Demonstration Document Dotchartplus: Why and How

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1 Introduction

Dotcharts are used to plot one quantitative variable with labels (Cleveland, 1985) and has many advantages over other ways of displaying labeled data. A flexible method for drawing dotcharts in R is presented in A Literate Program for Drawing Dotcharts (dotchartplus.pdf), which covers the technical details of the code. This is a Demonstration Document that discusses why you should use a dotchart, how dotchartplus differs from dotchart (built-in R function) and dotplot (from the 'lattice' R package), and gives some examples on how to use dotchartplus. The figures will often have accompanying code that will produce a similar plot. Only the important arguments are shown, so the actual result will vary slightly. Many of the examples used for demonstration intentionally replicate or mimic dotcharts found in Cleveland, W. S. (1985) The Elements of Graphing Data, to demonstrate that such figures can be drawn using dotchartplus.

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2 Examples

2.1 Dotchart vs Standard Graphs

2.1.1 Dotchart vs Barplot

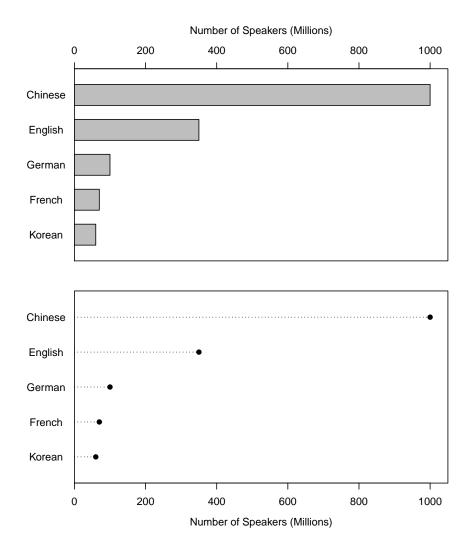
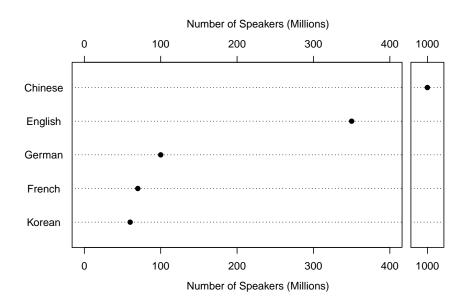


Figure 1: The numerical axis starts at 0 because the barplot is only meaningful when the length of the bars correspond to the data values. A dotchart can convey the same information, but with less ink. The call is: dotchartplus(rev(mother.tongue))



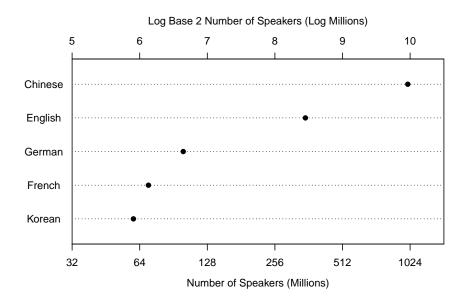


Figure 2: Unlike the barplot, a dotchart has flexibility on the numerical axis. This can include having breaks in the axis (top) or using a log scale (bottom). These types of plots are often inappropriate or misleading as barplots. The calls are:

dotchartplus(rev(mother.tongue), xlim = list(c(0, 400), c(980, 1020))) dotchartplus(rev(log2(mother.tongue)))

2.1.2 Dotchart vs Population Pyramid

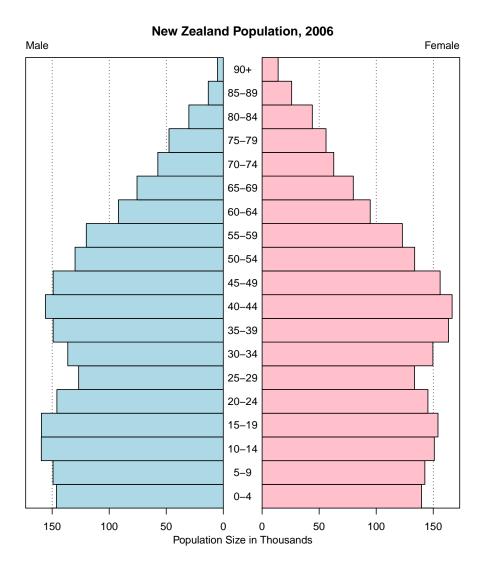


Figure 3: A population pyramid is often used to display the distribution of the population across age groups and between genders. In a growing population, the result looks like a pyramid as there will be less people as you move up the age groups. Unfortunately, the numerical axes for Male and Female go in opposite directions, which can make direct comparisons between the two difficult. The reader must frequently consult the axis labels.

