R crash course - Visualization

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ggplot2 Basics

Single-variable Plots (usually distributions)

Two-variable Plots (points and lines)

Labels, Scales, and More

Maps

Dependencies

- ▶ Latest version (≥ 3.1.2) of R
 (free from https://www.r-project.org/)
- ► Latest version of Rstudio (also *free* from https://www.rstudio.com/)
- ► A bunch of *free* packages

```
# for general plotting
install.packages('tidyverse') # ggplot2
install.packages('scales')
# spacial visualization on maps
install.packages('ggmap')
# for data pre-processing and formatting
# (both dplyr and tidyr now included in tidyverse)
# install.packages('dplyr')
# install.packages('tidyr')
```

Visualization: Introduction

- There is more than one framework for thinking about data visualization, e.g.,
 - 1. Mapping (function) of points/vectors in 2D/3D surface/space
 - Function of inputs given as variables of a data set, geometries and aesthetics that describe visual markings, and a coordinate system that defines the location of each marking
- The first approach is widely used in scientific visualization (e.g., MATLAB, classical plotting function in R), but doesn't scale well with data
- ► The second approach, implemented in R with the ggplot2 package, is prefered when working with large scale data, but requires the data frame to be formatted in a specific manner (i.e., in the long format)

Quick Comparison: An Example

▶ We're given the following data as a result of some experiment

Time	Group A Score	Group B Score
1	2	3
2	6	5

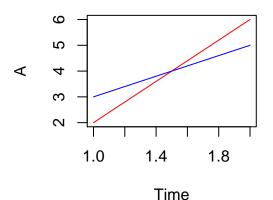
- ▶ We wish to plot the scores of each group, i.e., A and B on the vertical axis, with respect to *Time* on the horizontal axis, with different colors for each group
- First, create the data

```
Time <- c(1, 2)
A <- c(2, 6)
B <- c(3, 5)
```

Quick Comparison: The "Classic" Way

▶ Plot the coordinates of each vector A and B (no need to understand the code)

```
plot(Time, A, type='l', col='red')
lines(B, col='blue')
```



Quick Comparison: The ggplot2 Way

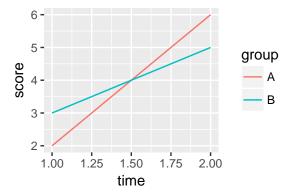
 Create data frame from the vectors, and tidy into long format (Note that the variables of interest are time, score, and group)

```
df <- tibble(time=Time, A=A, B=B )
df_tidy <- gather(df, key=group, value=score, A:B)</pre>
```

- What does df_tidy look like?
- Then, use ggplot2 to visualize the data frame (this is what we'll cover in this session, so you're not supposed to understand the following code)

ggplot2 Code and Plot

```
p <- ggplot(df_tidy, aes(x=time, y=score)) +
   geom_line(aes(color=group))
p</pre>
```



Quick Comparison: Thoughts?

- ▶ What would be the benefits/downsides of either approach?
- In what situation would you rather use one over the other?
- Can you come up with a better approach?

Some Common Visualization Tasks

- Most visualization tasks of a data scientist will fall into some combination of the following
 - Explore the distribution of some data with histograms/density plots
 - Plot points on a grid, lines in a plane with meaningful shape/linetype/size/colors
 - ► Transform coordinates (e.g., log-transform)
 - ▶ Make axis labels, tick-marks, etc. concise and meaningful
 - Plot geographic locations on a map
- The goal of this session is to become familiar with the basic concepts and building blocks, such that
 - 1. you can complete most of the required tasks by yourself
 - 2. when you need help, you know what to Google (and how to make sense of whatever it is you find)

ggplot2 Basics

Install and Load ggplot2

- Install and load the ggplot2 package like you would any other R package
- ggplot2 is a part of the tidyverse, so if you load tidyverse, ggplot2 is also loaded
- You can also, but don't have to, install and load the ggplot2 as a standalone package like you would any other R package

```
# Install, if you haven't already.
# Only need to do this once on a single machine.
install.packages('ggplot2')
# load package into workspace
library('ggplot2')
```

