CSSS 508, Lecture 2

Visualizing Data

Michael Pearce (based on slides from Chuck Lanfear) October 6, 2022



But First...

Some useful coding tips

>&55**-**

Comments

You may have noticed that sometimes I write code that looks like this:

```
new.object <- 1:10 # Making vector of 1 to 10</pre>
```

is known as the commenting symbol in R!

Anything written after # will not be run by R.

This is useful for annotating your code to remind others (and you!) how your code works.¹

[1] In R Markdown documents, comments only work in chunks. Outside of a chunk, # creates **headers** like "comments" at the top of this slide.

Saving Data

You can save an R object on your computer as a file to open later:

```
save(new.object, file="new_object.RData")
```

You can open saved files in R as well:

```
load("new_object.RData")
```

But where are these files being saved and loaded from?

Working Directories

R saves files and looks for files to open in your current **working directory**. You can ask R what this is:

getwd()

```
## [1] "/Users/pearce790/Desktop/Lectures/Lecture2"
```

Similarly, we can set a working directory like so:

```
setwd("C:/Users/pearce790/CSSS508/HW2")
```

Don't set a working directory in R Markdown documents! They automatically set the directory they are in as the working directory.

Managing Files

When managing R projects, it is normally best to give each project (such as a homework assignment) its own folder. I use the following system:

- Every class or project has its own folder
- Each assignment or task has a folder inside that, which is the working directory for that item.
- Rmd and R files are named clearly and completely

For example, this presentation is located and named this: GitHub/CSSS508/Lectures/Lecture2/CSSS508_Lecture2_ggplot2.Rmd

You can use whatever system you want, but be consistent so your projects are organized! You don't want to lose work by losing or overwriting files!

File Types

We mainly work with four file types in this class:

- .Rmd: These are **markdown** *syntax* files, where you write code to *make documents*.
- R: These are **R** syntax files, where you write code to process and analyze data without making an output document.
- .html or .pdf: These are the output documents created when you *knit* a markdown document.

Make sure you understand the difference between the uses of these file types!



Gapminder Data

We'll be working with data from Hans Rosling's <u>Gapminder</u> project. An excerpt of these data can be accessed through an R package called gapminder, cleaned and assembled by Jenny Bryan at UBC.

In the console: install.packages("gapminder")

Load the package and data:

library(gapminder)

Check Out Gapminder

The data frame we will work with is called <code>gapminder</code>, available once you have loaded the package. Let's see its structure:

```
str(gapminder)
```

```
## tibble [1,704 × 6] (S3: tbl_df/tbl/data.frame)
## $ country : Factor w/ 142 levels "Afghanistan",..: 1 1 1 1 1 1 1 1 1 1 1 1 ...
## $ continent: Factor w/ 5 levels "Africa","Americas",..: 3 3 3 3 3 3 3 3 3 3 3 ...
## $ year : int [1:1704] 1952 1957 1962 1967 1972 1977 1982 1987 1992 1997 ...
## $ lifeExp : num [1:1704] 28.8 30.3 32 34 36.1 ...
## $ pop : int [1:1704] 8425333 9240934 10267083 11537966 13079460 14880372 12881816 13867957 1
## $ gdpPercap: num [1:1704] 779 821 853 836 740 ...
```

What's Interesting Here?

- Factor variables country and continent
 - Factors are categorical data with an underlying numeric representation
 - We'll spend a lot of time on factors later!
- Many observations: n = 1704 rows
- For each observation, a few variables: p = 6 columns
- A nested/hierarchical structure: year in country in continent
 - These are panel data!



·UW CS&SS

Installing Tidyverse

We'll want to be able to slice up this data frame into subsets (e.g. just the rows for Afghanistan, just the rows for 1997).

We will use a package called dplyr to do this neatly.

dplyr is part of the <u>tidyverse</u> family of R packages that are the focus of this course.

If you have not already installed the tidyverse, type, in the console: install.packages("tidyverse")

This will install a *large* number of R packages we will use throughout the term, including dplyr.

dplyr is a very useful and powerful package that we will talk more about soon, but today we're just going to use it for "filtering" data.

Loading dplyr

library(dplyr)

```
## Warning: package 'dplyr' was built under R version 3.6.2
##
## Attaching package: 'dplyr'

## The following objects are masked from 'package:stats':
##
## filter, lag

## The following objects are masked from 'package:base':
##
## intersect, setdiff, setequal, union
```

Wait, was that an error?

When you load packages in R that have functions sharing the same name as functions you already have, the more recently loaded functions overwrite the previous ones ("masks them").

This **message** is just letting you know that. To avoid showing this in your R Markdown file, add message=FALSE or include=FALSE to your chunk options when loading packages.

Sometimes you may get a **warning message** when loading packages---usually because you aren't running the latest version of R:

```
Warning message:
package `gapminder' was built under R version 3.5.3
```

Chunk options message=FALSE or include=FALSE will hide this. *Update R* to deal with it completely!

