# Visualization for Data Science in R

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Data Matters 2022

https://www.angelazoss.com/RVis-2Day/

Try right now:
Open RStudio
Try running "library(tidyverse)"
Tell me about any errors

### Schedule, Day 1

Session	Topics	Duration
Session 1	Visualization and data science Intro, setup, basic ggplot2 syntax	9:30 a.m. – 10:35 a.m.
Morning break		10:35 a.m. – 10:50 a.m.
Session 2	Trying more charts	10:50 a.m. – 11:55 a.m.
Lunch		11:55 a.m. – 1:10 p.m.
Session 3	Customizing plots, saving charts out	1:10 p.m. – 2:15 p.m.
Afternoon break		2:15 p.m. – 2:30 p.m.
Session 4	Plot inheritance, advanced examples	2:30 p.m. – 3:35 p.m.
Q&A		3:35 p.m. – 3:40 p.m.

### Schedule, Day 2

Session	Topics	Duration
Session 1	ggplot2 review, advanced techniques	9:30 a.m. – 10:35 a.m.
Morning break		10:35 a.m. – 10:50 a.m.
Session 2	Simple interactive plots	10:50 a.m. – 11:55 a.m.
Lunch		11:55 a.m. – 1:10 p.m.
Session 3	Intro to Shiny	1:10 p.m. – 2:15 p.m.
Afternoon break		2:15 p.m. – 2:30 p.m.
Session 4	Shiny examples and practice	2:30 p.m. – 3:35 p.m.
Q&A		3:35 p.m. – 3:40 p.m.

### Set up environment

- R
- RStudio
- packages

#### Packages:

- tidyverse
- readxl
- markdown
- knitr
- shiny
- plotly

- DT
- crosstalk
- flexdashboard
- maps
- mapproj
- sf

Visualization for Data Science

### Why visualize in R?

- Quickly explore data
- Save time switching to another tool
- Use charts to inspire new analyses and vice versa
- Reproducibility

### Why care about reproducibility?

- Open science makes review easier
- Increasingly a requirement
- Saves you a lot of time trying to figure out what you did last time!

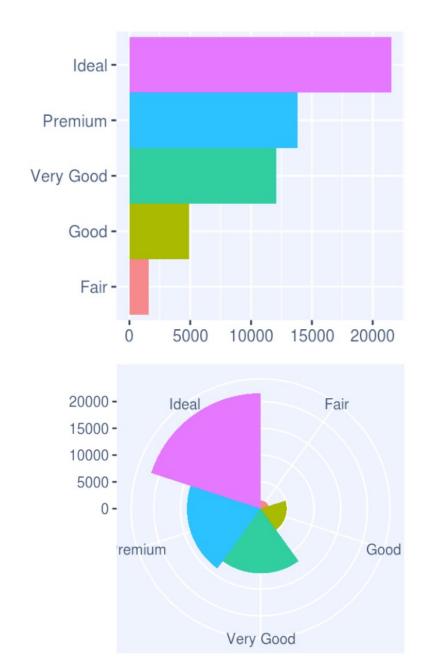
"Your closest collaborator is **you** six months ago, but you don't reply to emails."

- Mark Holder

# ggplot2

### What is ggplot2?

an R package designed to create plots based on a theory of the grammar of graphics.



http://r4ds.had.co.nz/data-visualisation.html

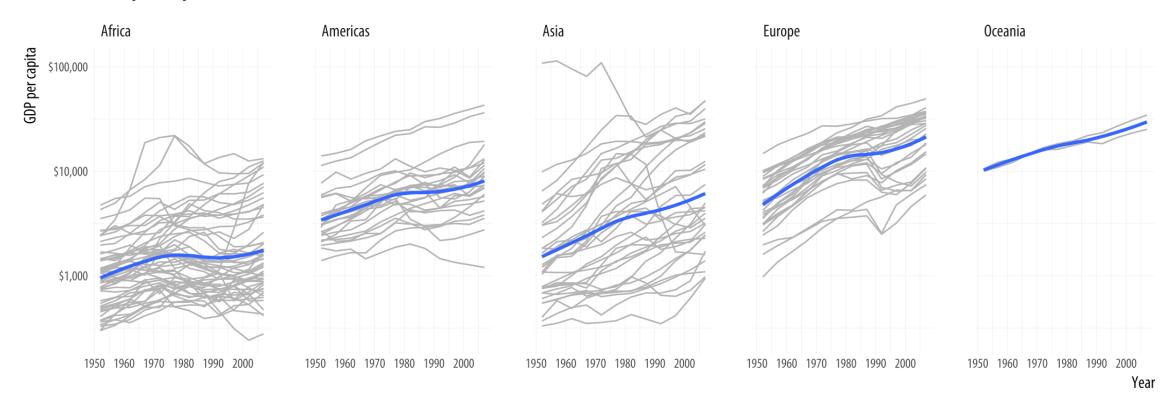
### Grammar of graphics

- 1. DATA: a set of data operations that create variables from datasets
- 2. TRANS: variable transformations (e.g., rank)
- 3. SCALE: scale transformations (e.g., log)
- 4. COORD: a coordinate system (e.g., polar)
- 5. ELEMENT: graphs (e.g., points) and their aesthetic attributes (e.g., color)
- 6. GUIDE: one or more guides (axes, legends, etc.).

