

Intro to Programming with R for Political Scientists

Session 3: Data Wrangling

Markus Freitag Geschwister Scholl Institute of Political Science, LMU



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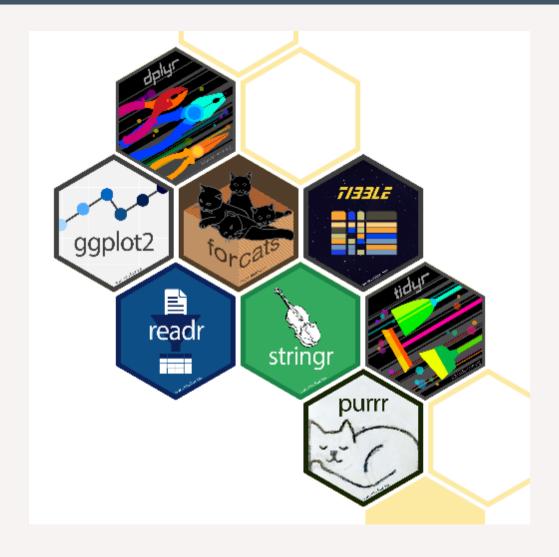
Overview

- 1. Intro
- 2. R-Studio and (Git)Hub
- 3. Base R & Tidyverse Basics
- 4. Data Wrangling
- 5. Data Viz
- 6. Writing Functions
- 7. A complete scientific workflow with R

Workflow

- Navigate to Session Scripts > Session 3 and open Session_3_script.R.
- You will see a pre-formatted Script with all the steps I do on the slides.
- Explore as you follow.
- If you have a second monitor, great! If not, split your screen.

Tidyverse Packages



• These are only the tidyverse packages loaded by default. There are **more** (e.g. **lubridate**).

The Philosophy: Tidy Data

- 1. Each variable forms a column.
- 2. Each observation forms a row.
- 3. Each type of observational unit forms a table. (Wickham 2014)
- Sounds pretty reasonable. 3. is related to constructing clean relational data bases (we will see an example later).
- However, we can relax this from time to time given our needs/statistical methods.

Messy data is everything else, e.g.:

```
race character gender age 0-100 age 100-500 age 500-100 age >1000
###
## 1 hobbits
                 Frodo
                         male
                         male
## 2 hobbits
                   Sam
     elves
                Arwen female
## 4 hobbits
                 Golum male
                                                                          (\cdot)
## 5 dwarves
                 Gimli
                         male
## 6
                 Eowyn female
         men
```

The Philosophy: Tidy Data

Tidy:

```
race character gender age_cat
###
## 1 hobbits
               Frodo
                      male
                             0-100
  2 hobbits
                     male
                            0-100
                 Sam
            Arwen female
## 3
      elves
                            >1000
## 4 hobbits
            Golum male 500-100
## 5 dwarves
            Gimli male 100-500
## 6
               Eowyn female
                             0-100
        men
```

Tibbles

- Tibbles are data.frames but with some perks. For instance, subset more strictly.
- They also print differently (better):

```
as_tibble(lotr)
```

```
### # A tibble: 6 x 4

### race character gender age_cat

### cchr> cchr> cchr> cchr>

### 1 hobbits Frodo male 0-100

### 2 hobbits Sam male 0-100

### 3 elves Arwen female >1000

### 4 hobbits Golum male 500-100

### 5 dwarves Gimli male 100-500

### 6 men Eowyn female 0-100
```

Hint: You can create one just like data frames but with tibble().

Importing/Exporting Data

- R comes with it's own two file formats, .rds (single objects) and .rda (multiple objects/tabular data).
- However, for saving the latter you will (and should) use .csv or .json (human readable) most of the time.
- For R novices, importing and exporting can be a bit of a pain.
 - There are different functions/packages for reading different file formats (haven, data.table, readxl etc.).
- Thankfully, the **rio** package by Thomas Leeper and Chung-hong Chan et al. makes our life easier.
- Provides export() and import as wrappers fot the above mentioned packages.

```
install.packages("rio")
```

Importing/Exporting Data

```
library(rio)
# Export
export(mtcars, "mtcars.csv") # R's built-in mtcars data-set.
export(mtcars, "mtcars.rds") # R serialized
export(mtcars, "mtcars.dta") # Stata
export(mtcars, "mtcars.json")
# Import
W <- import("mtcars.csv")</pre>
X <- import("mtcars.rds")</pre>
Y <- import("mtcars.dta")</pre>
Z <- import("mtcars.json")</pre>
```