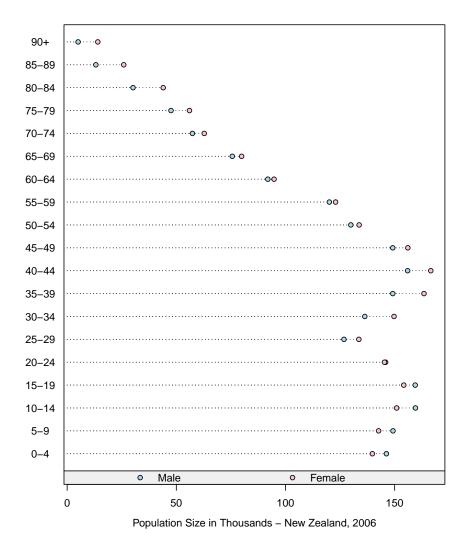
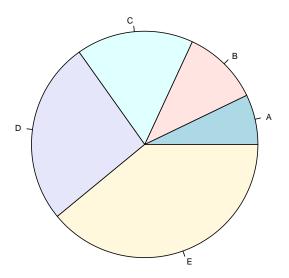


Figure 4: A dotchart provides an alternative to the population pyramid and has the advanage of being able to superpose multiple *sets* of data on a single plot. This makes direct comparisons between the two genders at each age group incredibly easy. The call is:

dotchartplus(nzpoplist[[12]], col = c("lightblue", "pink"))

2.1.3 Dotchart vs Piechart



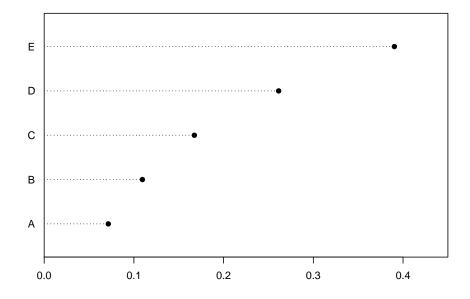
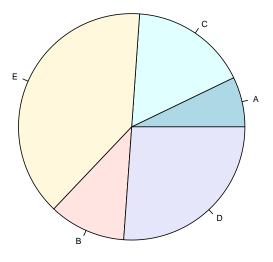


Figure 5: A piechart is a common tool for examining proportions. However, comparisons between slices require comparisons of angles or areas. These are far less accurate than judgements on lengths. This data happens to have the values sorted in ascending order, thus it is clear that group B has a larger proportion than group A even on the piechart.



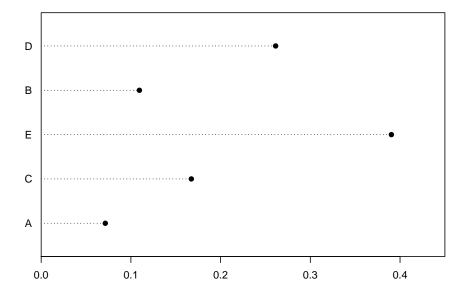


Figure 6: However, when the data is not sorted, it is not so easy to determine which is the larger proportion on the piechart. In contrast, the dotchart gives accurate readings of the actual proportions regardless of whether or not the data is sorted. It should also be noted that a piechart must be a perfect circle to be a proper piechart (not an ellipse). This is a cumbersome restriction that the dotchart does not have.

2.2 Dotchartplus vs Other Methods

2.2.1 Dotchartplus vs Dotchart

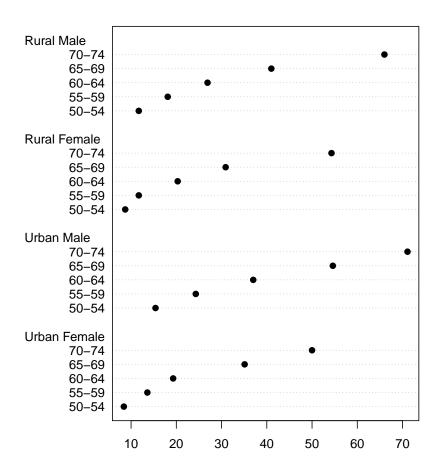


Figure 7: R's built-in dotchart function is a perfectly good function for plotting basic dotcharts. It also has the capacity to juxtapose *groups* of data. Refer to help(dotchart) for more information. The call is: dotchart(VADeaths)