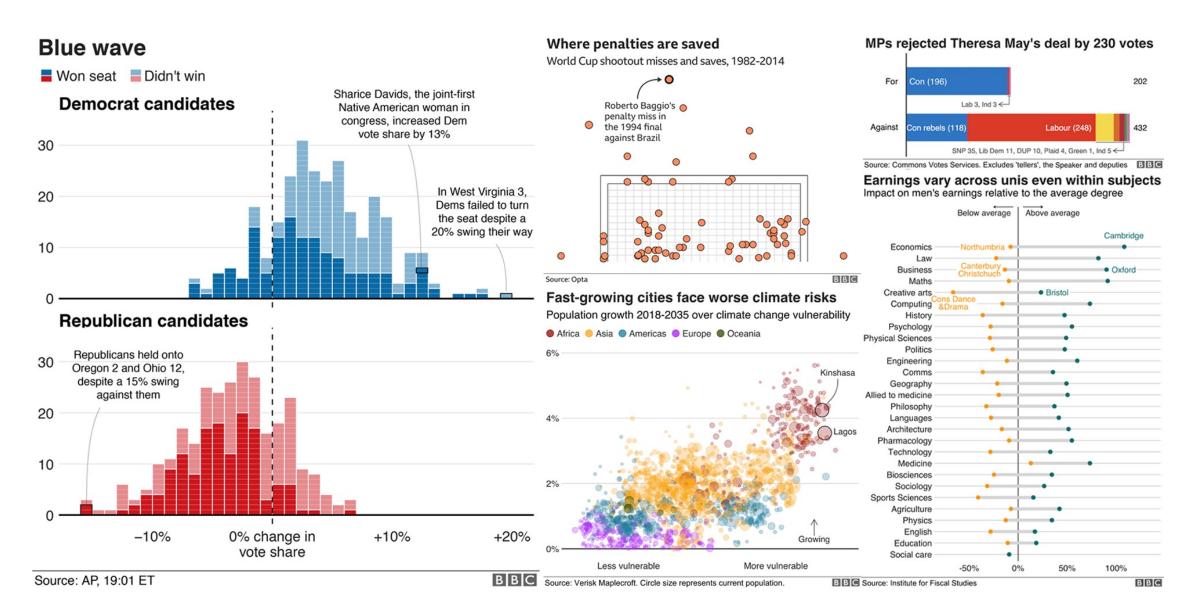
Wilkinson, Leland. (2005). The grammar of graphics (2<sup>nd</sup> ed). New York: Springer.

## ggplot2 examples

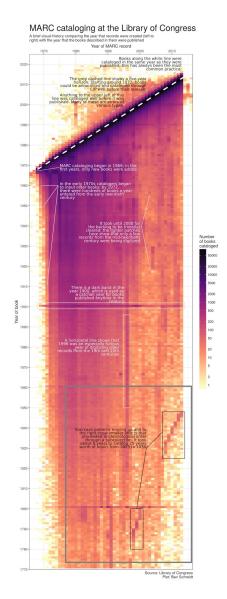
#### **GDP** per capita on Five Continents

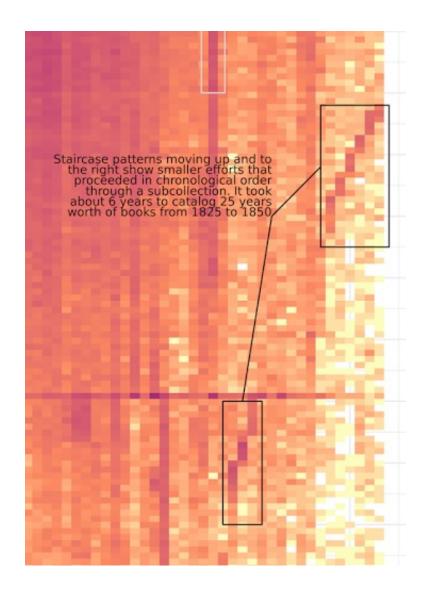


http://socviz.co/groupfacettx.html









http://sappingattention.blogspot.com/2017/05/a-brief-visual-history-of-marc.html

### Why ggplot2 instead of base R?

- nice defaults
- easy faceting
- (arguably) more natural syntax
- can switch chart types more easily

