

#### ALVAREZ

College of Business

The University of Texas at San Antonio

# Introduction to Programming in R

Module 3:

Communication



### Learning Objectives

- Communicating with Markdown
- Creating .Rmd files
- Output and knitting .Rmd
- Visualization with ggplot2
- Creating a plot with ggplot2
- Scatterplots, bar charts, histograms, and other plots
- Aesthetics, facets, plotting objects, and trendlines
- Overlaying multiple plots



#### Communicating

- R markdown lets you create documents that can help you communicate your findings to decision-makers (including yourself).
- Elegant and concise way to record and present your code, results, and thoughts.
- Makes research reproducible, so that others can easily understand and replicate, if needed.
- I find this particularly helpful working with graduate students. They can show me what they did, exactly, and provide narration with it.
- There are some basic Markdown syntax that we'll cover here. As you progress with this program and in your career, you'll use more.
- Markdown can output into .pdf, .doc, .html, and other popular file formats.
- Also cover some plotting techniques to produce elegant visuals. There will be more on visuals in the Visualization course.



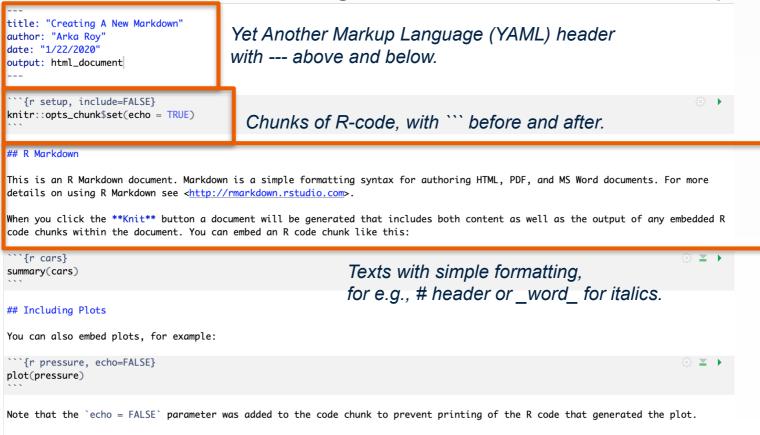
#### R Markdown Basics

- Markdown file (.Rmd) can help with:
  - Communicating with decision-makers with focus on insights and takeaways, rather than code.
  - Collaborating with other researchers, as well as future you, with focus of understanding the code and the results.
  - Notetaking for other users, as well as future you, with a focus of documenting your thought process.
- Merges many external packages to work. So the built-in help function ? is limited.
  - R Markdown Cheat Sheet: Help > Cheatsheets > R Markdown Cheat Sheet,
  - R Markdown Reference Guide: Help > Cheatsheets > R Markdown Reference Guide.
- Markdown uses "rmarkdown" package, but R-studio comes with it loaded.



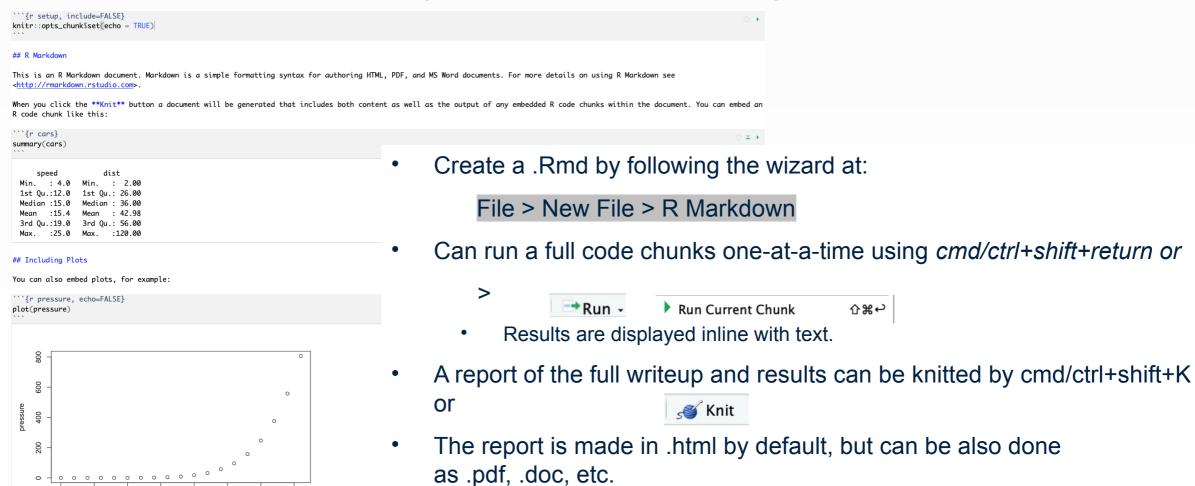
#### What .Rmd looks like

Typical markdown looks something like this... with code and prose mixed.





