

# Introduction to R: Session 01

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<sup>a</sup>Private webpage: [uncertaintree.github.io](https://uncertaintree.github.io)

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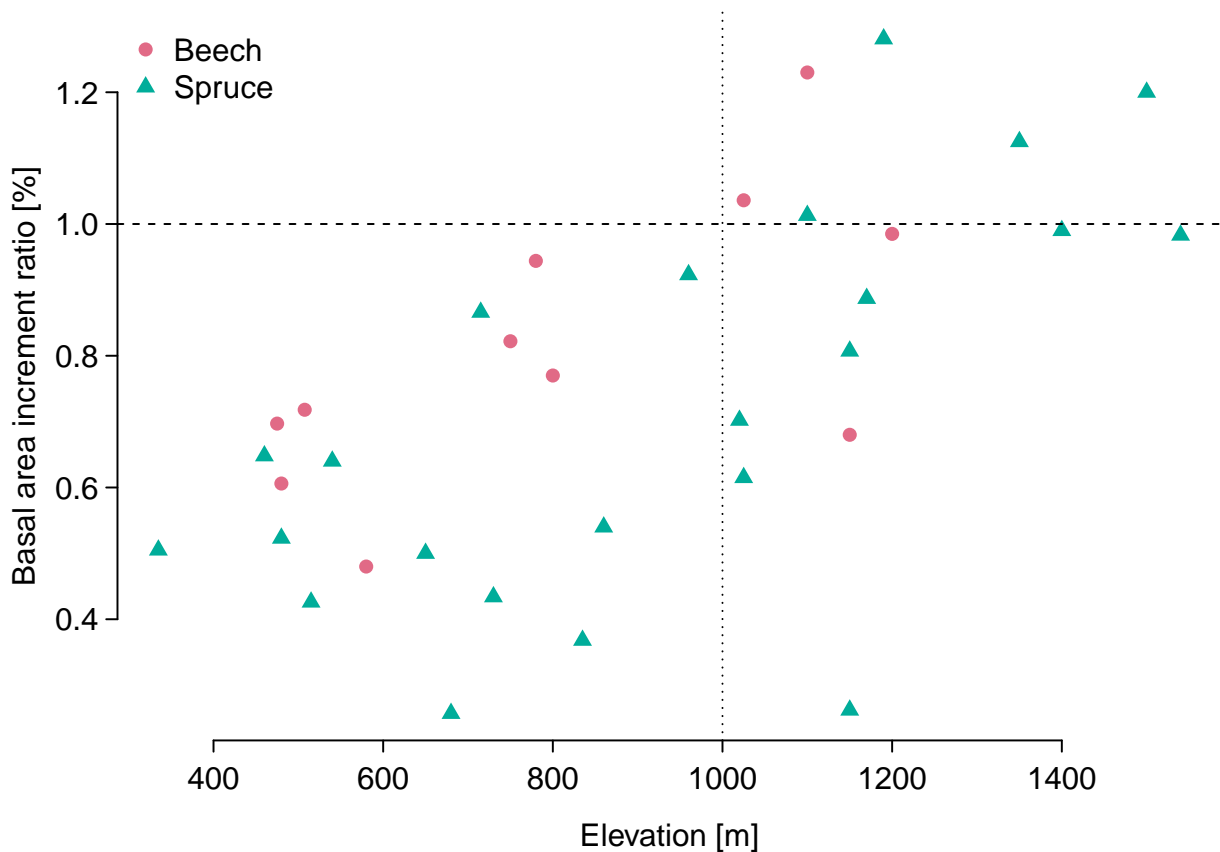
# 1 (Int)R(o)

## 1.1 What is R?

'A Language for Data Analysis and Graphics'