Importing/Exporting Data

```
# Exporting/importing several data frames: export list()/import list()
# Make a list of two built-in data sets.
# tibble::lst() automatically names the elements:
df list <- tibble::lst(mtcars, iris)</pre>
export list(df list, file = paste0(names(df list), ".csv"))
# export_file takes a character vector; hence, we build one from the names of our element
# With the pasteO() we paste ".csv" to every element of the character vector
# produced by names(df list).
Z <- import list(dir(pattern = "csv$"))</pre>
# import_file takes achr vector holding file paths/files.
# With dir() we get all names of the files that match a specific pattern (regular expression).
# In this case, all files that end with csv ($ matches the end of the string).[1]
```

^[1] **Fine Point: Regular expressions** were developed in computer science to specify search patterns/make character matching possible. They are very useful (e.g. for manipulating/cleaning textual data) but pretty hard to memorize. Even if you know the basics, you will google alot. In R, I recommend the **stringi/stringr** packages.

Pipes: %>% and |>

- Pipes are crucial to the tidyverse workflow but also in general.
- They make code more readable.

Idea: Take the output of a function and to pass it as the first argument of another function.

```
f(g(x)) becomes (in R) x %>%<sup>[2]</sup> g() %>% f()
```

```
x <- c(1, 2, 3, 4)
sqrt(mean(x))
x %>%
  mean() %>%
  sqrt()
```

^[2] TIPP: Press ctrl-shift-m to produce the magrittr pipe, %>%, in RStudio.

Pipes: %>% and |>

- We can also pass the output as the second, third, ... argument using . as a placeholder.
- f(a, b = c) can be written as c % % f(a, b = .)

Example:

```
"Ceci n%est pas une pipe" %>% gsub("%", "'", .) # gsub() performs replacement of all ## [1] "Ceci n'est pas une pipe"
```

• They are so useful, the R core team even introduced a base pipe (|>), in May 2021. Something like this happen **very** rarely:

```
x |>
  mean() |>
  sqrt()
```

Pipes: %>% and |>

- The base pipe is a **tiny** bit faster.
- Does not need an extra dependency. Useful for package development (using the magrittr pipe in packages can be annoying sometimes).
- BUT: it does not (yet) properly support the . placeholder (as of June 2021).

We can hack it tho:

```
Sys.setenv("_R_USE_PIPEBIND_" = "true")
"Ceci n%est pas une pipe" |> . => gsub("%", "'", .)
```

```
## [1] "Ceci n'est pas une pipe"
```

• That's pretty ugly and apparently still buggy. We will stick to %>%.

Let's Wrangle

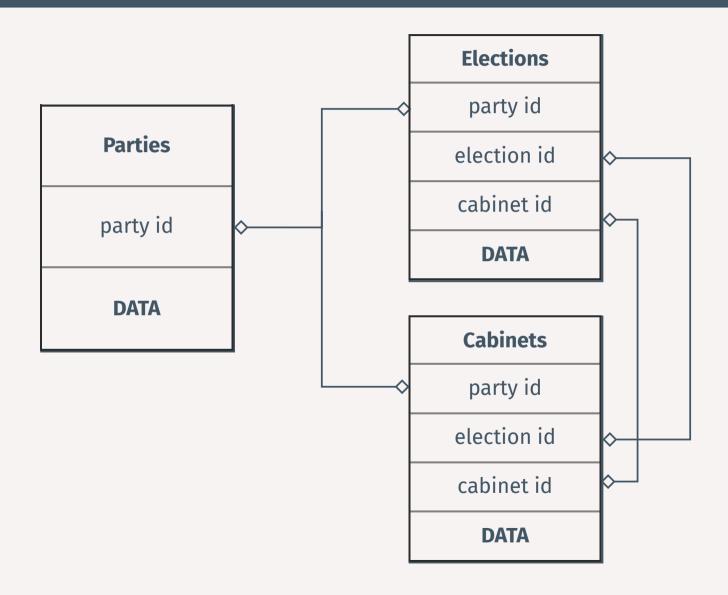
The Data

• We will use the **parlgov** database:

ParlGov is a data infrastructure for political science and contains information for all EU and most OECD democracies (37 countries). The database combines approximately 1700 parties, 1000 elections (9400 results), and 1600 cabinets (3900 parties).