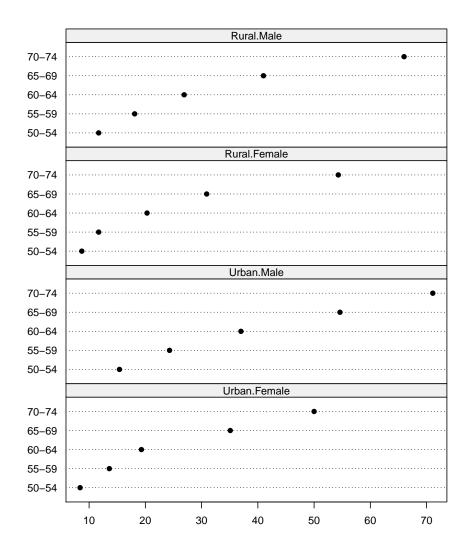


Figure 8: While there are some stylistic differences, dotchartplus is capable of doing everything dotchart can, and more. It's worth noting that the handling of matrix inputs differ between the two functions. In dotchart, columns of a matrix are taken to mean groups of data to juxtapose. In dotchartplus, columns are taken to mean sets of data to superpose. To juxtapose in dotchartplus, the data should be organised into a list, where each element of the list are taken to mean groups of data to juxtapose. Equivalently, a data.frame can be used, which has the advantage that the columns of a data.frame correspond to groups of data. Unfortunately, converting a matrix to a data.frame will strip the row.names, which are used as the text labels. The call is:

dotchartplus(data.frame(VADeaths), rep(list(row.names(VADeaths)), 4))

2.2.2 Dotchartplus vs Dotplot

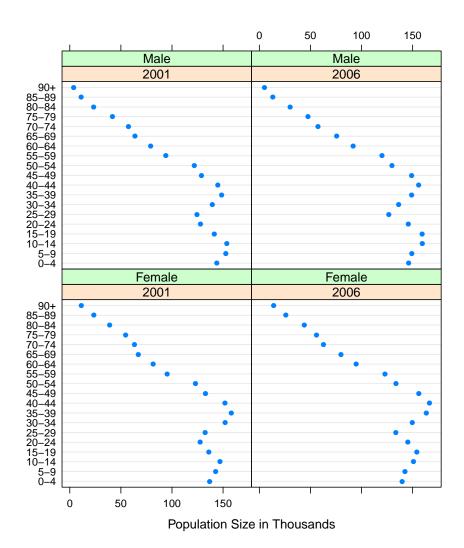


Figure 9: The dotplot function from the 'lattice' R package is a powerful function with many capabilities. In particular, it juxtaposes both horizontally and vertically, allowing for it to condition on many factors at the same time. It can also take more than one conditioning variable. Since dotplot does these things so well, there is no point in trying to compete with dotchartplus. The call is:

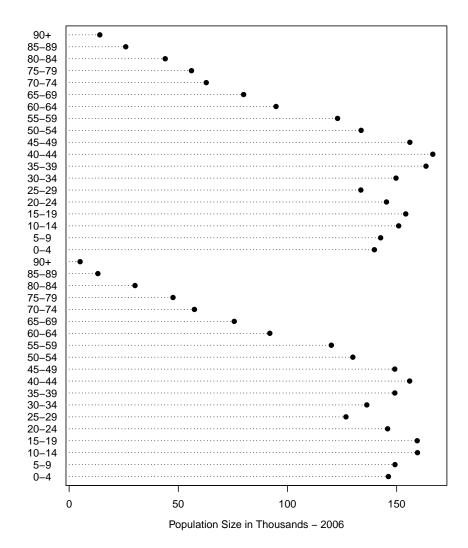


Figure 10: There is a note worthy difference in how dotplot and dotchartplus handle labels. First, dotchartplus takes its inputs very literally, so if the labels happen to be a factor, it will take these to be integers. The user must manually convert these to character by calling as.character if they want sensible labels. Further, this 'literal' processing means that even if one or more of the labels are the same, dotchartplus will simply plot them again. On the other hand, dotplot consolidates the labels and will superpose data with the same label (try it yourself using the same call as below, but using dotplot). The call is: dotchartplus(as.character(group) ~ freq,

```
data = nzpopdf[nzpopdf$year == 2006,],
xlab = "Population Size in Thousands")
```

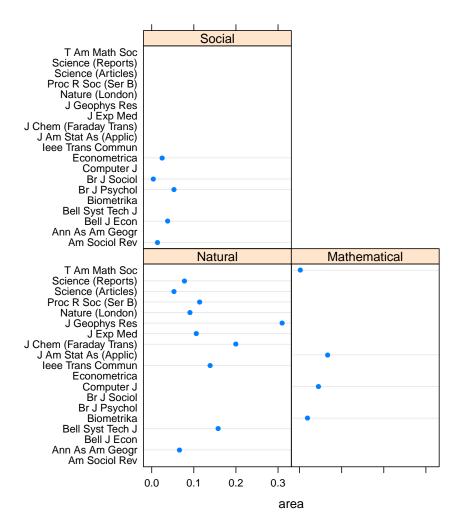


Figure 11: Because dotplot juxtaposes horizontally as well as vertically and automatically consolidates labels, it can draw some truly weird graphs as in this figure. dotplot expects an observation for each label at every level of the conditioning factor(s), but in this case the conditioning factor is a grouping variable and labels are not repeated. Further, by juxtaposing horizontally, it is harder to compare the values in 'Mathematical' to the other two groups. The call is:

dotplot(journal ~ area | science, data = jg)