A first example: **Scatter plot, data-management and descriptive analysis**

```
## A scatter-plot:
paint <- colorspace::qualitative_hcl(n = 2)
par(mar = c(3, 3, .1, .1), mgp = c(2, .5, 0), tcl = -.3)
plot(drought$elev, drought$bair, las = 1, bty = "n",
     xlab = "Elevation [m]", ylab = "Basal area increment ratio [%]",
     pch = c(16, 17)[1 + (drought$species == "Spruce")],
     col = paint[1 + (drought$species == "Spruce")])
abline(h = 1, lty = 2)
abline(v = 1000, lty = 3)
legend("topleft", pch = c(16, 17), col = paint, legend = c("Beech", "Spruce"),
      bg = "white", bty = "n")
```



```
## ... some data-management:
range(drought$elev)

## [1] 335 1540

(tmp <- range(drought$elev %/% 250))

## [1] 1 6

br <- seq(tmp[1] * 250, (tmp[2] + 1) * 250, by = 250)
(drought$elev_cut <- cut(drought$elev, breaks = br))

## [1] (250,500]      (250,500]      (250,500]      (500,750]
## [5] (500,750]      (500,750]      (500,750]      (500,750]
## [9] (500,750]      (750,1e+03]    (750,1e+03]    (750,1e+03]
```

```
## [13] (1e+03,1.25e+03] (1e+03,1.25e+03] (1e+03,1.25e+03] (1e+03,1.25e+03]
## [17] (1e+03,1.25e+03] (1e+03,1.25e+03] (1e+03,1.25e+03] (1.25e+03,1.5e+03]
## [21] (1.25e+03,1.5e+03] (1.25e+03,1.5e+03] (1.5e+03,1.75e+03] (250,500]
## [25] (250,500] (500,750] (500,750] (500,750]
## [29] (750,1e+03] (750,1e+03] (1e+03,1.25e+03] (1e+03,1.25e+03]
## [33] (1e+03,1.25e+03] (1e+03,1.25e+03]
## 6 Levels: (250,500] (500,750] (750,1e+03] ... (1.5e+03,1.75e+03]

## ... and some descriptive statistics:
library("plyr")
ddply(.data = drought, .variables = c("species", "elev_cut"), summarize, .drop = F,
      n = length(bair),
      mean_bair = mean(bair))

##   species      elev_cut n mean_bair
## 1   Beech (250,500] 2 0.6515000
## 2   Beech (500,750] 3 0.6733333
## 3   Beech (750,1e+03] 2 0.8570000
## 4   Beech (1e+03,1.25e+03] 4 0.9827500
## 5   Beech (1.25e+03,1.5e+03] 0      NaN
## 6   Beech (1.5e+03,1.75e+03] 0      NaN
## 7  Spruce (250,500] 3 0.5586667
## 8  Spruce (500,750] 6 0.5205000
## 9  Spruce (750,1e+03] 3 0.6103333
## 10 Spruce (1e+03,1.25e+03] 7 0.7952857
## 11 Spruce (1.25e+03,1.5e+03] 3 1.1050000
## 12 Spruce (1.5e+03,1.75e+03] 1 0.9830000
```

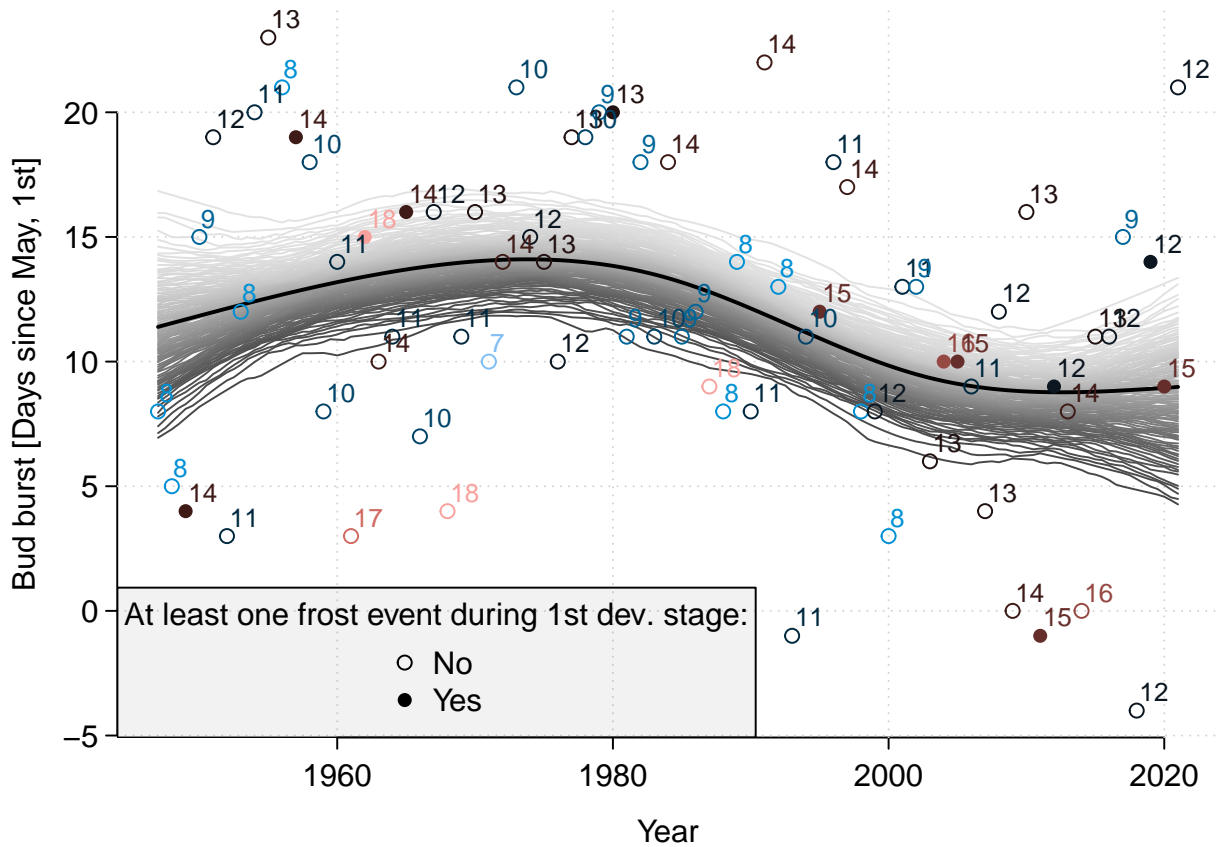
## 1.2 Why user?

