Unit 8: Handling data with pandas

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1 Handling data with pandas

1.1 Motivation

So far, we have encountered NumPy arrays as the only way to store numerical data (we mostly ignored the built-in contains provided directly in Python).

However, while NumPy arrays are great for storing homogenous data which does not have any particular structure, they are somewhat limited when we want to use them for high-level data analysis.

For example, we usually want to process data sets with

- 1. several variables;
- 2. multiple observations, which need not be identical across variables (some values may be missing);
- 3. non-homogenous data types: for examples, names need to be stored as strings, birthdays as dates and income as a floating-point number.

While NumPy can in principle handle such situations, it puts all the burden on the user. Most users would prefer to not have to deal with such low-level details.

Imagine we want to store names, birth dates and annual income for two people:

Name	Date of birth	Income
Alice	1985-01-01	30,000
Bob	1997-05-12	-

No income was reported for Bob, so it's missing. With NumPy, we could do this as follows:

```
[1]: import numpy as np
from datetime import date

date1 = date(1985, 1, 1)  # birth date for Alice
date2 = date(1997, 5, 12)  # birth date for Bob
```

```
[2]: data.dtype # print array data type
```

[2]: dtype('0')

While we can create such arrays, they are almost useless for data analysis, in particular since everything is stored as a generic object.

• To be fair, NumPy offers an alternative array type called "record" or "structured" array which can handle fields of different data types.

However, the pandas library offers much more beyond that, so there is little reason to use structured arrays.

Pandas was created to offer more versatile data structures that are straightforward to use for storing, manipulating and analysing heterogeneous data:

- 1. Data is clearly organised in *variables* and *observations*, similar to econometrics programs such as Stata.
- 2. Each variable is permitted to have a different data type.
- 3. We can use *labels* to select observations, instead of having to use a linear numerical index as with NumPy.

We could, for example, index a data set using National Insurance Numbers.

4. Pandas offers many convenient data aggregation and reduction routines that can be applied to subsets of data.

For example, we can easily group observations by city and compute average incomes.

5. Pandas also offers many convenient data import / export functions that go beyond what's in NumPy.

Should we be using pandas at all times, then? No!

- For low-level tasks where performance is essential, use NumPy.
- For homogenous data without any particular data structure, use NumPy.
- On the other hand, if data is heterogeneous, needs to be imported from an external data source and cleaned or transformed before performing computations, use pandas.

There are numerous tutorials on pandas on the internet, so we will keep this unit short and illustrate only the main concepts. Useful references to additional material include:

- The official user guide.
- The official pandas cheat sheet which nicely illustrates the most frequently used operations.
- The official API reference with details on every pandas object and function.
- There are numerous tutorials (including videos) available on the internet. See here for a list.

1.2 Creating pandas data structures

Pandas has two main data structures:

- 1. Series represents observations of a single variable.
- 2. DataFrame is a container for several variables. You can think of each individual column of a DataFrame as a Series, and each row represents one observation.

The easiest way to create a Series or DataFrame is to create them from pre-existing data.

To access pandas data structures and routines, we need to import them first. The near-universal convention is to make pandas available using the name pd:

```
[3]: import pandas as pd
```

Examples:

We can create a DataFrame from a NumPy array:

```
import numpy as np
import pandas as pd  # universal convention: import using pd
from numpy.random import default_rng

# Draw normally distributed data
rng = default_rng(123)
data = rng.normal(size=(10,3))

# Define variable (or column) names
varnames = ['A', 'B', 'C']

# Create pandas DataFrame
pd.DataFrame(data, columns=varnames)
```

```
[4]: A B C

0 -0.989121 -0.367787 1.287925
1 0.193974 0.920231 0.577104
2 -0.636464 0.541952 -0.316595
3 -0.322389 0.097167 -1.525930
4 1.192166 -0.671090 1.000269
5 0.136321 1.532033 -0.659969
6 -0.311795 0.337769 -2.207471
7 0.827921 1.541630 1.126807
8 0.754770 -0.145978 1.281902
9 1.074031 0.392621 0.005114
```

This code creates a DataFrame of three variables called A, B and C with 10 observations each.

