## 1 Lab 3: Data visualization

Data visualizations are graphics that represent quantitative or qualitative data. In PSTAT100 you'll be using the python visualization library Altair, which is built around the pandas dataframe. Altair creates visualizations by mapping columns of a dataframe to the various elements of a graphic: axes, geometric objects, and aesthetics.

Visualizations are immensely useful tools in exploratory analysis as well as presentation, and are thus an essential tool for the data scientist. Visualizations can help an analyst identify and understand structure and patterns in a dataset at a high level and act as a guide for how to proceed with an analysis. Additionally, they can be an extremely effective means for conveying results to a general audience.

Constructing effective visualization is usually an iterative process: plot-think-revise-plot-think-revise. In exploratory visualization often it is useful to produce a large quantity of plots in order to look at data from multiple angles; in this context, speed is helpful and details can be overlooked. By contrast, presentation graphics are typically highly refined versions of one or two exploratory plots that serve as communication tools; developing them involves attention to fine detail.

## 1.0.1 Objectives

In this lab you'll become familiar with the basic functionality of Altair -- that is, the basic kinds of graphics it generates and *how* to construct these graphics from a dataframe -- and get a taste of the process of constructing good graphics.

In general, plots are constructed by:

- 1. creating a *chart*
- 2. specifying marks and encodings
- 3. adding various aesthetics, and
- 4. resolving display issues through customization.

**Technical tutorial**. You'll get an introduction to each of these steps:

- Creating a chart object from a dataframe
- · Encodings: mapping columns to graphical elements
- Marks: geometric objects displayed on a plot (e.g., points, lines, polygons)
- Aesthetics: display attributes of geometric objects (e.g., color, shape, transparency)
- Customization: adjusting axes, labels, scales.

**Visualization process**. In addition, our goal is to model for you the process of constructing a good visualization through iterative revisions.

- · Identifying and fixing display problems
- Discerning informative from non-informative graphical elements
- Designing efficient displays

# 1.1 Background: elements of graphics

To understand why Altair (and other common visualization libraries like ggplot in R) works the way it does, it is helpful to have a framework for characterizing the elements of a graphic. Broadly speaking, graphics consist of sets of **axes**, **geometric objects** plotted on those axes, **aesthetic attributes** of geometric objects, and **text** used to label axes, objects, or aesthetics.

Altair constructs plots by mapping columns of a dataframe to each of these elements. A set of such mappings is referred to as an *encoding*, and the elements of a graphic that a dataframe column can be mapped to are called *encoding channels*.

#### 1.1.0.1 Axes

Axes establish a reference system for a graphic: they define a space within which the graphic will be constructed. Usually these are coordinate systems defined at a particular scale, like Cartesian coordinates on the region (0, 100) x (0, 100), or polar coordinates on the unit circle, or geographic coordinates for the globe.

In Altair, axes are automatically determined based on encodings, but are customizable to an extent.

#### 1.1.0.2 Geometric objects

Geometric objects are any objects superimposed on a set of axes: points, lines, polygons, circles, bars, arcs, curves, and the like. Often, visualizations are characterized according to the type of object used to display data -- for example, the *scatterplot* consists of points, a *bar plot* consists of bars, a *line plot* consists of one or more lines, and so on.

In Altair, geometric objects are called marks.

#### 1.1.0.3 Aesthetic attributes

The word 'aesthetics' is used in a variety of ways in relation to graphics; you will see this in your reading. For us, 'aesthetic attirbutes' will refer to attributes of geometric objects like color. The primary aesthetics in statistical graphics are color, opacity, shape, and size.

In Altair, aesthetic attributes are called *mark properties*.

#### 1.1.0.4 Text

Text is used in graphics to label axes, geometric objects, and legends for aesthetic mappings. Text specification is usually a step in customization for presentation graphics, but often skipped in exploratory graphics. Carefully chosen text is very important in this context, because it provides essential information that a general reader needs to interpret a plot.

In Altair, text is usually controlled as part of encoding specification.

# 1.2 0. Dataset: GDP and life expectancy

We'll be illustrating Altair functionality and visualization process using a dataset comprising observations of life expectancies at birth for men, women, and the general population, along with GDP per capita and total population for 158 countries at approximately five-year intervals from 2000 to 2019.

- Observational units: countries.
- Variables: country, year, life expectancy at birth (men, women, overall), GDP per capita, total population, region (continent), and subregion.

The data come from merging several smaller datasets, mostly collected from World Bank Open Data (https://data.worldbank.org/). The result is essentially a convenience sample, but descriptive analyses without inference are nonetheless interesting and suggestive.

