03 - Intro to graphics (with ggplot2)

Data and Information Engineering

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Contents

1	Intro	o to R Graphics 2
	1.1	Graphics Packages
	1.2	Base Graphics
	1.3	plot()
	1.4	ggplot2 package
2	Scat	terplots 3
	2.1	heightweight data 3
	2.2	Data Frames (and Tibbles) 3
	2.3	Basic Scatterplot
	2.4	Aesthetics
	2.5	Your Turn: Scatterplots
	2.6	Additional Geoms
	2.7	Layers
	2.8	Your Turn: Geoms and Layers
	2.9	Plot Objects
	2.10	Scatterplot Aesthetics
3	Bar	Graphs: geom_bar() 17
	3.1	diamonds data
	3.2	Bar graphs
	3.3	geom_bar() 18
	3.4	Two Variables
	3.5	Stats: stat_count() and stat_identity() 22
	3.6	Reordering x-axis reorder() 25
	3.7	Your Turn: Bar Graphs
4	Addi	itional Material 26
	4.1	ggplot 2 details
	4.2	Themes
	4.3	Scales

Required Packages and Data

library(tidyverse)
library(gcookbook)

1 Intro to R Graphics

1.1 Graphics Packages

R has several approaches to making graphics:

- 1. Base Graphics the golden oldies. Includes functions like plot(), lines(), points(), barplot(), boxplot(), hist() etc.
 - Graphics are layered manually. First create high level plots (e.g, with plot), then add on top with e.g., lines() or text()
- 2. ggplot2 Grammar of Graphics created by Hadley Wickham.
- 3. lattice also a popular approach, but we will not cover in this course.

1.2 Base Graphics

Calling a *high-level* plotting function creates a new plot.

• barplot(), boxplot(), curve(), hist(), plot(), dotchart(), image(), matplot(),mosaicplot(),stripchart(),contour()

Low-level functions write on top of the existing plot.

- Add to the plotting region: abline(), lines(), segments(), points(), polygon(), grid()
- Add text: legend(), text(), mtext()
- Modify/add axes: axis(), box(), rug(), title()

1.3 plot()

The plot (x) function can produce plots depending on the class of object x

- if x is data.frame, then a pairs () plot
- if x is a factor vector, then a barplot ()
- if x is a linear model (lm()), then a series of regression diagnostic plots
- Or, we have been creating scatterplots with plot (x, y)

Advanced: type methods (plot) to see all the types of objects that plot () knows about. Some packages add their own plotting methods that can be called with plot (). To see help documentation, type in the full method (e.g., ?plot.data.frame). To see the code that is used (for the methods with asterisks) use the getAnywhere() function, e.g. getAnywhere(plot.data.frame).

1.4 ggplot2 package

The ggplot2 package is created by Hadley Wickham and is the 2nd version of a *grammar of graphics* approach to visualizing data. It takes a somewhat different approach than the base R graphics, which we will illustrate with some examples. There are now several nice resources available:

- 1. Data Visualization Cheat Sheet
- 2. ggplot2 website
- 3. R Graphics Cookbook, by Winston Chang
 - Associated website

4. ggplot2 Theory

2 Scatterplots

2.1 heightweight data

Check out the heightweight data from the gcookbook package (?heightweight). It is a sample of 236 schoolchildren.

```
library(gcookbook) # to access the heightweight data
data(heightweight)
str(heightweight)
#> 'data.frame': 236 obs. of 5 variables:
#> $ sex : Factor w/ 2 levels "f", "m": 1 1 1 1 1 1 1 1 1 1 1 ...
#> $ ageYear : num 11.9 12.9 12.8 13.4 15.9 ...
#> $ ageMonth: int 143 155 153 161 191 171 185 142 160 140 ...
#> $ heightIn: num 56.3 62.3 63.3 59 62.5 62.5 59 56.5 62 53.8 ...
#> $ weightLb: num 85 105 108 92 112 ...
```

2.2 Data Frames (and Tibbles)

A data.frame (and tibble) is similar to a spreadsheet or data table: data represented in rows and columns.