Pipes

dplyr allows us to use the "pipe" data between functions using the (%>%) operator. So instead of nesting functions like this:

```
log(mean(gapminder$pop))
```

```
## [1] 17.20333
```

We can pipe them like this:

```
gapminder$pop %>% mean() %>% log()
```

```
## [1] 17.20333
```

Read this as, "send gapminder\$pop to mean(), then send the output of that to log()." In essence, pipes read "left to right" while nested functions read "inside to out." This may be confusing... we'll cover it more later!

filter Data Frames

gapminder %>% filter(country == "Algeria")

```
## # A tibble: 12 × 6
     country continent
                        year lifeExp pop gdpPercap
##
     <fct>
             <fct>
                       <int>
                               <dbl>
                                        <int>
                                                  <dbl>
##
   1 Algeria Africa
                        1952
                                43.1 9279525
                                                  2449.
##
   2 Algeria Africa
                        1957
                                45.7 10270856
                                                  3014.
##
   3 Algeria Africa
                        1962
                                48.3 11000948
                                                  2551.
##
   4 Algeria Africa
                                51.4 12760499
##
                        1967
                                                  3247.
   5 Algeria Africa
                        1972
                                54.5 14760787
                                                  4183.
##
   6 Algeria Africa
                        1977
                                58.0 17152804
                                                  4910.
##
   7 Algeria Africa
                        1982
                                61.4 20033753
                                                  5745.
##
   8 Algeria Africa
##
                        1987
                                65.8 23254956
                                                  5681.
   9 Algeria Africa
                                67.7 26298373
                                                  5023.
##
                        1992
## 10 Algeria Africa
                        1997
                                69.2 29072015
                                                  4797.
## 11 Algeria Africa
                        2002
                                71.0 31287142
                                                  5288.
## 12 Algeria Africa
                        2007
                                72.3 33333216
                                                  6223.
```

What is this doing?

How Expressions Work

What does country == "Algeria" actually do?

```
head(gapminder$country == "Algeria", 50) # display first 50 elements
```

It returns a vector of TRUE or FALSE values.

Check your understanding: How are ==, = and <- the same or different?

Logical Operators

We used == for testing "equals": country == "Algeria".

There are many other <u>logical operators</u>:

- !=: not equal to
- >, >=, <, <=: less than, less than or equal to, etc.
- %in%: used with checking equal to one of several values

Or we can combine multiple logical conditions:

- 8: both conditions need to hold (AND)
- | : at least one condition needs to hold (OR)
- !: inverts a logical condition (TRUE becomes FALSE, FALSE becomes TRUE)

We'll use these a lot so don't worry too much right now!

Multiple Conditions Example

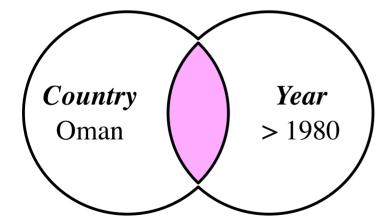
```
gapminder %>%
filter(country == "Oman" & year > 1980)
```

```
## # A tibble: 6 × 6
##
     country continent
                        year lifeExp
                                         pop gdpPercap
     <fct>
             <fct>
                       <int>
                               <dbl>
                                       <int>
                                                  <dbl>
##
             Asia
                                62.7 1301048
                                                 12955.
## 1 Oman
                        1982
             Asia
                                67.7 1593882
                                                 18115.
## 2 Oman
                        1987
             Asia
  3 Oman
                        1992
                                71.2 1915208
                                                 18617.
             Asia
  4 Oman
                        1997
                                72.5 2283635
                                                 19702.
             Asia
## 5 Oman
                        2002
                                74.2 2713462
                                                 19775.
             Asia
                        2007
                                75.6 3204897
                                                 22316.
## 6 Oman
```

Multiple Conditions

And: &

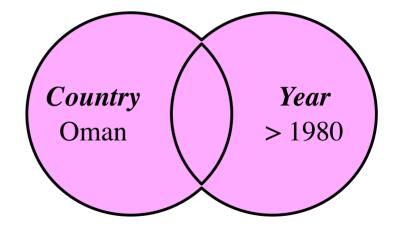
```
gapminder %>%
  filter(country == "Oman" &
      year > 1980)
```



Give me rows where the country is Oman **and** the year is after 1980.

Or:

```
gapminder %>%
  filter(country == "Oman" |
    year > 1980)
```



Give me rows where the country is Oman **or** the year is after 1980... or **both**.

Saving a Subset

If we think a particular subset will be used repeatedly, we can save it and give it a name like any other object:

```
head(China, 4)
## # A tibble: 4 × 6
    country continent
                      year lifeExp pop gdpPercap
##
    <fct>
            <fct>
                     <int>
                             <dbl>
                                      <int>
                                                <dbl>
##
## 1 China
            Asia
                              44
                                                 400.
                      1952
                                   556263527
## 2 China
           Asia
                                                 576.
                      1957 50.5 637408000
## 3 China
            Asia
                      1962 44.5 665770000
                                                 488.
## 4 China
            Asia
                              58.4 754550000
                                                 613.
                      1967
```

China <- gapminder %>% filter(country == "China")

Summary

We've discussed a lot so far:

- Commenting (mean(x) # take mean of x)
- Saving/Loading files (save(), load())
- Working Directories (setwd(), getwd())
- Pipes (gapminder %>% filter(country == "Algeria"))
- Logical Operators (!=, ==, >, <=)
- Combining Logical Operators (AND using &, OR using |)

With time and practice, these tools will become second nature!

Test Your Knowledge

Question 1: How could I filter the gapminder data to observations from Mexico after 1980?

Question 2: What's the mean life expectancy in Mexico after 1980, based on this dataset?¹

Take 1 minute to work on this problem by yourself, then talk through your ideas with your neighbor.

Hint: Save the result from the first question in one line of code, then write a second line of code to answer the second question.

My Solution

Question 1: How could I filter the gapminder data to observations from Mexico after 1980?