"Why I use ggplot2", David Robinson http://varianceexplained.org/r/why-I-use-ggplot2/

### R vs. Excel, Tableau, etc.

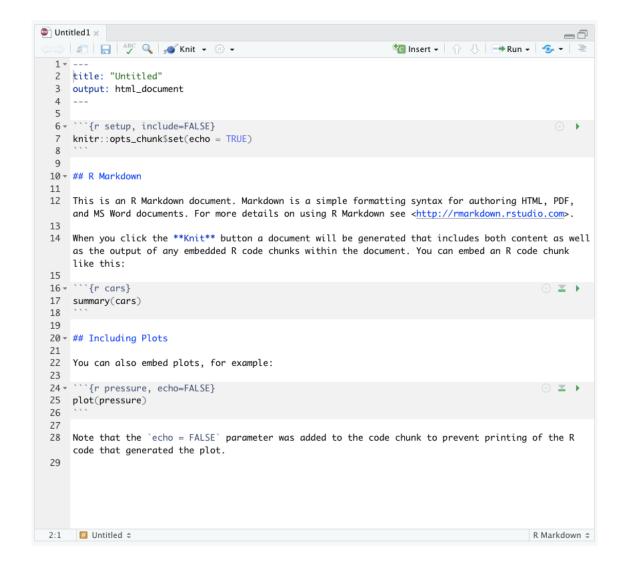
#### Questions to ask:

- Are you already using R? Why switch?
- Are you going to have to share this process or reproduce it? Try R!
- Is it a quick project, or will others work on it? Maybe Excel is fine.
- Do you need to try a bunch of charts quickly, build interactive components, etc.? Tableau might be more powerful and faster.

# Working in RStudio

### R Markdown files

- Blend "normal" text (using Markdown syntax for formatting) with code chunks and their output
- Can be compiled ("knit") into other formats (HTML, Word, PDF)
- Similar to Jupyter Notebooks for Python
- NB: The next generation of R Markdown is Quarto



### Why R Markdown?

- Plots show up inline
- Easier to incorporate explanatory text and materials
- Like to be able to easily run one chunk at a time

Caution: Running things out of order can mean your code won't work again later. Clear your environment often and run code chunks in order to be safe.

#### R Markdown test

- File → New File → R Markdown
- Click OK to accept defaults
- Type inside the first few lines to edit the YAML header (edit title, add author, etc.)
- Add a new R code chunk at the end of the file using Insert → R
- Type some R code inside the code chunk:

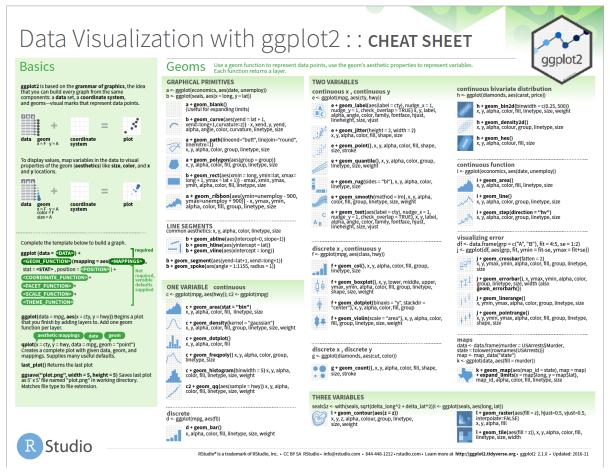
#### library(tidyverse)