• It's relational, i.e. consists of different tables (parties, elections, cabinets) that can be **joined** using key variables. It can also be joined with the **partyfacts** dataset that provides id's for many other datasets (e.g. CLEA, ESS).

The Data



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- It makes for pretty simple examples and hence we use it.

Let's import the election data:

```
parlgov_elec <- import("http://www.parlgov.org/static/data/development-cp1252/view_election.</pre>
```

The Data: Getting an Overview

glimpse(parlgov_elec) # enhanced version of str()

```
## Rows: 8,665
## Columns: 16
## $ country name short
                                   <chr> "AUS", "AUS", "AUS", "AUS", "AUS", "AU~
## $ country name
                                   <chr> "Australia", "Australia", "Australia",~
## $ election type
                                   <chr> "parliament", "parliament", "parliamen~
## $ election date
                                   <date> 1901-03-30, 1901-03-30, 1901-03-30, 1~
## $ vote share
                                   <dbl> 44.4, 34.2, 19.4, 1.4, 0.6, 29.7, 34.4~
## $ seats
                                   <int> 32, 26, 15, 1, 1, 26, 25, 23, 1, 0, 27~
                                   <int> 75, 75, 75, 75, 75, 75, 75, 75, 75, 75~
## $ seats total
## $ party name short
                                   <chr> "PP", "FTP", "ALP", "none", "one-seat"~
## $ party name
                                   <chr> "Protectionist Party", "Free Trade Par~
## $ party name english
                                   <chr> "Protectionist Party", "Free Trade Par~
## $ left right
                                   <dbl> 7.4000, 6.0000, 3.8833, NA, NA, 7.4000~
## $ country id
                                   ## $ election id
                                   <int> 731, 731, 731, 731, 731, 730, 730, 730~
## $ previous parliament election id <int> NA, NA, NA, NA, NA, 731, 731, 731, 731~
## $ previous cabinet id
                             <int> NA, NA, NA, NA, NA, 997, 997, 997~
## $ party id
                                   <int> 1898, 1938, 1253, 1396, 2299, 1898, 19~
```

The Data: Getting an Overview

Sho	ow 3 • entries	Search:				
	country_name_short •	country_name 🎙	election_type *	election_date *	vote_share = se	
1	AUS	Australia	parliament	1901-03-30	44.4	
2	AUS	Australia	parliament	1901-03-30	34.2	
3	AUS	Australia	parliament	1901-03-30	19.4	
Sho	owing 1 to 3 of 10 entries		Previous	1 2 3	4 Next	

Q: Is this data set tidy?

The Data: Getting an Overview

datasummary_skim(parlgov_elec) # from modelsummary package. Set type = "categorical" for character vars.
Of course, not super informative in our hierarchical data set:

	Unique (#)	Missing (%)	Mean	SD	Min	Median	Max	
vote_share	2459	6	11.9	12.9	0.0	6.6	71.2	L
seats	291	1	23.3	45.7	0.0	6.0	470.0	L
seats_total	209	0	212.2	181.3	5.0	151.0	709.0	4
left_right	413	10	5.1	2.4	0.0	5.7	9.8	
country_id	37	0	37.2	20.5	1.0	37.0	75.0	TELE
election_id	998	0	569.5	320.2	1.0	583.0	1094.0	
previous_parliament_election_id	794	3	543.0	301.5	1.0	563.0	1079.0	
previous_cabinet_id	833	3	752.0	468.0	2.0	734.0	1634.0	
party_id	1559	0	1120.3	738.8	2.0	1015.0	2812.0	

TIPP: The **collapse** package also provides some data summary functions (descr() and qsu()) that work really well on huge data sets. Stata users will love it as its similar to summarize.

Tidyverse's Wrangling "Wunderkind": dplyr



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A full list of dplyr functions can be found here.

Data Masking

- Before we jump right in, remember when we talked about R environments in the last session?
- When we wanted to pass a variable of a data frame (or element of a list) to a function, we needed to make that **explicit**, e.g., using \$ for subsetting.

```
lm(df\$y \sim df\$x)
```

- Some important dplyr functions use **data masking** such that you can refer to variables just like objects in the (global) envornment.
- Get's rid of \$s.