Alternatively, we can create a DataFrame from non-homogenous data as follows:

```
[5]: # Names (strings)
    names = ['Alice', 'Bob']

# Birth dates (datetime objects)
    bdates = pd.to_datetime(['1985-01-01', '1997-05-12'])

# Incomes (floats)
    incomes = np.array([35000, np.nan]) # code missing income as NaN

# create DataFrame from dictionary
    pd.DataFrame({'Name': names, 'Birthdate': bdates, 'Income': incomes})
```

```
[5]: Name Birthdate Income
0 Alice 1985-01-01 35000.0
1 Bob 1997-05-12 NaN
```

If data types differ across columns, as in the above example, it is often convenient to create the <code>DataFrame</code> by passing a dictionary as an argument. Each key represents a column name and each corresponding value contains the data for that variable.

1.3 Viewing data

With large data sets, you hardly ever want to print the entire <code>DataFrame</code>. Pandas by default limits the amount of data shown. You can use the <code>head()</code> and <code>tail()</code> methods to explicitly display a specific number of rows from the top or the end of a <code>DataFrame</code>.

To illustrate, we use a data set of a few UK universities that contains their name, number of students and budget in million pounds (both from Wikipedia), and their Times Higher Education (THE) ranking.

We read in the data stored in the file universities.csv (from the data/folder) like this:

```
[6]: import pandas as pd

# relative path to CSV file
file = '.../data/universities.csv'

# Load sample data set of UK universities
df = pd.read_csv(file, sep=';')
```

We can now display the first and last three rows:

```
[7]: df.head(3)
                    # show first three rows
                                Country Founded Students Budget
[7]:
                    Institution
                                                                   Rank
                                                                     92
          University of Glasgow Scotland
                                            1451
                                                     30805
                                                            626.5
     1
        University of Edinburgh Scotland
                                            1583
                                                     34275
                                                            1102.0
                                                                     30
       University of St Andrews Scotland
                                            1413
                                                      8984
                                                             251.2
                                                                     201
[8]: df.tail(3)
                    # show last three rows
[8]:
                       Institution
                                           Country Founded Students Budget
            University of Stirling
                                                            9548
                                                                      113.3
     20
                                         Scotland 1967
     21
        Queen's University Belfast Northern Ireland
                                                       1810
                                                                18438
                                                                       369.2
                Swansea University
                                              Wales
                                                       1920
                                                                20620
                                                                         NaN
        Rank
     20
         301
         200
     21
```

To quickly compute some descriptive statistics for the *numerical* variables in the <code>DataFrame</code>, we use <code>describe()</code>:

```
[9]: df.describe()
                           Students
[9]:
               Founded
                                         Budget
                                                      Rank
            23.000000
                          23.000000 22.000000 23.000000
     count
    mean 1745.652174 24106.782609 768.609091 124.739130
           256.992149 9093.000735 608.234948 104.498463
     std
                      8984.000000 113.300000
           1096.000000
                                                 1.000000
    min
           1589.000000 18776.500000 340.850000
     25%
                                                 32.500000
                                    643.750000 107.000000
     50%
           1826.000000 23247.000000
     75%
           1941.500000 30801.500000 1023.500000
                                                195.500000
    max
           2004.000000 41180.000000 2450.000000
                                                401.000000
```

Note that this automatically ignores the columns Institution and Country as they contain strings and computing the mean, etc. of a string variable does not make sense.

To see low-level information about the data type used in each column, we call info():

```
[10]: df.info()

<class 'pandas.core.frame.DataFrame'>
   RangeIndex: 23 entries, 0 to 22
```

Note that pandas automatically discards missing information in computations. For example, the budget for Swansea University is missing, and this observation is therefore dropped when computing descriptive statistics. Consequently, you see in the above table that the column <code>Budget</code> contains only 22 non-null entries.

