TraMineR: A toolbox for exploring and rendering sequences

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Outline

- TraMineR, What is it?
- 2 Overview of what TraMineR can do
- More about TraMineR



TraMineR

• Trajectory Miner in R: a toolbox for exploring, rendering and analyzing categorical sequence data



TraMineR, Why?

- TraMineR primary aim: Answer questions from social sciences
 - where sequences (succession of states or events) describe life trajectories
- Examples of questions:
 - Do life courses obey some social norm?
 - Which are the standard trajectories?
 - What kind of departures do we observe from those standards?
 - How do life course patterns evolve over time?
 - Why are some people more at risk to follow a chaotic trajectory or stay stuck in a state?
 - How does the trajectory complexity evolve across birth cohorts?
 - How is the life trajectory related to sex, social origin and other cultural factors?



What TraMineR offers to answer those questions

- Various graphics and descriptive measures of individual sequences.
- Tools for computing pairwise dissimilarities between sequences which open access to plenty of advanced statistical and data analysis tools
 - Clustering and principal coordinate analysis (MDS)
 - Discrepancy analysis (ANOVA and regression trees)
 - Identification of representative sequences (trajectory-types)
 - ...
- Tools for mining frequent and discriminant event subsequences

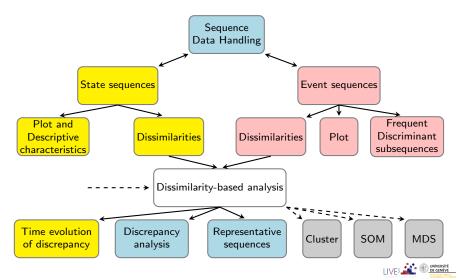


TraMineR's features

- Handling of longitudinal data and conversion between various sequence formats
- Plotting sequences (distribution plot, frequency plot, index plot and more)
- Individual longitudinal characteristics of sequences (length, time in each state, longitudinal entropy, turbulence, complexity and more)
- Sequence of transversal characteristics by position (transversal state distribution, transversal entropy, modal state)
- Other aggregated characteristics (transition rates, average duration in each state, sequence frequency)
- Dissimilarities between pairs of sequences (Optimal matching, Longest common subsequence, Hamming, Dynamic Hamming, Multichannel and more)
- Representative sequences and discrepancy measure of a set of sequences
- ANOVA-like analysis and regression tree of sequences
- Rendering and highlighting frequent event sequences
- Extracting frequent event subsequences
- Identifying most discriminating event subsequences
- Association rules between subsequences



The TraMineR Swiss knife



Other programs for sequence analysis

- Optimize (Abbott, 1997)
 - Computes optimal matching distances
 - No longer supported
- TDA (Rohwer and Pötter, 2002)
 - free statistical software, computes optimal matching distances
- Stata, SQ-Ados (Brzinsky-Fay et al., 2006)
 - free, but licence required for Stata
 - optimal matching distances, visualization and a few more
 - See also the add-ons by Brendan Halpin http://teaching.sociology.ul.ie/seqanal/
- CHESA free program by Elzinga (2007)
 - Various metrics, including original ones based on non-aligning methods
 - Turbulence
- No equivalent package in R.
 - Packages such as those provided by Bioconductor are specifically devoted to biological issues.
 - arulesSequences mining of association rules (Zaki, 2001)



Sequence data

Sequence data

- Multiple cases (n cases)
- For each case a sorted list of (categorical) values

• Example:

3: b c c



Longitudinal data

TraMineR is primarily intended for longitudinal data

Longitudinal data

- Repeated observations on units observed over time (Beck and Katz, 1995).
- "A dataset is longitudinal if it tracks the same type of information on the same subjects at multiple points in time". (http://www.caldercenter.org/whatis.cfm)
- "The defining feature of longitudinal data is that the multiple observations within subject can be ordered" (Singer and Willett, 2003)



Longitudinal data: Where do they come from?

- Individual follow-ups: Each important event is recorded as soon as it occurs (medical card, cellular phone, weblogs, ...).
- Panels: Periodic observation of same units
- Retrospective data (biography): Depends on interviewees' memory
- Matching data from different sources (successive censuses, tax data, social security, population registers, acts of marriages, acts of deaths, ...)
 - Examples: Wanner and Delaporte (2001), censuses and population registers, Perroux and Oris (2005), 19th Century Geneva, censuses, acts of marriage, registers of deaths, register of migrations.



