

### R Tutorial at the WZB

7 - Reshaping data and plotting with ggplot2

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### Today's schedule

- 1. Review of last week's tasks
- 2. Reshaping data with gather() and spread()
- 3. Plotting with ggplot2



# Review of last week's tasks

#### Solution for tasks #6

now online on

https://wzbsocialsciencecenter.github.io/wzb\_r\_tutorial/



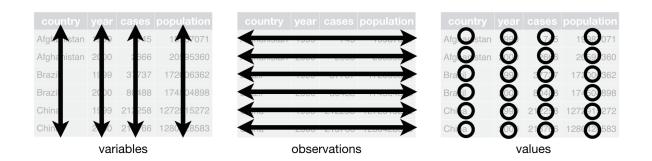
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Reshaping data with gather() and spread()

#### Tidy data

Hadley Wickham introduced the concept of **tidy data** as a way how data should be organized so it is comfortable to work with (<u>H. Wickham 2014: Tidy Data</u>). He defined three rules that make a data set tidy:

- 1. Each variable must have its own column.
- 2. Each observation must have its own row.
- 3. Each value must have its own cell.



source: Grolemund, Wickham 2017: R for Data Science



### Why tidy data?

- a tidy data set allows for easier variable selection, grouping, summarization and visualization
- tools and packages in the tidyverse like dplyr or ggplot2 require data to be organized in that way
- the problem: most data you'll get won't be "tidy" from the beginning on → you'll need to reshape it



#### OBrienKaiser from package carData

- data from imaginary study
- three treatments: A, B, control
- · three measurement types: pretest, posttest, follow-up session
- each measured at five occasions (suffixes .1 to .5)

```
treatment gender pre.1 pre.2 pre.3 pre.4 pre.5 post.1 post.2 post.3 post.4

A M 7 8 7 9 9 9 9 10 8

B F 4 5 7 5 4 7 7 8 6

control M 1 2 4 2 1 3 2 5 3
```

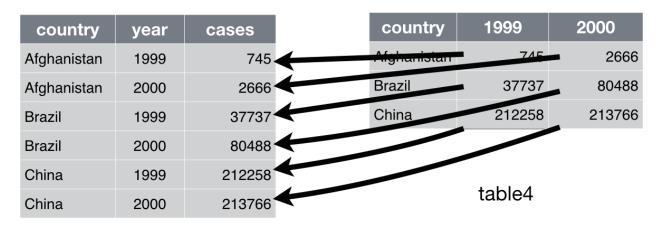
Is this data tidy?

No! You have several measurements (observations) per row. This is also called a wide table format.

→ hard to work with (e.g. compute mean of all three measurement types separately)



We can use gather() from package tidyr to put the measurements in separate rows.



source: Grolemund, Wickham 2017: R for Data Science



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gather() takes the following arguments (among others):

- 1. The data to work with (omit this if you use the pipe operator %>%).
- 2. The "untidy" columns to gather.
- 3. **key**: The name of the new column containing the measurement types.
- 4. value: The name of the new column containing the measurement values.

```
(tidy_obk <- gather(OBrienKaiser, pre.1:fup.5,</pre>
                      key = 'meas_type_occasion', value = 'value'))
       treatment gender meas_type_occasion value
##
## 1
         control
                        М
                                        pre.1
                                                   1
## 2
         control
                        Μ
                                        pre.1
                                                   4
## 3
         control
                                                   5
                        Μ
                                        pre.1
         control
                        F
                                                   5
                                        pre.1
## 5
                        F
                                                   3
         control
                                        pre.1
                                                   7
## 6
                Α
                        Μ
                                        pre.1
## 7
                                        pre.1
                                                   5
                        F
                                                   2
## 8
                Α
                                        pre.1
                                                   3
## 9
                Α
                                        pre.1
## 10
                                        pre.1
                                                   4
                В
                                                   3
## 11
                        Μ
                                        pre.1
## 12
                В
                        Μ
                                                   6
                                        pre.1
                В
                        F
                                                   5
## 13
                                        pre.1
                        F
                                                   2
## 14
                В
                                        pre.1
## 15
                                        pre.1
    [ reached getOption("max.print") -- omitted 225 rows ]
```



Our data is already better to work with, but meas\_type\_occasion still contains two values like "pre.1" (pretest 1) or "fup.4" (follow-up test 4). This violates rule #3: "Each value must have its own cell.").

We can use **separate()** (package tidyr) to split columns that contain several values. It takes the following arguments (among others):

- 1. The data to work with (omit this if you use the pipe operator %>%).
- 2. The column to split.
- 3. into: The names of the new columns.
- 4. **sep**: A rule for how to split the values. The default is to split on anything that is not a number or character (e.g. slash, period, hyphen, ...).



Some additional variable conversion and we're done:

```
tidy_obk <- mutate(tidy_obk,</pre>
                     meas_type = factor(meas_type, levels = c('pre',
                                                                          'post', '
                     meas_occasion = as.integer(meas_occasion))
##
       treatment gender meas_type meas_occasion value
## 1
          control
                                 pre
                                                   1
## 2
          control
                                 pre
                                                          4
## 3
          control
                        Μ
                                 pre
                                                   1
                                                          5
## 4
          control
                                 pre
                                                   1
                                                          5
          control
                                 pre
                                 pre
                                                   1
                                                          7
## 7
                Α
                        Μ
                                                   1
                                                          5
                                 pre
## 8
                                 pre
                                                   1
## 9
                Α
                                 pre
                                                          3
## 10
                В
                        Μ
                                                   1
                                                          4
                                 pre
## 11
                В
                        Μ
                                                   1
                                                          3
                                 pre
## 12
                                                   1
                                                          6
                                 pre
    [ reached getOption("max.print") -- omitted 228 rows ]
```

→ This is tidy data. It's also called the long table format.



