ggplot: The basics

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First steps: data, layers and aesthetics

Interactive plots displayed in a web-browser are all the rage nowadays with Gapminder World being a true classic of the genre.



Figure 1: Gapminder World

Today we shall recreate the above chart and in doing so learn the basics of ggplot. Key concepts we will tackle are aesthetics, layers, scales, and facets. The command library(tidyverse) loads ggplot plus other

packages for reading data, transforming data and reshaping data. Look here for more information on the tidyverse – a collection of packages with a common design philosophy.

library(tidyverse)

Each ggplot starts with *data*. **Data must be a data frame!** Today we will use data which comes in form of an R package: The gapminder data.

```
library(gapminder)
is.data.frame(gapminder)
```

[1] TRUE

head(gapminder)

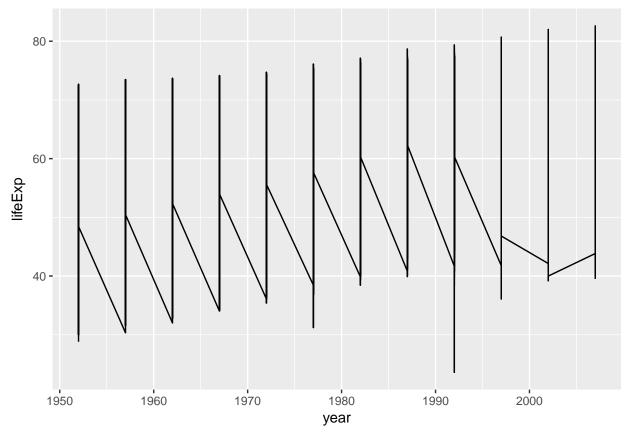
```
## # A tibble: 6 x 6
                                            pop gdpPercap
##
        country continent year lifeExp
##
         <fctr>
                   <fctr> <int>
                                  <dbl>
                                          <int>
                                                    <dbl>
## 1 Afghanistan
                     Asia 1952 28.801 8425333
                                                 779.4453
## 2 Afghanistan
                     Asia 1957
                                30.332 9240934 820.8530
## 3 Afghanistan
                     Asia 1962
                                31.997 10267083
                                                 853.1007
## 4 Afghanistan
                     Asia 1967 34.020 11537966 836.1971
## 5 Afghanistan
                     Asia 1972 36.088 13079460 739.9811
## 6 Afghanistan
                     Asia 1977 38.438 14880372 786.1134
```

First step in plotting with ggplot: provide ggplot with a data frame:

```
ggplot(data = gapminder)
```

ggplot knows about our data but nothing happens yet. We need to add a layer. We add elements to a plot by adding them with a +.

```
ggplot(data = gapminder) +
geom_line(aes(x = year, y = lifeExp))
```

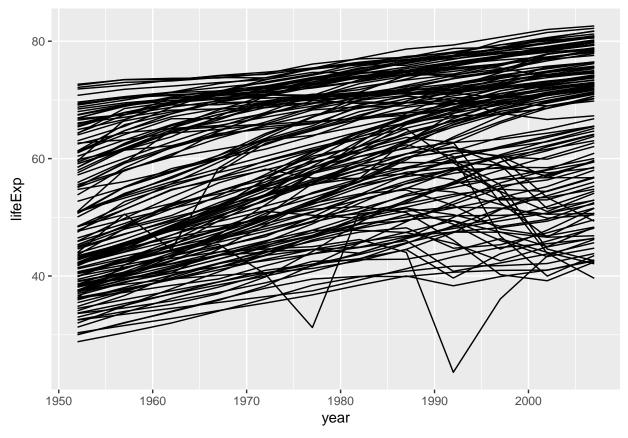


aes stands for *aesthetics*: Mappings between variables in our data and visual properties. Each column in our data frame is a variable. Visual properties are manifold and can be x, y, colour, size, shape, alpha, fill, radius, linetype, group...

We use the aes() function to map x-position to the variable Time and y-position to the variable weight. Every time you map a variable to a visual property you do it inside aes()

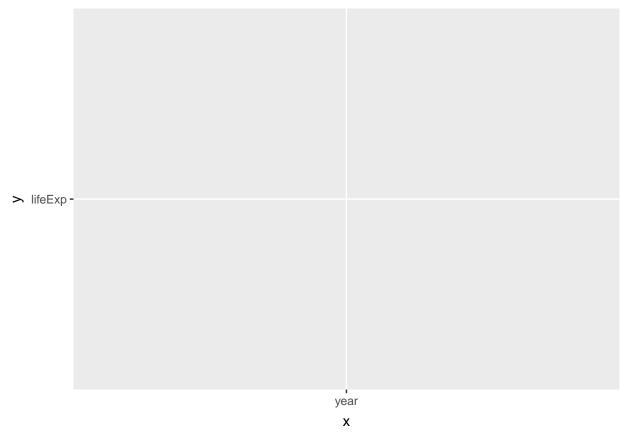
The plot looks strange. A single line is drawn across all data points. We want separate lines – one time series per country...

```
ggplot(data = gapminder) +
  geom_line(aes(x = year, y = lifeExp, group = country))
```



Note that we don't write x = gapminder\$year or y = "lifeExp". We simply spell out the name of the variable we wish to work with. ggplot is aware of the dataset we work with – it is *attached*. Quoting the variable names would actually produce unexpected results:

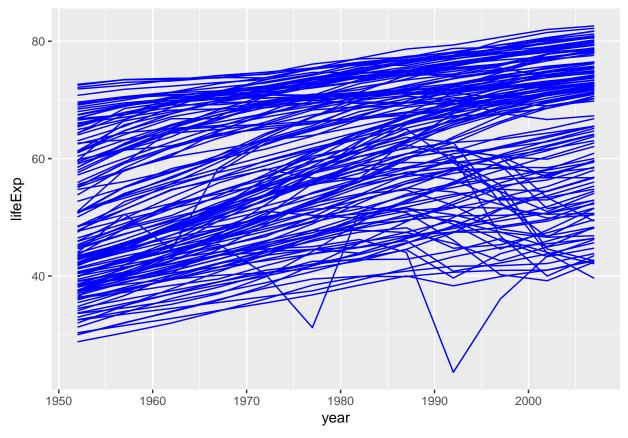
```
ggplot(data = gapminder) +
geom_line(aes(x = "year", y = "lifeExp", group = "country"))
```



What happened? ggplot interpreted the quoted strings as raw data instead of variable names of our data frame. It then tries to plot it... Always use unquoted column names to address the variables in your data.

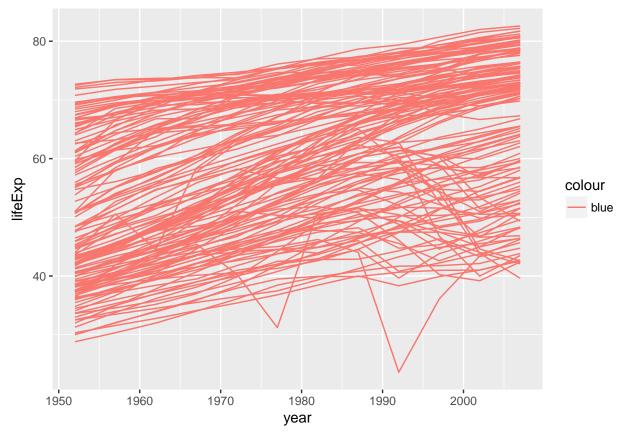
Let's colour all of the lines blue.

```
ggplot(data = gapminder) +
geom_line(aes(x = year, y = lifeExp, group = country), colour = "blue")
```



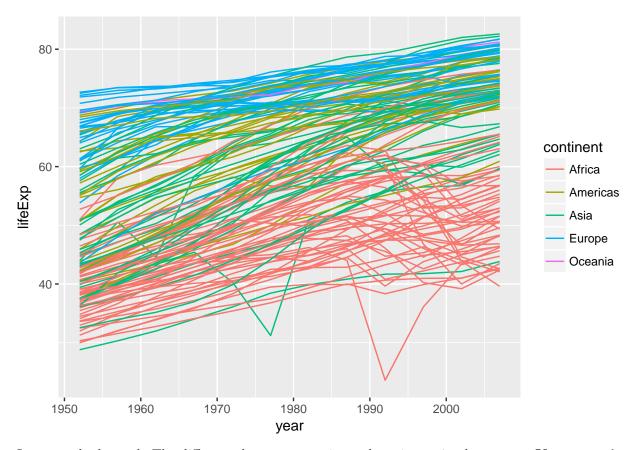
We wrote colour = "blue" outside of the aes() function as we set the visual property to a fixed value instead of mapping a visual property to a variable in the data frame. For comparison, let's move the colour specification into the aes() function:

```
ggplot(data = gapminder) +
geom_line(aes(x = year, y = lifeExp, group = country, colour = "blue"))
```



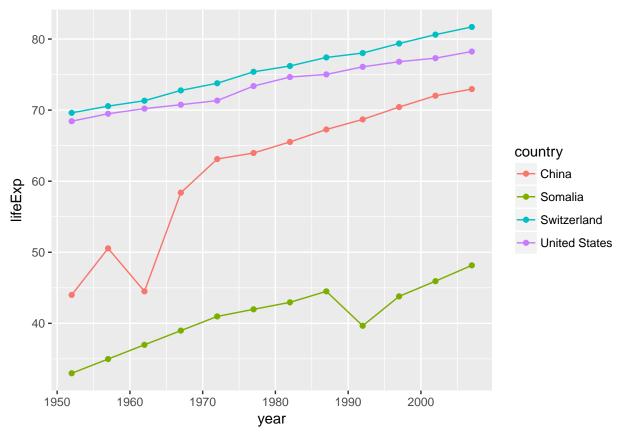
Classic ggplot moment here... "blue" gets interpreted as raw data as we have written it inside of the <code>aes()</code> function. ggplot thinks all of our rows belong to group "blue", mapped to the visual property colour. ggplot assigns a default colour scale of which the first colour is a light red. Here's the same behaviour, but this time it makes sense as we map colour to an actual variable in our data set.

```
ggplot(data = gapminder) +
geom_line(aes(x = year, y = lifeExp, group = country, colour = continent))
```



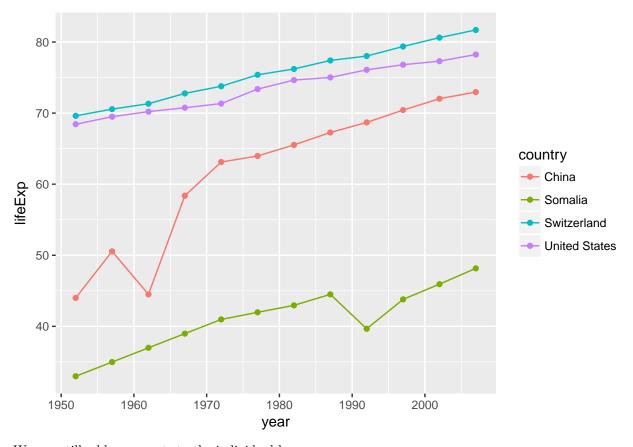
Lesson to be learned: The difference between mapping and setting a visual property. You map visual properties to variables inside aes(), you set visual properties to a fixed value outside of aes().