State sequences: an example

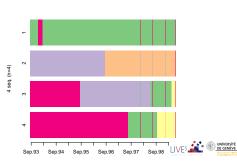
Transition from school to work, (McVicar and Anyadike-Danes, 2002)
 Monthly states: EM = employment, TR = training, FE = further education, HE = higher education, SC = school, JL = joblessness

Sequence

Compact representation

Sequence

- [1] (EM,4)-(TR,2)-(EM,64)
- [2] (FE,36)-(HE,34)
- [3] (TR,24)-(FE,34)-(EM,10)-(JL,2)
- [4] (TR,47)-(EM,14)-(JL,9)



Types of categorical sequences

Nature of sequences

Depends on

- Chronological order?
 - If yes, we can study timing and duration.
- Information conveyed by position j in the sequence
 - If position is a time stamp, differences between positions reflect durations.
- Nature of the elements of the alphabet
 - states, transitions or events, letters, proteins, ...



State versus event sequences

 An important distinction for chronological sequences is between

state sequences and event sequences

- A State, such as 'living with a partner' or 'being unemployed', lasts the whole unit of time
- An event, such as 'moving in with a partner' or 'ending education', does not last but provokes a state change, possibly in conjunction with other events.



State versus event sequences: examples

Time stamped events

Sandra	Ending education in 1980	Start working in 1980
Jack	Ending education in 1981	Start working in 1982

- There can be simultaneous events (see Sandra)
- Elements at same position do not occur at same time

State sequence view

year	1979	1980	1981	1982	1983
			. ,	Employed	
Jack	Education	Education	Education	Unemployed	Employed

- Only one state at each observed time
- Position conveys time information: All states at position 2 are states in 1980.



Sequencing, timing and duration

- For chronological sequences (with time dimension)
- The following three aspects are of interest:
 - Sequencing: Order in which the different elements occur.
 - Timing: When do the different elements occur?
 - Duration: How long do we stay in the successive states?
- Event sequences: Most useful when concern is sequencing.
- State sequences: Most useful when concern is duration.
- Both may be useful for timing questions.



The 'mvad' data set

- McVicar and Anyadike-Danes (2002)'s study of school to work transition in Northern Ireland.
- dataset distributed with the TraMineR library.
- 712 cases (survey data).
- 72 monthly activity statuses (July 1993-June 1999)

States are: EM Employment
 FE Further education
 HE Higher education
 JL Joblessness
 SC School
 TR Training.

- 14 additional (binary) variables
- The follow-up starts when respondents finished compulsory school (16 years old).

mvad variables

1	id	unique individual identifier		
2	weight	sample weights		
3	male	binary dummy for gender, 1=male		
4	catholic	binary dummy for community, 1=Catholic		
5	Belfast	binary dummies for location of school, one of five Education and Library Board		
		areas in Northern Ireland		
6	N.Eastern	"		
7	Southern	"		
8	S.Eastern	"		
9	Western	"		
10	Grammar	binary dummy indicating type of secondary education, 1=grammar school		
11	funemp	binary dummy indicating father's employment status at time of survey, 1=father		
12		unemployed		
12	gcse5eq	binary dummy indicating qualifications gained by the end of compulsory education, 1=5+ GCSEs at grades A-C, or equivalent		
13	fmpr	binary dummy indicating SOC code of father's current or most recent job,1=SOC1		
		(professional, managerial or related)		
14	livboth	binary dummy indicating living arrangements at time of first sweep of survey (June		
		1995), 1=living with both parents		
15	jul93	Monthly Activity Variables are coded 1-6, 1=school, 2=FE, 3=employment,		
		4=training, 5=joblessness, 6=HE		
	:	"		
86	jun99	"		



The mvad sequences are in STS form

• The mvad sequences are organized in STS form, i.e., each sequence is given as a (row) vector of consecutive states.

```
head(mvad[, 17:22])
```

```
Sep. 93
               Oct.93
                         Nov.93
                                    Dec.93
                                             Jan.94
                                                      Feb. 94
 employment employment employment training training
        FE
                   FE
                              FE
                                        FE
                                                 FE
                                                         FE
  training
            training
                      training
                                  training training training
                                  training training training
   training
            training
                       training
        FE
                   FE
                              FE
                                        FE
                                                 FE
                                                          FE
joblessness
             training
                        training
                                  training training training
```

 There are many other ways of organizing sequences data and TraMineR supports most of them.