Your focus won't be on acquainting yourself with the data carefully or on tidying. The cell below imports and merges component datasets.

```
In [3]:
         ▶ # import and format country regional information
            countryinfo = pd.read csv(
                'data/country-info.csv'
            ).iloc[:, [2, 5, 6]].rename(
                columns = {'alpha-3': 'Country Code'}
            )
            # import and format gdp per capita
            gdp = pd.read_csv(
                'data/gdp-per-capita.csv', encoding = 'latin1'
            ).drop(columns = ['Indicator Name', 'Indicator Code']).melt(
                id_vars = ['Country Name', 'Country Code'],
                var name = 'Year',
                value_name = 'GDP per capita'
            ).astype({'Year': 'int64'})
            # import and format life expectancies
            life = pd.read csv(
                'data/life-expectancy.csv'
            ).rename(columns={'All': 'Life Expectancy',
                               'Male': 'Male Life Expectancy',
                               'Female': 'Female Life Expectancy'
                             })
            # import population data
            pop = pd.read csv(
                'data/population.csv', encoding = 'latin1'
            ).melt(
                id_vars = ['Country Name', 'Country Code'],
                var_name = 'Year',
                value name = 'Population'
            ).astype({'Year': 'int64'}).drop(columns = 'Country Name')
            # merge
            merge1 = pd.merge(life, gdp, how = 'left', on = ['Country Name', 'Year']
            merge2 = pd.merge(merge1, countryinfo, how = 'left', on = ['Country Code
            merge3 = pd.merge(merge2, pop, how = 'left', on = ['Country Code', 'Year
```

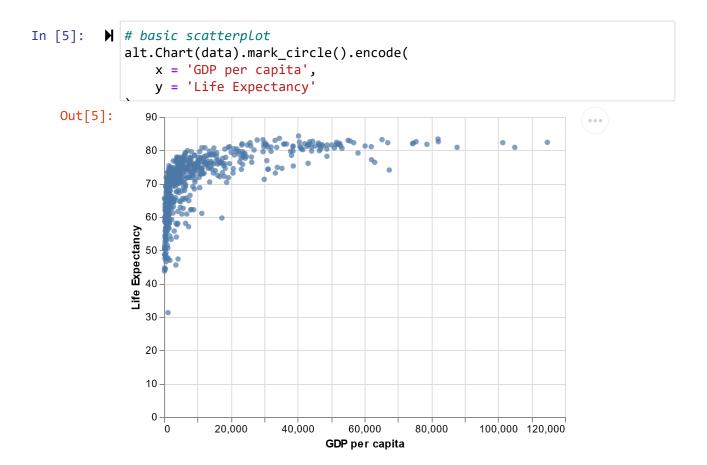
Country Name	Year	Life Expectancy	Male Life Expectancy	Female Life Expectancy	GDP per capita	region
<b>o</b> Afghanistan	2019	63.2	63.3	63.2	507.103432	As
Afghanistan	2015	61.7	61.0	62.3	578.466353	As
Afghanistan	2010	59.9	59.6	60.3	543.303042	As
Albania	2019	78.0	76.3	79.9	5353.244856	Euroţ
5 Albania	2015	77.8	76.1	79.7	3952.801215	Europ

# 1.3 1. A starting point: scatterplot of life expectancy against GDP per capita

Here you'll see how marks and encodings work in a basic sense, along with some examples of how to adjust encodings.

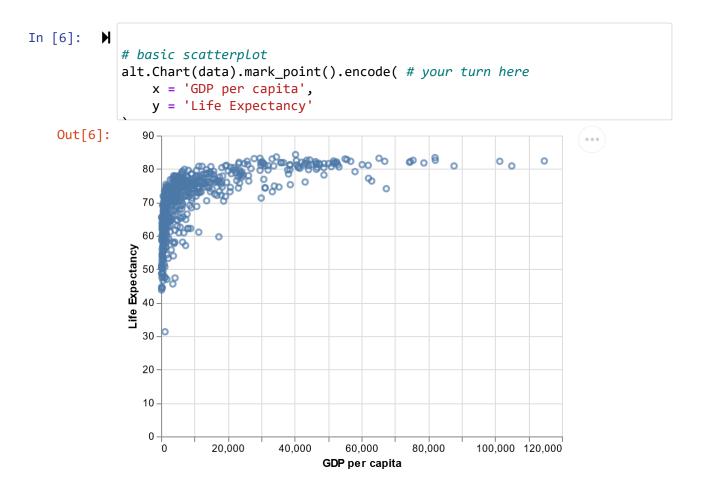
The following cell constructs a scatterplot of life expectancy at birth against GDP per capita; each point corresponds to one country in one year. The syntax works as follows:

- alt.Chart() begins by constructing a 'chart' object constructed from the dataframe;
- the result is passed to .mark\_circle(), which specifies a geometric object (circles) to add to the chart;
- the result is passed to .encode(), which specifies which columns should be used to determine the coordinates of the circles.



