### Accelerated Lecture 6: Grouped Analysis

Harris Coding Camp

Summer 2022

Remember the world inequality data lab?

### First, you did the analysis for France

```
french_data <-
  wid data |>
    filter(type == "Net personal wealth",
           country == "France") |>
    mutate(perc_national_wealth = value * 100)
french data |>
  filter(percentile == "p90p100") |>
  filter(between(year, 1995, 2010)) |>
  summarize(wealth share of top 10 =
              mean(perc national wealth, na.rm=TRUE))
```

```
## # A tibble: 1 x 1
## wealth_share_of_top_10
## <dbl>
## 1 54.4
```

### Then, you did the analysis for Russia

```
russian_data <-
  wid data |>
    filter(type == "Net personal wealth",
           country == "Russian Federation") |>
    mutate(perc_national_wealth = value * 100)
russian_data |>
  filter(percentile == "p90p100") |>
  filter(between(year, 1995, 2010)) |>
  summarize(wealth share of top 10 =
              mean(perc national wealth, na.rm=TRUE))
```

```
## # A tibble: 1 x 1
## wealth_share_of_top_10
## <dbl>
## 1 63.3
```

Then, we asked you try for Korea ...

Could there be a way to work on each country's subset of data at the same time?

### group\_by() is the answer!

### group\_by() is the answer!

##	#	A tibble: 8 x 2	
##		country	wealth_share_of_top_10
##		<chr></chr>	<dbl></dbl>
##	1	China	50.4
##	2	France	54.4
##	3	India	55.6
##	4	Korea	63.7
##	5	Russian Federation	63.3
##	6	South Africa	85.4
##	7	United Kingdom	50.7
##	8	USA	67.9

### Analyzing data by groups

- 1. "Split" data into groups
- done silently with group\_by()
- 1. **Apply** a function to each group
- use summarize(), mutate() or any dplyr verb
- 1. Combine the results back into a tibble

### split - apply - combine

				city	particle size	amount (µg/m³)				
city	particle size	amount (µg/m³)		New York	large	23				
New York	large	23	1	New York	small	14				
N. W. I								mean	sum	n
New York	small	14		London	large	22	•	18.5	37	2
London	large	22		London	large	22		40.0	00	0
Landan	am all	10	<b>—</b>	London	small	16	-	19.0	38	2
London	small	16						88.5	177	2
Beijing	large	121								
Beijing	small	56	-	Beijing	large	121				
Deijing	Siriali	50		Beijing	small	56				

- summarize by group with group\_by() + summarize()
- create new columns with group\_by() + mutate()
- ► Appendix: filter() data with group specific matching criteria

### Ungrouped data ...

```
txhousing |> glimpse()
```

```
## Rows: 8,602
## Columns: 9
## $ city <chr> "Abilene", "Abile
## $ year <int> 2000, 2000, 2000, 2000, 2000, 2000, 2000
## $ month
                                                                    <int> 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
## $ sales
                                                                <dbl> 72, 98, 130, 98, 141, 156, 152, 131, 1
## $ volume <dbl> 5380000, 6505000, 9285000, 9730000, 10
## $ median <dbl> 71400, 58700, 58100, 68600, 67300, 669
## $ listings <dbl> 701, 746, 784, 785, 794, 780, 742, 769
## $ inventory <dbl> 6.3, 6.6, 6.8, 6.9, 6.8, 6.6, 6.2, 6.4
## $ date <dbl> 2000.000, 2000.083, 2000.167, 2000.250
```

### "split" the data with group\_by() (subtle)

- group by() adds some meta-data about groups
- otherwise, no difference

## Rows: 8,602 ## Columns: 9

## \$ date

```
group_by(txhousing, city) |> glimpse()
```

<dbl> 2000.000, 2000.083, 2000.167, 2000.250

### Let's make a tiny example

```
ex data <-
 tibble(period = rep(c(1, 2), 2),
        group_col = c("a", "a", "b", "b"),
        x = c(10, 6, 7, 7))
str(ex data)
## tibble [4 x 3] (S3: tbl df/tbl/data.frame)
   $ period : num [1:4] 1 2 1 2
##
## $ group_col: chr [1:4] "a" "a" "b" "b"
## $ x : num [1:4] 10 6 7 7
```