Creating the state sequence object

- General TraMineR philosophy: Storing all reusable information on a set of sequences into a sequence object.
- Most TraMineR functions for state sequences require a state sequence object as input argument.
- The state sequence object contains
 - the sequences
 - and their attributes (alphabet, labels, colors, weights, ...)
- Hence, we first have to create this object



General philosophy: reused information in sequence object

Starting TraMineR and creating a state sequence object

• Load TraMineR and the mvad data.

```
library(TraMineR)
data(mvad)
```

• Check the alphabet (from Sept 93 to June 99; i.e., positions 17 to 86: We skip July-August 93)

```
(mvad.alph <- seqstatl(mvad[, 17:86]))
[1] "employment" "FE" "HE" "joblessness" "school"
[6] "training"</pre>
```

[6] "training"

Create the 'state sequence' object

```
mvad.lab <- c("employment", "further education", "higher education",
    "joblessness", "school", "training")
mvad.shortlab <- c("EM", "FE", "HE", "JL", "SC", "TR")
mvad.seq <- seqdef(mvad[, 17:86], alphabet = mvad.alph,
    states = mvad.shortlab, labels = mvad.lab, weights = mvad$weight,
    xtstep = 6)</pre>
```

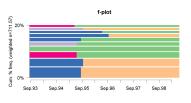
Main sequence object attributes and seqdef arguments

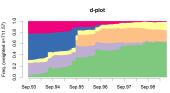
Attribute name	Description	Argument	Default	Retrieve/Set
	input format	informat=	"STS"	
alphabet	list of states	states=	from input data	alphabet()
cpal	color palette	cpal=	from RColorBrewer	cpal()
labels	long state labels	labels=	from input data	stlab()
cnames	position names	cnames=	from input data	names()
xtstep	jumps between tick marks	xtstep=	1	
row.names	row (sequence) labels	id=	from input data	rownames()
weights	optional case weights	weights=	NULL	
	missing handling	left=	NA	
	11	gaps=	NA	
	"	right=	"DEL"	

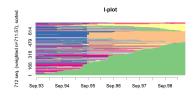


Rendering sequences

```
seqfplot(mvad.seq, withlegend = FALSE, title = "f-plot", border = NA)
seqdplot(mvad.seq, withlegend = FALSE, title = "d-plot", border = NA)
seqIplot(mvad.seq, withlegend = FALSE, title = "I-plot", sortv = "from.end")
seqlegend(mvad.seq, position = "bottomright", fontsize = 1.2)
```



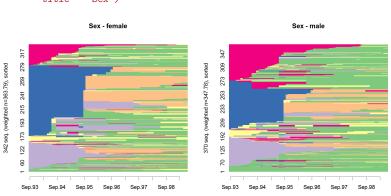


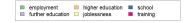






Rendering sequences by group (sex)







Characterizing set of sequences

 Sequence of cross-sectional measures (modal state, between entropy, ...)

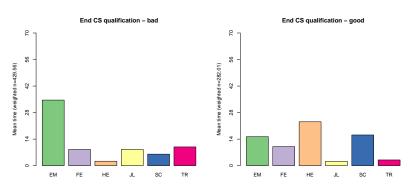
 Summary of longitudinal measures (within entropy, transition rates, mean duration ...)

 Other global characteristics: sequence medoid, diversity of sequences, ...