- Technically, we can think of a data frame as a collection of vectors that all have the same length.
 n rows/observations, *p* columns/variables/features
- But they don't have to be of the same *type*. E.g., some columns are character vectors, some numeric vectors, some factors, etc.

Think of each row of the data frame as an observation and each column as a variable.

2.2.1 Getting info about a data frame

• Some useful functions

```
ncol(heightweight) # ncol() gives number of columns
#> [1] 5
nrow(heightweight) # nrow() gives number of rows
#> [1] 236
dim(heightweight) # dim() gives dimensions (nrows, ncols)
#> [1] 236 5
```

• The full data frame can be viewed with the function View() (capital V)

View (heightweight)

• The function str() will give information about a data frame (or any other R object)

```
str(heightweight)
#> 'data.frame': 236 obs. of 5 variables:
#> $ sex : Factor w/ 2 levels "f", "m": 1 1 1 1 1 1 1 1 1 1 ...
#> $ ageYear : num 11.9 12.9 12.8 13.4 15.9 ...
```

#> \$ ageMonth: int 143 155 153 161 191 171 185 142 160 140 ... #> \$ heightIn: num 56.3 62.3 63.3 59 62.5 62.5 59 56.5 62 53.8 ... #> \$ weightLb: num 85 105 108 92 112 ...

2.2.2 Data Types

Each column (feature) of a data frame is a vector of the same *type* of data. R recognizes many data types, but here are the primary ones we will need to know for data visualization:

- numeric or (num) is used for continuous variables
- integer or (int) is used for *integer* variables
 - if an integer column has a few unique values, treat like categorical. Else treat like continuous variable.
- character or (chr) is used for *categorical* variables
 - ordered alphabetically
- factor or (Factor) is used for categorical variables
 - these are special in that factors also contains the *levels*, or possible values the variable can have.
 - ordered by levels
- logical or (logi) for TRUE/FALSE variables
- date or (Date) for *date* variables

The data types determine how each variable can be used in a plot. For example, numeric variables cannot be used for faceting and categorical variables should not be used for the size asthetic. ggplot2 makes the distinction between *discrete* and *continuous* variables on the Data Visualization Cheat Sheet.

2.3 Basic Scatterplot

A scatterplot show the relationship between two numeric (continuous) variables. Here is the basic setup with ggplot2 for examining the relationship between height (heightIn) and age (ageYear)

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear))
```



Is is clear that tall children are generally older than shorter children (trend).



Notice the two components used to build the plot:

- 1. ggplot () initiates a new plot object.
 - ?ggplot
 - It can take arguments data= and mapping=.
 - In the example, we used ggplot(data=heightweight) making the heightweight data available to the other plot layers
- 2. geom_point () adds a layer of points to the plot
 - ?geom_point
 - It can take several arguments, but the primary one is mapping. The mapping tells ggplot where to put the points.
 - The x= and y= arguments of aes() explain which variables to map to the x and y axes of the graph. ggplot will look for those variables in your data set, heightweight.
 - The call geom_point (mapping = aes(x = heightIn, y = ageYear)) specifies that heightIn is mapped to x-axis and ageYear is mapped to y-axis.

You complete your graph by adding one or more layers to ggplot(). Here, the function geom_point() adds a layer of points to the plot, which creates a scatterplot. ggplot2 comes with other geom functions that you can use as well. Each function creates a different type of layer, and each function takes a mapping argument.

The ggplot components can be on different lines, but must have the + separator before the end of line.

```
#- What is wrong here?
ggplot(data=heightweight)
+ geom_point(mapping = aes(x = heightIn, y = ageYear))
```

2.4 Aesthetics

The real strength of ggplot2 is in its mapping of data to a visual component. An *aesthetic* (specified by aes()) is a visual property of the points in your plot. Aesthetics include things like the size, the shape, or the color of your points.

It would make sense to examine our data according to sex to see if there are differences between the boys and girls. We will use the color= aesthetic to color the points according the value of the sex variable

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear, color=sex))
```

This maps the males (m) point to a blueish color and females (f) to reddish color. (We will illustrate how to change these color mappings later). It also creates a legend that shows the mapping.