## 1.3.1 Question 1ai. Different marks

The cell below is a copy of the previous cell. Have a look at the <u>documentation on marks</u> (<u>https://altair-viz.github.io/user\_guide/marks.html</u>) for a list of the possible mark types. Try out a few alternatives to see what they look like! Once you're satisfied, change the mark to points.



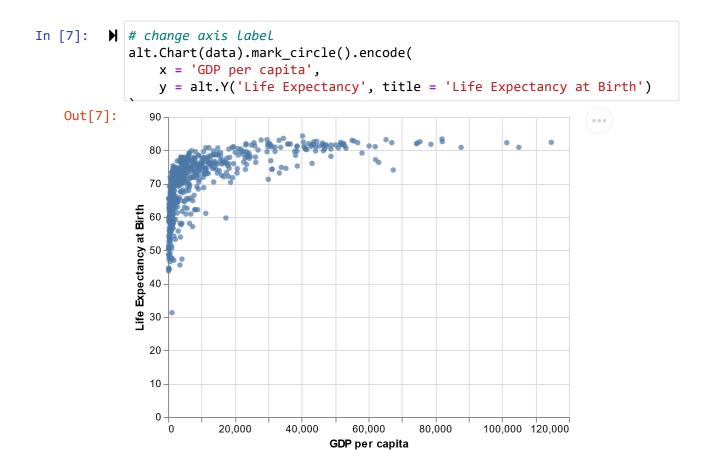
## 1.3.2 Question 1aii.

What is the difference between points and circles, according to the documentation?

You can further alter points, whereas circle is fixed.

## 1.3.3 Axis adjustments with alt.X() and alt.Y()

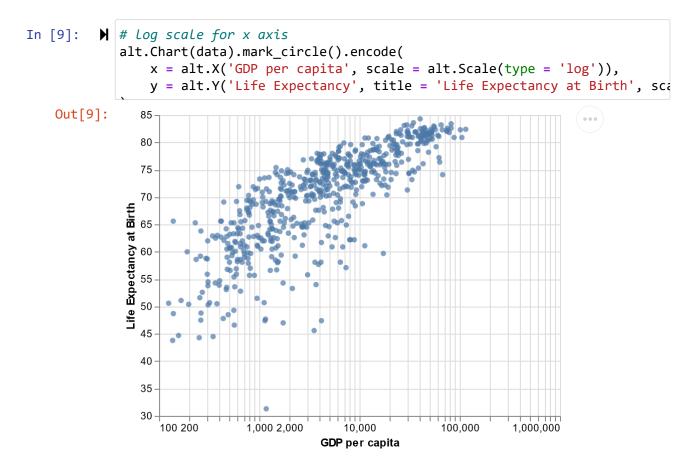
An initial problem that would be good to resolve before continuing is that the y axis label isn't informative. Let's change that by wrapping the column to encode in alt.Y() and specifying the title manually.



alt.Y() and alt.X() are helper functions that modify encoding specifications. The cell below adjusts the scale of the y axis as well; since above there are no life expectancies below 30, starting the y axis at 0 adds whitespace.

```
In [8]:
              # don't start y axis at zero
              alt.Chart(data).mark_circle().encode(
                   x = 'GDP per capita',
                   y = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', sca
    Out[8]:
                  85
                  80
                  75
                  70
               Life Expectancy at Birth
                  45
                  40
                  35
                  30
                                                             80,000
                             20,000
                                       40,000
                                                  60,000
                                                                       100,000 120,000
                                              GDP per capita
```

In the plot above, there are a lot of points squished together near x=0. It will make it easier to see the pattern of scatter in that region to adjust the x axis so that values are not displayed on a linear scale. Using alt.Scale() allows for efficient axis rescaling; the cell below puts GDP per capita on a log scale.



## 1.3.4 Question 1b. Changing axis scale

Try a different scale by modifying the type = ... argument of alt.Scale in the cell below. Look at the <u>altair documentation (https://altair-viz.github.io/user\_guide/generated/core/altair.Scale.html)</u> for a list of the possible types.

```
In [19]:
            H
               # try another axis scale
               alt.Chart(data).mark_circle().encode(
                   x = alt.X('GDP per capita', scale = alt.Scale(type = 'symlog')),
                     = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', sca
    Out[19]:
                  85
                  80
                  75
                  70
                Life Expectancy at Birth
                  45
                  40
                  35
                  30
                                             GDP per capita
```