Question 2: What's the mean life expectancy in Mexico after 1980, based on this dataset?

```
Mexico1980$lifeExp %>% mean()
```

```
## [1] 72.1875
```

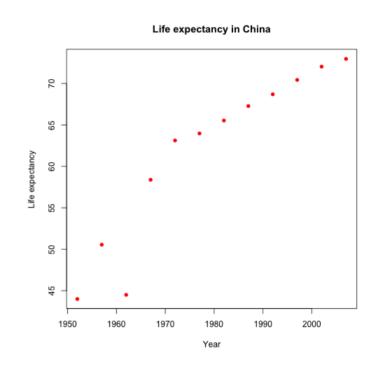


-UW CS&SS

Base R Plots from Last Week

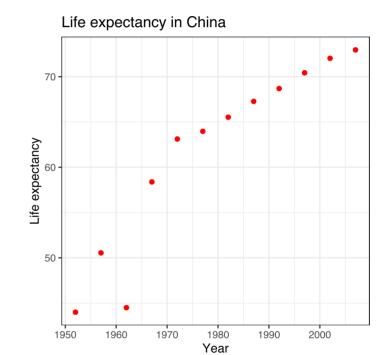
```
plot(lifeExp ~ year,
    data = China,
    xlab = "Year",
    ylab = "Life expectancy",
    main = "Life expectancy in China",
    col = "red",
    cex.lab = 1.5,
    cex.main= 1.5,
    pch = 16)
```

The plot is made with *one function* and *many arguments*



Starter Example in ggplot

This ggplot is made with many functions and fewer arguments in each



ggplot2

An alternative way of plotting uses the ggplot2 package in R, which is part of the tidyverse.

library(ggplot2)

Warning: package 'ggplot2' was built under R version 3.6.2

The core idea underlying this package is the <u>layered grammar of graphics</u>: we can break up elements of a plot into pieces and combine them.

ggplots are a bit harder to create, but are usually:

- prettier,
- more professional, and
- more customizable!

Structure of a ggplot

ggplot2 graphics objects consist of two primary components:

- 1. **Layers**, the components of a graph.
 - We *add* layers to a ggplot2 object using +.
 - This includes adding lines, shapes, and text to a plot.
- 2. **Aesthetics**, which determine how the layers appear.
 - We set aesthetics using arguments (e.g. color="red") inside layer functions.
 - This includes modifying locations, colors, and sizes of the layers.

Layers

Layers are the components of the graph, such as:

- ggplot(): initializes ggplot2 object, specifies input data
- geom_point(): layer of scatterplot points
- geom_line(): layer of lines
- ggtitle(), xlab(), ylab(): layers of labels
- facet_wrap(): layer creating separate panels stratified by some factor wrapping around
- facet_grid(): same idea, but can split by two variables along rows and columns (e.g. facet_grid(gender ~ age_group))
- theme_bw(): replace default gray background with black-and-white

Layers are separated by a + sign. For clarity, I usually put each layer on a new line.

Aesthetics

Aesthetics control the appearance of the layers:

- x, y: x and y coordinate values to use
- color: set color of elements based on some data value, e.g., color=red,
 color=continent
- group: describe which points are conceptually grouped together for the plot (often used with lines)
- size: set size of points/lines based on some data value (greater than 0)
- alpha: set transparency based on some data value (between 0 and 1)

Examples: Basic Jargon in Action!

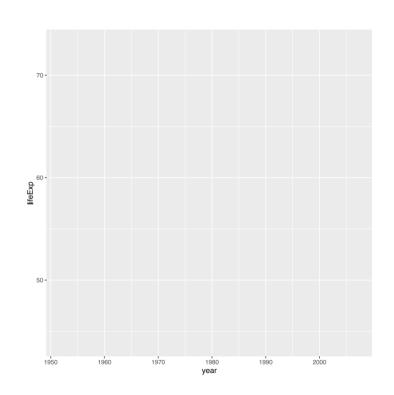
We'll now build up two ggplot's together that demonstrate common layers and aesthetics.

·UW CS&SS·

Axis Labels, Points, No Background

1: Base Plot

```
ggplot(data = China,
aes(x = year, y = lifeExp))
```

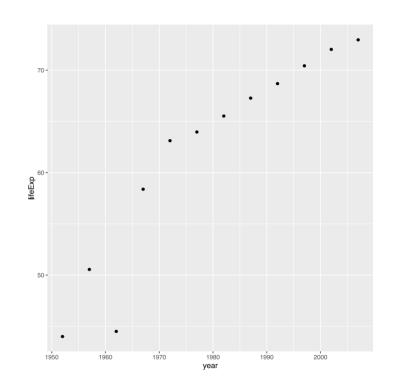


Initialize the plot with ggplot() and x and y aesthetics **mapped** to variables. These aesthetics will be accesible to any future layers since they're in the primary layer.

Axis Labels, Points, No Background

2: Scatterplot

```
ggplot(data = China,
    aes(x = year, y = lifeExp)) +
   geom_point()
```

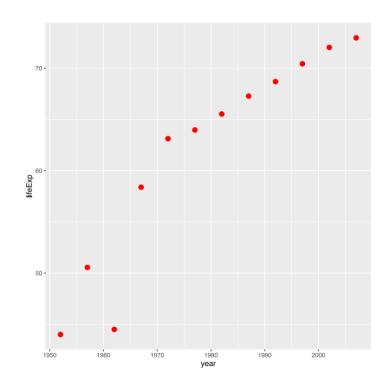


Add a scatterplot layer.

Axis Labels, Points, No Background

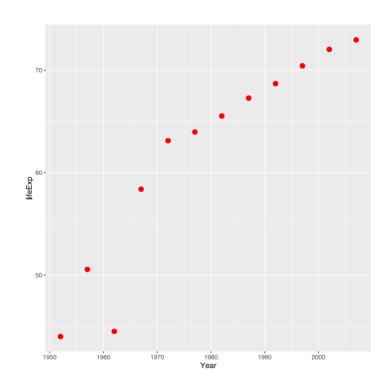
3: Point Color and Size

```
ggplot(data = China,
          aes(x = year, y = lifeExp)) +
    geom_point(color = "red", size = 3)
```



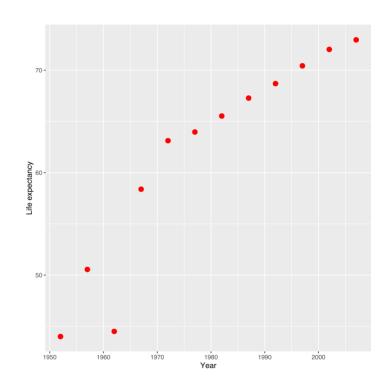
Set aesthetics to make the points large and red.

