetto

See Also

[e.calibrate](#) for calibrating weights, [population.check](#) to check that the known totals data frame satisfies the standard required by `e.calibrate`, [fill.template](#) to automatically fill the template when a sampling frame is available.

Examples

```
# Creation of population totals template data frames for different
# calibration problems (if the calibration models can be factorized
# both a global and an iterative solution are given):

data(data.examples)

# 1) Calibration on the total number of units in the population:
pop.template(data=example,calmodel=~1)

# 2) Calibration on the total number of units in the population
# and on the marginal distribution of marstat (notice that the
# total for the first level "married" of the marstat factor
# variable is missing because it can be deduced from
# the remaining totals):
pop.template(data=example,calmodel=~marstat)

# 3) Calibration on the marginal distribution of marstat (you
# must explicitly remove the intercept term in the
# calibration model adding -1 to the calmodel formula):
pop.template(data=example,calmodel=~marstat-1)

# 4) Calibration (global solution) on the joint distribution of sex
# and marstat:
pop.template(data=example,calmodel=~sex:marstat-1)

# 4.1) Calibration (iterative solution) on the joint distribution
# of sex and marstat:
# 4.1.1) Using sex to define calibration domains:
pop.template(data=example,calmodel=~marstat-1,partition=~sex)

# 4.1.2) Using marstat to define calibration domains:
pop.template(data=example,calmodel=~sex-1,partition=~marstat)

# 5) Calibration (global solution) on the total for the quantitative
# variable x1 and on the marginal distribution of the qualitative
# variable age5c, in the subpopulations defined by crossing sex
# and marstat:
```

```

pop.template(data=example,calmodel=~(age5c+x1-1):sex:marstat)

# 5.1) The same problem with iterative solutions:
#     5.1.1) Using sex to define calibration domains:
pop.template(data=example,calmodel=~(age5c+x1-1):marstat,partition=~sex)

#     5.1.2) Using marstat to define calibration domains:
pop.template(data=example,calmodel=~(age5c+x1-1):sex,partition=~marstat)

#     5.1.3) Using sex and marstat to define calibration domains:
pop.template(data=example,calmodel=~age5c+x1-1,partition=~sex:marstat)

```

population.check

Compliance Test for Known Totals Data Frames

Description

Checks whether a known population totals data frame conforms to the standard required by `e.calibrate` for a specific calibration problem.

Usage

```
population.check(df.population, data, calmodel, partition = FALSE)
```

Arguments

<code>df.population</code>	Data frame of known population totals.
<code>data</code>	Data frame of survey data (or an object inheriting from class <code>analytic</code>).
<code>calmodel</code>	Formula defining the linear structure of the calibration model.
<code>partition</code>	Formula specifying the variables that define the "calibration domains" for the model. <code>FALSE</code> (the default) implies no calibration domains.

Details

The behaviour of this function depends on the outcome of the test. If `df.population` is found to conform to the standard, the function first converts it into an object of class `pop.totals` and then invisibly returns it. Failing this, the function stops and prints an error message: the meaning of the message should help the user diagnose the cause of the problem.

The mandatory argument `df.population` identifies the known totals data frame for which compliance with the standard is to be checked.

The mandatory argument `data` identifies the survey data frame on which the calibration problem is defined (or, as an alternative, an `analytic` object built upon that data frame).

The mandatory argument `calmodel` symbolically defines the calibration model you intend using: it identifies the auxiliary variables and the constraints for the calibration problem. The data variables referenced by `calmodel` must be numeric or factor and must not contain any missing value (NA).

The optional argument `partition` specifies the variables that define the calibration domains for the model. The default value (`FALSE`) means either that there are not calibration domains or that you want to solve the problem globally (even though it could be factorized). If a formula is passed through the `partition` argument the program checks that `calmodel` actually describes a "reduced model", that is it does not reference any of the partition variables; if this is not the case, the program

stops and prints an error message. Notice that a formula like `by=~D1+D2` will be automatically translated into the factor-crossing formula `by=~D1:D2`. The data variables referenced by `partition` (if any) must be factor and must not contain any missing value (NA).

Value

An invisible object of class `pop.totals`. The `pop.totals` class is a specialization of the `data.frame` class; this means that an object built by `pop.template` inherits from the `data.frame` class and you can use on it every method defined on that class.

Note

The `population.check` function can be used to convert a known totals data frame that conforms to the standard required by `e.calibrate` into an object of class `pop.totals`. The usefulness of this conversion lies in the fact that, once you have known totals with this "certified format", you can invoke `e.calibrate` without specifying the values for the `calmodel` and `partition` arguments (this means that the function is able to extract them directly from the attributes of the `pop.totals` object).

Author(s)

Diego Zardetto

See Also

[e.calibrate](#) for calibrating weights, [pop.template](#) for the definition of the class `pop.totals` and to build a "template" data frame for known population totals, [fill.template](#) to automatically fill the template when a sampling frame is available.

Examples

```
data(data.examples)

# Suppose you have to calibrate the example survey data frame
# on the totals of x1 by sex and you want the iterative solution.
# Start creating a design object:
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Then build a template data frame for the known totals:
pop<-pop.template(data=example,calmodel=~x1-1,partition=~sex)
pop
class(pop)

# Now fill NAs with the actual values for the population
# totals (suppose 123 for sex="f" and 456 for sex="m"):
pop[,"x1"]<-c(123,456)
pop
class(pop)

# Finally check if pop complies with the e.calibrate standard:
population.check(df.population=pop,data=example,calmodel=~x1-1,
  partition=~sex)

# If, despite keeping the content unchanged, we altered the
```

```

# structure of the data frame (for example, by changing the
# order of its rows)...
pop.mod<-pop ; pop.mod[1,<-pop[2,] ; pop.mod[2,<-pop[1,]
pop
pop.mod

# ...we would obtain an error:
## Not run:
population.check(df.population=pop.mod,data=example,calmodel=~x1-1,
                  partition=~sex)

## End(Not run)

# Remember that, if the known totals have been converted
# into the pop.totals "format" by means of population.check,
# it is possible to invoke e.calibrate without specifying
# calmodel and partition:

class(pop04p)
pop04p
descal04p<-e.calibrate(design=des,df.population=pop04p,
                       calfun="logit",bounds=bounds,aggregate.stage=2)

# ...this option is not allowed if the known totals
# are not of class pop.totals even if they conform to the
# standard:

pop04p.mod=data.frame(pop04p)
class(pop04p.mod)
pop04p.mod
## Not run:
e.calibrate(design=des,df.population=pop04p.mod,calfun="logit",
            bounds=bounds,aggregate.stage=2)

## End(Not run)

```

ReGenesees.options

Variance Estimation Options for the ReGenesees Package

Description

This help page documents the options that control the behaviour of the ReGenesees package with respect to standard error estimation.