Datasets

- ► For this session, we'll mainly use the quakes and economics datasets that are included with your R installation and the mpg data set included with ggplot2
- ► The quakes dataset contains the location (long/lat), depth (Km), Richter Magnitude, and ID of reporting station for 1,000 seismic events near Fiji since 1964
- The economics dataset contains monthly US economic time series data
- ► The mpg dataset contains a subset of the fuel economy data made public via http://fueleconomy.gov
- Take a look at each data set and accompanying documentation

?quakes ?economics ?mpg

The ggplot Object

- The basic concept of ggplot2 is that you define a ggplot object, to which you can add various elements (e.g., data, visual markings, labels) as layers
- First, you start by defining an empty ggplot object with the initializing function ggplot(data)

p <- ggplot(data=quakes)</pre>

Note that

- ► The ggplot object is assigned to a variable (in this case p). The object exists in the workspace, and the plot is only generated when you call the object itself (i.e., if you type p in this case).
- An initial ggplot object is blank, equivalent to a brand new canvas.

aesthetic Mappings

- ▶ A key concept that follows the ggplot object is aesthetic (aes) mappings
- ▶ aes mappings tell the ggplot object where to find the inputs for certain elements of the plot (e.g., x-axis coordinates, colors)
- ▶ For example, from the quakes data set, if we want to have the depth on the x-axis and mag on the y-axis, we could initialize our ggplot object as

p <- ggplot(quakes, aes(x=depth, y=mag))</pre>

- Note that
 - aes() itself is a function that returns a mapping object, which is used as an argument in the ggplot() intialization
 - arguments within the aes() call can be column (variable) names
 - ▶ the ggplot object p is still blank: we haven't specified how we want x and y to be visualized

Adding geometries (and other elements)

- ► The building blocks of visual elements in ggplot2 are geometries
- geometries define markings (e.g., points, lines) to be made on the canvas
- Elements such as geometries are (literally) added to existing ggplot objects
- For example

```
p <- ggplot(quakes, aes(x=depth, y=mag)) +
  geom_point() # add 'point' geometry to p</pre>
```

 We'll explore different geometries and visual markings that can be addedd to ggplot objects in the following sections

Saving Plots

- You can save any plot from RStudio with Export > Save As ... or something like that
- That method of saving plots doesn't scale well, for obvious reasons
- Use ggsave() to save plots to files

```
ggsave('my_plot.png', width=5, height=5, plot=p)
```

- ggsave() is smart enough to determine the filetype from the extension of the filename that you specify (png in the above example)
- While many formats are supported, png and pdf are most commonly used
- Read the docs to harness the full power of ggsave()

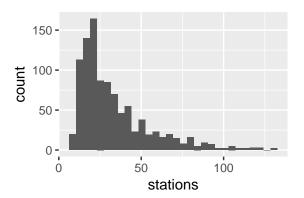
?ggsave

Single-variable Plots (usually distributions)

Histograms

▶ Plot a simple histogram by specifying the *x*-axis variable, and adding the histogram geometry with geom_histogram()

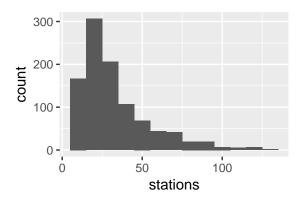
```
p <- ggplot(quakes, aes(x=stations)) +
  geom_histogram()
p</pre>
```



Histograms (cont'd)

Specify the size of each bin in the histogram with the binwidth argument in geom_histogram()

```
p <- ggplot(quakes, aes(x=stations)) +
   geom_histogram(binwidth=10)
p</pre>
```



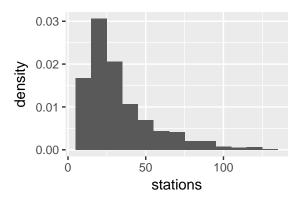
Histograms (cont'd)

- ▶ Notice that the default *y*-axis is count, i.e., the observation count of each bin
- ▶ This can be changed by specifying the aes() mapping of y
- ► For example, to generate a density histogram such that the points of each bin integrates to 1, set aes(y=..density..)
- For more options, see

?geom_histogram

Histogram with aes(y=..density..)

```
p <- ggplot(quakes, aes(x=stations)) +
  geom_histogram(binwidth=10, aes(y=..density..))
p</pre>
```



Exercise

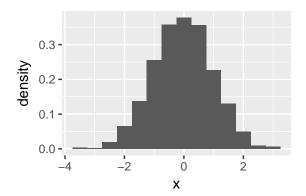
- Plot a density histogram of 1,000 random samples from a standard normal distribution using binwidth 0.5 (hint: use rnorm())
- 2. Use geom_density() to plot the (smooth) density of the population (pop) variable from the economics data

WARNING

- ▶ Solutions to the exercise are presented in the next slide
- ▶ Try the exercise before proceeding!

