Data visualizations using R

Overview

R is flexible. Often, there is more than one way to get something done. And this is true when considering visualizations as well. Broadly, there are 3 ways in which you can create visualizations in R:

- Using base R: This refers to the set of commands and functionality available to the user without installing other packages.
- Using the lattice package: Created by Deepayan Sarkar to elevate base R's graphing capabilities. Useful for visualizing multivariate
- Using the ggplot2 package: Created by Hadley Wickham as R's implementation of the *Grammar of Graphics*. While that might sound complicated, it is essentially a framework that allows the user to describe and construct visualizations in a *layered* manner. This blog post offers a great introduction to the philosophy of the *Grammar of Graphics*.

The ggplot2 package offers a tremendous amount of functionality and customizability. It is also the most popular graphing package used by R users, making it easy to find help online (Stackoverflow is your best friend). These advantages make it an obvious choice for creating graphs in R and we will be using it in this lesson.

Intro to ggplot2

While it is challenging to briefly describe how a ggplot2 graph works, fundamentally, it is the sum of 3 different parts:

- 1. Data: such as a data frame.
- 2. Aesthetics; used to specify the axis (x and y) variables. It is also used to customize the color, size, shape etc. of the data being graphed.
- 3. Geometry; used to specify the type of graph we are interested in plotting, such as bar, line, density, scatter etc.

If you have a fresh installation of R or have never used the ggplot2 package, you will need to install it. But instead of installing the ggplot2 package, we would recommend installing the tidyverse package. This will not only install ggplot2, but a whole bunch of cool stuff like dplyr, readr, tidyr etc. Similarly, loading tidyverse would mean that you are loading these packages all at once. Check this out to see what installing and loading tidyverse does.

Tip: It is good practice to load only those packages that are required. Packages require RAM, so loading more than what is required will eventually slow your computer down. Having said so, given the relatively small dataset we are working on, it is acceptable to load the entire 'tidyverse' library.

```
In [1]: # install.packages('tidyverse')
                                                   # We already have the package installed
        library("tidyverse")
        - Attaching packages -
                                                                         - tidyverse 1.3.1 -
                             ✓ purrr 0.3.4
        ✓ ggplot2 3.3.6
           tibble 3.1.7

✓ dplyr

        ✓ tidyr 1.2.0
✓ readr 2.1.2
                           ✓ stringr 1.4.0
✓ forcats 0.5.1
        Warning message:
         "package 'tidyr' was built under R version 4.0.5"
        Warning message:
        "package 'readr' was built under R version 4.0.5"

    Conflicts

    tidvverse conflicts() —

        * dplyr::filter() masks stats::filter()
        * dplyr::lag() masks stats::lag()
```

Now that we are done with our initial setup, let us load the data we are going to plot. We will be using the EG DIB dataset.

```
In [2]: mydata <- read_csv("/Users/arkadeep/Dropbox (IDinsight)/Technical bootcamp online/Lessons/R/Data Visualization/Assets/2_d
```

We can see what the data looks like using the head() function. Assuming you are following this script on R Studio, you can click on the dataset in your environment pane. This will open the data frame for viewing in a tab.

```
In [3]: head(mydata)
```

village_id_rand	treatment	total_bl_villavg	hindi_bl_villavg	math_bl_villavg	english_bl_villavg	total_ely1_villavg	hindi_ely1_villavg	math_ely1_vil
<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<
1	1	7.051282	2.641026	2.230769	2.179487	10.120000	4.120000	3.320
2	0	7.269231	2.653846	2.615385	2.000000	10.142858	4.214286	3.35
3	1	6.142857	2.142857	2.071429	1.928572	9.000000	3.500000	2.750
4	1	7.480000	3.000000	2.320000	2.160000	11.600000	5.200000	3.466
5	0	5.352941	2.000000	2.058824	1.294118	7.181818	2.909091	2.363
6	0	8.266666	3.366667	2.600000	2.300000	12.235294	4.764706	3.823

A (very) basic graph

Suppose we are interested in analyzing the correlation between baseline and endline (year 3) total scores. A quick and easy way to do this would be through a scatter graph.

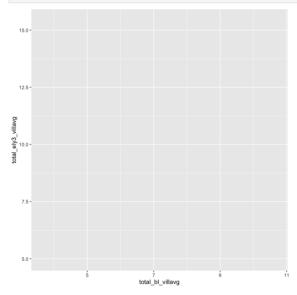
We begin by initializing a ggplot object. This is done using ggplot(). We will also provide the dataset that we want to work with. This will create an empty graph as you can see below.