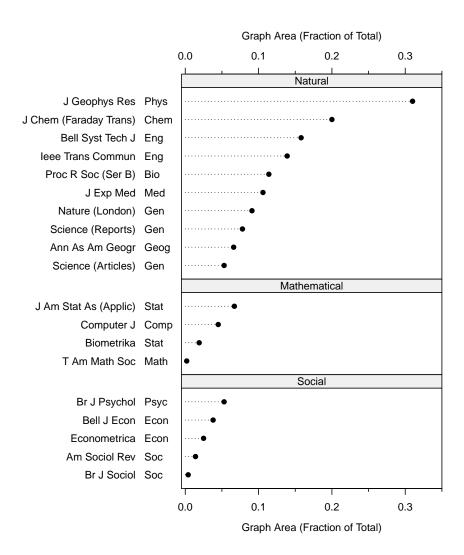


Figure 12: In comparison, dotchartplus only juxtaposes vertically and handles labels 'literally', making it ideal for plotting this kind of data. However, juxtaposing only vertically limits the number of levels the conditioning factor can have, for the simple reason that eventually the plot will become too squashed. In addition, dotchartplus can only handle one conditioning variable, whereas dotplot can handle many. Likewise, there are things that dotchartplus can do that dotplot can't, such as having multiple columns of text labels. The moral of the story is, deciding whether to use dotplot or dotchartplus should depend on what kind of plot the user desires. The call is: dotchartplus(journal + subject ~ area | science, data = jg)

2.3 Additional examples

By now, the reader should have a grasp on the calls required to plot dotcharts, either using dotchart, dotchartplus or dotplot. This subsection gives several more examples, showing off various features of dotchartplus.

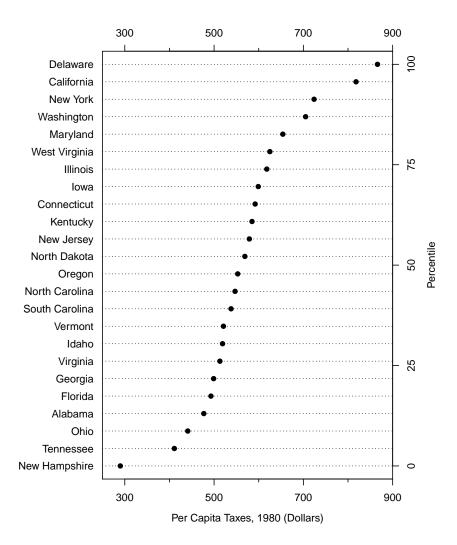


Figure 13: A plot designed to mimic the dotchart found in **The Elements of Graphing Data** (Cleveland, 1985, p147). The original data contains 48 states, but for the purposes of this document, only half the states (24) are used. "When the data are ordered from smallest to largest, the dotchart provides a percentile graph" (Cleveland, 1985, p147). The call is: dotchartplus(taxes, percentile = TRUE)

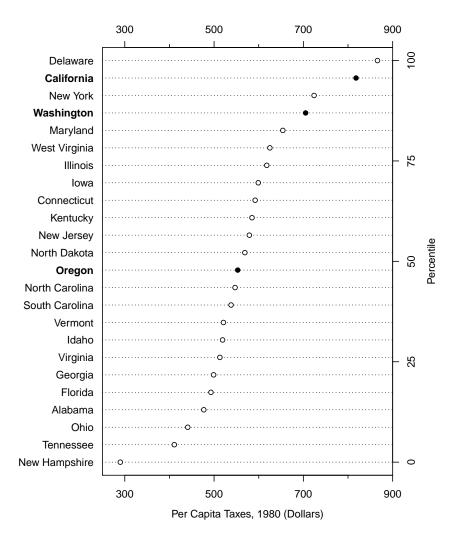


Figure 14: It is possible to highlight specific points easily in dotchartplus using the highlight argument. Here we choose to highlight the 3 states on the west coast of the US: Oregon (point 12), Washington (21) and California (23). The highlight argument can take a numeric vector specifying the indices of the points to highlight. The call is:

dotchartplus(taxes, highlight = c(12, 21, 23))

Note that because the dataset used here is a subset of the full data, the indices of the chosen states will not be the same. They will instead be: Oregon (23), Washington (41), California (46).