Mean time in each state

by qualification gained at end of compulsory school

 ${\tt seqmtplot(mvad.seq,\ group\ =\ mvad\$gcse5eq,\ title\ =\ "End\ CS\ qualification")}$







Sequence of cross-sectional distributions

For bad qualification at end of compulsory school, 9 months

```
segstatd(mvad.seg[mvad$gcse5eg == "bad", 6:15])
    [State frequencies]
   Feb.94 Mar.94 Apr.94 May.94 Jun.94 Jul.94 Aug.94 Sep.94 Oct.94 Nov.94
EM
    0.08
          0.094 0.100
                         0.11
                                0.13
                                      0.22
                                             0.23 0.211
                                                          0.231
                                                                0.244
    0.18
                               0.16
                                    0.13
FE.
         0.181 0.176
                       0.17
                                             0.14 0.212
                                                         0.211
                                                                0.209
HE.
    0.00 0.000 0.000 0.00
                               0.00
                                      0.00
                                             0.00 0.000
                                                         0.000
                                                                0.000
JL
    0.10 0.093 0.093 0.11
                               0.11
                                      0.16
                                             0.15
                                                  0.094
                                                          0.091
                                                                0.084
SC
    0.33 0.316 0.316
                       0.31
                               0.28
                                      0.17
                                             0.16 0.167
                                                         0.171
                                                                0.171
TR.
    0.31
          0.316 0.315
                         0.31
                                0.32
                                      0.32
                                             0.32
                                                   0.316
                                                          0.295
                                                                0.292
     [Valid states]
   Feb.94 Mar.94 Apr.94 May.94 Jun.94 Jul.94 Aug.94 Sep.94 Oct.94 Nov.94
N
            430
                   430
                          430
                                430
                                       430
                                              430
                                                     430
                                                           430
                                                                  430
     430
     [Entropy index]
   Feb.94 Mar.94 Apr.94 May.94 Jun.94 Jul.94 Aug.94 Sep.94 Oct.94 Nov.94
```

0.85

0.87

0.87

0.86

0.86

0.86

Н

0.82

0.83

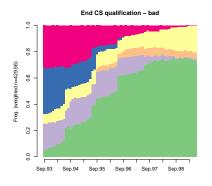
0.83

0.84

Sequence of cross-sectional distributions (chronogram)

by qualification gained at end of compulsory school

seqdplot(mvad.seq, group = mvad\$gcse5eq, title = "End CS qualification",
border = NA)





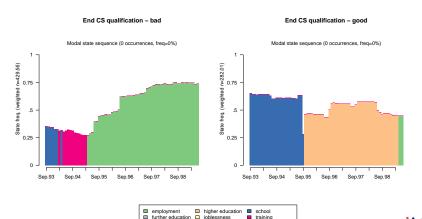




Sequence of modal states

by qualification gained at end of compulsory school

seqmsplot(mvad.seq, group = mvad\$gcse5eq, title = "End CS qualification",
border = NA)





Cross-sectional entropies

Time evolution of the Cross-sectional state diversity

```
seqplot.tentrop(mvad.seq, title = "End CS qualification",
    group = mvad$gcse5eq)
```



Longitudinal Characteristics

• Characteristics of individual sequences

seqlength()	length of the sequence
seqtransn()	number of transitions
seqsubsn()	number of sub-sequences
seqdss()	list of the distinct successive states (DSS)
seqdur()	list of the durations in the states of the DSS
seqistatd()	time in each state (longitudinal distribution)
seqient()	Longitudinal entropy
seqST()	Turbulence (Elzinga and Liefbroer, 2007)
seqici()	Complexity index (Gabadinho et al., 2011)

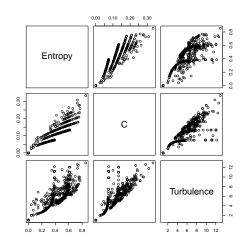


Complexity of the sequences

- To evaluate the complexity of a sequence we may consider
- Longitudinal entropy
 - does not account for the sequencing of the states (AABB and ABAB have same entropy)
- Turbulence (Elzinga and Liefbroer, 2007)
 - composite measure based on
 - the number of sub-sequences of the DSS sequence
 - the variance of the durations of the successive states
 - sensitive to state sequencing
- Index of complexity (Gabadinho et al., 2010, 2011)
 - composite measure based on
 - the number of transitions
 - the longitudinal entropy
 - sensitive to state sequencing