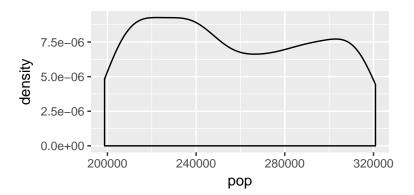
Solution 1

```
X <- tibble(x=rnorm(1000))
p <- ggplot(data=X, aes(x=x)) +
  geom_histogram(binwidth=0.5, aes(y=..density..))
p</pre>
```



Solution 2

```
p <- ggplot(data=economics, aes(x=pop)) +
  geom_density()
p</pre>
```

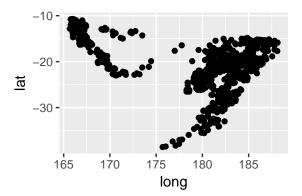




Points with geom_point()

Plot points on a 2D plane by specifying variables corresponding to the x and y-axis, and adding the point geometry with geom_point()

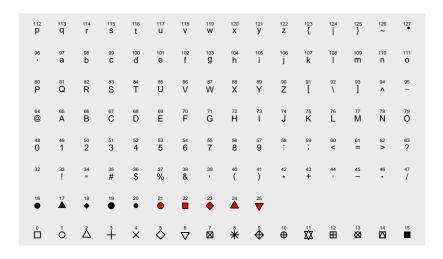
```
p <- ggplot(quakes, aes(x=long, y=lat)) +
  geom_point()
p</pre>
```



aesthetics for geom_point()

- Popular aesthetics for geom_point() are
 - ▶ alpha: point visibility; 0 = invisible, 1 = opaque
 - color: color of the points (try colors() to see a list of some pre-defined colors)
 - shape: shape of the points (predefined, see next slide for reference)
 - size: size of the points
 - ▶ fill: color used to fill-in the points (only applies to certain shapes, i.e., shape numbers 21 to 25)

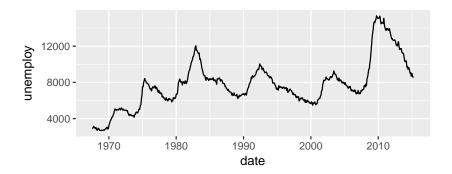
Reference: Shapes



Lines with geom_line()

Similarly, plot lines on a 2D plane by specifying variables corresponding to the x and y-axis, and adding the line geometry with geom_line()

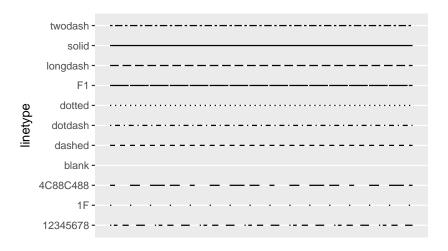
```
p <- ggplot(economics, aes(x=date, y=unemploy)) +
   geom_line()
p</pre>
```



aesthetics for geom_line()

- Popular aesthetics for geom_point() are
 - ▶ alpha: line visibility; 0 = invisible, 1 = opaque
 - ▶ color: color of the lines
 - linetype: shape of lines (predefined, see next slide for reference)
 - size: size (thickness) of the lines

Reference: Linetypes



A Note on data and aes() Arguments

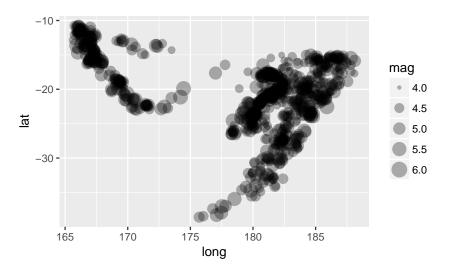
- ► The data and aes() arguments, can be declared globally in the ggplot() function, or locally in each geometry function
- Also, aesthetics can be either
 - mapped to a variable globally, i.e., in ggplot(aes())
 - ▶ mapped to a variable *locally*, i.e., in geom_*(aes()), or
 - defined explicitly for a local geom_*(), outside of aes()
- ▶ It's critical to understand the difference between 'mapping' an aesthetic and 'explicitly defining' one

