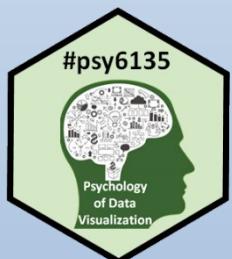
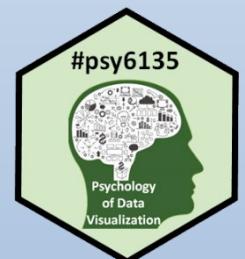


Graphical Perception



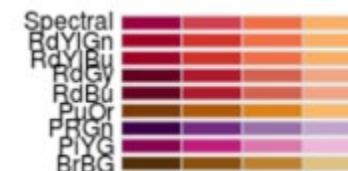
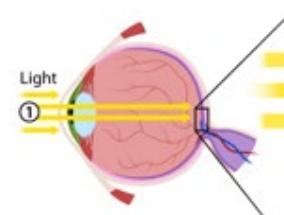
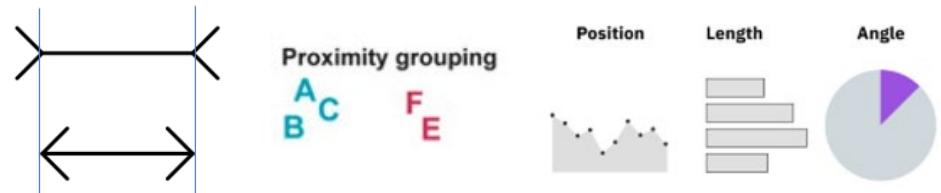
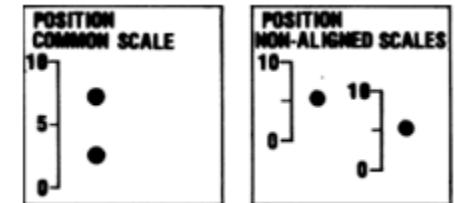
Michael Friendly
Psych 6135

<https://friendly.github.io/6135>



Topics

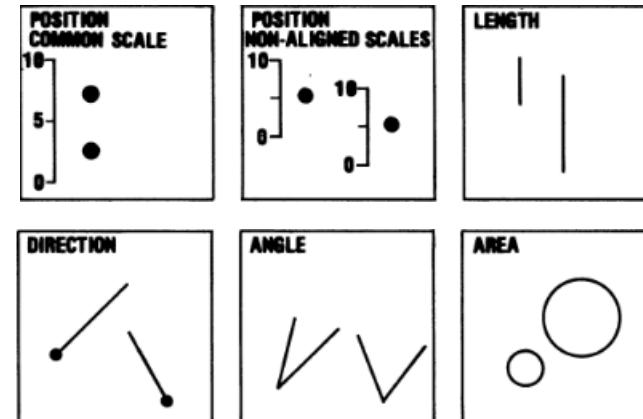
- Perception & Cognition
 - Encoding, decoding
 - Top-down vs. bottom-up processing
- Perceptual aspects
 - Illusions
 - Gestalt factors
 - Accuracy of decoding
- Cognitive aspects
 - Memory
 - Color



Graphical Perception

- In constructing a graph, quantitative and categorical information is encoded by visual attributes:

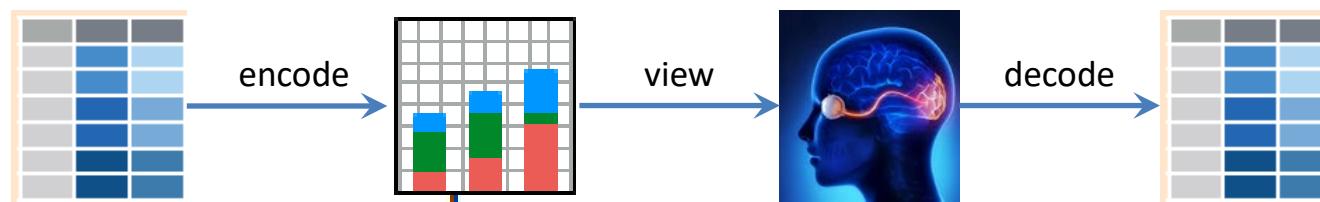
- Length
- Position along axis
- Angle
- Area
- Color, shape, line style



- What determines the ability of graph viewers to:
 - Make comparisons (which is larger?)
 - Estimate a magnitude?
 - See patterns, trends, unusual features?

Encoding & decoding

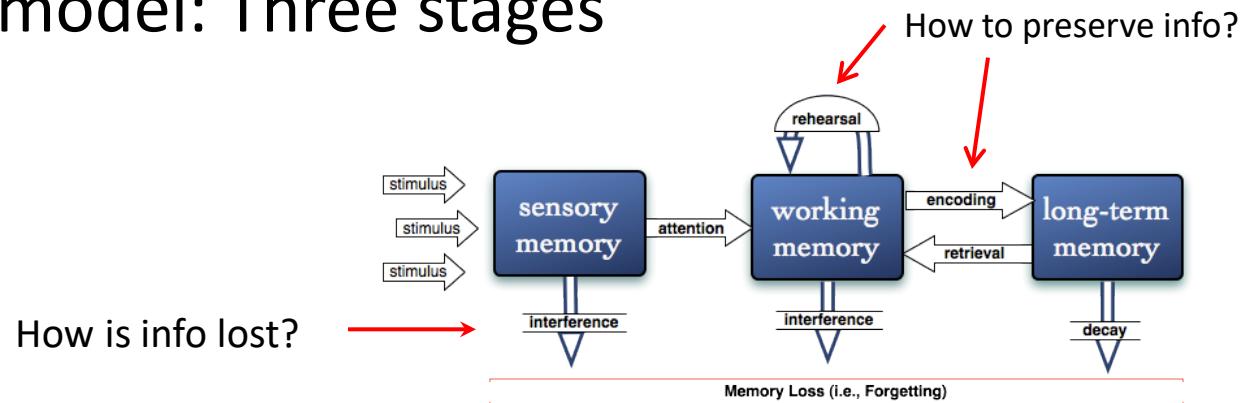
- When we construct a graph, we **encode** a numerical or categorical variable as a graphical attribute
- When we view a graph, the goal is to **decode** the graphical attributes and extract information about the data that was encoded



- → Encoding should rely on features that can easily be decoded
- → Designing effective graphs depends on understanding these ideas!

Visual & cognitive systems

- A simplified model: Three stages

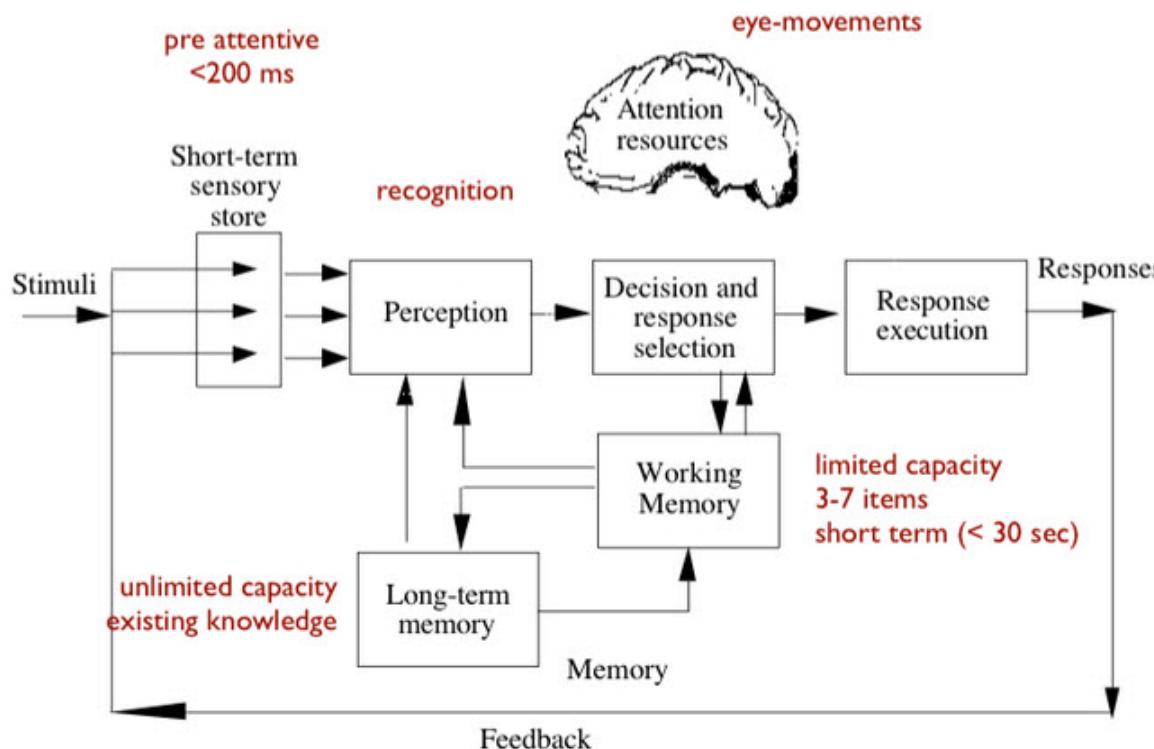


- Sensory (iconic) memory
 - pre-attentive, automatic, feature detection
 - massively parallel, short duration, easily fooled (“thinking fast”)
- Working memory
 - requires attention, limited capacity (~ 4-6 “chunks”)
 - memory aids: rehearsal; imagery
- Long-term memory
 - real-world knowledge, ~ unlimited capacity, inference (“thinking slow”)

Perception vs. cognition

Another coarse distinction:

- **Perception:** Processing of the signals coming in: what you “see”
- **Cognition:** How you **understand** and **interpret** what you see



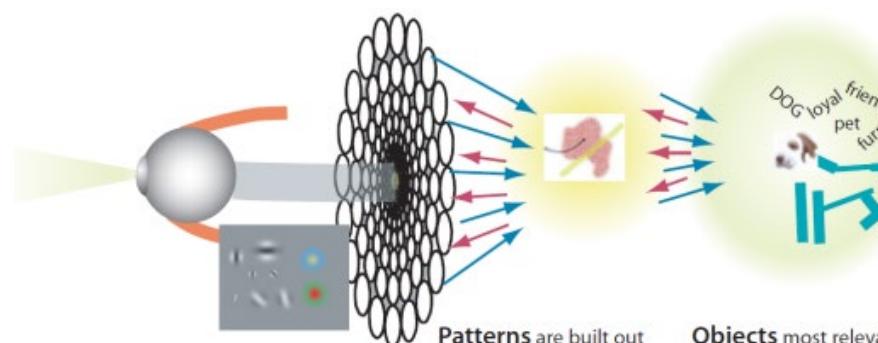
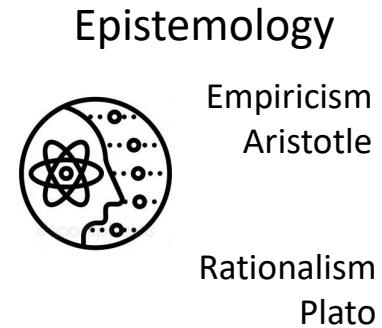
A nice scientific or textbook diagram

But where is cognition?



Perception: Bottom-up & Top-down

- Bottom-up processing
 - Low level: features → pattern → object
 - Detect edges, contours, color, motion
- Top-down processing
 - Driven by goals, expectations
 - Uses prior knowledge, experience, filters what we “see”



Features are processed in parallel from every part of the visual field. Millions of features are processed simultaneously.

Patterns are built out of features depending on attentional demands. Attentional tuning reinforces those most relevant.

Objects most relevant to the task at hand are held in Visual Working Memory. Only between one and three are held at any instant. Objects have both non-visual and visual attributes.

Bottom-up information drives pattern building

Top-down attentional processes reinforce relevant information

Perception: Bottom-up

How many 5s in this display?

1561321203658413076510374627
4173127527327592732990709742
1703707774179527931749270973
4019743217909370945179279417

How many 5s in this display?

1561321203658413076510374627
4173127527|327592732990709742
1703707774179527931749270973
4019743217909370945179279417

Numerals differ only in **shape**, and are high-level symbols

You have to literally scan them **all** & count the 5s.

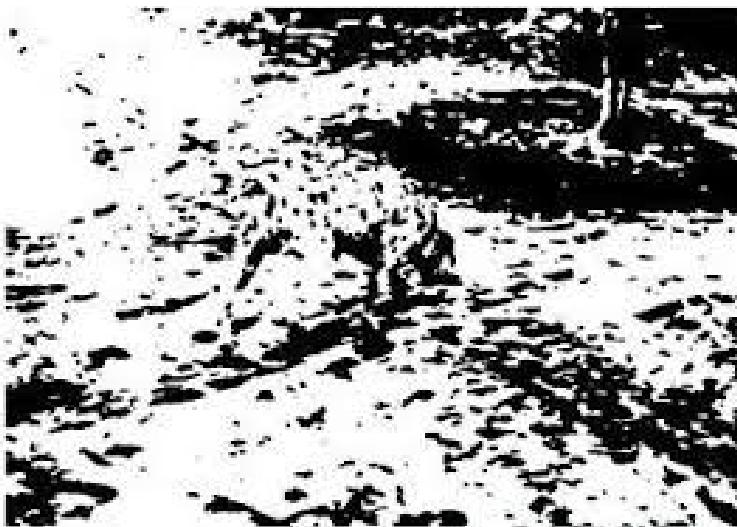
The distinction of **color** is immediate & **pre-attentive**

You only have to scan for 5s & count them.

This is why **color** is an important visual attribute for a **categorical** variable in graphs

Perception: Top-down

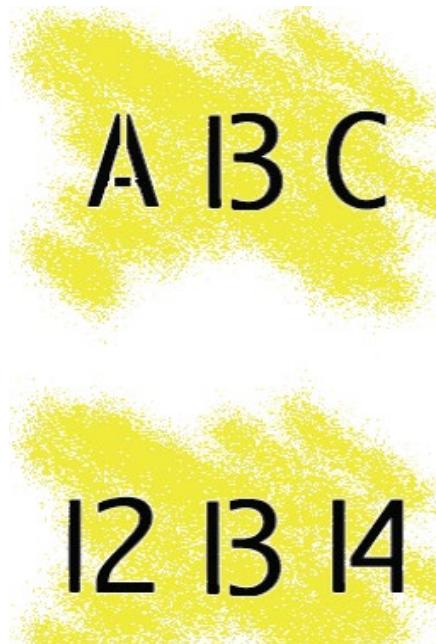
What is in this scene?



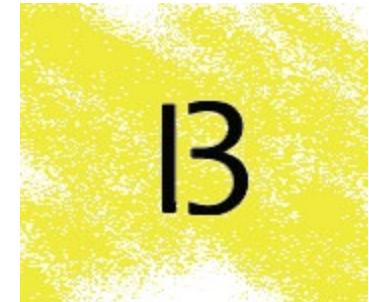
What is the middle letter in each word?

TAE CAT

What is the middle character?



What here?



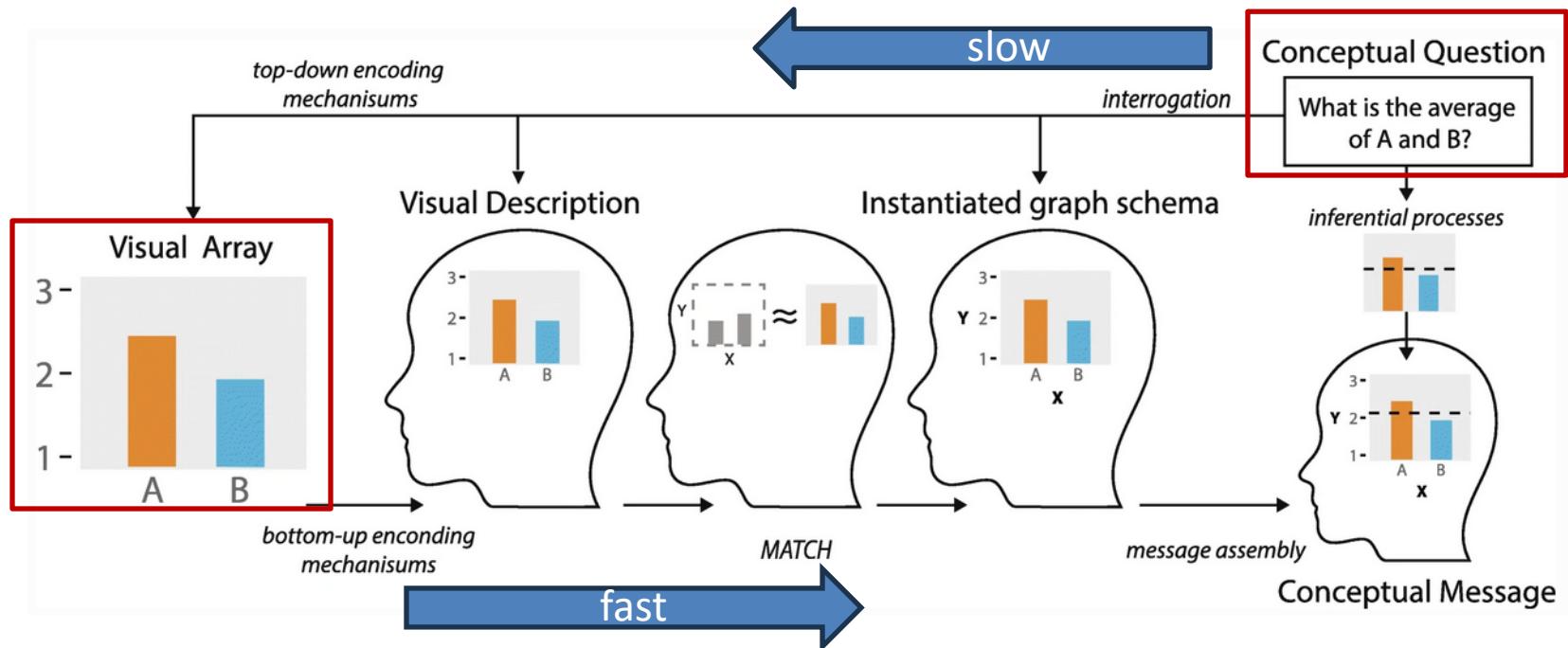
An ambiguous figure!

All of these are demonstrations of the role of **expectations** (top-down) in determining what we “see”
Gregory ('70): perception as **constructive**, depends on prior knowledge

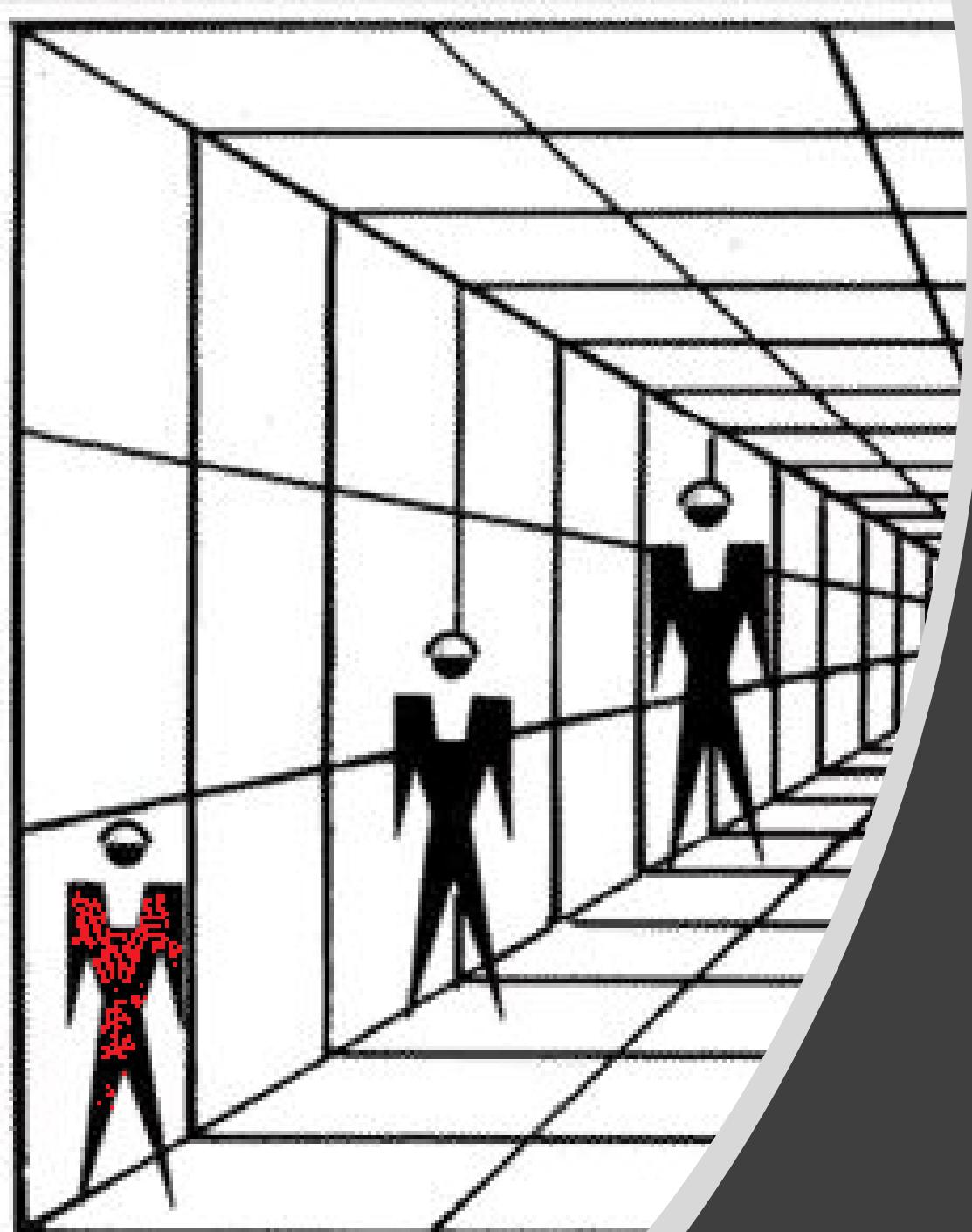
Cognition: Graph reading

Pinker (1990): cognitive model that integrates top-down and bottom-up encoding mechanisms in understanding of data graphs

- What do we do, given a graph and a question?