We could alternatively try mapping the sex value to a shape (with shape= in aes()):

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear, shape=sex))
```



This, by default, maps the males (m) point a triangle and females (f) to a circle.

We could even map both the color and shape to sex:

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear, color=sex, shape=sex))
```



and the legend shows the color and shape.

2.4.1 Fixed aesthetics

The previous examples mapped a third variable, sex, to the color and shape. But we can also fix these values (not associated with a variable) by setting them **outside** of aes().



Notice the legend disappears since these are fixed values.

Summary:

- inside of the aes() function, ggplot2 will map the aesthetic to data values and build a legend.
- *outside* of the aes() function, ggplot2 will directly set the aesthetic to your input.

2.4.2 Continuous aesthetics

Notice that we mapped *continuous* variables to the x and y axis, and a *discrete* (categorical) variable to the color and shape. We can also map *continuous* variables to the aesthetics. For example, we can make a *bubbleplot* by mapping the size of point to the child's weight (weightLb).

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear, size=weightLb))
```



The legend shows how the size corresponds to the weight.

Color can also be set by a continuous variable

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear, color=weightLb))
```



Similar to color, *alpha* controls the transparency of the color



2.4.3 Other aesthetics for geom_point

Each geom can understand a set of aesthetics. We can find out what geom_point() accepts by checking the help

- ?geom_point
- https://ggplot2.tidyverse.org/reference/geom_point.html
- Data Viz cheatsheet

2.5 Your Turn: Scatterplots

Your Turn #2 : Scatterplots

Now that you know how to use aesthetics, take a moment to experiment with the mpg data set (from ggplot2 package).

- 1. Map a discrete variable to color, size, alpha, and shape. Then map a continuous variable to each. Does ggplot2 behave differently for discrete vs. continuous variables?
 - The discrete variables in mpg are: manufacturer, model, trans, drv, fl, class
 - The continuous variables in mpg are: displ, year, cyl, cty, hwy
- 2. Map the same variable to multiple aesthetics in the same plot. Does it work? How many legends does ggplot2 create?
- 3. Attempt to set an aesthetic to something calculated, like displ < 5. What happens?

2.6 Additional Geoms

A *geom* is the geometrical object that a plot uses to represent data. People often describe plots by the type of geom that the plot uses. For example, bar charts use bar geoms, line charts use line geoms, boxplots use boxplot geoms, and so on. Scatterplots use the point geom.

You can use different geoms to plot the **same data**. The plot on the left uses the point geom, and the plot on the right uses the smooth geom, a smooth line fitted to the data.





Both plots represent the same data, but in different ways. The smooth curve is an estimate of the mean age for a given value of height (with point-wise 95% confidence interval), while the points are the raw values.

The geom_smooth() can take a different set of aesthetics than geom_point().

2.7 Layers

We can also layer geoms to add additional information

```
ggplot(data=heightweight) +
geom_smooth(mapping = aes(x = heightIn, y = ageYear)) +
geom_point(mapping = aes(x = heightIn, y = ageYear))
```



Note that the order of adding layers matters. If we added the points first (and set a large alpha value), then some of the points would be obscured.

```
ggplot(data=heightweight) +
geom_point(mapping = aes(x = heightIn, y = ageYear)) +
geom_smooth(mapping = aes(x = heightIn, y = ageYear), alpha=.8)
```

2.7.1 Global vs. local aesthetics

Notice that in the last example, we specified the x and y mappings twice. This is not necessary. *Global* aesthetics can be assigned in the ggplot() function and will apply to all layers (unless specified in the geoms). For example, the previous example could be produced by:

heightIn



Because the data and x,y mappings are given in ggplot(), they apply to both subsequent layers. These global settings can be modified or enhanced at the geom level



Also, each geom can use its own data



2.7.2 Arguments by position

Remember that ggplot () and geom_* () are functions, so we can set their arguments by name or position. Because data= is the first argument of ggplot () and mapping= is the second, we do not need specify the names, but can use position. Likewise, mapping= is the first argument of the geoms. So we can save typing by using position



Notice, we still need to name data=filter(heightweight, heightIn > 60) in the call the geom_smooth() because the first argument is expected to be mapping, not data.