Example: Global aes() mapping

```
p <- ggplot(quakes, aes(x=long, y=lat, size=mag)) +
  geom_point(alpha=.3)
p</pre>
```

- the data and aesthetic mappings for x, y, and size are defined globally in ggplot()
- this means any geom_* added to this ggplot will have the specified x, y, and size aesthetic mappings, unless assigned otherwise within their own geom_*() function
- the alpha aesthetic for geom_point, on the other hand, is defined explicitly (i.e., it is set to 0.3, and not mapped to a variable)

Example: Global aes() mapping (figure)

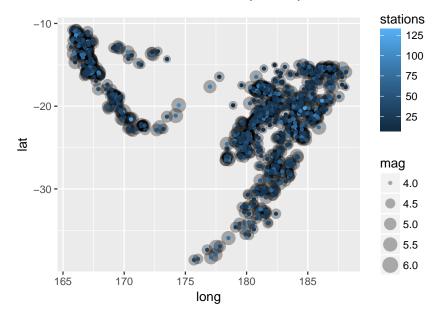


Example: Local aes() mapping

```
p <- ggplot(quakes, aes(x=long, y=lat)) +
  geom_point(alpha=.3, aes(size=mag)) +
  geom_point(size=1, aes(color=stations))
p</pre>
```

- Here, the data and aesthetic mappings for x and y are defined globally in ggplot()
- ▶ But the aesthetic mapping/value for size is defined locally for each specific geom_point()
- ► The first geom_point() maps size to the mag variable, which means the size of the points will depend on the corresponding value of mag
- ► The second geom_point() explicitly assigns size to the fixed value 1, but maps the color aesthetic to the stations variable
- What do you think the plot will look like?

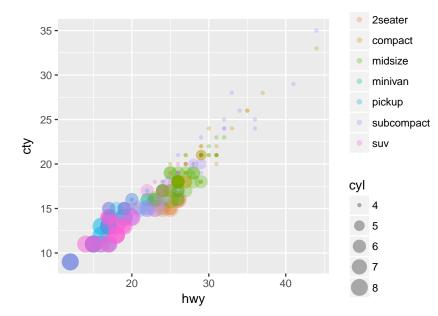
Example: Local aes() mapping (figure)



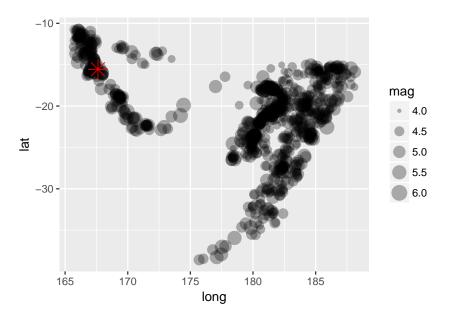
Exercise

- With the mpg dataset, generate a scatter plot with hwy on the x-axis and cty on the y-axis. Let the color represent to class and size represent cyl. Also set alpha=.3.
- From the quakes plot on the previous slide, replace the blue colored points with one big red star (size=5, shape=8) showing which location had the largest magnitude (hint: you'll need to crate another data frame consisting of the single observation you wish to plot)
- 3. Using the economics dataset, plot lines for the values of unemploy and pop with different linetypes, against date as the horizontal axis. (hint: you'll need to select the variables you need, and tidy the data into long format)

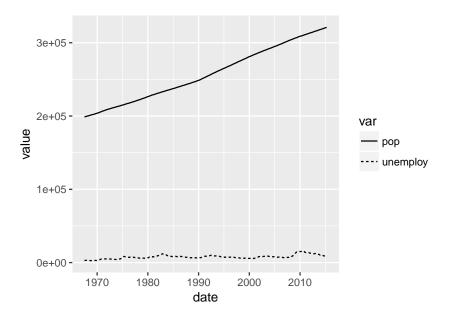
Goal: Exercise 1



Goal: Exercise 2



Goal: Exercise 3

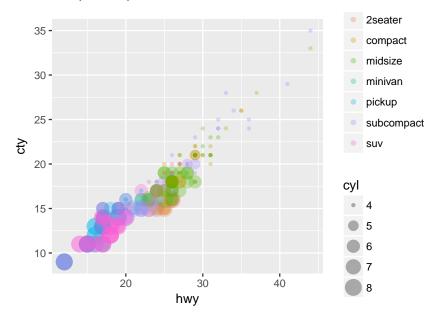


WARNING

- ▶ Solutions to the exercise are presented in the next slide
- ▶ Try the exercise before proceeding!