Details

The **ReGenesees** package provides three options for variance estimations which can be freely set and modified by the user:

- RG.ultimate.cluster
- RG.lonely.psu
- RG.adjust.domain.lonely

When `options("RG.ultimate.cluster")` is TRUE, the **ReGenesees** package adopts the so called *"Ultimate Cluster Approximation"* [Kalton 79]. Under this approximation, the overall sampling variance for a multistage sampling design is estimated by taking into account only the contribution arising from the estimated PSU totals (thus simply ignoring any available information about subsequent sampling stages). This approach is known to underestimate the true multistage variance, while - at the same time - overestimating its true first-stage component. Anyway, the underestimation becomes negligible if the PSUs' sampling fractions across strata are very small.

When `options("RG.ultimate.cluster")` is FALSE, each sampling stage contributes and variances get estimated by means of a recursive algorithm [Bellhouse, 85] inherited and adapted from package **survey** [Lumley 06]. Notice that the results obtained by choosing this option can differ from the one that would be obtained under the "Ultimate Cluster Approximation" *only if* first-stage finite population corrections are specified.

Lonely PSUs (i.e. PSUs which are alone inside a not self-representing stratum) are a concern from the viewpoint of variance estimation. The suggested **ReGenesees** facility to handle the lonely PSUs problem is the strata aggregation technique (see e.g. [Wolter 85] and [Rust, Kalton 87]) provided in function `collapse.strata`. As a possible alternative, you can get rid of lonely PSUs also by setting proper variance estimation options via `options("RG.lonely.psu")`. The default setting is "fail", which raises an error if a lonely PSU is met. Option "remove" simply causes the software to ignore lonely PSUs for variance computation purposes. Option "adjust" means that deviations from the *population mean* will be used in variance estimation formulae, instead of deviations from the stratum mean (a conservative choice). Finally, option "average" causes the software to replace the variance contribution of the stratum by the average variance contribution across strata (this can be appropriate e.g. when one believes that lonely PSU strata occur at random due to uniform nonresponse among strata).

The variance formulae for domain estimation give well-defined, positive results when a stratum contains only one PSU with observations in the domain, but are not unbiased.

If `options("RG.adjust.domain.lonely")` is TRUE and `options("RG.lonely.psu")` is "average" or "adjust" the same adjustment for lonely PSUs will be used within a domain. Note that this adjustment is not available for calibrated designs.

References

- Kalton, G. (1979). *"Ultimate cluster sampling"*, Journal of the Royal Statistical Society, Series A, 142, pp. 210-222.
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- Wolter, K.M. (1985) *"Introduction to Variance Estimation"*, Springer-Verlag, New York.
- Rust, K., Kalton, G. (1987) *"Strategies for Collapsing Strata for Variance Estimation"*, Journal of Official Statistics, Vol. 3, No. 1, pp. 69-81.

See Also

`e.svydesign` and its `self.rep.str` argument for a "compromise solution" that can be adopted when the sampling design involves self-representing (SR) strata, `collapse.strata` for the suggested way of handling lonely PSUs, and `fpcdat` for useful data examples.

Examples

```
# Define a two-stage stratified cluster sampling without
```

```

# replacement:
data(fpcdat)
des<-e.svydesign(data=fpcdat,ids=~psu+ssu,strata=~stratum,weights=~w,
  fpc=~fpc1+fpc2)

# Now compare SE (or CV%) sizes under different settings:

## 1) Default setting, i.e. Ultimate Cluster Approximation is off
svystatTM(des,~x+y+z,vartype=c("se","cvpct"))

## 2) Turn on the Ultimate Cluster Approximation, thus missing
##   the variance contribution from the second stage
##   (hence SR strata give no contribution at all):
old.op <- options("RG.ultimate.cluster"=TRUE)
svystatTM(des,~x+y+z,vartype=c("se","cvpct"))
options(old.op)

## 3) The "compromise solution" (see ?e.svydesign) i.e. retaining
##   only the leading contribution to the sampling variance (namely
##   the one arising from PSUs in SR strata and SSUs in not-SR strata):
des2<-e.svydesign(data=fpcdat,ids=~psu+ssu,strata=~stratum,weights=~w,
  fpc=~fpc1+fpc2, self.rep.str=~sr)
svystatTM(des2,~x+y+z,vartype=c("se","cvpct"))

# Therefore, sampling variances come out in the expected
# hierarchy: 1) > 3) > 2).

# Under default settings lonely PSUs produce errors in standard
# errors estimation (notice we didn't pass the fpcs):
data(fpcdat)
des.lpsu<-e.svydesign(data=fpcdat,ids=~psu+ssu,strata=~stratum,
  weights=~w)
## Not run:
svystatTM(des.lpsu,~x+y+z,vartype=c("se","cvpct"))

## End(Not run)

# This can be circumvented in different ways, namely:
old.op <- options("RG.lonely.psu"="adjust")
svystatTM(des.lpsu,~x+y+z,vartype=c("se","cvpct"))
options(old.op)

# or:
options("RG.lonely.psu"="average")
svystatTM(des.lpsu,~x+y+z,vartype=c("se","cvpct"))
options(old.op)

# or otherwise by collapsing strata inside planned
# estimation domains:
des.clps<-collapse.strata(design=des.lpsu,block.vars=~pl.domain)
svystatTM(des.clps,~x+y+z,vartype=c("se","cvpct"))

```

Description

The sbs data frame stores artificial sbs-like sampling data, while `sbs.frame` is the artificial sampling frame from which the sbs units have been drawn. They allow to run R code contained in the 'Examples' section of the ReGenesees package help pages.

Usage

```
data(sbs)
```

Format

The sbs data frame mimics data observed in a Structural Business Statistics survey, under a one-stage stratified unit sampling design. The sample is made up of 6909 units, for which the following 20 variables were observed:

`id` Identifier of the sampling units (enterprises), numeric

`public` Does the enterprise belong to the Public Sector? factor with levels 0 (No) and 1 (Yes)

`emp.num` Number of employees, numeric

`emp.c1` Number of employees classified into 5 categories, factor with levels [6, 9] (9, 19] (19, 49] (49, 99] (99, Inf] (notice that small enterprises with less than 6 employees fell outside the scope of the survey)

`nace5` Economic Activity code with 5 digits, factor with 596 levels

`nace2` Economic Activity code with 2 digits, factor with 57 levels

`area` Territorial Division, factor with 24 levels

`cens` Flag identifying statistical units to be censused (hence defining take-all strata), factor with levels 0 (No) and 1 (Yes)

`region` Macroregion, factor with levels North Center South

`va.c1` Class of Value Added, factor with 27 levels

`va` Value Added, numeric (contains NAs)

`dom1` A planned estimation domain, factor with 261 levels (`dom1` crosses `nace2` and `emp.c1`)

