R crash course - Visualization

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ggplot2 Basics

Single-variable Plots (usually distributions)

Two-variable Plots (points and lines)

Scales, Labels, 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 |

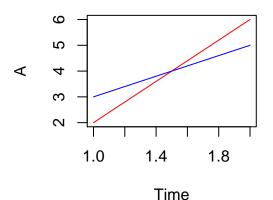
- ▶ We wish to plot the scores of each group, i.e., A and B on the vertical axis, with respect to *Time* on the horizontal axis, with different colors for each group
- First, create the data

```
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

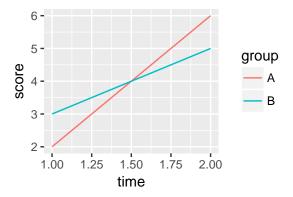
 Create data frame from the vectors, and tidy into long format (Note that the variables of interest are time, score, and group)

```
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()

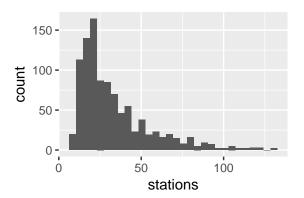
?ggsave

Single-variable Plots (usually distributions)

Histograms

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

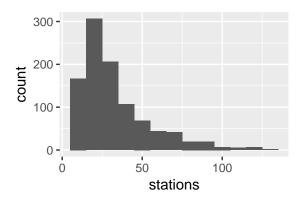
```
p <- ggplot(quakes, aes(x=stations)) +
  geom_histogram()
p</pre>
```



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>
```



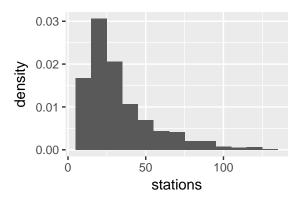
Histograms (cont'd)

- ▶ 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

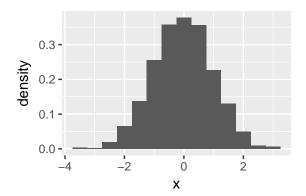
- Plot a density histogram of 1,000 random samples from a standard normal distribution using binwidth 0.5 (hint: use rnorm())
- 2. Plot the (smooth) density of the population (pop) variable from the economics data

WARNING

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

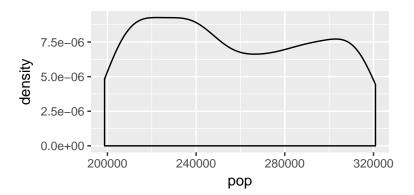
Solution 1

```
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>
```

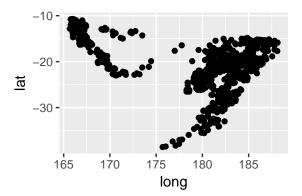




Points with geom_point()

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

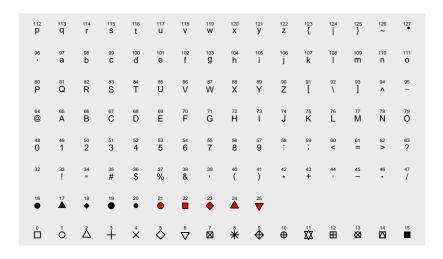
```
p <- ggplot(quakes, aes(x=long, y=lat)) +
  geom_point()
p</pre>
```



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)

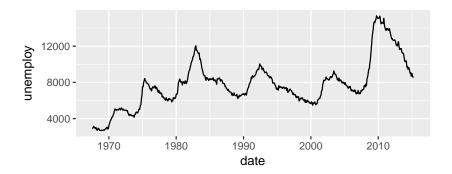
Reference: Shapes



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()

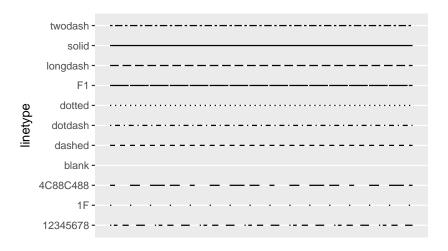
```
p <- ggplot(economics, aes(x=date, y=unemploy)) +
   geom_line()
p</pre>
```



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

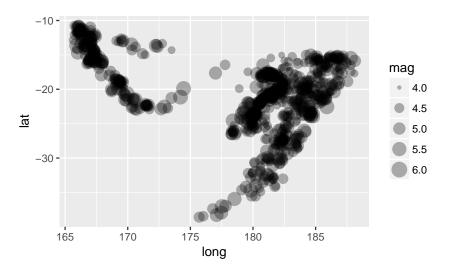
- ► The data and aes() arguments, can be declared globally in the ggplot() function, or locally in each geometry function
- Also, aesthetics can be either
 - mapped to a variable globally, i.e., in ggplot(aes())
 - ▶ mapped to a variable *locally*, i.e., in geom_*(aes()), or
 - defined explicitly for 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)

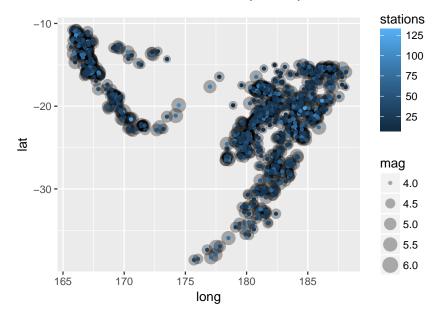


Example: Local aes() mapping