Solution 1

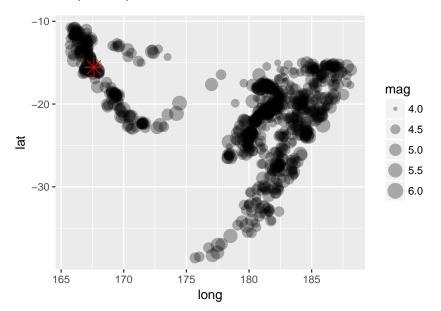
Solution 1 (figure)



Solution 2

```
# Find the largest magnitude observation
quakes max mag <- quakes %>%
  arrange(desc(mag)) %>%
  slice(1)
 <- ggplot(quakes, aes(x=long, y=lat)) +
  geom point(alpha=.3, aes(size=mag)) +
  geom_point(data=quakes_max_mag,
             size=5,
             color='red',
             shape=8)
```

Solution 2 (figure)

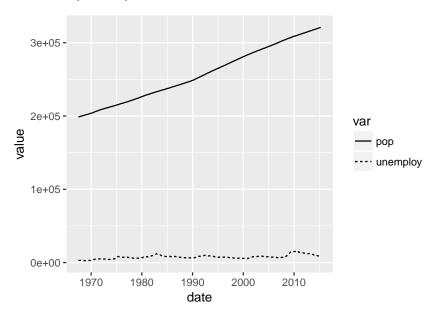


Solution 3

```
# first, get the data into the right format
econ_tidy <- economics %>%
   select(date, unemploy, pop) %>%
   gather(var, value, unemploy:pop)

# generate the plot
p <- ggplot(econ_tidy, aes(x=date, y=value)) +
   geom_line(aes(linetype=var))
p</pre>
```

Solution 3 (figure)



Labels, Scales, and More

Labels

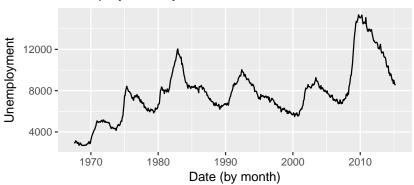
- Three major labels on a plot would be
 - 1. Plot title: use ggtitle('title')
 - x-axis label: use xlab('x label')
 - y-axis label; use ylab('y label')
- Or, to do all of the above in a single line, use

```
labs(title='title', x='x label', y='y label')
```

paste() or sprintf() functions could be useful if you want to construct labels from data

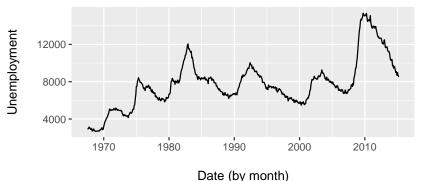
Labels (Example)

Unemployment by time



Labels: Pro tip!

Unemployment by time



Scales

- The mapping between data and aesthetics is controlled via scales
- ► The scales package provides many helpful functions when working with scales

```
# Install, if you haven't already.
# Only need to do this once on a single machine.
install.packages('scales')
# load package into workspace
library('scales')
```

Scales: General Syntax

▶ The general syntax for setting scales is

```
scales_{aes name}_{some option}(
    limits = ...
    values = ...
    # breaks to use in legend/axis
    breaks = ...
    # name of legend/axis
    name = \dots
    # labels to use in legend/axis
    labels = ...
```

- Some scales have specific arguments/convenience functions
- ▶ Be sure to checkout the documentation!