Yes, the package is called ggplot2, but the object is called ggplot.

```
In [4]: ggplot(data = mydata)
```

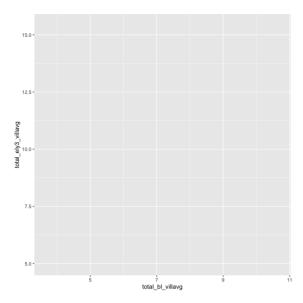
We now need to provide the aesthetic mapping. Among other things, this will tell ggplot which variable will be displayed on each of the two axes. Let us put the baseline score on the x axis and the endline year 3 score on the y axis.

```
In [5]: ggplot(data = mydata, mapping = aes(x = total_bl_villavg, y = total_ely3_villavg))
```



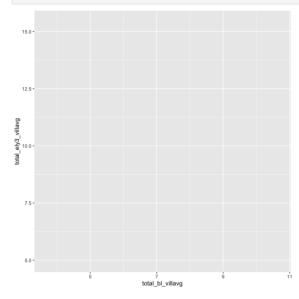
Our graph is starting to take shape! We now have the coordinate system that we are familiar with. The command above is very detailed and can be made more concise.

```
In [6]: ggplot(mydata, aes(total_bl_villavg, total_ely3_villavg))
```



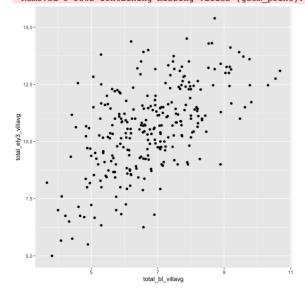
While the above command works, we recommend that you explicitly mention the x and y mapping within the aes function. That will ensure that you don't mix up your axes.

In [7]: ggplot(mydata, aes(x = total_bl_villavg, y = total_ely3_villavg))



As mentioned previously, we want to create a scatter graph to plot the correlation between two variables. Layering is at the center of ggplot syntax. So we will add the scatter points by layering it on top of the graph that we have prepared thus far. This is achieved with the + operator.

Warning message:
"Removed 5 rows containing missing values (geom_point)."



And just like that, we have a functional graph! However, before we do other things, let's unpack what is going on when we run the above command

Here's the full set of parameters (along with their default arguments) that geom_point() can accommodate:

```
geom_point(
  mapping = NULL,
  data = NULL,
  stat = "identity",
  position = "identity",
  ...,
  na.rm = FALSE,
  show.legend = NA,
  inherit.aes = TRUE
)
```

So it appears that we can pass numerous arguments inside <code>geom_point()</code>, but we are not passing anything and we are still getting a graph. So you might ask, how is this happening?

The <code>geom_point()</code> geometric object is *inheriting* the information it needs from the <code>ggplot()</code> object. If we look at the our <code>ggplot()</code> code, we can see that we have already provided information about three things:

- 1. The dataset being used is mydata
- 2. The x-axis variable is total_bl_villavg
- 3. The y-axis variable is total_ely3_villavg

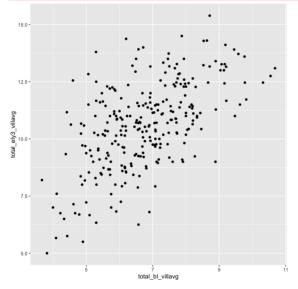
Turns out, this is all we need to produce the scatter graph. Of course this is made possible by the inherit.aes argument having a default value of TRUE. If you run the following code block, you will get an error:

```
ggplot(mydata, aes(x = total_bl_villavg, y = total_ely3_villavg)) + geom_point(inherit.aes = FALSE)
```

So what if we didn't pass any arguments in ggplot()? Well, we would need to pass them in geom point() like this:

```
In [9]: ggplot() +
    geom_point(aes(x = total_bl_villavg, y = total_ely3_villavg), mydata)
Warning message:
```

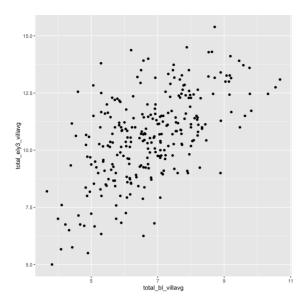
"Removed 5 rows containing missing values (geom_point)."