Pinker, S. (1990). A theory of graph comprehension. In *Artificial intelligence and the future of testing*.
Image from: Padilla et al. (2018) <https://bit.ly/4atEwEo>



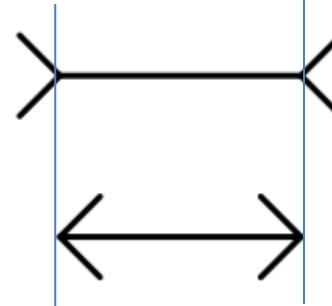
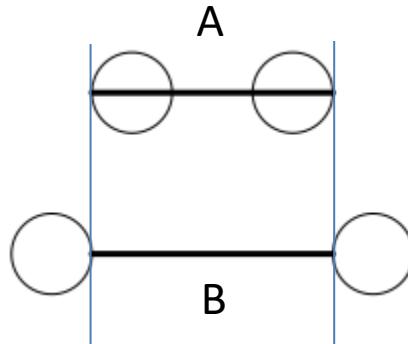
Illusions: The Eye-Brain Barrier

Perceptual illusions
give some guidance on
what **not to do** in data
graphics

Illusions: Length

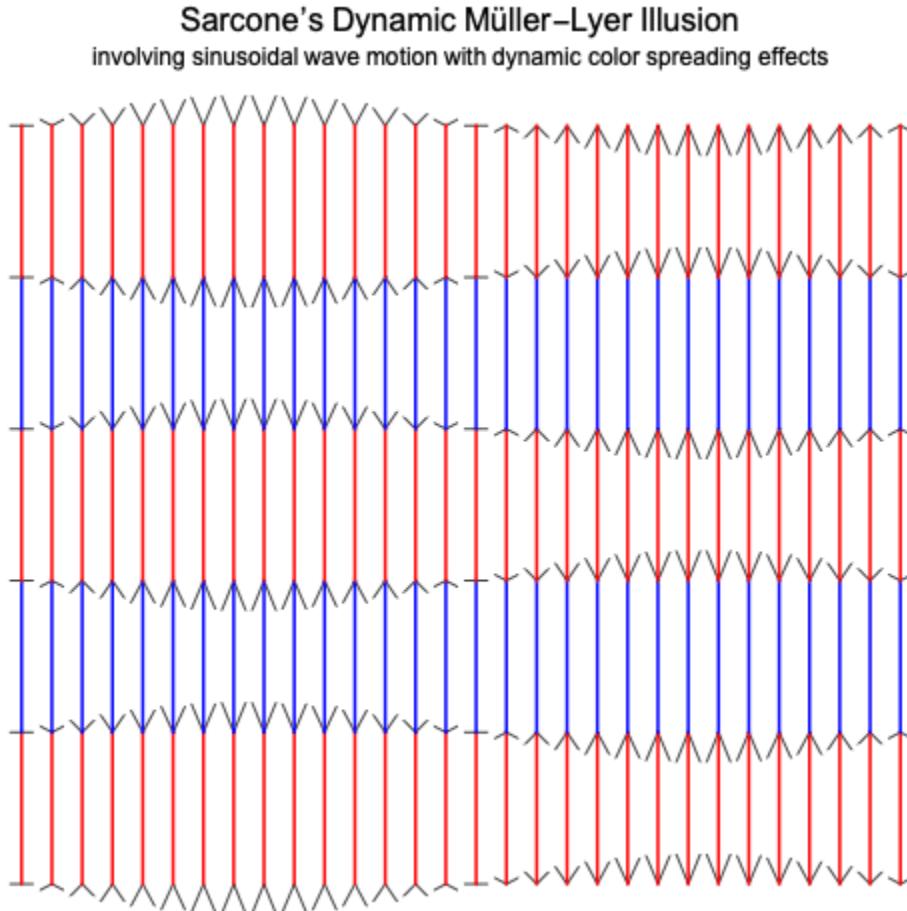
Surrounding **context** matters in judging the **length** of objects.

Which **line** is longer? Or are they the same?



Surrounding context pulls perception of length in its direction
This is the famous **Müller-Lyre** illusion

Are these lines changing length?



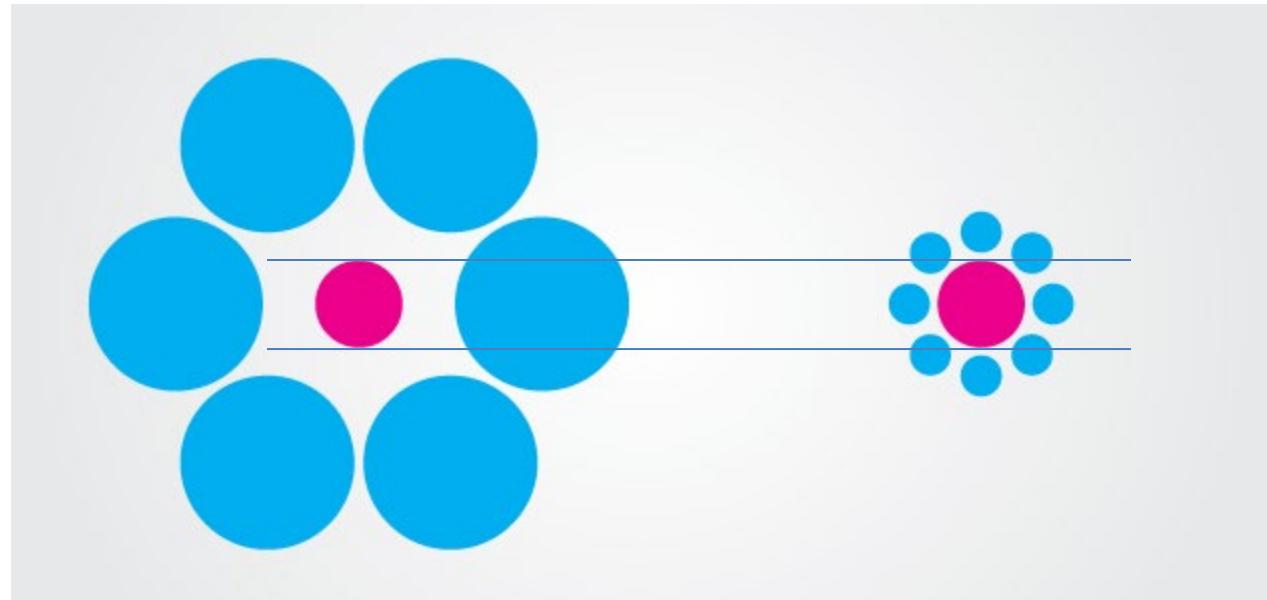
1. Focus your eyes on the center, and describe the pattern
2. Now, focus on **red bar** at top, right. Is it changing?
3. Now, focus on the **gray arrows** surrounding these bars. What do you see?

Arrows are often useful in data graphs.
Always use **same directions & angles** for arrow heads ←→

Illusions: Area

Surrounding **context** matters in judging the **area** of objects.

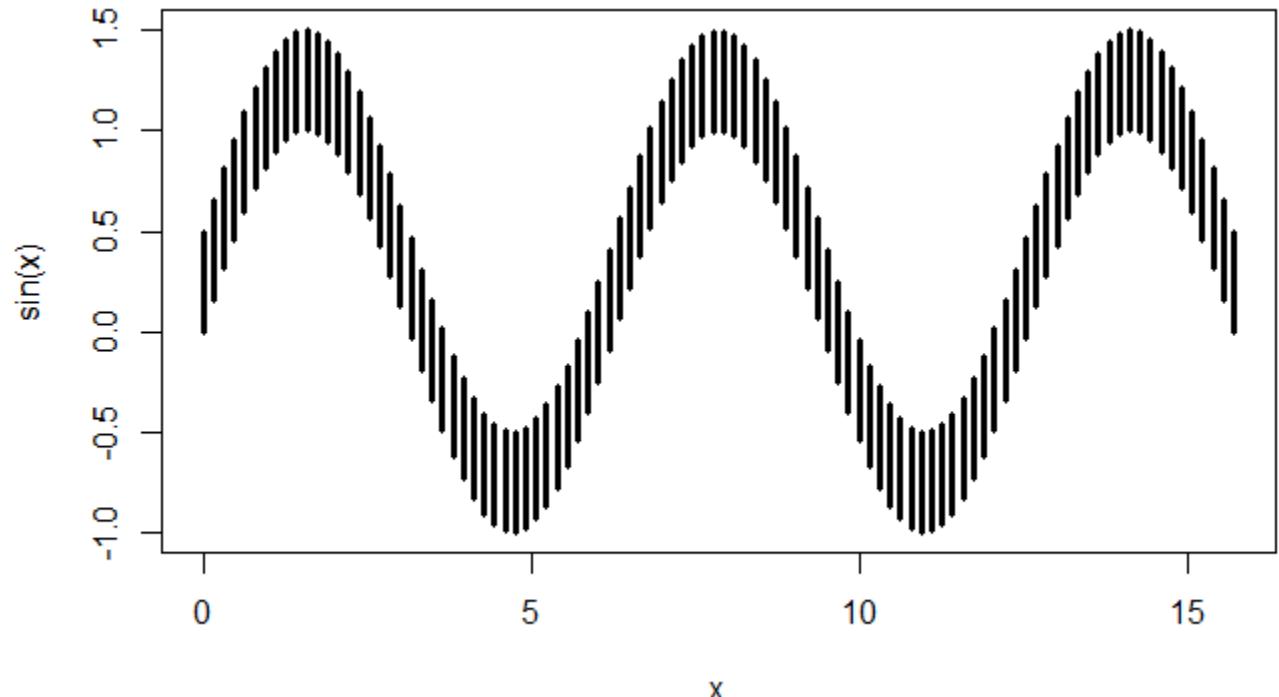
Which **red** circle is larger? Or are they the same?



Surrounding **context** pulls perception of area against the background
This is often called the **Ebbinghaus** illusion or the **Tichener** illusion

Illusions: Length

Which of the bars are longer? Or, are they all the same length?

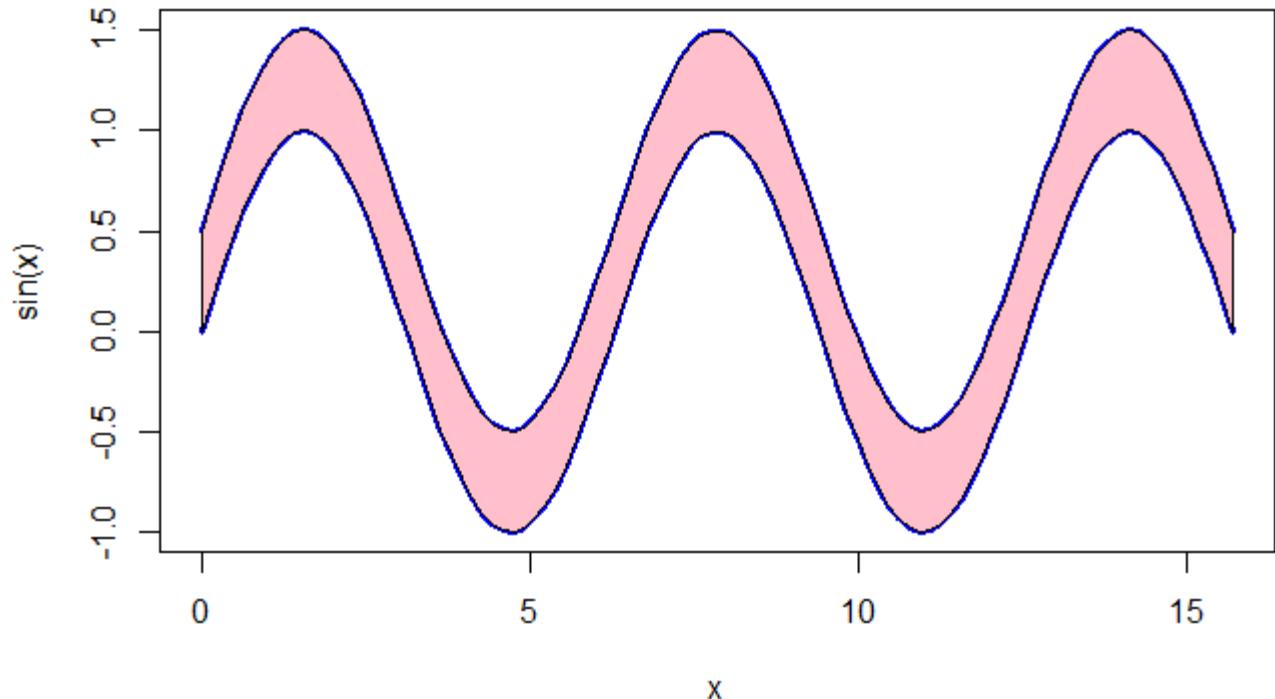


R code:

```
x <- seq(0, 5 * pi, length.out = 100)
w <- 0.5
plot(x, sin(x), ylim = c(-1, 1 + w), type = "n")
segments(x0 = x, y0 = sin(x), y1 = sin(x) + w, lwd = 3)
```

Illusions: Difference

Where are **differences** between curves are larger? Or, are they all the same?



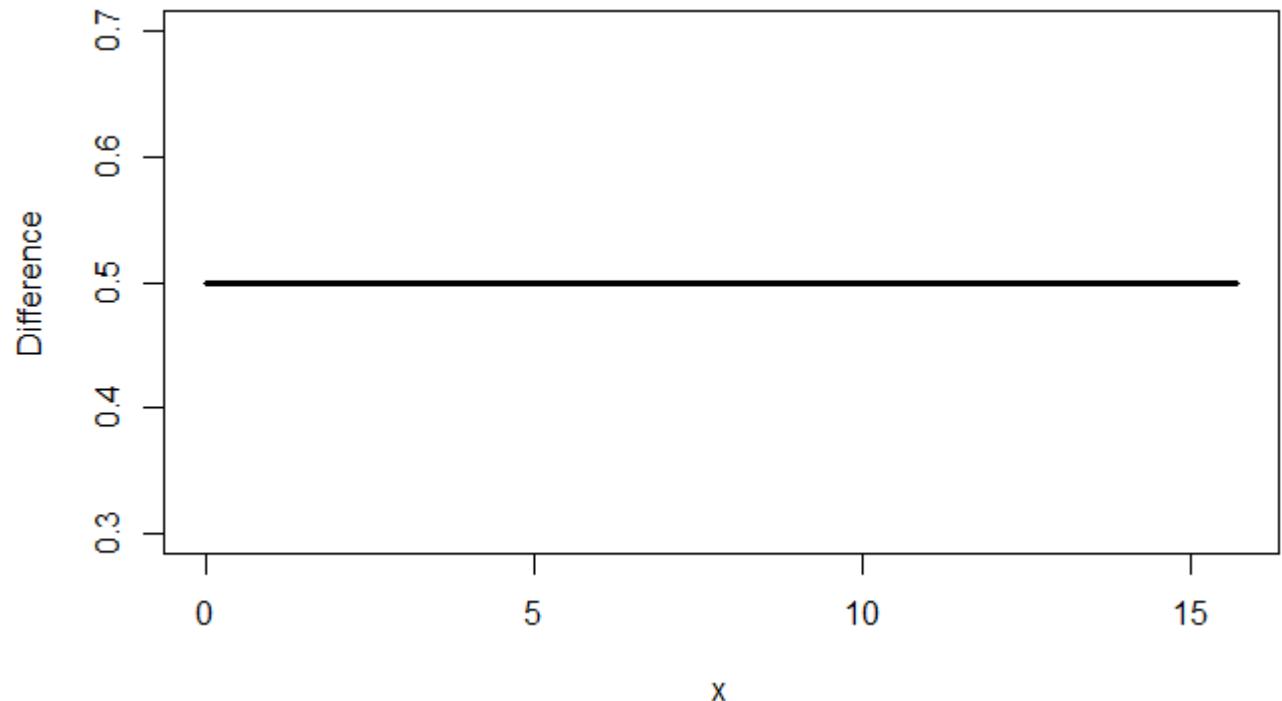
This is sometimes called the “sine illusion”

Illusions: Difference

Plotting the **difference** directly gives the answer.



OMG!

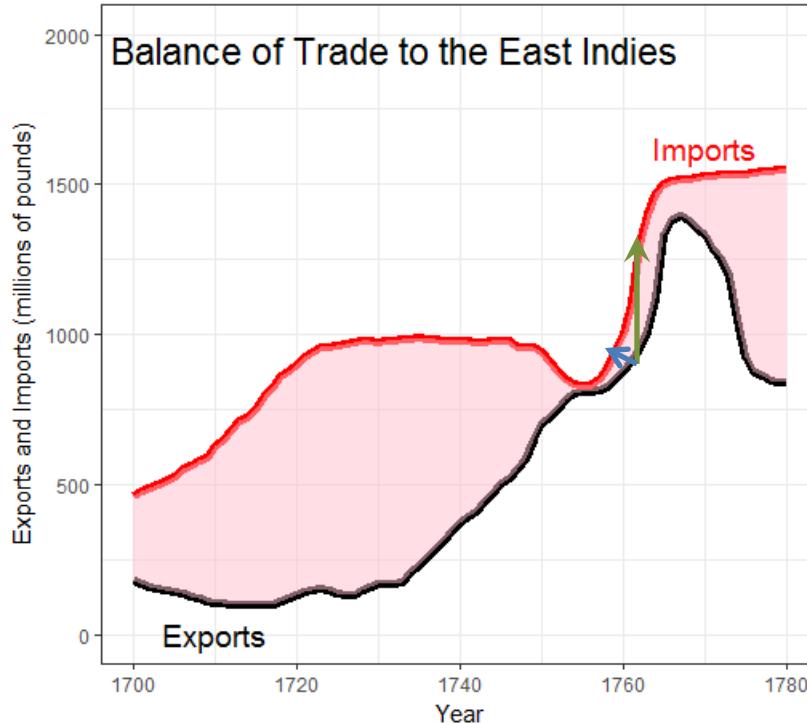


Why does this matter?

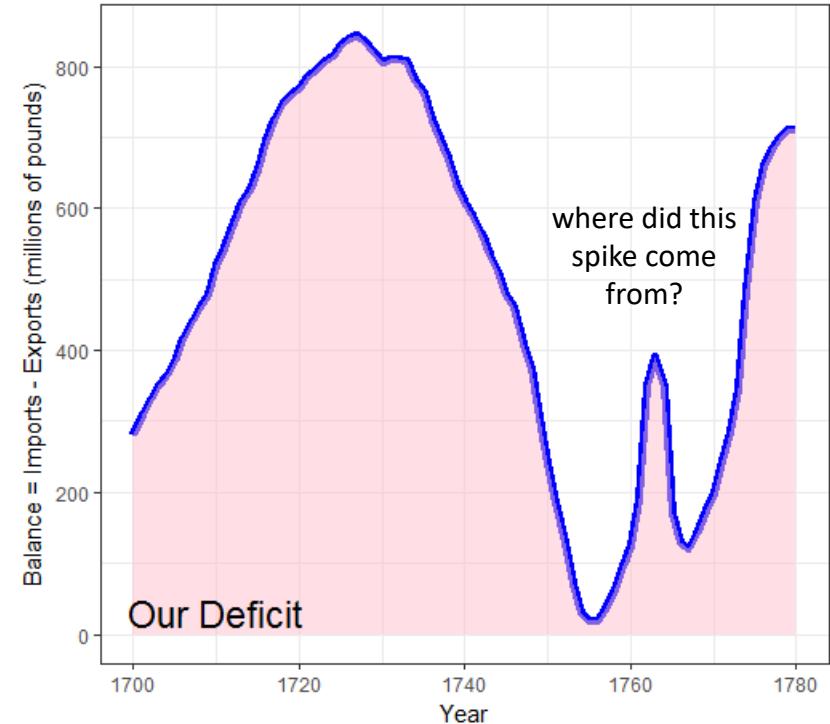
Distances between curves

Playfair didn't know that judgments of distance between curves are **biased**
We tend to see the **perpendicular** distance rather than the **vertical** distance

Original graph

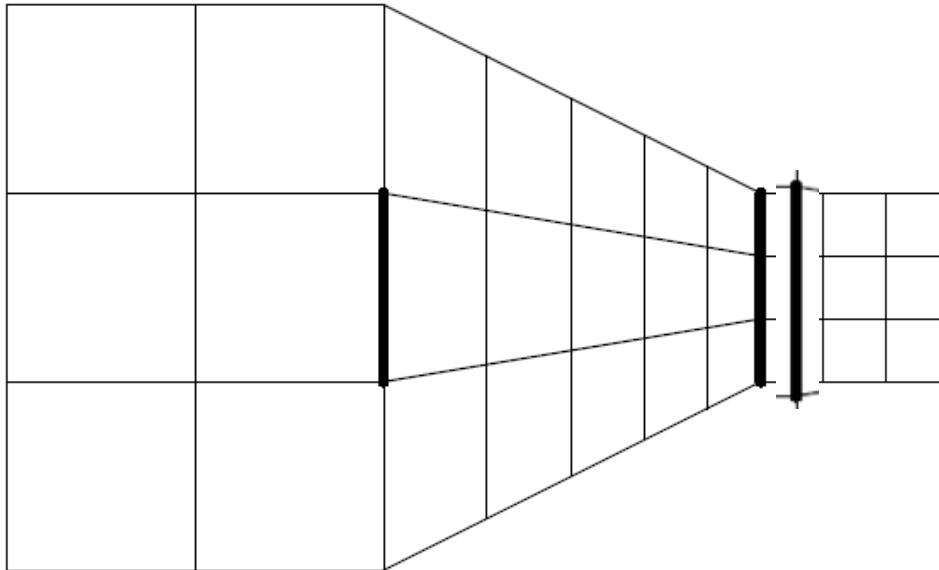


Plot of difference

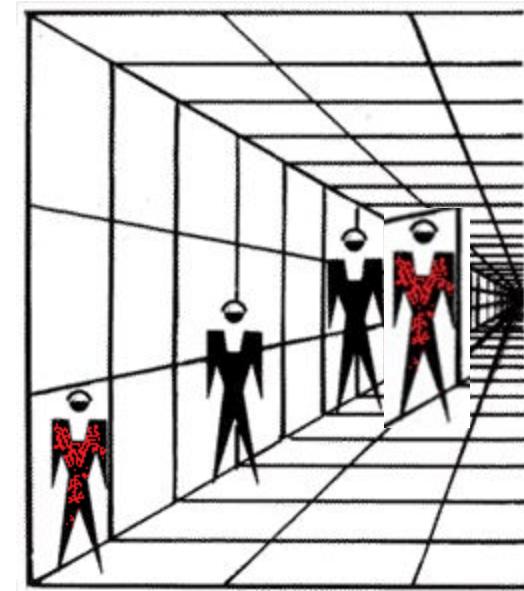


Illusions: Perspective

Which **thick** line is longer? Or, both the same?