Axis Specific Scales

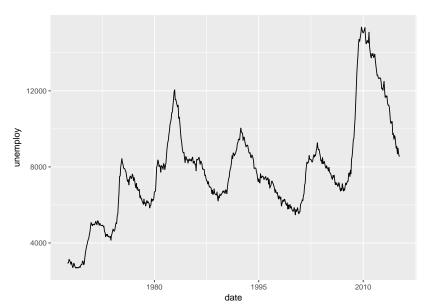
- ▶ There are scales specifically for controling the x/y-axes (examples are given for x, but can be used for y by substituting x for y)
 - scale_x_log10(): Plot x on log10 scale
 - scale_x_reverse(): Reverse the direction of the x axis
 - scale_x_sqrt(): Plot x on square root scale
 - scale_x_date(labels=date_format("%m/%d"),
 breaks=date_breaks("2 weeks")): For axes in date format.
 See ?strptime for label formats, and scale_x_date for more
 details

Axis Scales Example

► To plot unemploy against date, but mark the *x* axis for every 15 years, we would write

```
p <- ggplot(economics, aes(x=date, y=unemploy)) +
  geom_line() +
  scale_x_date(
    labels=date_format('%Y'),
    breaks=date_breaks("15 years")
    )
p</pre>
```

Axis Scales Example (figure)



General Purpose Scales

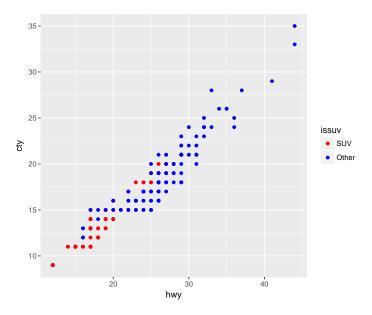
- Scales for specific aesthetics can be controlled with the following functions (where * should be replaced with the desired aesthetic, e.g., color, shape)
 - scale_*_continuous(): map continuous values to visual values
 - scale_*_discrete(): map discrete values to visual values
 - scale_*_identity(): map raw data to visual values (e.g., a
 data value of 1 equals shape #1)
 - scale_*_manual(): map discrete values to manually assigned visual values

Scales: Example

 For example, with the mpg data, we wish to plot hwy against cty, with red points for class=suv and blue points otherwise

```
# First, create a new column in the data indicating
# whether the entry has class suv or not
mpg_suv <- mpg %>%
  mutate(issuv=ifelse(class=='suv', TRUE, FALSE))
p <- ggplot(mpg suv, aes(x=hwy, y=cty)) +</pre>
  geom point(aes(color=issuv)) +
  scale_color_manual(
    limits=c(FALSE, TRUE), values=c('blue', 'red'),
    breaks=c(TRUE, FALSE), labels=c('SUV', 'Other')
```

Scales: Example (figure)



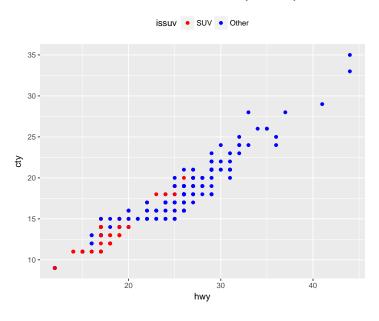
Legends: Positions

- Changing legend position
- The legend.justification determines the 'anchor point' of the legend
- ► Takes a vector of two numbers between 0 and 1, where the first determines left(0)/right(1) and the second determines bottom(0)/top(1)
- ► For example, setting legend.justification to c(0, 0) would anchor the legend at left/bottom, while c(1, 0) would anchor the legend at right/bottom

Legends: Position Top Example

```
p <- ggplot(mpg_suv, aes(x=hwy, y=cty)) +
  geom_point(aes(color=issuv)) +
  scale_color_manual(
    limits=c(FALSE, TRUE), values=c('blue', 'red'),
    breaks=c(TRUE, FALSE), labels=c('SUV', 'Other')
    ) +
  theme(legend.position='top')
p</pre>
```

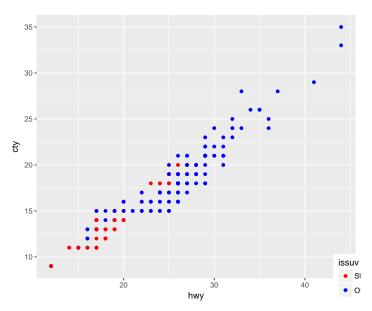
Legends: Position Top Example (figure)



Legends: Position Example

```
p <- ggplot(mpg_suv, aes(x=hwy, y=cty)) +
  geom_point(aes(color=issuv)) +
  scale_color_manual(
    limits=c(FALSE, TRUE), values=c('blue', 'red'),
    breaks=c(TRUE, FALSE), labels=c('SUV', 'Other')
    ) +
  theme(legend.position=c(1, 0))
p</pre>
```