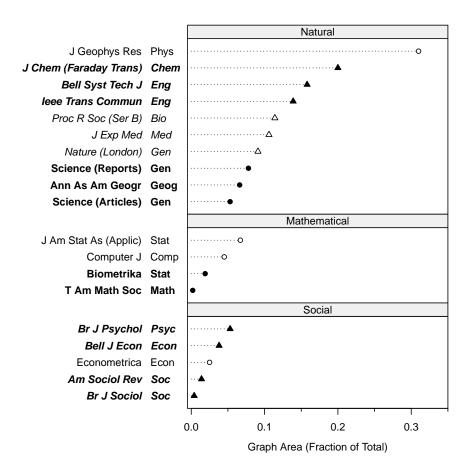


Figure 15: This figure is used to demonstrate how to make a more complex call using highlight. The call is:

Each element of the list highlights the matching group. For each element of the list, one can specify a subsetting numeric vector, or multiple numeric vectors as columns of a matrix. Each column of the matrix will specify a distinct highlighting method (to the extent specified in DefaultParslist). As a matrix requires the same number of rows for each column, one can use 0 as a filler. As with subsetting in R, one can specify a negative index to signify every value except for that index. Full documentation on the usage of highlight can be found in the literate document for dotchartplus.

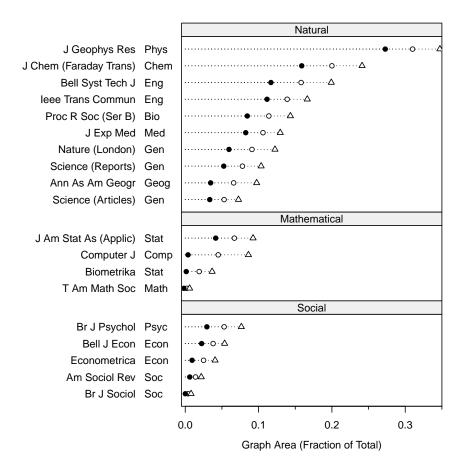


Figure 16: The data used in Figures 12 and 15 also contains a column called stderr. Naturally, this makes us want to plot confidence intervals. While a normality assumption may be questionable, we will use it anyway for demonstration purposes. We will do the popular 95% Confidence Interval by taking 1.96 times the standard error on either side. The formula method of calling dotchartplus allows specification of multiple sets of data by simply adding them in using +, so plotting the thing isn't too hard, but it certainly doesn't look very good. The call is:

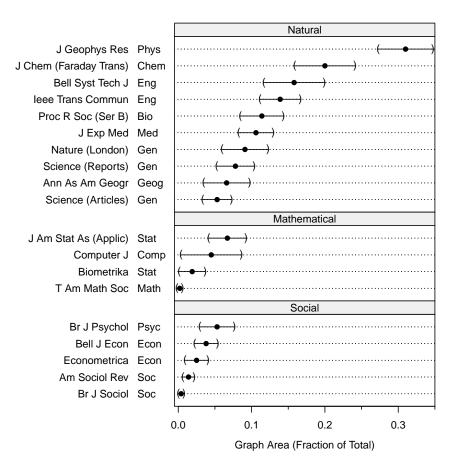


Figure 17: dotchartplus has a significant number of optional arguments that allow for extensive customisation of the output. The first thing we can change are the point types (pch) to something more fitting a confidence interval. The numbers 40 and 41 correspond to '(' and ')', which seem adequate. The other thing we can do is make the line inside the interval stand out more. This can be accomplished by specifying a custom points function (pfunc). One such function is defined in Subsection 3.3 called pointsCI, which will draw such a line for us. Our call now looks like this:

3 Helpful Code

On Literate Programs

This software is presented as a *literate program* written in the *noweb* format. It serves as both documentation and as a container for the code. A single noweb file can be used to both produce the *literate document* pdf file and to extract executable code. The document is separated into *documentation chunks* and named *code chunks*. Each *code chunk* can contain code or references to other *code chunks* which act as placeholders for the contents of the respective *code chunks*. As the name serves as a short description of the code, each *code chunk* can give an overview of what it does via the names it contains, leaving the reader free to delve deeper into the respective *code chunks* for the code if desired.

3.1 Code Overview

The default method covered in the literate document can be quite technical, so we will also be adding some easier interfaces (called *Call Methods*), including a formula interface that many R users should be familiar with. This section also contains the *Demonstration Functions* and *Included Datasets*.

```
19a \langle dotchartplus\text{-}demos.R \ 19a \rangle \equiv \langle document \ header \ 26b \rangle \langle Call \ Methods \ 19b \rangle \langle Demonstration \ Functions \ 21 \rangle \langle Included \ Datasets \ 27 \rangle This code is written to file dotchartplus-demos.R.
```

3.2 Call Methods

The default method can actually handle a variety of object types, the only requirement being that they are first put in a list.

Thus, we can add support for matrix and vectors of type integer, numeric and logical, simply by specifying a trivial function that places the object in a list, and then passing on all the arguments.

Adding support for formula is quite a bit more complicated. The following code is partially based off the formula method for the boxplot function.