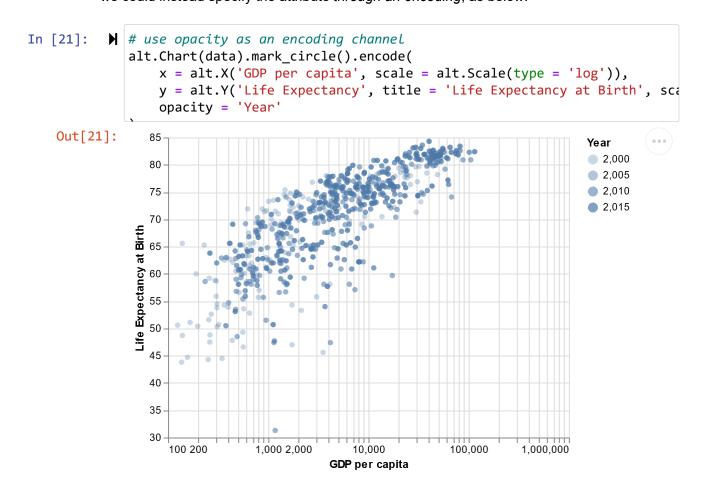
# 1.4 2. Using aesthetic attributes to display other variables

Now that you have a basic plot, you can start experimenting with aesthetic attributes. Here you'll see examples of how to add aesthetics, and how to use them effectively to display information from other variables in the dataset.

Let's start simple. The points are a little too on top of one another. Opacity (or transparency) can be added as an aesthetic to the mark to help visually identify tightly clustered points better. The cell below does this by *specifying a global value for the aesthetic at the mark level*.

```
# change opacity globally to fixed value
In [20]:
               alt.Chart(data).mark_circle(opacity = 0.5).encode(
                    x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
                    y = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', sca
    Out[20]:
                  85
                  80
                  75
                  70
                Expectancy at Birth
                  65
                  60
                  55
                  50
                  45
                  40
                  35
                  30
                                  1,000 2,000
                                                                100,000
                     100 200
                                                 10,000
                                                                           1,000,000
                                              GDP per capita
```

If instead of simply modifying an aesthetic, we want to use it to display variable information, we could instead specify the attribute *through an encoding*, as below:

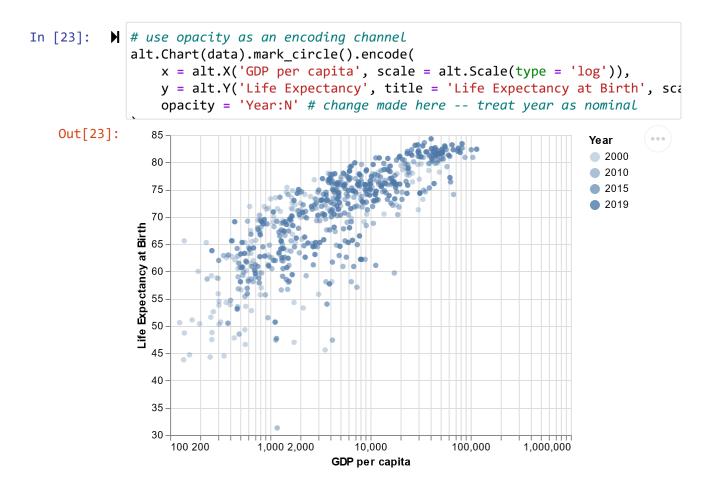


Notice that there's not actually any data for 2005. Isn't it odd, then, that the legend includes

an opacity value for that year? This is because the variable year is automatically treated as quantitative due to its data type (integer). If we want to instead have a unique value of opacity for each year (*i.e.*, use a discrete scale), we can coerce the data type within Altair by putting an :N (for nominal) after the column name.

## 1.4.1 Question 2a. Data Type Coercing

Map the Year column into a nominal data type by putting an :N (for nominal) after the column name.



This displays more recent data in darker shades. Nice, but not especially informative. Let's try encoding year with color instead.

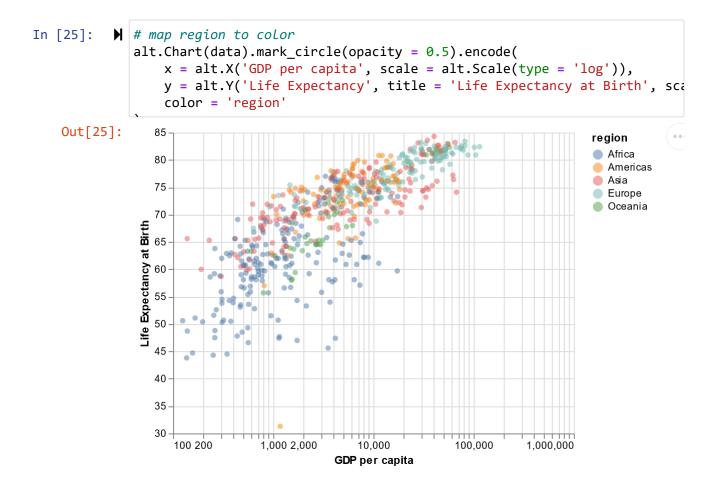
## 1.4.2 Question 2b. Color encoding

Map Year (as nominal) to color.

```
In [24]:
            H
               # map year to color
               alt.Chart(data).mark_circle().encode(
                    x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
                    y = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', sca
                    color = 'Year:N'
    Out[24]:
                  85
                                                                                      Year
                                                                                       2000
                  80
                                                                                        2010
                                                                                        2015
                  75
                                                                                       2019
                  70
                Life Expectancy at Birth
                  45
                  40
                  35
                  30
                     100 200
                                   1,000 2,000
                                                  10,000
                                                                 100,000
                                                                            1,000,000
                                              GDP per capita
```