`nace.macro` Economic Activity Macrosector, factor with levels Agriculture Industry Commerce Services

`dom2` A planned estimation domain, factor with 12 levels (`dom2` crosses `nace.macro` and `region`)

`strata` Stratification Variable, a factor with 664 levels (obtained by crossing variables `region`, `nace2`, `emp.c1` and `cens`)

`va.imp1` Value Added Imputed1, numeric (NAs were replaced with average values computed inside imputation strata obtained by crossing `region`, `nace.macro`, `emp.c1`)

`va.imp2` Value Added Imputed2, numeric (NAs were replaced with median values computed inside imputation strata obtained by crossing `region`, `nace.macro`, `emp.c1`)

`y` A numeric variable correlated with `va`

`weight` Direct weights, numeric

`fpc` Finite Population Corrections (given as sampling fractions inside strata), numeric

`ent` Convenience numeric variable identically equal to 1 (sometimes useful, e.g. to estimate the total number of enterprises)

`dom2` An unplanned estimation domain, factor with 4 levels

The `sbs.frame` sampling frame (from which sbs units have been drawn) contains 17318 units.

Examples

```
data(sbs)
str(sbs)
str(sbs.frame)
```

svystatL

Estimation of Complex Estimators in Subpopulations

Description

Computes estimates, standard errors and confidence intervals for Complex Estimators in subpopulations. A Complex Estimator can be any analytic function of (Horvitz-Thompson or Calibration) estimators of Totals and Means.

Usage

```
svystatL(design, expr, by = NULL,
         vartype = c("se", "cv", "cvpct", "var"),
         conf.int = FALSE, conf.lev = 0.95, deff = FALSE,
         na.rm = FALSE)
```

```
## S3 method for class 'svystatL'
coef(object,...)
## S3 method for class 'svystatL'
SE(object,...)
## S3 method for class 'svystatL'
VAR(object,...)
## S3 method for class 'svystatL'
cv(object,...)
## S3 method for class 'svystatL'
deff(object,...)
## S3 method for class 'svystatL'
confint(object,...)
```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
expr	R expression defining the Complex Estimator (see 'Details').
by	Formula specifying the variables that define the "estimation domains". If <code>NULL</code> (the default option) estimates refer to the whole population.
vartype	character vector specifying the desired variability estimators. It is possible to choose one or more of: standard error ('se', the default), coefficient of variation ('cv'), percent coefficient of variation ('cvpct'), or variance ('var').
conf.int	Compute confidence intervals for the estimates? The default is <code>FALSE</code> .
conf.lev	Probability specifying the desired confidence level: the default value is 0.95.
deff	Should the design effect be computed? The default is <code>FALSE</code> (see 'Details').
na.rm	Should missing values (if any) be removed from the variables of interest? The default is <code>FALSE</code> (see 'Details').

object	An object of class svystatL.
...	Additional arguments to coef, ..., confint methods (if any).

Details

This function computes weighted estimates for Complex Estimators using suitable weights depending on the class of design: calibrated weights for class `cal.analytic` and direct weights otherwise. Standard errors are calculated using the Taylor linearization technique.

The mandatory argument `expr`, which identifies the Complex Estimator, must be an object of class `expression`. It can be specified just a single Complex Estimator at a time, i.e. `length(expr)` must be equal to 1. Any analytic function of estimators of Totals and Means is allowed.

Inside `expr` the estimator of the Total of a variable is simply represented by the *name* of the variable itself. To represent the estimator of the Mean of a variable `y`, the expression `y/ones` has to be used (ones being the convenience name of an artificial variable whose value is 1 for each sampling unit, so that its Total estimator actually estimates the population total). Variables referenced inside `expr` have obviously to belong to `design` and must be `numeric`.

At a minimal level, `svystatL` can be used to estimate Totals, Means and Ratios, thus reproducing the same results achieved by using the corresponding dedicated functions `svystatTM` and `svystatR`. For instance, calling `svystatL(design, expression(y/x))` is equivalent to invoking `svystatR(design, ~y, ~x)`, while using `svystatL(design, expression(y/ones))` or `svystatTM(design, ~y, estimator = "Mean")` achieves an identical result.

The optional argument `by` specifies the variables that define the "estimation domains", that is the subpopulations for which the estimates are to be calculated. If `by=NULL` (the default option), the estimates produced by `svystatL` refer to the whole population. Estimation domains must be defined by a formula: for example the statement `by=~B1:B2` selects as estimation domains the subpopulations determined by crossing the modalities of variables `B1` and `B2`. Notice that a formula like `by=~B1+B2` will be automatically translated into the factor-crossing formula `by=~B1:B2`: if you need to compute estimates for domains `B1` and `B2` *separately*, you have to call `svystatL` twice. The design variables referenced by `by` (if any) should be of type `factor`, otherwise they will be coerced.

The `conf.int` argument allows to request the confidence intervals for the estimates. By default `conf.int=FALSE`, that is the confidence intervals are not provided.

Whenever confidence intervals are requested (i.e. `conf.int=TRUE`), the desired confidence level can be specified by means of the `conf.lev` argument. The `conf.lev` value must represent a probability ($0 \leq \text{conf.lev} \leq 1$) and its default is chosen to be 0.95.

The optional argument `deff` allows to request the design effect [Kish 1995] for the estimates. By default `deff=FALSE`, that is the design effect is not provided. The design effect of an estimator is defined as the ratio between the variance of the estimator under the actual sampling design and the variance that would be obtained for an 'equivalent' estimator under a hypothetical simple random sampling without replacement of the same size. To obtain an estimate of the design effect comparing to simple random sampling "*with replacement*", one must use `deff="replace"`.

For nonlinear estimators, the design effect is estimated on the linearized version of the estimator (that is for the estimator of the total of the linearized variable, aka "Woodruff transform").

When dealing with domain estimation, the design effects referring to a given subpopulation are currently computed by taking the ratios between the actual variance estimates and those that would have been obtained if a simple random sampling were carried out *within* that subpopulation. This is the same as the `srssubpop` option for Stata's function `estat`.

Missing values (NA) in interest variables should be avoided. If `na.rm=FALSE` (the default) they generate NAs in estimates (or even an error, if design is calibrated). If `na.rm=TRUE`, observations

containing NAs are dropped, and estimates gets computed on non missing values only. This implicitly assumes that missing values hit interest variables *completely at random*: should this be not the case, computed estimates would be *biased*.

Value

An object inheriting from the `data.frame` class, whose detailed structure depends on input parameters' values.

Author(s)

Diego Zardetto

References

Sarndal, C.E., Swensson, B., Wretman, J. (1992) *"Model Assisted Survey Sampling"*, Springer Verlag.

Kish, L. (1995). *"Methods for design effects"*. Journal of Official Statistics, Vol. 11, pp. 55-77.