Which figure is tallest?
Or, all the same?

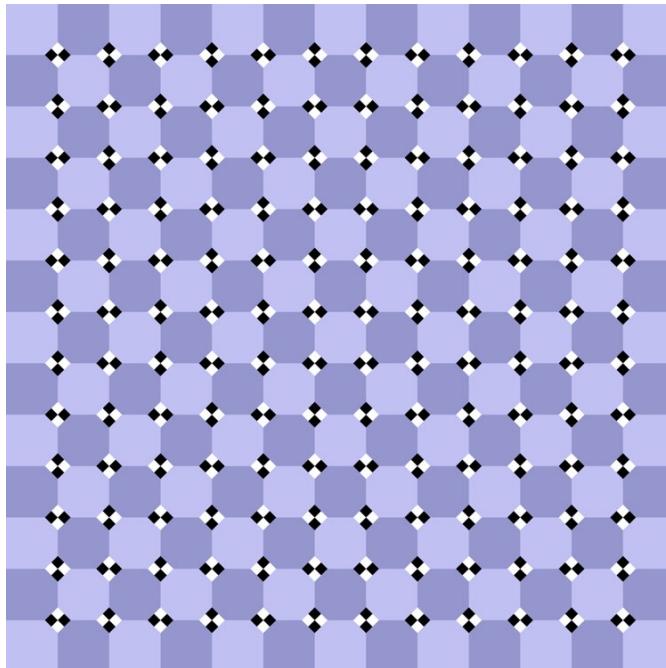


This is often called the **Ponzo** illusion: We judge the **size** of real-world objects relative to their **background** and **perspective**.

Context illusions: Lines, shapes

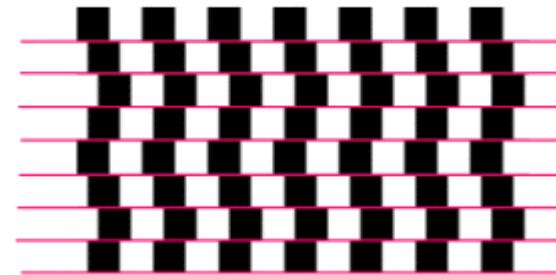
Perception of elements of a scene is affected by context, background, etc.

Are the squares straight or tilted?

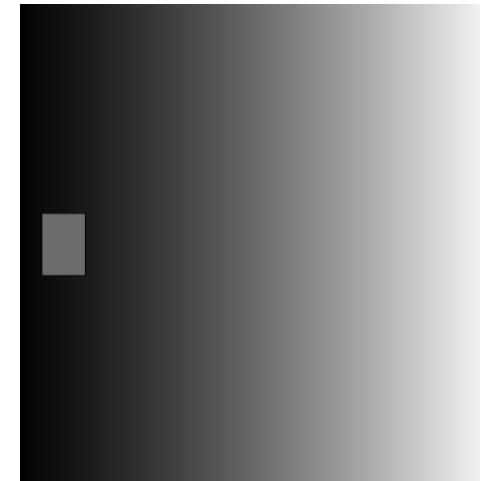


It is hard not to be fooled by these!

Are the pink lines straight or curved?

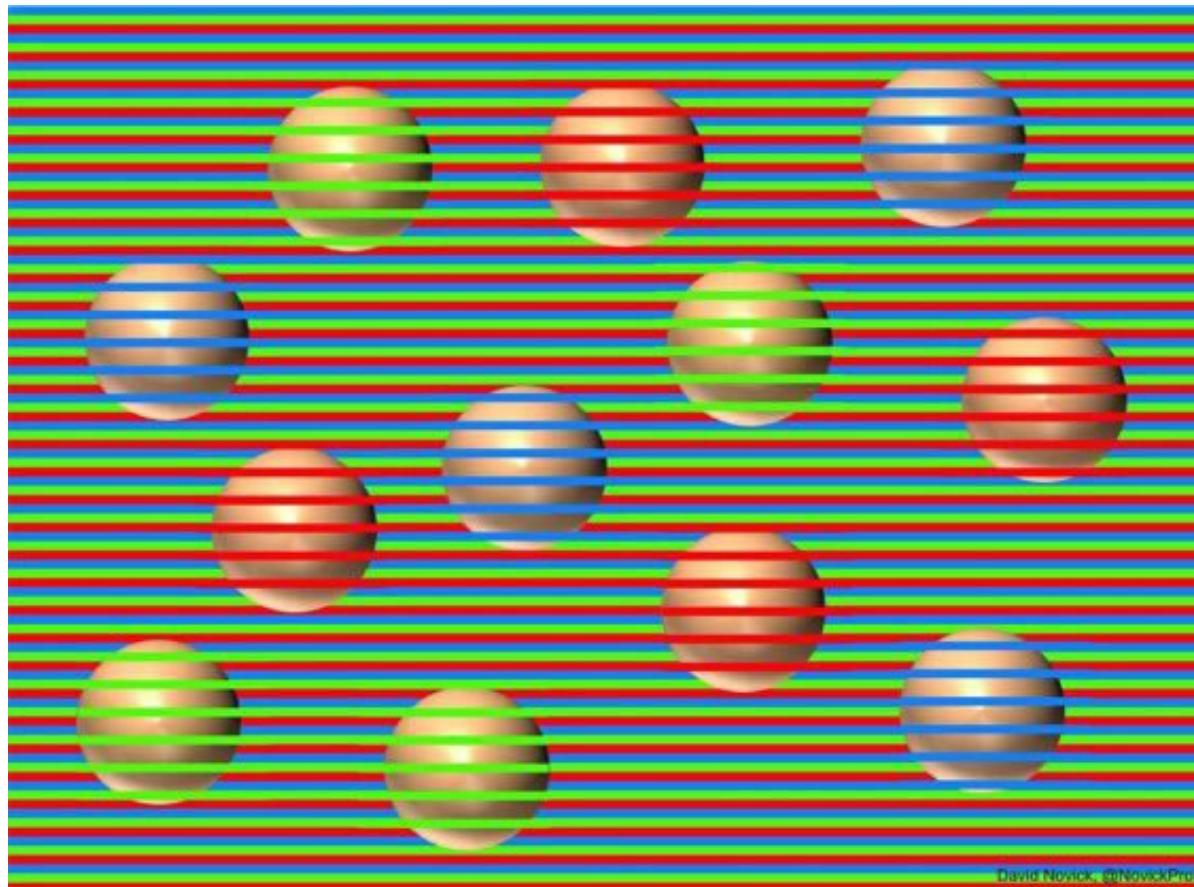


Does the rectangle change in darkness?



Context illusions: Color

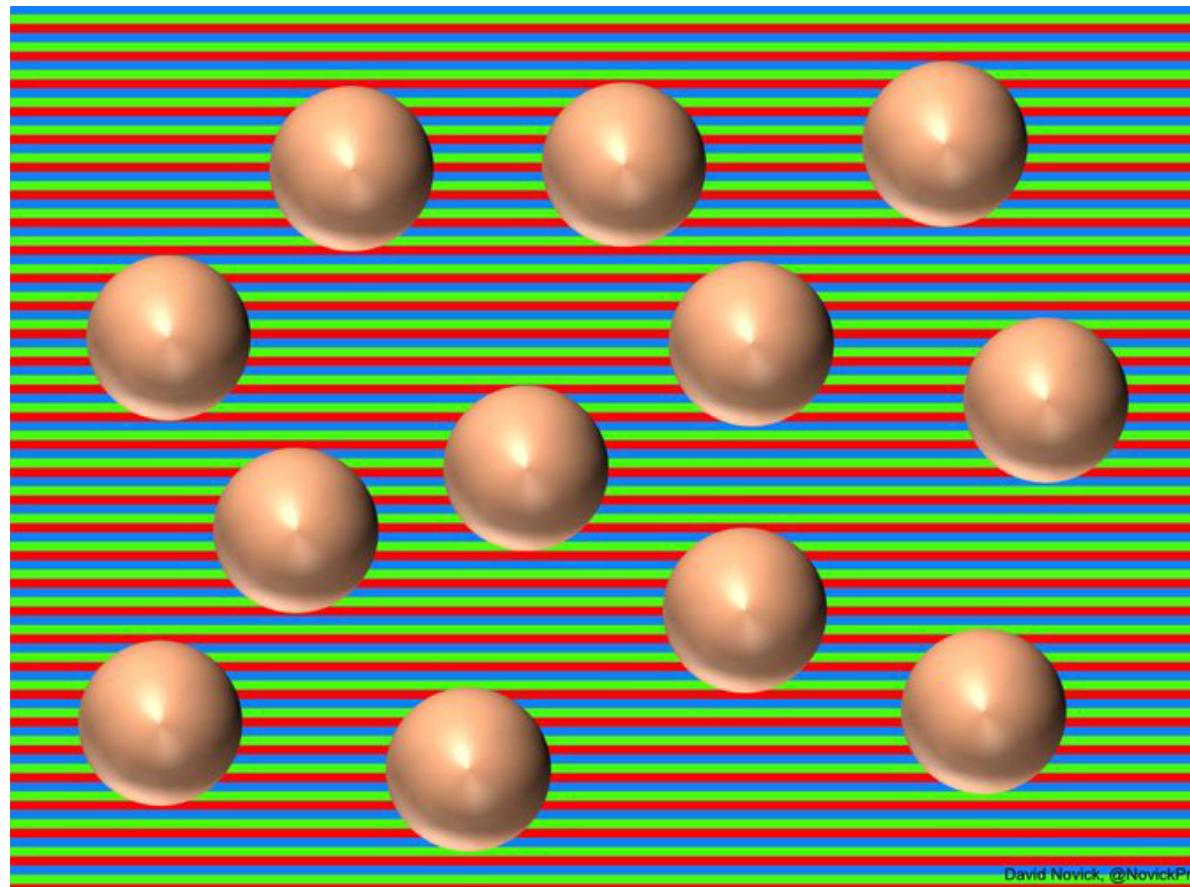
Are the balls different **colors** or are they all the **same color**?



David Novick, @NovickProf

Context illusions: Color

Removing the foreground stripes shows them all the **same**
(Munker illusion: perception of color is influenced by neighborhood)



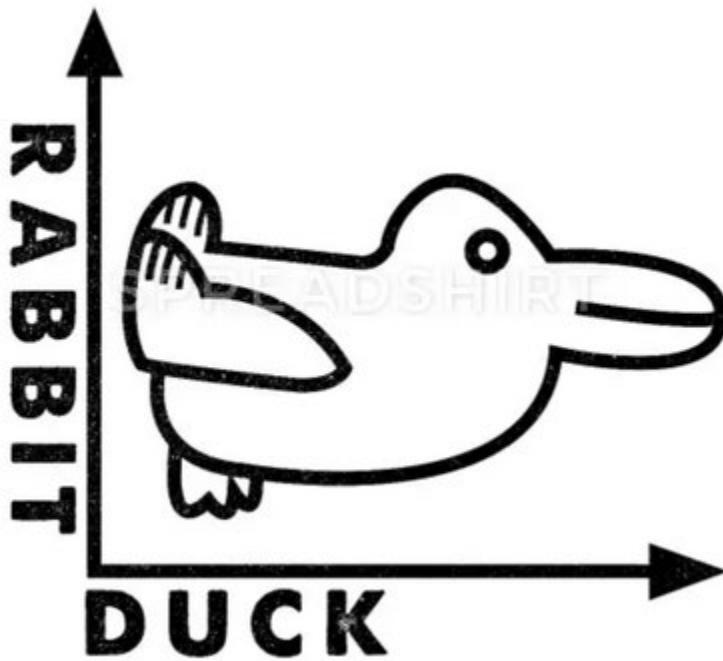
David Novick, @NovickProf

More examples: <http://engineering.utep.edu/novick/colors/>

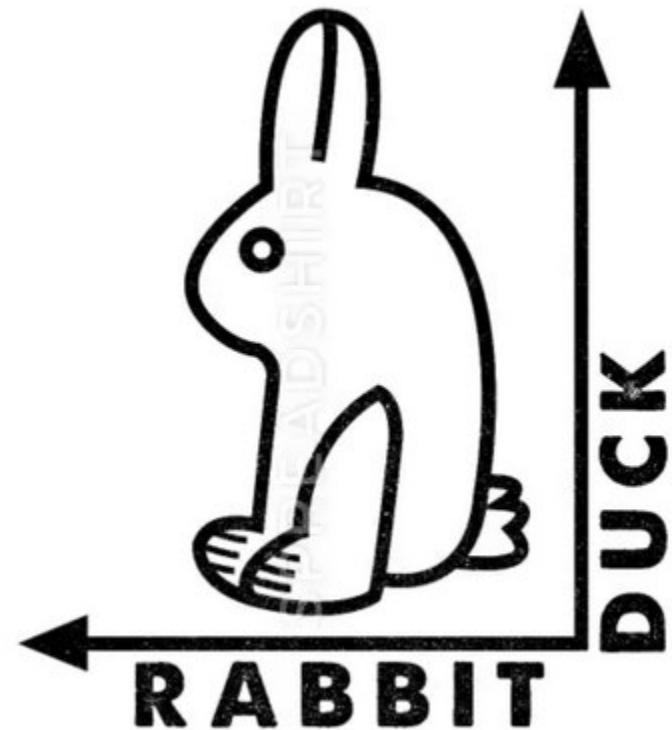
Illusions: Semantic/cognitive

Perception of object figures often shows a preference for **orientation** in nature

Is this image a duck, or a rabbit?



Duck or rabbit?



Catalog of visual/auditory illusions

<https://www.illusionsindex.org/illusions>

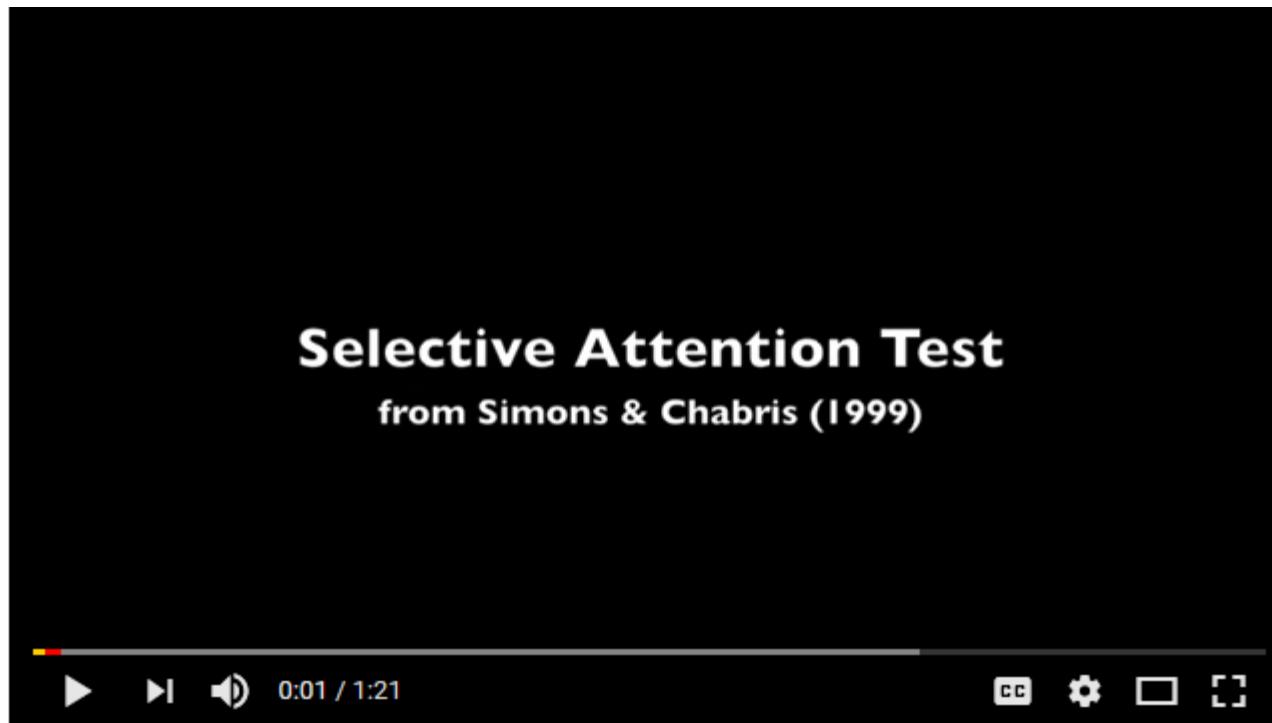
A large collection of illusions with references to research studies.

The screenshot shows the homepage of The Illusions Index. At the top, there's a navigation bar with links for HOME, ABOUT, EXPLORE (which is highlighted in blue), SUGGEST, DONATE, FEEDBACK, QUIZ, and a search icon. Below the navigation is a breadcrumb trail "Home / Explore". There are two input fields: "Filter by Tags" on the left and "Sort By" with a dropdown menu set to "Most Visited" on the right. A message "Found 63 matching results" is displayed above a grid of illusion thumbnails. The thumbnails include:

- A black and white image of a woman's face, labeled "YOUNG WOMAN OR OLD WOMAN".
- A purple square with text about exploring illusions and searching by tags.
- A green cylinder on a checkered surface, labeled "ADELSON'S CHECKER-SHADOW ILLUSION".
- A black and white spiral illusion, labeled "WATERFALL ILLUSION".
- A grid of pink circles with text about negative afterimages.
- A cartoon owl with text about the Troxler effect.
- A black and white grid pattern.

Selective attention

Attention strongly focused on some feature(s) steals attention from others



<https://www.youtube.com/watch?v=vJG698U2Mvo>

Magnitude estimation

How large are transport accidents?

How much bigger than non-transport accidents?



Estimation of length or ratios of length are more accurate than the same judgments of area.

Area vs. length judgments

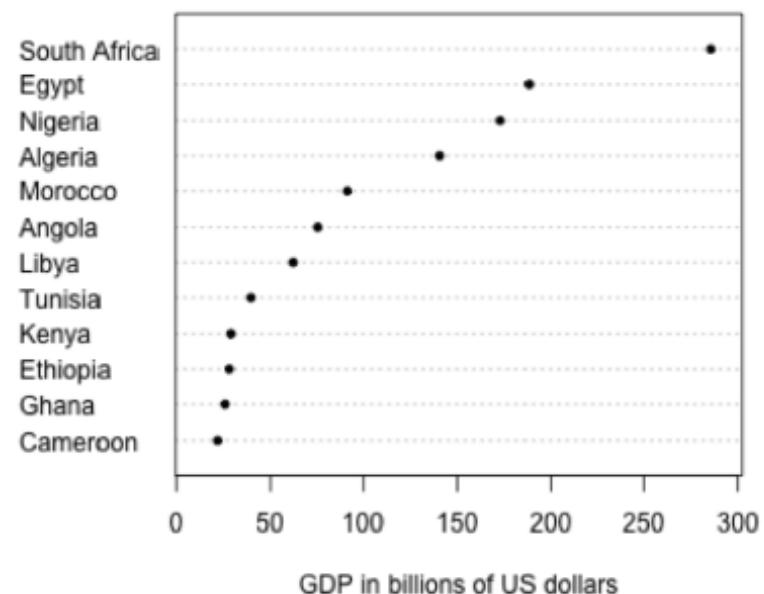
Easy: Which is **larger**— South Africa or Egypt?

Harder: **How much larger** is South Africa than Egypt? (% or ratio)

African Countries by GDP



African Countries by GDP



Judgments here based on area

Judgment here based on position along a scale

Theory: Stevens' Power Law

- How does perceived magnitude of a **sensation** relate to stimulus **intensity**?
- S. S. Stevens (1957) showed that, for many domains

$$\text{Sensation} \propto \text{Intensity}^p$$

- These provide ways to assess the **accuracy of magnitude estimation** for visual encodings
 - length: most accurate ($p \approx 1$)
 - area, depth: sub-sensitive ($p < 1$)
 - electric shock: hyper-sensitive ($p > 1$)
- But: graph perception is not always a matter of estimating **magnitudes**.

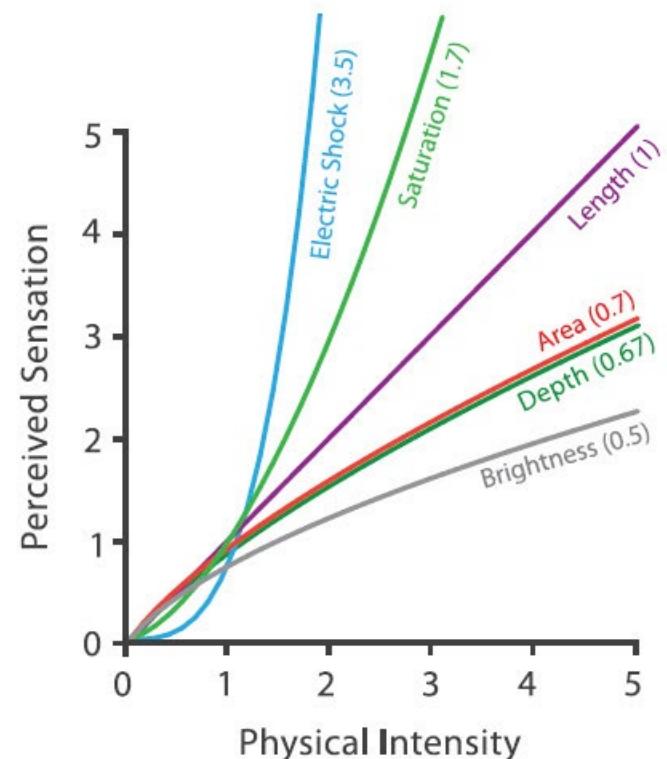


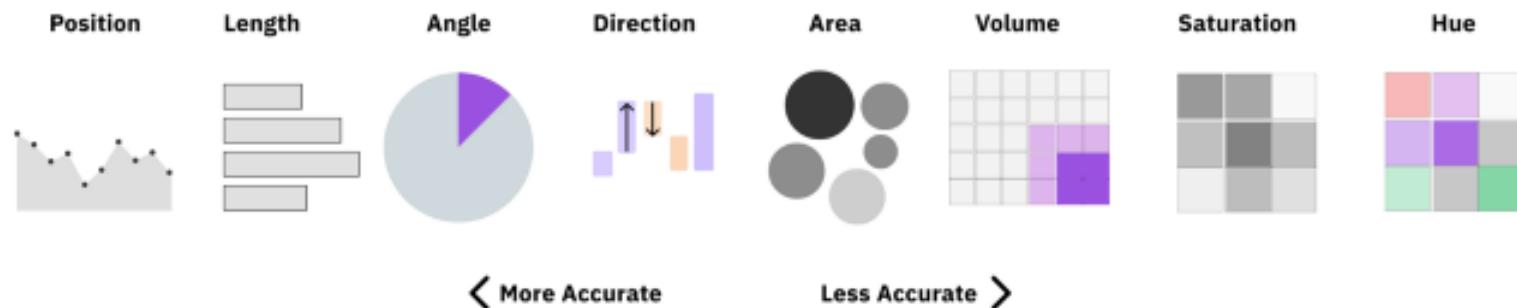
Fig. 5.7 from: Munzner, *Visualization Analysis & Design*

Theory→Practice: Scale of accuracy

A commonly used “scale” of accuracy of magnitude judgments of relative size

- How much smaller/larger is A compared to B?