With this data we can actually work!

```
tidy_obk %>%
  group_by(treatment, meas_type) %>%
  summarise(mean_measurement = mean(value))
## # A tibble: 9 x 3
## # Groups: treatment [?]
     treatment meas_type mean_measurement
##
    <fct>
             <fct>
                                    <dbl>
## 1 control pre
                                     4.2
## 2 control post
                                     4
## 3 control
             fup
                                     4.4
## 4 A
               pre
                                     5
## 5 A
               post
                                     6.5
                                     7.25
## 6 A
               fup
## 7 B
               pre
                                     4.14
## 8 B
               post
                                     6.57
                                     7.29
## 9 B
               fup
```

It's better spending some time on data cleanup than struggling with messy data sets!



#### **Combining rows**

spread() is the opposite of gather(): It combines observations
from multiple rows into a single row with more columns. Hence it
converts data from the long table format to the wide table format.

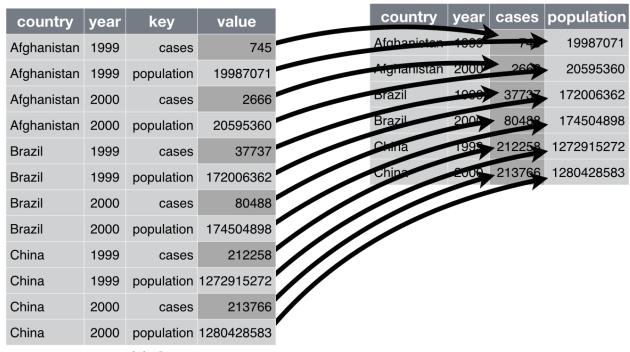


table2

source: Grolemund, Wickham 2017: R for Data Science



#### **Combining rows**

economics\_long from package ggplot2 contains data in long table
format:

```
date
           variable
                        value
1967-07-01 pce
                        507.
1967-08-01 pce
                        510.
1967-09-01 pce
                        516.
1967-07-01 pop
                     198712
1967-08-01 pop
                    198911
1967-09-01 pop
                    199113
1967-07-01 psavert
                         12.5
1967-08-01 psavert
                         12.5
1967-09-01 psavert
                         11.7
```

For each date, there are five variable types (pce, pop, psavert, unemploy, uempmed) and their respective values.



#### **Combining rows**

spread() takes the following arguments:

- 1. The data to work with (omit this if you use the pipe operator %>%).
- 2. key: The column containing the variable names.
- 3. value: The column containing the respective variable values.

```
spread(economics_long, variable, value)
```

```
## # A tibble: 574 x 6
                           pop psavert uempmed unemploy
##
      date
                   рсе
                                         <dbl>
                                                  <dbl>
      <date>
                 <dbl>
                        <dbl>
                                 <dbl>
##
   1 1967-07-01
                  507. 198712
                                  12.5
                                           4.5
                                                    2944
##
                                  12.5
                                           4.7
##
    2 1967-08-01
                  510. 198911
                                                    2945
                  516. 199113
                                  11.7
##
    3 1967-09-01
                                           4.6
                                                    2958
   4 1967-10-01
                  513. 199311
                                  12.5
                                           4.9
##
                                                    3143
                  518. 199498
                                  12.5
                                           4.7
   5 1967-11-01
                                                    3066
                                  12.1
##
   6 1967-12-01
                  526. 199657
                                           4.8
                                                    3018
##
   7 1968-01-01
                  532. 199808
                                  11.7
                                           5.1
                                                    2878
                                  12.2
                                           4.5
   8 1968-02-01
                  534. 199920
                                                    3001
    9 1968-03-01
                  545. 200056
                                  11.6
                                           4.1
                                                    2877
## 10 1968-04-01
                  545. 200208
                                  12.2
                                           4.6
                                                    2709
## # ... with 564 more rows
```



### Plotting with ggplot2

#### Data visualization

Grouping, aggregating and summarizing results are important for data analysis. They let you reduce complex data sets to simpler summarizations, compare groups and help to see patterns in your data.

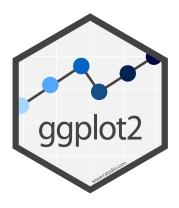
Visualization of your data can have the same benefits and has the power to communicate a message much faster than a table of numbers. However, it requires a sense for which type of graph or visual representation is appropriate for your data.

A useful website for inspiration, code examples and caveats is https://www.data-to-viz.com.



#### What is ggplot2?

- R offers several plotting systems (e.g. base R, lattice or ggplot2)
- · we'll use ggplot2 because:
  - it's versatile and elegant
  - it employs a well founded theory for declaratively creating graphics called "Grammar of Graphics" (Wilkinson 2005)



source:

tidyverse.org

- it's part of the tidyverse → plays together well with the tools we already learned

There are three basic steps for constructing plots with ggplot2:

- 1. Supply a data set you want to plot to ggplot().
- 2. Define an aesthetic mapping with aes().

  This describes how variables of your data are mapped to visual properties, e.g. variable "age" is plotted on the x-axis and "income" on the y-axis.
- 3. Add layers of **geoms** (geometrical objects) that describe which graphical primitives to use (e.g. points in a scatter plot or bars in a bar plot).

Additionally, you can further change the appearance of your plot by:

- altering the scales (e.g. use a logarithmic scale, modify display of factors, etc.)
- defining facets → create small multiples, each showing a different subset of the data
- changing the coordinate system (e.g. to display maps or radial plots)
- changing the overall appearance of the plot by adjusting its **theme** (e.g. change background color, rotate axis labels, etc.)

You combine all these steps with a +.