1.4 Indexing

Pandas supports two types of indexing:

- 1. Indexing by position. This is basically identical to the indexing of other Python and NumPy containers.
- 2. Indexing by label, ie. by the values assigned to the row or column index. These labels need not be integers in increasing order, as is the case for NumPy.

We will see how to assign labels below.

Pandas indexing is performed either by using brackets [], or by using .loc[] for label indexing, or .iloc[] for positional indexing.

Indexing via [] can be somewhat confusing:

- specifying df['name'] returns the column name as a Series object.
- On the other hand, specifying a range such as df[5:10] returns the *rows* associated with the *positions* 5,...,9.

Examples:

```
[11]: import pandas as pd

# Load sample data set of UK universities
df = pd.read_csv('../data/universities.csv', sep=';')
df['Institution'] # select a single column
```

```
University of Glasgow
[11]: 0
                    University of Edinburgh
      1
      2
                   University of St Andrews
      3
                     University of Aberdeen
      4
                  University of Strathclyde
      5
      6
                                        UCL
      7
                    University of Cambridge
      8
                       University of Oxford
      9
                      University of Warwick
      10
                    Imperial College London
                      King's College London
      11
      12
                   University of Manchester
                     University of Bristol
      13
      14
                  University of Birmingham
      15
          Queen Mary University of London
      16
                         University of York
```

```
University of Dundee
      18
      19
                          Cardiff University
      2.0
                      University of Stirling
                 Queen's University Belfast
      2.1
                          Swansea University
      Name: Institution, dtype: object
[12]: df[['Institution', 'Rank']]
                                   # select multiple columns using a list
                               Institution Rank
[12]:
      0
                     University of Glasgow
                                              92
      1
                  University of Edinburgh
      2
                 University of St Andrews
                                             201
      3
                    University of Aberdeen
                                             178
      4
                University of Strathclyde
                                             401
      5
                                       LSE
                                              2.7
      6
                                       UCL
                                              16
                  University of Cambridge
      7
                                               6
      8
                     University of Oxford
                                               1
      9
                     University of Warwick
      10
                  Imperial College London
                                              11
                    King's College London
      12
                 University of Manchester
      13
                     University of Bristol
                                              91
      14
                 University of Birmingham
                                            107
      15 Queen Mary University of London
                                            110
      16
                        University of York
                                             133
      17
                 University of Nottingham
                                             158
      18
                      University of Dundee
                                             201
      19
                        Cardiff University
                                             191
      2.0
                    University of Stirling
                                             301
      21
               Queen's University Belfast
                                             2.00
                        Swansea University
                                             251
```

To return the rows at positions 1, 2 and 3 we use

University of Nottingham

```
[13]: df[1:4]
                     Institution
                                   Country
                                            Founded Students Budget
                                                                      Rank
[13]:
          University of Edinburgh Scotland
                                              1583
                                                       34275 1102.0
                                                                       30
         University of St Andrews Scotland
                                               1413
                                                        8984
                                                               251.2
                                                                       201
           University of Aberdeen Scotland
                                               1495
                                                       14775
                                                               219.5
                                                                       178
```

Pandas follows the Python convention that indices are 0-based, and the endpoint of a slice is not included.

1.4.1 Selection by label

17

Pandas uses *labels* to index and align data. These can be integer values starting at 0 with increments of 1 for each additional element, which is the default, but they need not be.

For example, we can replace the row index and use the Roman lower-case characters a, b, c, \ldots as labels instead of integers:

```
[14]: import pandas as pd
df = pd.read_csv('../data/universities.csv', sep=';')

# Create list of lower-case letters which has same
# length as the number of observations.
index = [chr(97+i) for i in range(len(df))] # len(df) returns number of obs.
index
```

```
[14]: ['a',
       'b',
       'C',
       'd',
        'e',
        'f',
        'g',
       'h',
       'i',
       'j',
       'k',
       '1',
       'm',
       'n',
        '0',
        'p',
        'q',
        'r',
        's',
       't',
        'u',
        'V',
        'w']
                                                         # create new column 'index'
      df['index'] = index
      df.set_index(keys=['index'], inplace=True)
                                                        # set letters as index!
       # print first 3 rows using labels
                               # This is the same as df[:3]
      df['a':'c']
                           Institution Country Founded Students Budget Rank
[15]:
      index
                University of Glasgow Scotland
                                                      1451
                                                               30805
                                                                        626.5
                                                                                 92
      а
                                                    1583
      b
              University of Edinburgh Scotland
                                                               34275 1102.0
                                                                                 30
             University of St Andrews Scotland
                                                      1413
                                                                8984
                                                                       251.2
                                                                                201
```