4: X-Axis Label



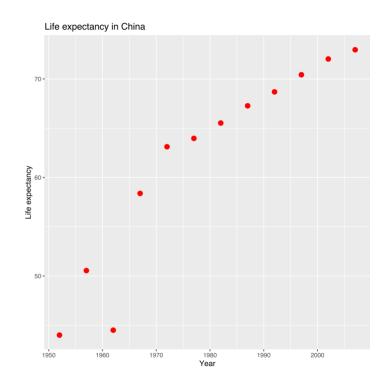
Add a layer to capitalize the x-axis label.

5: Y-Axis Label



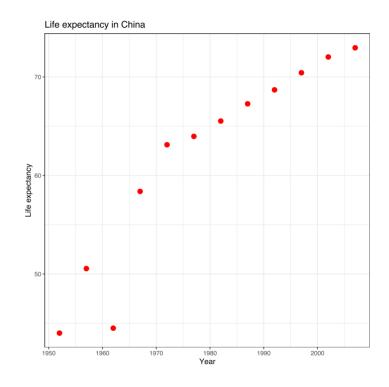
Add a layer to clean up the y-axis label.

6: Title



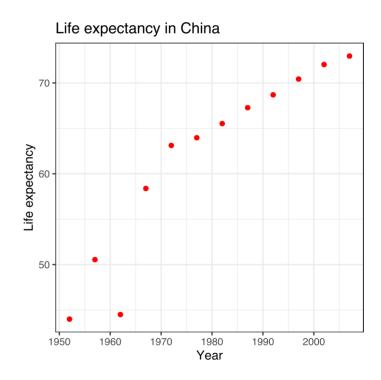
Add a title layer.

7: Theme



Pick a nicer theme with a new layer.

8: Text Size



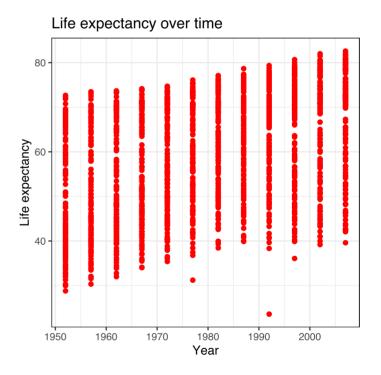
Increase the base text size.

We have a plot we like for China...

... but what if we want all the countries?

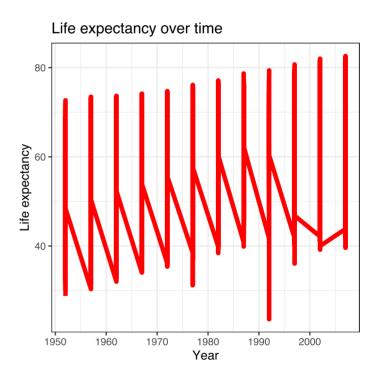
1: A Mess!

```
ggplot(data = gapminder,
      aes(x = year, y = lifeExp)) +
  geom point(color = "red", size = 3) +
  xlab("Year") +
 vlab("Life expectancy") +
  ggtitle("Life expectancy over time") +
  theme_bw(base_size=18)
```



We can't tell countries apart! Maybe we could follow *lines*?

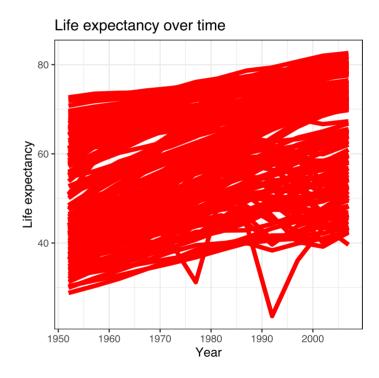
2: Lines



ggplot2 doesn't know how to connect the lines!

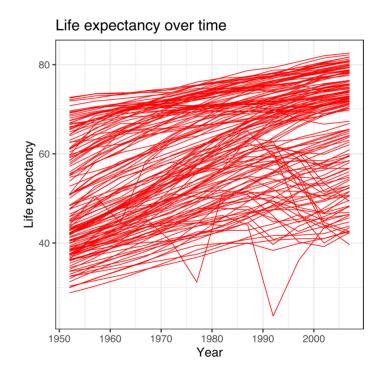
3: Grouping

```
ggplot(data = gapminder,
      aes(x = year, y = lifeExp,
           group = country)) +
  geom line(color = "red", size = 3) +
  xlab("Year") +
 ylab("Life expectancy") +
  ggtitle("Life expectancy over time") +
  theme_bw(base_size=18)
```



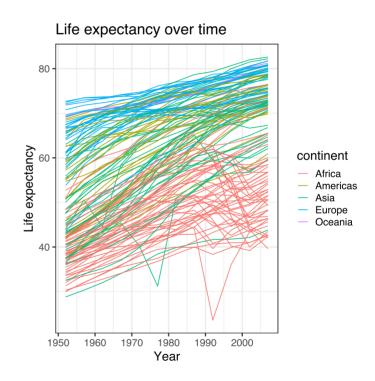
That looks more reasonable... but the lines are too thick!

