CS&SS 321 - Data Science and Statistics for Social Sciences

Module II - Data management and exploratory visual analysis

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Module II

- ► This model will equip students with essential data science skills in R.
- ▶ In the next quiz sections, we will cover the following topics:
 - ▶ Data frames, logical relations, and subsetting.
 - ► Quantile and NA data.
 - Base R graphics.
 - ▶ Pivoting and merging data.
 - ► Introduction to ggplot2.

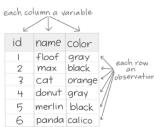
▶ Think about *data* in terms of **data** *frame*.

TIDY DATA is a standard way of mapping the meaning of a dataset to its structure.

-HADLEY WICKHAM

In tidy data:

- each variable forms a column
- each observation forms a row
- each cell is a single measurement



Wickham, H. (2014). Tidy Data. Journal of Statistical Software 59 (10). DOI: 10.18637/jss.v059.i10

- ► A data frame is a special type of object in R that can store multiple vectors of data.
- ► We can create data frames using the function data.frame().

```
# vectors with student's names and grades
student <- c("Alice", "Bob", "Charlie", "Sean", "Brandy")</pre>
grades_M \leftarrow c(76, 82, 94, 45, 75)
grades_F \leftarrow c(82, 90, 89, NA, 64)
# create a df with grades
(df_new <- data.frame(student,grades_M,grades_F))</pre>
##
    student grades_M grades_F
## 1
    Alice
                  76
                           82
## 2 Bob
                 82 90
## 3 Charlie 94 89
## 4
       Sean
             45
                          NΑ
             75
```

64

5 Brandy

We can create data frames by directly writing the vectors/columns as separate elements within the data.frame() function:

```
##
    student grades_M grades_F
## 1
      Alice
                76
                         82
## 2
       Roh
                82
                         90
## 3 Charlie 94
                        89
## 4
       Sean
              45
                         NΑ
## 5 Brandy
                75
                         64
```

► To select a specific column from a data frame, use the \$ operator followed by the *name* of the column.

```
df_new$grades_M
```

```
## [1] 76 82 94 45 75
```

- ➤ To select specific rows and/or columns from a data frame, we use brackets [].
- ► If the object is a single vector, we use a single numeric value in the brackets to select an element within the vector.

```
# select element 2 from vector grade_M:
grades_M[2]
```

```
## [1] 82
```

- ▶ If the object is a matrix or data frame, we can select elements by their row and column positions.
 - ▶ Note: we input two different values separated by a comma to select the row and column

```
# select row 2 from object df:
df_{new}[2,]
##
    student grades_M grades_F
## 2
         Rob
                   82
                             90
# select column 2 from object df:
df new[,2]
## [1] 76 82 94 45 75
# select element in row 2 and column 2:
df new[2,2]
```

We can also use **characters** to select columns by their names, for example:

```
# select column name "grade M" from object df:
df new[,c("grades M")]
## [1] 76 82 94 45 75
# select columns name "student" and "grade M":
df_new[,c("student","grades_M")]
##
    student grades_M
## 1
    Alice
                76
    Bob 82
## 2
## 3 Charlie 94
           45
## 4 Sean
## 5 Brandy
           75
```

tibbles are data frames too!

- ► Another type of data frame are **tibbles**.
 - ▶ tibble() is a fancy version of data.frame().
 - ► All dplyr functions provide outputs as_tibbles.

```
as tibble(df new); class(as tibble(df new))
## # A tibble: 5 x 3
## student grades_M grades_F
## <chr> <dbl>
                      <dbl>
## 1 Alice
                76
                        82
                82
## 2 Rob
                        90
## 3 Charlie 94
                        89
## 4 Sean
              45
                        NΑ
                75
## 5 Brandy
                     64
## [1] "tbl df"
                 "tbl"
                             "data.frame"
```

Logical relations

► Logical Data Class:

- ► Represents binary values: TRUE or FALSE.
- ► Can be transformed into numeric form: TRUE becomes 1, and FALSE becomes 0.
- Useful for relational analyses and evaluating proportions of TRUE within a vector using the mean() function.
- Used to set conditional tests; useful for subsetting or create new variables.

```
3 + 5 < 10 # is 3 + 5 less than 10?
```

[1] TRUE

Logical relations

```
# select column name "grade M" from object df:
df new$grades M
## [1] 76 82 94 45 75
# Is each value greater or equal to 80?
df_new$grades_M >= 80 # the condition ">= 80" sets a logical tes
## [1] FALSE TRUE TRUE FALSE FALSE
# What proportion of TRUEs are in this vector?
mean(df_new$grades_M >= 80) # `TRUE` == 1, and `FALSE` == 0
## [1] 0.4
```

Subsetting: ifelse().