It uses the parseFormula function by Ross Ihaka to separate the formula into component parts: the data, labels and groups (see formula.pdf for more information). These are used to form the list format required by the default dotchartplus method. The formula can either be symbolic (names of variables in a data.frame specified in data) or the actual data itself, as is usual for other formula based calls in R. The labels and group can be specified either as part of the formula object, or separately as the arguments.

20

```
\langle define \ method \ for \ formula \ 20 \rangle \equiv
    setMethod("dotchartplus", signature(object = "formula"),
               function(object, labels = NULL, group = NULL,
                        data = NULL, ...)
        m <- match.call(expand.dots = FALSE)</pre>
        ## Parse formula
        form.d = parseFormula(object)
        ## Adjust elements of m to required model.frame form
        m$formula = substitute(~ vals,
           list(vals = substitute(do.call("cbind", subs),
                  list(subs = form.d$rhs))))
        m$object = NULL
        if(!is.null(form.d$lhs))
           m$labels = substitute(do.call("cbind", subs),
                        list(subs = form.d$lhs))
        if(!is.null(form.d$condition))
           m$group = form.d$condition[[1]]
        ## Convert to model.frame and evaluate
        m$... <- NULL
        m[[1L]] <- as.name("model.frame")</pre>
        mf <- eval(m, parent.frame())</pre>
        datcol = 1
        textcol = which(names(mf) == "(labels)")
        splitcol = which(names(mf) == "(group)")
        ## If group specified, split
        if(length(splitcol) != 0){
           datlist = split(data.frame(mf[,datcol]), mf[,splitcol])
           #datlist = split(mf[,datcol, drop = FALSE], mf[,splitcol])
           textlist = if(length(textcol) != 0)
             split(data.frame(mf[,textcol]), mf[,splitcol])
           else NULL
        } else{
           datlist = list(mf[,datcol])
           textlist = if(length(textcol) != 0)
```

list(data.frame(mf[,textcol]))

```
else NULL
}

dotchartplus(object = datlist, textlist = textlist, ...)
}
)
```

3.3 Demonstration Functions

Certain Auxiliary Functions that may be useful are also included here. We also define a trivial function (dotchartplus.runtests) that runs each demo function in sequence in a single call.

```
\langle Demonstration Functions 21 \rangle \equiv
21
               \langle Auxiliary Functions 22 \rangle
               \langle mother tongue 23 \rangle
               \langle journal graphs 24 \rangle
               \langle taxes 25a \rangle
               \langle radiation 25b \rangle
               \langle animalSpeed 25c \rangle
               \langle nzpop 26a \rangle
               dotchartplus.runtests =
                 function(...){
                    demofuncs = ls(.GlobalEnv, pattern = "dotchartplus.demo")
                    for(func in demofuncs){
                       print(func)
                       eval(parse(text = paste(func, "()", sep = "")))
                       readline("Hit enter to run the next test.")
                 }
```

- lfuncBar a lfunc (line function) that draws a rectangle instead of dotted lines. This is used to plot a barplot using dotchartplus (see demo1.bar).
- idnfunc the I Do Nothing function. This is used to suppress actions. It can be used as the pfunc (point function) to suppress points when drawing barplots (see demo1.bar). It can also be used as the lfunc to suppress lines, although that can also be accomplished by setting lty = 0.
- pointsCI a pfunc (points function) that draws Confidence Intervals. Refer to Figure 17.
- dcpTranspose A method of 'transposing' or flipping a datlist, switching what is juxtaposed and what is superposed (compare demo6.yearBYgender and demo6.genderBYyear).

```
\langle Auxiliary Functions 22 \rangle \equiv
22
           lfuncBar = function(x1, yb, xr, yt, ...)
             rect(x1, yb - 0.3, xr, yt + 0.3, ...)
           idnfunc = function(...)
             NULL
          pointsCI = function(x, y, pch, ...){
             segments(x[pch == 40], y[pch == 21], x[pch == 41], y[pch ==21])
             points(x, y, pch = pch, ...)
           dcpTranspose = function(datlist){
             datlist = lapply(datlist, as.matrix)
             newlist = list()
             for(i in 1:ncol(datlist[[1]]))
               newlist[[i]] = sapply(datlist, function(x) x[,i])
             names(newlist) = dimnames(datlist[[1]])[[2]]
             newlist
```