4: Size



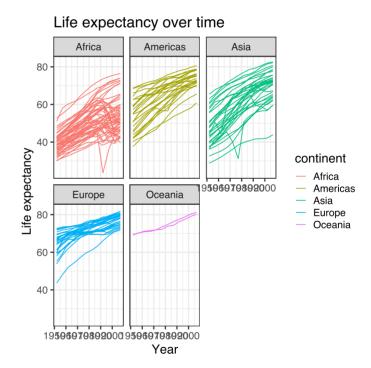
Much better... but maybe we can do highlight regional differences?

5: Color



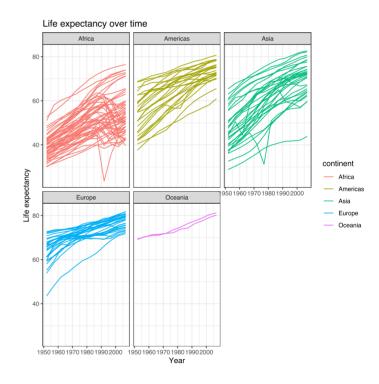
Patterns are obvious... but why not separate continents completely?

6: Facets



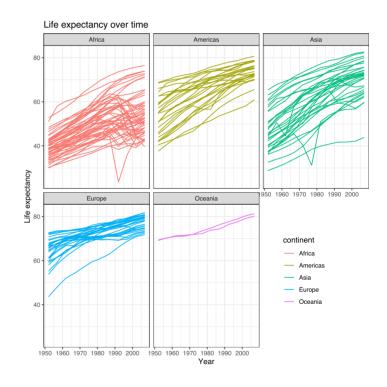
Now the text is too big!

7: Text Size



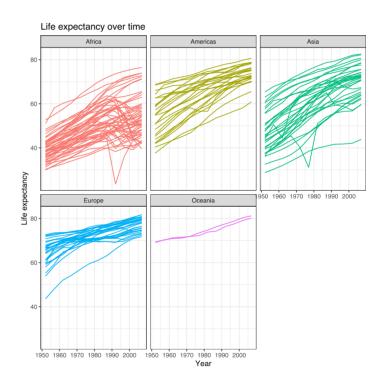
Better, but could bring that legend in.

8: Legend Position



Better... but do we even need it?

9: No Legend



Looking good!

More Advanced Functionalities

Next, we'll discuss:

- Storing and saving plots
- Advanced axis changes (scales, text, ticks)
- Legendary legend changes (scales, colors, locations)

Storing Plots

We can assign a ggplot object to a name:

```
lifeExp_by_year <-
    ggplot(data = gapminder,
        aes(x = year, y = lifeExp,
             group = country,
             color = continent)) +

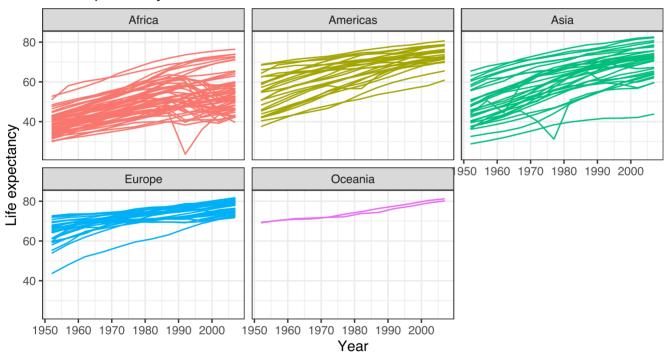
geom_line() +
    xlab("Year") +
    ylab("Life expectancy") +
    ggtitle("Life expectancy over time") +
    theme_bw() +
    facet_wrap(~ continent) +
    theme(legend.position = "none")</pre>
```

The graph won't be displayed when you do this. You can show the graph using a single line of code with just the object name, or take the object and add more layers.

Showing a Stored Graph

lifeExp_by_year

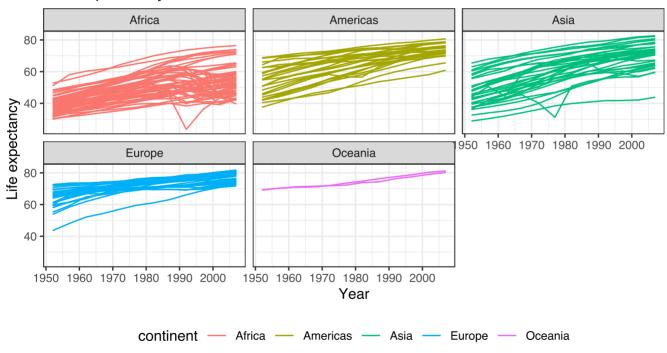
Life expectancy over time



Adding a Layer

```
lifeExp_by_year +
   theme(legend.position = "bottom")
```

Life expectancy over time



Saving ggplot Plots

When you knit an R Markdown file, any plots you make are automatically saved in the "figure" folder in .png format. If you want to save another copy (perhaps of a different file type for use in a manuscript), use ggsave():

```
ggsave("I_saved_a_file.pdf", plot = lifeExp_by_year,
    height = 3, width = 5, units = "in")
```

If you didn't manually set font sizes, these will usually come out at a reasonable size given the dimensions of your output file.

Bad/non-reproducible way¹: choose *Export* on the plot preview or take a screenshot / snip.

[1] I still do this for quick emails of simple plots. Bad me!