2.8 Your Turn: Geoms and Layers

2.9 Plot Objects

Every ggplot function returns a plot object that can be saved in the environment and reused as necessary. For example

g = ggplot(heightweight, aes(x = heightIn, y = ageYear))

Now go to the environment tab and see the structure of g. It is a list with all the specifications for plotting, along with the data. But so far no layers.

We can add a layer, but not plot it yet

g2 = g + geom_point (aes(color=sex))

To make the plot, we have to explicitly print it.

```
g2 + geom_smooth() #-or explicitly- print(g2 + geom_smooth())
```



This makes is easy to save plots, or components, for reuse and reduce possibility of introducing errors.

```
Notice that partial plot objects are used frequently in the Data Visualization Cheatsheet.
```

2.9.1 Saving Plot Outputs

Plot outputs can be saved with the ${\tt ggsave}$ () function. For example

```
ggsave("figs/myplot.pdf", plot=g2)
```

will make a *pdf* plot of the scatterplot g2.

Your Turn #4 : Plot Objects

Consider the code:

```
g2 + geom_smooth()
```

```
ggsave("figs/myplot.pdf")
```

- 1. Where would this plot be saved on your machine?
- 2. Describe the plot that will be saved?

2.10 Scatterplot Aesthetics

Scatterplots can take several aesthetics: x, y, alpha, color, fill, shape, size, and stroke. These options can be found

- -?geom_point
- Data Viz Cheatsheet

Some detail of the aesthetics can be found in ggplot2 documentation: https://ggplot2.tidyverse.org/ reference/index.html#section-aesthetics.

Mapping variable values to colors from cookbook-r

- The alpha= aesthetic controls the transparency
- alpha takes values in [0, 1].
 - 1 (default value) for no transparency
 - 0 is fully transparent

Your Turn #5 : Aesthetic Mapping

1. What is the difference between setting an aesthetic and mapping an aesthetic to a variable?

2. Explain how variables are mapped to aesthetics.

3 Bar Graphs: geom_bar()

3.1 diamonds data

The ggplot2 package provides the diamonds data, which contains the prices and other attributes of over 50K round cut diamonds. (Type ?diamonds for details.)

```
data(diamonds) # load the diamonds data from ggplot2 package
diamonds
             # print the diamonds data frame
#> # A tibble: 53,940 x 10
#>
     carat cut
               color clarity depth table price
                                                 Х
                                                      V
                                                            Z
#>
                 <dbl> <ord>
#> 1 0.23 Ideal E SI2
                              61.5 55 326 3.95
                                                    3.98
                                                         2.43
#> 2 0.21 Premium E
                                     61
                                          326 3.89
                       SI1
                               59.8
                                                    3.84
                                                         2.31
  3 0.23 Good
                  E
                       VS1
                               56.9
                                      65
                                          327
                                               4.05
                                                    4.07
#>
                                                         2.31
#> 4 0.290 Premium I
                               62.4 58
                                          334 4.2
                                                    4.23
                       VS2
                                                         2.63
#> 5 0.31 Good
                 J
                       SI2
                               63.3 58
                                          335
                                              4.34
                                                    4.35
                                                         2.75
                               62.85762.357
#> 6 0.24 Very Good J
                       VVS2
                                          336 3.94
                                                    3.96
                                                         2.48
#> 7 0.24 Very Good I
                       VVS1
                                          336 3.95
                                                    3.98
                                                         2.47
                               61.9 55
#> 8 0.26 Very Good H
                                          337 4.07
                                                    4.11
                       SI1
                                                         2.53
                E
#> 9 0.22 Fair
                       VS2
                               65.1
                                     61
                                          337 3.87
                                                    3.78 2.49
#> 10 0.23 Very Good H
                       VS1
                               59.4
                                      61
                                          338 4
                                                    4.05
                                                         2.39
#> # ... with 53,930 more rows
```

3.2 Bar graphs

Bar graphs are used to display numeric values (on the y-axis) for different *discrete values* (on the x-axis). A (usually filled) bar extends from 0 to the numeric value. This is a common type of plot to visualize frequency tables (counts of cases in the data).