See Also

Estimators of Totals and Means [svystatTM](#), Ratios between Totals [svystatR](#) and Quantiles [svystatQ](#).

Examples

```
# Creation of a design object:
data(data.examples)
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# A first example: the ratio estimator of a Total,
# which relies on auxiliary information.
# Suppose you want to estimate the total of income
# and you know from an external source that the
# population size is, say, 1E6:
svystatL(des,expression(1E6*(income/ones)),vartype="cvpct")

# By comparing the latter result with the ordinary
# estimator of the mean one can see the variance
# reduction stemming from the correlation between
# numerator and denominator:
svystatTM(des,~income,vartype="cvpct")

# Creation of another design object:
data(sbs)
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,
  fpc=~fpc)

# A complex example: estimation of the Population Standard
# Deviation of a variable.
# Suppose you want to estimate the standard deviation of the
# population distribution of value added (va.imp2):
des<-des.addvars(des,va.imp2.sq=va.imp2^2)
svystatL(des,expression( sqrt( (ones/(ones-1))*
  ( (va.imp2.sq/ones)-(va.imp2/ones)^2 )
```

```

    )
  ), conf.int=TRUE)

# The estimate above and the associated confidence interval (which
# involves the estimate of the sampling variance of the complex
# estimator) turn out to be very sound: indeed the TRUE value of the
# parameter is:
sd(sbs.frame$va.imp2)

```

svystatQ

*Estimation of Quantiles in Subpopulations***Description**

Calculates estimates, standard errors and confidence intervals for quantiles of numeric variables in subpopulations.

Usage

```

svystatQ(design, y, probs = c(0.25, 0.5, 0.75), by = NULL,
         vartype = c("se", "cv", "cvpct", "var"),
         conf.lev = 0.95, na.rm = FALSE,
         ties=c("discrete", "rounded"))

```

```

## S3 method for class 'svystatQ'
coef(object,...)
## S3 method for class 'svystatQ'
SE(object,...)
## S3 method for class 'svystatQ'
VAR(object,...)
## S3 method for class 'svystatQ'
cv(object,...)
## S3 method for class 'svystatQ'
confint(object,...)

```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
y	Formula defining the interest variable.
probs	Vector of probability values to be used to calculate the quantiles estimates. The default value selects estimates of quartiles.
by	Formula specifying the variables that define the "estimation domains". If <code>NULL</code> (the default option) estimates refer to the whole population.
vartype	character vector specifying the desired variability estimators. It is possible to choose one or more of: standard error (<code>'se'</code> , the default), coefficient of variation (<code>'cv'</code>), percent coefficient of variation (<code>'cvpct'</code>), or variance (<code>'var'</code>).
conf.lev	Probability specifying the desired confidence level: the default value is 0.95.
na.rm	Should missing values (if any) be removed from the variable of interest? The default is <code>FALSE</code> (see <code>'Details'</code>).

<code>ties</code>	How should duplicated observed values be treated? Select 'discrete' for a genuinely discrete interest variable and 'rounded' for a continuous one.
<code>object</code>	An object of class <code>svystatQ</code> .
<code>...</code>	Additional arguments to <code>coef</code> , ..., <code>confint</code> methods (if any).

Details

This function calculates weighted estimates for the quantiles of a quantitative variable using suitable weights depending on the class of design: calibrated weights for class `cal.analytic` and direct weights otherwise.

Standard errors are calculated using the so-called "Woodruff method" [Woodruff 52][Sarndal, Swensson, Wretman 92]: (i) first a confidence interval (at a given confidence level $1-\alpha$) is constructed for the relative frequency of units with values below the estimated quantile, (ii) then the inverse of the estimated cumulative relative frequency distribution (ECDF) is used to map this interval to a confidence interval for the quantile, (iii) lastly the desired standard error is estimated by dividing the length of the obtained confidence interval by the value $2 \cdot \text{qnorm}(1-\alpha/2)$. Notice that the procedure above builds, in general, asymmetric confidence intervals around the estimated quantiles.

The mandatory argument `y` identifies the variable of interest, that is the variable for which estimates of quantiles have to be calculated. The design variable referenced by `y` must be numeric.

The optional argument `probs` specifies the probability values ($0.001 \leq \text{probs}[i] \leq 0.999$) corresponding to the quantiles one wants to estimate; the default option selects quartiles.

The optional argument `by` specifies the variables that define the "estimation domains", that is the subpopulations for which the estimates are to be calculated. If `by=NULL` (the default option), the estimates produced by `svystatTM` refer to the whole population. Estimation domains must be defined by a formula: for example the statement `by=~B1:B2` selects as estimation domains the subpopulations determined by crossing the modalities of variables `B1` and `B2`. Notice that a formula like `by=~B1+B2` will be automatically translated into the factor-crossing formula `by=~B1:B2`: if you need to compute estimates for domains `B1` and `B2` *separately*, you have to call `svystatQ` twice. The design variables referenced by `by` (if any) should be of type factor, otherwise they will be coerced.

The `conf.int` argument allows to request the confidence intervals for the estimates. By default `conf.int=FALSE`, that is the confidence intervals are not provided.

Whenever confidence intervals are requested (i.e. `conf.int=TRUE`), the desired confidence level can be specified by means of the `conf.lev` argument. The `conf.lev` value must represent a probability ($0 \leq \text{conf.lev} \leq 1$) and its default is chosen to be 0.95.

Missing values (NA) in interest variables should be avoided. If `na.rm=FALSE` (the default) they generate NAs in estimates (or even an error, if design is calibrated). If `na.rm=TRUE`, observations containing NAs are dropped, and estimates gets computed on non missing values only. This implicitly assumes that missing values hit interest variables *completely at random*: should this be not the case, computed estimates would be *biased*.

Argument `ties` addresses the problem of how to treat duplicated observed values (if any) when computing the ECDF. Option 'discrete' (the default) is appropriate when the variable of interest is genuinely discrete, while 'rounded' is a better choice for a continuous variable, i.e. when duplicates stem from rounding. In the first case the ECDF will show a vertical step corresponding to a duplicated value, in the second a smoother shape will be achieved by linear interpolation.

Value

An object inheriting from the `data.frame` class, whose detailed structure depends on input parameters' values.

Author(s)

Diego Zardetto

References

Woodruff, R.S. (1952) "*Confidence Intervals for Medians and Other Position Measures*", Journal of the American Statistical Association, Vol. 47, No. 260, pp. 635-646.

Sarndal, C.E., Swensson, B., Wretman, J. (1992) "*Model Assisted Survey Sampling*", Springer Verlag.

See Also

Estimators of Totals and Means [svystatTM](#), Ratios between Totals [svystatR](#) and Complex Analytic Functions of Totals and/or Means [svystatL](#).