Filtering Rows

- Let's start with something very basic: filtering rows.
- For instance, we might want to obtain only the results of all Bundestag elections:

```
parlgov_elec_de <- parlgov_elec %>% # add, e.g., _de if we want to keep our original df
filter(country_name_short == "DEU")
```

• Now, say we want the mean SPD vote share across all bundestag elections (bit silly but alas):

```
datasummary_skim(parlgov_elec_de$election_type, type = "categorical")

parlgov_elec_de %>% # add, e.g., _de if we want to keep our original df
  filter(party_name_short == "SPD", election_type == "parliament") %>%
  mean(vote_share)
```

That does not work...Q: Why?

Note that using convenience wrappers such as datasummary() are no substitute for learning the underlying base, tidyverse or data.table-way of achieving this.

summarise() and pull()

• Base-R's summary stats functions can't take a df or tibble and we did not wrap it into a dplyr function (in order for data masking to kick in).

Two options:

1. We can use pull() to pull out a vector form a df; works like \$ but for pipes.

```
parlgov_elec_de %>% # add, e.g., _de if we
  filter(party_name_short == "SPD", electic
  pull(vote_share) %>%
  mean()
```

```
## [1] 31.70964
```

2. We can wrap mean() into summarise() ("data-masking" for built-in summary functions):

```
parlgov_elec_de %>%
  filter(party_name_short == "SPD", electic
  summarise(mean(vote_share)) # summarise()
```

```
## mean(vote_share)
## 1 31.70964
```

summarise()

- Puts out a tibble we can pass to other dplyr functions.
- We can also compute more summary statistics with summarise() AND also turn them into variables:

• In that, it is somewhat similar to the mutate() command... but it collapses the data.

mutate()

- With mutate() you can add columns or overwrite existing ones (with the same name) based on transformations of other variables
- For instance, say we want to add a new column "year" based on the election date variable:

```
parlgov_elec_de <- parlgov_elec_de %>% # here, we "overwrite" our df
mutate(year = lubridate::year(election_date))
```

- Here, we used the year() function of the lubridate package.
- We pulled out an integer vector indicating the election year from the date variable and assigned it to a new variable.^[3]
- transmute() is the opposite of mutate(); i.e. adds a new variable and drops the rest.

^[3] **NOTE** We will use some core lubridate functions on the fly as they are rather intuitive. If you deal with dates often, give **this** intro a read.

select() and arrange()

- Another basic wrangling operation we occasionally need to do do is selecting columns.
- And sometimes we also want to sort columns:

```
parlgov_elec_de %>%
  filter(year == 2017) %>%
  select(party_name_short, vote_share, left_right) %>%
  arrange(desc(left_right)) #default is ascending; we can wrap the masked vector with desc() to sort desc
```

```
4F4F
     party_name_short vote_share left_right
## 1
                  AfD
                            12.6
                                     8.8000
## 2
                             1.0
                                     7.4000
                  FW
## 3
                  CSU
                             6.2
                                    7.2871
## 4
                  CDU
                            26.8
                                     6.2503
## 5
                 FDP
                            10.7
                                     5.9233
## 6
                            20.5
                  SPD
                                     3.6451
## 7
             B90/Gru
                             8.9
                                     2.9308
## 8
               PDS|Li
                             9.2
                                     1.2152
## 9
               PARTET
                             1.0
                                         NA
```

- The last of the most fundamental dplyr "verbs" we will learn is <code>group_by</code>.
- Given the variables you supply, it converts a data frame into a grouped version of it such that you can do transformations, call functions, manipulate variables, etc.
- For instance, let's use the whole data to get the party with the most votes ever in a parliamentary election by country...

10 GBR

... with 27 more rows

```
parlgov elec %>%
  filter(election type == "parliament") %>%
  group by(country name short) %>%
  summarise(share max = max(vote share, na.rm = T),
            party = party name english[1],
            election date = election date[1]
            ) %>% # note the "collapsing" I mentioned earlier
  arrange(desc(share max))
## # A tibble: 37 x 4
4|=4|=
     country name short share max party
                                                            election date
                            <dbl> <chr>
                                                            <date>
4|=4|=
     <chr>
## 1 CYP
                             71.2 Democratic Party
                                                           1976-09-05
                             68.2 Popular Front of Latvia 1990-04-29
## 2 I V A
                             66.3 Democratic Party
                                                            1990-05-20
## 3 ROU
## 4 MLT
                             59.9 Malta Labour Party
                                                            1947-10-27
## 5 JPN
                                  Japan Liberal Party
                                                            1946-04-10
                             59
### 6 NZL
                             58.7 New Zealand Liberal Party 1902-11-25
                                  Liberal Party of Canada
                                                            1900-11-07
### 7 CAN
## 8 CHE
                             56.2 Radical Democratic Party 1902-10-26
                             56 Catholic Party
## 9 BFI
                                                            1900-05-27
```