To add to the confusion, note that when specifying a range in terms of labels, the last element is included! Hence the row with index c in the above example is shown.

To more clearly distinguish between selection by label and by position, pandas provides the .loc[] and .iloc[] methods of indexing. To make your intention obvious, you should therefore adhere to the following rules:

- 1. Use df ['name'] only to select *columns* and nothing else.
- 2. Use .loc[] to select by label.
- 3. Use .iloc[] to select by position.

To illustrate, using .loc[] unambiguously indexes by label:

With .loc[] we can even perform slicing on column names, which is not possible with the simpler df[] syntax:

```
[17]: df.loc['d':'f', 'Institution':'Founded']
```

This includes all the columns between Institution and Founded, where the latter is again included since we are slicing by label.

Trying to pass in positional arguments will return an error if the index does not happen to be of type integer and the given values are actual labels:

```
[18]: df.loc[0:4]
```

```
Traceback (most recent call last)
TypeError
<ipython-input-1-11cc54301474> in <module>
----> 1 df.loc[0:4]
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexing.py inu
 →__getitem__(self, key)
    877
    878
                    maybe_callable = com.apply_if_callable(key, self.obj)
 --> 879
                    return self._getitem_axis(maybe_callable, axis=axis)
    880
            def _is_scalar_access(self, key: Tuple):
    881
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexing.py in_

    getitem_axis(self, key, axis)

   1086
               if isinstance(key, slice):
   1087
                    self._validate_key(key, axis)
-> 1088
                    return self._get_slice_axis(key, axis=axis)
   1089
                elif com.is_bool_indexer(key):
   1090
                    return self._getbool_axis(key, axis=axis)
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexing.py in_
 →_get_slice_axis(self, slice_obj, axis)
   1121
                labels = obj._get_axis(axis)
   1122
                indexer = labels.slice indexer(
 -> 1123
                    slice_obj.start, slice_obj.stop, slice_obj.step, kind="loc"
   1124
   1125
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexes/base.py
 →in slice_indexer(self, start, end, step, kind)
                slice(1, 3, None)
   4964
   4965
-> 4966
                start_slice, end_slice = self.slice_locs(start, end, step=step, __
 →kind=kind)
   4967
   4968
               # return a slice
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexes/base.py
 →in slice_locs(self, start, end, step, kind)
   5165
            start_slice = None
   5166
                if start is not None:
-> 5167
                    start_slice = self.get_slice_bound(start, "left", kind)
   5168
               if start_slice is None:
                    start_slice = 0
   5169
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexes/base.py
→in get_slice_bound(self, label, side, kind)
```

```
5077
                \# For datetime indices label may be a string that has to be \sqcup
⇔converted
   5078
                # to datetime boundary according to its resolution.
  5079
                label = self._maybe_cast_slice_bound(label, side, kind)
   5080
   5081
                # we need to look up the label
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexes/base.py
→in _maybe_cast_slice_bound(self, label, side, kind)
                # this is rejected (generally .loc gets you here)
                elif is_integer(label):
   5030
                    self._invalid_indexer("slice", label)
-> 5031
  5032
   5033
                return label
~/.conda/envs/py3-default/lib/python3.7/site-packages/pandas/core/indexes/base.py
→in _invalid_indexer(self, form, key)
   3266
   3267
                raise TypeError(
-> 3268
                    f"cannot do {form} indexing on {type(self).__name__} with_
⇔these "
   3269
                    f"indexers [{key}] of type {type(key).__name___}"
   3270
                )
TypeError: cannot do slice indexing on Index with these indexers [0] of type int
```