Examples

```
# Creation of a design object:
data(data.examples)
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Estimate of the deciles of the income variable for
# the whole population:
svystatQ(des,~income,probs=seq(0.1,0.9,0.1),ties="rounded")

# Another design object:
data(sbs)
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,
  fpc=~fpc)

# Estimation of the median value added
# for economic activity macro-sectors:
svystatQ(des,~va.imp2,probs=0.5,by=~nace.macro,
  ties="rounded",vartype="cvpct")

# Estimation of the Interquartile Range (IQR) of the number
# of employees for economic activity macro-sectors:
apply(svystatQ(des,~emp.num,probs=c(0.25,0.75),by=~nace.macro)[,2:3],1,diff)
```

svystatR

Estimation of Ratios in Subpopulations

Description

Calculates estimates, standard errors and confidence intervals for ratios between totals in subpopulations.

Usage

```
svystatR(design, num, den, by = NULL, cross = FALSE,
         vartype = c("se", "cv", "cvpct", "var"),
         conf.int = FALSE, conf.lev = 0.95, deff = FALSE,
         na.rm = FALSE)

## S3 method for class 'svystatR'
coef(object,...)
## S3 method for class 'svystatR'
SE(object,...)
## S3 method for class 'svystatR'
VAR(object,...)
## S3 method for class 'svystatR'
cv(object,...)
## S3 method for class 'svystatR'
deff(object,...)
## S3 method for class 'svystatR'
confint(object,...)
```

Arguments

<code>design</code>	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
<code>num</code>	Formula defining the numerator variables for the ratio estimators.
<code>den</code>	Formula defining the denominator variables for the ratio estimators.
<code>by</code>	Formula specifying the variables that define the "estimation domains". If <code>NULL</code> (the default option) estimates refer to the whole population.
<code>cross</code>	Should ratios be estimated for all the pairs of variables in ' <code>num</code> ' and ' <code>den</code> '? The default is <code>FALSE</code> , meaning that ratios get estimated parallel-wise (see ' <code>Details</code> ').
<code>vartype</code>	character vector specifying the desired variability estimators. It is possible to choose one or more of: standard error (' <code>se</code> '), the default, coefficient of variation (' <code>cv</code> '), percent coefficient of variation (' <code>cvpct</code> '), or variance (' <code>var</code> ').
<code>conf.int</code>	Compute confidence intervals for the estimates? The default is <code>FALSE</code> .
<code>conf.lev</code>	Probability specifying the desired confidence level: the default value is 0.95.
<code>deff</code>	Should the design effect be computed? The default is <code>FALSE</code> (see ' <code>Details</code> ').
<code>na.rm</code>	Should missing values (if any) be removed from the variables of interest? The default is <code>FALSE</code> (see ' <code>Details</code> ').
<code>object</code>	An object of class <code>svystatR</code> .
<code>...</code>	Additional arguments to <code>coef</code> , ..., <code>confint</code> methods (if any).

Details

This function computes weighted estimates for Ratios between Totals using suitable weights depending on the class of `design`: calibrated weights for class `cal.analytic` and direct weights otherwise. Standard errors are calculated using the Taylor linearization technique.

The mandatory argument `num` (`den`) identifies the variables whose totals appear as numerators (denominators) in the Ratio estimators: the corresponding formula must be of the type `num = ~num.1 + ... + num.k` (`den = ~den.1 + ... + den.l`). The design variables referenced by `num` (`den`) must be numeric.

If `cross=TRUE`, the function computes estimates for *all* the Ratios between pairs of variables coming from `num` and `den` (that is $k \times l$ estimates for the formulae above). If, on the contrary, `cross=FALSE` (the default), Ratios get estimated parallel-wise and R recycling rule is applied whenever $k \neq l$: for the formulae above, this generates r Ratios, where $r = \max(k, l)$.

The optional argument `by` specifies the variables that define the "estimation domains", that is the subpopulations for which the estimates are to be calculated. If `by=NULL` (the default option), the estimates produced by `svystatR` refer to the whole population. Estimation domains must be defined by a formula: for example the statement `by=~B1:B2` selects as estimation domains the subpopulations determined by crossing the modalities of variables `B1` and `B2`. Notice that a formula like `by=~B1+B2` will be automatically translated into the factor-crossing formula `by=~B1:B2`: if you need to compute estimates for domains `B1` and `B2` *separately*, you have to call `svystatR` twice. The design variables referenced by `by` (if any) should be of type `factor`, otherwise they will be coerced.

The `conf.int` argument allows to request the confidence intervals for the estimates. By default `conf.int=FALSE`, that is the confidence intervals are not provided.

Whenever confidence intervals are requested (i.e. `conf.int=TRUE`), the desired confidence level can be specified by means of the `conf.lev` argument. The `conf.lev` value must represent a probability ($0 \leq \text{conf.lev} \leq 1$) and its default is chosen to be 0.95.

The optional argument `deff` allows to request the design effect [Kish 1995] for the estimates. By default `deff=FALSE`, that is the design effect is not provided. The design effect of an estimator is defined as the ratio between the variance of the estimator under the actual sampling design and the variance that would be obtained for an 'equivalent' estimator under a hypothetical simple random sampling without replacement of the same size. To obtain an estimate of the design effect comparing to simple random sampling "*with replacement*", one must use `deff="replace"`.

Being Ratios nonlinear estimators, the design effect is estimated on the linearized version of the estimator (that is: for the estimator of the total of the linearized variable, aka "Woodruff transform"). When dealing with domain estimation, the design effects referring to a given subpopulation are currently computed by taking the ratios between the actual variance estimates and those that would have been obtained if a simple random sampling were carried out *within* that subpopulation. This is the same as the `srssubpop` option for Stata's function `estat`.

Missing values (NA) in interest variables should be avoided. If `na.rm=FALSE` (the default) they generate NAs in estimates (or even an error, if design is calibrated). If `na.rm=TRUE`, observations containing NAs are dropped, and estimates gets computed on non missing values only. This implicitly assumes that missing values hit interest variables *completely at random*: should this be not the case, computed estimates would be *biased*. Notice that the `na.rm=TRUE` option is only allowed for a single Ratio, i.e. if `num` and `den` references a *single* interest variable.

Value

An object inheriting from the `data.frame` class, whose detailed structure depends on input parameters' values.

Warning

It can happen that, in some subpopulations, the estimate of the Total of some `den` variables turns out to be zero. In such cases `svystatR` returns NaN for the corresponding estimates.

Author(s)

Diego Zardetto

References

- Sarndal, C.E., Swensson, B., Wretman, J. (1992) *"Model Assisted Survey Sampling"*, Springer Verlag.
- Kish, L. (1995). *"Methods for design effects"*. Journal of Official Statistics, Vol. 11, pp. 55-77.