# Creating and Running .Rmd





#### Text formatting in .Rmd

```
Text formatting
*italic* or _italic_
**bold** __bold__
superscript^2^ and subscript~2~
Headings
# 1st Level Header
## 2nd Level Header
### 3rd Level Header
Lists
* Bulleted list item 1
* Item 2
    * Item 2a
    * Item 2b
1. Numbered list item 1
1. Item 2. The numbers are incremented automatically in the output.
Tables
First Header | Second Header
Content Cell | Content Cell
Content Cell | Content Cell
```



#### **Text formatting**

italic or italic **bold bold** code superscript<sup>2</sup> and subscript<sub>2</sub>

#### Headings

1st Level Header

2nd Level Header

3rd Level Header

#### Lists

- Bulleted list item 1
- Item 2
  - o Item 2a
  - Item 2b
- 1. Numbered list item 1
- 2. Item 2. The numbers are incremented automatically in the output.

#### **Tables**

| First Header | Second Header |
|--------------|---------------|
| Content Cell | Content Cell  |
| Content Cell | Content Cell  |

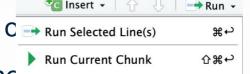


#### Code Chunks in .Rmd

Insert a code chunk in markdown by cmd/ctrl+shift+l typing in ```{r} and ``` before and after code.

or manually

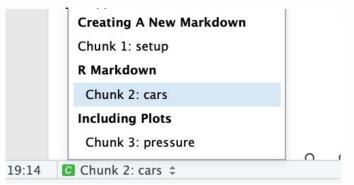
You can run a code chunk by cmd/ctrl+shift+return c → Run Selected Line(s)



Using cmd/ctrl+return will still only run the single line of code.

```{r cars}
summary(cars)

• Inside the ```{r and } you can define your own name for the chunk. For example, ``` the 2<sup>nd</sup> chunk is named cars and it can be easily accessed via the navigation pane at the



| Option          | Execute code | Show code | Output   | Plots    | Messages | Warnings |
|-----------------|--------------|-----------|----------|----------|----------|----------|
| eval=false      |              | <b>√</b>  |          |          |          |          |
| include=false   | <b>√</b>     |           |          |          |          |          |
| echo=false      | <b>√</b>     |           | <b>√</b> | <b>√</b> | <b>√</b> | <b>√</b> |
| results='hide'  | <b>√</b>     | <b>√</b>  |          | <b>√</b> | <b>√</b> | <b>√</b> |
| fig.show='hide' | <b>√</b>     | <b>√</b>  | <b>√</b> |          | <b>√</b> | <b>√</b> |
| message=false   | <b>√</b>     | <b>√</b>  | <b>√</b> | <b>√</b> |          | <b>√</b> |
| warning=false   | <b>√</b>     | <b>√</b>  | <b>√</b> | <b>√</b> | <b>√</b> |          |

Chunks have optional arguments:



#### Output from .Rmd

- Common file format outputs:
  - .pdf: need access to a LaTex compiler, such as MikTex or TexWorks.
  - .doc: helpful for reports in Microsoft Word.
  - .rft: rich text format can also be used.
  - github\_document: helpful for sharing code, analysis, & prose on the net.
- You can set global options for the .Rmd file: \\[ \text{r setup, include=FALSE} \\ \text{knitr::opts\_chunk\$set(echo = TRUE)} \]
- When sharing with decision-makers, use echo=FALSE.
- For sharing .html, you can hide code by default, and make it accessible by a mouse click. Use code folding: hide in header.
- Can also do inline code- e.g. The total of v1 is `r sum(v1)` The total of v1 is 55



#### Other .Rmd outputs

- R Notebook like a lab notebook, just for R tasks.
  - .html document: communicate with decision-makers
  - .html notebook: collaborate with data scientists and yourself.
  - Unlike .html document, .html notebook will show full source code.
  - Can be viewed in browser or R-studio.
- Presentations less visual control than powerpoint but easier to transfer data science commands.
  - New slides starts at # header or ## subheader
  - Horizontal line with \*\*\*
  - Can make two types of html presentations or pdf presentation via beamer.



#### Tidyverse

- Will use the tidyverse package throughout the next few modules.
  - Use *install.packages("tidyverse")*  $\gg$  first time only
  - Load by library(tidyverse) severytime

```
— Conflicts
x dplyr::filter() masks stats::filter()
x dplyr::lag() masks stats::lag()
```

- What does this conflict mean?
  - Base R has a stats package where it has the functions filter() and lag().
  - The tidyverse package has the same name functions. So it overwrites it.
  - Not to worry, the tidyverse versions do the same stuff and more...



# ggplot2 package

- R has many plotting functions and packages, but ggplot2 package is very elegant yet powerful.
- It is built into the tidyverse package, so you will need to install it or load it separately.
- Throughout this module let us use another mileage data that's built into ggplot2 package. To load: data("mpg") and print(mpg).