You might have noticed that we are writing the aes function before specifying the dataset. This is in line with how the parameters are ordered (see above). And yes, in case you are wondering, if we look at the we can pass in ggplot(), the data parameter comes before the mapping parameter:

```
ggplot(data = NULL, mapping = aes(), ..., environment = parent.frame())
```

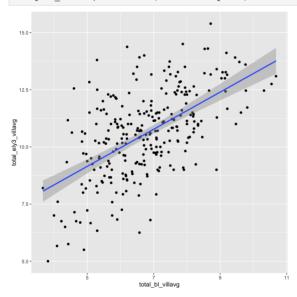
You can always manually specify which parameter you are referring to, and the order wont matter, as shown here:



Note the difference between parameters and arguments: **Function parameters** are the names listed in the function's definition. **Function arguments** are the real values passed to the function. Parameters are initialized to the values of the arguments supplied.

Now, you might be wondering, why bother *ever* passing arguments to the <code>ggplot()</code> object? The answer is efficiency. Let's see how.

Assume now that we want to add a fitted line as well. We would need to use the <code>geom_smooth()</code> object. As with the <code>geom_point()</code> object, we will add it as a layer. Let's also get rid of that warning message by setting the <code>na.rm</code> parameter as <code>TRUE</code> for both geometric objects.



Before we discuss the parameters that we have used, notice what we did not use. Since we have already specified the dataset along with the x and y axis aesthetic mapping in the base <code>ggplot()</code> object, we no longer have to pass the same information to any geometric objects we use after that. So if you have information which is going to be reused by several geometric objects, it is good practice to pass it inside the <code>ggplot()</code> object.

We have used two new parameters in the geom_smooth() object:

- 1. method allows us to specify what kind of model we want to run. Here we have entered \lambda m, which stands for a linear model.
- 2. formula allows us to specify the regression equation. Here the dependent variable is y and we have only one independent variable x.

Quick note on syntax: The $^+$ operator must appear at the end of the line. The following code will return an error: ```R ggplot(mydata, aes(x = total_bl_villavg, y = total_ely3_villavg)) + geom_point() + geom_smooth(method = Im, formula = y ~ x) ```

Customizing aesthetics

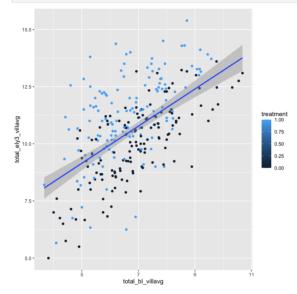
We have only scratched the surface of what the aes parameter can do. In ggplot, the aesthetic is a mapping between variable and a visual cue. Some of the common aesthetics we can control include:

- . Position (i.e., on the x and y axes)
- Color ("outside" color)
- Fill ("inside" color)
- Shape (of points)
- Line type
- Size

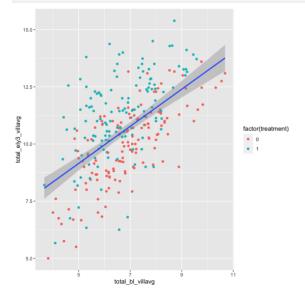
Let's add a few of the unused ones in our graph.

color

Can be used show which points belong to the treatment and control groups.

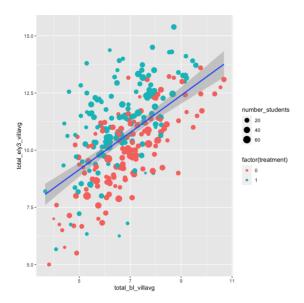


The points now have two colors, corresponding to their treatment status. However legend is presented as a continuous scale of colors, even though only two shades of blue are plotted (light and dark blue). This is happening because ggplot does not explicitly know that treatment status only has two values, 0 and 1. ggplot is handling the treatment variable as a continuous variable, where it could take *any* value between 0 and 1, such as 0.1, 0.78, 0.81 etc. We can ask ggplot to handle treatment as a discrete variable by using the factor() function.



size

Can be used to show the number of students.