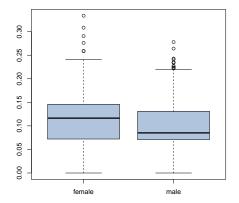
Comparing the measures





Distribution of complexity by sex

boxplot(mvad.cplx ~ mvad\$male, col = "lightsteelblue")





Summary of available distances

Distance	Method	Position-	Additional arguments
		wise	
Count of common			
attributes			
Simple Hamming	HAM	Yes	
Longest Common Prefix	LCP	Yes	
Longest Common Suffix	RLCP	Yes	
Longest Common	LCS	No	
Subsequence			
Edit distances			
Optimal Matching	OM	No	Insertion/deletion costs
			(indel) and substitution
			costs matrix (sm)
Hamming	HAM	Yes	substitution costs matrix (sm)
Dynamic Hamming	DHD	Yes	substitution costs matrix (sm)



Other distances

- There exist many other distances which will be made available in TraMineR in a near future.
 - Distances based on counts of common subsequences (Elzinga, 2003; Liefbroer and Elzinga, 2012; Oh and Kim, 2004)
 - Euclidean or Chi-squared distances between within-sequence state distributions, including over successive periods (Deville and Saporta, 1983; Grelet, 2002)
 - Variants of Optimal Matching (Hollister, 2009; Halpin, 2010)
 - OM of transitions instead of states (Biemann, 2011)



Dissimilarity matrix

TraMineR provides the seqdist function

[1] 712 712



Dissimilarity matrix

```
print(mvad.seq[1:4, ], format = "SPS")
    Sequence
[1] (EM,4)-(TR,2)-(EM,64)
[2] (FE,36)-(HE,34)
[3] (TR, 24) - (FE, 34) - (EM, 10) - (JL, 2)
[4] (TR, 47) - (EM, 14) - (JL, 9)
mvad.dist[1:4, 1:6]
     [,1] [,2] [,3] [,4] [,5] [,6]
[1,]
      0
           72
                 60
                      63
                           72
                                 33
[2,] 72
          0
                 86
                    135
                           11
                                104
[3,] 60 86 0
                      71
                           97
                                49
[4,]
      63
           135
                 71
                          135
                                 32
```

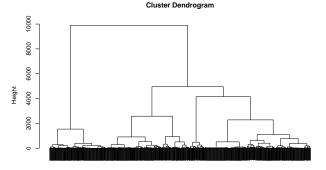


Cluster analysis

- Can run any clustering method which accepts a dissimilarity matrix as input.
- Many solutions in R:
- For hierarchical clustering
 - hclust() base function (can account for weights)
 - Package cluster (does not support weights!):
 - agnes(): agglomerative nesting (average, UPGMA WPGMA, ward, beta-flexible, ...)
 - diana(): divisive partitioning
- For PAM (partitioning around medoids) and other direct methods
 - Packages: cluster, fastclust, flashClust, ...
 - WeightedCluster (Studer, 2013)



Example: Hierarchical clustering (Ward)





PAM clustering

- PAM much faster, but must set a priori number k of clusters.
- WeightedCluster offers nice tools to help selecting k.
- k = 4 was found to be good choice.
- PAM with function wckMedoids from WeightedCluster

```
library(WeightedCluster)
set.seed(4)
pam.mvad <- wcKMedoids(mvad.dist, k = 4, weight = mvad$weight)</pre>
```

Cluster membership is in pam.mvad\$clustering

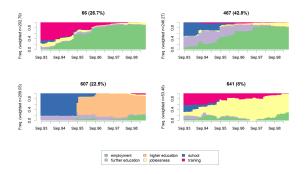
```
mvad.cl4 <- pam.mvad$clustering
table(mvad.cl4)

mvad.cl4
66 467 607 641
190 305 160 57</pre>
```



Labeling the PAM clusters

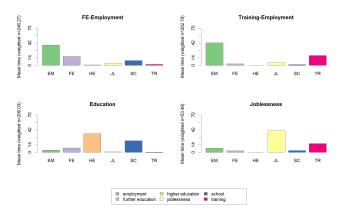
seqdplot(mvad.seq, group = group.p(mvad.cl4), border = NA)