See Also

Estimators of Totals and Means [svystatTM](#), Quantiles [svystatQ](#) and Complex Analytic Functions of Totals and/or Means [svystatL](#).

Examples

```
# Creation of a design object:
data(sbs)
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,
  fpc=~fpc)

# Estimation of the average value added per employee
# at the nation level:
svystatR(des,~va.imp2,~emp.num)

# The same as above by economic activity macro-sector:
svystatR(des,~va.imp2,~emp.num,~nace.macro,vartype="cvpct")

# Another design object:
data(data.examples)
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Estimation of the ratios y1/x1, y1/x2, y2/x1 and y2/x2 by region,
# notice the use of argument cross:
svystatR(des,~y1+y2,~x1+x2,by=~regcod,cross=TRUE)

# ... compare the latter with the default (i.e. cross=FALSE)
svystatR(des,~y1+y2,~x1+x2,by=~regcod)

# Estimation of the ratios z/x1, z/x2 e z/x3
# for the whole population (notice the recycling rule):
svystatR(des,~z,~x1+x2+x3,conf.int=TRUE)

# Estimators of means can be thought as
# estimators of ratios:
svystatTM(des,~income,estimator="Mean")
svystatR(des.addvars(des,ones=1),num=~income,den=~ones)
```

svystatTM

Estimation of Totals and Means in Subpopulations

Description

Computes estimates, standard errors and confidence intervals for Totals and Means in subpopulations.

Usage

```
svystatTM(design, y, by = NULL, estimator = c("Total", "Mean"),
          vartype = c("se", "cv", "cvpct", "var"),
          conf.int = FALSE, conf.lev = 0.95, deff = FALSE,
          na.rm = FALSE)

## S3 method for class 'svystatTM'
coef(object,...)
## S3 method for class 'svystatTM'
SE(object,...)
## S3 method for class 'svystatTM'
VAR(object,...)
## S3 method for class 'svystatTM'
cv(object,...)
## S3 method for class 'svystatTM'
deff(object,...)
## S3 method for class 'svystatTM'
confint(object,...)
```

Arguments

design	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
y	Formula defining the variables of interest.
by	Formula specifying the variables that define the "estimation domains". If <code>NULL</code> (the default option) estimates refer to the whole population.
estimator	character specifying the desired estimator: it may be <code>'Total'</code> (the default) or <code>'Mean'</code> .
vartype	character vector specifying the desired variability estimators. It is possible to choose one or more of: standard error (<code>'se'</code> , the default), coefficient of variation (<code>'cv'</code>), percent coefficient of variation (<code>'cvpct'</code>), or variance (<code>'var'</code>).
conf.int	Compute confidence intervals for the estimates? The default is <code>FALSE</code> .
conf.lev	Probability specifying the desired confidence level: the default value is 0.95.
deff	Should the design effect be computed? The default is <code>FALSE</code> (see <code>'Details'</code>).
na.rm	Should missing values (if any) be removed from the variables of interest? The default is <code>FALSE</code> (see <code>'Details'</code>).
object	An object of class <code>svystatTM</code> .
...	Additional arguments to <code>coef</code> , ..., <code>confint</code> methods (if any).

Details

This function computes weighted estimates for Totals and Means using suitable weights depending on the class of design: calibrated weights for class `cal.analytic` and direct weights otherwise. Standard errors for nonlinear estimators (e.g. calibration estimators) are calculated using the Taylor linearization technique.

The mandatory argument `y` identifies the variables of interest, that is the variables for which estimates are to be calculated. The corresponding formula should be of the type `y~var1+...+varn`. The design variables referenced by `y` should be numeric or factor (variables of other types - e.g.

character - will be coerced). It is admissible to specify for `y` "mixed" formulae that simultaneously contain quantitative (numeric) variables and qualitative (factor) variables.

To override the restriction to formulae of the type `y=~var1+. . .+varn`, the `AsIs` operator `I()` can be used (see 'Examples'). Though the latter opportunity could appear quite useful in some occasion, actually it should be almost always possible to find a work-around by using other functions of the **ReGenesees** package.

The optional argument `by` specifies the variables that define the "estimation domains", that is the subpopulations for which the estimates are to be calculated. If `by=NULL` (the default option), the estimates produced by `svystatTM` refer to the whole population. Estimation domains must be defined by a formula: for example the statement `by=~B1:B2` selects as estimation domains the subpopulations determined by crossing the modalities of variables `B1` and `B2`. Notice that a formula like `by=~B1+B2` will be automatically translated into the factor-crossing formula `by=~B1:B2`: if you need to compute estimates for domains `B1` and `B2` *separately*, you have to call `svystatTM` twice. The design variables referenced by `by` (if any) should be of type factor, otherwise they will be coerced.

The optional argument `estimator` makes it possible to select the desired estimator. If `estimator="Total"` (the default option), `svystatTM` calculates, for a given variable of interest `vark`, the estimate of the total (when `vark` is numeric) or the estimate of the absolute frequency distribution (when `vark` is factor). Similarly, if `estimator="Mean"`, the function calculates the estimate of the mean (when `vark` is numeric) or the the estimate of the relative frequency distribution (when `vark` is factor).

The `conf.int` argument allows to request the confidence intervals for the estimates. By default `conf.int=FALSE`, that is the confidence intervals are not provided.

Whenever confidence intervals are requested (i.e. `conf.int=TRUE`), the desired confidence level can be specified by means of the `conf.lev` argument. The `conf.lev` value must represent a probability ($0 \leq \text{conf.lev} \leq 1$) and its default is chosen to be 0.95.

The optional argument `deff` allows to request the design effect [Kish 1995] for the estimates. By default `deff=FALSE`, that is the design effect is not provided. The design effect of an estimator is defined as the ratio between the variance of the estimator under the actual sampling design and the variance that would be obtained for an 'equivalent' estimator under a hypothetical simple random sampling without replacement of the same size. To obtain an estimate of the design effect comparing to simple random sampling "*with replacement*", one must use `deff="replace"`.

Understanding what 'equivalent' estimator actually means is straightforward when dealing with Horvitz-Thompson estimators of Totals and Means. This is not the case when, on the contrary, the estimator to which the `deff` refers is a nonlinear estimator (e.g. for Calibration estimators of Totals and Means). In such cases, the standard approach is to use as 'equivalent' estimator the linearized version of the original estimator (that is: the estimator of the total of the linearized variable, aka "Woodruff transform").

When dealing with domain estimation, the design effects referring to a given subpopulation are currently computed by taking the ratios between the actual variance estimates and those that would have been obtained if a simple random sampling were carried out *within* that subpopulation. This is the same as the `srssubpop` option for Stata's function `estat`.