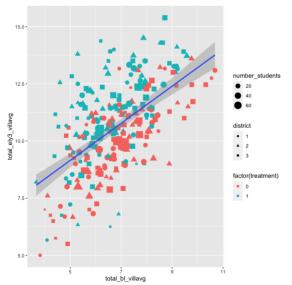


shape

Can be used to display information such as the district in which the village is located in. Our dataset currently does not have district information, so let's add it. Since the district variable is discrete, that is, a value of 1.2 does not make sense, we will include it as a factor.

```
In [15]: mydata$district <- factor(sample.int(3, nrow(mydata), replace = T))
head(mydata)</pre>
```

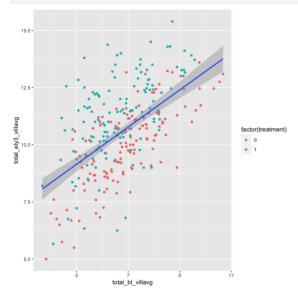
vil	lage_id_rand	treatment	total_bl_villavg	hindi_bl_villavg	math_bl_villavg	english_bl_villavg	total_ely1_villavg	hindi_ely1_villavg	math_ely1_vil
	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>	<1
	1	1	7.051282	2.641026	2.230769	2.179487	10.120000	4.120000	3.320
	2	0	7.269231	2.653846	2.615385	2.000000	10.142858	4.214286	3.35
	3	1	6.142857	2.142857	2.071429	1.928572	9.000000	3.500000	2.750
	4	1	7.480000	3.000000	2.320000	2.160000	11.600000	5.200000	3.466
	5	0	5.352941	2.000000	2.058824	1.294118	7.181818	2.909091	2.363
	6	0	8.266666	3.366667	2.600000	2.300000	12.235294	4.764706	3.823



We have created a graph which takes advantage of the following aesthetics:

- 1. Position
- 2. Color
- 3. Size
- 4. Shape

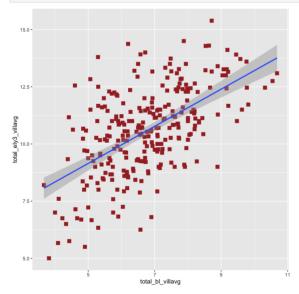
However, just because we can, doesn't mean that we should include each and every possible aesthetic. Inclusion and exclusion of aesthetic mappings should be dependent on what information we are trying to convey. In this example, it is probably most informative if we only keep the color aesthetic to show the split between treatment and control villages.



Visual modifications without aes

ggplot also allows us to modify how the data is plotting without mapping a variable to a particular aesthetic. For example, we can manually set the color, size and shape of the points.

```
In [18]:
    ggplot(mydata, aes(x = total_bl_villavg, y = total_ely3_villavg)) +
        geom_point(aes(color = factor(treatment)),
        color = "brown",
        size = 3,
        shape = "square",
        na.rm = TRUE
    ) +
    geom_smooth(method = lm, formula = y - x, na.rm = TRUE)
```



Note that the color specified through the aes mapping is suppressed if we manually set these arguments.

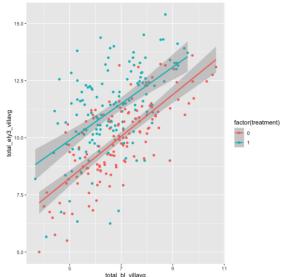
Common graph overlays

Some common graph overlays include:

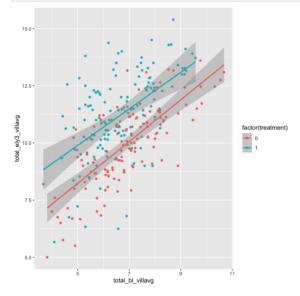
- 1. Fitted lines
- 2. Confidence intervals
- 3. Reference lines
- 4. Text

We have already added a fitted line and its corresponding CI envelope thanks to the <code>geom_smooth</code> object. But here are a few ways it can be modified:

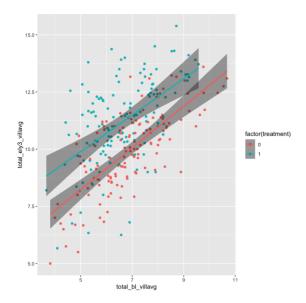
. Multiple fitted lines according to treatment status



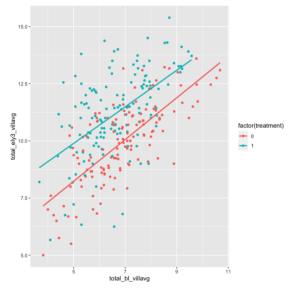
• Changing the level of the confidence interval (level; default is 95%)



 \bullet Changing the shade of the confidence interval ($\ensuremath{\,\text{fill}\,}$)