1918-12-14

55.0 Conservatives

- Too complex?
- Ok, let's do something more simple and add a variable that tells us the maximum number of total seats for each country.

```
parlgov_elec <- parlgov_elec %>%
  group_by(country_id) %>%
  mutate(max_seats = max(seats_total)) %>%
  ungroup() # to remove the grouping
```

```
parlgov elec %>%
  filter(seats total == max seats) %>%
  select(country name short, election date, max seats) %>%
  distinct() # select distinct rows
## # A tibble: 309 x 3
     country_name_short election_date max_seats
##
     <chr>
                        <date>
                                          <int>
4|=4|=
## 1 AUS
                        2019-05-18
                                            151
## 2 AUT
                        1920-10-17
                                            183
## 3 AUT
                        1971-10-10
                                            183
## 4 AUT
                        1975-10-05
                                            183
## 5 AUT
                        1979-05-06
                                            183
## 6 AUT
                        1983-04-24
                                            183
## 7 AUT
                        1986-11-23
                                            183
## 8 AUT
                        1990-10-07
                                            183
## 9 AUT
                        1994-10-09
                                            183
## 10 AUT
                        1995-12-17
                                            183
## # ... with 299 more rows
```

Other usefull stuff

- tidyr::separate() to separate entries in columns; tidyr::unite to unite columns
- dplyr::rename() to rename variables.
- dplyr::count() count unique values of one or multiple variables.
- dplyr::distinct() or Base R unique() to remove duplicate rows
- dplyr::slice() to get a slice of rows: parlgov_elec %>% slice(1:5) to get the first 5 rows.
- dplyr::across() apply functions to multiple columns.

TIPP Check out the modelsummary functions in more detail for easy crosstabs. ALternatively, use janitor::tabyl.

Problem Set 2

Click here to open.

Advanced Wrangling

Dealing with factor variables: forcats

- Factor variables are useful; especially for plotting and modelling.
- With factor_recode we can easily recode levels:

```
parlgov_elec_de %>%
  mutate(election_type = fct_recode(election_type, # Coerces the type automatically from chr
    Bundestagswahl = "parliament",
    Europawahl = "ep"
    )) %>%
    count(election_type)
```

```
## election_type n
### 1 Europawahl 82
### 2 Bundestagswahl 264
```

• With fct_recorder we can reorder factors (will be usefull for plotting factors).

Complex conditions: if_else and case_when

- Often, we also want to manipulate variables by means of complex conditions
- We will go deeper into control flow statements next week, but here is a sneak preview for data wrangling.
- Say we want to create a variable, "family", that puts parties into some party family based on some arbitrary cutoff of the time-invariant left_right position:

```
parlgov_elec_de <- parlgov_elec_de %>%
  mutate(family = if_else(left_right > 5, "right", "left"))
```

• Vectorised if: if_else(condition, true, false).

Complex conditions: if_else and case_when

- A generalised version of if_else is case_when.
- This is **very** useful:

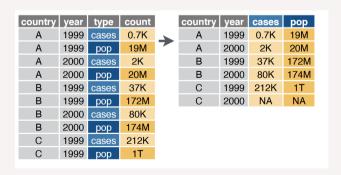
```
parlgov_elec_de <- parlgov_elec_de %>%
  mutate(family = case_when(
    left_right <= 2.5 ~ "left",
    left_right > 2.5 & left_right < 5 ~ "centre-left",
    left_right > 5 & left_right < 7.5 ~ "centre-right",
    left_right >= 7.5 ~ "right"))
```

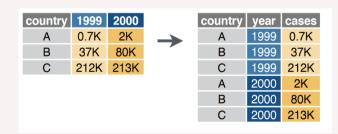
- two-sided formula: LHS = logical test; RHS = value to assign if the test is TRUE.
- Values that do not fall into any of the conditions become NA which can be prevented by adding TRUE ~ something as the last argument.