```
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

- 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)
- With the quakes dataset, generate a scatter plot of the mean depth for seismic events reported by each of the 102 stations, with the stations on the horizontal (x) axis. Let the colors of each point represent each station, the size represent the ratio min(mag)/max(mag) within the seismic events reported from each station, and set alpha=.6. (hint: group and summarize the data with dplyr first)
- 3. 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.

WARNING

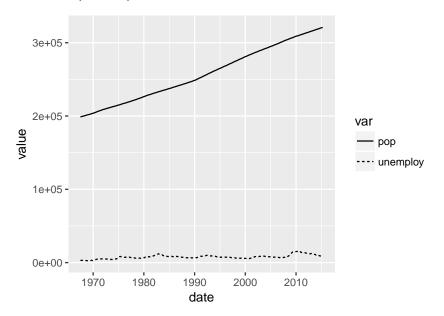
- ▶ Solutions to the exercise are presented in the next slide
- ▶ Try the exercise before proceeding!

Solution 1

```
# 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>
```

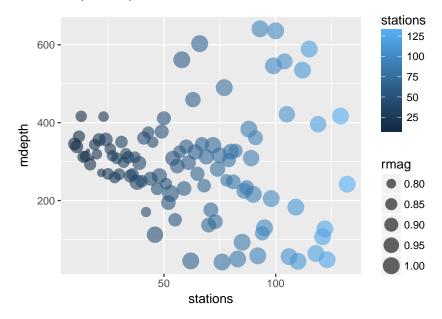
Solution 1 (figure)



Solution 2

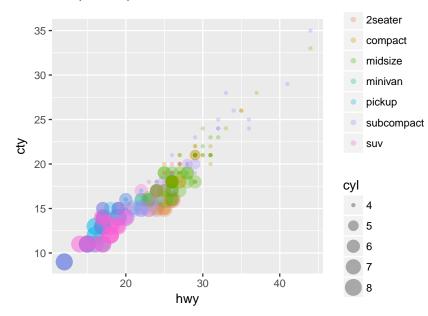
```
summarize the data
quakes_by_stations <- quakes %>%
  group_by(stations) %>%
  summarize(mdepth=mean(depth),
            rmag=min(mag)/max(mag))
# generate plot
 <- ggplot(quakes by stations,
            aes(x=stations, y=mdepth)) +
  geom point(alpha=.6, aes(size=rmag, color=stations))
```

Solution 2 (figure)



Solution 3

Solution 3 (figure)