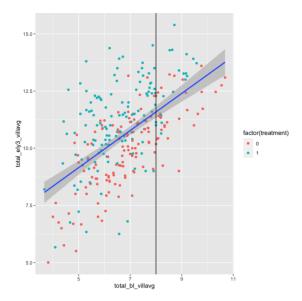


• Hiding the confidence interval (se)

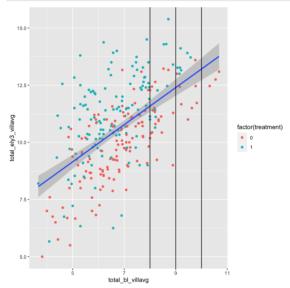


Reference lines

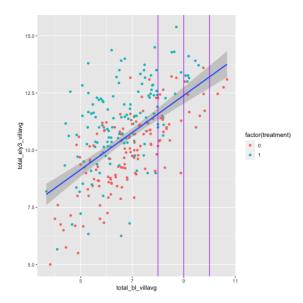
geom_vline for vertical lines



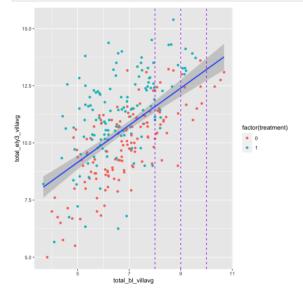
You can also add several lines at once:



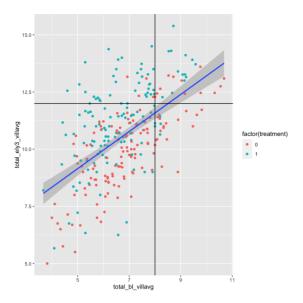
Change the color:



Change the line type:

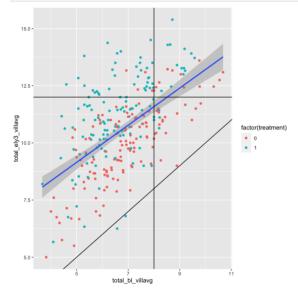


geom_hline for horizontal lines

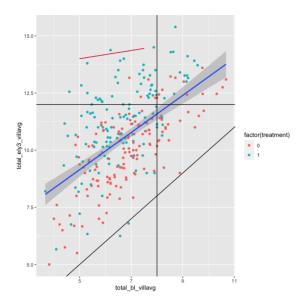


geom_abline for lines with slope and intercept

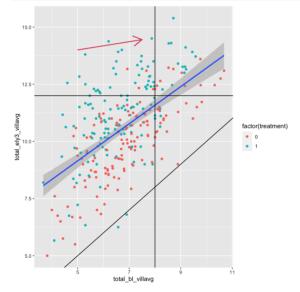
A 45° line has a slope of 1



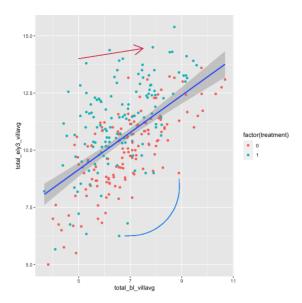
geom_segment for line segments



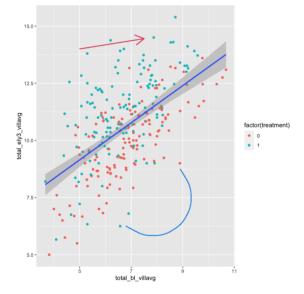
Use the arrow parameter if you want to add an arrow at the end of the line segment:



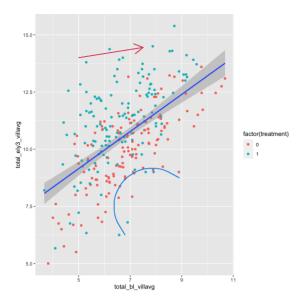
geom_curve for curves



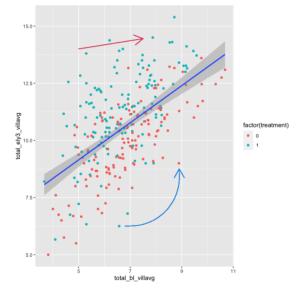
We can change the curvature using the curvature parameter. Positive values will produce a right-hand curve:



Negative values will produce a left-hand curve:



And similar to <code>geom_segment</code> , we can add an arrow using the <code>arrow</code> parameter:



Text

We can also add the slope and standard error on the plot region. However to achieve this, we will need to store the values in variables.

```
In [35]: model <- lm(total_ely3_villavg ~ total_bl_villavg, data = mydata)
model_summary <- summary(model)
model_summary

slope <- round(model_summary$coefficients[2, 1], 2)
se <- round(model_summary$coefficients[2, 2], 2)
print(paste0("The slope is ", slope, ", the SE is ", se))</pre>
```

```
Call:
          lm(formula = total ely3 villavg ~ total bl villavg, data = mydata)
          Residuals:
                         1Q Median
               Min
                                           3Q
          -4.1740 -1.0768 -0.0028 0.9537 4.4129
          Coefficients:
                              Estimate Std. Error t value Pr(>|t|)
                                           0.48166 10.57 <2e-16 ***
0.06992 11.61 <2e-16 ***
          (Intercept)
                               5.08910
          total_bl_villavg 0.81184
          Signif. codes: 0 '***' 0.001 '**' 0.01 '*' 0.05 '.' 0.1 ' ' 1
          Residual standard error: 1.553 on 275 degrees of freedom
             (5 observations deleted due to missingness)
          Multiple R-squared: 0.329,
                                               Adjusted R-squared: 0.3265
          F-statistic: 134.8 on 1 and 275 DF, p-value: < 2.2e-16
          [1] "The slope is 0.81, the SE is 0.07"
In [36]: ggplot(mydata, aes(x = total_bl_villavg, y = total_ely3_villavg)) +
               geom_point(aes(color = factor(treatment)), na.rm = TRUE) +
geom_smooth(method = lm, formula = y - x, na.rm = TRUE) +
               annotate(
                    geom = "label", x = 10, y = 15,
label = paste0("Slope: ", slope, "\n(", se, ")"),
                    size = 4.5
                                                 Slope: 0.81
(0.07)
          ely3_villavg
                                                             factor(treatment)
```

Storing and exporting graphs

total_bl_villavg

Let's revisit the first graph we created.

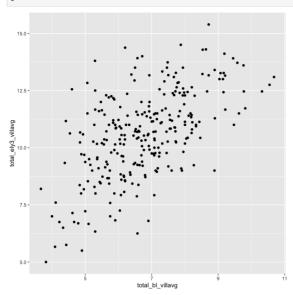
```
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```

We can store this graph in a named geometric object.

```
In [38]: plot1 <- ggplot(mydata, aes(x = total_bl_villavg, y = total_ely3_villavg)) +
    geom_point(na.rm = TRUE)</pre>
```

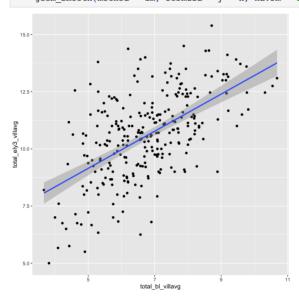
By doing so, we no longer need to run the code to display the graph again. We can simply refer to it using the name of the object we stored it in.

In [39]: plot1



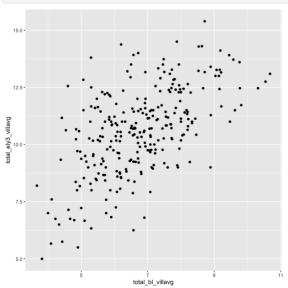
If we want to add layers, we can add them to plot1.

In [40]: plot1 +
 geom_smooth(method = lm, formula = y ~ x, na.rm = TRUE)

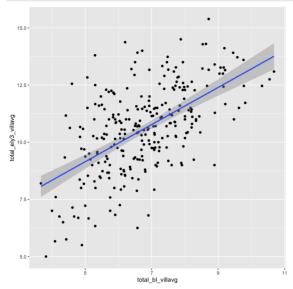


Important to note however that we haven't changed plot1 with the above command.

In [41]: plot1



If we want plot1 to include the geom_smooth layer, we will have to assign it.



We can export graphs using the ggsave command.

```
In [43]: ggsave("~/Dropbox (IDinsight)/Technical bootcamp online/Lessons/R/Data Visualization/Exports/plot1.png")
Saving 7 x 7 in image
```

By default ggsave saves the last plot was shown. If we have multiple plots and want to save a plot that was created previously, we will need to use the plot parameter and specify the plot name.

Credits

This lesson was inspired by content from the following:

- 1. Statistical tools for high-throughput data analysis
- 2. Graphics with ggplot2)