Accuracy Of Visual Cues



Not necessarily the same for other tasks (Part-whole: What % is A of total?)

Accuracy: Experimental evidence

Cleveland & McGill (1984) and later Heer & Bostock (2010) carried out experiments to assess the relative accuracy of magnitude judgments for different visual encodings

The task here is to estimate the %age of the smaller highlighted portion.

The details of these studies are interesting & important – more next week

The graph of these results is a great model for data display

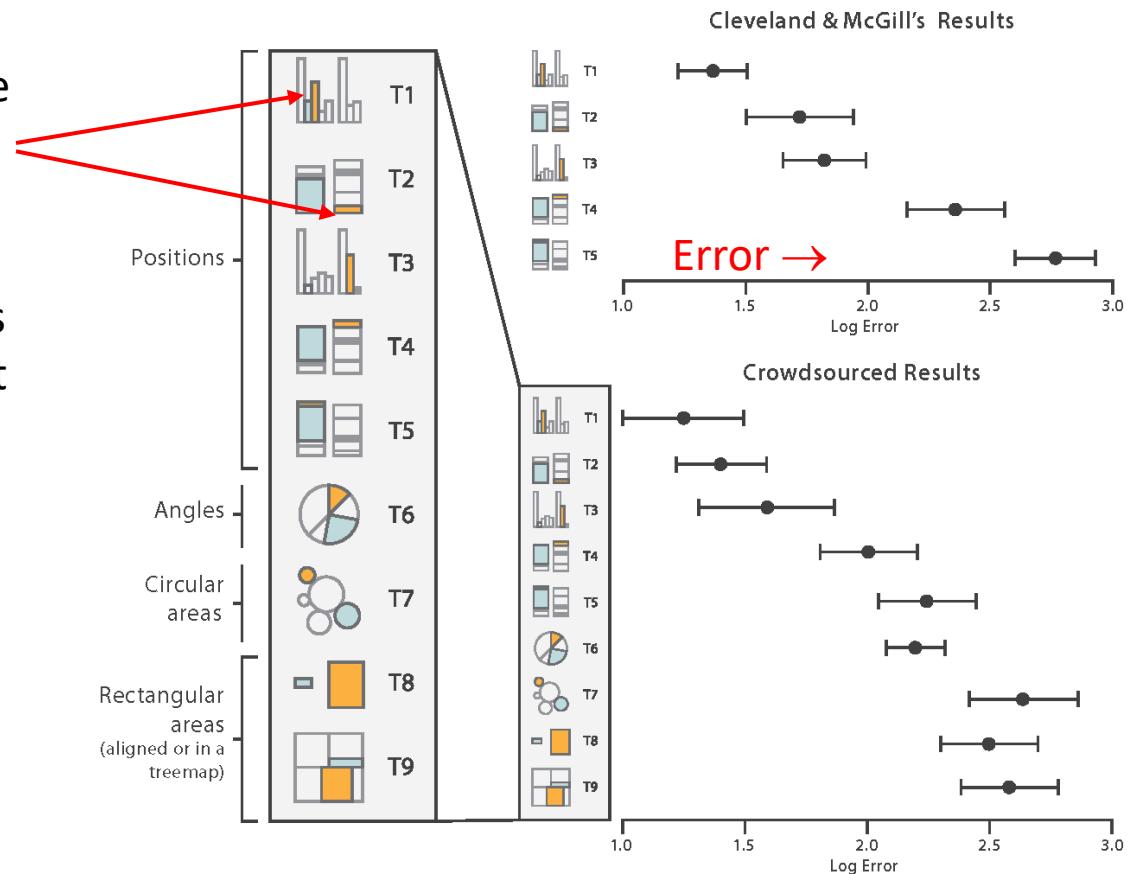


Fig. 5.8 from: Munzner, *Visualization Analysis & Design*

Encodings: Types & ranks

Based on this, Munzner (2015) proposes a ranking of visual attributes for **ordered** & **categorical** variables in data displays, with different channels

These hold when the task is to estimate a **magnitude**.

A different ranking may occur for other graph-based tasks.

angle (pie charts) – good for % of total judgments

color (mosaic plots) – good for pattern perception

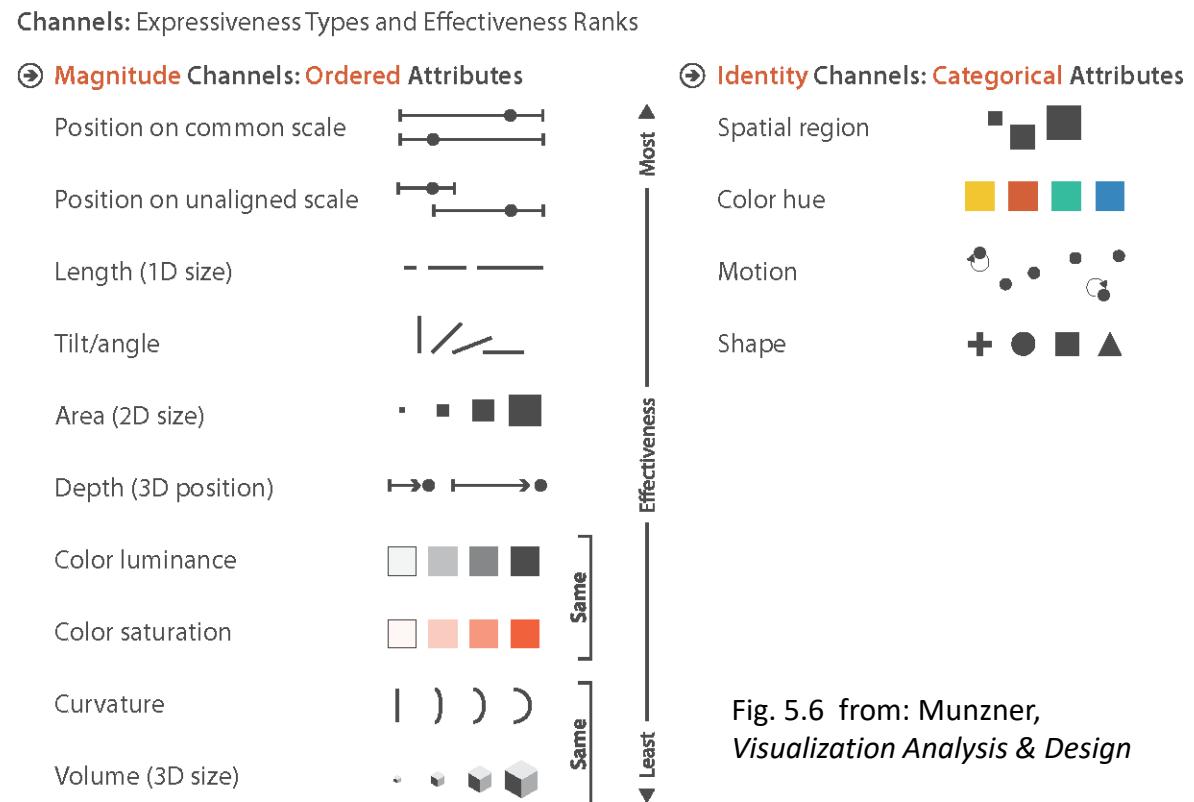


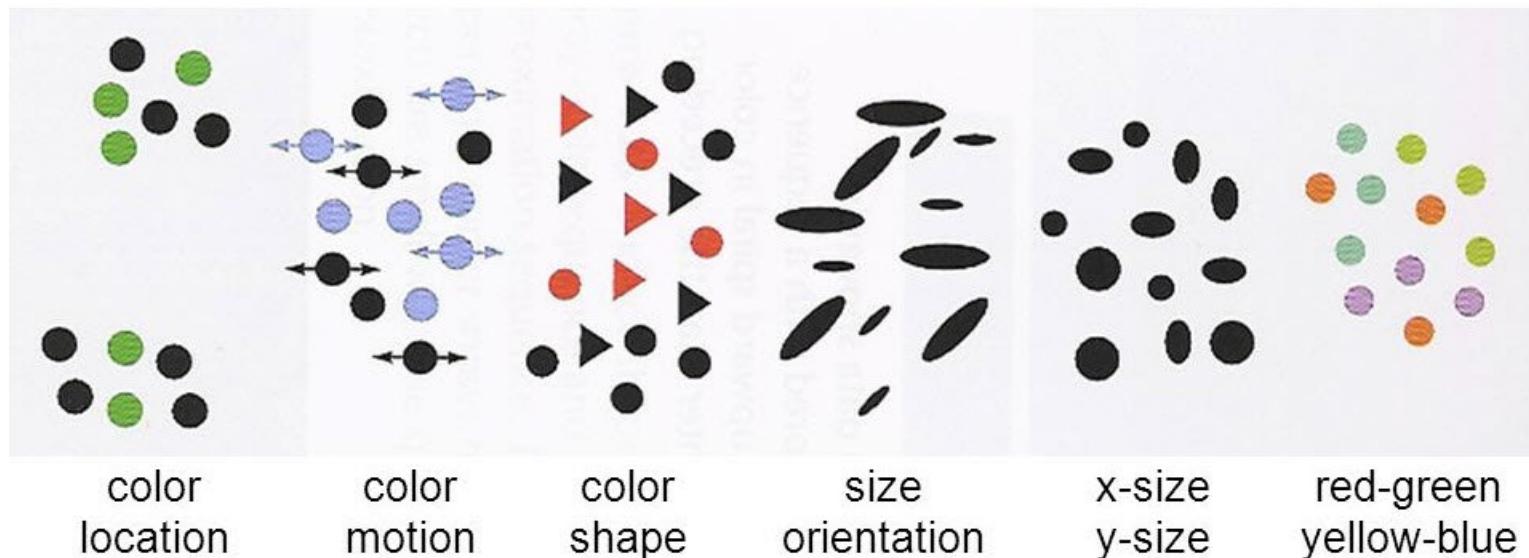
Fig. 5.6 from: Munzner,
Visualization Analysis & Design

Integral & separable encodings

- Some encodings can be viewed **independently**
 - two different variables **can** be decoded separately
- Some **combine** with each other to some degree.
 - different variables **cannot** be easily decoded separately

← Separable

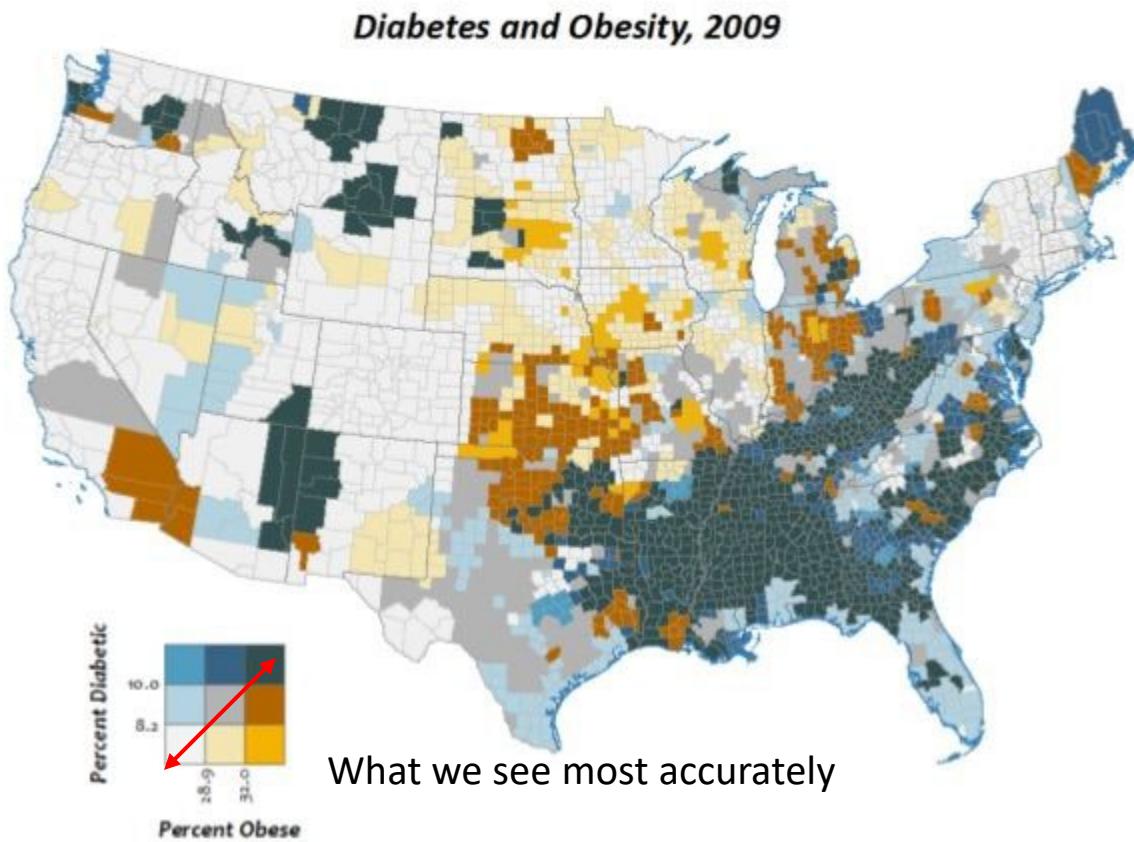
Integral →



From: Ware, *Information visualization: Perception for Design*

Integral dimensions

A bivariate U.S. county-level map showing:
% diabetic (**saturation**) and % obese (**hue**)



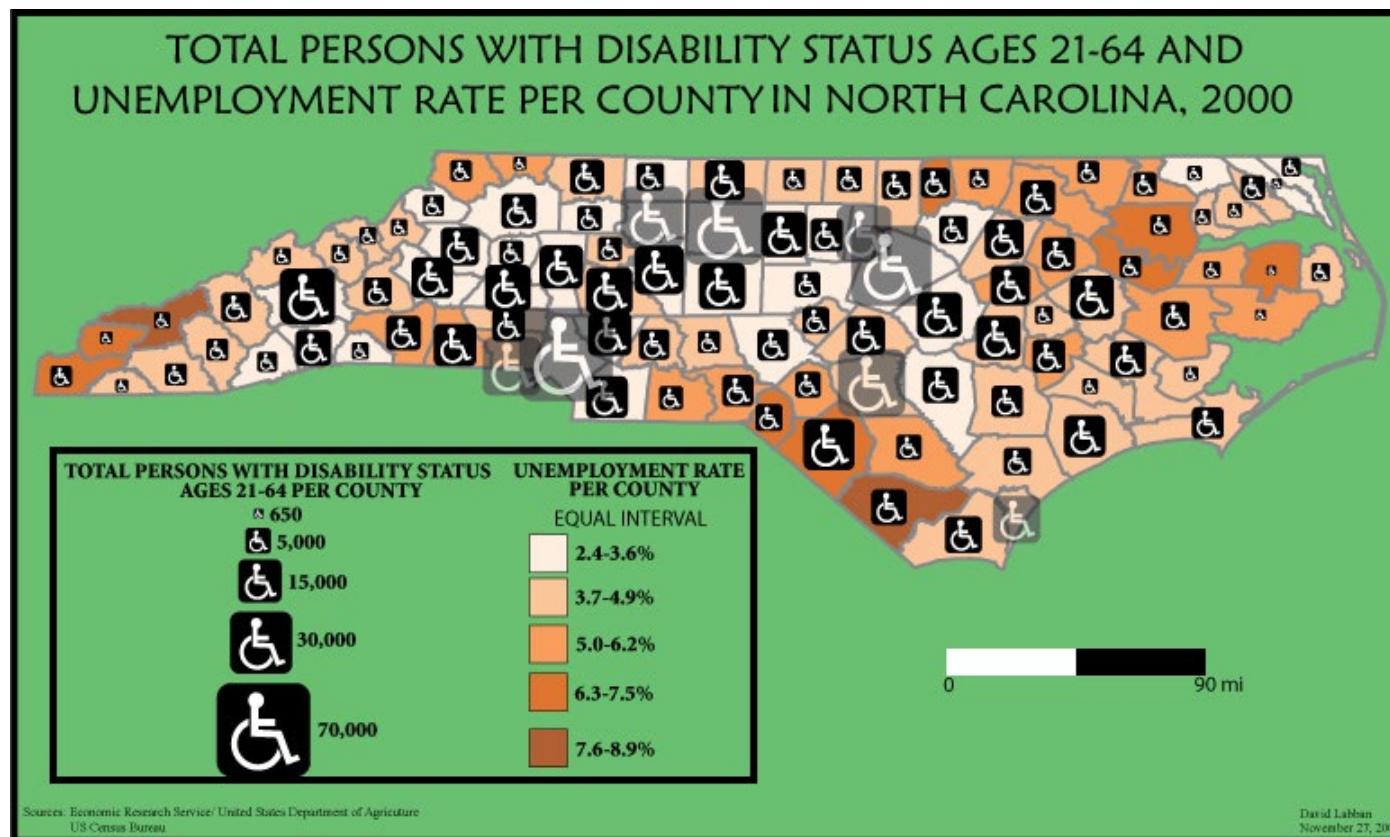
It is difficult to see variations in **diabetes** separately from **obesity**

The eye is tuned to the positive correlation between these dark (blue, tan) vs. light color

Separable dimensions

Bivariate map of N. C.: disability (icon **size**) and unemployment rate (background **saturation**)

- These can be seen separately
- (However, total disability is confounded with population density)



Anomaly detection (outliers)

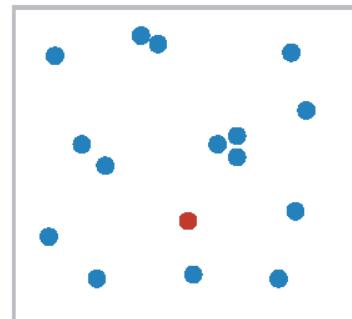
Find the red dot ● in each of the following displays

- This task is easiest when all the rest are blue dots ●
- Next easiest when **only shape** distinguishes the red dot ■
- Hardest when both **color and shape vary** ● ■

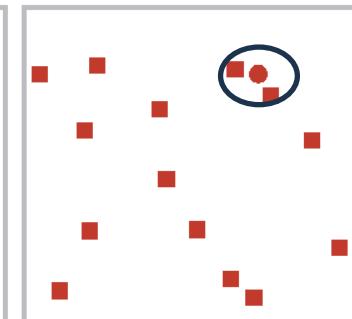
Sometimes called
“popout” effect.
Not a good term.

This is important in
designing graphs to
highlight some points.