Missing values (NA) in interest variables should be avoided. If `na.rm=FALSE` (the default) they generate NAs in estimates (or even an error, if design is calibrated). If `na.rm=TRUE`, observations containing NAs are dropped, and estimates gets computed on non missing values only. This implicitly assumes that missing values hit interest variables *completely at random*: should this be not the case, computed estimates would be *biased*. Notice that the `na.rm=TRUE` option is only allowed if `y` references a *single* interest variable.

Value

An object inheriting from the `data.frame` class, whose detailed structure depends on input parameters' values.

Author(s)

Diego Zardetto

References

Sarndal, C.E., Swensson, B., Wretman, J. (1992) *"Model Assisted Survey Sampling"*, Springer Verlag.

Kish, L. (1995). *"Methods for design effects"*. Journal of Official Statistics, Vol. 11, pp. 55-77.

See Also

Estimators of Ratios between Totals [svystatR](#), Quantiles [svystatQ](#), and Complex Analytic Functions of Totals and/or Means [svystatL](#).

Examples

```
data(data.examples)

# Creation of a design object:
des<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Estimation of the total of 3 quantitative variables for the whole
# population:
svystatTM(des,~y1+y2+y3)

# Estimation of the total of the same 3 variables by region, with SE
# and CV%:
svystatTM(des,~y1+y2+y3,~regcod,vartype=c("se","cvpct"))

# Estimation of the mean of the same 3 variables by marstat and sex:
svystatTM(des,~y1+y2+y3,~marstat:sex,estimator="Mean")

# Estimation of the absolute frequency distribution of the qualitative
# variable age5c for the whole population, with the design effect:
svystatTM(des,~age5c,deff=TRUE)

# MARGINAL relative frequency distributions
# Estimation of the relative frequency distribution of the qualitative
# variable age5c for the whole population:
svystatTM(des,~age5c,estimator="Mean")

# CONDITIONAL relative frequency distributions
# Estimation of the relative frequency distribution of the qualitative
# variable marstat by sex:
svystatTM(des,~marstat,~sex,estimator="Mean")
```

```

# JOINT relative frequency distributions
# Estimation of the relative frequency of the joint distribution of sex
# and marstat:
# First Solution (using the AsIs operator I()):
svystatTM(des, ~I(sex:marstat), estimator="Mean")
# Second Solution (adding a new variable to des):
des2 <- des.addvars(des, sex.marstat=sex:marstat)
svystatTM(des2, ~sex.marstat, estimator="Mean")

# Estimation of the mean income inside provinces, with confidence intervals
# at a confidence level of 0.9:
svystatTM(des, ~income, ~procod, estimator="Mean", conf.int=TRUE, conf.lev=0.9)

# Quantitative and qualitative variables together: estimation of the
# total of income and of the absolute frequency distribution of sex,
# by marstat:
svystatTM(des, ~income+sex, ~marstat)

# Under default settings lonely PSUs produce errors in standard
# errors estimation (notice we didn't pass the fpcs):
data(fpcdat)
des.lpsu <- e.svydesign(data=fpcdat, ids=~psu+ssu, strata=~stratum,
  weights=~w)
## Not run:
svystatTM(des.lpsu, ~x+y+z, vartype=c("se", "cvpct"))

## End(Not run)

# This can be circumvented in different ways, namely:
old.op <- options("RG.lonely.psu"="adjust")
svystatTM(des.lpsu, ~x+y+z, vartype=c("se", "cvpct"))

# or otherwise:
options("RG.lonely.psu"="average")
svystatTM(des.lpsu, ~x+y+z, vartype=c("se", "cvpct"))
options(old.op)

# but see also ?collapse.strata for a better alternative.

```

weights

Retrieve Sampling Units Weights

Description

Extracts the *current* weights of units belonging to a survey design object.

Usage

```
weights(object, ...)
```


Arguments

object	Object of class <code>analytic</code> (or inheriting from it) containing survey data and sampling design metadata.
...	Arguments for future expansion.

Details

The *current* weights of object are, by definition, those weights that would be used for estimation purposes on that object (e.g. by functions `svyestatTM`, `svyestatR`, `svyestatQ`, `svyestatL`, ...). The nature of such weights depends on the class of object: calibrated weights for class `cal.analytic` and direct weights otherwise.

Value

A vector of weights, whose components are positionally tied to the sampling units belonging to object.

Note

If object has undergone multiple, subsequent calibration steps, the function will return the output weights generated by the *last* calibration step.

Author(s)

Diego Zardetto

See Also

Function `g.range` to assess the range of the g-weights of a calibrated design object.

Examples

```
# Creation of the object to be calibrated:
data(data.examples)
exdes<-e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
  weights=~weight)

# Retrieve the weights and summarize their distribution:
summary(weights(exdes))

# Now calibrate (global solution) on the joint distribution of sex
# and marstat (totals in pop03):
excal.1st<-e.calibrate(design=exdes,df.population=pop03,
  calmodel=~marstat:sex-1,calfun="linear",bounds=bounds)

# Retrieve the current weights (i.e. the calibrated ones) and
# summarize their distribution:
summary(weights(excal.1st))

# Now calibrate once again, this time on the marginal distribution
# of age in 5 classes (age5c) inside provinces (procod) (totals in pop06p)
# with the iterative solution, the logit distance and bounds=c(0.5, 1.5):
excal.2nd<-e.calibrate(design=excal.1st,df.population=pop06p,
  calmodel=~age5c-1,partition=~procod,calfun="logit",
  bounds=c(0.5, 1.5))
```

```
# Notice that the print method correctly takes the calibration chain
# into account:
excal.2nd

# Now retrieve the current weights (i.e. the ones generated by the second
# calibration step) and summarize their distribution:
summary(weights(excal.2nd))
```

write.svystat

Export Survey Statistics

Description

Prints survey statistics to a file or connection.

Usage

```
write.svystat(x, ...)
```

Arguments

x	An object containing survey statistics.
...	Arguments to write.table

Details

This function is just a convenience wrapper to [write.table](#), designed to export objects which have been returned by survey statistics functions (e.g. [svystatTM](#), [svystatR](#), [svystatQ](#), [svystatL](#)).

Author(s)

Diego Zardetto

See Also

[write.table](#) and the 'R Data Import/Export' manual.

Examples

```
# Creation of a design object:
data(sbs)
des<-e.svydesign(data=sbs,ids=~id,strata=~strata,weights=~weight,
  fpc=~fpc)

# Estimation of the average value added per employee
# for economic activity region and macro-sectors,
# with SE, CV% and standard confidence intervals:
stat <- svystatR(des,~va.imp2,~emp.num,by=~region:nace.macro,
  vartype=c("se","cvpct"),conf.int=TRUE)
stat

# In order to export the summary statistics above
```

```

# into a CSV file for input to Excel one can use:
## Not run:
write.csv(stat,file="stat.csv",sep=";")

## End(Not run)

# ...and to read this file back into R one needs
## Not run:
stat.back <- read.table("stat.csv",header=TRUE,sep=";",
                        check.names=FALSE)
stat.back

## End(Not run)

# Notice, however, that the latter object has
# lost a lot of meta-data as compared to the
# original one, so that e.g.:
## Not run:
confint(stat.back)

## End(Not run)

# ...while, on the contrary:
confint(stat)

```

%into%*Compress Nested Factors*

Description

The special binary operator %into% transforms nested factors in such a way as to reduce the dimension and/or the sparseness of the model matrix of a calibration problem.