We can add more than a single layer to a plot. ggplot 2.0.0 comes with 27 geometries (geom). Some of them are super straightforward and just draw points or lines or rectangles. Some draw complex shapes after transforming your data in various ways. Think of geometries as flexible templates for different plot types. Combining different geometries is a common workflow in ggplot. E.g. adding geom_point to geom_line gives lines with points on them:



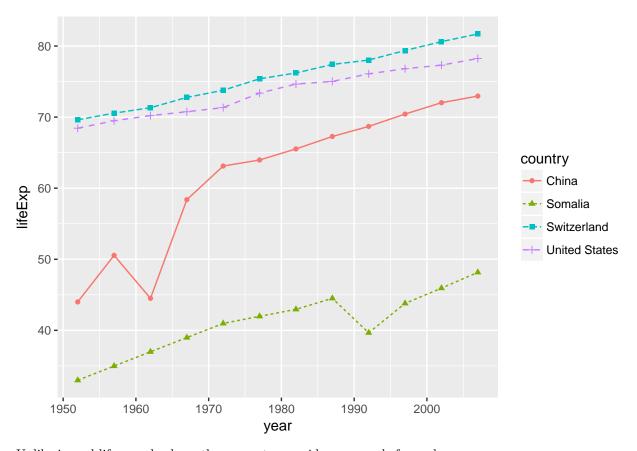
Note that we did not need to specify the group argument in the last ggplot call. The have mapped colour to country and therefore implicitly specified the grouping structure of our data. We use group only if ggplot fails to correctly guess the grouping. If we use identical mappings in our layers we can move them into the ggplot() function. Everything inside the ggplot() function is passed down to all other plot elements.

```
ggplot(data = gapminder_sub, aes(x = year, y = lifeExp, color = country)) +
  geom_line() +
  geom_point()
```



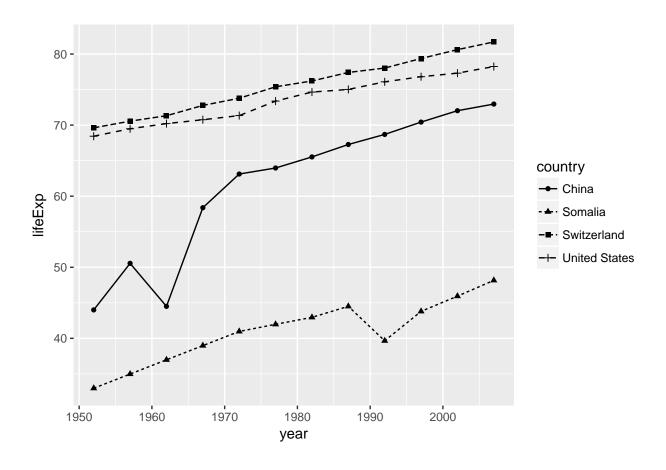
We can still add arguments to the individual layers.

```
ggplot(data = gapminder_sub, aes(x = year, y = lifeExp, color = country)) +
geom_line(aes(linetype = country)) +
geom_point(aes(shape = country))
```



Unlike in real life, we also have the power to override commands from above:

```
ggplot(data = gapminder_sub, aes(x = year, y = lifeExp, color = country)) +
geom_line(aes(linetype = country), colour = "black") +
geom_point(aes(shape = country), colour = "black")
```



Scales (versus aesthetics)

We already know that *aesthetics* are mappings from data dimensions to visual properties. They tell ggplot what goes where. What are the aesthetics in **Gapminder World**?

Data dimension	Visual property	Scale
GDP per capita	position on x-axis (x)	scale_x_*
Life expectancy	position on y-axis (y)	scale_y_*
Population size	size of plotting symbols (size)	scale_size_*
Geographical Region	colour of plotting symbols (colour)	scale_colour_*

Each aesthetic has its own scale

The four aesthetics in *Gapminder World* are connected to four different scales. The scales are named after the corresponding aesthetic. The naming scheme is scale_<name of aesthetic>_<continuous|discrete|specialized>.

Aesthetics specify the what, scales specify the how

Which colour to use for which level in the data? Where to put the labels on the axis? Which labels to put? The size of the largest plotting symbol, the name of the legends, log-transformation of the y-axis, the range of the axis... These are all examples of scale specifications – specifications on how to map a data dimension to a visual attribute.

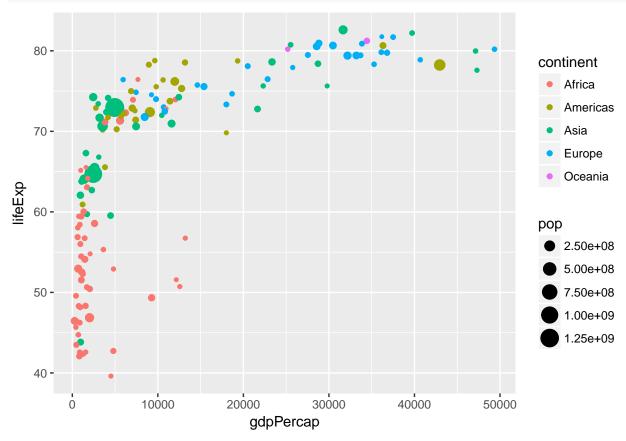
Off to work!