- ► We can use the ifelse() function to create new variables based on *conditions* from other variables.
 - 1 We set a *logical test* that evaluates to TRUE or FALSE.
 - 2 We specify what value to assign if the test is TRUE, and a different value if the test is FALSE.

```
# if test is TRUE, then "pass", otherwise, then "fail"
df_new$midterm <- ifelse(df_new$grades_M > 60, "pass", "fail")
df_new
```

```
##
     student grades_M grades_F midterm
## 1
       Alice
                    76
                              82
                                     pass
## 2
         Rob
                    82
                              90
                                     pass
## 3 Charlie
                              89
                    94
                                     pass
## 4
        Sean
                    45
                              NA
                                     fail
## 5
      Brandy
                    75
                              64
                                     pass
```

Subsetting: Base R.

► We can use *logical tests* in **vectors** within the **row element** of an object x[test ,] to subset those cases that are TRUE.

```
# In the vector midterm, what values are "pass"?
df_new$midterm=="pass"
## [1] TRUE TRUE TRUE FALSE TRUE
# subset those rows where this test is TRUE
df new[ df new$midterm=="pass" , ]
##
    student grades_M grades_F midterm
## 1
     Alice
                 76
                         82
                               pass
## 2
        Bob
            82
                         90
                               pass
## 3 Charlie
             94
                         89
                               pass
             75
## 5 Brandv
                         64
                               pass
```

Subsetting: subset()/filter().

- ➤ To subset data, we can use the functions subset() or filter().
 - ► The subset() function is part of base R, while filter() is a function from the dplyr package.
 - ► If you plan to use filter(), you need to load the tidyverse or dplyr package first.

```
# subset the df into a new one with final exam grades of above 85
subset(df new, grades F > 85)
##
     student grades M grades F midterm
        Bob
                   82
## 2
                            90
                                  pass
## 3 Charlie
                   94
                            89
                                  pass
filter(df_new, grades_F > 85) # from dplyr package
     student grades_M grades_F midterm
##
## 1
        Bob
                   82
                            90
                                  pass
## 2 Charlie
                   94
                            89
                                  pass
```

► An initial step in data science project analysis is to examine the NA values.

dat

```
##
      name age gender score
                 F
## 1
     Alice 20
                      85
       Bob 30 M
                      62
## 2
## 3 Charlie NA M
                     75
## 4
      Dave 28
                 Μ
                   80
                 F
## 5
    Eve 22
                   95
                  F
## 6
     Marta 21
                      NA
```

► The function is.na() will return a vector of logical values

```
is.na(dat)
##
        name age gender score
## [1,] FALSE FALSE FALSE FALSE
## [2,] FALSE FALSE FALSE FALSE
## [3,] FALSE TRUE FALSE FALSE
## [4,] FALSE FALSE FALSE FALSE
## [5,] FALSE FALSE FALSE FALSE
## [6.] FALSE FALSE FALSE TRUE
mean(is.na(dat))
```

[1] 0.08333333

- Several packages have functions to assists the analysis of NA values.
 - ▶ function freq.na() from package questionr is an example:

```
library(questionr)
freq.na(dat)
```

```
## age 1 17
## score 1 17
## name 0 0
## gender 0 0
```

► We already know that some functions have the argument na.rm, but this is not the norm.

```
dat$score
## [1] 85 62 75 80 95 NA
mean(dat$score)
## [1] NA
mean(dat$score, na.rm = TRUE)
## [1] 79.4
```

► The na.omit() function in base R removes all rows with any NA value.

```
dat
##
       name age gender score
                     F
## 1
     Alice
             20
                          85
                         62
## 2
        Bob 30
                     М
## 3 Charlie NA
                         75
## 4
       Dave 28
                       80
## 5 Eve 22
                         95
## 6 Marta 21
                     F
                          NΑ
na.omit(dat)
```

```
## name age gender score
## 1 Alice 20 F 85
## 2 Bob 30 M 62
```

► The drop_na() function from dplyr removes all rows with any NA value of a specific column.

```
drop_na(dat, score)
##
     name age gender score
    Alice 20
                  F
## 1
                      85
       Bob 30 M 62
## 2
## 3 Charlie NA M 75
      Dave 28 M 80
## 4
## 5
    Eve 22
                    95
drop_na(dat, age)
##
    name age gender score
## 1 Alice
          20
                     85
## 2
     Bob
          30 M 62
## 3
         28 M
                  80
    Dave
## 4
     Eve
          22
                     95
                     NΑ
## 5 Marta
```

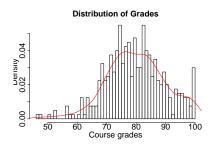
► We can use ifelse() function to substitute NA values.