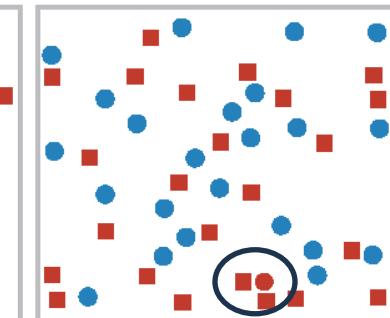
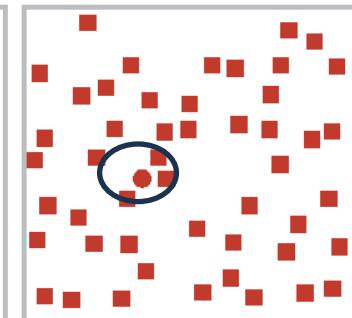
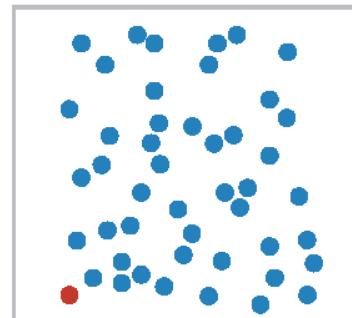
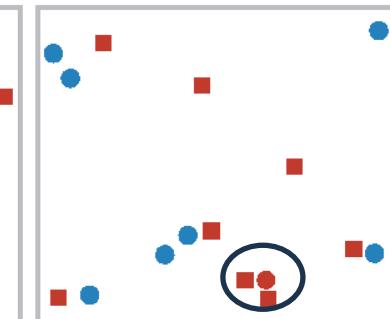
Easy



Middle



Hard



Anomaly detection

For each display, find the anomaly shown at the left

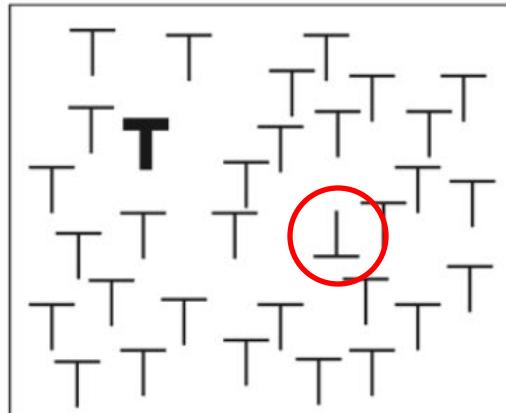
Color and shape: What is easy or hard depends on the background



difficult



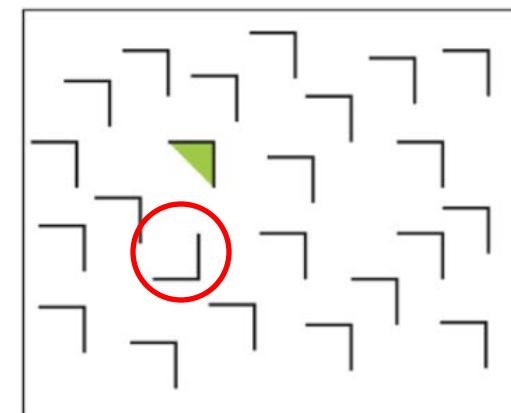
easy



difficult



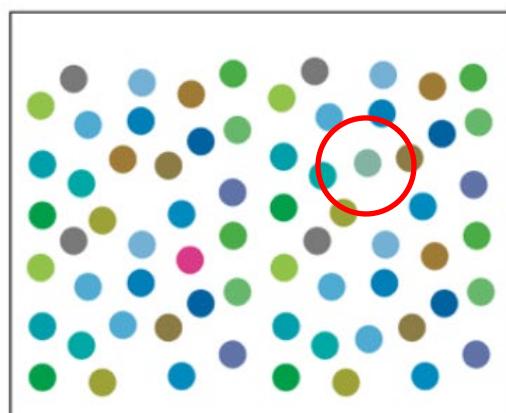
easy



difficult



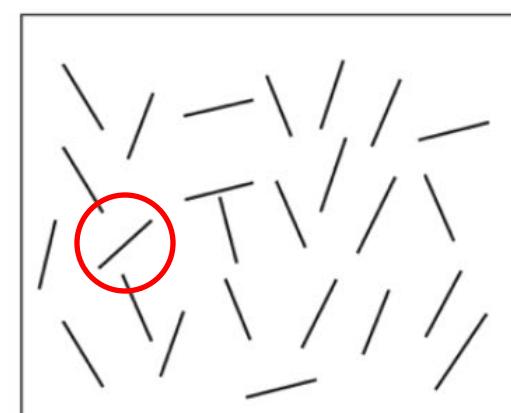
easy



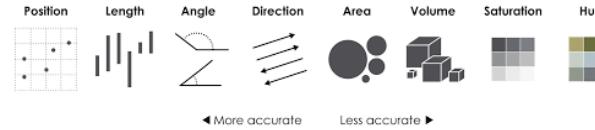
difficult



easy



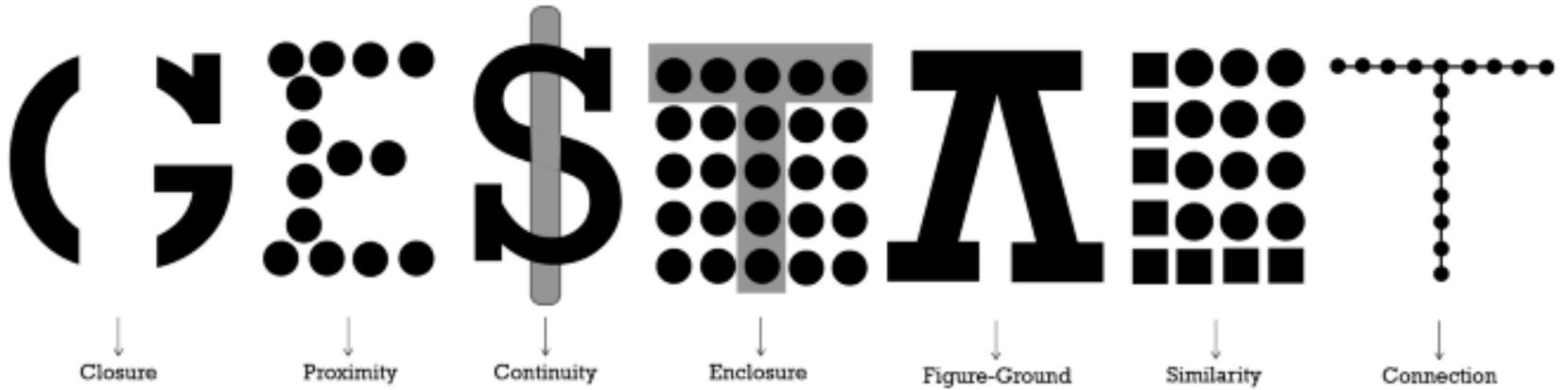
Encodings: Lessons



- Ordered variables
 - Prefer encodings at the top of the hierarchy (position along a scale) to those at the bottom (color saturation, curvature)
- Favor **separable** encodings
 - Use color and another attribute--- shape, size, orientation
 - Don't overload symbols--- probably two at most
 - Avoid mixing two aspects of color or two aspects of shape
- Small multiples
 - Reduces the need for multiple encodings within a panel
 - But, makes direct comparison more difficult
- **Highlighting:** to draw attention to one group, use a pre-attentive attribute

Encodings: Lessons

- Best to show quantitative variables with **position or length**
- Bar charts:
 - Best encoding via length → start at 0
 - Avoid stacked bars (not aligned), where possible
- Dot charts:
 - Best encoding **via** position along a scale → start at 0
- Frequency data:
 - area/color encoding to show patterns
 - sqrt or log scale often useful to show magnitude
- Color: choose **sensibly ordered hues** or saturation
- Arrangement
 - make comparisons easier by placing things to be compared nearby



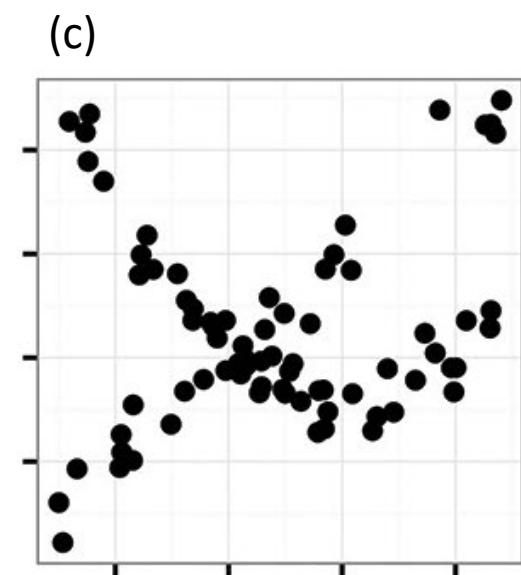
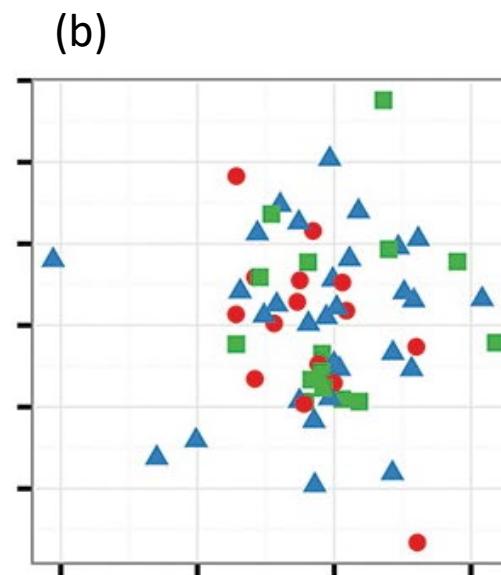
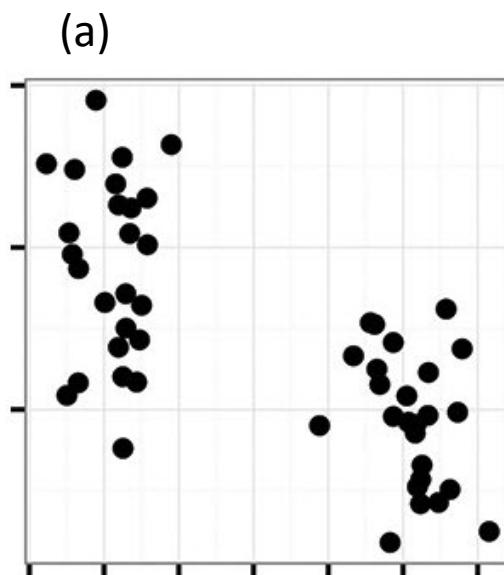
Gestalt principles of graph perception

Gestalt principles

- Perception as **top-down** process governed by holistic principles. “Gestalt” = “form”
 - **proximity**: elements close together likely to belong to the same unit
 - **similarity**: more common visual elements increases belonging together
 - **good continuation**: elements that blend together are likely in the same unit
 - **common region**: elements in the same region likely belong together
 - **closure**: elements that make a meaningful whole belong together

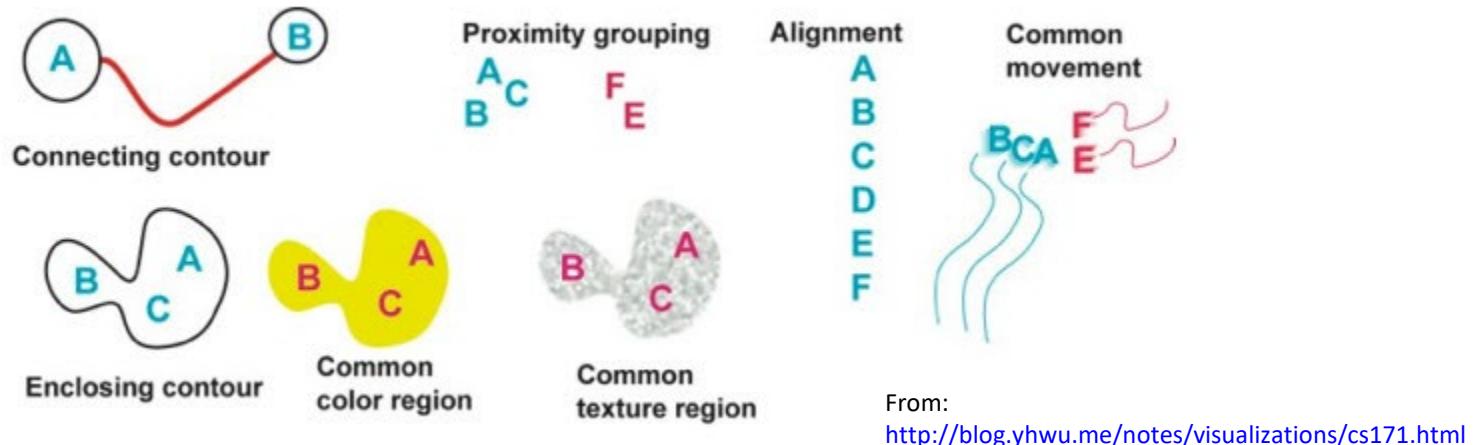
Gestalt principles

- (a) **proximity** creates impression of 2 groups
- (b) **similarity**: 3 groups via color & shape
- (c) **good continuation** gives impression of 2 groups

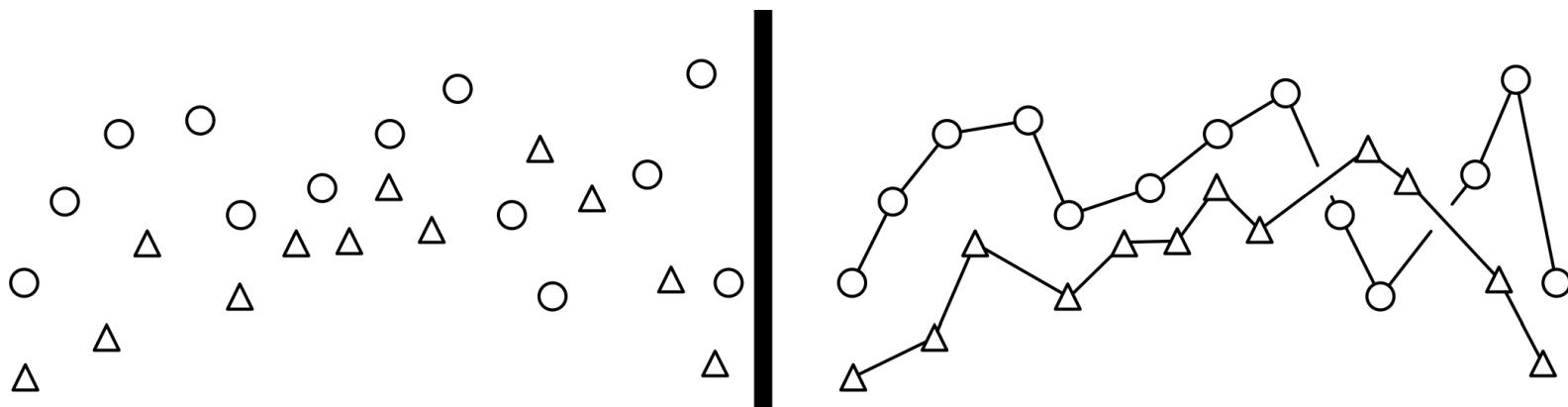


Using Gestalt ideas in data graphs

Make grouping apparent



Why lines are good in time series graphs



Closure

The Gestalt brain “wants” to make perception simpler by joining up disparate elements into coherent, meaningful wholes

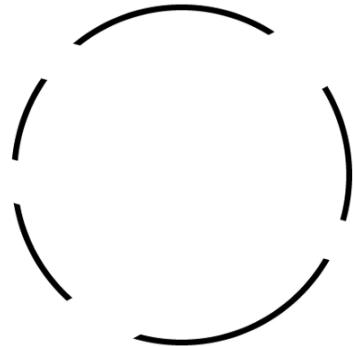
Logos: Empty space
or a symbol?



Closure



5 arcs or a circle?



blobs or an animal?

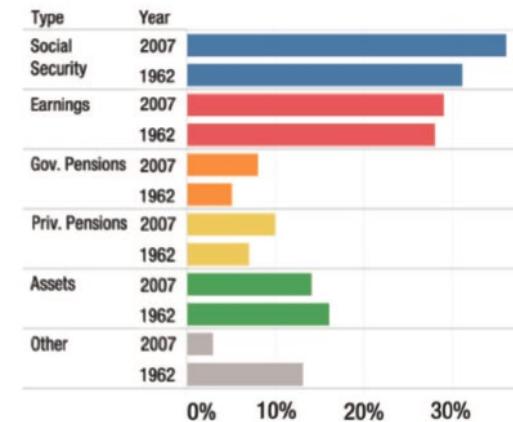
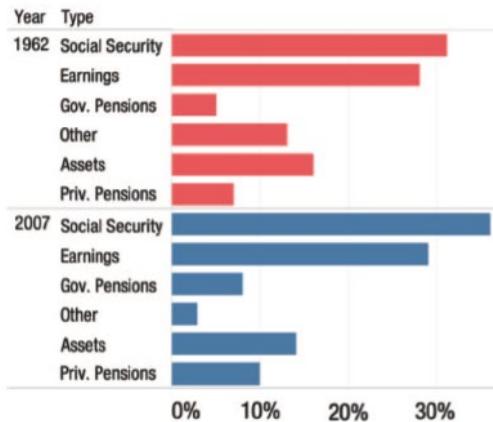


Q: Are these
top-down or
bottom-up?

Visual grouping & comparisons

Combination of color & proximity grouping → different visual comparisons are easier or harder

Did earnings increase or decrease from 1962-2007?



What was the most frequent baseball term?
Which terms go together?



Comparisons in a word cloud:

- weakly controlled by color;
- better controlled by proximity

Visual grouping & comparisons

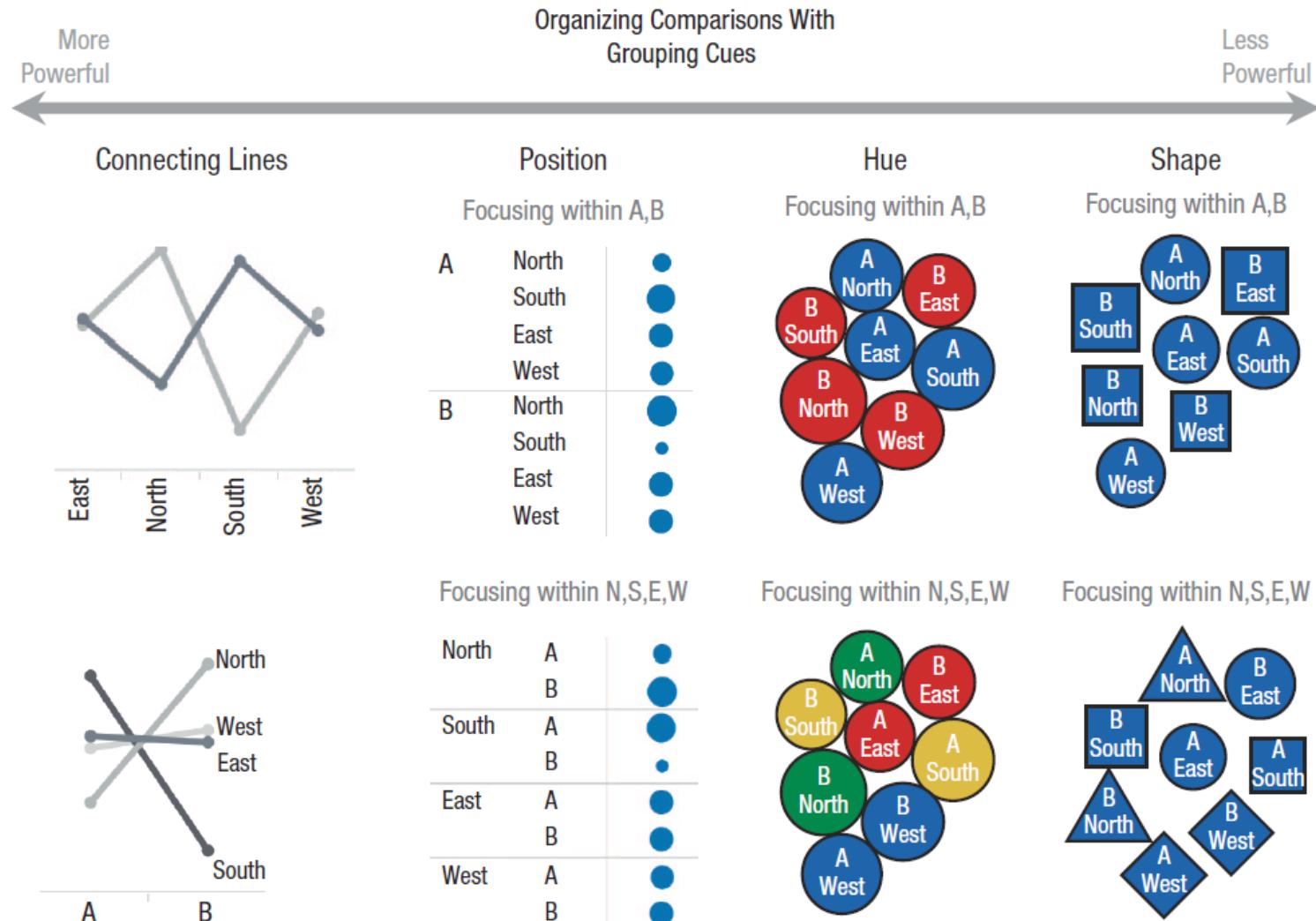
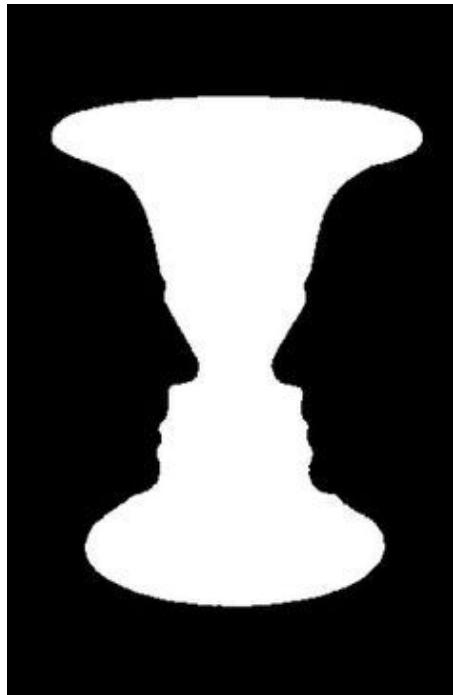


Fig. 8. Several grouping cues that can control how data values are compared. Connecting lines are particularly powerful cues, followed by proximity, color, and shape (Brooks, 2015).

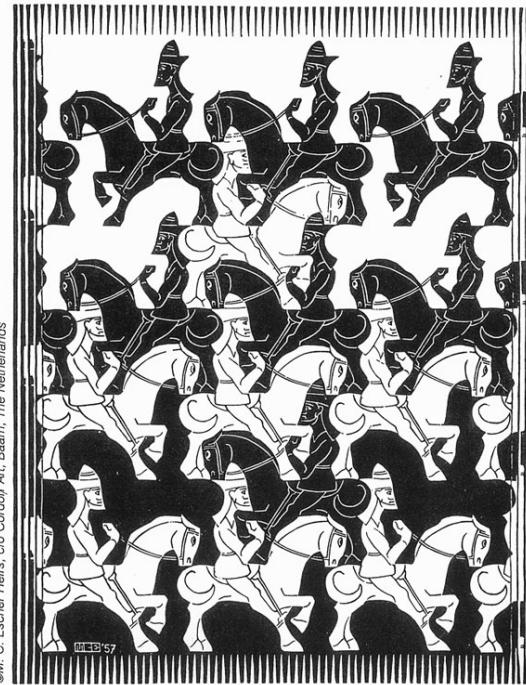
Figure - Ground

What is the figure? What is the background?

Face or vase?



Black or white soldiers?



Face or park?



These examples all use different techniques to create ambiguous figures

Ambiguous figures: Priming

Can you see the poodle in
this scene?

What about the man?