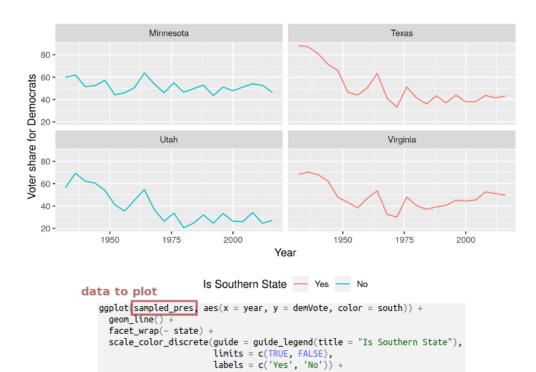


We'll make a plot for historical election results from four states (data set

presidentialElections from package pscl):

```
## # A tibble: 88 x 4
##
     state
                demVote
                       year south
                  <dbl> <int> <lql>
  <chr>
##
   1 Louisiana
                   92.8 1932 TRUE
##
  2 Maine
                   43.2 1932 FALSE
##
   3 South Dakota 63.6 1932 FALSE
##
## 4 Tennessee
               66.5 1932 TRUE
  5 Louisiana
##
                   88.8 1936 TRUE
## 6 Maine
                   41.5 1936 FALSE
## 7 South Dakota 54.0 1936 FALSE
## 8 Tennessee
               68.8 1936 TRUE
## 9 Louisiana 85.9 1940 TRUE
## 10 Maine
                   48.8
                         1940 FALSE
## # ... with 78 more rows
```





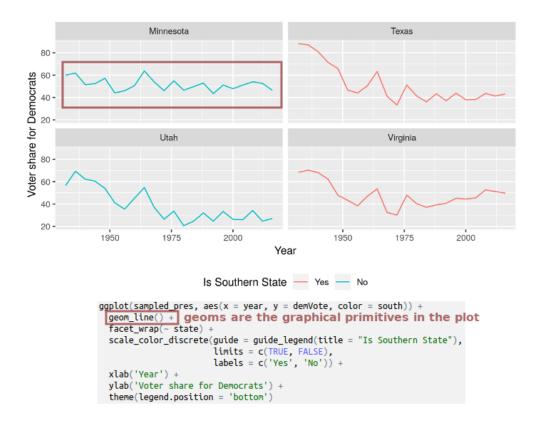


xlab('Year') +

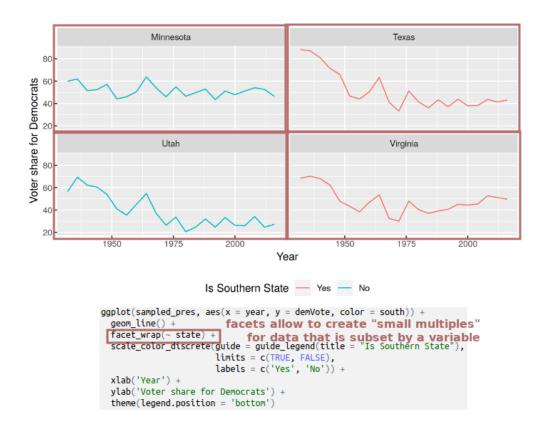
ylab('Voter share for Democrats') +
theme(legend.position = 'bottom')



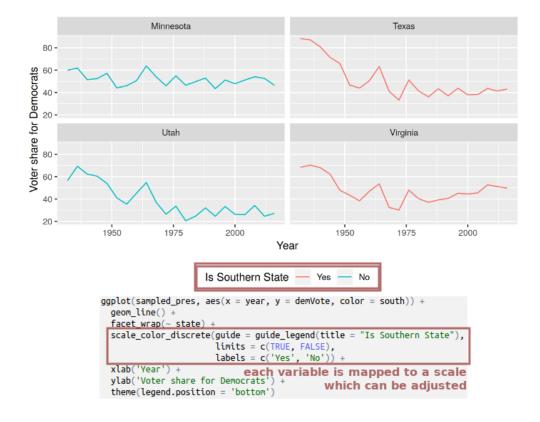






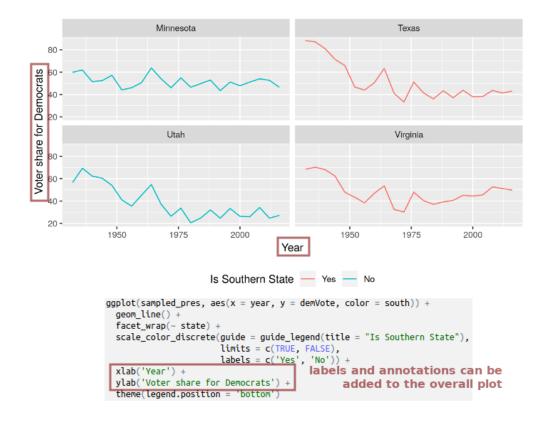




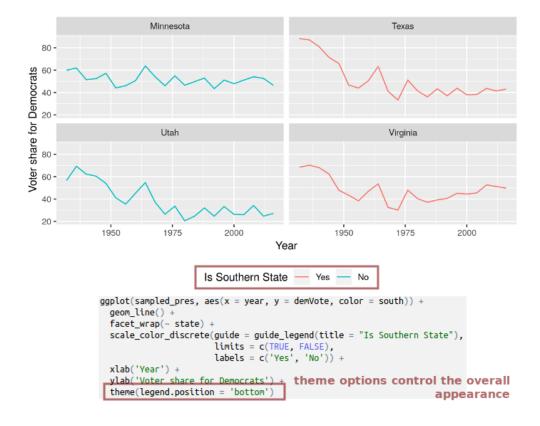




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#### Example data

Example data: politicalInformation from pscl package

Interviewers administering the 2000 American National Election Studies assigned an ordinal rating to each respondent's "general level of information" about politics and public affairs.