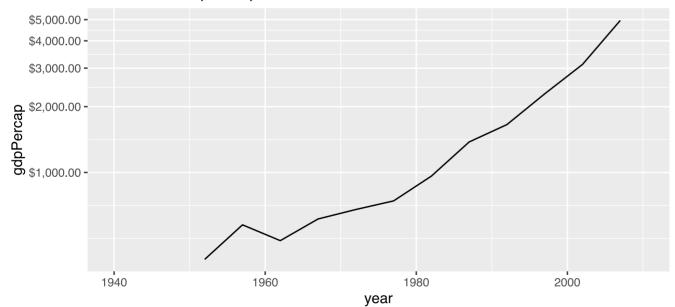
Changing the Axes

We can modify the axes in a variety of ways, such as:

- Change the x or y range using xlim() or ylim() layers
- Change to a logarithmic or square-root scale on either axis: scale_x_log10(), scale_y_sqrt()
- Change where the major/minor breaks are:
 scale_x_continuous(breaks =, minor_breaks =)

Axis Changes

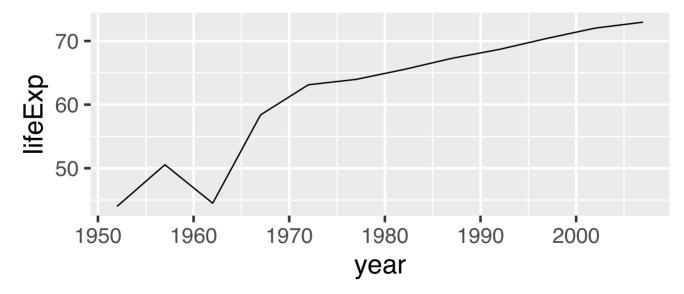
Chinese GDP per capita



Fonts Too Small?

```
ggplot(data = China, aes(x = year, y = lifeExp)) +
    geom_line() +
    ggtitle("Chinese life expectancy") +
    theme_gray(base_size = 20)
```

Chinese life expectancy



Text and Tick Adjustments

Text size, labels, tick marks, etc. can be messed with more precisely using arguments to the theme() layer.

- plot.title = element_text(size = rel(2), hjust = 0) makes the title twice as big as usual and left-aligns it
- axis.text.x = element_text(angle = 45) rotates x axis labels
- axis.text = element_text(colour = "blue") makes the x and y axis labels blue
- axis.ticks.length = unit(.5, "cm") makes the axis ticks longer

I recommend using theme() after theme_bw() or other global themes.

Scales for Color, Shape, etc.

Scales are layers that control how the mapped aesthetics appear.

You can modify these with a scale_[aesthetic]_[option]() layer:

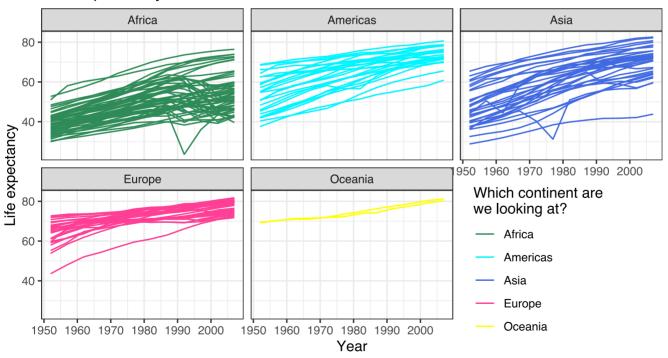
- [aesthetic] is color, shape, linetype, alpha, size, fill, etc.
- [option] is something like manual, continuous or discrete (depending on nature of the variable).

Examples:

- scale_linetype_manual(): manually specify the linetype for each different value
- scale_alpha_continuous(): varies transparency over a continuous range
- scale_color_brewer(palette = "Spectral"): uses a palette from http://colorbrewer2.org (great site for picking nice plot colors!)

Legend Name and Manual Colors

Life expectancy over time





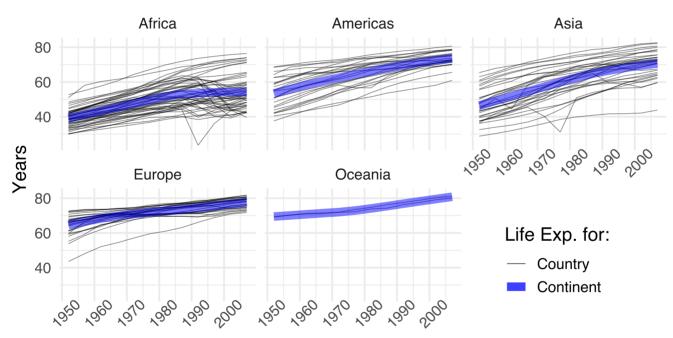
JW CS&SS

End Result

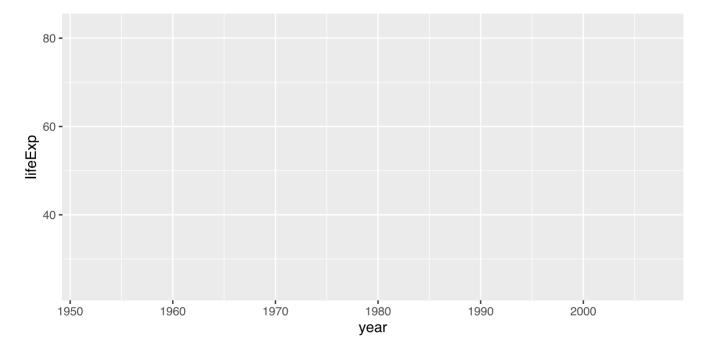
We're going to *slowly* build up a *really detailed plot* now!