head(gapminder)

```
## # A tibble: 6 x 6
                                               pop gdpPercap
##
         country continent year lifeExp
##
          <fctr>
                    <fctr> <int>
                                    <dbl>
                                             <int>
                                                        <dbl>
## 1 Afghanistan
                      Asia
                            1952
                                   28.801
                                           8425333
                                                    779.4453
## 2 Afghanistan
                      Asia
                            1957
                                   30.332
                                           9240934
                                                    820.8530
## 3 Afghanistan
                             1962
                                   31.997 10267083
                                                    853.1007
                            1967
## 4 Afghanistan
                                   34.020 11537966
                                                    836.1971
                      Asia
## 5 Afghanistan
                             1972
                                   36.088 13079460
                                                    739.9811
## 6 Afghanistan
                      Asia
                            1977
                                   38.438 14880372
                                                   786.1134
```

The data already looks tidy. All we have to do is to subset to a single year. Let's see what ggplot produces if we simply specify the aesthetics to an appropriate geometry.

```
gapminder %>%
  filter(year == 2007) %>%
  ggplot(aes(x = gdpPercap, y = lifeExp, size = pop, colour = continent)) +
  geom_point()
```

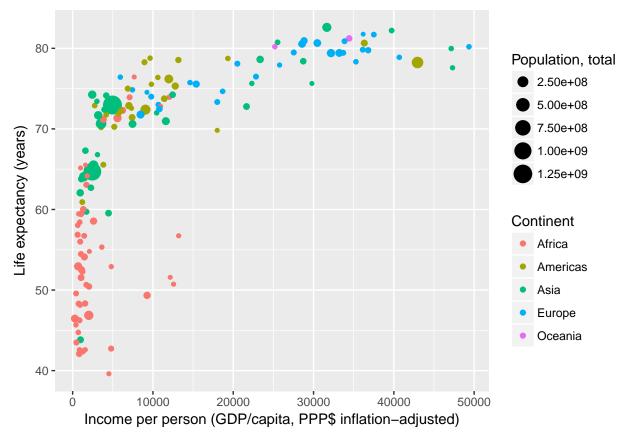


A solid foundation. But to close in on the Gapminder World chart we need to customize our scales.

When changing scale attributes we have to make sure to make the changes on the appropriate scale. Just ask yourself:

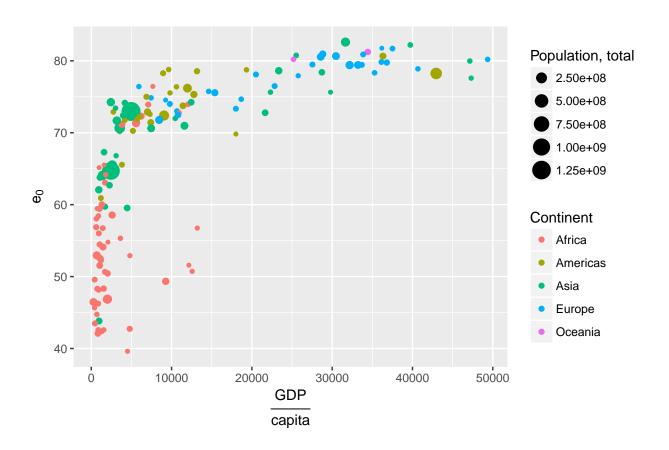
- What aesthetic does the scale correspond to? scale_<name of aesthetic>_*
- 2) Am I dealing with a discrete or continuous variable? scale_*_<continuous|discrete> ### Scale names Once you know which scales to use, names are trivial to change.

```
gapminder %>% filter(year == 2007) %>%
    ggplot(aes(x = gdpPercap, y = lifeExp, size = pop, colour = continent)) +
    geom_point() +
    scale_x_continuous(name = "Income per person (GDP/capita, PPP$ inflation-adjusted)") +
    scale_y_continuous(name = "Life expectancy (years)") +
    scale_color_discrete(name = "Continent") +
    scale_size_continuous(name = "Population, total")
```



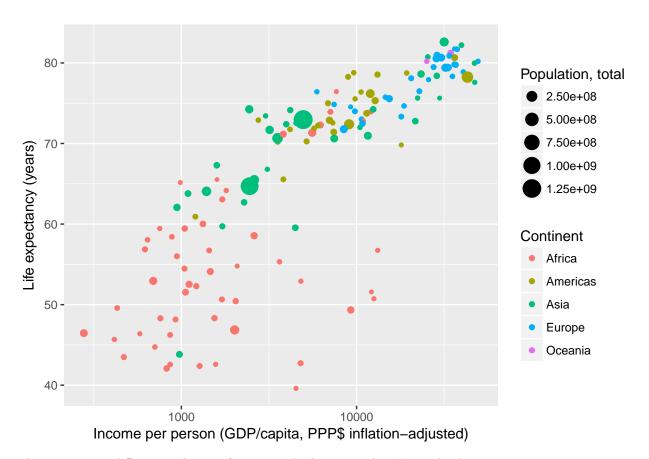
You can also use mathematical annotation in your scale names. For further information consult ?plotmath.

```
gapminder %>% filter(year == 2007) %>%
ggplot(aes(x = gdpPercap, y = lifeExp, size = pop, colour = continent)) +
geom_point() +
scale_x_continuous(name = expression(over(GDP, capita))) +
scale_y_continuous(name = expression(e[0])) +
scale_color_discrete(name = "Continent") +
scale_size_continuous(name = "Population, total")
```



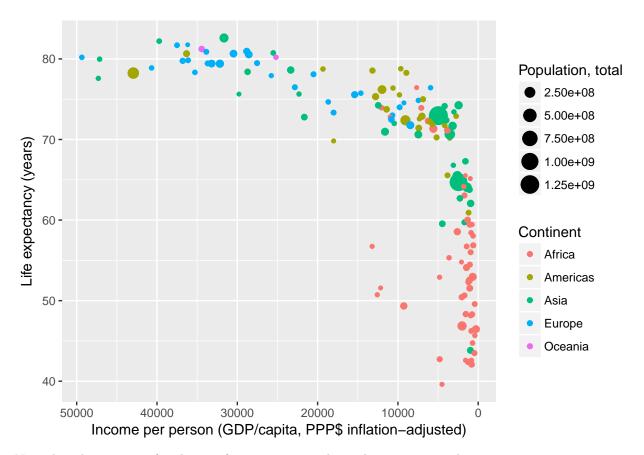
Scale transformations

Next, we deal with *scale transformations*. In **Gapminder World** the x-axis is log-scaled meaning that the log of the x-axis data is taken before plotting. However, the labels remain on the linear scale. In that regard transforming scales is different from directly transforming the underlying data.