Somewhat surprisingly, we can also pass boolean arrays to .loc[] even though these are clearly not labels:

```
[19]: df.loc[df['Country'] == 'Scotland']
                          Institution Country Founded Students Budget Rank
[19]:
      index
                University of Glasgow Scotland
                                                   1451
                                                            30805
                                                                   626.5
                                                                             92
      а
                                                            34275 1102.0
              University of Edinburgh Scotland
                                                   1583
                                                                            30
      h
                                                                   251.2
             University of St Andrews Scotland
                                                   1413
                                                             8984
                                                                            2.01
      С
               University of Aberdeen Scotland
                                                                    219.5
                                                                            178
      d
                                                   1495
                                                            14775
             University of Strathclyde Scotland
                                                   1964
                                                            22640
                                                                    304.4
                                                                            401
      е
                 University of Dundee Scotland
                                                   1967
                                                            15915
                                                                    256.4
                                                                            201
      S
               University of Stirling Scotland
                                                   1967
                                                             9548
                                                                    113.3
                                                                            301
```

Indexing via .loc[] supports a few more types of arguments, see the official documentation for details.

1.4.2 Selection by position

Conversely, if we want to select items exclusively by their position and ignore their labels, we use .iloc[]:

Again, .iloc[] supports a multitude of other arguments, including boolean arrays. See the official documentation for details.

1.5 Aggregation and reduction

1.5.1 Working with entire DataFrames

The simplest way to perform data reduction is to invoke the desired routine on the entire DataFrame:

Methods such as mean () are by default applied column-wise to each numerical column.

One big advantage over NumPy is that missing values (represented by np.nan) are automatically ignored:

1.5.2 Splitting and grouping

Applying aggregation functions to the entire <code>DataFrame</code> is similar to what we can do with NumPy. The added flexibility of pandas becomes obvious once we want to apply these functions to subsets of data, ie. groups, which we can define based on values or index labels.

For example, we can easily group our universities by country:

```
[24]: import pandas as pd

df = pd.read_csv('../data/universities.csv', sep=';')

groups = df.groupby(['Country'])
```

Here groups is a special pandas objects which can subsequently be used to process group-specific data. To compute the group-wise averages, we can simply run

```
[25]: groups.mean()
                          Founded
                                      Students
                                                    Budget
                                                                 Rank
[25]:
      Country
     England
                      1745.923077 27119.846154 1001.700000
                                                           63.307692
      Northern Ireland 1810.000000 18438.000000 369.200000 200.000000
      Scotland
                      1691.428571 19563.142857
                                                410.471429 200.571429
                      1901.500000 23259.000000
                                               644.800000 221.000000
      Wales
```

Groups support column indexing: if we want to only compute the total number of students for each country in our sample, we can do this as follows:

There are numerous routines to aggregate grouped data, for example:

- mean(), sum(): averages and sums over numerical items within groups.
- std(), var(): within-group std. dev. and variances
- size(): group sizes
- first(), last(): first and last elements in each group
- min(), max(): minimum and maximum elements within a group

Examples:

```
[27]: groups.size()
                        # return number of elements in each group
[27]: Country
                        13
      England
     Northern Ireland
                        1
      Scotland
                         7
     Wales
                         2.
     dtype: int64
[28]: groups.first()
                        # return first element in each group
                                    Institution Founded Students Budget Rank
[28]:
     Country
      England
                                           LSE
                                                 1895
                                                          11850
                                                                  415.1
                                                                           27
                                                           18438 369.2
     Northern Ireland Queen's University Belfast 1810
                                                                          200
                                                                 626.5
                                                           30805
     Scotland University of Glasgow 1451
                                                                          92
                             Cardiff University
                                                           25898
                                                                   644.8
     Wales
                                                   1883
                                                                          191
```

We can create custom aggregation routines by calling agg() or aggregate() on the grouped object. To illustrate, we count the number of universities in each country that have more than 20,000 students:

Note that we called agg() only on the column Students, otherwise the function would be applied to every column separately, which is not what we want.