- Reshaping data is one of the key things you need to when cleaning/analysing data.
- Two functions:
 - tidyr::pivot_wider/longer() is for reshaping from long (wide) to wide (long).

Two main arguments:

• names_* and values_*, where "*" is "to" for pivot_wider() and "from" for pivot_longer().





long → wide: pivot_wider()

wide → long: pivot_longer()

Example:

- Say, we want a table of the vote shares of all major parties for each post-WW2 parliamentary election.
- Where each row is an election:

```
wide <- parlgov_elec_de %>%
  filter(election_type == "parliament", vote_share >= 5, year(election_date) >= 1945) %>%
  select(election_date, party_name_short, vote_share) %>%
  pivot_wider(names_from = party_name_short, values_from = vote_share)
```

Show 5 v entries						Search:				
	election_date •	SPD *	CDU +	FDP •	CSU +	KPD •	GB/BHE	B90/Gru	PDS L	i AfD
1 1	1949-08-14	29.2	25.2	11.9	5.8	5.7				
2 2	1953-09-06	28.8	36.4	9.5	8.8		5.9			
3 2	1957-09-15	31.8	39.7	7.7	10.5					
4 1	1961-09-17	36.2	35.8	12.8	9.6					
5 1	1965-09-19	39.3	38.2	9.5	9.6					
Showing 1 to 5 of 19 entries						Previo	ous 1	2 3	4	Next

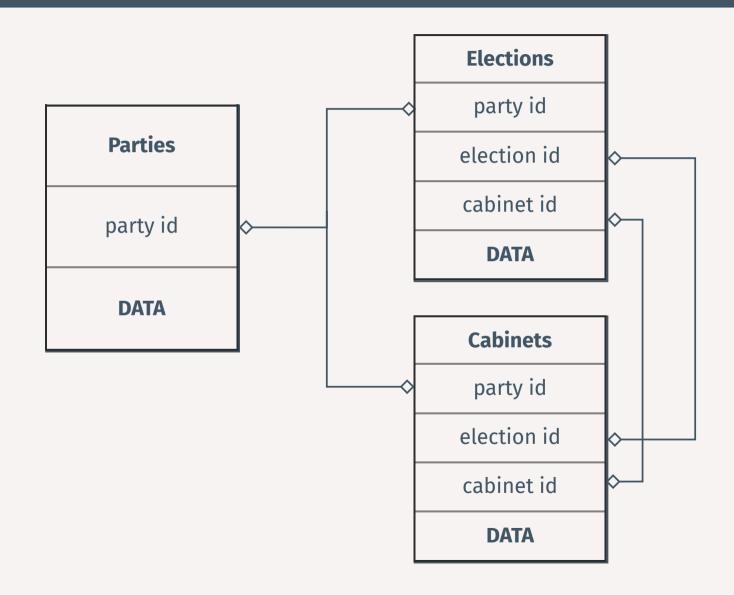
We can revert back to long format:

```
long <- wide %>%
  pivot_longer(!election_date, names_to = "party_name_short", values_to = "vote_share") %>%
  filter(is.na(vote_share) == FALSE) # alternatively, simply set values_drop_na to TRUE in party_name(long)
```

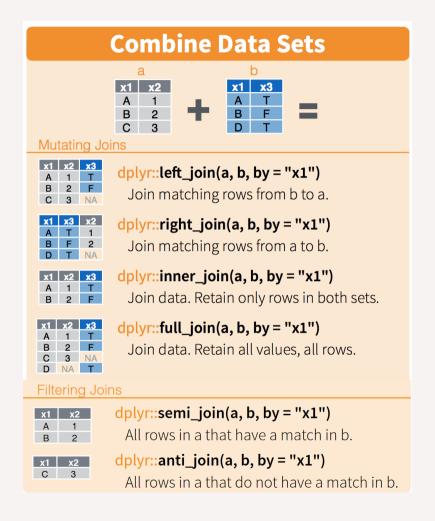
```
## # A tibble: 6 x 3
###
    election date party name short vote share
    <date>
             <chr>
                                         < [db>
4F4F
## 1 1949-08-14
                  SPD
                                          29.2
## 2 1949-08-14
                                          25.2
                  CDU
                                          11.9
## 3 1949-08-14
                  FDP
## 4 1949-08-14
                                           5.8
                  CSU
## 5 1949-08-14
                   KPD
                                           5.7
## 6 1953-09-06
                                          28.8
                   SPD
```

• Let's come back to the relational nature of our data...