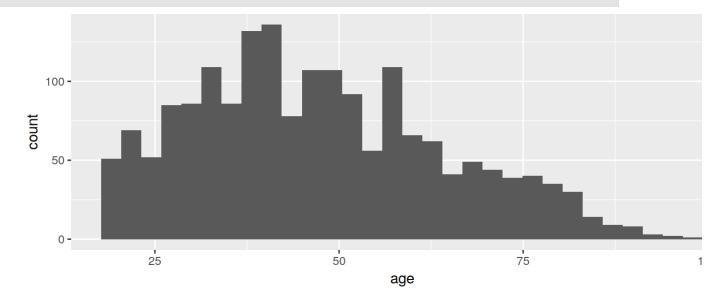
```
##
                  y collegeDegree female age homeOwn govt length
                                                                     id
## 1
        Fairly High
                                       No
                                           49
                                                   Yes
                                                             58.40
                               Yes
                                                         No
                                                                      1
## 2
            Average
                                      Yes
                                            35
                                                             46.15
                                No
                                                   Yes
                                                         No
## 3
          Very High
                                No
                                      Yes
                                           57
                                                   Yes
                                                         No
                                                             89.52
                                                                      3
## 4
            Average
                                            63
                                                             92.63
                                                                      4
                                No
                                       No
                                                   Yes
                                                         No
        Fairly High
## 5
                                                             58.85
                               Yes
                                      Yes
                                           40
                                                   Yes
                                                         No
## 6
            Average
                                No
                                           77
                                                   Yes
                                                             53.82
                                                                      4
                                       No
                                                         No
## 7
            Average
                                           43
                                                   Yes
                                                             58.47
                                                                      5
                                No
                                       No
                                                         No
    [ reached getOption("max.print") -- omitted 1800 rows ]
```



At first, you should make sure that you either loaded the tidyverse package or ggplot2 package. We define:

- 1. The data set politicalInformation.
- 2. The aeshetic mapping for a single variable age.
- 3. The graphical representation as histogram with geom\_histogram().

ggplot(politicalInformation, aes(age)) + geom\_histogram()





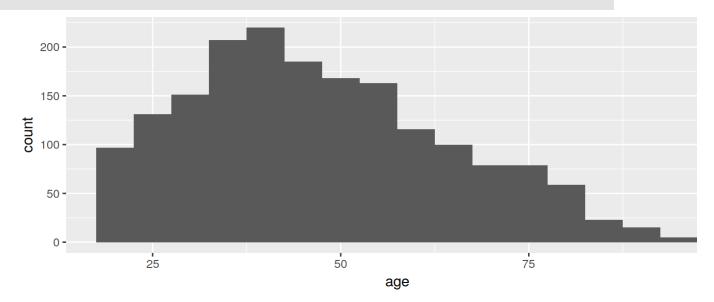
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I hid two messsages produced by ggplot:

`stat\_bin()` using `bins = 30`. Pick better value with `binwidth`. Removed 9 rows containing non-finite values (stat\_bin).

- the first tells us that a default value for the number of bins was used → we set binwidth = 5 below to make a histogram of age with five-year steps
- the second complains about 9 NA values in the age variable → we can ignore this

ggplot(politicalInformation, aes(age)) + geom\_histogram(binwidth = 5)



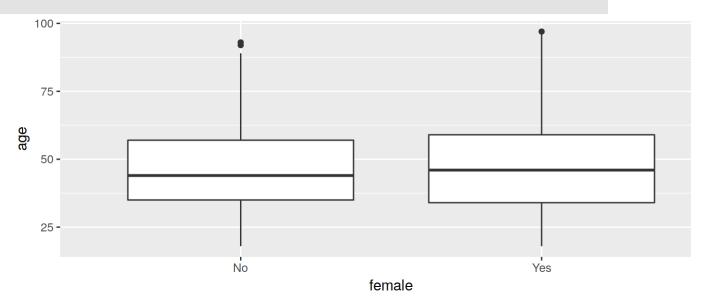


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What if we wanted to know if the distribution of **age** in our sample is different for men and women?

We can produce boxplots for both subsets, putting **female** on the x-axis (see how the aesthetics mapping was changed!):

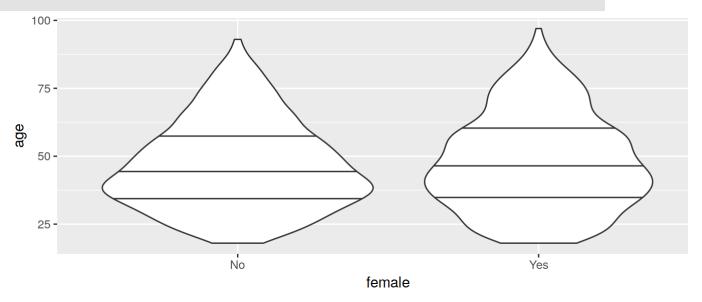
 $ggplot(politicalInformation, aes(x = female, y = age)) + geom_boxplot()$ 





A violin plot offers better insight about the actual shape of the distribution:

```
ggplot(politicalInformation, aes(x = female, y = age)) + geom_violin(draw_quantiles = c(0.25, 0.5, 0.75)) # horizontal lines for q
```