Semantic priming: Suggestion
increases likelihood of perception

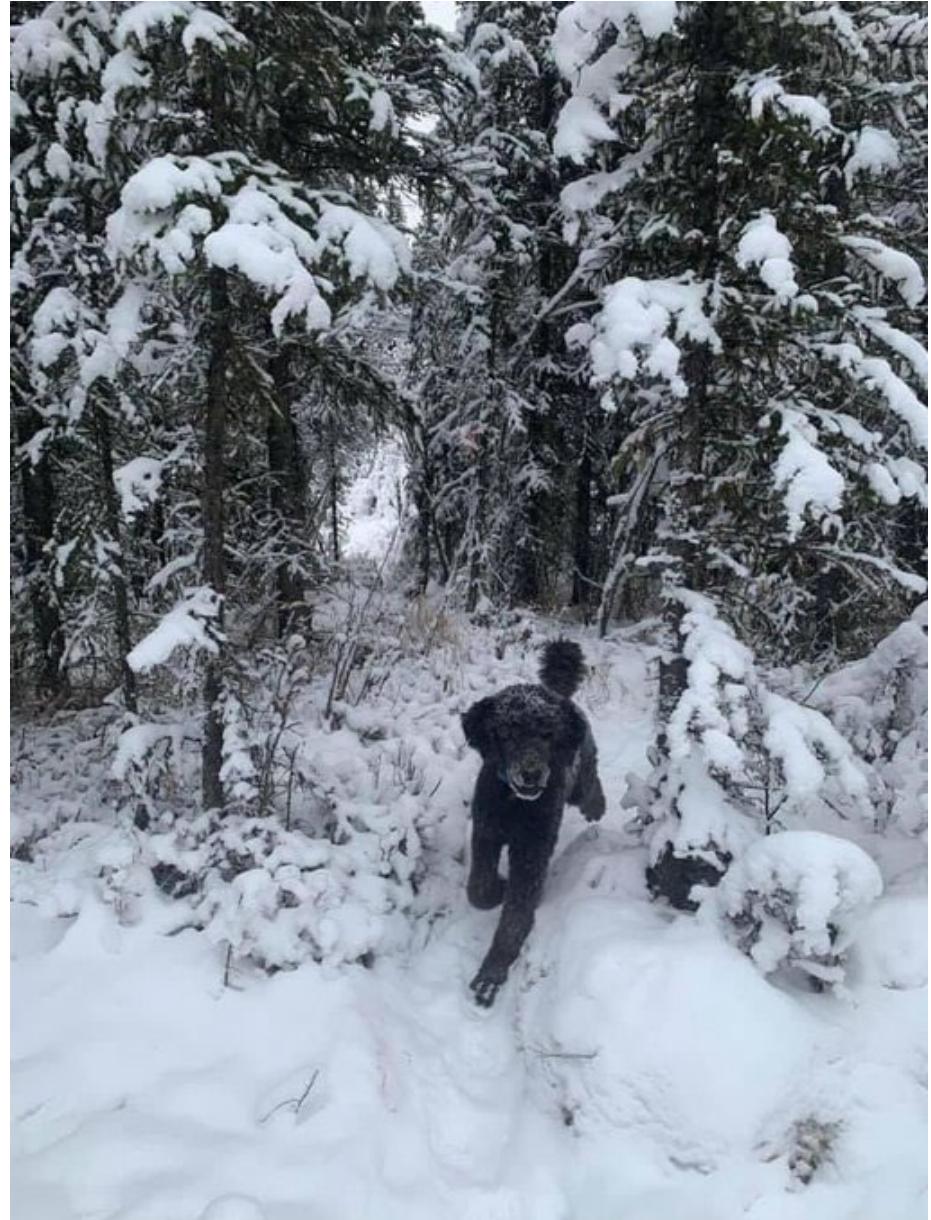
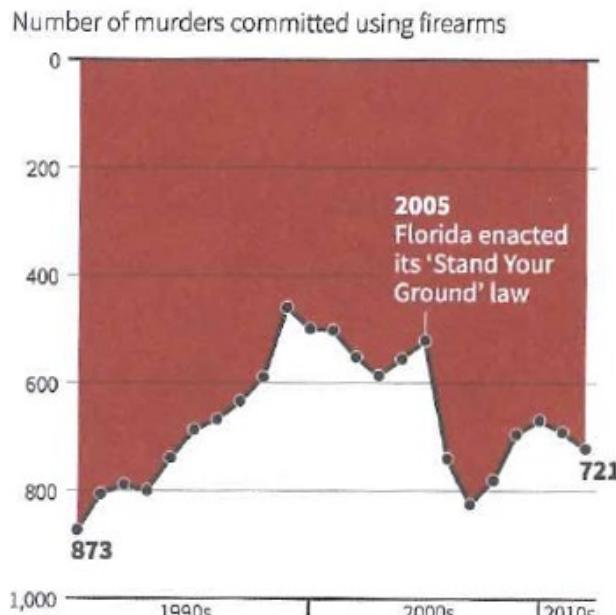


Figure - Ground

This graph inverts the y-axis, and shades the area above the curve

Gun deaths in Florida



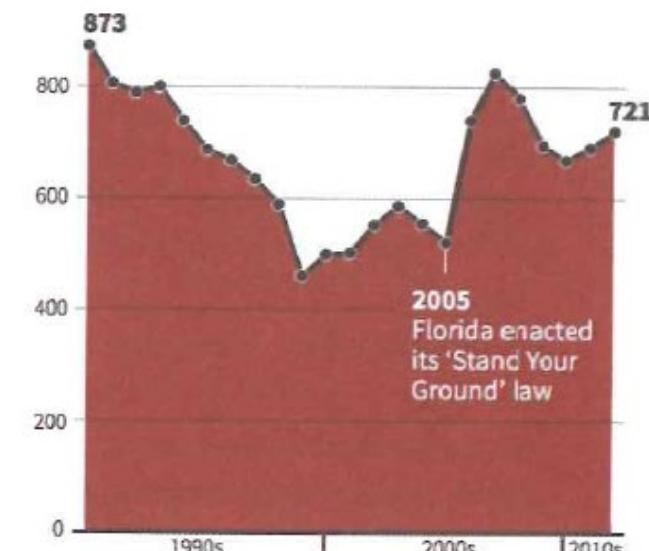
Source: Florida Department of Law Enforcement

REUTERS

A more conventional version of the same graph

Gun deaths in Florida

Number of murders committed using firearms



Source: Florida Department of Law Enforcement

We tend to see 1999 & 2005 as high points

Gun deaths increased after the
'Stand your ground' law

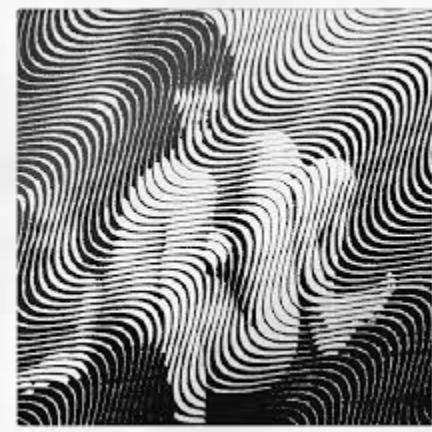
Discussion

What perceptual features or principles are involved in your reading or understanding of these figures?

or this?



What about this?



Top-down ?
Bottom-up?
Gestalt?



or this?





Color

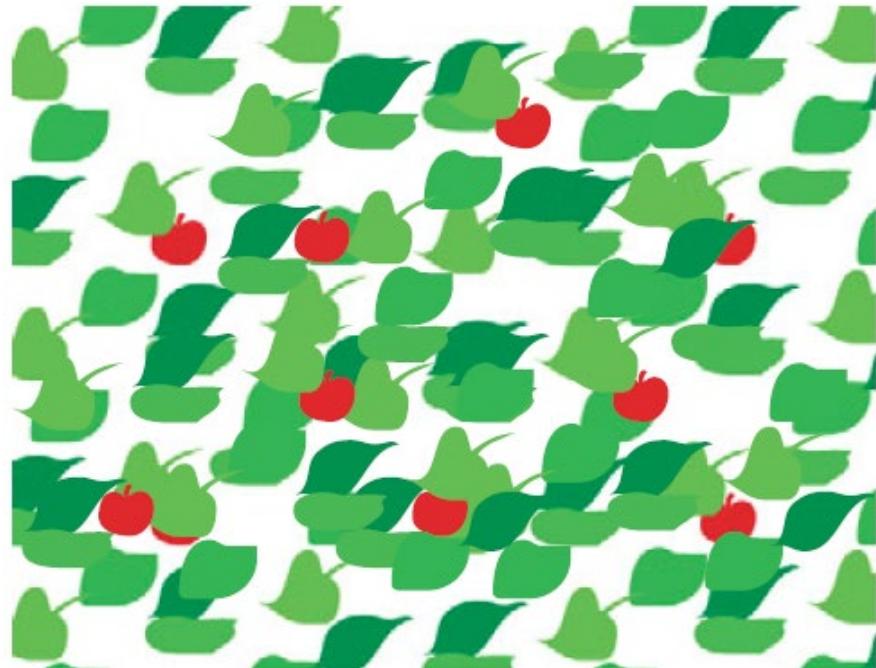
Color: Functions in data graphics

Color serves to: **highlight**, **identify**, and **group elements** in a visual display

Find the cherries in this display:



Color acts as a **preattentive** attribute here

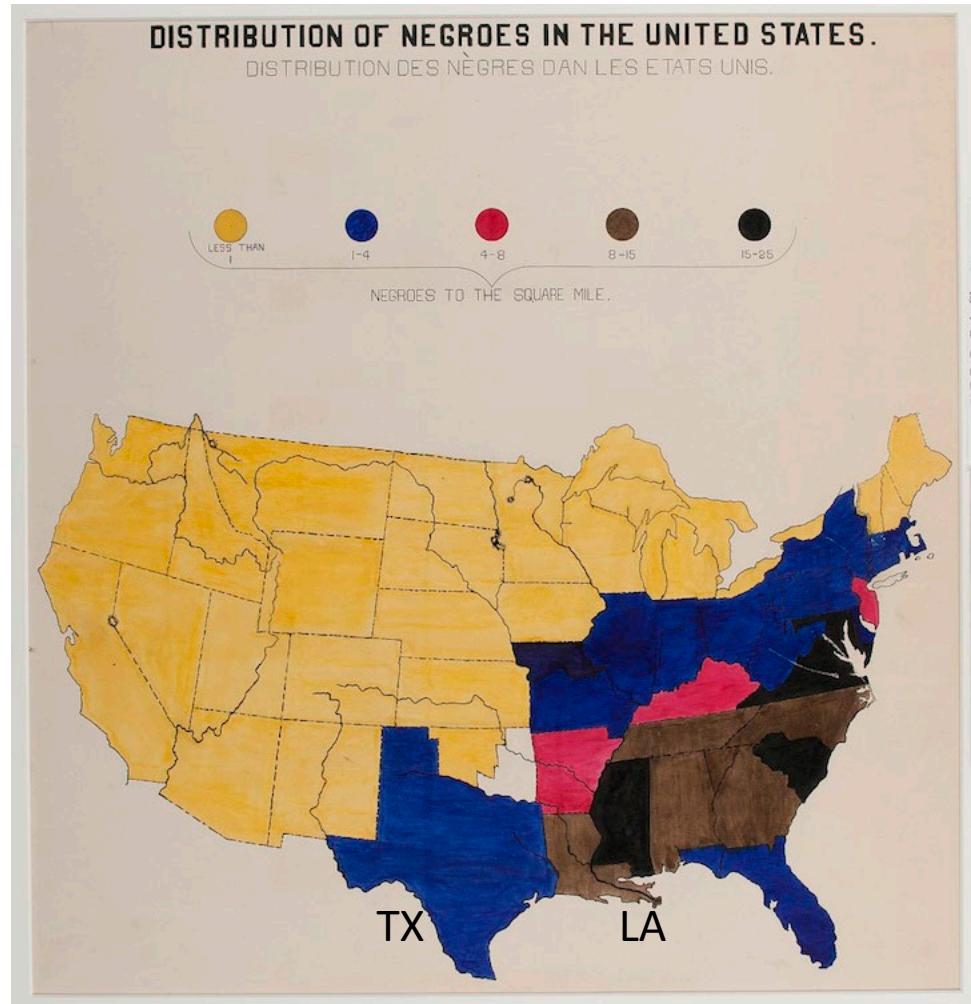
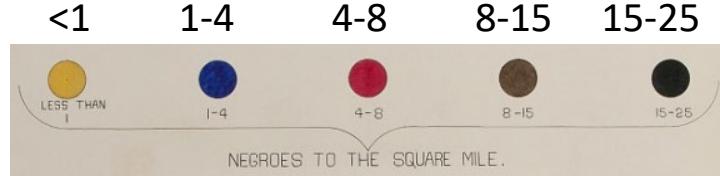


Nice graphic, naïve about color

W.E.B. DuBois presented this as part of an exhibition on The American Negro at the 1900 Paris Exposition.

It is a landmark graphic, but shows no understanding of the use of color for a **quantitative** variable.

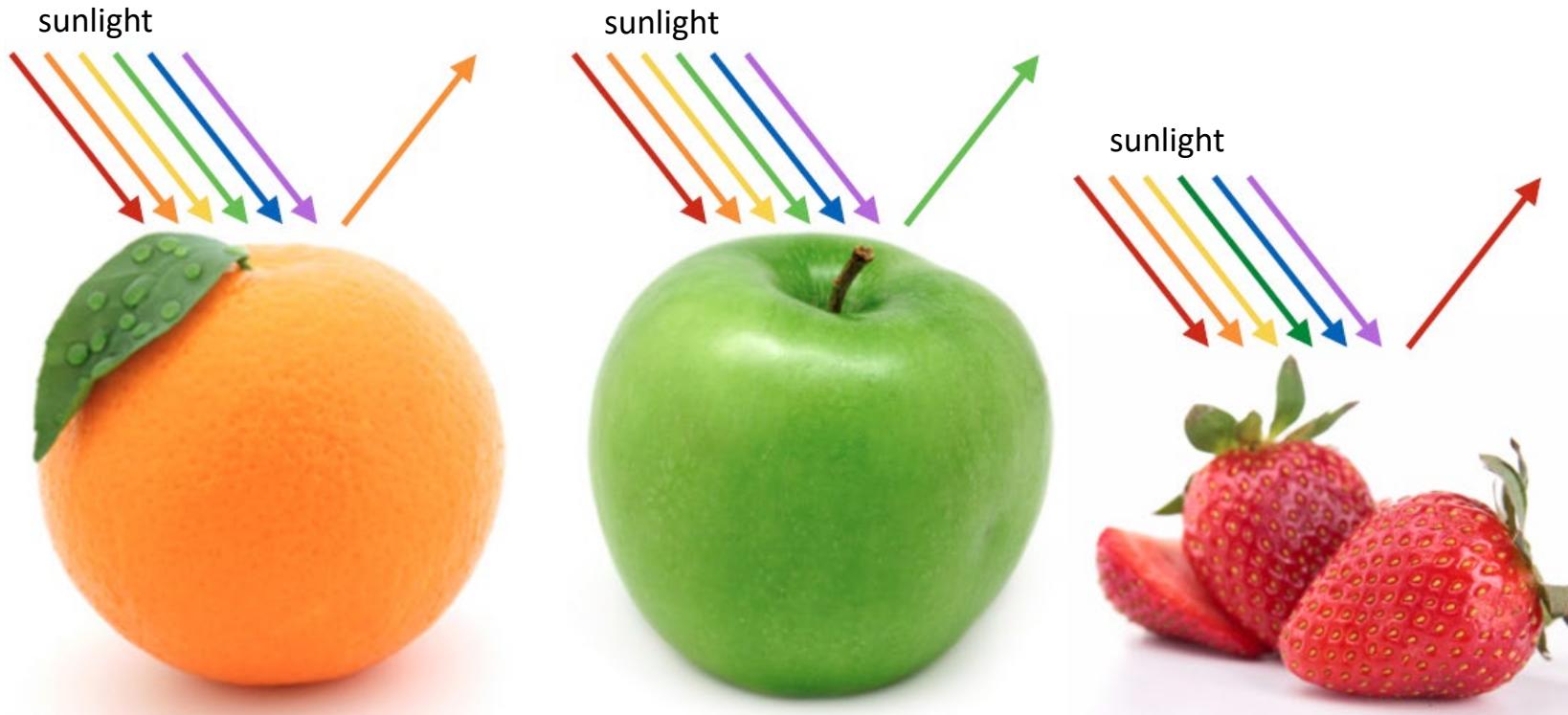
Q: Are there more Negroes per sq. mile in Texas (TX) or Louisiana (LA)?



Object color

What makes an orange look **orange**, a green apple look **green**, or a strawberry **red**?

Objects absorb colors from the rainbow, but **reflect** their own



Is this a color photo?

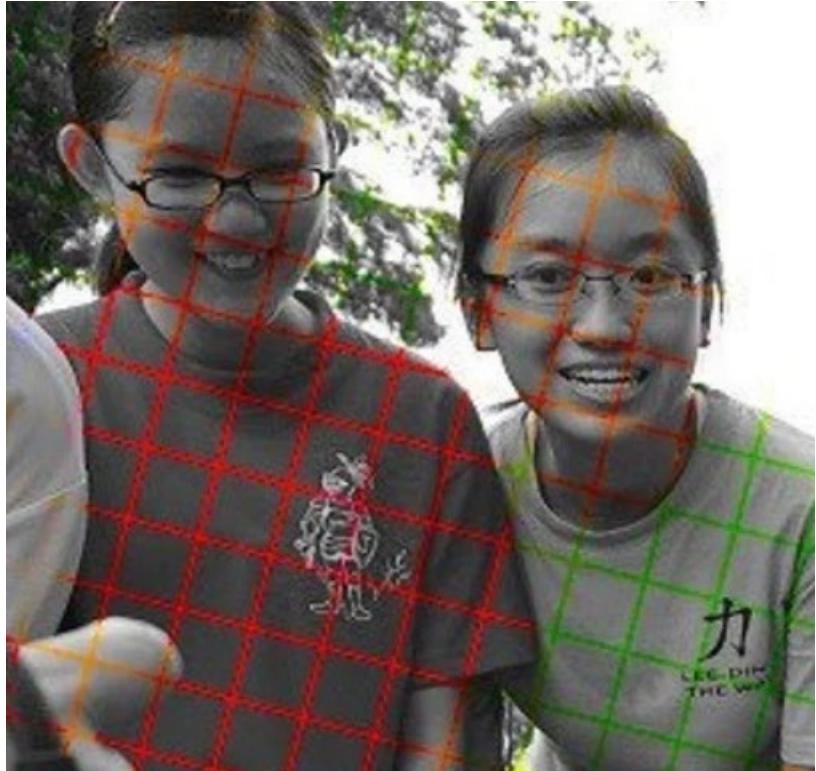


"2011-07-12-Railway People" by Chuwa (Francis) is licensed under CC BY-SA 2.0, color illusion remix by <http://pippin.gimp.org/>

Is this a color photo?

Graphic artist Øyvind Kolås overlaid red, orange, yellow, blue, and green grid lines over a B/W photo.

The colored grid causes us to perceive it as having smooth color

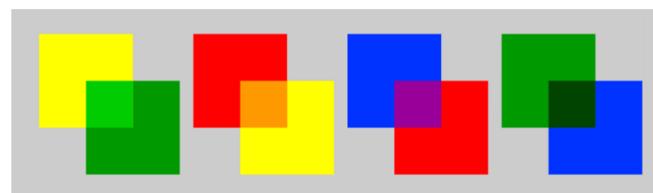
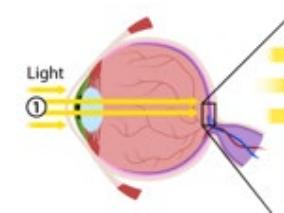


Color perception is influenced by top-down processes of **scene recognition**

<https://petapixel.com/2019/07/31/this-black-and-white-photo-uses-color-grid-lines-to-trick-your-brain/>

Color: Aspects in data graphics

- Perception: trichromatic theory
 - How the eye sees color
- Color spaces:
 - RGB (additive), CMYK (subtractive)
 - HSV, HCL: perceptually based
- Color palettes for computer graphics
 - ColorBrewer: sequential, diverging, qualitative
 - Color-blind safe ?
 - Photocopy safe ?
- Transparency



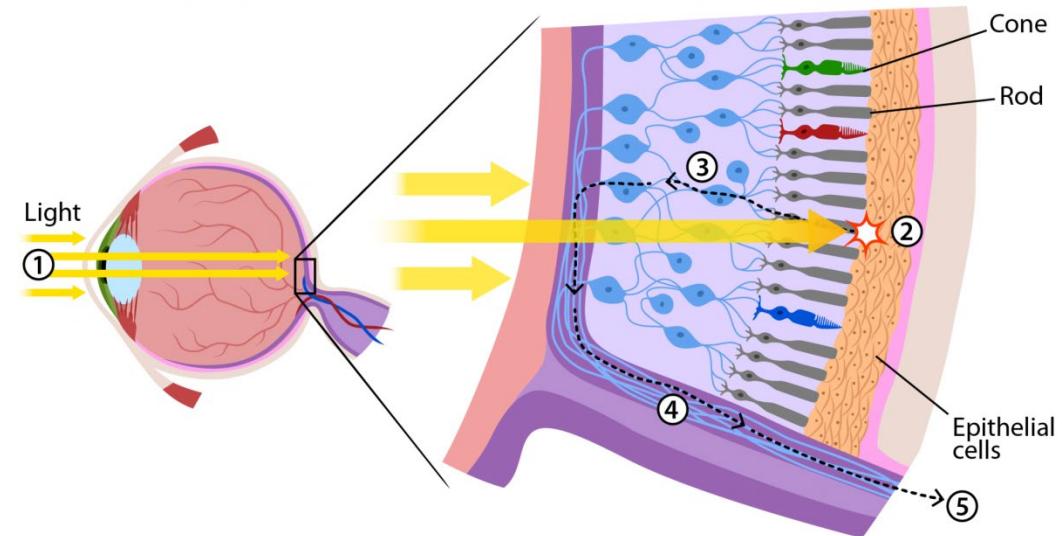
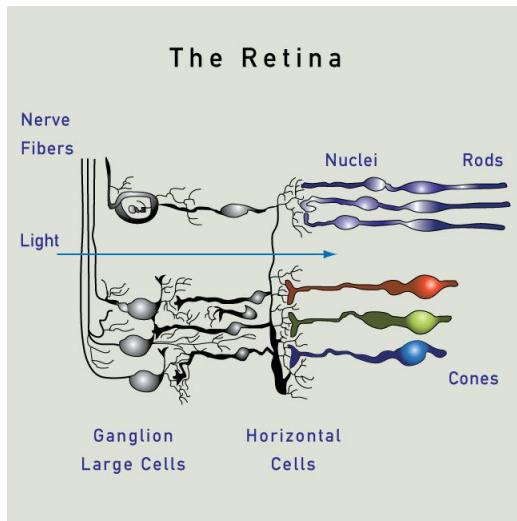
Perception: The human eye

- Retina:

- rods (monochromatic),
- cones (R, G, B)

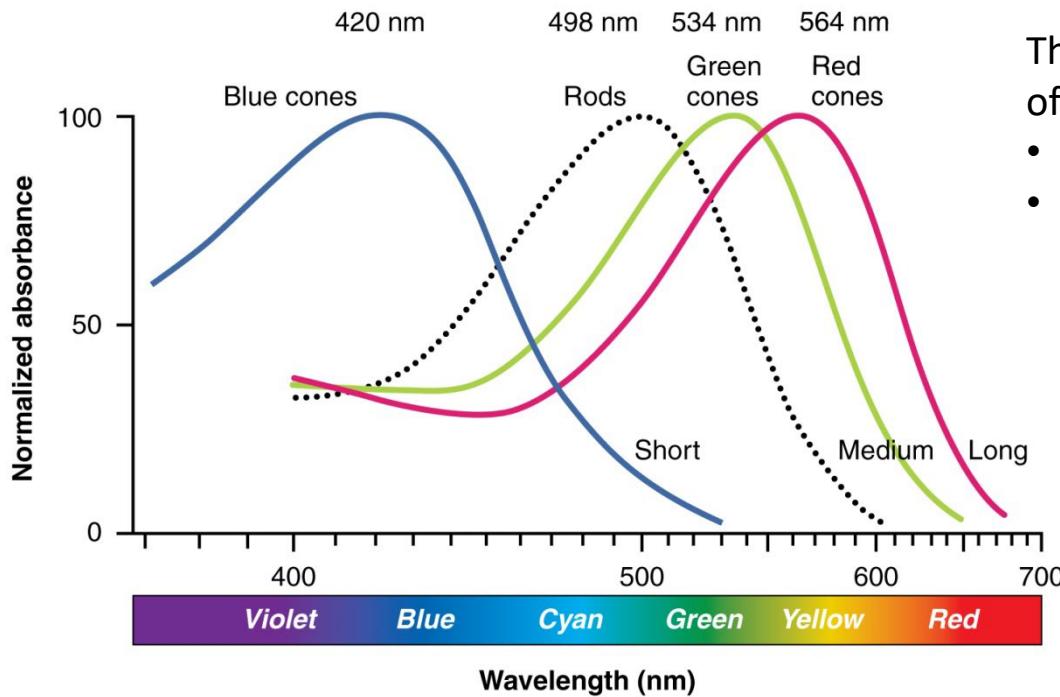


It is of interest to see the wide variety of ways this is conveyed in scientific diagrams:



Perception: color sensitivity

- Cells in the retina are differentially sensitive to colors of different wavelength
 - Each have a **distribution** of sensitivity for **short**, **medium** & **long**
 - Their **peaks** are used to name them as **Blue**, **Green**, **Red** or Rods



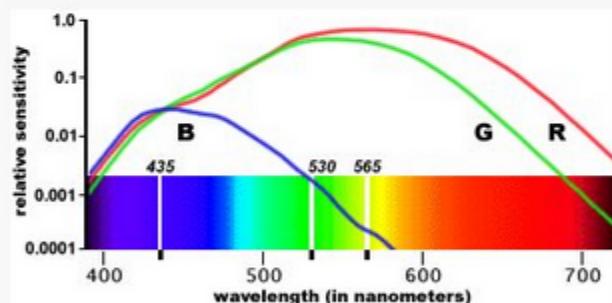
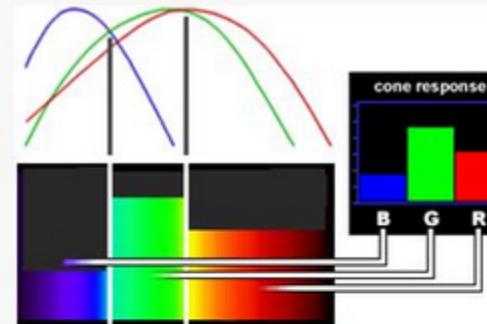
This figure also stimulates questions of scientific visualization

- Rods & cones are “normalized”
- Are they all equal in what we see?