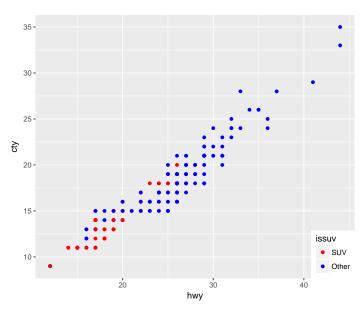
Legends: Position Example (figure)



Legends: Position Example

```
p <- ggplot(mpg_suv, aes(x=hwy, y=cty)) +
  geom_point(aes(color=issuv)) +
  scale_color_manual(
    limits=c(FALSE, TRUE), values=c('blue', 'red'),
    breaks=c(TRUE, FALSE), labels=c('SUV', 'Other')
    ) +
  theme(legend.position=c(1, 0), legend.justification of the color of the col
```

Legends: Position Example (figure)



Legends: Guides

- guides() is used to set the legend type for specific aesthetics
- ▶ A common use-case is, for example, to hide legends by setting the aesthetic to none in guides(), e.g.,

```
# hide color legends
p <- p + guides(color='none')</pre>
```

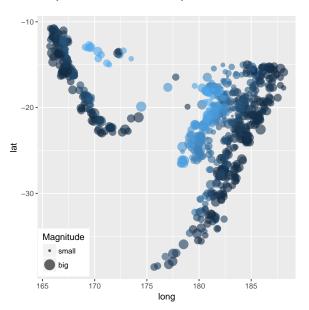
Legends: Scales

As shown in the scales section, we can specify the title/breaks/labels for a legend, using the scale_*_ of the corresponding aesthetic, e.g.,

```
# to modify legend title/labels for a
# continuous variable applied to color aes()
p <- p + scale_color_continuous(
   name='legend title',
   breaks=c(1, 5), # vector of points to label
   labels=c('low', 'high') # corresponding labels
)</pre>
```

Legends (Example)

Legends (Example Figure)



Legends: Remarks

- ► Lots of legend options (and more!) can be controlled via theme()
- ▶ Get familiar with the options in ?theme to become a real pro!

Facets

- Facets let you divide a plot into subplots based on the values of a (discrete) variable
- ▶ The notation is

```
# divide into subplots of 2D grid
# using upto two variables
facet_grid( var.row ~ var.col)

# wrap into a rectangular layout
# using a single variable
facet_wrap(~ var, nrow=NULL, ncol=NULL)
```

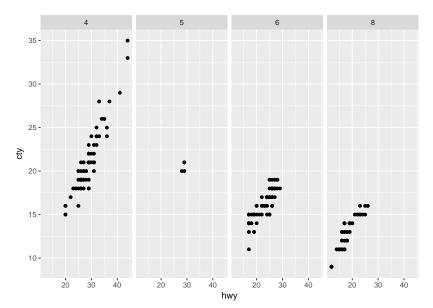
- var.row is the name of the variable to use to divide the rows
- var.col is the name of the variable to use to divide the columns
- Substitute with '.' to skip either row or column division
- ▶ Best demonstrated with examples . . .

Facets: Examples

facet_grid() with one variable (columns)

```
p <- ggplot(mpg, aes(x=hwy, y=cty)) +
  geom_point() +
  facet_grid(. ~ cyl)
p</pre>
```

Facets: Examples (figure)

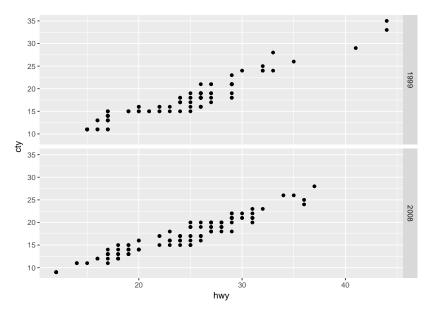


Facets: Examples

facet_grid() with one variable (rows)

```
p <- ggplot(mpg, aes(x=hwy, y=cty)) +
  geom_point() +
  facet_grid(year ~ .)
p</pre>
```

Facets: Examples (figure)