The most flexible aggregation method is apply() which calls a given function, passing the entire group-specific subset of data (including all columns) as an argument, and glues together the results.

For example, if we want to compute the average budget per student (in pounds), we can do this as follows:

```
Northern Ireland 20023.863760
Scotland 20981.875539
Wales 13861.301002
dtype: float64
```

We couldn't have done this with agg(), since agg() never gets to see the entire chunk of data but only one column at a time.

This section provided only a first look at pandas's "split-apply-combine" functionality implemented via groupby. See the official documentation for more details.

1.6 Visualisation

We covered plotting with Matplotlib in earlier units. Pandas itself implements some convenience wrappers around Matplotlib plotting routines which allow us to quickly inspect data stored in <code>DataFrames</code>. Alternatively, we can extract the numerical data and pass it to Matplotlib's routines manually.

For example, to plot student numbers as a bar chart, we can directly use pandas:

```
[31]: import pandas as pd

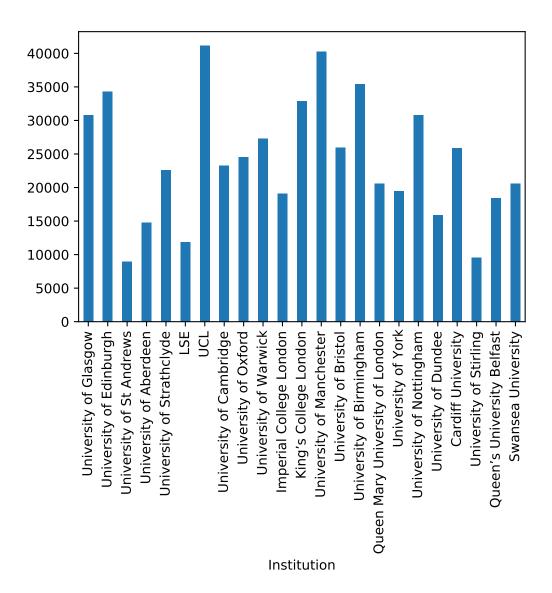
df = pd.read_csv('../data/universities.csv', sep=';')

# set institution as label so they automatically show up in plot

df2 = df.set_index(keys=['Institution'])

df2['Students'].plot(kind='bar')
```

[31]: <AxesSubplot:xlabel='Institution'>



Alternatively, we can construct the graph using Matplotlib ourselves:

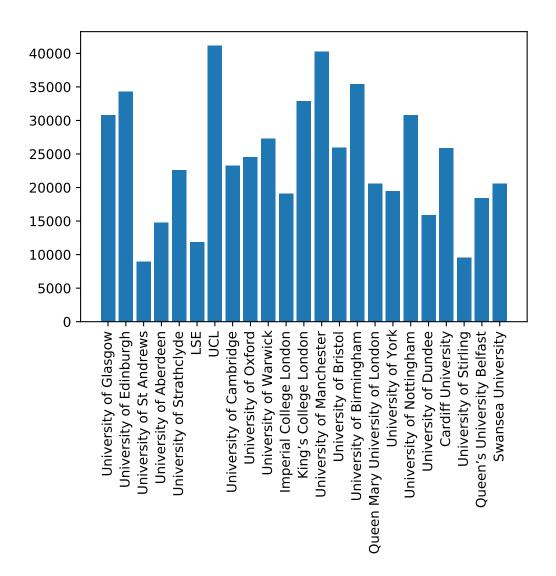
```
[32]: import matplotlib.pyplot as plt

labels = df['Institution'].to_list()  # labels as list

values = df['Students'].to_numpy()  # data as NumPy array

plt.bar(labels, values)

plt.tick_params(axis='x', labelrotation=90)
```



Sometimes Matplotlib's routines directly work with pandas's data structures, sometimes they don't. In cases where they don't, we can convert a DataFrame or Series object to a NumPy array using the to_numpy() method, and convert a Series to a Python list using to_list(), as illustrated in the example above.