Rearranging cluster order and defining labels

Mean time in each state

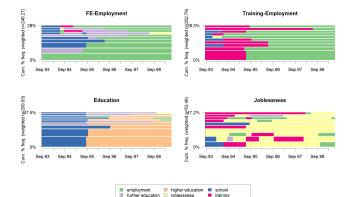
seqmtplot(mvad.seq, group = mvad.cl4.factor)





Most frequent sequences

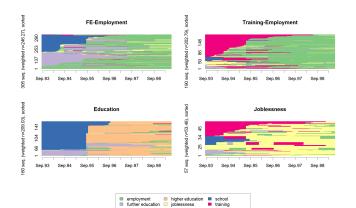
seqfplot(mvad.seq, group = mvad.cl4.factor, border = NA)





Individual sequences (sorted by states from start)

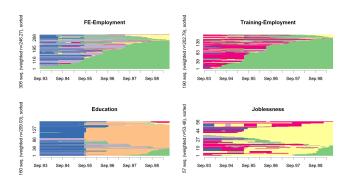
seqIplot(mvad.seq, group = mvad.cl4.factor, sortv = "from.start")





Sorted by states from the end

seqIplot(mvad.seq, group = mvad.cl4.factor, sortv = "from.end")



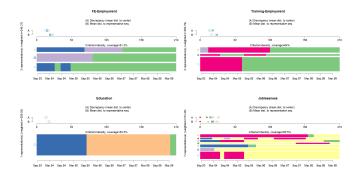
■ higher education ■ school

■ further education □ ioblessness



Representative sequences (Gabadinho et al., 2011)

Smallest set of patterns with given percentage of sequences in their neighborhood







Discrepancy of sequences

• Sum of squares *SS* can be expressed in terms of distances between pairs

$$SS = \sum_{i=1}^{n} (y_i - \bar{y})^2 = \frac{1}{n} \sum_{i=1}^{n} \sum_{j=i+1}^{n} (y_i - y_j)^2$$
$$= \frac{1}{n} \sum_{i=1}^{n} \sum_{j=i+1}^{n} d_{ij}$$

- Setting d_{ii} equal to OM, LCP, LCS ... distance, we get SS.
- From which we can measure the dispersion with the pseudo-variance SS/n.
- And run ANOVA analyses (Studer et al., 2011, 2010, 2009).





Computing the dispersion

For the whole set of sequences

```
dissvar(mvad.dist)
```

[1] 32.06

• By Cluster (dissvar.grp from library TraMineRextras)

```
data.frame(Dispersion = dissvar.grp(mvad.dist, group = mvad.cl4.factor))
```

	Dispersion
FE-Employment	18.60
Training-Employment	17.89
Education	15.90
Joblessness	27.14



Analysis of sequence discrepancy

Running an ANOVA-like analysis for gcse5eq

```
da <- dissassoc(mvad.dist, group = mvad$gcse5eq, R = 1000)
print(da)</pre>
```



ANOVA output

Pseudo ANOVA table:

```
SS
                   df
                         MSE
       Exp
             1952
                    1 1952.4
            20871 710 29.4
       Res
       Total 22823 711 32.1
       Test values (p-values based on 1000 permutation):
                       t0 p.value
       Pseudo F
                 66.41934 0.001
       Pseudo Fbf 67.37188 0.001
       Pseudo R2 0.08555 0.001
       Bartlett 0.14693 0.339
                  0.77397
                            0.403
       Levene
       Inconclusive intervals:
       0.00383 < 0.01 < 0.0162
       0.03649 < 0.05 < 0.0635
       Discrepancy per level:
              n discrepancy
       bad
            452
                      29.76
            260
                      28.53
       good
1/7/2013gr fotal 712
                      32.06
```

Growing a sequence regression tree



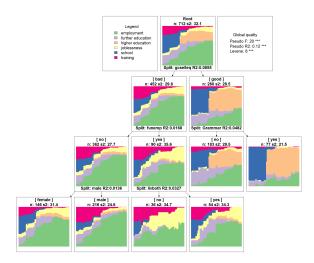
Graphical tree

The graphical rendering uses Graphviz http://www.graphviz.org/

• The plot is produced as a png file and displayed with the default program associated to this extension.