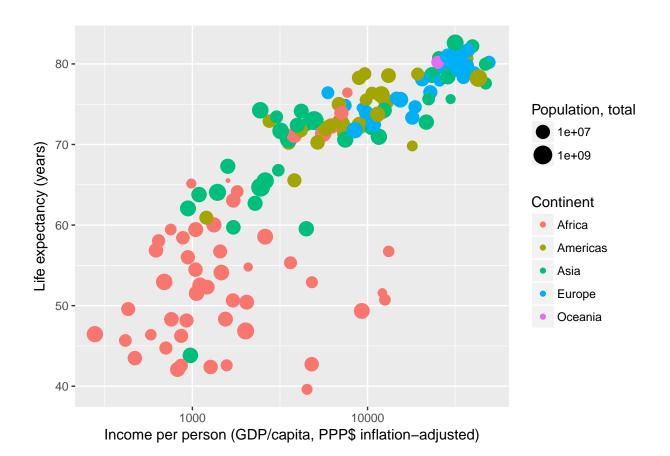


There are many different scale transformations built into ggplot. From the documentation:

Built-in transformations include "asn", "atanh", "boxcox", "exp", "identity", "log", "log10", "log1p", "log2", "logit", "probability", "probit", "reciprocal", "reverse" and "sqrt".



Note that the concept of scale transformations is not limited to position scales.

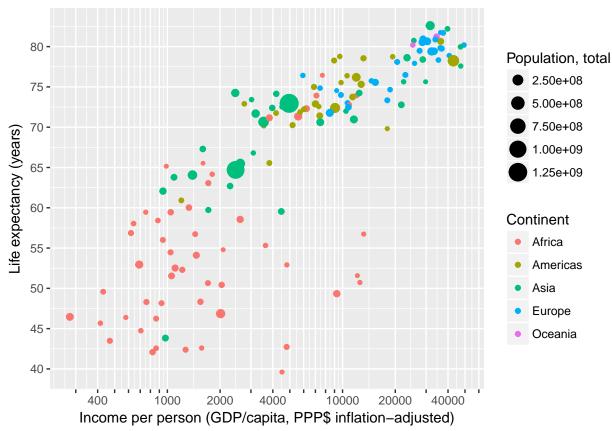


Scale breaks and labels

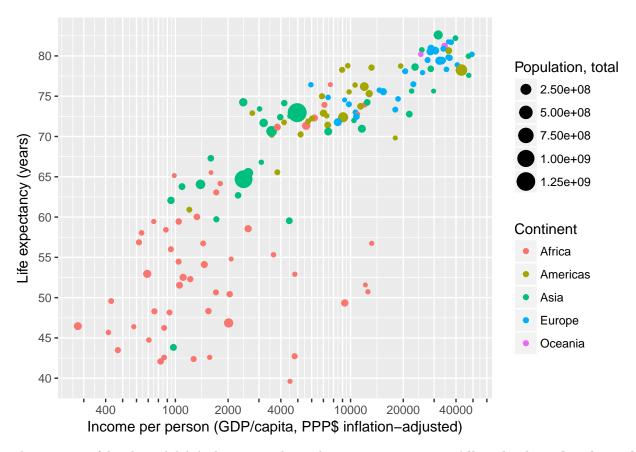
Next, we manually specify the axis *breaks* and *labels* to be the same as in *Gapminder World*. Axis breaks are the positions where tick-marks and grid-lines are drawn. Labels specify what text to put at the breaks. Breaks and labels have to be vectors of equal length.

```
gapminder %>% filter(year == 2007) %>%
  ggplot(aes(x = gdpPercap, y = lifeExp, size = pop, colour = continent)) +
  geom point() +
  scale_x_continuous(name = "Income per person (GDP/capita, PPP$ inflation-adjusted)",
                     trans = "log10",
                    breaks = c(200, 300, 400, 500,
                               600, 700, 800, 900,
                               1000, 2000, 3000, 4000, 5000,
                               6000, 7000, 8000, 9000,
                               10000, 20000, 30000, 40000, 50000,
                               60000, 70000, 80000, 90000),
                    labels = c("200", "", "400", "",
                               "1000", "2000", "", "4000", "",
                               "", "", "", "",
                                "10000", "20000", "", "40000", "",
                               "", "", "", "")) +
  scale y continuous(name = "Life expectancy (years)",
                    breaks = c(25, 30, 35, 40, 45, 50,
                               55, 60, 65, 70, 75, 80, 85)) +
```