Usage

```

inner %into% outer
"%into%"(inner, outer)

```

Arguments

inner	Factor with levels nested into outer (see 'Details').
outer	Factor whose levels are an aggregation of those in inner (see 'Details').

Details

Arguments inner and outer must be both factors and must have the same length. Moreover, inner has to be *strictly nested* into outer. Nesting is defined by treating elements in inner and outer as if they were positionally tied (i.e. as if they belonged to columns of a given dataframe). The definition is as follows:

inner and outer are strictly nested if, and only if, 1) every set of equal elements in inner correspond to a set of equal elements in outer, and 2) inner has *more* non-empty levels than outer.

If inner and outer do not fulfill the conditions above, evaluating inner %into% outer gives an error.

Suppose inner is actually nested into outer and define `inner.in.outer <- inner %into% outer`. The output factor `inner.in.outer` is built by recoding inner levels in such a way that each of them is mapped into the integer which represents its order inside the corresponding level of outer (see 'Examples'). As a consequence, the levels of `inner.in.outer` will be `1:n.max`, being `n.max` the *maximum* number of levels of inner tied to a level of outer. Since this number is generally considerably smaller than the number of levels of inner, `inner.in.outer` can be seen as a *compressed* representation of inner. Obviously, compression comes at a price: indeed `inner.in.outer` can now be used to identify a level of inner only *inside* a given level of outer (see 'Examples').

The usefulness of the %into% operator emerges in the calibration context. As we already documented in [e.calibrate](#), factorizing a calibration problem (i.e. exploiting the `partition` argument of `e.calibrate`) determines a significant reduction in computation complexity, especially for big surveys. Now, it is sometimes the case that a calibration model is actually factorizable, even if this property is not self-apparent, due to factor nesting. In such cases, anyway, trying naively to factorize the outer variable(s) typically leads to very big and sparse model matrices (as well as population totals dataframes), with the net result of washing-out the expected efficiency gain. A better alternative is to exploit the %into% operator in order to *compress* the inner variable in such a way that the outer variable can be actually factorized *without* giving rise to huge and sparse matrices. Section 'Examples' reports some practical illustration of the above line of reasoning.

Value

A factor with levels `1:n.max`, being `n.max` the *maximum* number of levels of inner tied to a level of outer.

Author(s)

Diego Zardetto

See Also

Further examples can be found in the [fill.template](#) help page.

Examples

```
#####
## General properties of the %into% operator  #
#####
# First build a small dataframe with 2 nested factors representing
# regions and provinces:
dd <- data.frame(
  reg = factor( rep(LETTERS[1:3], c(6, 3, 1)) ),
  prov = factor( rep(letters[1:6], c(3, 2, 1, 2, 1, 1)) )
)

dd

# Since prov is strictly nested into reg we can compute:
prov.in.reg <- dd$prov %into% dd$reg
prov.in.reg

# Note that prov.in.reg has 3 levels because, as can be seen from dd,
# the maximum number of provinces inside regions is 3. Thus prov.in.reg
# is actually a compressed version of dd$prov (whose levels were 6)
```

```

# but, obviously, it can now be used to identify a province only inside
# a given region. This means that the the two factors below are identical (up
# to levels' labels):
dd$prov
interaction(prov.in.reg,dd$reg,drop=TRUE)

# Note that all the statements below generate errors:
## Not run:
dd$reg %into% dd$prov
dd$reg %into% dd$reg
dd$prov %into% dd$prov

## End(Not run)

#####
## A more useful (and complex) example from the calibration context #
#####
# First define a design object:
data(data.examples)
exdes <- e.svydesign(data=example,ids=~towcod+famcod,strata=~SUPERSTRATUM,
weights=~weight)

# Now suppose you have to perform a calibration process which
# exploits the following known population totals:
# 1) Joint distribution of sex and age10c (age in 10 classes)
#   at the region level;
# 2) Joint distribution of sex and age5c (age in 5 classes)
#   at the province level;
#
# The auxiliary variables corresponding to the population totals above
# can be symbolically represented by a calibration model like the following:
# ~(procod:age5c + regcod:age10c - 1):sex
#
# At first sight it seems that only the sex variable can be factorized
# in the model above. However if one observe that regions are an aggregation
# of provinces, one realizes that also the regcod variable can be factorized.
# Similarly, since categories of age5c are an aggregation of categories of
# age10c, age5c can be factorized too. In both cases, using the %into%
# operator will save computation time and memory usage.
# Let us see it in practice:
#
## 1) Global calibration (i.e. calmodel=~(procod:age5c + regcod:age10c - 1):sex,
# no partition variable, known totals stored in pop07):
t<-system.time(
  cal07<-e.calibrate(design=exdes,df.population=pop07,
    calmodel=~(procod:age5c + regcod:age10c - 1):sex,
    calfun="logit",bounds=c(0.2,1.8),aggregate.stage=2)
)

## 2) Partitioned calibration on the self evident variable sex only
# (i.e. calmodel=~procod:age5c + regcod:age10c - 1, partition=~sex,
# known totals stored in pop07p):
tp<-system.time(
  cal07p<-e.calibrate(design=exdes,df.population=pop07p,
    calmodel=~procod:age5c + regcod:age10c - 1,partition=~sex,
    calfun="logit",bounds=c(0.2,1.8),aggregate.stage=2)
)

```

```

## 3) Full partitioned calibration on variables sex, regcod and age5c
# by exploiting %into%.
# First add to the design object the new compressed factor variables
# involving nested factors, namely provinces inside regions...
exdes<-des.addvars(exdes,procod.in.regcod=procod %into% regcod)

# ...and age10c inside age5c:
exdes<-des.addvars(exdes,age10c.in.age5c=age10c %into% age5c)

# Now calibrate exploiting the new variables
# (i.e. calmodel=~procod.in.regcod + age10c.in.age5c - 1,
# partition=~sex:regcod:age5c, known totals stored inside cal07pp)
tpp<-system.time(
  cal07pp<-e.calibrate(design=exdes,df.population=pop07pp,
    calmodel=~procod.in.regcod + age10c.in.age5c - 1,
    partition=~sex:regcod:age5c,
    calfun="logit",bounds=c(0.2,1.8),aggregate.stage=2)
)

# Now compare execution times:
t
tp
tpp

# thus, tpp < tp < t, as expected.

```

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