# create a hidden tibble that lists the .rows that belong to each group

```
grouped ex data <-
 group_by(ex_data, group_col)
str(grouped ex data)
## grouped_df [4 x 3] (S3: grouped_df/tbl_df/tbl/data.frame
   $ period : num [1:4] 1 2 1 2
##
   $ group_col: chr [1:4] "a" "a" "b" "b"
##
## $ x : num [1:4] 10 6 7 7
   - attr(*, "groups") = tibble [2 x 2] (S3: tbl df/tbl/da
##
     ..$ group_col: chr [1:2] "a" "b"
##
##
     ..$ .rows : list<int> [1:2]
     ....$ : int [1:2] 1 2
##
     ....$ : int [1:2] 3 4
##
     .. .. @ ptype: int(0)
##
     ..- attr(*, ".drop")= logi TRUE
##
```

### Start with upgrouped summary statistics

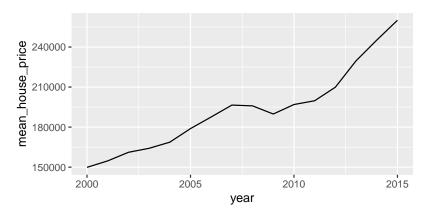
- summarize() collapses data to one row
- ▶ The count function n() takes no arguments and returns the size of a group

#### apply and combine summarize()

now summarize() collapses a data to one row for each group

```
## # A tibble: 3 x 5
## year group_n total_sales total_volume mean_house_price
## <int> <int> <dbl> <dbl> <dbl> <dbl> 
## 1 2000 552 222483 33342410971 149865.
## 2 2001 552 231453 35804815138 154696.
## 3 2002 552 234600 37798888462 161121.
```

### Visualizing our summarized data with ggplot



### What if we want the same trend by city?

We can filter the data and then split-apply-combine

```
## # A tibble: 3 x 5
     year group_n total_sales total_volume mean_house_price
##
    <int>
            <int>
                       <dbl>
                                    <dbl>
                                                   <dbl>
##
## 1
     2000
              12
                       52459 8041166317
                                                  153285.
## 2 2001
              12
                       53856 8541022943
                                                  158590.
## 3 2002
              12
                       56563
                               9486396667
                                                  167714.
```

# What if we want annual data for every Texas city?

### We can group by multiple columns!

## Groups: city, year [736]

We now have 46 cities  $\times$  16 years = 736 groups!

```
group_by(txhousing, city, year) |> glimpse()

## Rows: 8,602
## Columns: 9
```

## \$ inventory <dbl> 6.3, 6.6, 6.8, 6.9, 6.8, 6.6, 6.2, 6.4 ## \$ date <dbl> 2000.000, 2000.083, 2000.167, 2000.250

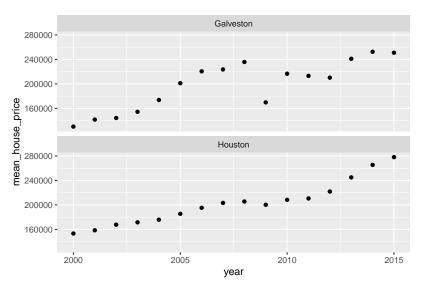
#### Voilà

```
## # A tibble: 5 x 5
## # Groups: city [1]
##
    city year total_sales total_volume mean_house_price
    <chr> <int>
                       dbl>
                                   <dbl>
                                                  <dbl>
##
## 1 Abilene 2000
                       1375 108575000
                                                 78964.
## 2 Abilene 2001
                       1431 114365000
                                                 79920.
## 3 Abilene 2002
                       1516 118675000
                                                 78282.
## 4 Abilene 2003
                     1632 135675000
                                                 83134.
## 5 Abilene 2004
                       1830
                               159670000
                                                 87251.
```

## How have Texas housing prices changed over time in certain cities?

```
annual_city_housing_prices |>
  filter(city %in% c("Houston", "Galveston")) |>
  ggplot(aes(x = year, y = mean_house_price)) +
    geom_point() +
  facet_wrap(facets = "city", nrow = 2)
```

## How have Texas housing prices changed over time in certain cities?



### Grouping + Summarizing: Base R vs Tidyverse

Tidyverse:

#### Base R:

### Ungrouping data

```
class(txhousing)
## [1] "tbl df" "tbl"
                               "data.frame"
txhousing_grouped <- group_by(txhousing, year)</pre>
class(txhousing_grouped)
## [1] "grouped_df" "tbl_df"
                                            "data.frame"
                               "tbl"
To get rid of groups, use ungroup()
txhousing_grouped |> ungroup() |> class()
## [1] "tbl_df" "tbl"
                               "data.frame"
```