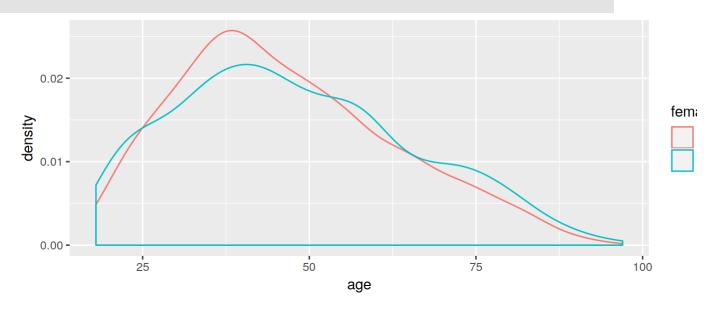




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A density plot also reveals that there are more younger men in the sample:

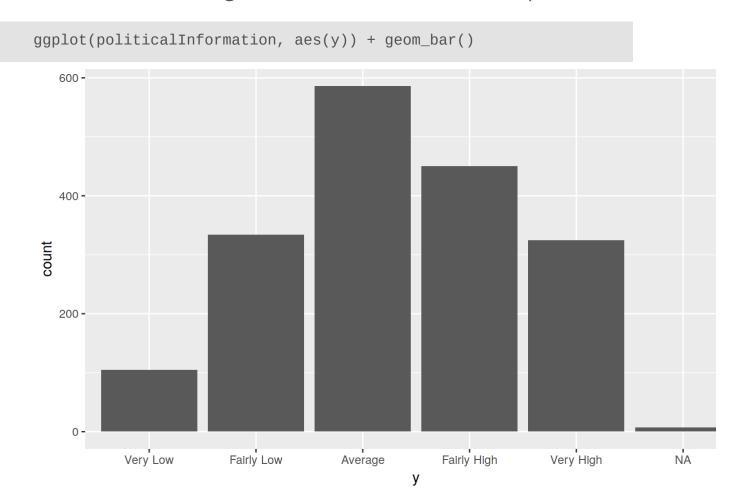
ggplot(politicalInformation, aes(age, color = female)) + geom\_density()





### Counts of a single categorical variable

Histograms can be used to bin continuous variables. To show the distribution of a categorical variable we can use a simple bar chart:





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### Counts of a single categorical variable

A stacked and grouped bar charts allows to compare groups. Here, we compare groups based on the **collegeDegree** variable by mapping the "fill (color)" aesthetic to it.

By default, the bars get stacked:



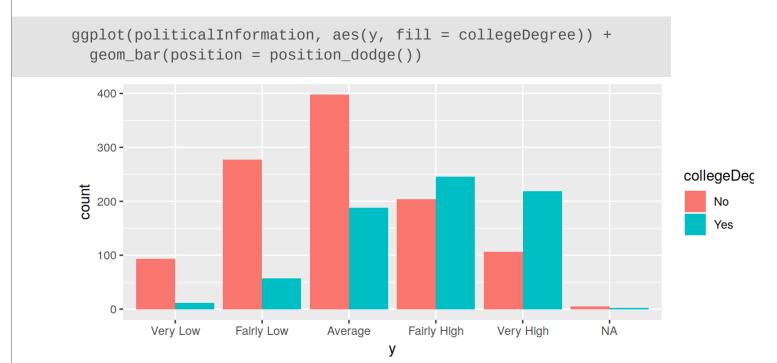


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# Counts of a single categorical variable

A stacked and grouped bar charts allows to compare groups. Here, we compare groups based on the **collegeDegree** variable by mapping the "fill (color)" aesthetic to it.

Setting the bars' position to position\_dodge() creates a grouped bar chart:





A scatterplot displays the relationship between two numeric variables. We'll use the airquality and have a look at the relationship between ozone and temperature.

#### head(airquality)

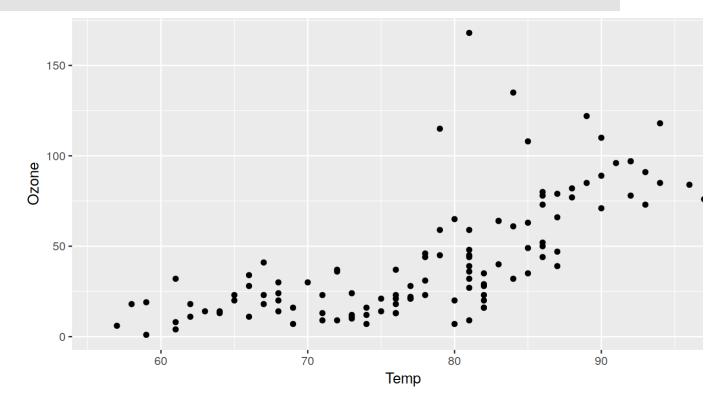
```
##
     Ozone Solar.R Wind Temp Month Day
## 1
        41
               190 7.4
                          67
                                 5
                                     1
## 2
        36
                          72
                                 5
                                     2
               118 8.0
               149 12.6
                          74
                                 5
                                     3
## 3
       12
        18
               313 11.5
                          62
                                 5
                                     4
                                     5
## 5
       NA
               NA 14.3
                          56
## 6
                NA 14.9
                                 5
                                     6
        28
                          66
```



A scatterplot displays the relationship between **two numeric variables**. We'll use the **airquality** and have a look at the relationship between ozone and temperature.

We map Ozone to the y-axis and Temp to the x-axis and use geom\_point():

 $ggplot(airquality, aes(x = Temp, y = Ozone)) + geom_point()$ 

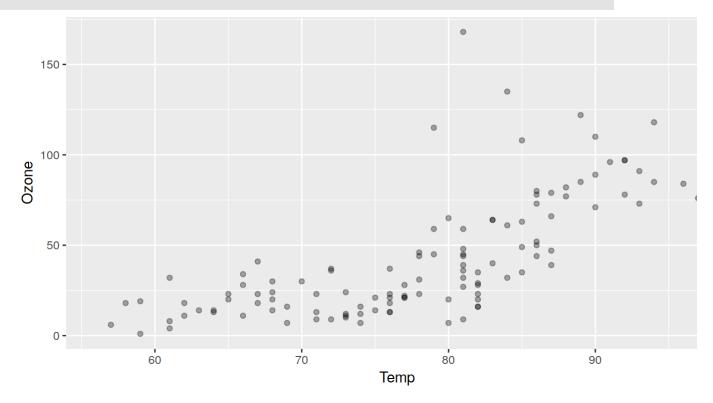




Overplotting can easily occur, especially with large data sets.