Run the new code chunk

```
29
30 ▼ ```{r}
31
32 library(tidyverse)
33
34
```
```

### ggplot2 Cheat Sheet

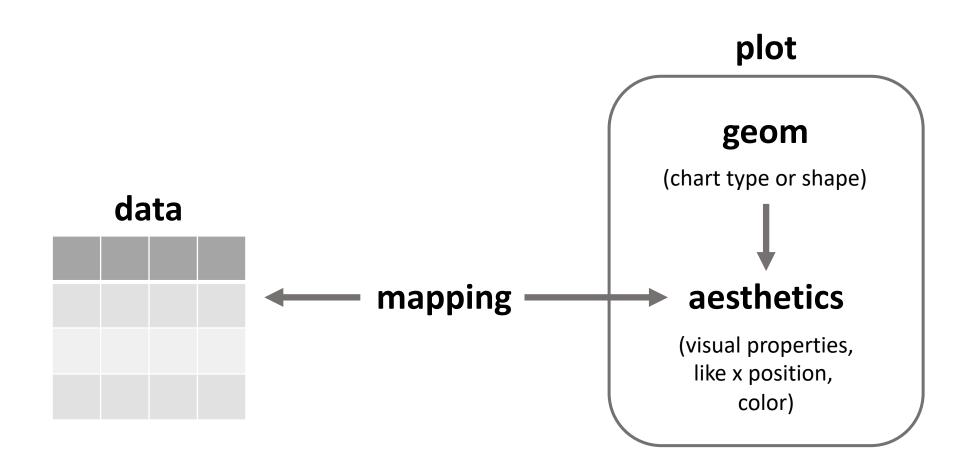
Help →
Cheatsheets →
Data Visualization with ggplot2



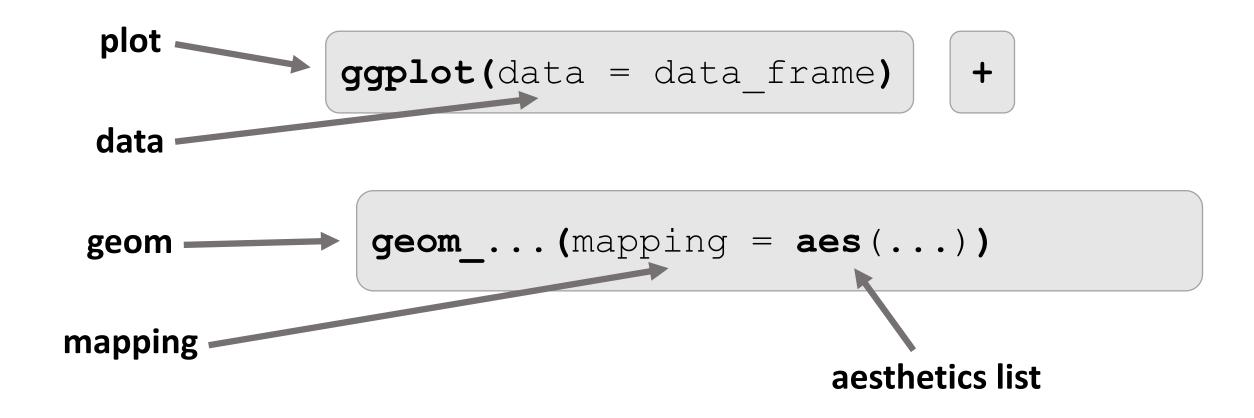
https://www.rstudio.com/resources/cheatsheets/#ggplot2

ggplot2: making a basic plot

### Basic elements in any ggplot2 visualization



### Template for a simple plot



### 1. Set the data

"iris"

| Petal.Width | Petal.Length | Species    |
|-------------|--------------|------------|
| 0.3         | 1.4          | setosa     |
| 1.3         | 4.0          | versicolor |
| 2.1         | 5.7          | virginica  |

ggplot(data=iris)

### 2. Choose a shape layer

"iris"

| Petal.Width | Petal.Length | Species    |
|-------------|--------------|------------|
| 0.3         | 1.4          | setosa     |
| 1.3         | 4.0          | versicolor |
| 2.1         | 5.7          | virginica  |

```
ggplot(data=iris) + geom_point()
```

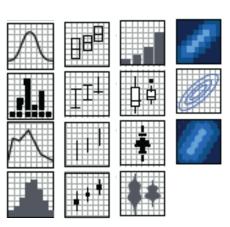
Error: geom\_point requires

the following missing

aesthetics: x and y

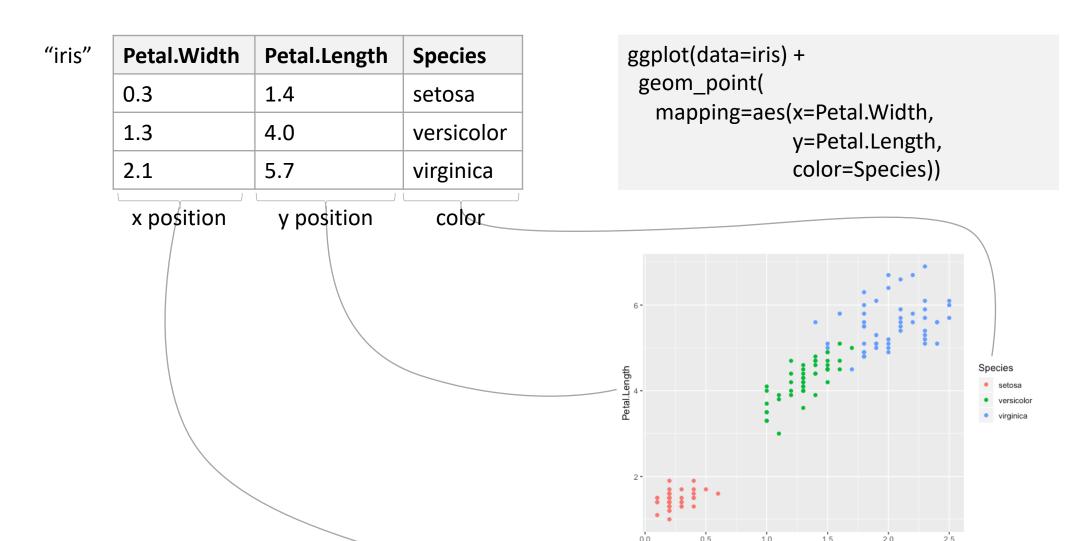
### Types of geoms

- geom\_bar()
- geom\_point()
- geom\_histogram()
- geom\_map()
- etc.



http://bit.ly/ggplot2-cheatsheet

### 3. Map variables to aesthetics

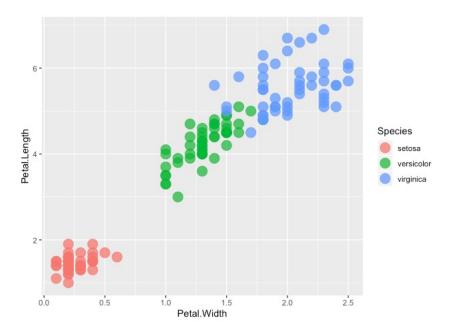


### 4. Add non-variable adjustments

"iris"

| Petal.Width | Petal.Length | Species    |
|-------------|--------------|------------|
| 0.3         | 1.4          | setosa     |
| 1.3         | 4.0          | versicolor |
| 2.1         | 5.7          | virginica  |