```
> print(mpg)
# A tibble: 234 x 11
   manufacturer model
                           displ year
                                          cyl trans
                                                         drv
                                                                  cty
                                                                        hwy fl
                                                                                  class
   <chr>
                <chr>>
                            <dbl> <int> <int> <chr>
                                                          <chr> <int> <int> <chr> <chr>
                                  1999
                                            4 auto(15)
                                                                   18
 1 audi
                             1.8
                                                                         29 p
                                                                                  compact
                             1.8
                                  1999
                                            4 manual(m5) f
                                                                   21
                                                                         29 p
 2 audi
                                                                                  compact
 3 audi
                                   2008
                                            4 manual(m6) f
                                                                         31 p
                                                                                  compact
                                   2008
                                            4 auto(av)
                                                                   21
                                                                         30 p
 4 audi
                a4
                                                                                  compact
 5 audi
                a4
                             2.8
                                  1999
                                            6 auto(15)
                                                                   16
                                                                         26 p
                                                                                  compact
                             2.8
                                  1999
                                            6 manual(m5) f
                                                                   18
 6 audi
                                                                         26 p
                                                                                  compact
                                   2008
                                            6 auto(av)
                                                                   18
 7 audi
                a4
                              3.1
                                                                         27 p
                                                                                  compact
                a4 quattro
                             1.8
                                  1999
                                            4 manual(m5) 4
                                                                   18
 8 audi
                                                                         26 p
                                                                                  compact
                             1.8
                                  1999
                                            4 auto(15)
                                                                   16
 9 audi
                a4 quattro
                                                                         25 p
                                                                                  compact
                                            4 manual(m6) 4
10 audi
                a4 quattro
                                   2008
                                                                   20
                                                                         28 p
                                                                                  compact
# ... with 224 more rows
```

?mpg to find out more details about variables.

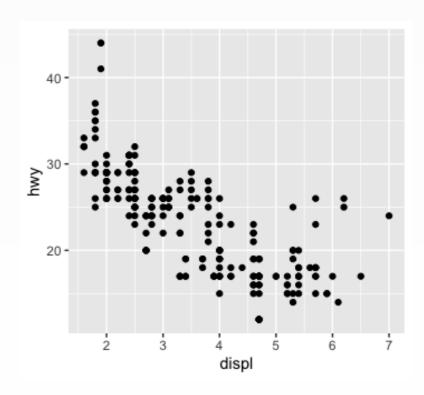


# Creating a ggplot

- Question: Do cars with bigger engines use more gas than cars with smaller engines?
- Let us plot hwy (miles per gallon on the highway) against displ (car's engine size, in liters).

```
> ggplot(data = mpg) +
+     geom_point(mapping = aes(x = displ, y = hwy))
```

- As expected, we see a negative relationship.
- Cars with bigger engines have lower mpg.



# ggplot()

- To plot with ggplot2, you start with the function *ggplot()*, which creates a coordinate system for the plot.
  - If you try this, it'll just be a blank canvas.
- Then, the first argument is the data. Here, we used the mpg data.
  - Even when you add the data argument, the plot remains blank.

```
> ggplot(data = mpg) +
+    geom_point(mapping = aes(x = displ, y = hwy))
```

- Then, you add layers to the plot using +.
  - Note that the + must be added to the end of the line if the code is being broken into multiple lines.
- Then *geom* functions controls the type of plot. Many geom functions!
  - Here, *geom\_point()* adds a layer of points making it a scatterplot.
  - Geom functions take mapping arguments that defines how to map the data to visuals.



# ggplot() (cont.)

The basic template of ggplot() is

The mapping argument uses the aesthetic function aes(), and the x and y arguments of aes() specifies which variable goes on x-axis and y-axis.

```
> ggplot(data = mpg) +
+    geom_point(mapping = aes(x = displ, y = hwy))
```

- In our first example, we plotted the engine size on the x-axis and mileage on the y-axis.
- You can also add a 3<sup>rd</sup> factor variable to a 2D scatterplot by using aes().
  - For e.g., Color the observations by class of cars

```
> levels(as.factor(mpg$class))
[1] "2seater"  "compact"  "midsize"  "minivan"  "pickup"  "subcompact" "suv"
> unique(mpg$class)
[1] "compact"  "midsize"  "suv"  "2seater"  "minivan"  "pickup"  "subcompact"
```

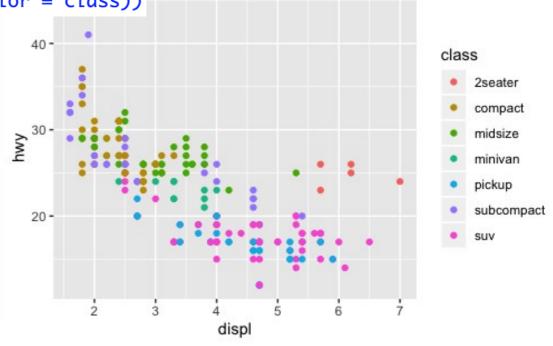


#### **Aesthetics**

- aes() includes visual properties like size, shape, or color of points.
- So to color the observations by class of car -