3.3 geom_bar()

The basic analysis of categorical/discrete data is a count of how many times each value occurs. This is achieved with the basic frequency table and corresponding bar graph. By default, geom_bar() will count the occurrences *and* produce a bar graph.



Notice that only the x axis must be specified as ggplot2 will calculate the counts automatically.

3.4 Two Variables

What is more interesting is to examine the joint occurrence of two discrete variables (e.g., clarity and cut). We will examine four ways to do this: stacked bar graph, side-by-side bar graph, filled bar graph, and faceting.

3.4.1 Stacked bar graph

Here we will use clarity as the x-axis and map fill= to the cut variable to make a *stacked* bar graph g2 + geom_bar(aes(x=clarity, fill=cut))



VVS1

IF

VVS2

Why did we specify fill= instead of color=?

11

SI2

SI1

3.4.2 Side-by-Side bar graph

0

count

Another option is a *side-by-side* bar graph. This is achieved by setting position="dodge" g2 + geom_bar(aes(x=clarity, fill=cut), position="dodge")

VS2

clarity

VS1

5000 -4000 cut Fair 3000 count Good Very Good Premium 2000 -Ideal 1000 -0. VS1 VVS2 VVS1 IF 11 Si2 SI1 VS2 clarity

Notice in the help (?geom_bar), the default position="stack". This is why we didn't need to specify position in the *stacked* bar graph example.

3.4.3 Filled bar graph

The *filled* bar graph is a bit different. It converts the counts into a *relative frequency*. The y-axis is no longer a count, but a proportion.



The filled bar graph gives a different perspective on the relationship between clarity and cut. By removing the masking effects of total counts, it becomes apparent that cut improves with clarity; something not immediately obvious in the previous plots.

3.4.4 Facets

Another way to show the barplot for two (or three) variables is with faceting.

```
g2 + geom_bar(aes(x=clarity)) + facet_wrap(~cut)
```



The facet_wrap() function will display the plot over a wrapped grid. While facet_grid() will display in a grid and is most suitable for two variable faceting

```
g2 + geom_bar(aes(x=clarity)) + facet_grid(color~cut)
```



```
Note that faceting will work with other geoms. This faceted scatterplot shows five variables.
ggplot(diamonds) + geom_point(aes(x=carat, y=price, color=clarity)) +
facet_grid(color~cut)
```



3.5 Stats: stat_count() and stat_identity()

Notice in the basic bar graph:

```
g2 + geom_bar(aes(x=clarity))
```



we only set the x-axis aesthetic and ggplot knew to calculate the frequency and assign the y value the counts (with label). It did this by creating new data with a with a stat, or statistical transformation, and then applying the geom. Specifically, geom_bar(), by default, uses stat_count which computes a data set of counts for each x value from your raw data. geom_bar() then uses this computed data to make the plot.

We could mimic this by first creating the counts data, but then we would need to use stat=identity so no further transformations are used.

d.table = count (diamonds, clarity) # count () returns the frequence												
d.table												
#>	# A tibble: 8 x 2											
#>		clarity	п									
#>		<ord></ord>	<int></int>									
#>	1	I1	741									
#>	2	SI2	9194									
#>	3	SI1	13065									
#>	4	VS2	12258									
#>	5	VS1	8171									
#>	6	VVS2	5066									
#>	7	VVS1	3655									
#>	8	IF	1790									
<pre>ggplot(data=d.table) + geom_bar(aes(x=clarity, y=n), stat='identity')</pre>												



More details on the stats are given in: http://r4ds.had.co.nz/data-visualisation.html#statistical-transformations.

```
The new geom_col() function is shortcut for geom_bar(..., stat='identity')
ggplot(d.table) + geom_col(aes(x=clarity, y=n))
```