To plot timeseries-like data, we can use the plot () method, which optionally accepts arguments to specify which columns should be used for the x-axis and which for the y-axis:

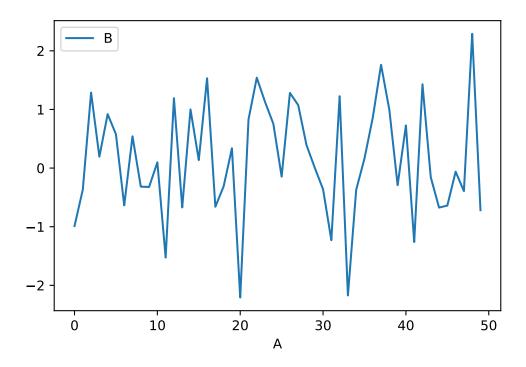
```
import numpy as np
import pandas as pd

# Instantiate RNG
rng = np.random.default_rng(123)

# Create pandas DataFrame
nobs = 50
df = pd.DataFrame({'A': np.arange(nobs), 'B': rng.normal(size=nobs)})

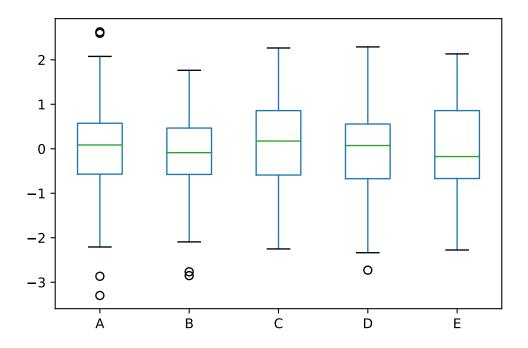
df.plot(x='A', y='B') # plot A on x-axis, B on y-axis
```

[33]: <AxesSubplot:xlabel='A'>



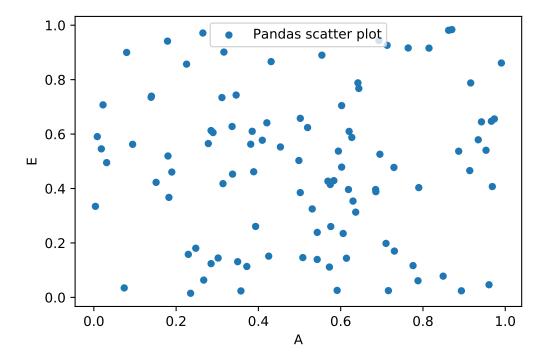
To quickly generate some descriptive statistics, we can use the built-in box plot:

[34]: <AxesSubplot:>



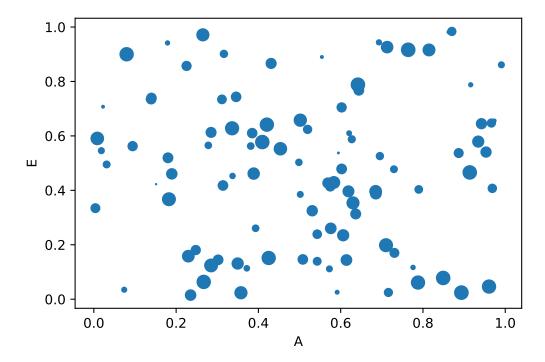
Similarly, we can generate scatter plots, plotting one column against another:

[35]: <AxesSubplot:xlabel='A', ylabel='E'>



```
[36]: # We can even use a column to specify the dot size! df.plot.scatter(x='A', y='E', s=df['B']*100.0)
```

[36]: <AxesSubplot:xlabel='A', ylabel='E'>



In general, the wrappers implemented in pandas are useful to get an idea how the data looks like. For reusable code or more complex graphs, we'll usually want to directly use Matplotlib and pass the data converted to NumPy arrays.

2 Exercises

TBA

3 Solutions

TBA