```
> ggplot(data = mpg) +
+    geom_point(mapping = aes(x = displ, y = hwy, color = class))
```

- *ggplot()* will assign unique properties to the arguments level of the factor variable.
- For e.g. different colors are assigned to the 7 levels of class variable.
- ggplot() will also add a legend.



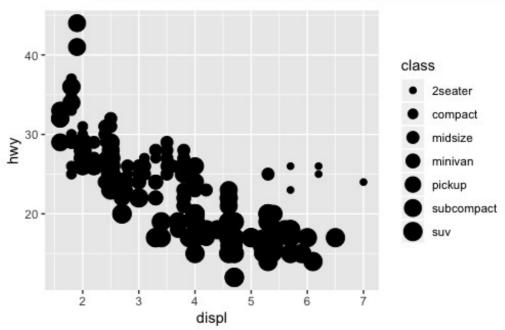


#### Aesthetics (cont.)

You can also change size of the points

```
> ggplot(data = mpg) +
+     geom_point(mapping = aes(x = displ, y = hwy, size = class))
Warning message:
Using size for a discrete variable is not advised.
```

- The warning here shows that we really should not map an unordered variable to an ordered aesthetic.
- Instead, we could use the number of cylinders, for example.





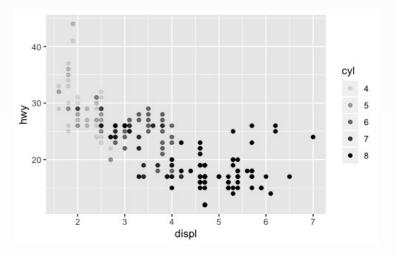
# Aesthetics (cont..)

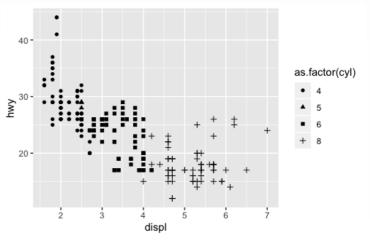
• aes() also has an alpha argument that maps to opacity of the

- Like size, it is better to use ordered numbers for alpha, so I used cyl.
- The argument *shape* controls the type of symbols used as

```
> ggplot(data = mpg) +
+     geom_point(mapping = aes(x = displ, y = hwy, shape = as.factor(cyl)))
```

- ggplot() only can plot 6 shapes at a time.
  - Additional groups will <u>not</u> be plotted. You can see this if you do shape = class.
- shape only accepts categorical variables.
  - You'll see the error if you don't use as.factor().







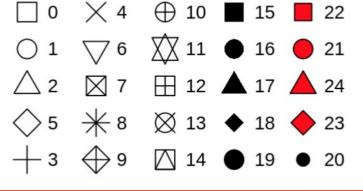
#### Aesthetics (cont...)

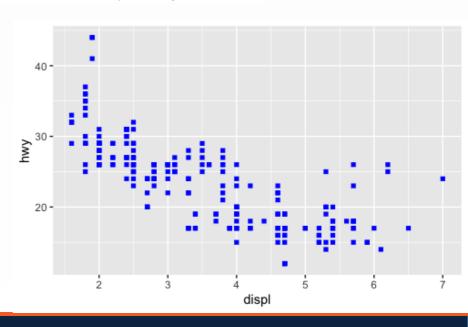
- You can also change the aesthetics of the entire *geom* (plot), manually.
- To do so, place the aesthetic argument outside of aes().
- For e.g. if you wanted all the points to be blue squares.

```
> ggplot(data = mpg) +
+    geom_point(mapping = aes(x = displ, y = hwy), color = "blue", shape = 15)
```

#### Note that

- Name of color is a character string.
- Size of the symbol is in mm.
- Shape of symbol is a number.





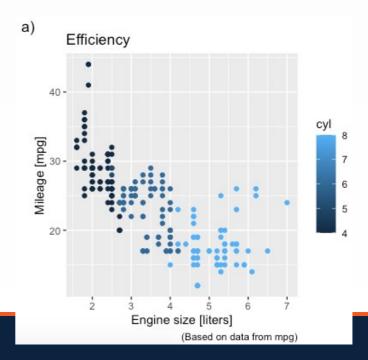


#### Aesthetics (cont....)

- The labs() function allows you to change the default labels given by ggpot2.
- Use labs(x = "string", y = "string") to assigned new axis labels.

```
> ggplot(data = mpg) +
+ geom_point(mapping = aes(x = displ, y = hwy, color = cyl)) +
+ labs(x = "Engine size [liters]", y = "Mileage [mpg]", title = "Efficiency", caption = "(Based on data from mpg)", tag = "a)")
```

Arguments like *title*, *caption*, and *tag* are all useful for making descriptive plots.



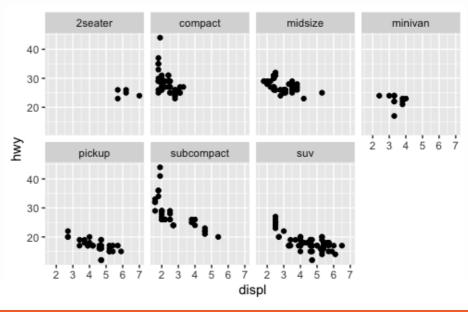


#### **Facets**

- We can also make subplots within a plot like a matrix of subplots.
- To make subplot based on using a factor variable use facet\_wrap().
- The first argument is a formula this is a data structure in R not an "equation".
  - A formula structure is created using a tilde followed by a variable.