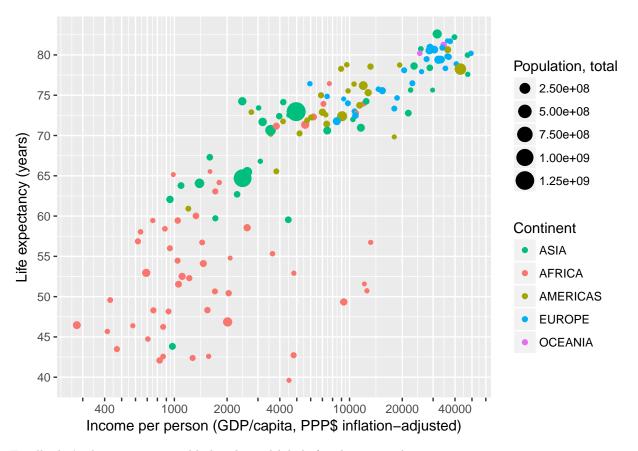




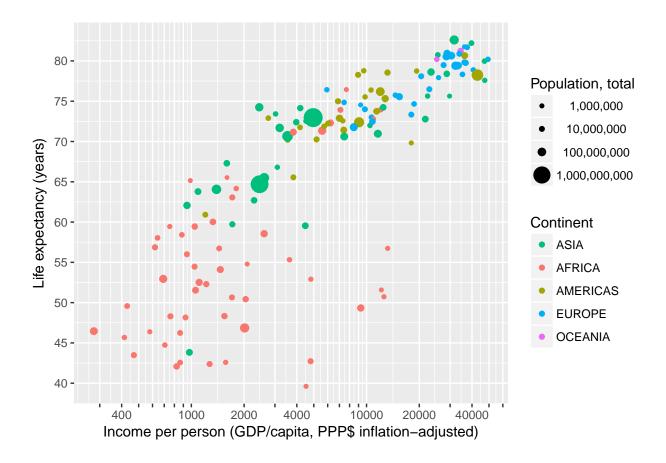
OK, that was effective but clumsy. Luckily ggplot does not care *how* we generate the vector of breaks. We can use any R function as long as it outputs a vector. Even better, instead of manually spelling out the labels for each break we can write a short function that takes the breaks as input and formats them. Much nicer code – same result.



The concept of *breaks* and *labels* does not only apply to continuous axis. All scales have breaks and labels. E.g. on a colour scale the breaks are the colour keys, the labels are – well – the labels. We reorder the items on our discrete scale by specifying the breaks in the required order. We also use an R function to capitalize the labels.



Finally, let's choose some sensible breaks and labels for the size scale.



Sidenote: levels and order in ggplot

It is easy to order items on a numerical scale. One just puts them on the number line. Usually low on the left and hight to the right. But what about discrete items? ggplot orders them according to the order of their factor levels. An example:

```
# test data
foo <- data.frame(id = 1:4,
                   sex = c("Female", "Female", "Male", "Male"))
foo
##
     id
           sex
      1 Female
##
      2 Female
##
##
   3
      3
          Male
          Male
```

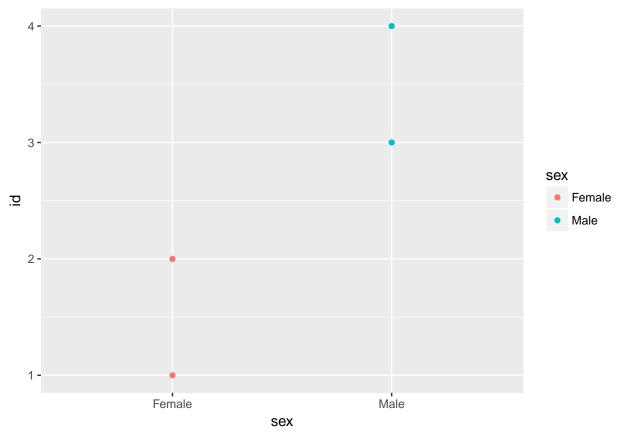
data.frame, just like ggplot, automatically converts a character vector to a factor using as.factor. The levels order of that factor follows the sequence of occurrence in the data.

```
levels(foo$sex)
```

```
## [1] "Female" "Male"
```

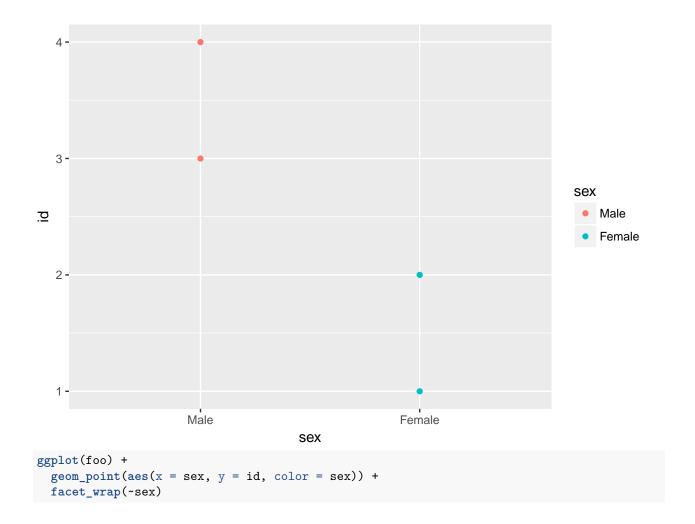
ggplot constructs discrete scales in the order of the levels of the underlying factor variable. Here, Females first, males after.