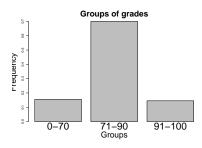
```
## name age gender score
## 1 Alice 20 F 85
## 2 Bob 30 M 62
## 3 Charlie NA M 75
## 4 Dave 28 M 80
## 5 Eve 22 F 95
## 6 Marta 21 F 0
```

Distributions

- ► A distribution describes how variable values are spread across possible outcomes.
 - A probability distribution represents the likelihood of specific outcomes.
 - ► A **frequency** distribution summarizes counts of **distinct** values or ranges in dataset.
- ► Continuous vs. Discrete Distributions:
 - ► Continuous distributions involve numerical variables that can take any value within a range (e.g., height, weight), while
 - ▶ **Discrete** distributions involve variables that take distinct, separate values (e.g., number of cars, number of people).

Continuous vs. Discrete Distributions





Data Generating Process

- ▶ A Data Generating Process (DGP) refers to the hypothetical or real mechanism that generates a dataset.
 - ► It is a conceptual model that describes **how** the observed data is generated or produced.
- ▶ **Distributions** represent **systematic behavior** (aka, DGP).
- ► When looking at a distributions:
 - ► think in terms of a **DGP**, and
 - ▶ how the data was generated.

Data Generating Process

► Two very useful pieces of information from a DGP are its **mean** and **standard deviation**.

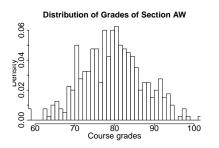
$$\bar{X} = \frac{1}{n} \sum_{i=1}^{n} X_i$$
; $S = \sqrt{\frac{1}{n-1} \sum_{i=1}^{n} (X_i - \bar{X})^2}$

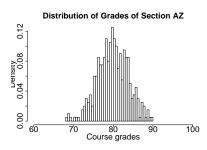
where

- $ightharpoonup \bar{X}$ represents the sample mean.
- ightharpoonup n is the number of **observations** in the sample.
- $ightharpoonup X_i$ represents **values** from a variable in the sample.
- ► *S* represents the **sample standard deviation**.

Data Generating Process: standard deviation

► The **standard deviation** gives us information about how spread is the data around the mean.





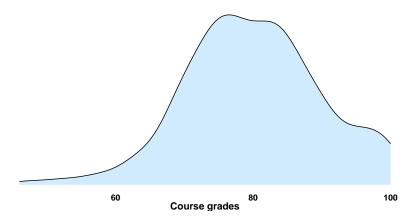
Reporting distributions

- ► When analyzing data, always report **descriptive statistics**.
 - ▶ Mean.
 - ► Median.
 - ► Standard deviation.
 - ► Minimum.
 - ▶ Maximum.
 - Quartiles.
- ► Note:
 - ► When comparing distributions of the same quantities, use the **median** instead of the **mean** as the reference point. Why?

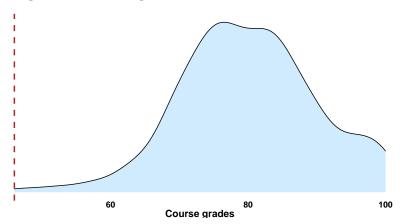
► The quantile function in R can be used to calculate the values that separate a distribution into different quantiles.

```
quantile(df$grades)
##
      0% 25% 50% 75% 100%
   46.00 74.00 80.00 86.25 100.00
##
quantile(df$grades, probs = c(0.25, 0.5, 0.75))
##
    25% 50% 75%
## 74.00 80.00 86.25
summary(df$grades)
##
     Min. 1st Qu. Median Mean 3rd Qu. Max.
    46.00
           74.00 80.00 79.98
                                 86.25 100.00
##
```

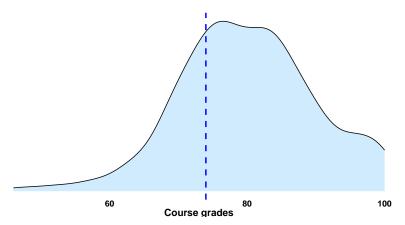
- ► Visualizing quantiles.
- ▶ Use the argument probs to specify segments of the data.