```
> ggplot(data = mpg) +
+     geom_point(mapping = aes(x = displ, y = hwy)) +
+     facet_wrap(~ class, nrow = 2)
```

- You can specify the number of rows using nrow argument.
- The variable to pass to *facet\_wrap()* should not be continuous.



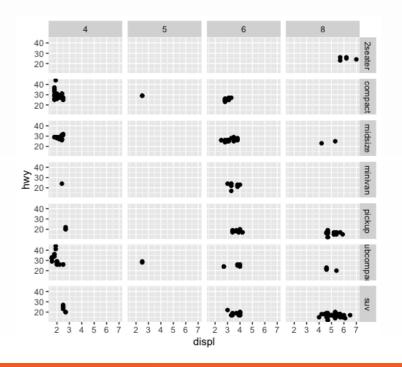


### Facets (cont.)

You can use facet\_grid() to facet using two variable.

```
> ggplot(data = mpg) +
+     geom_point(mapping = aes(x = displ, y = hwy)) +
+     facet_grid(class ~ cyl)
```

- The first argument is also a formula, except with two variables.
- Unlike facet\_wrap(), facet\_grid() requires two variables separated by .
  - Format: rows variable column variable.





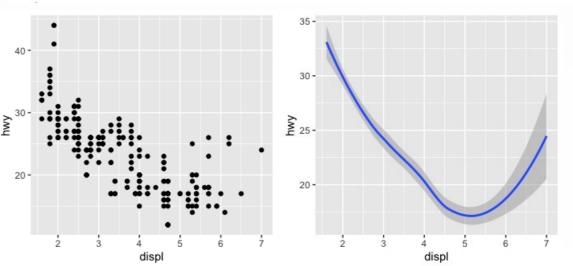
#### Geoms

- Geom is a geometrical object that the plot uses to represent the data.
- A scatter plot uses a point geom. Typically, the names are associated
  - Bar chart uses a bar geom
  - Line chart uses a line geom
  - Boxplots use a boxplot geom
  - There are many others...

This scatterplot can be converted to a smoothed line plot by using *geom\_smooth()*.

Not every aes() works with every geom - for e.g., you can set the shape of a point but not a line.

```
> ggplot(data = mpg) +
+    geom_smooth(mapping = aes(x = displ, y = hwy))
`geom_smooth()` using method = 'loess' and formula 'y ~ x'
```





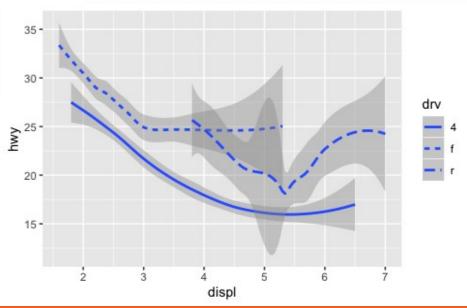
### geom\_smooth()

- The linetype argument within geom\_smooth() plots a different line with a different linetype for every level of the variable used.
- For e.g., if we want to separate lines by 4wd, front-, or rear-wheel drive.

```
> ggplot(data = mpg) +
+    geom_smooth(mapping = aes(x = displ, y = hwy, linetype = drv))
```

- There are over 40 geoms built-in to ggplot2.
- There are additional geoms available by external packages <u>https://www.ggplot2-exts.org</u>
- Best way to get help

R-Studio > Help > Cheatsheets > Data Visualization with ggplot2.



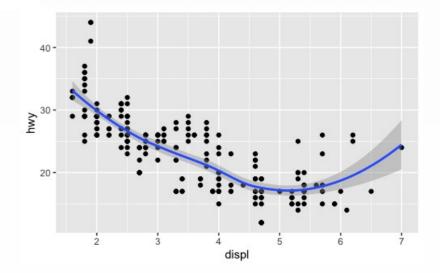


#### Multiple geoms

You can add multiple geoms to the same plot. This is handy when you want to see the actual
observation and the trend line over it.