```
ggplot(data=iris) +
geom_point(
mapping=aes(x=Petal.Width,
y=Petal.Length,
color=Species),
size=5, alpha=.75)
```



### Debugging code

- Start simple
- If you see an error:
  - read error message for hints
  - check for problems with spelling/punctuation marks
- Get code to run without errors
- Check result to see if it makes sense

- Add a small change
- Get code to run without errors
- Check result to see if it makes sense
- etc.

# Morning Break

# Exercise 1: Inclusiveness Index

https://belonging.berkeley.edu/inclusivenessindex

### Get workshop files

URL: <a href="https://github.com/amzoss/RVis-2Day">https://github.com/amzoss/RVis-2Day</a>

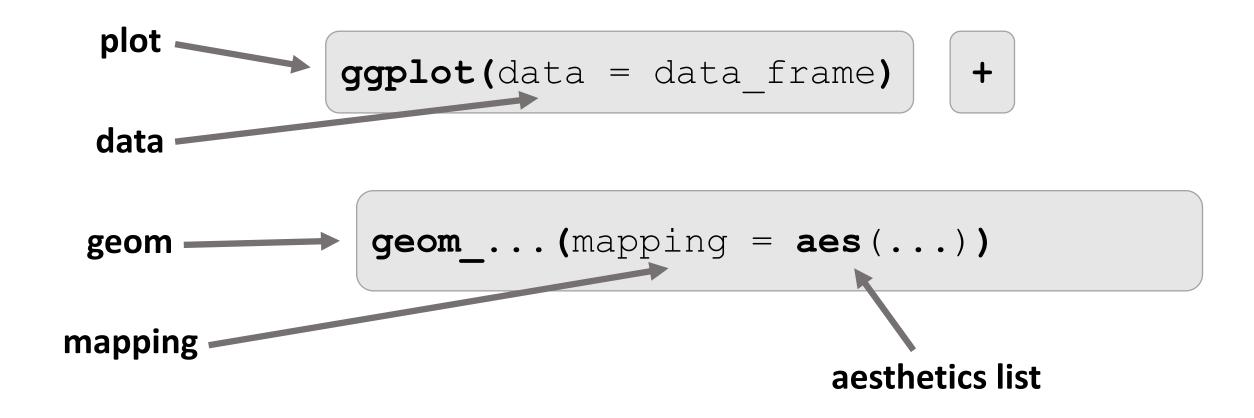
#### On GitHub:

- Click green "Code" button and select "Download ZIP"
- Unzip files on your laptop
  - Windows: Double-click, then look for "Extract Files" at the top
  - Mac: Double-click

#### In RStudio:

- Project → New project...
- Existing directory
- Select unzipped folder
- Create Project

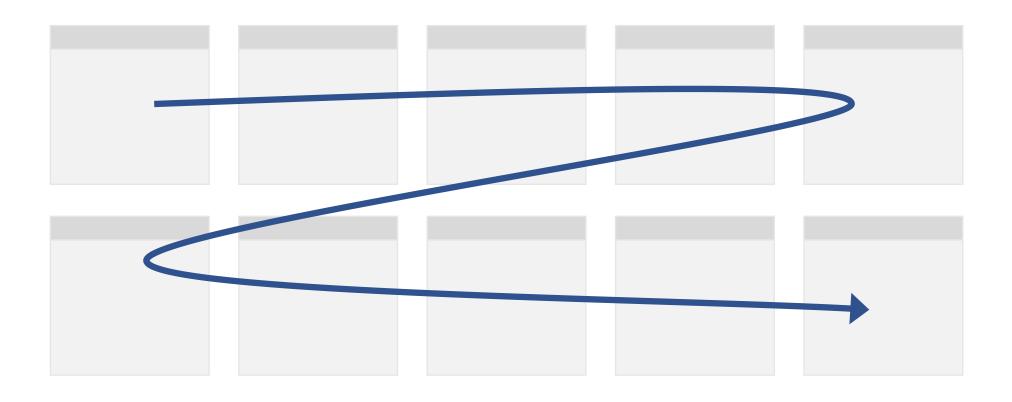
### Template for a simple plot



## Creating repeated charts

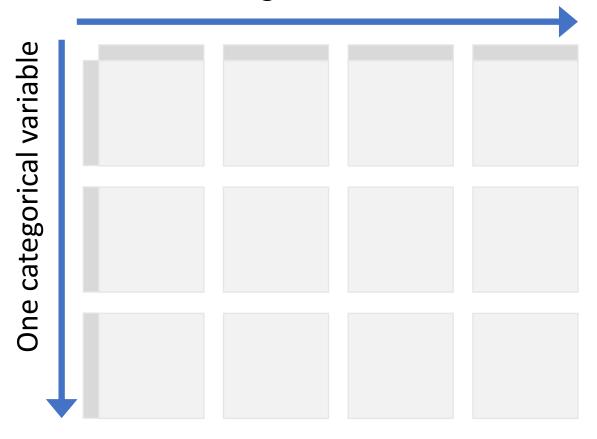
facet\_wrap()

+ facet\_wrap(**vars**(variable))



#### facet\_grid()

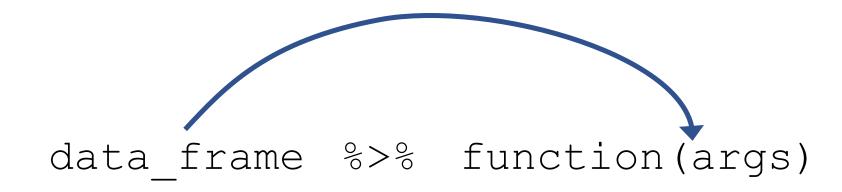
Another categorical variable



# Helpful data manipulation

#### Note: about %>%

- Loads automatically with tidyverse
- Used throughout tidyverse (except for ggplot2)
- Pushes data from the left into the function on the right



#### filter

#### Select a subset of rows