Pretty, but there's not a clear pattern, so the color aesthetic for year doesn't make the plot any more informative. This **doesn't** mean that year is unimportant; just that color probably isn't the best choice to show year.

Let's try to find a color variable that does add information to the plot. When region is mapped to color, there is a clear(er) pattern consisting of sets of overlapping clusters. This communicates visually that there's some similarity in the relationship between GDP and life-expectancy among countries in the same region.



That's a little more interesting. Let's add another variable: map population to size, so that points are displayed in proportion to the country's total population.

```
In [26]:
               # map population to size
                alt.Chart(data).mark_circle(opacity = 0.5).encode(
                     x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
                     y = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', sca
                     color = 'region',
                     size = 'Population'
    Out[26]:
                   85
                                                                                          region
                                                                                             Africa
                   80
                                                                                             Americas
                                                                                             Asia
                   75
                                                                                             Europe
                                                                                             Oceania
                   70
                 Life Expectancy at Birth
                                                                                           Population
                                                                                              200,000,000
                   65
                                                                                              400,000,000
                   60
                                                                                              600,000,000
                                                                                              800,000,000
                   55
                                                                                              1,000,000,000
                   50
                                                                                              1,200,000,000
                   45
                   40
                   35
                   30
                      100 200
                                     1,000 2,000
                                                    10,000
                                                                    100,000
                                                                                1,000,000
                                                 GDP per capita
```

Great, but highly populous countries in Asia are so much larger than countries in other regions that, when size is displayed on a linear scale, too many data points are hardly visible. Just like the axes were rescaled using alt.X() and alt.Scale(), other encoding channels can be rescaled, too. Below, size is put on a square root scale.

```
In [27]:
               # rescale size
               alt.Chart(data).mark_circle(opacity = 0.5).encode(
                    x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
                    y = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', sca
                    color = 'region',
                    size = alt.Size('Population', scale = alt.Scale(type = 'sqrt')) # c/
    Out[27]:
                   85
                                                                                       region
                                                                                       Africa
                   80
                                                                                          Americas
                                                                                          Asia
                   75
                                                                                         Europe
                                                                                         Oceania
                   70
                Expectancy at Birth
                                                                                       Population
                                                                                           200,000,000
                                                                                           400,000,000
                                                                                           600,000,000
                                                                                           800,000,000
                   50
                                                                                           1,000,000,000
                                                                                           1,200,000,000
                   45
                   40
                   35
                   30
                                   1,000 2,000
                      100 200
                                                  10,000
                                                                  100,000
                                                                             1,000,000
                                               GDP per capita
```

Not only does this add information, but it makes the regional clusters a little more visible!

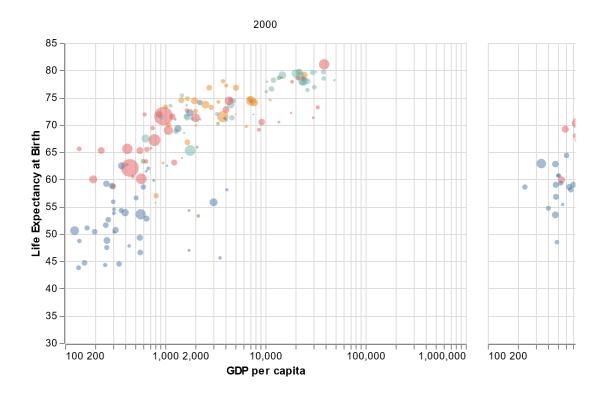
# 1.5 3. Faceting

Your previous graphic looks pretty good, and is nearly presentation-quality. However, it still doesn't display year information. As a result, each country appears multiple times in the same plot.

Faceting is another term for making a panel of plots. This can be used to make separate plots for each year, so that every obeservational unit (country) only appears once on each plot, and possibly an effect of year will be evident.

```
In [28]: # facet by year
alt.Chart(data).mark_circle(opacity = 0.5).encode(
    x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
    y = alt.Y('Life Expectancy', title = 'Life Expectancy at Birth', scale = alt.Scale(type = 'sqrt'))
    size = alt.Size('Population', scale = alt.Scale(type = 'sqrt'))
).facet(
    column = 'Year'
```

## Out[28]:



## 1.5.1 Question 3a. Now each panel is too big.

Resize the individual facets using .properties(width = ..., height = ...). This has to be done *before* faceting. Try a few values before settling on a size that you like.