Because of packages such as `mgcv`! ... and because we can organize our whole working-with-data-process reproducibly (markdown!) in one place!

(Note: the following figure is much too overloaded!)

```
par(mar = c(3, 3, .1, .1), mgp = c(2, .5, 0), tcl = -.3)
plot(frost$year, frost$bud_burst_days_since_may1st, type = "n",
     xlab = "Year", ylab = "Bud burst [Days since May, 1st]",
     las = 1, bty = "n")
grid()
legend("bottomleft", pch = c(1, 16), legend = c("No", "Yes"),
      title = "At least one frost event during 1st dev. stage:",
      bg = rgb(.5, .5, .5, alpha = .1))
## library("mgcv")
m <- mgcv::gam(bud_burst_days_since_may1st ~ te(year), data = frost)
nd <- data.frame(year = seq(min(frost$year), max(frost$year), by = .5))
br <- mgcv::gam.mh(m, thin = 5, ns = 2000, rw.scale = 2)$bs
coda::effectiveSize(coda::as.mcmc(br))
Mu <- predict(m, newdata = nd, type = "lpmatrix") %*% t(br)
Mu_q <- apply(X = Mu, MAR = 1, FUN = quantile,
             probs = seq(.01, .99, by = .01))
paint <- colorspace::sequential_hcl(n = nrow(Mu_q), pal = "Light Grays")
for (i in 1:nrow(Mu_q)) {
  lines(nd$year, Mu_q[i, ], col = paint[i])
}
lines(nd$year, predict(m, newdata = nd), lwd = 2)
tmp <- as.numeric(frost$end_1st_dev_stage - frost$bud_burst)
tmp <- tmp - min(tmp) + 1
paint <- colorspace::diverging_hcl(n = max(tmp), pal = "Berlin")
points(frost$year, frost$bud_burst_days_since_may1st, col = paint[tmp],
      pch = c(1, 16)[1 + (frost$n_frost > .5)])
```

```
text(frost$year, frost$bud_burst - frost$may1st,
     labels = frost$end_1st_dev_stage - frost$bud_burst,
     adj = c(-.1, -.5), cex = .8, col = paint[tmp])
```



## 1.3 Literature

### 1.3.1 Books...

- Everitt, Hothorn (2006): *A Handbook of Statistical Analyses using R*. Chapman and Hall.
- Ligges (2008): *Programmieren mit R*. Springer Verlag.
- Venables, Smith (2002): *An introduction to R*. Network Theory Verlag.
- Verzani (2005): *Using R for Introductory Statistics*. Chapman and Hall.
- Wickham (2016): *Advanced R*.

### 1.3.2 ... and the wide web:

- [education.rstudio.com](https://education.rstudio.com)
- [cran.r-project.org](https://cran.r-project.org) manual R-intro
- [cran.r-project.org](https://cran.r-project.org) manual R-lang

## 1.4 R and RStudio

R:

- <https://r-project.org>
- Freely available
- Supported by all major operating system: Windows, Linux/Unix, Mac OS, ...