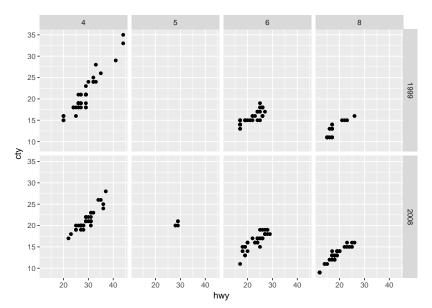


Facets: Examples

facet_grid() with two variables

```
p <- ggplot(mpg, aes(x=hwy, y=cty)) +
  geom_point() +
  facet_grid(year ~ cyl)
p</pre>
```

Facets: Examples (figure)

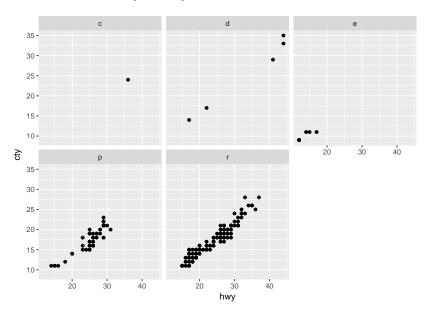


Facets: Examples

facet_wrap()

```
p <- ggplot(mpg, aes(x=hwy, y=cty)) +
  geom_point() +
  facet_wrap( ~ fl)
p</pre>
```

Facets: Examples (figure)



Exercise

- ▶ Now we've covered almost all of the basic concepts of ggplot2!
- ▶ Using any of the tools we've covered, how would you best visualize the mpg dataset to compare hwy against cty?
- ► How would you best visualize any potential insights there might be with regard to unemployment in the economics dataset?
- ▶ There's no "answer" to this one. Explore and share!

Maps

The map layer with ggmap

- With data that involve spacial coordinates (i.e., long/lat), you might want to use the corresponding geographic map as a 'canvas'
- ► This is easily achieved in ggplot with the ggmap package
- Install and load the ggmap package like you would any other R package

```
# Install, if you haven't already.
# Only need to do this once on a single machine.
install.packages('ggmap')
# load package into workspace
library('ggmap')
```

Initializing a map layer

- Use the qmap function to initialize a ggplot object with a map layer
- The main arguments for qmap are
 - ▶ location: an address, vector of longitude/latitude pair (in that order), or vector of left/bottom/right/top bounding box
 - zoom: the zoom level in integer values from 3 (continent) to 21 (building)
 - color: either 'color' or 'bw' (for grayscale)
 - maptype: character string providing map theme, e.g., 'terrain', 'satellite', 'roadmap', 'hybrid', etc.
 - ▶ legend: position for the legend, e.g., 'top', 'right', 'topleft', 'bottomright', 'none', etc.
- qmap loads maps from Google maps by default, but can be changed to other sources
- see ?qmap, ?ggmap, and ?get_map for more details

A Map Layer Example: Location Search



A Map Layer Example



Exercise

▶ Plot the quakes data as a scatter plot on a map, using a bounding box with an appropriate zoom level. Let the size of points represent the mag variable, and color represent depth. Set alpha to 0.6. (hint: use the max/min of long/lat variables to define the bounding box)

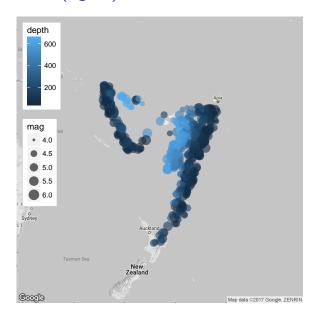
WARNING

- ▶ Solutions to the exercise are presented in the next slide
- ▶ Try the exercise before proceeding!

Solution

```
maxmag <- filter(quakes, mag==max(quakes$mag))</pre>
p <- qmap(location=c(left=min(quakes$long),</pre>
                      bottom=min(quakes$lat),
                      right=max(quakes$long),
                      top=max(quakes$lat)),
          zoom=4, color='bw', legend='topleft') +
  geom point(data=quakes, alpha=0.6,
              aes(x=long, y=lat, size=mag,
                  color=depth))
```

Solution (figure)



Reference

► A great "cheat sheet" for data visualization with ggplot2 is available for free at https://www.rstudio.com/wp-content/uploads/2015/03/ggplot2-cheatsheet.pdf