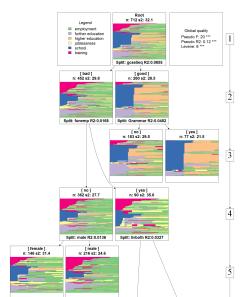


Graphical Tree





Graphical Tree, using I-plots and showdepth=TRUE

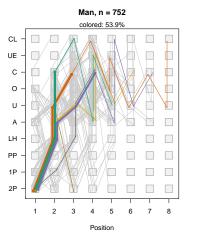


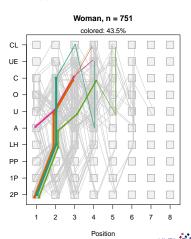


Rendering event sequences

Swiss cohabitational trajectories, data from 2002 SHP biographical survey

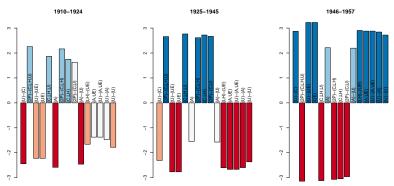
Plot of event sequences, patterns with at least 5% support are colored





Event sequences: discriminating sub-sequences By birth cohort

Pearson's residuals by decreasing discrimination power



Color by sign and significance of Pearson's residual





TraMineR was made possible thanks to SNF

- Developed within the SNF (Swiss National Fund for Scientific Research) project Mining event histories: Towards new insights on personal Swiss life courses 1/2007-1/2011
- ... development goes on within IP 14 methodological module of the NCCR LIVES: Overcoming vulnerability: Life course perspectives (http://www.lives-nccr.ch).



TraMineR, Who?

- Under supervision of a scientific committee:
 - Gilbert Ritschard (Statistics for social sciences)
 - Alexis Gabadinho (Demography)
 - Nicolas S. Müller (Sociology, Computer science)
 - Matthias Studer (Economics, Sociology)
- Additional members of the development team:
 - Reto Bürgin (Statistics)
 - Emmanuel Rousseaux (KDD and Computer science)

both PhD students within NCCR LIVES IP-14



Other packages by the TraMineR team

- TraMineRextras additional less stabilized functions
- PST (Probability suffix trees) by Alexis Gabadinho
- WeightedCluster (Studer, 2013)
- Dataset (handling and documenting survey data sets) by Emmanuel Rousseaux



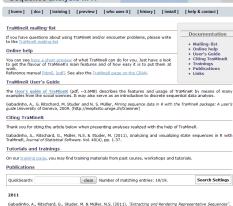
Documentation

- The success of TraMineR is largely due to the documentation.
- Web page http://mephisto.unige.ch/traminer
 - News (new release, ...)
 - Preview
 - Documentation:
 - User's guide (about 120 pages)
 - Tutorials
 - Web page (html) of the Reference manual
 - Papers by the TraMineR team
 - Publications by TraMineR users
 - Information about forthcoming training courses



TraMineR

Sequence analysis in R



Gabadinho, A., Ritschard, G., Studer, M. & Müller, N.S. (2011), "Estracting and Rendering Representative Sequences", In Fred, A., Dietz, J.L.G., Liu, K. & Flipe, J. (celd) Knowledge Discovery, Knowledge Engineering And Rowledge Management. Series: Communications in Computer and Information Science (CCIS). Volume 128, pp. 94-106. Springer-Verlag.

[Abstract] [BibTeX] [DOI] [Preprint (pdf)]

Gabadinho, A., Ritschard, G., Müller, N.S. & Studer, M. (2011), "Analyzing and visualizing state sequences in R with TraMineR", Journal of Statistical Software, Vol. 40(4), pp. 1-37.



R-forge page

- TraMineR page on R-forge (https://r-forge.r-project.org/projects/traminer/)
- where you
 - find the development version
 - can post bug reports,
- Can join the discussion list (but broken search!)



Where asking for help?

- Best place for help is StackExchange
- There are traminer tags on
 - StackOverflow (SO)
 http://stackoverflow.com/questions/tagged/traminer
 for TraMineR R-code related questions
 - CrossValidated (CV)
 http://stats.stackexchange.com/questions/tagged/traminer
 for questions regarding statistical interpretation and methodological issues



Thank you!



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