Life Expectancy, 1952-2007

By continent and country

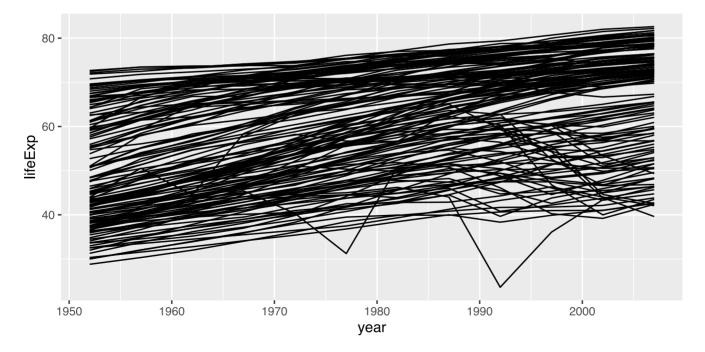


1. Base Plot

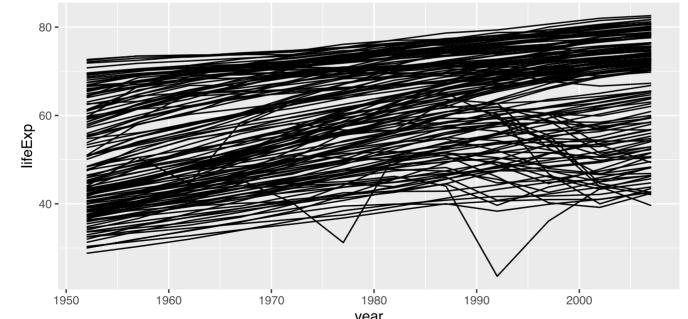


2. Lines

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

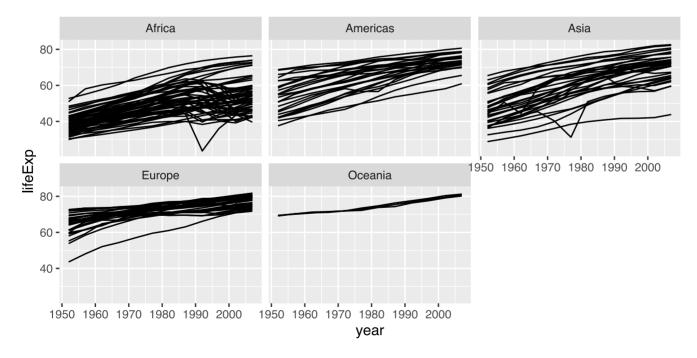


3. Continent Average

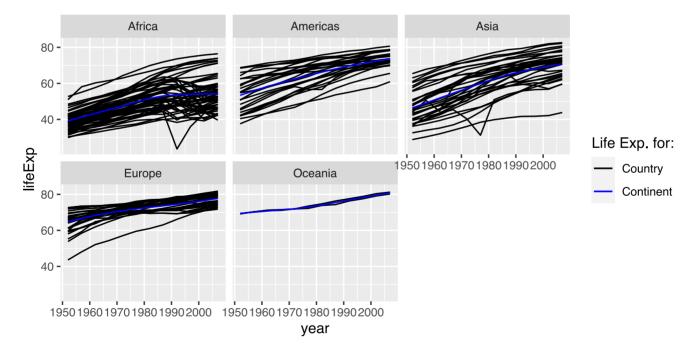


Note: A <u>loess curve</u> is something like a moving average.