```
data %>% dplyr::filter(name == "John")
```

same as

```
dplyr::filter(data, name == "John")
```

https://www.rstudio.com/resources/cheatsheets/#dplyr

#### select

Select a subset of columns (many options!)

```
data %>% dplyr::select(id, name, age)

data %>% dplyr::select(-count)
```

https://www.rstudio.com/resources/cheatsheets/#dplyr

#### drop\_na

Remove rows with NA values, either in any column or in specified columns

```
data %>% drop_na()
```

```
data %>% drop_na(age)
```

<u>https://www.rstudio.com/resources/cheatsheets/</u> (Data Import with Tidyr Cheatsheet)

#### count

Take a dataset, group it by one or more variables, and count the number of rows grouped. Count will be stored in a variable called "n".

data %>% count(sex)

data %>% count(sex, marital\_status)

| sex | n  |
|-----|----|
| m   | 23 |
| f   | 45 |

| sex | marital_status | n  |
|-----|----------------|----|
| m   | married        | 18 |
| m   | unmarried      | 5  |
| f   | married        | 31 |
| f   | unmarried      | 14 |

<u>https://www.rstudio.com/resources/cheatsheets/</u> (Data Transformation Cheatsheet)

# Lunch

# Exercise 2: Customizing charts

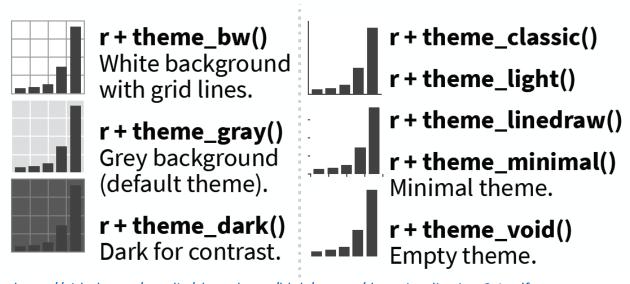
#### Scales

- Scales control how an aesthetics mapping displays in the chart, e.g.:
  - the labels that show up on the axis
  - the number of example sizes in a size legend
  - the colors used for a "fill" or "color" mapping
- Modify these properties by adding a scale layer to the chart