Demonstration functions using the mother.tongue data.

```
\langle mother tongue 23 \rangle \equiv
23
          dotchartplus.demo1 =
             function(...)
            dotchartplus(rev(mother.tongue), axes = 1:3,
                          xlim = c(0, 1000),
                          xlab = "Number of Speakers (Millions)", ...)
          dotchartplus.demo1.prop =
             function(...)
             dotchartplus(rev(mother.tongue[-1]/max(mother.tongue)),
                          axes = 1:3, xlim = c(0, 0.35),
                          lab1 = paste("Number of Language Speakers,",
                            "proportional to\nThe Number of Chinese",
                            "Speakers (1 Billion)"), ...)
          dotchartplus.demo1.xlim =
            function(axes = 1:3, ...)
             dotchartplus(rev(mother.tongue), axes = axes,
                          xlim = list(c(0, 400), c(980, 1020)),
                          at = list(NULL, 1000),
                          xlab = "Number of Speakers (Millions)",
                          ...)
          dotchartplus.demo1.log =
             function(axes = 1:3, ...){
               mt.log = log2(mother.tongue)
               dotchartplus(rev(mt.log), axes = axes, xlim = c(5, 10.5),
                            xaxs = "i", at = 5:11, atlabels1 = 2^(5:11),
                            lab1 = "Number of Speakers (Millions)",
                            lab3 = paste("Log Base 2 Number of",
                              "Speakers (Log Millions)"), ...)
            }
          dotchartplus.demo1.bar =
             function(lcol = "grey", lty = 1, ...)
             dotchartplus(rev(mother.tongue), axes = 1:3,
                          xlim = c(0, 1000),
                          xlab = "Number of Speakers (Millions)",
                          lfunc = lfuncBar, lcol = lcol, lty = lty,
                          pfunc = idnfunc, ...)
```

Demonstration functions using the jg data.

Two functions are provided to plot the same figure, one using the default dotchartplus list method, the other using the formula method.

```
24
      \langle journal graphs 24 \rangle \equiv
          dotchartplus.demo2 =
             function(axes = 1:3, \dots){
              ## factor groups into Natural, Mathematical, Social
              jg$science = factor(jg$science,
                 levels = c("Natural", "Mathematical", "Social"))
              ## sort by area
              jg.sort = jg[order(jg$area),]
              ## separate into textlist and datlist
              ## split into science groups
              jg.textlist = split(jg.sort[,1:2], jg.sort$science)
              jg.datlist = split(jg.sort[,4], jg.sort$science)
              dotchartplus(jg.datlist, jg.textlist, axes = axes,
                            xlim = c(-.005, 0.35), xaxs = "i",
                            xlab = "Graph Area (Fraction of Total)",
                            adj = c(1, 0), at = (0:3)/10,
                            atsmall = (0:3)/10 + 0.05, \ldots
            }
          dotchartplus.demo2.formula =
             function(...){
              ## factor groups into Natural, Mathematical, Social
              jg$science = factor(jg$science,
                 levels = c("Natural", "Mathematical", "Social"))
              dotchartplus(journal + subject ~ area | science,
                            data = jg, axes = 1:3,
                            xlim = c(-.005, 0.35), xaxs = "i",
                            xlab = "Graph Area (Fraction of Total)",
                            adj = c(1, 0), at = (0:3)/10,
                            atsmall = (0:3)/10 + 0.05, \ldots
            }
          dotchartplus.demo2.CI =
             function(...){
              dotchartplus(journal + subject ~ area + I(area - 1.96 * stderr) +
                            I(area + 1.96 * stderr) | science, data = jg,
                            setslabel = FALSE, axes = 1:2,
                            xlim = c(-.005, 0.35), xaxs = "i",
                            xlab = "Graph Area (Fraction of Total)",
                            adj = c(1, 0), at = (0:3)/10,
                            atsmall = (0:3)/10 + 0.05, full.lines = TRUE,
                            pfunc = pointsCI, pch = c(21, 40, 41))
```

```
}
          Demonstration function using the taxes data.
       ⟨taxes 25a⟩≡
25a
            dotchartplus.demo3 =
              function(...)
              dotchartplus(taxes, axes = 1:3, xlim = c(250, 900),
                            xaxs = "i", adj = 1, percentile = TRUE,
                            lab1 = "Per Capita Taxes, 1980 (Dollars)",
                             atsmall = seq(400, 800, length = 3),
                             at = seq(300, 900, length = 4), ...)
          Demonstration function using the radiation data.
       \langle radiation 25b \rangle \equiv
25b
            dotchartplus.demo4 =
              function(...)
              dotchartplus(radiation, lty = 0, axes = 1:3,
                lab1 = "Log Base 10 (Extragalactic / Galactic)", ...)
          Demonstration functions using the animalSpeed data.
          The data is in miles, but we convert it to km to match the figure in Cleveland.
       \langle animalSpeed 25c \rangle \equiv
25c
            dotchartplus.demo5 =
              function(...)
              dotchartplus(rev(animalSpeed * 1.6093), adj = 1,
                             axes = 1:3, lab1 = "Speed (km/hr)", ...)
            dotchartplus.demo5.xlim =
              function(...)
              dotchartplus(rev(animalSpeed * 1.6093),
                            xlim = list(c(0, 2), c(12.5, 112.5)),
                             at = list(c(0, 2), seq(25, 100, by = 25)),
                             atsmall = list(1,
                               seq(12.5, 112.5, by = 12.5)),
                             widths = c(1, 4), adj = 1, axes = 1:3,
```

lab1 = "Speed (km/hr)", ...)