### What's going on here?

```
txhousing_grouped |>
  select(-c(year, month, date, inventory)) |>
  head()
```

```
## # A tibble: 6 x 6
  # Groups: year [1]
##
     year city sales volume median listings
##
    <int> <chr> <dbl>
                        <dbl> <dbl>
                                      <dbl>
                  72 5380000 71400
                                       701
## 1 2000 Abilene
  2 2000 Abilene
                  98
                      6505000 58700
                                       746
##
## 3 2000 Abilene 130
                      9285000 58100
                                       784
##
  4 2000 Abilene 98
                      9730000 68600
                                       785
## 5 2000 Abilene 141 10590000 67300
                                       794
## 6
     2000 Abilene 156 13910000 66900
                                       780
```

### grouped data require the grouping variable

We got the message:

Adding missing grouping variables: 'year'

```
txhousing_grouped |>
  ungroup() |>
  select(-c(year, month, date, inventory)) |>
  head()
```

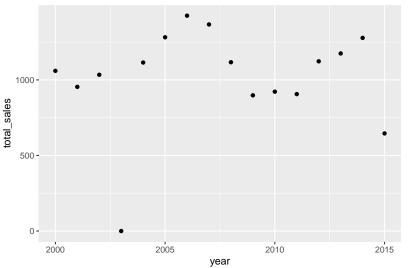
```
## # A tibble: 6 x 5
    city sales volume median listings
##
## <chr> <dbl> <dbl> <dbl>
                               <dbl>
## 1 Abilene 72 5380000 71400
                                 701
  2 Abilene 98 6505000
                        58700
                                 746
## 3 Abilene 130 9285000
                        58100
                                 784
## 4 Abilene 98 9730000
                                 785
                        68600
## 5 Abilene 141 10590000
                        67300
                                 794
## 6 Abilene 156 13910000
                        66900
                                 780
```

### Try it yourself

#### txhousing loads with the tidyverse

- 1. Filter observations where city is "Brazoria County"
- 2. Next, determine total sales in each year
- 3. Plot the total sales over time
- 4. Create two variables to show the number of missing & non-missing obs for sales in Brazoria County.

### What happened in 2003?



- Whenever you aggregate data, pay attention to NAs
- count missing values sum(is.na(x)) or non-missing values sum(!is.na(x))

# How do we get the summarized values back into the main dataset?

### apply and combine mutate()

```
ex data |>
 group_by(group_col) |>
 mutate(group mean = mean(x))
## # A tibble: 4 x 4
## # Groups: group_col [2]
## period group_col x group_mean
## <dbl> <chr> <dbl> <dbl> <dbl>
## 1 1 a
                      10
                                 8
## 2 2 a
                       6
                                 8
## 3 1 b
## 4 2 b
```

# How would you calculate the change in sales from year to year?

### Say your prof gives you the code ...

```
txhousing |>
 group_by(city, year) |>
 summarize(sales = sum(sales, na.rm = TRUE)) |>
 group_by(city) |>
 mutate(diff_sales = sales - lag(sales)) |>
head()
## # A tibble: 6 \times 4
## # Groups: city [1]
    city year sales diff_sales
##
## <chr> <int> <dbl>
                           <dbl>
## 1 Abilene 2000 1375
                              NΑ
## 2 Abilene 2001 1431
                              56
## 3 Abilene 2002 1516
                              85
## 4 Abilene 2003 1632 116
## 5 Abilene 2004 1830
                             198
## 6 Abilene 2005 1977
                             147
```

#### Let's make sense of the code

- 1. Why do we need group\_by()?
- 2. What is lag() and how does it work?

```
txhousing |>
  group_by(city, year) |>
  summarize(sales = sum(sales, na.rm = TRUE)) |>
  # new material ...
  group_by(city) |>
  mutate(diff_sales = sales - lag(sales))
```

### What is lag() and how does it work?

Consider the time series x.