```
scale_x_continuous()
scale_y_log10()
scale_fill_discrete()
```

#### Themes

- Themes control properties of various visual elements, including:
  - Axis titles, text, ticks, lines
  - Plot colors, margins, text
  - Legend colors, margins, text
- Can add built-in themes as new layers, override specific theme elements, or build your own custom theme



https://github.com/rstudio/cheatsheets/blob/master/data-visualization-2.1.pdf

#### geom vs. scale vs. theme

Adding something that will appear inside the **chart coordinate space**?

You will (almost always) be adding a **geom**!

Changing the way a **variable is displayed**? (e.g., different axis breaks, different color mapping)

You will be adding a scale!

Changing the **look and feel** of the chart?

You will be adding or making changes to a **theme!** 

# More practice: Advanced ggplot2 workshop

Workshop video

**Workshop materials** 

# Accessibility

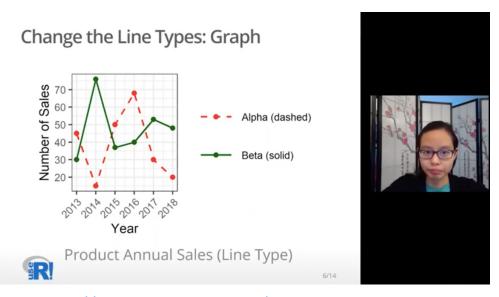
#### Low Vision

- Large text
  - See <u>"output-examples" file</u> for more sample code
- High color contrast
  - Both marks/text on background and labels on marks
  - Check with <u>savonliquide package</u>

#### Color Vision Deficiency

#### Use dual encoding (never just color)

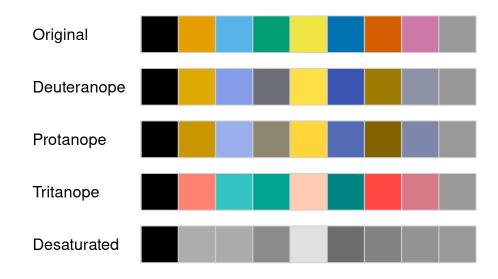
- Line color also vary line type
- Point color also vary point shape



https://www.youtube.com/watch?v=mbi JVC1arM

#### Use safe color palettes

colorspace package



http://colorspace.r-forge.r-project.org/index.html

All graphics need alternative text for screen reader users.

alt= "Chart type of type of data where reason for including chart"

Include a **link to data source** somewhere in the text

Writing alt text for data visualization/

#### Alternative Text in R and R Markdown

- ggplot2 now has <u>alt option in labs()</u>; gets read by shiny but not knitr
- in the meantime, use <u>fig.alt</u> in code chunk (new, just for HTML output)
  - can use fig.cap in code chunk as a backup, but will display in page
- embedded images in the Markdown:

```
![alt text or image title](path/to/image)
```

Note: Alt text should be relatively short.

For longer descriptions, use the <u>savonliquide package</u>

#### Converting graphics to sound, touch, text

- sonify package
- tactileR package
- BrailleR package
  - Note: set plot title, subtitle, caption using labs()

#### Accessibility Resources

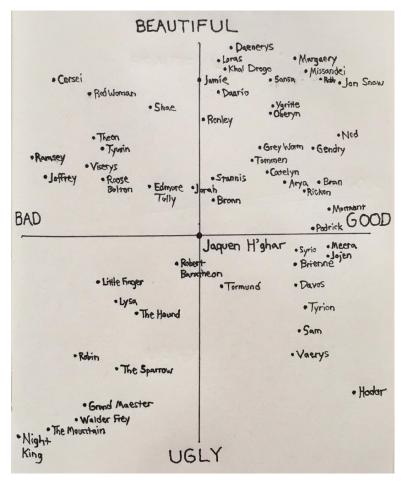
- savonliquide package
- Making betteR figures: Accessibility and Universal Design
- Highlights from the DVS accessibility fireside chat

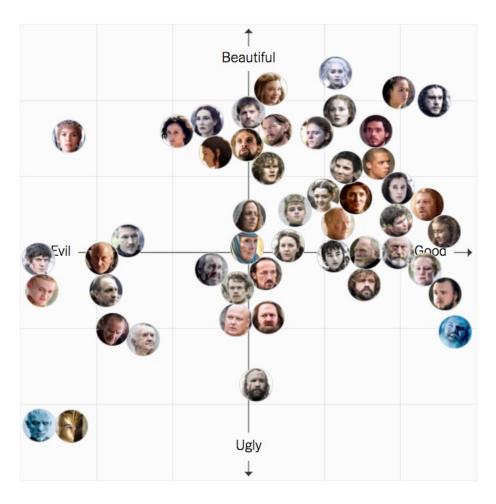
### Afternoon Break

# Exercise 3: Game of Thrones character ratings

https://www.nytimes.com/interactive/2017/08/09/upshot/game-of-thrones-chart.html

#### Game of Thrones character ratings





https://www.instagram.com/p/BWnn-YogX1n/

https://www.nytimes.com/interactive/2017/08/09/upshot/game-of-thrones-chart.html

ggplot2: inheritance

#### Template for a simple plot (review)