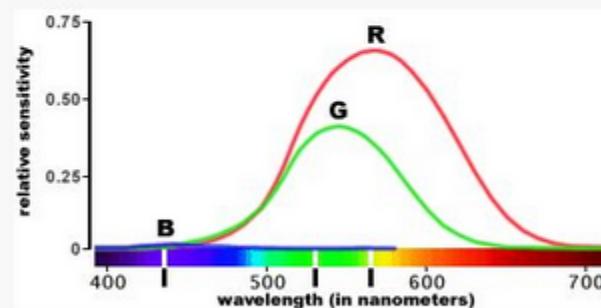
Perception: color sensitivity

Color sensitivity, shown on three different scales

- Cone receptors least sensitive to (least output for) to blue
- most sensitive to red



Relative sensitivity curves for the three types of cones, log vertical scale, cone spectral curves from Vos & Walraven, 1974



Relative sensitivity curves for the three types of cones, the Vos & Walraven curves on a normal vertical scale

from: <http://slideplayer.com/slide/6329532/>

Perception: Contrast

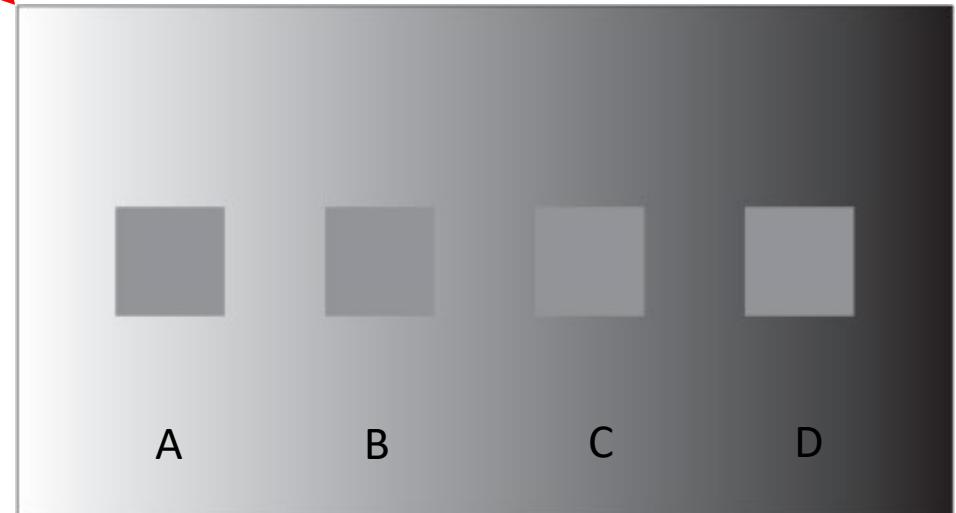
Color perception, even of gray, is influenced by
contrast against a background

Q: Which gray square at right is most similar to that at the left?

gray square



A: it is the **same** gray square against a changing background



Most people say **A**, because it is shown on a light background

Luminance contrast

Showing blue text on a black background doesn't work very well. There is insufficient luminance contrast.

Showing blue text on a white background works better. There is sufficient luminance contrast.

Showing yellow text on a white background doesn't work very well. There is insufficient luminance contrast.

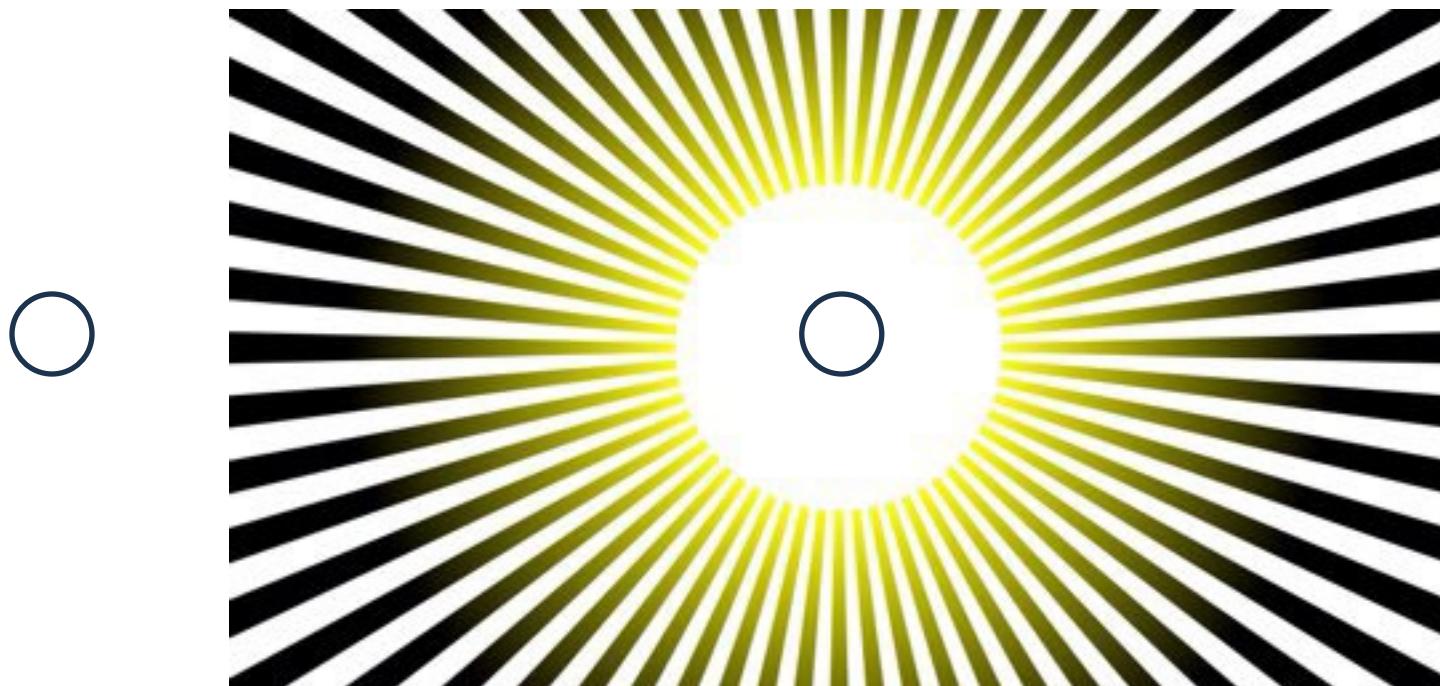
Showing yellow text on a black background works better. There is sufficient luminance contrast.

TIP: For presentations, light text on a dark background is often preferred.
I don't do this, because I'm also concerned with printing slides.
(With LaTeX Beamer, it is easy to have separate setups for presentation & print)

Brightness illusion

Is the white at the center the **same** brightness as the white at the edges?
Or, is it **brighter**?

They are the **same**. We interpret the center as a source of light relative to the surrounding bright yellow.



The illusion also affects pupil size! <https://www.pnas.org/content/109/6/2162>

Discovery of color

Feb 8, 1672: Isaac Newton reads his Optics paper to the Royal Society of London
“light is not homogeneous,... but rather consists of rays of different forms”



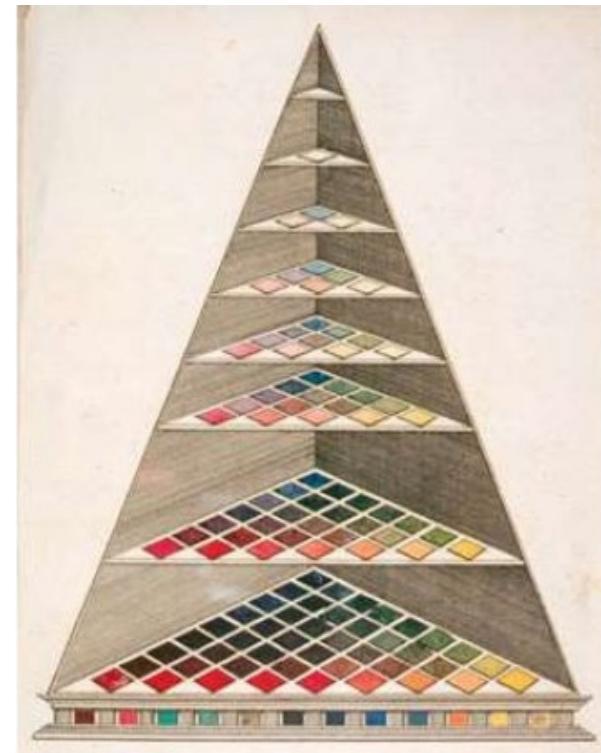
Early color theory

Tobias Mayer (1755) – color theory composed of (blue, red, yellow) as basic colors



Introduces the idea of color “primaries”

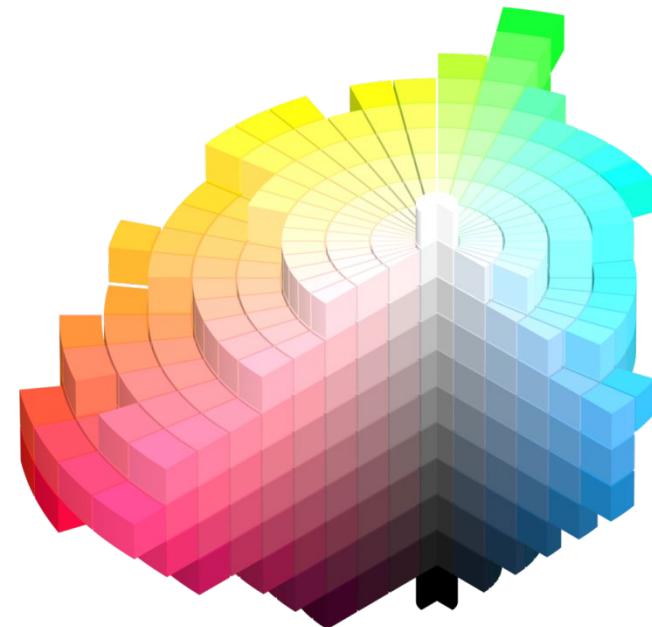
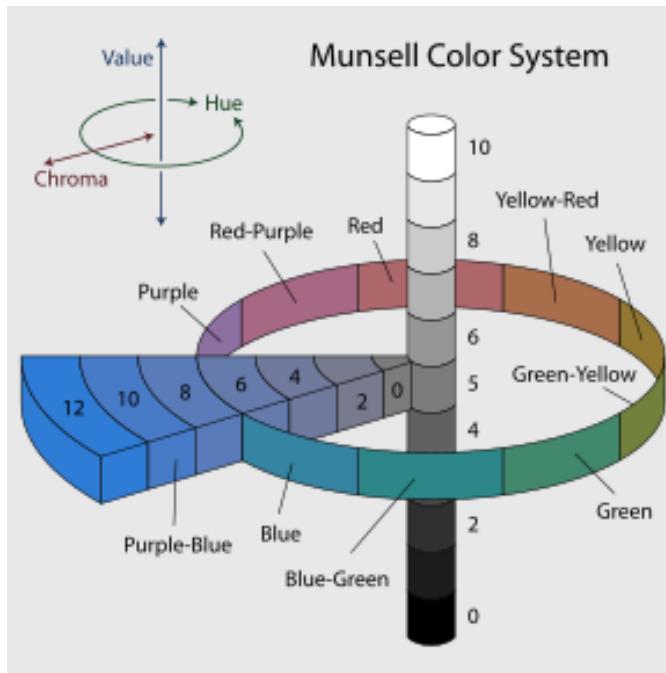
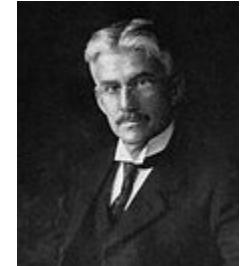
Johannes Lambert (1772) – A color pyramid, composed of 7 layers



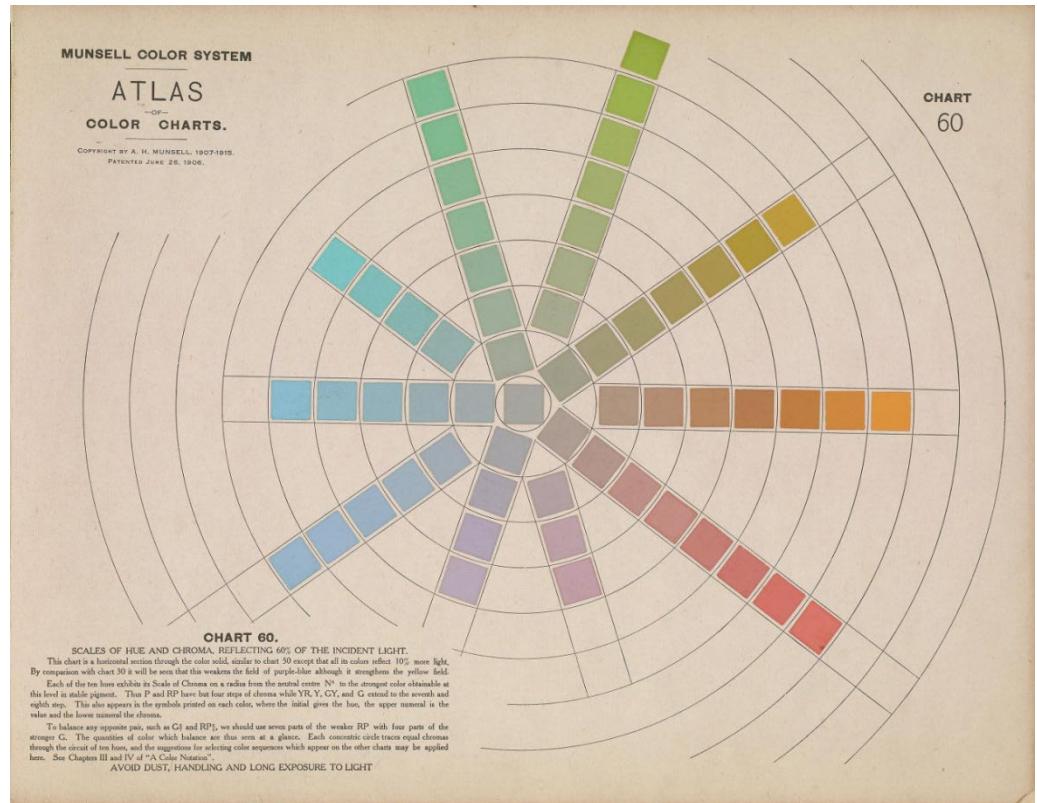
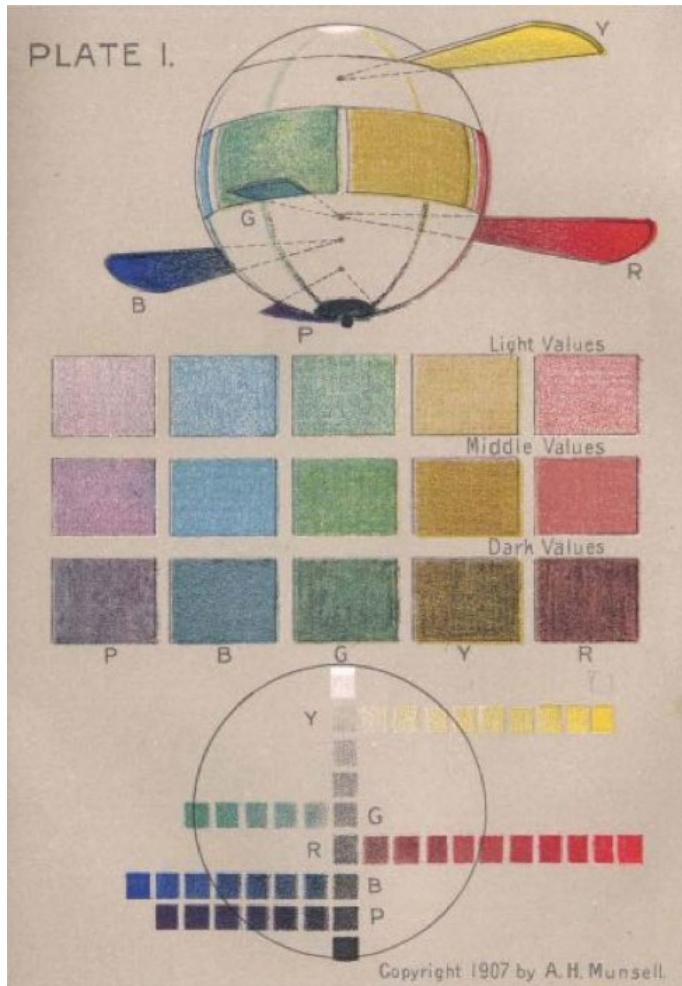
Introduces the idea of color saturation

Color space: Munsell colors

- Color space is 3D
 - How to specify a given color in **perceptual** terms?
 - Albert Munsell (~1930): **hue, chroma, lightness (HCL)**
 - These form **perceptually uniform & independent** dimensions



Munsell's color scheme was highly influential in Psychology research
 Nearly every lab investigating color used standard sets of Munsell color chips

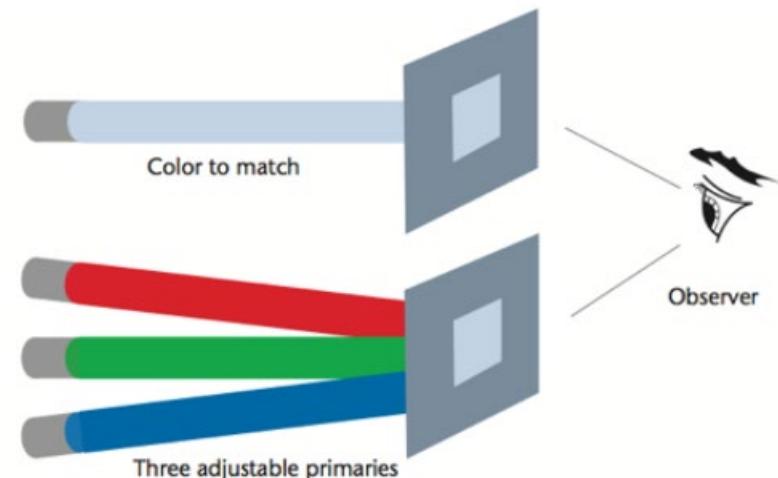


CIE color space

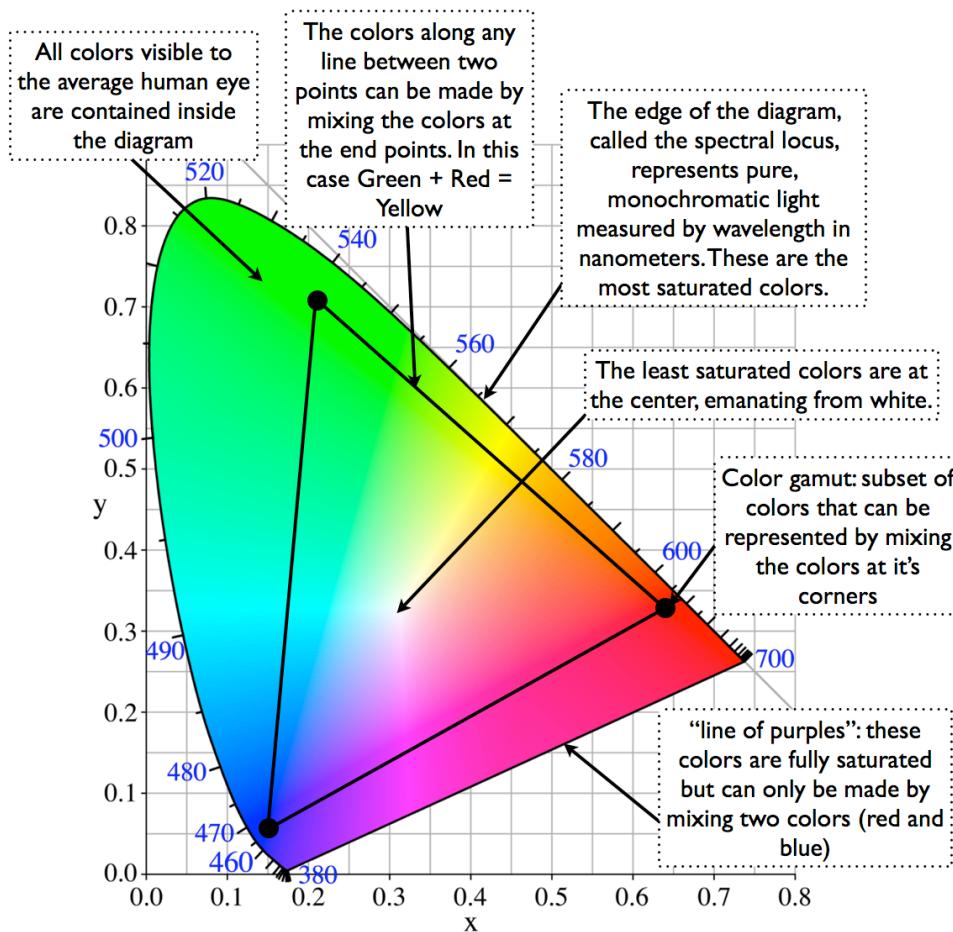
- How do we know about the **perceptual** properties of colors, taking spectral sensitivity into account?