RStudio and others editors for working with R:

- **RStudio** for Windows, Mac OS and Linux:
- RStudio website
- RStudio cheat sheet
- Previously, I presented a list of alternatives to RStudio, but in 2021, that doesn't seem suitable anymore!?

## 1.5 R is a language

- 'To understand computations in R, two slogans are helpful: Everything that exists is an object. Everything that happens is a function call.' (John M. Chambers)
- Interpreted language: *R* interprets and evaluates your function calls without a compilation step.
- Simple syntax with clear similarities to mathematical notation.

## 1.6 R is an environment for statistical computing

- rich toolbox for doing (graphical) statistics with an ever growing list of ever improving 'add-on' packages.
- R is freely available for anyone.
- R code is the product: it is transparent and allows you to reproduce any single step of your analysis.

## 1.7 A short history of R

- 1976: Development of programming language S at Bell Laboratories
- 1988: Software S-PLUS released (for purchase)
- 1992: Ross Ihaka and Robert Gentleman start project R
- 1995: R available for free under GPL
- 1998: Comprehensive R archive network (CRAN) is founded
- 2000: First 'complete' version R-1.0.0 released
- 2004: First conference on R (useR!) takes place
- 2021: Current version is *R-4.1.2* (November 2021)

## 2 Basic vector types

In R, there is no such thing as a single number, since in R, a single number is just a vector of length 1:

```
length(3)
```

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

R works on six basic vector types, of which four are used in our daily work as empirical researchers: `logical` (`TRUE` and `FALSE`), `integer` (numbers we know as `...`, `-1`, `0`, `1`, `2`, `...`; explicitly created in R with suffix `L`), `real` (extending integers to 'any' value such as `1/3`), and `string` (`'R'`, `'Beech'`, `...`).

```
class(TRUE)
```

```
## [1] "logical"
```

```
class(-1L)
```

```
## [1] "integer"
```

```
class(1/3)
```

```
## [1] "numeric"
```

```
class("R")
```

```
## [1] "character"
```

Again, the difference between integers and reals is not important for applied work, so just think of `integer` and `real` as class that represent numerical values in a computer. The following section introduces some manipulations we can do with them, `logical` and `string` will be treated later.

## 3 Basic mathematical commands

Mathematical operation	Command
Addition	<code>+</code>
Subtraction	<code>-</code>
Multiplication	<code>*</code>
Division	<code>\</code>
Exponentiation	<code>^</code>
Rest of integer division (Modulo)	<code>%%</code>
Integer division	<code>%\%</code>
Brackets	<code>()</code>

### 3.1 Exercises

Run the following lines.

**Note:** First and third line define objects `a` and `b` by using an indexing command on data-object `drought`. You don't need to fully understand what this does at this point of the course, just think that objects `a` and `b` each represent a single number with some applied meaning (Basal area increment ratio at 1st, and 2nd plot, respectively).

```
a <- drought$bair[1] ## Basal area increment ratio at 1st plot
a ## ... growth is about a half in 2003 in comparison to growth in 2002
b <- drought$bair[2] ## Basal area increment ratio at 2nd plot
b ## ... growth is about two thirds in 2003 in comparison to growth in 2002
a - b ## Whats the difference of bair?
a / b ## Whats the ratio of bair?
b %/% a ## How often is 'b' contained in 'a'?
b %% a ## If 'b' is contained once in 'a', what's remaining?
(a + b)/2 ## Arithmetic mean of 'a' and 'b'
```

Did we just calculate an arithmetic mean 'by hand'?

```
mean(c(a, b))
```

```
## [1] 0.5765
```



## 4 Symbols and values

Objective	Call
Decimal sign	.
List and separate objects, arguments, ...	,
Several <i>R</i> -calls in one line (not recommended)	;
'from-to' operator for integer sequences	:
Comments and help	#, ?
Number $\pi$	pi
A concept called infinity	Inf
Base 10 exponential notation (eg. $10^{-3} = 0.001$ )	1e-3
Integer value	L
Empty object	NULL
Missing value ( <i>not available</i> )	NA
Non-defined value ( <i>not a number</i> )	NaN
Comparison	>, >=, ==, !=, <=, <
Boolean	TRUE, T, FALSE, F
Negation ( <i>not</i> )	!
Conjunction ( <i>and</i> )	&
Disjunction ( <i>or</i> )	