## # A tibble: 6 x 5

► Think of each row with x as the "present"

```
tibble(
   time = 1:6,
   x = c(4,2,4,1,6,8),  # the time series
   lag(x),  # x past (1 row)
   lag(x, 2), # x past (2 rows)
   lead(x))  # x future
```

```
## time x 'lag(x)' 'lag(x, 2)' 'lead(x)'
## <int> <dbl> <dbl> <dbl> <dbl> 
## 1 1 4 NA NA NA 2

## 2 2 2 2 4 NA 4

## 3 3 4 2 4 1

## 4 4 1 4 1 4 2 6

## 5 5 6 1 4 8
```

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#### If the timeseries is out of order . . .

lag() and lead() still work, but not how you want

```
tibble(time = c(2, 3, 5, 1, 4, 6),
    x = c(4,2,4,1,6,8),
    lag(x), # I take x shift it "down" ...
lead(x)) # I take x shift it "up" ...
```

```
## # A tibble: 6 x 4
## time x 'lag(x)' 'lead(x)'
## <dbl> <dbl> <dbl>
                     <dbl>
## 1 2 4
                NA
## 2 3 2
## 3 5 4
## 4 1 1
## 5 4 6
                1
                        8
   6
          8
                       NΑ
## 6
```

# regardless of what x is.

# ... put it back in order with arrange()

```
## # A tibble: 6 x 4
    time x 'lag(x)' 'lead(x)'
##
## <dbl> <dbl> <dbl>
                      <dbl>
## 1
                 NA
      1
## 2 2 4
## 3
      3
## 4 4 6
## 5 5 4
                         8
      6
           8
## 6
                        NA
```

# Why do we need group\_by()?

We want to learn about growth from period 1 to period 2

▶ What goes wrong?

# split-apply-combine to get differences

## Grouped mutate: other window functions

➤ See the "Data transformation with dplyr" cheatsheet (page 2) for more vectorized window functions.

```
## # A tibble: 4 x 5
## # Groups: group_col [2]
##
    period group col x cumulative centered
     <dbl> <chr> <dbl>
##
                           <dbl>
                                    <dbl>
                     10
                               10
## 1
        1 a
                               16
## 2 2 a
                      6
                                      -2
## 3 1 b
     2 b
                               14
## 4
```

# Grouped mutate: ranking

```
ex_data |> mutate(rank = row_number(x))
## # A tibble: 4 x 4
## period group_col x rank
## <dbl> <chr> <dbl> <int>
## 1 1 a
                     10
## 2 2 a
## 3 1 b
## 4 2 b
                           3
ex_data |> group_by(group_col) |> mutate(rank = row_number(x))
## # A tibble: 4 x 4
## # Groups: group_col [2]
## period group_col x rank
## <dbl> <chr> <dbl> <int>
## 1
    1 a
                     10
## 2 2 a
                    6
## 3 1 b
## 4 2 b
```

# Grouped mutate: You want to rank sales within group.

► (Try running the code without group\_by() and carefully compare the results.)

```
ranked_data <-
txhousing |>
  group_by(year, city) |>
  summarize(total_sales = sum(sales, na.rm = TRUE)) |>
  group_by(year) |>
  mutate(sales_rank = rank(desc(total_sales)))
```

# Grouped mutate: You want to rank sales within group.<sup>1</sup>

ranked\_data |> arrange(year, sales\_rank) |> head(10)

```
## # A tibble: 10 \times 4
   # Groups: year [1]
##
##
                               total_sales sales_rank
       year city
##
      <int> <chr>
                                      <dbl>
                                                 <dbl>
##
    1 2000 Houston
                                      52459
##
    2 2000 Dallas
                                     45446
##
    3
       2000 Austin
                                      18621
##
       2000 San Antonio
                                      15590
##
    5
       2000 Collin County
                                     10000
       2000 Fort Bend
                                                     6
##
                                      7254
       2000 NE Tarrant County
                                      7169
##
##
       2000 Fort Worth
                                      6380
                                      6149
##
       2000 Denton County
##
   10
       2000 El Paso
                                      5109
                                                    10
```

<sup>&</sup>lt;sup>1</sup>R has a variety of related functions see ?ranking

# You want to work with the top 5 cities for each year.

```
ranked_data |>
    # we already added ranks!
filter(sales_rank <= 5) |>
arrange(year, sales_rank) |>
head()
```

```
## # Groups: year [2]
## year city
                      total sales sales rank
## <int> <chr>
                            <dbl>
                                     <dbl>
## 1 2000 Houston
                            52459
## 2 2000 Dallas
                            45446
## 3 2000 Austin
                            18621
## 4 2000 San Antonio
                           15590
                                         5
## 5 2000 Collin County
                           10000
## 6 2001 Houston
                            53856
```