- · happens when multiple data points are drawn on the same spot
- fix it with setting a semi-transparent fill color or apply jittering

```
ggplot(airquality, aes(x = Temp, y = Ozone)) + geom\_point(alpha = 0.33) # alpha of 0 is invisible, 1 is opaque
```

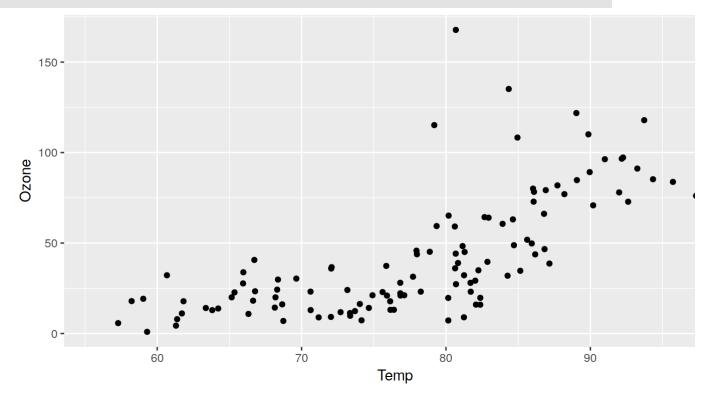




Overplotting can easily occur, especially with large data sets.

- · happens when multiple data points are drawn on the same spot
- · fix it with setting a semi-transparent fill color or apply jittering

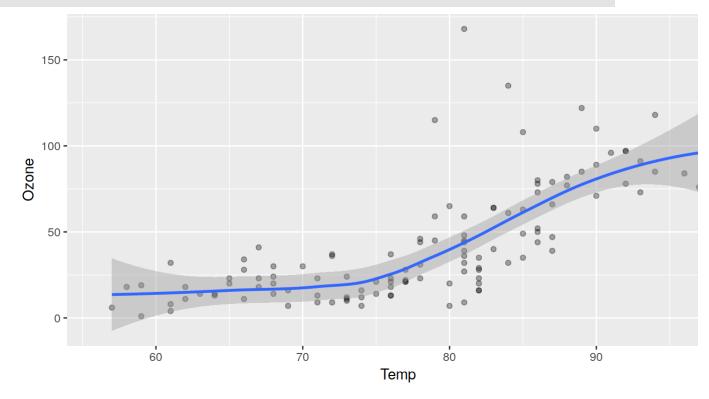
```
ggplot(airquality, aes(x = Temp, y = Ozone)) +
  geom_point(position = position_jitter())
```





geom\_smooth() aids the eye in seeing patterns by adding a (local polynomial) regression line and its confidence interval:

```
ggplot(airquality, aes(x = Temp, y = Ozone)) +
  geom_point(alpha = 0.33) +
  geom_smooth()
```





A line graph can be used whenever you have an **ordered numeric variable on the x-axis**, such as years.

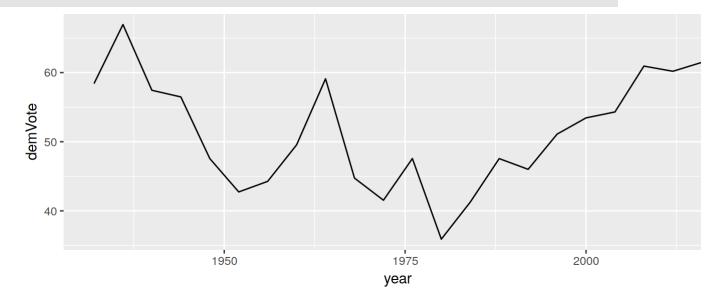
We'll use a subset of the **presidentialElections** data set from the package pscl:

```
(cal_pres <- presidentialElections %>% filter(state == 'California'))
## # A tibble: 22 x 4
##
                demVote
                       year south
     state
                 <dbl> <int> <lgl>
##
     <chr>
                   58.4 1932 FALSE
   1 California
##
##
   2 California
                  67.0 1936 FALSE
   3 California
                  57.4 1940 FALSE
##
   4 California
                  56.5 1944 FALSE
##
## 5 California 47.6 1948 FALSE
## 6 California
                 42.7 1952 FALSE
## 7 California 44.3 1956 FALSE
## 8 California
                 49.6 1960 FALSE
## 9 California
                  59.1 1964 FALSE
## 10 California
                  44.7 1968 FALSE
## # ... with 12 more rows
```



We map year on the x-axis, the vote share for Democrats demVote on the y-axis and add a geom\_line() layer:

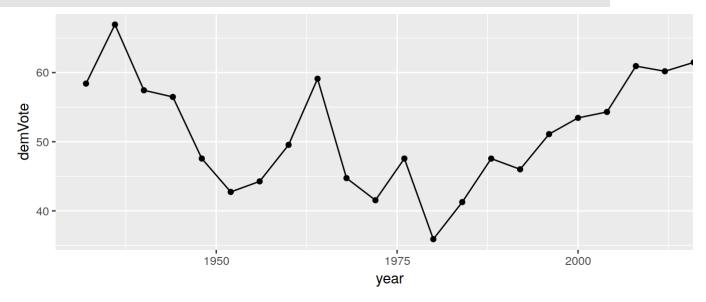
 $ggplot(cal\_pres, aes(x = year, y = demVote)) + geom\_line()$ 