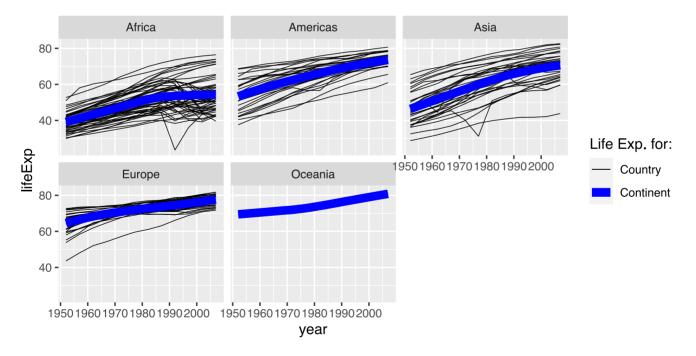
4. Facets



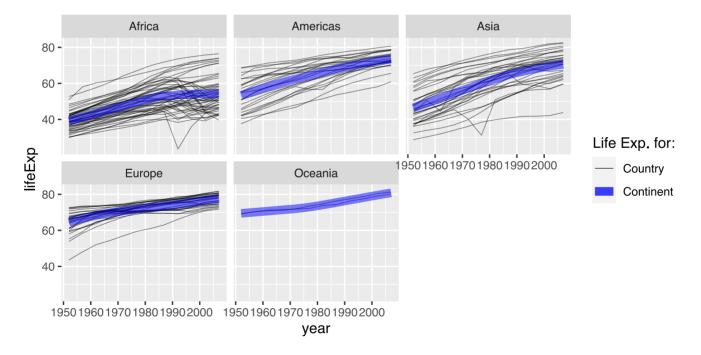
5. Color Scale



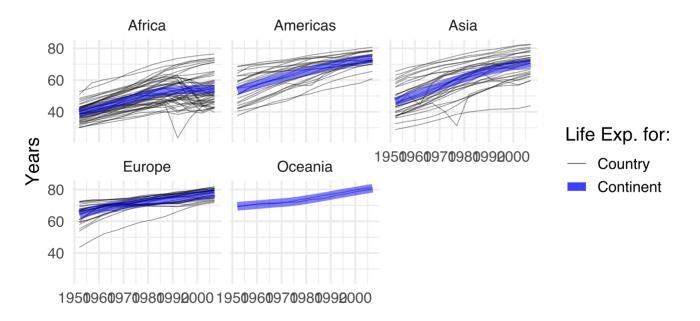
6. Size Scale



7. Alpha (Transparency)

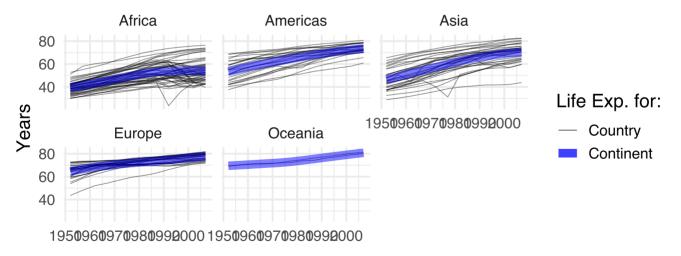


8. Theme and Labels



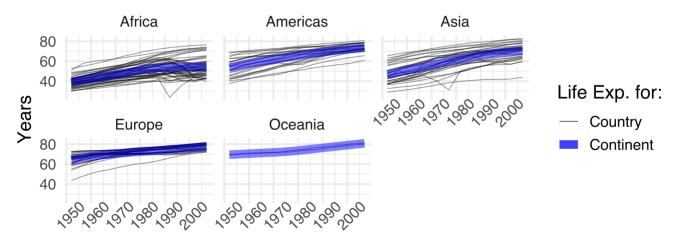
9. Title and Subtitle

Life Expectancy, 1952-2007 By continent and country



10. Angled Tick Values

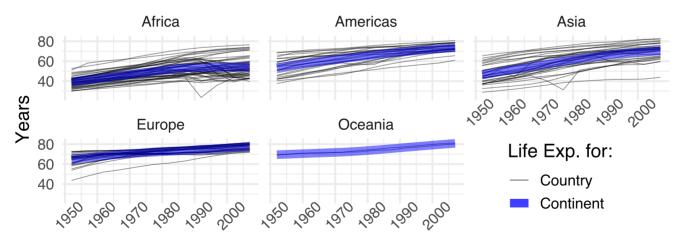
Life Expectancy, 1952-2007 By continent and country



Note: Fewer values might be better than angled labels!

11. Legend Position

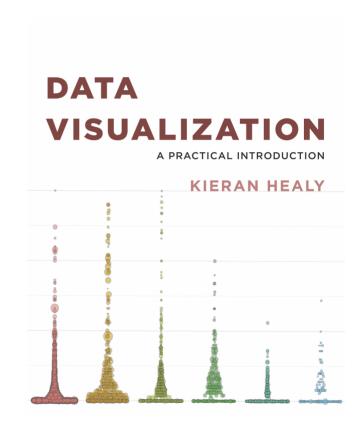
Life Expectancy, 1952-2007 By continent and country



Summary

ggplot2 can do a LOT! I won't expect you to remember all these tools.

- With time and practice, you'll start to remember the key tools
- When in doubt, Google it! ("*R ggplot rename title*")
- There are lots of great resources out there:
 - The Cookbook for R website
 - The RStudio ggplot Cheatsheets.
 - Kieran Healy's book <u>Data</u>
 <u>Visualization: A Practical</u>
 <u>Introduction</u> (right) which is targeted at social scientists without technical backgrounds.



Exercise: Histograms

In pairs, you will create a histogram of life expectancy observations in the complete Gapminder dataset.

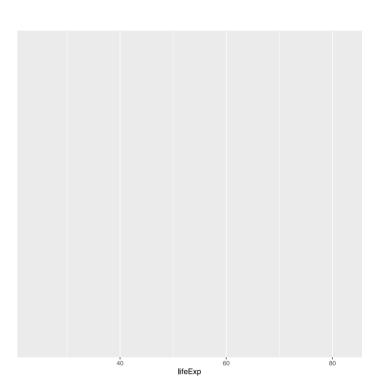
- 1. Set the base layer by specifying the data as gapminder and the x variable as lifeExp
- 2. Add a second layer to create a histogram using the function geom_histogram()
- 3. Customize your plot with nice axis labels and a title.

·UW CS&SS·

My Solution

1: Set Base Layer

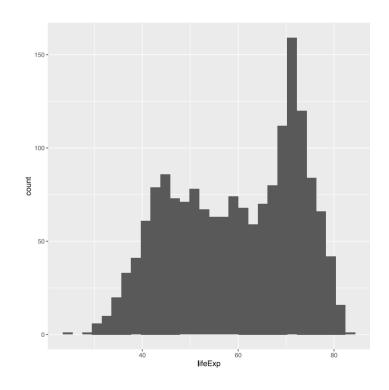
ggplot(gapminder,aes(x=lifeExp))



My Solution

2: Add Histogram Layer

ggplot(gapminder,aes(x=lifeExp))+
 geom_histogram(bins=30)

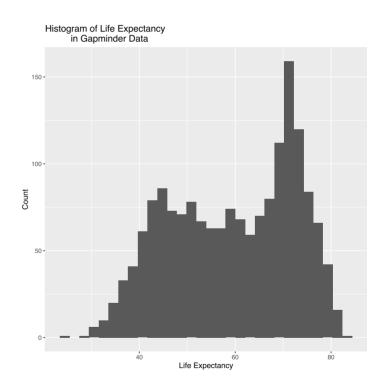


Setting the bins argument removes a pesky message!

TW CS&rSS 79/81

My Solution

3: Add Aesthetics



Homework 2

Pick some relationship to look at in the Gapminder data and write up a .Rmd file investigating that question graphically. You might work with a subset of the data (e.g. just Africa). Upload both the .Rmd file and the .html file to Canvas.

- Include 4 to 8 plots.
- All titles, axes, and legends should be labelled clearly (no raw variable names).
- You must have at least one graph with facet_wrap() or facet_grid().
- You must include at least one manually specified legend.
- You can use other geoms like histograms, bar charts, add vertical or horizontal lines, etc.

Your document should be pleasant for a peer to look at, with some organization. You must write up your observations in words as well as showing the graphs. Use chunk options like echo=FALSE to limit the code/output you show in the .html.

-UW CS&SS