Remember, everything in R is an object or a function, so we even can't use , without a function call such as:

```
c(a, b) ## first two bair values in a vector
## [1] 0.505 0.648
```

### 4.1 Exercises

Run the following lines and ask yourself *What is the applied question behind each line?*.

```
pi ## Okay, there is no applied meaning here, it's just a number, an important one, though :)
a / b == pi
a > b
a < b
a == a & b != 2/3
a > b | b < 2/3
a / 0
0 / 0 ## Let:  $x = 0 / 0$ . So:  $0 * x = 0$ , which is true for any number  $x$ .
```

## 5 Mathematical functions

Mathematical function	Call
Exponential function with basis $e$	<code>exp()</code>
Natural logarithm	<code>log()</code>
Square root	<code>sqrt()</code>
Absolute value	<code>abs()</code>
Trigonometric functions	<code>sin()</code> , <code>cos()</code> , <code>tan()</code>
Sum and product	<code>sum()</code> , <code>prod()</code>
Round (up and down)	<code>round()</code> ( <code>floor()</code> , <code>ceiling()</code> )
Maximum and minimum value	<code>max()</code> , <code>min()</code>
Factorial $n! = 1 \cdot 2 \cdot 3 \cdot \dots \cdot n$	<code>factorial()</code>
Binomial coefficient $\binom{n}{k}$	<code>choose()</code>

... for further functions, see `?Special` and `?groupGeneric`.

**Also note:** There are only countable many numbers that a computer is able to represent. Therefore, computers can also only represent some real numbers, and as a consequence, 'rounding' is more complicated than we might think! Here are some explanations why R results in 0 2 2 4 4 6 6 instead of 0 1 2 3 4 5 6 when it does `round(seq(0.5, 6.5))`. Many thanks to Jan Schick for pointing me towards this 'rounding' standard in R, as well as providing me this nice example. Session 05 will also briefly touch upon R and computers and the 'density' of real numbers.

### 5.1 Exercises

Run the following lines.

```
a <- drought$bair[1]; a; b <- drought$bair[2]; b ## Basal are increment ratio values of first two st
exp(x = a)
sqrt(x = a)
a - b
abs(x = a - b)

(Computers construct real values)[https://en.wikipedia.org/wiki/Floating-point\_arithmetic]:

sin(x = pi)
## [1] 1.224647e-16

round(sin(pi), digits = 5)
## [1] 0

cos(x = pi)
## [1] -1

sum(a, b)
max(a, b)
```

## 6 Functions basics

(We will have a more detailed focus on functions in the third session.)

### Basic properties of functions in R:

- Function call of function `f` using brackets: `f()`
- Documentation (*'help-page'*) using preceded question mark (`?f`), or calling `help(f)`
- Search for documentation of `f` by: `help.search('f')`
- Syntax:

```
f(arg1 = value1, arg2 = value2, ...) ## '...' is for optional further arguments.
```

- Arguments often have default objects, eg. for `pch` in `plot()`:

```
plot(x = a, y = b)
```

```
plot(x = a, y = b, pch = 1) ## same!
```

- Giving objects to arguments is not optional in any case:

```
sin(pi/2)
```

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

```
sin(x = pi/2) ## Same
```

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

```
plot(pi, pi, 1) ## Error!
```

```
## Error in plot.xy(xy, type, ...): ungültiger Plottyp
```

## 7 Documentation

### Structure:

- **Description:** In brief, what is this function about?
- **Usage:** How to call the function? What are mandatory arguments?
- **Arguments:** Explaining each argument
- **Details:** Some text about implementation, scope, ...
- **Value:** Explaining the resulting object
- **Authors** and **References** and **See also** and ...
- **Examples:** Always at the bottom, always scroll down there, you will never be disappointed!

### 7.1 Exercises

Go to the documentation for `lm`.

- What is this function about?
- Copy-paste and run the example.