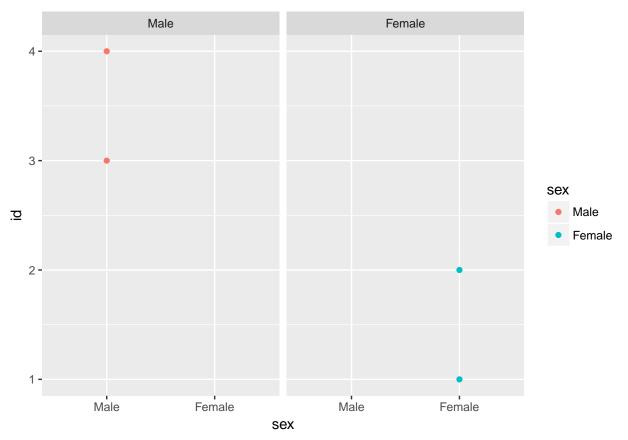
```
ggplot(foo) +
  geom_point(aes(x = sex, y = id, color = sex))
```



If we reverse the level order of the sex variable we change the way ggplot orders the discrete items.

foo\$sex





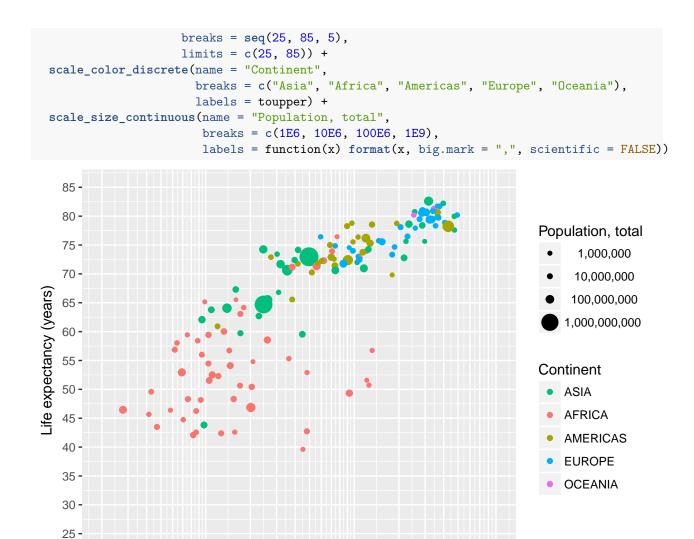
NEVER OVERRIDE THE LEVELS DIRECTLY WHEN JUST MEANING TO CHANGE THE ORDER! You'll screw up your data. In our case we just changed the sex of the participants.

```
foo$sex
```

```
## [1] Female Female Male Male
## Levels: Male Female
levels(foo$sex) <- c("Female", "Male")
foo$sex
## [1] Male Male Female Female
## Levels: Female Male</pre>
```

Scale limits

We match the maximum and minimum value of our xy-scales with those of the *Gapminder World* chart by specifying the *limits* of the scales.



Sidenote: Limiting versus zooming

200

Note that values outside of the limits will be discarded. This is of importance if you want to zoom into a plot. Here we "zoom" by changing the limits of the scales...

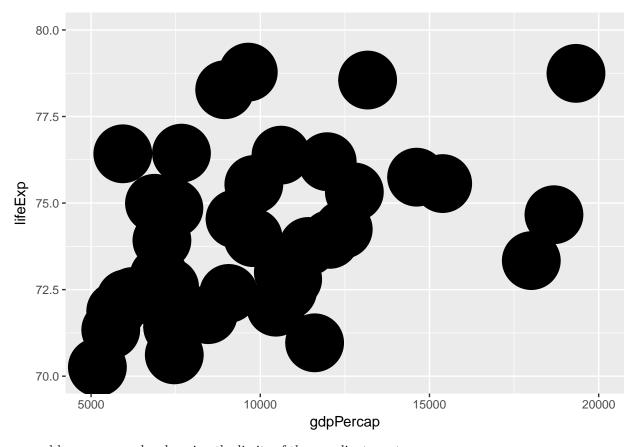
10000 20000 40000

```
gapminder %>% filter(year == 2007) %>%
ggplot(aes(x = gdpPercap, y = lifeExp)) +
geom_point(size = 20) +
scale_x_continuous(limits = c(5000, 20000)) +
scale_y_continuous(limits = c(70, 80))
```

Warning: Removed 104 rows containing missing values (geom_point).

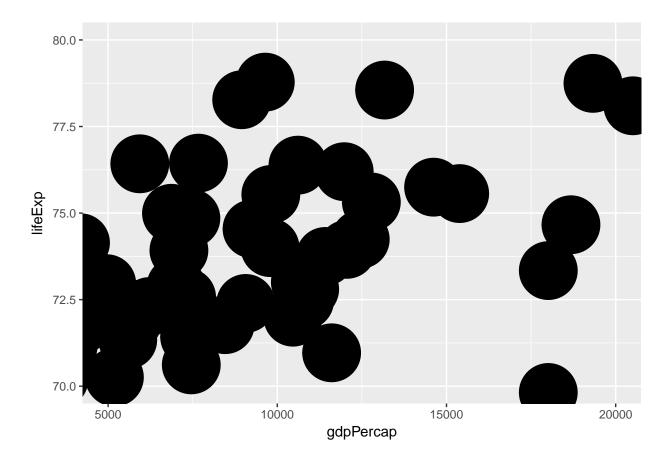
2000

Income per person (GDP/capita, PPP\$ inflation-adjusted)



 \ldots and here we zoom by changing the limits of the coordinate system

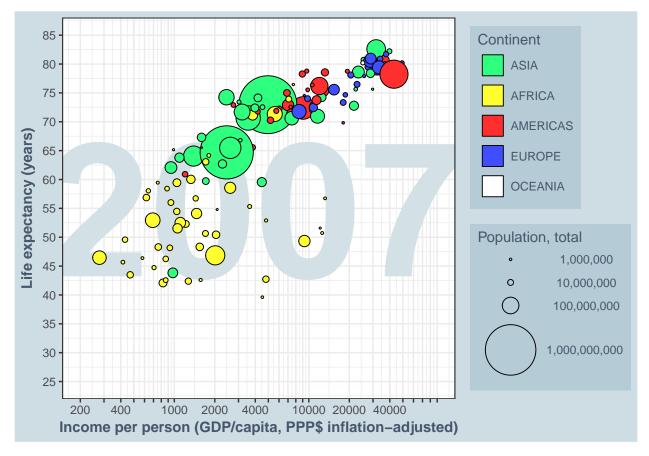
```
gapminder %>% filter(year == 2007) %>%
ggplot(aes(x = gdpPercap, y = lifeExp)) +
geom_point(size = 20) +
coord_cartesian(xlim = c(5000, 20000), ylim = c(70, 80))
```



A makeover...