## # A tibble: 6 x 4

Wrapping up commonly used chunks of code

# We often want to know how many observations (rows) are in groups . . .

```
midwest |>
  count(state, inmetro) |>
  head()
```

```
## # A tibble: 6 x 3
##
     state inmetro
                       n
##
     <chr> <int> <int>
## 1 IL
                 0
                      74
## 2 IL
                      28
## 3 IN
                 0
                      55
                      37
## 4 IN
## 5 MI
                      58
                      25
## 6 MI
```

# How would you get the same output with group\_by()?

```
## # A tibble: 6 x 3
##
     state inmetro
                        n
##
     <chr>
           <int> <int>
                       74
## 1 IL
                  0
## 2 IL
                       28
                  0
                       55
## 3 IN
                       37
## 4 IN
## 5 MI
                 0
                       58
## 6 MI
                  1
                       25
```

# How does count() work?

```
midwest |>
  group_by(state, inmetro) |>
  summarize(n = n()) |>
  ungroup() |>
  head(5)
```

# add\_count() is a useful short cut

Can you tell what add\_count() does?

```
txhousing |>
  select(city, year, sales) |>
  add_count(city, year) |>
  head(5)
```

```
## # A tibble: 5 x 4
## city year sales n
## <chr> <int> <dbl> <int>
## 1 Abilene 2000 72 12
## 2 Abilene 2000 98 12
## 3 Abilene 2000 130 12
## 4 Abilene 2000 98 12
## 5 Abilene 2000 141 12
```

# How does add\_count() work?

```
txhousing |>
  select(city, year, sales) |>
  group_by(city, year) |>
  mutate(n = n()) |>
  ungroup() |>
  head(5)
```

```
## # A tibble: 5 x 4
## city year sales n
## <chr> <int> <dbl> <int>
## 1 Abilene 2000 72 12
## 2 Abilene 2000 98 12
## 3 Abilene 2000 130 12
## 4 Abilene 2000 98 12
## 5 Abilene 2000 141 12
```

### Try it yourself: Setup

midwest is a data set that comes bundled with tidyverse.

▶ *Old way*: let's calculate the total population of Ohio in the following way:

```
midwest |> filter(state == "OH") |>
summarize(total_population = sum(poptotal))
```

```
## # A tibble: 1 x 1
## total_population
## <int>
## 1 10847115
```

New way: With group\_by, we calculate the total population of all the states at once!

```
midwest |> group_by(state) |>
summarize(total_population = sum(poptotal))
```

# Try it yourself: group\_by()

- For each state in the midwest data, calculate the proportion of counties that are in a metro area (inmetro).<sup>2</sup>
- 2. Add a col to midwest called pop\_state that equals the state population.
- 3. Reproduce this table using count().

4. For each county, determine how far the poverty rate (percbelowpoverty) is from the state average. Pull out data for Cook and Will counties.

```
## # A tibble: 2 x 4
## # Groups: state [1]
##
     county state state_poverty_rate county_diff
##
     <chr> <chr>
                                <dbl>
                                            <dbl>
            IL
                                 13.1
                                             1.12
## 1 COOK
## 2 WTI.I.
          IL
                                 13.1
                                            -7.04
```

 $<sup>^{2}</sup>$ Recall that mean() of a column of 0 and 1s tell you the proportion of 1s.

# Recap: Analysis by group with dplyr

We learned the concept **split-apply-combine** and how to use it in tidyverse!

- summarize data by group with group\_by() + summarize()
- created new columns with group\_by() + mutate()
  - we saw lag() and rank(), but you could get also add group-level stats like mean() and median()
- use count() and add\_count() as short cuts for getting group level counts

## Next steps:

#### Lab:

► Today: Grouped analysis

I can streamline analysis of subgroup data using group\_by() and dplyr verbs

#### Lecture:

► Tomorrow: Writing your own functions!

# Appendix

# split-apply-combine filter:

▶ we don't need sales\_rank to filter by ranks!

```
txhousing |>
  group_by(year, city) |>
  summarize(total_sales = sum(sales, na.rm = TRUE)) |>
  group_by(year) |>
  # we don't need sales_rank to filter by ranks!
  filter(rank(desc(total_sales)) <= 5) |>
  arrange(year, desc(total_sales)) |>
  head()
```

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# Grouped arrange?

arrange() doesn't work on groups by default.

has default argument .by\_group = FALSE

```
ex_data |>
  group_by(group_col) |>
  arrange(x)
```

# Aside: Grouped arrange

```
Set .by_group = TRUE
```

```
ex_data |>
  group_by(group_col) |>
  # this option is nice if you have many grouping cols
  arrange(x, .by_group = TRUE)
```

Same idea as ....