We can additionally add points like in a scatterplot:

```
ggplot(cal_pres, aes(x = year, y = demVote)) +
  geom_line() +
  geom_point()
```





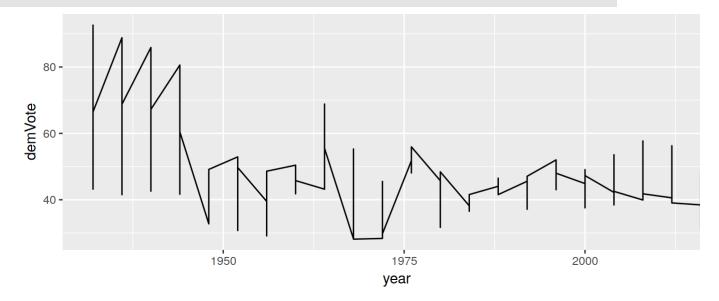
Again, we'll plot the historical election results from four states (data set presidentialElections from package pscl) stored in an object sampled\_pres:

```
## # A tibble: 88 x 4
##
                  demVote year south
     state
     <chr>
                    <dbl> <int> <lgl>
##
##
   1 Louisiana
                     92.8 1932 TRUE
   2 Maine
                     43.2
                           1932 FALSE
##
   3 South Dakota
                     63.6 1932 FALSE
##
   4 Tennessee
                     66.5 1932 TRUE
##
##
   5 Louisiana
                     88.8 1936 TRUE
   6 Maine
                     41.5
                           1936 FALSE
   7 South Dakota
                    54.0
                           1936 FALSE
##
   8 Tennessee
##
                     68.8
                           1936 TRUE
## 9 Louisiana
                     85.9
                           1940 TRUE
## 10 Maine
                     48.8
                           1940 FALSE
## # ... with 78 more rows
```



If we simply use the same command as before, we produce some interesting chaos:

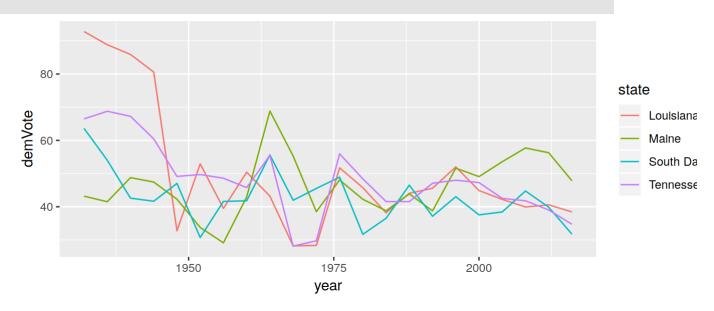
 $ggplot(sampled_pres, aes(x = year, y = demVote)) + geom_line()$ 





We have to add another aesthetic mapping (color = state) in order to tell apart the states' lines:

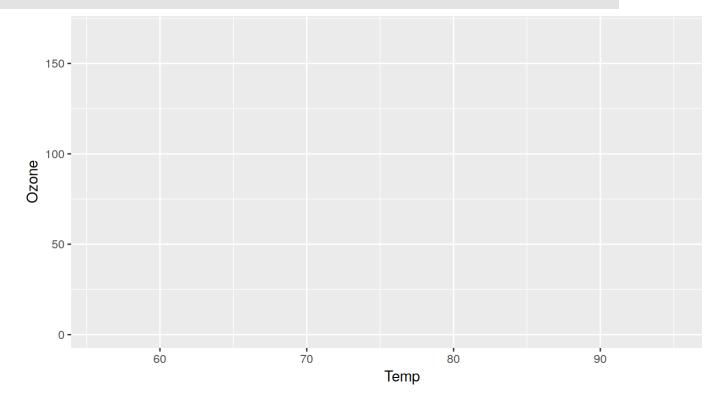
ggplot(sampled\_pres, aes(x = year, y = demVote, color = state)) + geom\_line(





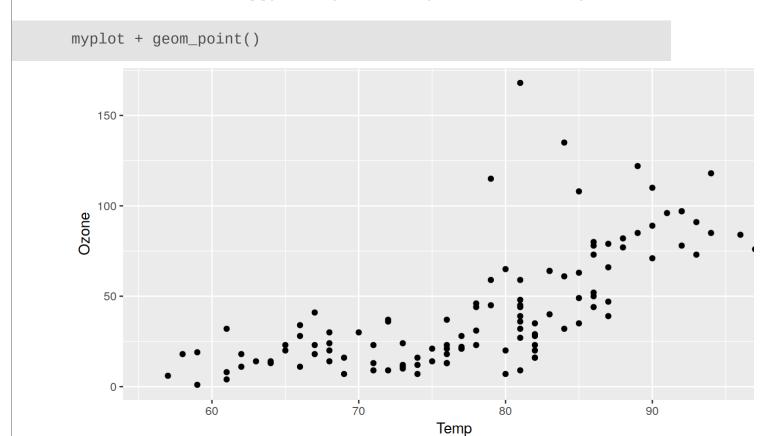
A ggplot object can be assigned a name just as any other object in R:

```
myplot <- ggplot(airquality, aes(x = Temp, y = Ozone))
myplot # shows an "empty" plot</pre>
```