## 8 Objects

### Basic Conventions:

- Objects store values, results or algorithms, ie. functions.
- Assignment of contents by `<-` or `=` (or very seldomly `->`).
- Type of contents is described by object classes.

```
(a <- drought$bair[1]); (a = drought$bair[1])
## [1] 0.505
## [1] 0.505
log(b <- drought$bair[2]); b
## [1] -0.4338646
## [1] 0.648
(a <- b)
## [1] 0.648
```

### 8.1 Objekt names

There are few hard technical restrictions on how to name objects in R, and a few soft rules that make life much simpler:

- Object names are required to begin with a lower or upper case letter, no numbers or any other signs are allowed.
- As a second or any trailing character, numbers and some signs (restrict yourself to underscore `_` and `.`) are allowed
- Don't use `?`, `$`, `%`, `^`, `&`, `*`, `(`, `)`, `-`, `#`, `?`, `,`, `<`, `>`, `/`, `|`, `\`, `[`, `]`, `{`, and `@`
- **As short as possible, as long as needed!**
- This trade-off is simple, but (hopefully) still very useful: long object names mean more typing (RStudio weakens this point by auto-complete), but leave less room for questions on content (*What was a again?*).
- So try to give 'telling names', ie. contents (and units!) should be clearly visible from the object's name: `first_bair_measurement` is better than `a`, `elev_m` is better than `elev`.
- Ask yourself: Will I be able to immediately remember the contents from the name after two weeks without working on this project?

We get an error message:

```
3values <- c(1, 2, 4)
## Error: <text>:1:2: unerwartetes Symbol
## 1: 3values
##      ^
three_values <- c(1, 2, 4)
```

### 8.2 Save and load

```
save(frost, file = "frost_data.RData")
load(file = "frost_data.RData")
```

Where will my files be stored? See section *Preparatory Work in R* in Session 04.

### 8.3 Litter service

- Names of objects in current session: `ls()`
- Litter service using `rm()`
- `dput()` comes as a helper

```

ls()

## [1] "a"          "b"          "br"         "df"         "drought"
## [6] "frost"      "i"          "m"          "Mu"         "Mu_q"
## [11] "nd"         "paint"      "three_values" "tmp"

dput(ls())

## c("a", "b", "br", "df", "drought", "frost", "i", "m", "Mu", "Mu_q",
## "nd", "paint", "three_values", "tmp")

dput(ls()[!(ls() %in% c("drought", "frost", "df"))])

## c("a", "b", "br", "i", "m", "Mu", "Mu_q", "nd", "paint", "three_values",
## "tmp")

rm("a", "b", "br", "i", "m", "Mu", "Mu_q", "nd", "paint", "three_values", "tmp")
ls()

## [1] "df"          "drought" "frost"

```

## 9 Dataobject classes

### 9.1 Vector

A vector is a one-dimensional combination of length 1 vectors of the same basic vector type.

#### 9.1.1 Basics

Objective	Call
Combination of elements	<code>c(A, B)</code>
Indexing	<code>c(A, B)[1]</code>
Length of vector	<code>length(x)</code>
Integer sequence	<code>A:B</code>
Flexible sequence	<code>seq(A, B, length = N), seq(A, B, by = K)</code>
Repeat	<code>rep(A, times = N), rep(c(A, B), each = K)</code>
Sort elements	<code>sort(c(A, B), decreasing = FALSE)</code>
Order of elements	<code>order(c(A, B))</code>

#### 9.1.2 Exercises

Copy-paste and run each line: describe what it does and what it results in.

```
a <- drought$elev[1]; b <- drought$elev[2]
(x <- c(a, b))
c(x, a)
c(x, x)
x[2] <- drought$elev[3]; x
length(x)
a:b
seq(a, b, by = .5)
seq(a, b, by = 5)
seq(a, b, length = 10) ## Sequenz
rep(x, times = 3)
rep(x, each = 3)
rep(x, length = 7)
sort(x, decreasing = TRUE)
order(c(x, 100))
a <- as.character(drought$species[1]); b <- as.character(drought$species[2])
(x <- c(a, b))
c(x, "Beech")
c(x, 2)
```

### 9.2 Calculations

- Basic calculations operate independently on all elements
- Function calls work (usually) with vectorized arguments
- Summary of the content: `summary()`
- Frequency table: `table()` (see Session 04 for much more detail)

#### 9.2.1 Exercises

Copy-paste and run each line: describe what it does and what it results in.

```
x <- drought$bair
x^2
sin(x)
```

```
length(x)
summary(x)
boxplot(x)
stripchart(x, add = T, pch = 16, method = "jitter", vertical = T)

species <- drought$species
xtabs(~ species)
xtabs(~ species + (drought$elev > 1000))
```

## 9.3 Matrix

A vector is a two-dimensional combination of single-element objects of the same class.