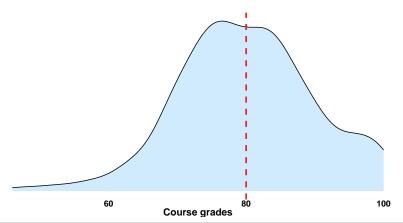
- ► Visualizing quantiles: **minimum**.
- ► quantile(df\$x, probs = 0)



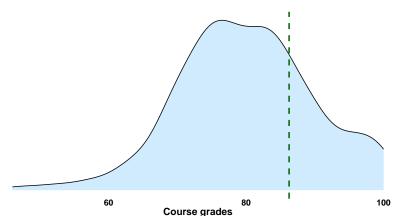
- ► Visualizing quantiles: 1st Quartile (Q1) or 25th Percentile.
- ► quantile(df\$x, probs = 0.25)



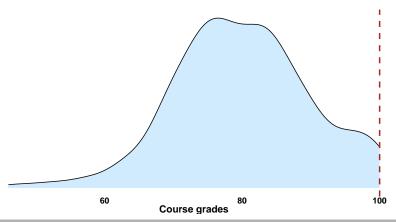
- ► Visualizing quantiles: 2st Quartile (Q2) or 50th Percentile or median or 5th Decile.
- ► quantile(df\$x, probs = 0.5)



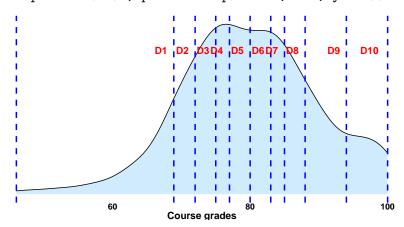
- ► Visualizing quantiles: **3st Quartile (Q3)** or **75th Percentile**.
- ► quantile(df\$x, probs = 0.75)



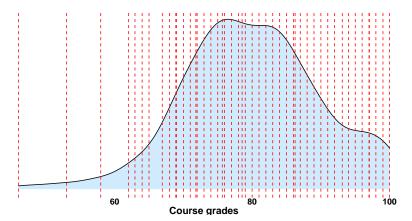
- ► Visualizaing quantiles: maximum or 100th percentile or 10th decile.
- ▶ quantile(df\$x, probs = 1)



- ► Visualizing quantiles: **deciles** (1-10).
- ▶ quantile(df\$x, probs = seq(from=0,to=1,by=0.1))

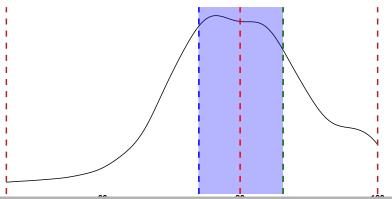


- ► Visualizing quantiles: **percentiles** (1-100).
- ▶ quantile(df\$x, probs = seq(from=0,to=1,by=0.01))



quantile and data distribution.

- ► The **interquartile range** (IQR) is a measure of variability that represents the difference between the **first** and the **third** quartiles.
- ▶ It provides information about the spread of the middle 50% of the data.



► To create a new discrete variable, letter, with three levels (C, B, and A) based on exam scores, consider using ifelse.

```
##
      name age gender score letter
## 1
   Alice 20
            F 85 Otherwise
## 2 Bob 30 M 62
            M 75 Otherwise
## 3 Charlie NA
## 4
   Dave 28
            M 80 Otherwise
   Eve 22
            F
## 5
                    95 Otherwise
## 6
     Marta 21
                F
```

However, note that ifelse yields binary results determined by the conditional test's TRUE or FALSE.

```
##
      name age gender score letter
## 1
   Alice 20
            F 85 Otherwise
## 2 Bob 30 M 62 Otherwise
## 3 Charlie NA
            M 75
## 4
   Dave 28
            M 80
   Eve 22
            F 95 Otherwise
## 5
                     O Otherwise
## 6
     Marta 21
```

► Can we do better and use ifelse to map several characters into a vector using conditional tests?

```
##
     name age gender score letter
## 1 Alice 20
            F 85
## 2 Bob 30 M 62 Otherwise
## 3 Charlie NA M 75 Otherwise
## 4
   Dave 28
            M 80 Otherwise
## 5
   Eve 22
            F
                    95
## 6
     Marta 21
                F
                     O Otherwise
```

Yes! ifelse function can be nested on itself for multiple tests.

```
## name age gender score letter
## 1 Alice 20 F 85 A
## 2 Bob 30 M 62 C
## 3 Charlie NA M 75 B
## 4 Dave 28 M 80 B
## 5 Eve 22 F 95 A
## 6 Marta 21 F 0 C
```

More functions: nested case_when.