As always, something to chew on for the hypermotivated.

```
gapminder %>% filter(year == 2007) %>%
  ggplot(aes(x = gdpPercap, y = lifeExp, size = pop, fill = continent)) +
  annotate(geom = "text", x = 4000, y = 55, label = 2007,
           colour = "#D3E0E6", size = 50, fontface = "bold") +
  geom_point(colour = "black", shape = 21) +
  scale_x_continuous(name = "Income per person (GDP/capita, PPP$ inflation-adjusted)",
                     trans = "log10",
                     breaks = apply(expand.grid(1:9, 10^(2:4)), 1, FUN = prod)[-1],
                     labels = function(x) ifelse(grepl("^[124]", x), x, ""),
                     limits = c(200, 90000)) +
  scale_y_continuous(name = "Life expectancy (years)",
                     breaks = seq(25, 85, 5),
                     limits = c(25, 85)) +
  scale_fill_manual(name = "Continent",
                    breaks = c("Asia", "Africa", "Americas", "Europe", "Oceania"),
                    labels = toupper,
                    values = c("Asia" = "#2FFF7F",
                               "Africa" = "#FFFF2F",
                               "Americas" = "#FF2F2F",
                               "Europe" = "\#3F4FFF",
                               "Oceania" = "white")) +
  scale_size_area(name = "Population, total", max_size = 20,
```



Further Reading

- A good place to start with ggplot.
- THE ggplot2 Cheat-Sheet. A handy reference sheet, not only compressing most of the ggplot2 functionality into 2 pages, but also outlining the underlying logic.
- The ggplot documentation contains all the information about different scales and their options along with illustrated examples.
- How to do your bread and butter graphs in ggplot
- Elegant Graphics for Data Analysis: The book by the author of ggplot himself is a good place to learn the general idea as well as the deeper functionalities of the library. yourself. All the source files are publicly available here.
- The Grammar of Graphics: ggplot is modelled after the framework for describing visualizations introduced in this book. If you are eager to learn where ggplot comes from, look here.

sessionInfo()

```
## R version 3.4.1 (2017-06-30)
## Platform: x86_64-pc-linux-gnu (64-bit)
## Running under: Ubuntu 16.04.3 LTS
##
## Matrix products: default
## BLAS: /usr/lib/libblas/libblas.so.3.6.0
## LAPACK: /usr/lib/lapack/liblapack.so.3.6.0
## locale:
##
  [1] LC_CTYPE=en_US.UTF-8
                                   LC NUMERIC=C
  [3] LC TIME=en US.UTF-8
                                   LC COLLATE=en US.UTF-8
  [5] LC_MONETARY=en_US.UTF-8
                                   LC_MESSAGES=en_US.UTF-8
##
   [7] LC_PAPER=en_US.UTF-8
                                   LC NAME=C
##
                                   LC_TELEPHONE=C
##
  [9] LC_ADDRESS=C
## [11] LC_MEASUREMENT=en_US.UTF-8 LC_IDENTIFICATION=C
##
## attached base packages:
## [1] stats
                 graphics grDevices utils
                                                datasets methods
                                                                    base
##
## other attached packages:
## [1] bindrcpp_0.2
                       gapminder_0.2.0 dplyr_0.7.2
                                                        purrr_0.2.3
## [5] readr_1.1.1
                       tidyr_0.7.1
                                       tibble_1.3.4
                                                        ggplot2_2.2.1
## [9] tidyverse_1.1.1
##
## loaded via a namespace (and not attached):
  [1] Rcpp 0.12.12
                         cellranger 1.1.0 compiler 3.4.1
                                                            plyr 1.8.4
##
  [5] bindr_0.1
                         forcats_0.2.0
                                          tools_3.4.1
                                                            digest_0.6.12
   [9] lubridate_1.6.0 jsonlite_1.5
                                          evaluate_0.10.1
                                                            nlme 3.1-131
## [13] gtable_0.2.0
                         lattice_0.20-35 pkgconfig_2.0.1
                                                            rlang_0.1.2
## [17] psych_1.7.5
                         yaml_2.1.14
                                          parallel_3.4.1
                                                            haven 1.1.0
                         httr_1.3.1
                                                            knitr_1.17
## [21] xml2_1.1.1
                                          stringr_1.2.0
## [25] hms 0.3
                         rprojroot_1.2
                                          grid_3.4.1
                                                            glue_1.1.1
## [29] R6_2.2.2
                         readxl_1.0.0
                                          foreign_0.8-69
                                                            rmarkdown_1.6
## [33] modelr_0.1.1
                         reshape2_1.4.2
                                          magrittr_1.5
                                                            backports_1.1.0
## [37] scales_0.4.1
                         htmltools_0.3.6
                                          rvest_0.3.2
                                                            assertthat_0.2.0
## [41] mnormt_1.5-5
                         colorspace_1.3-2 labeling_0.3
                                                            stringi_1.1.5
## [45] lazyeval_0.2.0
                         munsell_0.4.3
                                          broom_0.4.2
cc-by Jonas Schöley 2017
```

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