### 9.3.1 Basics

$P \times P$  matrix with content content:

```
A <- matrix(nrow = P, ncol = Q, data = content)
```

Fill matrix column- (default) or linewise using argument `byrow = TRUE`:

- Indexing of one element: `A[1, 1]`
- Indexing of first row (result is vector): `A[1, ]`
- Indexing of several rows (result is matrix): `A[1:3, ]`
- Indexing of first column (result is vector): `A[, 1]`
- Indexing of several columns (result is matrix): `A[, 1:3]`
- Indexing of several rows and columns (result is matrix): `A[1:3, 1:3]`

### 9.3.2 Exercises

```
a <- drought$elev
b <- drought$bair
length(a) == length(b)
A <- matrix(nrow = length(a), ncol = 2, data = c(a, b))
all(A[, 1] == a)
A[1:3, ]
A[1:3, 2]
A[c(1:3, 29), ]
B <- matrix(nrow = 3, ncol = 3, data = 1:9); B
diag(B)
B %*% B
B %*% c(1, 1, 1)
rowSums(B)
c(1, 1, 1) %*% B
colSums(B)
```

## 9.4 List

A list is a general 'container' object.

### 9.4.1 Basics

- Lists may contain elements storing objects of varying classes, lengths, .... (character, numeric, integer, factor, ...)
- Construct a list using `list(...)`
- Indexing: `x[[1]]` or `x[['name']]` or `x$name`
- `str` gives the structure



- For lists of 'consistent' classes (or generic functions):

```
lapply(X = mylist, FUN = myfun)
```

### 9.4.2 Exercises

```
beech <- list(species = "Fagus",
             n = sum(drought$species == "Beech"),
             data = subset(drought, species == "Beech"))

beech
beech[[1]]
beech[['species']]
beech$species
str(beech)
lapply(beech, FUN = dim)
lapply(beech, FUN = summary)
```

## 9.5 Synthesis and indexing

- We may provide names for elements of vectors, matrices and lists:
- `dimnames(A)`, `rownames(A)`, `colnames(A)` for matrices
- Select a named element by using the `$` sign
- Select elements by `[[ ]]` (for lists), `[ ]` (for vectors), and `[, ]` (for matrices).

### 9.5.1 Exercises

```
c(one = 1, two = 2, four = 4)
x <- c(1, 2, 4)
x
names(x) <- c("one", "two", "four")
x
names(beech)
A <- matrix(nrow = 10, ncol = 2, data = c(drought$elev[1:10], drought$bair[1:10]))
colnames(A)
colnames(A) <- c("elev", "bair")
colnames(A)
rownames(A)
names(A)
dimnames(A)
```

## 9.6 Dataframe

Based on their object properties, dataframes can be classified between matrices and lists, whereby the columns (the so-called 'variables') of the dataframe correspond to the elements of a list:

- Dataframes are more rigid than lists because all columns must have the same length,
- Dataframes are more flexible than matrices, since all columns can contain different contents (numbers, strings, ...).
- Dataframes are generated with `data.frame ()`
- Indexing:
  - Rows and columns can be indexed in the same way as the elements of a matrix,
  - Columns can be indexed in the same way as the elements of a list (we have already used this by `drought$elev`).

### 9.6.1 Exercises

```
weather <- data.frame(day = c("Monday", "Tuesday", "Wednesday"),
                     daily_mean_temperature_C = c(12, 14, 11),
                     precipitation_sum_mm = c(5, 9, 25),
                     site = "Goettingen")

weather
weather[1:2, ]
weather$day[1:2]
weather[["daily_mean_temperature_C"]][3]
weather[1:2, c("daily_mean_temperature_C", "precipitation_sum_mm")]
weather[1:2, c("day", "precipitation_sum_mm")]
```

## 9.7 Functions on dataframes

- `summary`: Summary of each of the variables in the dataframe
- `str`: overview of the structure of the dataframe
- `dim`: Dimension of the dataframe (number of rows and columns)
- The first `N` lines of a dataframe `df` are extracted with `head(df, n = N)`, and
- the last `N` lines of a dataframe `df` are extracted with `tail (d, n = N)`.