```
> ggplot(data = mpg) +
+     geom_point(mapping = aes(x = displ, y = hwy)) +
+     geom_smooth(mapping = aes(x = displ, y = hwy))
```

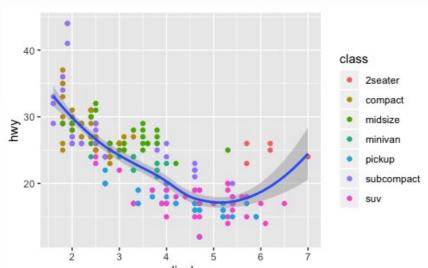
- Do you see any issues with the above code code duplication!
- We can place the *aes()* mapping outside the *geom* as global aesthetics.

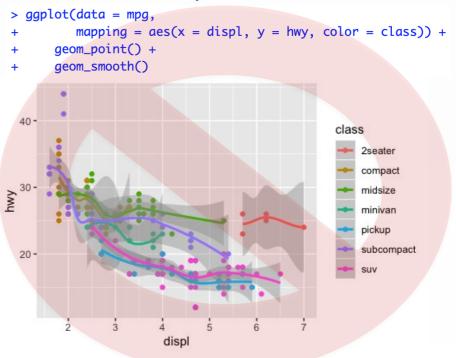




### Multiple geoms (cont.)

- You can also override the global aesthetic mappings by placing local aesthetic mappings inside geoms. That mapping will work on that layer only.
- For e.g. if we want to color the scatter plot by class, but not the lineplot.

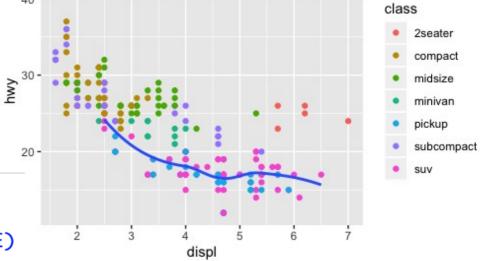






# Multiple geoms (cont..)

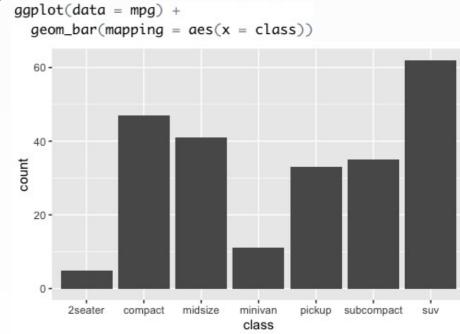
- You can also specify different data sets for different geoms.
- For e.g., if you wanted to draw the smoothed line for only SUVs but wanted to see the data points for the entire data.



- The local data argument overrides the global mpg data.
  - filter() extracts the suv class.
  - se = FALSE argument removes the standard error shading.

# geom\_bar()

- Bar charts are commonly used for representing a distribution of data – geom\_bar().
- We want to see the distribution of cars across class.
- Notice that the y-axis is count this is a new computed value from the raw data.
- geom\_bar() counts the frequency of each class and uses this on the y-axis.
  - Bar charts, histograms, and frequency plots computes counts and plots bins of counts.
  - Smoothing plots fit a model and then plots fitted values.
  - Boxplots computes summaries and plots the box.



- The default transformations for each of these geoms can be found in help under argument stat
- For e.g. see ?geom\_bar, ? geom\_abline, or ?geom\_boxplot



#### Default geom and stat

Each geometric object can also be made using its stat counterpart.

| Geom           | Description                                                           | Default Stat    |
|----------------|-----------------------------------------------------------------------|-----------------|
| geom_bar()     | Bar chart                                                             | stat_bin()      |
| geom_point()   | Scatterplot                                                           | stat_identity() |
| geom_line()    | Line diagram, connecting observations in order by $\mathbf{x}$ -value | stat_identity() |
| geom_boxplot   | Box-and-whisker plot                                                  | stat_boxplot()  |
| geom_path      | Line diagram, connecting observations in original order               | stat_identity() |
| geom_smooth    | Add a smoothed conditioned mean                                       | stat_smooth()   |
| geom_histogram | An alias for geom_bar() and stat_bin()                                | stat_bin()      |



#### When to Override Default stat

- Suppose we wanted to show the proportions on the y-axis.
- For e.g., create a data frame about diamond cuts called demo.

```
20000 -
> demo <- tribble(</pre>
      ~cut.
                      ~frea.
                                       15000 -
      "Fair",
                      1610,
      "Good",
                 4906,
                                     ted 10000 -
      "Very Good", 12082,
      "Premium",
                      13791,
                                       5000 -
       "Ideal",
                       21551
+ )
                                                     Good
                                                                           Very Good
                                                                    Premium
> gaplot(data = demo) +
      geom\_bar(mapping = aes(x = cut, y = freq), stat = "identity")
```

• Using stat = "identity" allows me to plot the summarized values directly.

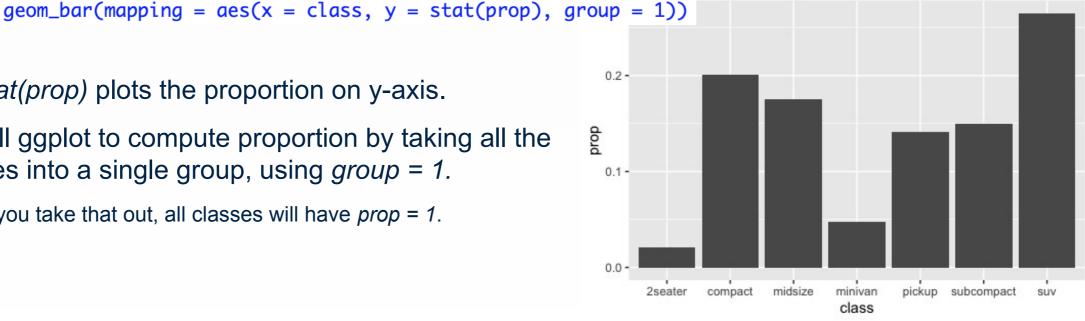


> ggplot(data = mpg) +

#### When to Override Default stat (cont.)

- Now on the y-axis, if we want to show proportions instead of frequency.
- We can use the mpg data based on class.

- y = stat(prop) plots the proportion on y-axis.
- We tell ggplot to compute proportion by taking all the classes into a single group, using group = 1.
  - If you take that out, all classes will have prop = 1.



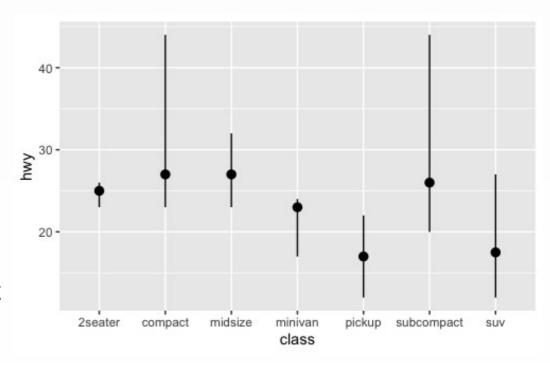


#### When to Override Default stat (cont..)

- Or else, maybe we want to plot summary statistics from the data.
  - Use *stat\_summary()* summarizes *y* values for each *x* value.