```
main plot function
```

```
ggplot(data = data_frame) +
```

```
shape
layer
```

#### Expanded template

# main plot function

+

#### shape layer

#### Inheritance

data and aesthetics will carry through from main function to shape layers

```
ggplot(data = data frame,
main plot
                   mapping = aes(...)
function
          geom ... (data = data frame,
  shape
                      mapping = aes(...),
   layer
                      non-variable adjustments)
          geom ... (data = data frame,
  shape
                      mapping = aes(...),
   layer
                      non-variable adjustments)
```

# Advanced topics: Mapping examples

#### Mapping resources

- <u>tigris</u> for downloading TIGER/Line shapefiles
- sf (simple features) for spatial tables
  - Spatial Data Science book
  - Spatial Data Science in the tidyverse slides
  - Spatial Data Science in the tidyverse video

#### Other helper packages

- gganonymize to randomize text in ggplot2 figures
- visdat to visualize variable classes and missing data
- ggthemes for additional themes and scales, especially ones that match software defaults (e.g., Tableau)
- <u>esquisse</u> for building ggplot2 charts interactively
- <u>colorblindr</u> for simulating color vision deficiency
- ggpubr for publication-ready plots

#### ggplot2 Resources

- General ggplot2 information http://ggplot2.tidyverse.org/
- R Graphics Cookbook (recipes for plots) <u>http://www.cookbook-r.com/Graphs/index.html</u>
- R for Data Science (online book that includes ggplot2) <u>http://r4ds.had.co.nz/</u>
- ggplot2: Elegant Graphs for Data Analysis (book by Hadley Wickham) <u>http://ggplot2.org/book/</u>
- ggplot2 cheatsheet (also in RStudio) <u>http://bit.ly/ggplot2-cheatsheet</u>
- Data Carpentry lesson on ggplot2
- Data Visualization: A Practical Introduction, by Kieran Healy
- RStudio "Visualize Data" Primer

## Thanks for your feedback!

angela.zoss@duke.edu

# ggplot2: Chart quirks

See <u>"templates" file</u>

#### Chart components/slots

Bar chart, for example:

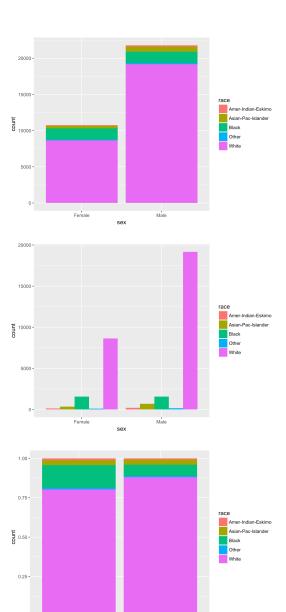
- x
   category (the names of the bars)
- y (optional)

  default is count, but can also specify a number

  (the length of the bars)
- color (optional) category (grouped or stacked bars)

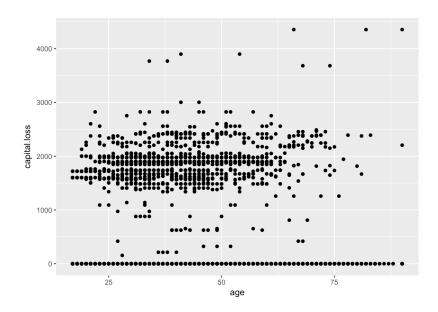
#### Bar chart

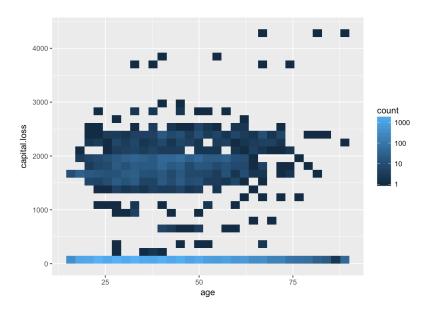
- geom\_bar() vs. geom\_col()
- count vs. identity vs. summary
- categorical vs. continuous
- stack vs. dodge vs. fill
- bar vs. pie



#### Scatter plot

- Overplotting
- point vs. bin2d





#### Line chart

- identity vs. summary
- line vs. smooth