function(subs = $c("1951", "2006"), ...){$

Demonstration functions using the nzpop data.

```
nzpopsubmat = sapply(nzpoplist[subs],
   function(x) apply(x, 1, sum))
nzpopsubmat.scaled = sweep(nzpopsubmat, 2,
   apply(nzpopsubmat, 2, sum), "/")
xlab =
   "Proportion of New Zealand Population per Age Group"
dotchartplus(nzpopsubmat.scaled, xlab = xlab, ...)
}
```

```
dotchartplus.demo6.babies =
  function(...){
   babies = dcpTranspose(lapply(nzpoplist, function(x)
      apply(x, 1, sum)))[[1]][1,][1:12]
   xlab = paste("New Zealand Population in Thousands",
      "between 0-4 years old")
   dotchartplus(babies, xlab = xlab, ...)
}
```

```
dotchartplus.demo6.genderBYyear =
  function(subs = c("1951", "2006"), ...){
    xlab = "New Zealand Population Size in Thousands"
    dotchartplus(nzpoplist[subs], xlab = xlab, ...)
}
```

We place a document header at the top of the extracted code to encourage people to read the literate description.

26b $\langle document \ header \ 26b \rangle \equiv$

```
## The code in this .R file is machine generated.
```

To understand the program, read the literate description

pdf rather than studying just the R code.

3.4 Included Datasets

27

With the exception of the NZ Census data and the Language Speakers data, these are the same data used in Cleveland, W. S. (1985) **The Elements of Graphing Data**. The Language Speakers data is similar to the one used in the book, but not exactly the same. Sources are given where available, others were given to me from Ross Ihaka without a specified source.

```
\langle Included\ Datasets\ 27 \rangle \equiv
    ##-----
    ## Datasets (from Ross)
    ## Per Capita Taxes
    ## From Cleveland's "The Elements of Graphing Data",
    ## First Edition. Page 147.
    ## Data captured by scanning and the use of "g3data".
    ## I have deliberately left the values unrounded.
    taxes =
        round(c(290.016639308, 392.12318715, 410.645447819, 425.771230625,
                440.896757637, 474.890185047, 476.997116578, 490.991081152,
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    names(taxes) =
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        "Oregon", "Montana", "North Dakota", "Louisiana", "New Jersey",
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        "Iowa", "Pennsylvania", "Illinois", "Arizona", "West Virginia",
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    # Source: The Cambridge Factfinder, Cambridge University Press, 1993
    mother.tongue =
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"French", "Panjabi", "Javanese", "Bihari", "Italian",
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## Page 146, Elements, 1st Ed
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                                 "Microwaves", "Radio Emission"))
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            .Names = c("Cheetah", "Pronghorn Antelope", "Wildebeest",
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                       "Wild Turkey", "Squirrel", "Pig (domestic)",
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jg =
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             "Educ Res", "J Polit Econ", "Bell J Econ",
             "Am Econ Rev", "Am Educ Res", "Br J Psychol",
             "J Exp Psychol", "Percept Psychophys",
             "T Am Math Soc", "Ann Statist", "Computer",
             "Biometrika", "Commun Acm", "Am Math Mo",
             "Computer J", "J Am Stat As (Theory)",
             "Comput Gra Im Proc", "J Am Stat As (Applic)",
             "J R Stat Soc (Ser C)", "Cell", "Science (Articles)",
             "Geogr Rev", "Geogr J", "Ann As Am Geogr",
             "New Eng J Med", "Ibm J Res Develop",
             "Science (Reports)", "Lancet", "Profess Geogr",
             "Nature (London)", "Phys Rev (A)", "J Am Chem Soc",
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"J Exp Med", "Phys Rev (Lett)", "Scientific Am",
   "Proc R Soc (Ser B)", "J Physics (C)",
   "J Clin Investigation", "Ieee Trans Commun",
   "J Phys Chem", "Life Sciences", "Bell Syst Tech J",
   "Ieee Comm Radar Sig", "J Appl Physics",
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    \dim = c(19, 23, 2),
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      sex = c("Male", "Female")))
## Turn array into a more useful form
nzpoplist = list()
for(i in 1:23)
  nzpoplist[[i]] = nzpop[,i,]
names(nzpoplist) = dimnames(nzpop)$year
## Or data.frame
nzpopdf = with(dimnames(nzpop), {
  nzpgroup = factor(rep(group, times = 23 * 2), levels = group)
 nzpyear = rep(rep(as.numeric(year), each = 19), times = 2)
  nzpsex = rep(sex, each = 19 * 23)
  data.frame(freq = as.vector(nzpop),
             group = nzpgroup, year = nzpyear, sex = nzpsex)
})
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