```
> ggplot(data = mpg) +
+     stat_summary(
+         mapping = aes(x = class, y = hwy),
+         fun.ymin = min,
+         fun.ymax = max,
+         fun.y = median
+     )
```

• ggplot() provides over 20 stat functions. You can get help for each using ?, for e.g. ?stat\_bin.

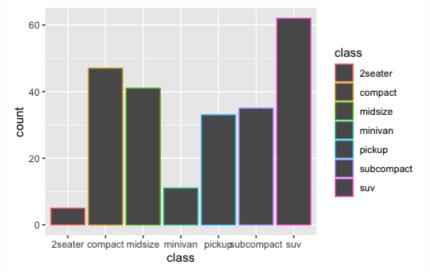




### geom\_bar() (cont.)

You can also color bar charts using color or fill arguments.

```
> ggplot(data = mpg) +
+    geom_bar(mapping = aes(x = class, colour = class))
```



```
> ggplot(data = mpg) +

+ geom_bar(mapping = aes(x = class, fill = class))

class
2seater
compact
midsize
minivan
pickup
subcompact
suv

class
```

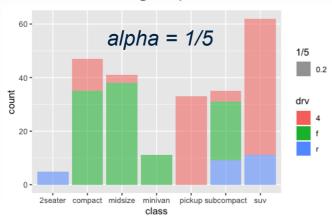


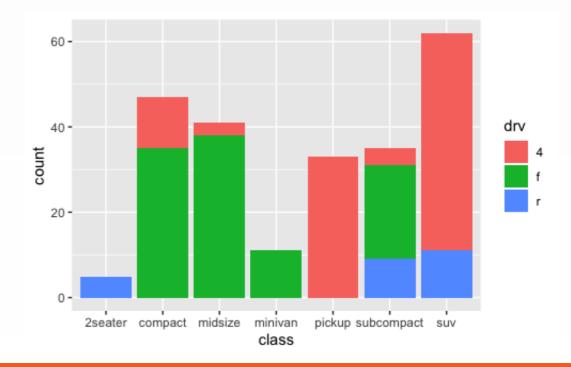
# geom\_bar() (cont..)

- If you change the fill variable to something other than the x variable, you can see the distribution within each bar.
- For e.g. see the distribution of drv within each class

```
> ggplot(data = mpg) +
+    geom_bar(mapping = aes(x = class, fill = drv))
```

• You can also control the transparency of the bars using *alpha* inside *aes()*.





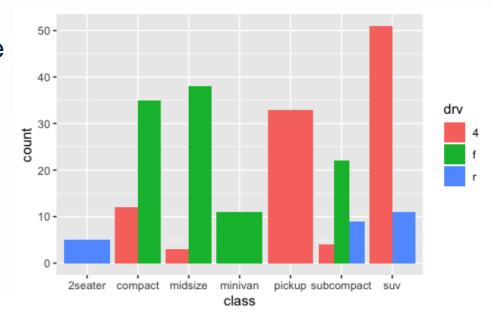


#### Unstacked Bar Chart

- If you don't want stacked bar chart, but rather next to each other.
- Use position = "dodge"

```
> ggplot(data = mpg) +
+ geom_bar(mapping = aes(x = class, fill = drv), position = "dodge")
```

 Note that the position argument is outside aes() but inside geom\_bar().



### geom\_histogram()

- Another popular type of plot used in statistical analysis are histograms. They show the distribution of the data.
- In geom\_histogram(), you can specify the binwidth to getter a better understanding of the distribution of the data.