The Data



- Let's come back to the relational nature of our data...
- Remember, they consist of different tables, each representing one "entity type" (c.f. the 3rd. point in Wickham's tidy data framework)
- Each table has a unique key, representing each row. This key variable is used to link/join tables
- Suppose we want to join the party and the election table, how do we do that?



Q Which join do we need?

We want a left join here...

```
parlgov party <- rio::import("http://www.parlgov.org/static/data/development-utf-8/view party.csv")</pre>
l joined <- left join(parlgov elec de, parlgov party, by = "party id")</pre>
head(l_joined)
4‡4‡
     country name short.x country name.x election type election date vote share
## 1
                                              parliament
                                                            1919-01-19
                                                                             37.87
                       DEU
                                  Germany
## 2
                      DEU
                                  Germany
                                             parliament
                                                           1919-01-19
                                                                            18.32
## 3
                      DEU
                                  Germany
                                             parliament
                                                           1919-01-19
                                                                            15.45
## 4
                                             parliament
                      DFU
                                  Germany
                                                            1919-01-19
                                                                            10.26
## 5
                                              parliament
                      DEU
                                  Germany
                                                            1919-01-19
                                                                              4.66
## 6
                      DEU
                                              parliament
                                                            1919-01-19
                                                                              7.63
                                  Germany
##
     seats seats_total party_name_short.x
## 1
       165
                   423
                                       SPD
## 2
                                       DDP
        74
                   423
## 3
        73
                   423
                                        DΖ
## 4
        41
                   423
                                      DNVP
## 5
        23
                    423
                                       DVP
```

- There are multiple matching (by name) variables in both tables.
- Hence, we need to specify all keys, or let dplyr do its magic:

l joined <- left join(parlgov elec de, parlgov party)</pre>

```
head(l_joined)
4F4F
     country name short country name election type election date vote share seats
## 1
                    DEU
                                         parliament
                                                        1919-01-19
                                                                         37.87
                              Germany
                                                                                 165
## 2
                    DEU
                              Germany
                                         parliament
                                                        1919-01-19
                                                                         18.32
                                                                                 74
## 3
                                         parliament
                                                                        15.45
                    DEU
                              Germany
                                                        1919-01-19
                                                                                 73
## 4
                                         parliament
                                                                         10.26
                    DEU
                              Germany
                                                        1919-01-19
                                                                                  41
## 5
                    DEU
                              Germany
                                         parliament
                                                        1919-01-19
                                                                          4.66
                                                                                  23
## 6
                    DEU
                                         parliament
                                                        1919-01-19
                                                                          7.63
                                                                                  22
                              Germany
4F4F
     seats total party name short
## 1
             423
                               SPD
## 2
             423
                               DDP
## 3
             423
                                D7
## 4
             423
                              DNVP
```

Alternative approaches

- For every tidyverse function ("verb"), there is, of course, a base R way to do it.
- There are alternatives.
- For instance, the **data.table** and **collapse** (also comes with fast versions of summary stats and models) package provide great and fast data wrangling alternatives.
- Data.table syntax is closer to the base R way of indexing/manipulating data frames. Some like that.
- Don't be dogmatic. Use whatever suits you and your context. Mix stuff.
- You can find a great comparison of data.table and dplyr here.

A glimpse at data.table

- Comes with its own interpretation of data frames, "data tables". Special structure to work faster.
- Looks similar to basic df[] indexing but with alot of twists.
- Three elements: which observations/rows COMMA transformations or other functions COMMA grouping.

Rough dplyr equivalent:

```
DT[slice(); filter(); arrange(), select(); mutate(), group_by()]
```

A glimpse at data.table

Example:

```
parlgov_elec_de %>% # add, e.g., _de if we
  filter(party_name_short == "SPD") %>%
  summarise(mean(vote_share, na.rm = T))
```

```
## mean(vote_share, na.rm = T)
## 1 31.12622
```

```
setDT(parlgov_elec_de)
parlgov_elec_de[party_name_short == "SPD",
## [1] 31.12622
```

Problem Set 03/"Homework"

- This last problem set may take a bit longer
- Try to get as far as you can in the remaining time and finish the rest at home (if you want)

Next Up: Data Viz