3.5.1 Relative frequencies

I often work with relative frequencies rather than the raw counts. It is not difficult to pre-calculate our relative frequencies

```
d2 = mutate(d.table, rel.freq=n/sum(n))
d2
#> # A tibble: 8 x 3
#> clarity n rel.freq
#>
    <ord> <int>
                    <dbl>
             741 0.0137
#> 1 I1
#> 2 SI2
             9194 0.170
#> 3 SI1
            13065
                    0.242
#> 4 VS2
            12258
                    0.227
                    0.151
#> 5 VS1
            8171
#> 6 VVS2
             5066
                    0.0939
                    0.0678
#> 7 VVS1
             3655
#> 8 IF
             1790
                    0.0332
ggplot(data=d2) +
        geom_col(aes(x=clarity, y=rel.freq)) +
        geom_text(aes(x=clarity, y=rel.freq, label=n), vjust=1.5, color="white", size=4)
```



Notice how the geom_text() is used with the label= aesthetic.

The mutate() functions adds a calculated column to a data frame. We will learn about this function later.

3.6 Reordering x-axis reorder ()

How is the x-axis ordered? If the variable mapped to the x-axis is:

- numeric (or integer), then it orders from smallest to largest
- factor, then it orders according to the levels
- character, then it orders alphabetically (basically converts to factor)

But we are creating graphics to reveal something about the data. And the ordering of the bars can bring understanding. There are two primary orderings: inherent ordering of the levels or height of the bars.

In the diamonds data, the factors (cut, color, and clarity) are already ordered from worst to best quality. But we may want to reorder from the most frequent level. This can be achieved with the reorder () function.

```
#- increasing order
ggplot(data=d.table) + geom_col(aes(x=reorder(clarity, n), y=n))
#- decreasing order
ggplot(data=d.table) + geom_col(aes(x=reorder(clarity, -n), y=n))
```



3.7 Your Turn: Bar Graphs

Your Turn #6 : Bar Graphs

Using the mpg data from ggplot2 package:

- 1. Make a bar graph of cyl and facet by drv
- 2. Make a filled bar graph of cyl with a fill= according to year

4 Additional Material

4.1 ggplot 2 details

- **data** is what we want to visualize. Consists of variables, which are the columns of a data frame (data must be a data frame)
- geoms are geometric objects that are drawn to represent data (bars, lines, points, etc.)
- aesthetics are the visual properties of geoms, such as x and y position, line color, point shapes, etc.
- **mappings** from data values to aesthetics (map a factor value to a color)
- scales control the mapping from the values in data space to values in aesthetic space. E.g., a continuous y scale maps larger numeric values to vertically higher positions in space.
- **guides** show the viewer how to map visual properties back to data space (e.g., tick marks, axis labels, etc.)

4.2 Themes

Themes control the *non-data* elements of the plot. They allow a plot to match an existing style guide or meet your aesthetic tastes. Themes are used to set things like fonts, ticks, panel strips, and backgrounds.

Here is a start on a University of Virginia theme, using the official UVA colors.

```
theme_UVA = theme(
    panel.background = element_rect(fill='#232D4B'),
    panel.grid.major = element_line(color="#E57200"),
    panel.grid.minor = element_line(color="#E57200", size=0.2),
    panel.border = element_rect(color="#E57200", fill=NA, size=2))
ggplot(economics, aes(date, unemploy)) +
```



4.3 Scales

The *scale* controls the mapping from the values in data space to values in aesthetic space. For example, scale_size_area() sets the size of a point proportional to the area, not radius. scale_fill_brewer() and scale_color_brewer() change the fill and color mappings according to colorbrewer palettes. You can also change the coordinate scale (scale_x_log10), etc. Type scale_ and hit Tab from RStudio to scroll through all options. Check out https://ggplot2.tidyverse.org/reference/index.html#section-scales and https://ggplot2-book.org/scales.html for specific examples and options.