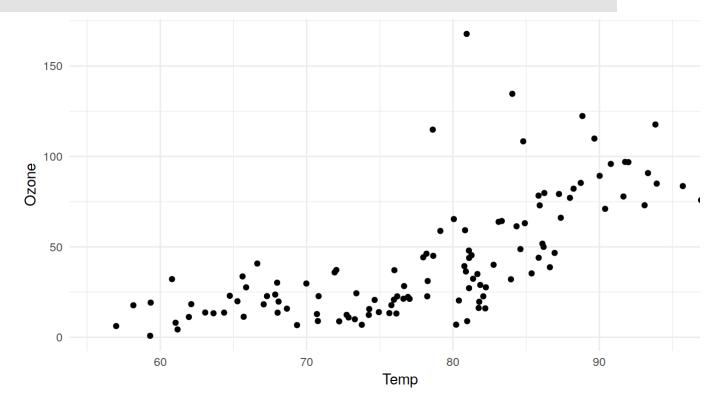
You can re-use the ggplot object and try out different layers:





You can re-use the ggplot object and try out different layers or themes:

myplot + geom\_point(position = position\_jitter()) + theme\_minimal()





You can eventually save the plot to disk with ggsave():

There are several options to configure the output file (see ? ggsave):

- plot dimensions (by default in inch)
- plot resolution
- · format (PNG, PDF, etc.) determined by file extension



#### Common mistakes

A very common mistake is to accidentally put + on a new line:

Error: Cannot use "+.gg()" with a single argument. Did
you accidentally put + on a new line?

The + operator must appear before the line break (the same is true for other operators like %>% used in dplyr):

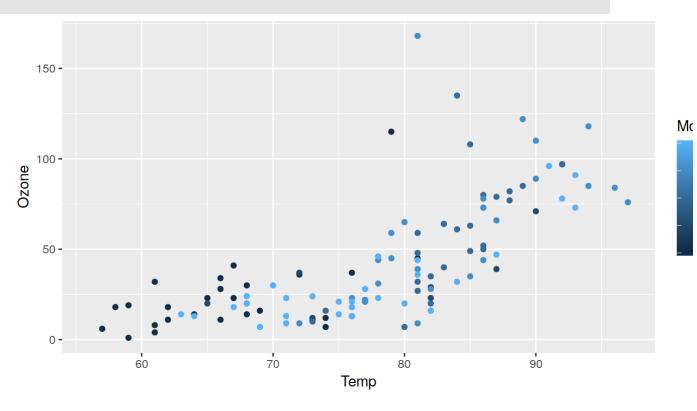
```
ggplot(airquality, aes(x = Temp, y = Ozone)) +
  geom_point()
```



#### **Common mistakes**

The type of your variables determines its scale for plotting. E.g. here you might want to use a discrete scale:

```
ggplot(airquality, aes(x = Temp, y = Ozone, color = Month)) +
  geom_point()
```

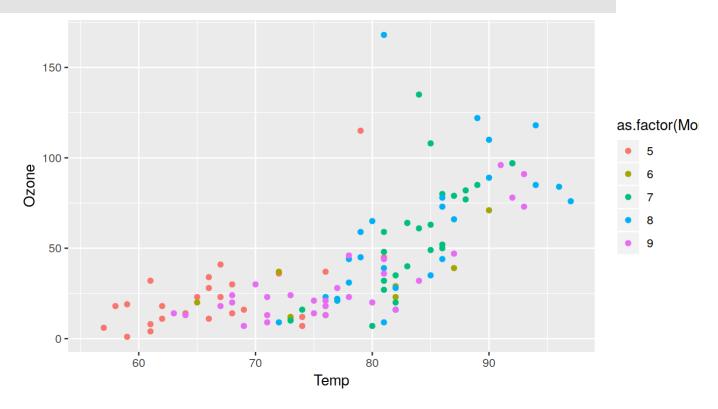




#### **Common mistakes**

Converting the numerical to a factor tells ggplot that a discrete scale is appropriate:

 $ggplot(airquality, aes(x = Temp, y = Ozone, color = as.factor(Month))) + geom_point()$ 





#### What we didn't cover

This was only a short intro about a few types of plots that can be made with ggplot2. For more advanced plots you should learn about:

- other geoms that allow to create other types of plots
- facets to create "small multiples"
- scales to adjust colors, legends, scale intervals, etc.
- themes to adjust the overall appearance of a plot



#### ggplot extensions

There are several packages that extend ggplot's capabilities:

- <u>ggmap</u>: Spatial visualization (plot geographic data on maps)
- ggraph: Graphs and networks
- <u>ggdag</u>: Analyze and create elegant Directed Acyclic Graphs (DAGs)
- ggmosaic: Mosaic plots
- · ggwordcloud: Word clouds
- gghighlight: Highlight lines and points
- cowplot: Combine multiple labelled plots
- plotly: Create interactive web graphics



# Documentation and other resources

The documentation is excellent. If you don't know how a "geom" can be controlled, have a look at it's documentation, e.g.

#### [...] Aesthetics:

'geom\_point' understands the following aesthetics (required aesthetics are in bold):

- \*/x/\*
- · \*/V/\*
- 'alpha'
- 'colour'
- 'fill'
- 'group'
- 'shape'
- 'size'
- 'stroke'

#### [...]

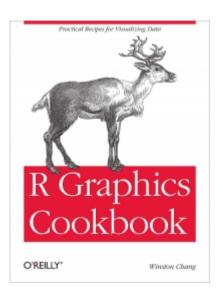
- $\rightarrow$  you must specify the aesthetics x and y
- $\rightarrow$  you can make several other properties (e.g. transparency or fill color) dependent on some variable



# Documentation and other resources

For more, see:

- ggplot2 website incl. reference: https://ggplot2.tidyverse.org/
- · W. Chang, R Graphics Cookbook
- The R Graph Gallery: https://www.r-graphgallery.com/





#### **Tasks**

See dedicated tasks sheet on the tutorial website.