➤ You can use the case_when function from the dplyr package to produce the same output.

```
## name age gender score letter
## 1 Alice 20 F 85 A
## 2 Bob 30 M 62 C
## 3 Charlie NA M 75 B
## 4 Dave 28 M 80 B
## 5 Eve 22 F 95 A
## 6 Marta 21 F 0 C
```

Data class: factors

- Categorical variables can take on a limited, and usually fixed, number of different values or levels.
 - ► Voted:
 - ► Yes/No
 - ► Political parties:
 - ► Social democrat, Liberals, Conservatives, Green party, etc
 - Likert scales in survey opinions:
 - ► Strongly Agree, Agree, Disagree, Strongly Disagree
- ► However, character data type in R is used to store sequences of characters (text).

Factors

► A factor is a data structure used to represent categorical variables.

```
gender <- c("Male", "Female", "Male", "Female")</pre>
class(gender)
## [1] "character"
gender_factor <- as.factor(gender)</pre>
class(gender_factor)
```

[1] "factor"

Factors: levels

- ► Factors have levels, which are the distinct values that the categorical variable can take.
- ► The levels are determined by the unique values in the original vector.

```
# Checking levels of a factor
levels(gender_factor)
```

```
## [1] "Female" "Male"
```

Factors: Ordering Levels

By default, levels are ordered alphabetically. You can customize the order using the levels argument.

[1] "Male" "Female"

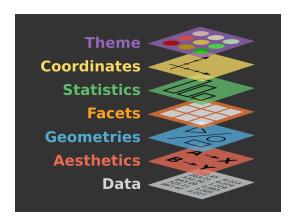
Good practice: create factor variables

- ► Some functions, especially in ggplot2 for visualization, require factors to function properly.
- It is a good practice to create new variables as factors when initiating an analysis.

[1] male female male female male
Levels: male female

Grammar of graphics

► A statistical graphic is a mapping of data variables to aesthetic attributes of geometric objects. (Wilkinson 2005)



Grammar of graphics in ggplot2

- ▶ ggplot2: A *layered* grammer of graphics (Wickham 2009).
 - Build a graphic from multiple layers; each consists of some geometric objects or transformation
 - ► Use + to stack up layers
- What data do you want to visualize?
 - ▶ ggplot(data = ...)
- How are variables mapped to specific aesthetic attributes?
 - ▶ aes(... = ...)
 - positions (x, y), shape, colour, size, fill, alpha, linetype, label...
 - ▶ If the value of an attribute do not vary w.r.t. some variable, don't wrap it within aes(...)
- ▶ Which geometric shapes do you use to represent the data?
 - ▶ geom_{}:
 - geom_point, geom_line, geom_ribbon, geom_polygon, geom_label...

Tidy data

- ► ggplot2 works well only with tidy data
 - ► Tidy data:
 - ► Each variable must have its own column
 - ► Each **observation** must have its own **row**
 - ► Each value must have its own cell

Intro to ggplot

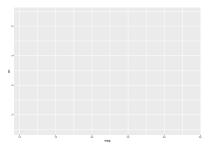
- ► How to create a **scatter plot**: continuous vs. continuous variables
- ► How to create a **boxplot**: continuous vs **categorical** variables

```
summary(mtcars[,c("mpg","wt","cyl")])
```

```
##
                       wt.
                                    cyl
       mpg
   Min. :10.40 Min. :1.513
                                Min. :4.000
##
##
   1st Qu.:15.43
                 1st Qu.:2.581
                                1st Qu.:4.000
##
   Median :19.20
                 Median :3.325
                                Median :6.000
   Mean :20.09 Mean :3.217
##
                                Mean :6.188
                                3rd Qu.:8.000
##
   3rd Qu.:22.80
                 3rd Qu.:3.610
##
   Max. :33.90
                 Max. :5.424
                                Max. :8.000
```