### 9.7.1 Exercises

```
summary(weather)
str(weather)
head(weather, n = 2)
dim(weather)
```

## 10 Functions for character strings

If we want to change character strings (such as variable names of a dataframe), the following functions can be helpful:

### nchar

Returns the number of characters of a string:

```
nchar(names(weather))
## [1]  3 24 20  4
```

### tolower und toupper

Replaces uppercase with lowercase letters (and vice versa).

```
toupper(c("Beech", "BEech", "beech"))
## [1] "BEECH" "BEECH" "BEECH"

tolower(c("Beech", "BEech", "beech"))
## [1] "beech" "beech" "beech"
```

### gsub

Replace a pattern:

```
names(weather)

## [1] "day"                "daily_mean_temperature_C"
## [3] "precipitation_sum_mm" "site"

names(weather) <- gsub(names(weather), pattern = "_mm", replacement = "__mm", fixed = T)
names(weather) <- gsub(names(weather), pattern = "_C", replacement = "__C", fixed = T)
names(weather)

## [1] "day"                "daily_mean_temperature__C"
## [3] "precipitation_sum__mm" "site"
```

### substring

Substrings from first to last.

```
substring(names(weather), first = 1, last = 5)
## [1] "day"    "daily" "preci" "site"
```

### strsplit

Splits strings according to a certain pattern (strsplit always returns a list).

```
names(weather) <- gsub(names(weather), pattern = "__", replacement = "_", fixed = T)
(tmp <- strsplit(names(weather), split = "_", fixed = T))

## [[1]]
## [1] "day"
##
## [[2]]
## [1] "daily"    "mean"      "temperature" "C"
```

```
##
## [[3]]
## [1] "precipitation" "sum"          "mm"
##
## [[4]]
## [1] "site"
```

## **paste**

Merges strings (arguments sep or collapse).

```
sapply(tmp, FUN = function(x){paste(x, collapse = "_")})
## [1] "day"          "daily_mean_temperature_C"
## [3] "precipitation_sum_mm"  "site"
```

## 11 Factors

For the analysis of qualitative characteristics, it makes sense to represent variables with character strings as **factors**.

A factor comes with three ingredients:

- data vector `x`
- levels
- labels

We can generate a factor without specification of levels and labels: In this case, factor levels (`levels`) are generated (in alphabetical order), numbered internally (see this numeric expression using `as.numeric`), and represented externally by the original values of the character string.

```
(tmp <- factor(x = c("Beech", "Spruce", "Beech")))  
## [1] Beech Spruce Beech  
## Levels: Beech Spruce  
attributes(tmp)  
## $levels  
## [1] "Beech" "Spruce"  
##  
## $class  
## [1] "factor"  
levels(tmp)  
## [1] "Beech" "Spruce"  
as.numeric(tmp)  
## [1] 1 2 1  
as.character(tmp)  
## [1] "Beech" "Spruce" "Beech"
```

We can provide levels, to which the numerical representation will refer to:

```
(tmp <- factor(x = c("Beech", "Spruce", "Beech"),  
              levels = c("Spruce", "Beech")))  
## [1] Beech Spruce Beech  
## Levels: Spruce Beech  
attributes(tmp)  
## $levels  
## [1] "Spruce" "Beech"  
##  
## $class  
## [1] "factor"  
levels(tmp)  
## [1] "Spruce" "Beech"  
as.numeric(tmp)  
## [1] 2 1 2  
as.character(tmp)  
## [1] "Beech" "Spruce" "Beech"
```

Using labels, the values represented externally are the result of the mapping from levels to labels

```

(tmp <- factor(x = c("Beech", "Spruce", "Beech"),
              levels = c("Beech", "Spruce"),
              labels = c("Fagus sylvatica", "Picea abies")))

## [1] Fagus sylvatica Picea abies      Fagus sylvatica
## Levels: Fagus sylvatica Picea abies

attributes(tmp)

## $levels
## [1] "Fagus sylvatica" "Picea abies"
##
## $class
## [1] "factor"

levels(tmp)

## [1] "Fagus sylvatica" "Picea abies"

as.numeric(tmp)

## [1] 1 2 1

as.character(tmp)

## [1] "Fagus sylvatica" "Picea abies"      "Fagus sylvatica"

```

## 11.1 Exercises

```

tmp <- factor(x = c("Beech", "Spruce", "Beech", "Oak"),
              levels = c("Beech", "Spruce"),
              labels = c("Fagus sylvatica", "Picea abies"))

attributes(tmp)
levels(tmp)
as.numeric(tmp)
as.character(tmp)

tmp <- factor(x = c("Beech", "Spruce", "Beech", "Oak"),
              levels = c("Beech", "Oak", "Spruce"),
              labels = c("Deciduous", "Deciduous", "Conifer"))

attributes(tmp)
levels(tmp)
as.numeric(tmp)
as.character(tmp)

```