```
> ggplot(data=mpg) +
+    geom_histogram(binwidth = 2, mapping = aes(x = hwy))
```

- Do install.packages("gridExtra") and load it makes multiple plots on a grid easily.
- You can assign plots to objects and plot multiple objects on a grid.

20

hwy

20

hwy

```
> plot1 <- ggplot(data=mpg) +</pre>
      geom_histogram(binwidth = 0.5, mapping = aes(x = hwy)) +
      labs(title = "Binwidth = 0.5")
> plot2 <- ggplot(data=mpg) +</pre>
      geom_histogram(binwidth = 1, mapping = aes(x = hwy)) +
      labs(title = "Binwidth = 1")
> plot3 <- ggplot(data=mpg) +</pre>
      geom_histogram(binwidth = 2, mapping = aes(x = hwy)) +
      labs(title = "Binwidth = 2")
> plot4 <- ggplot(data=mpg) +</pre>
      geom_histogram(binwidth = 3, mapping = aes(x = hwy)) +
      labs(title = "Binwidth = 3")
                                                                                  Binwidth = 2
                                                                                                     Binwidth = 3
> grid.arrange(plot1, plot2, plot3, plot4, ncol=4)
                                                                                 30 -
                                                              20 -
                                                             count
                                                                               tun oo 20 -
                                                                                 10 -
```

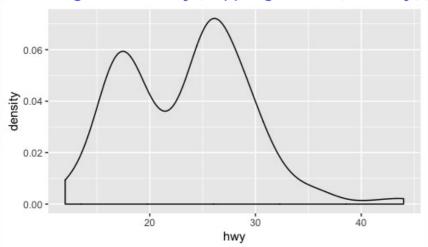
hwy



### geom\_density() and geom\_segment()

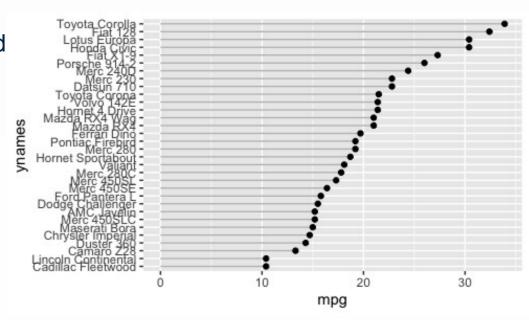
A smoothed histogram can be plotted using a density plot.

```
> ggplot(data=mpg) +
+    geom_density(mapping = aes(x = hwy))
```



```
> mtcars %>%
+    mutate(carnames = rownames(mtcars)) %>%
+    arrange(mpg) %>%
+    mutate(ynames = factor(carnames, levels = carnames)) %>%
+    ggplot(aes(x = mpg, y = ynames)) +
+    geom_segment(aes(x = 0, y = ynames, xend = mpg, yend = ynames), color = "grey") +
+    geom_point()
```

- Sometimes, we want to see a hybrid between bar chart and scatterplot.
- Plot mtcars data sorted based on mpg, and then all the cars plotted along with their values.

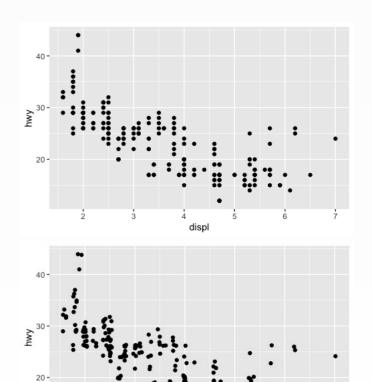




#### Jittered Scatterplot

- Often, observations overlap each other on the plot.
  - For e.g., see the first scatterplot we made.
  - This plot shows 126 points even though there are 234 observations.
  - A lot of overlap: problem known as overplotting!
- The argument *position* = "jitter" overcomes this by slightly moving overlapping observations.

• Less accurate in small scale but reveals better insights about the data in the big picture.

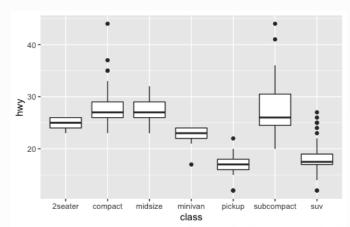


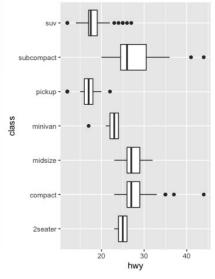


#### Coordinate System

- By default, Cartesian coordinates.
- coord\_flip() switches the x and y axes.
- Suppose we made a boxplot of highway mileage across the classes.

 Then, we wanted to switch this into a horizonal boxplot.

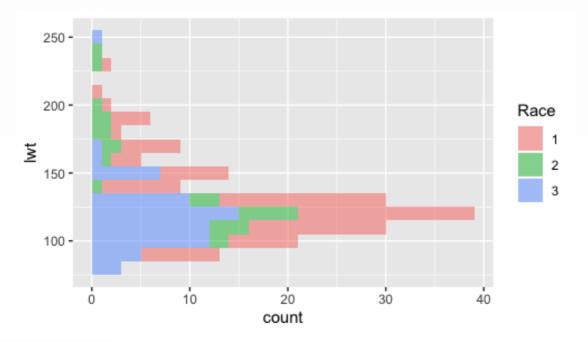




#### Examples

Install the MASS package and load the "birthwt" data. Do ?birthwt for more details.

- Make the plot shown below.
- 2. Transparency is set of 50%, and histogram uses binwidth of 10.



Hints: to change legend title: scale\_fill\_discrete(name="Race")

If you're getting gradient coloring, think about the class of data.



# Examples (cont.)

- Reproduce the plot below. Hint remember facet\_wrap() and use binwidth = 10!
- Again, make sure the class of variables are correct.