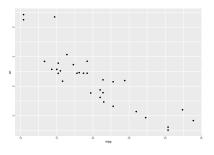
Building a plot from scratch

Step 1: Define a basic ggplot object with x and y aesthetics



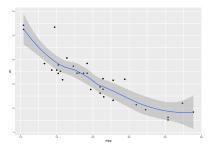
Building a plot from scratch: scatter plot

Step 2: Define a geometric shape



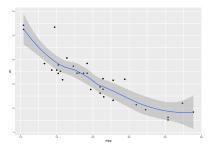
Building a plot from scratch: scatter plot

Note: we are not limited to have a single geometric form,



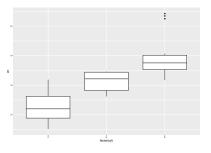
Building a plot from scratch: scatter plot

Note: we are not limited to have a single geometric form,



Building a plot from scratch: boxplot

Note: we are not limited to have a single geometric form,



Grammar of graphics in ggplot2

- ggplot2 is a powerful tool for creating professional visualizations.
- Search on the internet or ask ChatGPT for help with specific plot types using keywords based on geometries, such as line plots, histograms, boxplots, coefficient plots, etc.

- ► **Reshaping** a data frame is a crucial skill in data science that enables you to perform various necessary tasks efficiently.
- ► There are two main types of data structures: **long** and **wide** formats.
- ► Long format is the preferred structure for most R functions and packages, including ggplot2. It is **tidy data** that is easy to manipulate and analyze.
- ► Although not tidy, wide format can be useful for presenting tables to audiences as it conveys more information in a smaller space. However, it is not ideal for data analysis.

long vs wide

country	year	metric	<pre>pivot_wider(names_from = "year",</pre>					
Х	1960	10						
х	1970	13						
х	2010	15		country	yr1960	yr1970	yr2010	
у	1960	20		х	10	13	15	
у	1970	23		у	20	23	25	
у	2010	25		Z	30	33	35	
z	1960	30						
Z	1970	33	◆ pivot_lo	pivot_longer(cols = yr1960:yr2010, names_to = "year",				
Z	2010	35	names_prefix [°] = "yr" values_to = "metric")					

► The pivot_ functions allow you to **reshape** data frames from long to wide or vice versa, which can be useful for data wrangling and visualization purposes.

```
# Create example data
(df <- data.frame(
  id = c(1, 2, 3),
    treatment = c("A", "B", "C"),
  day1 = c(10, 15, 12),
  day2 = c(12, 16, 18),
  day3 = c(8, 14, 10)
))</pre>
```

```
## id treatment day1 day2 day3
## 1 1 A 10 12 8
## 2 2 B 15 16 14
## 3 3 C 12 18 10
```

- pivot_longer() is used to convert a wide data frame to a long format by stacking columns into rows.
- ➤ You must specify which **columns** to pivot, the **names** for the new columns, and the name of the column to store the **values**.

```
## # A tibble: 9 x 4
# Use pivot longer() to reshape
                                                   id treatment day
                                                                       result
# the data from wide to long
                                                <dbl> <chr>
                                          ##
                                                                 <chr>
                                                                        <dbl>
                                          ## 1
                                                    1 A
                                                                 day1
                                                                            10
df_long <-
                                          ## 2
                                                    1 A
                                                                 day2
                                                                            12
  pivot longer(df,
                                          ## 3
                                                    1 A
                                                                 day3
                                                                            8
                cols = starts with("dav")
                                          ## 4
                                                    2 B
                                                                 day1
                                                                            15
                names to = "day",
                                          ## 5
                                                    2 B
                                                                 day2
                                                                            16
                values to = "result")
                                          ## 6
                                                    2 B
                                                                 day3
                                                                            14
df_long
                                                    3 C
                                                                 day1
                                                                            12
                                          ## 7
                                          ## 8
                                                    3 C
                                                                 day2
                                                                            18
                                                    3 C
                                          ## 9
                                                                 day3
                                                                            10
```

while pivot_wider() does the opposite by spreading rows into columns.

pivot_wider() takes similar arguments, but also requires specifying which column to use for the column names and which column to use for the values in the new columns.

```
## # A tibble: 3 x 5
       id treatment
                   day1 day2 day3
##
    <dbl> <chr>
                  <dbl> <dbl> <dbl>
    1 A
## 1
                     10
                          12
                                8
## 2 2 B
                    15
                          16
                               14
## 3 3 C
                     12
                          18
                               10
```