Scales, Labels, and More

Labels

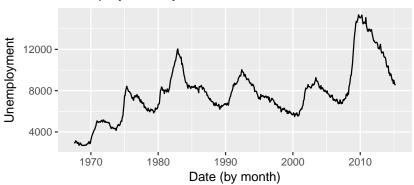
- Three major labels on a plot would be
 - 1. Plot title: use ggtitle('title')
 - x-axis label: use xlab('x label')
 - y-axis label; use ylab('y label')
- Or, to do all of the above in a single line, use

```
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



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!

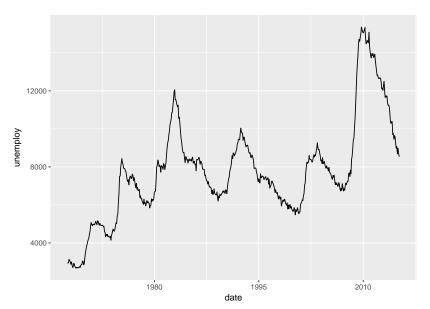
Axis Specific Scales

- ▶ 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

Axis Scales Example (figure)



General Purpose Scales

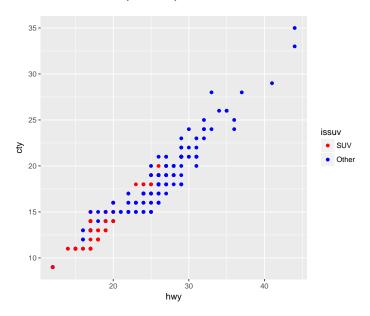
- Scales for specific aesthetics can be controlled with the following functions (where * should be replaced with the desired aesthetic, e.g., color, shape)
 - scale_*_continuous(): map continuous values to visual values
 - scale_*_discrete(): map discrete values to visual values
 - scale_*_identity(): 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: 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>
```

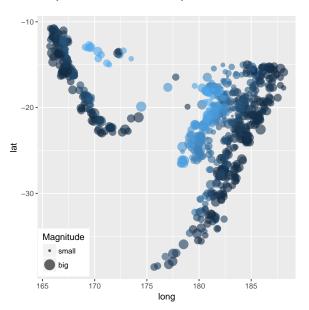
Legends: Scales

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)



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)
```

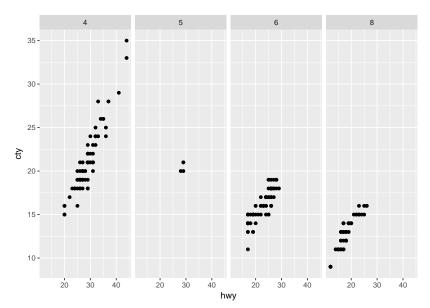
- var.row is the name of the variable to use to divide the rows
- var.col is the name of the variable to use to divide the columns
- Substitute with '.' to skip either row or column division
- ▶ Best demonstrated with examples . . .

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)

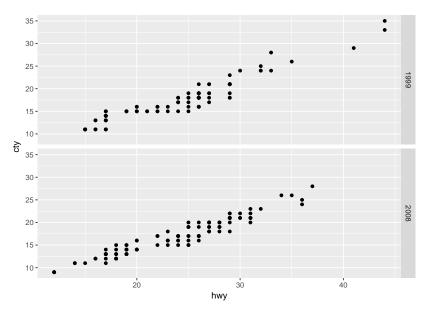


Facets: Examples

facet_grid() with one variable (rows)

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

Facets: Examples (figure)

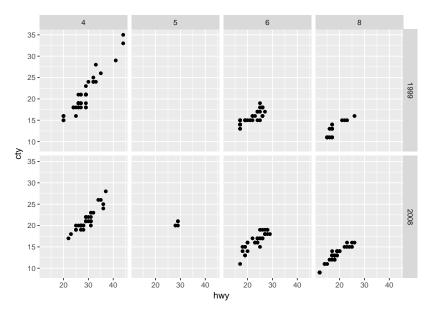


Facets: Examples

facet_grid() with two variables

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

Facets: Examples (figure)

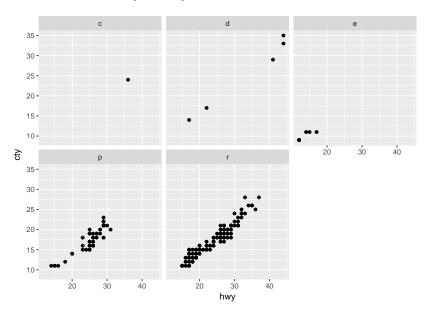


Facets: Examples

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)

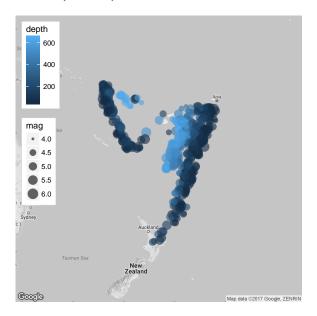
WARNING

- ▶ 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