Looks like life expectancy is increasing over time! Can we also display the life expectancies for each sex separately? To do this, we'll need to rearrange the dataframe a little -- untidy it so that we have one variable that indicates sex, and another that indicates life expectancy.

## 1.5.2 Question 3b. Melt for plotting purposes

Drop the Life Expectancy column and melt the Male Life Expectancy, and Female Life Expectancy columns of data so that:

- the values appear in a column called Life Expectancy at Birth;
- the variable names appear in a column called Group.

Store the result as plot\_df and print the first few rows. It may be helpful to check the pandas documentation on melt (https://pandas.pydata.org/docs/reference/api/pandas.DataFrame.melt.html?highlight=melt#pandas.DataFrame.melt).

### In [37]:



### Out[37]:

	Country Name	Year	Life Expectancy	Male Life Expectancy	Female Life Expectancy	GDP per capita	region
0	Afghanistan	2019	63.2	63.3	63.2	507.103432	As
1	Afghanistan	2015	61.7	61.0	62.3	578.466353	As
2	Afghanistan	2010	59.9	59.6	60.3	543.303042	As
4	Albania	2019	78.0	76.3	79.9	5353.244856	Europ
5	Albania	2015	77.8	76.1	79.7	3952.801215	Europ

#### In [182]:

```
# melt
```

#### Out[182]:

	Country Name	Year	GDP per capita	region	sub- region	Population	Group	Expecta at E
3	Albania	2019	5353.244856	Europe	Southern Europe	2854191.0	Male	
4	Albania	2015	3952.801215	Europe	Southern Europe	2880703.0	Male	
•	Afghanistan	2015	578.466353	Asia	Southern Asia	34413603.0	Male	
2	Afghanistan	2010	543.303042	Asia	Southern Asia	29185507.0	Male	
(	Afghanistan	2019	507.103432	Asia	Southern Asia	38041754.0	Male	

You will need to complete the part above correctly before moving on. The first several rows of plot\_df should match the following:

In [185]: ► Out[185]:

	Country Name	Year	GDP per capita	region	sub- region	Population	Group	Expec at
0	Afghanistan	2019	507.103432	Asia	Southern Asia	38041754.0	Male	
1	Afghanistan	2015	578.466353	Asia	Southern Asia	34413603.0	Male	
2	Afghanistan	2010	543.303042	Asia	Southern Asia	29185507.0	Male	
3	Albania	2019	5353.244856	Europe	Southern Europe	2854191.0	Male	
4	Albania	2015	3952.801215	Europe	Southern Europe	2880703.0	Male	
1235	Zambia	2000	345.689554	Africa	Sub- Saharan Africa	10415944.0	Female	
1236	Zimbabwe	2019	1463.985910	Africa	Sub- Saharan Africa	14645468.0	Female	
1237	Zimbabwe	2015	1445.071062	Africa	Sub- Saharan Africa	13814629.0	Female	
1238	Zimbabwe	2010	948.331854	Africa	Sub- Saharan Africa	12697723.0	Female	
1239	Zimbabwe	2000	563.057741	Africa	Sub- Saharan Africa	11881477.0	Female	

1240 rows × 8 columns

```
In [144]: # check result
pd.read_csv('data/plotdf-check.csv')
```

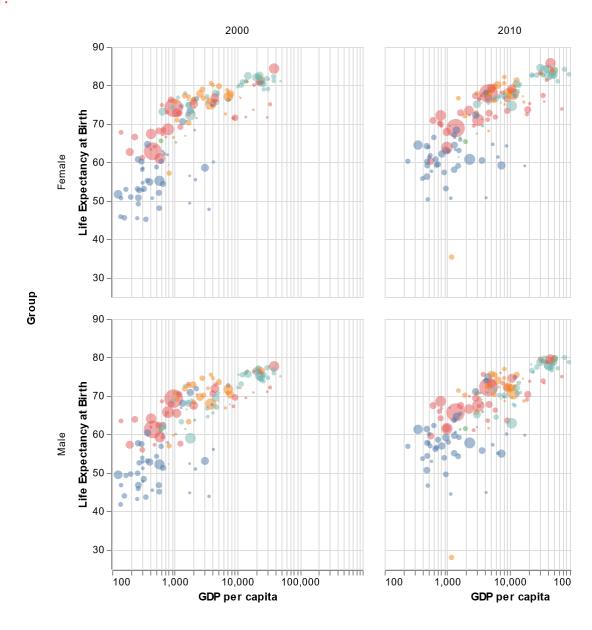
Out[144]:

	Country Name	Year	GDP per capita	region	sub- region	Population	Group	expecta at b
0	Afghanistan	2019	507.103432	Asia	Southern Asia	38041754.0	Male	
1	Afghanistan	2015	578.466353	Asia	Southern Asia	34413603.0	Male	
2	Afghanistan	2010	543.303042	Asia	Southern Asia	29185507.0	Male	
3	Albania	2019	5353.244856	Europe	Southern Europe	2854191.0	Male	
4	Albania	2015	3952.801215	Europe	Southern Europe	2880703.0	Male	

Now you can use the Group variable you defined to facet by both year and sex. This is shown below:

```
In [186]: # facet by both year and sex
alt.Chart(plot_df[plot_df['Group'] != 'Life Expectancy']).mark_circle(or
    x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
    y = alt.Y('Life Expectancy at Birth:Q', scale = alt.Scale(zero = Falcolor = 'region',
        size = alt.Size('Population', scale = alt.Scale(type = 'sqrt'))
).properties(
    width = 250,
    height = 250
).facet(
    column = 'Year',
    row = 'Group'
```

### Out[186]:

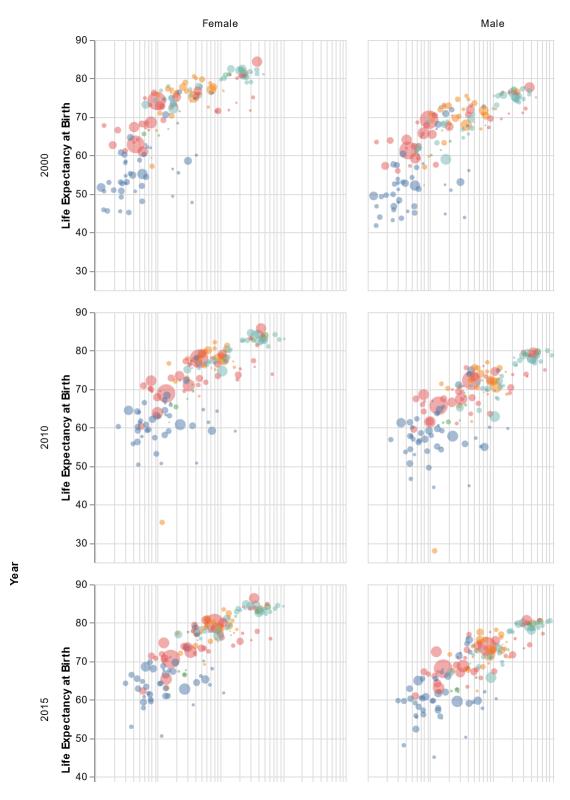


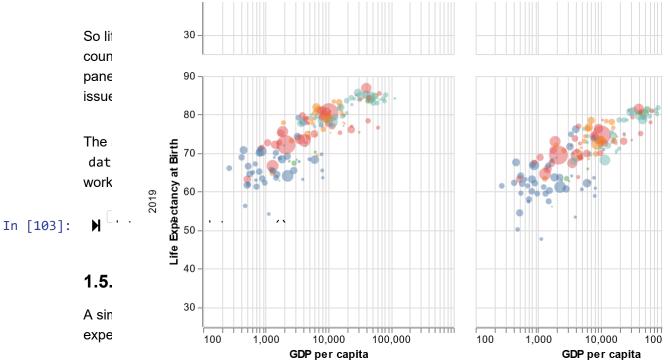
## 1.5.3 Question 3c. Adjusting facet layout

It's a little hard to line up the patterns visually between sexes because they are aligned on GDP per capita, not life expectancy -- so we can't really tell without moving our eyes back and forth and checking the axis ticks whether there's much difference in life expectancy rates by sex. Switching the row/column layout gives a better result. Modify the cell below so that facet columns correspond to sex and facet rows correspond to years.

```
In [187]: # facet by both year and sex
alt.Chart(plot_df[plot_df['Group'] != 'Life Expectancy']).mark_circle(or
    x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
    y = alt.Y('Life Expectancy at Birth:Q', scale = alt.Scale(zero = Falcolor = 'region',
    size = alt.Size('Population', scale = alt.Scale(type = 'sqrt'))
).properties(
    width = 250,
    height = 250
).facet(
    column = 'Group', # your turn here
    row = 'Year' # your turn here
```

Out[187]: Group



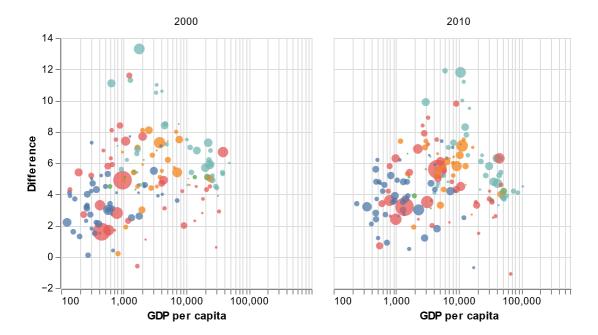


- append a new variable Difference to data\_mod1 that gives the difference between female and male (F - M) life expectancies in each country and year;
- modify the your plot in Q3 (b) (general life expectancy against GDP per capita by year) to instead plot the difference in life expectancies at birth against GDP per capita by year.

When modifying the example, be sure to change the axis label appropriately.

```
In [206]:
           # define new variable for difference
              data_mod1['Difference'] = data_mod1["Female Life Expectancy"] - data_mod
              #melting
              stuff = data_mod1.rename(columns = {'Female Life Expectancy':'Female',
              plot_df1 = stuff.melt(id_vars=['Country Name','Year','GDP per capita','r
                                   value_vars=['Male', 'Female'], var_name= 'Group', \
              # plot the difference in life expectancies at birth against GDP per capi
              alt.Chart(plot_df1[plot_df1['Group'] != 'Life Expectancy']).mark_circle(
                  x = alt.X('GDP per capita', scale = alt.Scale(type = 'log')),
                  y = alt.Y('Difference:Q', scale = alt.Scale(zero = False)),
                  color = 'region',
                  size = alt.Size('Population', scale = alt.Scale(type = 'sqrt'))
              ).properties(
                  width = 250,
                  height = 250
              ).facet(
                  column = 'Year'
```

#### Out[206]:

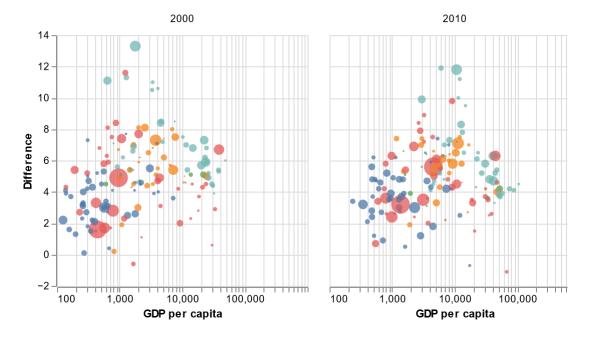


## 1.5.5 Question 3e. Interpretation

Select a graphic for presentation and reproduce it below. State in one sentence why you chose this graphic, and summarize in 1-2 sentences what is shown in the graphic.

```
width = 250,
height = 250
).facet(
  column = 'Year'
```

#### Out[208]:



```
<!-- END QUESTION -->
#### Answer
```

This graphic is important because it is possible that it is misleading. When you use a linear scale, you see that as GDP per capita increases, the difference between the two converges to four years. This will be shown in

## 1.6 4. Your turn

Now that you've seen basic functionality of Altair, explore the data further! Construct any plot of your choosing. It does not need to be fancy or elaborate -- this is just an opportunity to work from scratch and play a little while you're primed on plot construction. However, it should be well-sized, appropriately labeled, and visually clean. Some possibilities you could consider are:

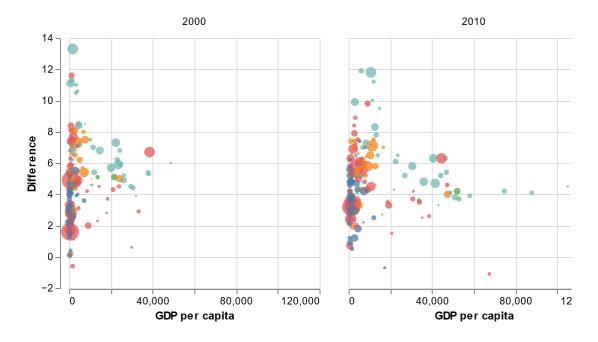
- line plots of life expectancy over time based on the dataset life;
- scatterplots of life expectancy against population;
- aggregating over year or subregion before plotting.

Please produce a graphic and a brief (1-2 sentence) description of what it shows.

```
In [ ]: N .....
```

```
width = 250,
height = 250
).facet(
  column = 'Year'
```

### Out[212]:



## #### Description and Interpretation of Graphic

I choose this graph as it demonstrates that graphics can be misleading. As explained above, if the difference of life expectancies was charted against gdp per capita on a logarithmic scale, it would be easy to miss the fact that as GDP per capita decreases the difference in gendered life

## 1.7 Submission Checklist

- 1. Save file to confirm all changes are on disk
- 2. Run Kernel > Restart & Run All to execute all code from top to bottom
- 3. Save file again to write any new output to disk
- 4. Select File > Download as > HTML.
- 5. Open in Google Chrome and print to PDF.
- 6. Submit to Gradescope

To double-check your work, the cell below will rerun all of the autograder tests.

In []: M