Experiments used a **color-matching** task:

- Adjust the intensity of pure R, G, B lights to match a given color
- This defines a new color theory connecting **physical** properties and human **perception** (spectral sensitivity).
- The CIE (International Commission on Illumination) becomes the standard to calibrate color in scientific instruments and human experiments



CIE color space



Anatomy of a CIE Chromaticity Diagram

The International Commission on Illumination (CIE) in 1931 defines a color space of (x,y,z) coordinates based on color-matching experiments combining R, G, B light sources in additive mixtures, and a "standard colorimetric observer"

This defines a new color theory connecting **physical** properties and human **perception** (spectral sensitivity).

There are eventually a variety of CIE color spaces (CIELab, CIELuv, ...) and lots of formulas for converting among them.

Color space: RGB & CMYK

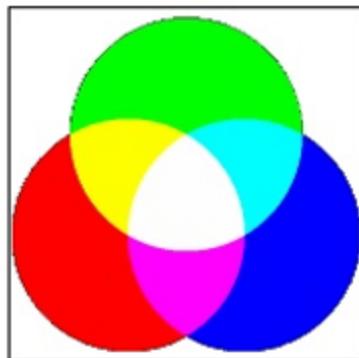
Enter technology: how to produce color?

- RGB:
 - Combine **light**: R + G + B = white
 - Used in computer monitors, TV, film
- CMYK:
 - Combine **ink**: Cyan + Magenta + Yellow = Black
 - Used in color laser printers, the print industry



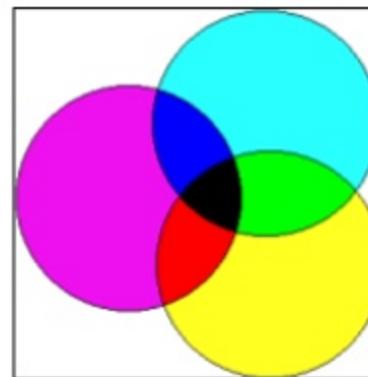
Caution: R,
SAS, SPSS
use RGB by
default

Additive colour system



Mixture of primary light colours-
White

Subtractive Colour System



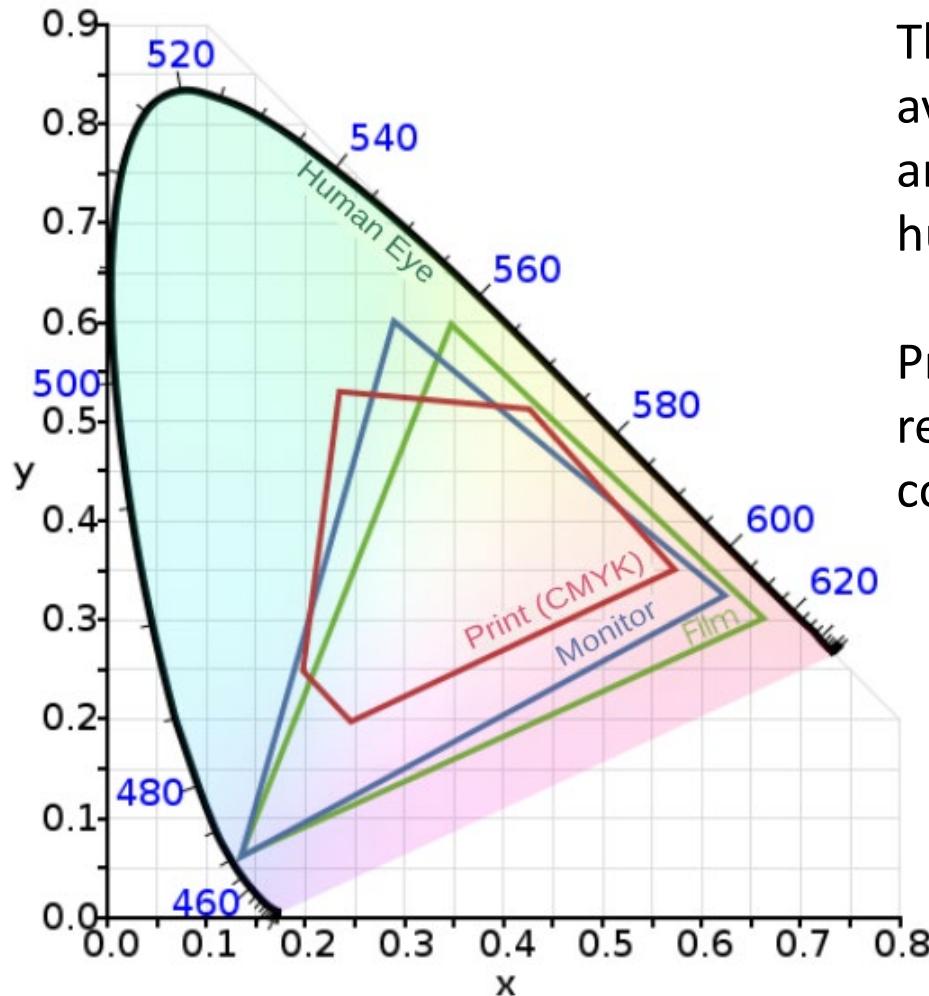
Mixture of primary pigment colours
Black

TIP: for publishing, you may need to convert graphics from RGB to CMYK.

Some software offer useful tools for this:

- Adobe Acrobat Pro
- ImageMagik

Color space: RGB & CMYK



The standard gamut of colors available for different **display media** are a restricted subset of what the human eye can see.

Print (CMYK) is most restricted, and requires a more careful choice of color in graphics



Always check the display on different media.

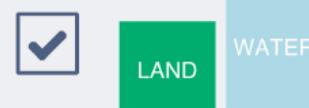
Color in DataViz Design

There are several commonsense rules & guidelines for use of color in statistical graphics, maps & info vis

RULES

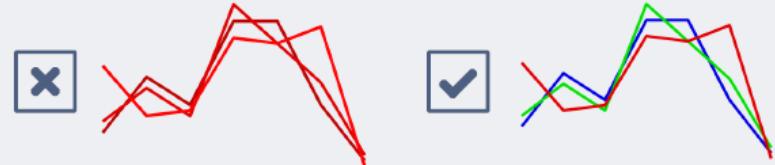
INTUITIVENESS

Use intuitive colors. When choosing them, consider what associations do they evoke.
If possible, use colors that audience will associate with your data anyway.



CLARITY

Use colors to make the data easier to read. Make sure your audience will be able to distinguish between the items shown in the visualization.



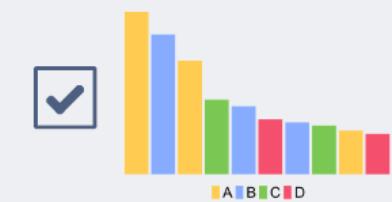
MODERATION

Use colors in moderation. For a simple dataset, a single color is preferable.
Use color as a strategic tool to highlight the important parts of your visual.



CLASSIFICATION

Don't use a gradient color palette for categories.
And the other way round - different colors for same measurement.



Software: Color specification

- Color is often hard to use effectively in software, because the ways to specify it are so varied:
 - **Color names:** “black”, “red”, “green3”, “skyblue”, “cyan”
 - **RGB:** black=(0,0,0); green3=(0, 205, 0), cyan=(0, 255, 255)
 - **Hex:** black="#000000"; cyan="#00FFFF"

18	beige	#F5F5DC	245	245	220
19	bisque	#FFE4C4	255	228	196
20	bisque1	#FFE4C4	255	228	196
21	bisque2	#EED5B7	238	213	183
22	bisque3	#CDB79E	205	193	158
23	bisque4	#BB7D6B	139	125	107
24	black	#000000	0	0	0
25	blanchedalmond	#FFEBBC	255	235	205

68	cyan	#00FFFF	0	255	255
69	cyan1	#00FFFF	0	255	255
70	cyan2	#00EEEE	0	238	238
71	cyan3	#00CDCD	0	205	205
72	cyan4	#008B8B	0	139	139
73	darkblue	#00008B	0	0	139
74	darkcyan	#008B8B	0	139	139
75	darkgoldenrod	#B8860B	184	134	11

26	blue	#0000FF	0	0	255
27	blue1	#0000FF	0	0	255
28	blue2	#0000EE	0	0	238
29	blue3	#0000CD	0	0	205
30	blue4	#00008B	0	0	139
31	blueviolet	#8A2BE2	138	43	226
32	brown	#A52A2A	165	42	42

76	darkgoldenrod1	#FFB90F	255	195	15
77	darkgoldenrod2	#E6A02E	238	173	14
78	darkgoldenrod3	#CD950C	205	149	12
79	darkgoldenrod4	#BB650B	139	101	9
80	darkgray	#A9A9A9	169	169	169
81	darkgreen	#006400	0	100	0
82	darkgrey	#A9A9A9	169	169	169

See: <http://research.stowers.org/mcm/efg/R/Color/Chart/> for R color charts

Software: Color specification

WTF! Give me a break, please:

- Make it easier to **compute** with colors: define blends of colors or a color ramp
- Make it easier to specify color **schemes** with decent **perceptual** properties
- Make it easier to map colors to **data features** I want to show



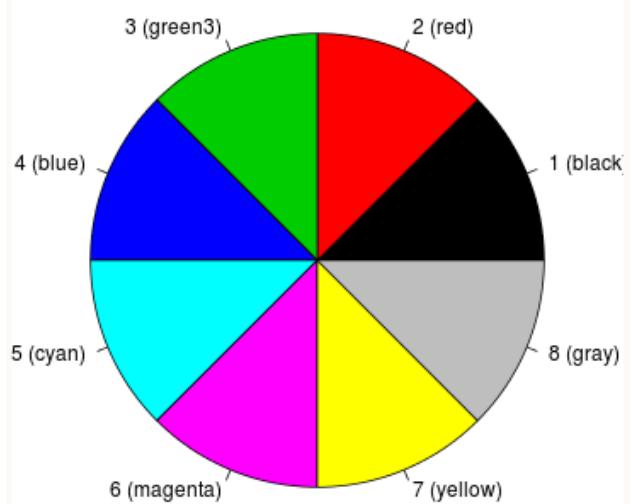
*Every time you are
forced to say
"#008B8B" or "cyan4"
a puppy dies
somewhere*

-- MF, 2018

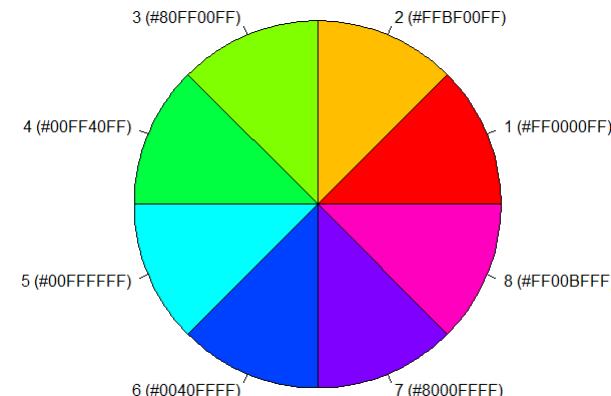
Software: palettes

- R (and other software) provide palettes of colors used for **defaults** in graphs
 - Not all are nice— depends on your purpose
 - There are lot of choices – maybe too many!
 - You can change them **once** for all graphs in a session or paper

```
> (pal <- palette())
[1] "black"  "red"    "green3" "blue"   "cyan"   "magenta" "yellow" "gray"
> pie(rep(1, length(pal)), labels = sprintf("%d (%s)", seq_along(pal), pal), col = pal)
```



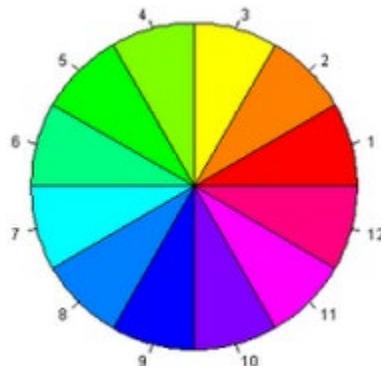
palette(rainbow(8)); pie(...)



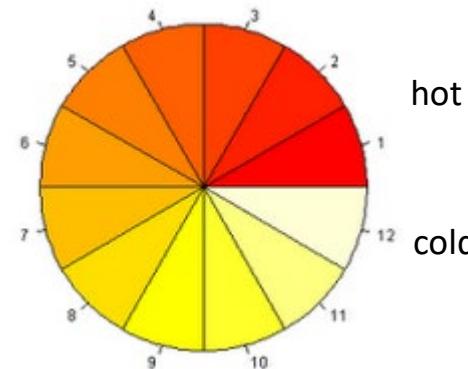
R: basic palettes

`n <- 12`

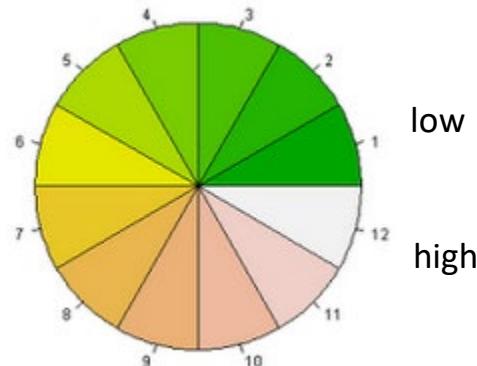
`pie(rep(1, n), col=rainbow(n))`



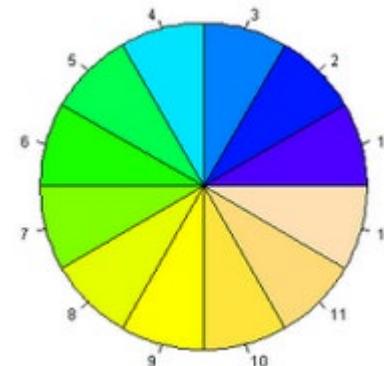
`pie(rep(1, n), col=heat.colors(n))`



`pie(rep(1, n), col=terrain.colors(n))`

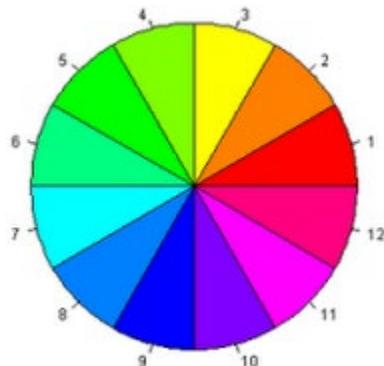


`pie(rep(1, n), col=topo.colors(n))`

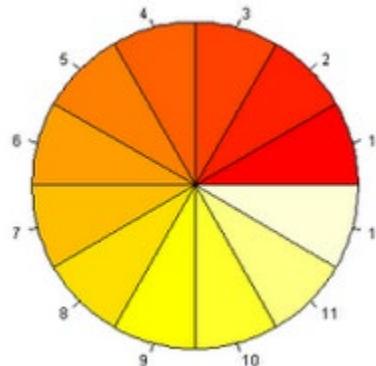


R: basic palettes

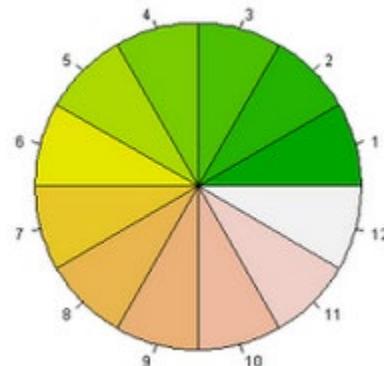
rainbow



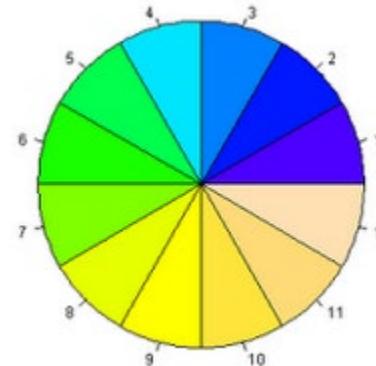
heat



terrain



topo



Discussion Q:

- Which of these seem better for **quantitative** variables?
- Which for **categorical**?

These are shown for **area** fill. How effective would they be for:

- **point** colors
- **line** colors

E.g., **yellow** is bright as an area, but nearly invisible as points (●) or lines (→) or **text on a white background**

palettes: ColorBrewer

ColorBrewer, by Cynthia Brewer provides an interactive application for choosing color palettes, <http://colorbrewer2.org>

This is one example of a **multi-hue** scheme for a **quantitative, sequential** variable, shown from low to high with 4 color classes

variable type

choose different versions of the scheme

export color specs to HEX, RGB, CMYK

Number of data classes: 4

Nature of your data: sequential

Pick a color scheme: Multi-hue: Single hue:

Only show: colorblind safe, print friendly, photocopy safe

Context: roads, cities, borders

Background: solid color, terrain

Background transparency

4-class BuGn

EXPORT

HEX

#edf8fb
#b2e2e2
#66c2a4
#238b45

COLORBREWER 2.0
color advice for cartography

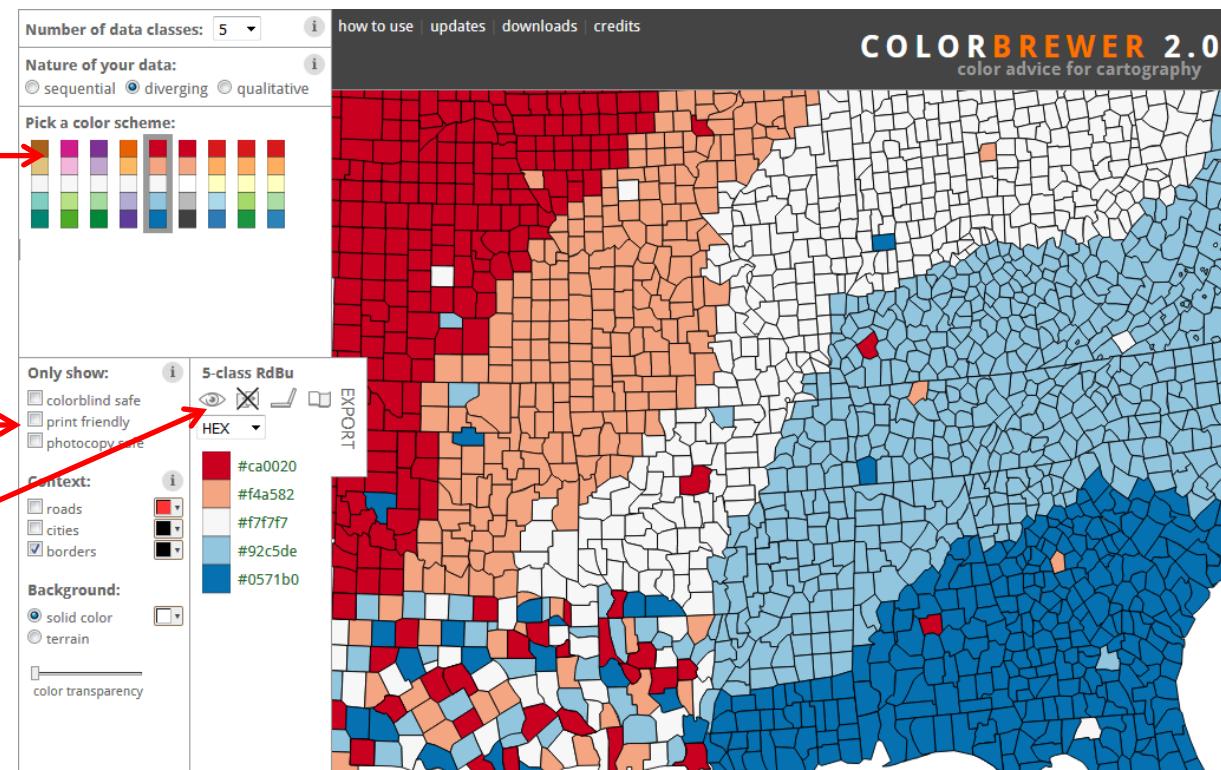
This example: <http://colorbrewer2.org/#type=sequential&scheme=BuGn&n=4>

palettes: ColorBrewer

Diverging schemes are designed to show a quantitative variable, where we want to see what is low vs. what is high, leaving the middle of less visual impact – difference from average, residuals, ...

there are different schemes within this rubric

there are tools to filter for colorblind, print & B/W
Warnings when not friendly



This example: <http://colorbrewer2.org/#type=diverging&scheme=RdBu&n=5>

palettes: ColorBrewer

Qualitative schemes are designed to show a categorical variable, where we want to see differences among unordered categories

choose # classes



The screenshot shows the ColorBrewer 2.0 interface. On the left, there's a sidebar with settings: 'Number of data classes' set to 5, 'Nature of your data' set to 'qualitative', and a 'Pick a color scheme' section showing a grid of color swatches. Below that are sections for 'Only show:', 'Context:' (with 'borders' checked), and 'Background:' (with 'solid color' selected). A color palette on the right shows the '5-class Accent' scheme with hex codes: 127,201,127; 190,174,212; 253,192,134; 255,255,153; and 56,108,176. The main area is a map of the United States where each state is colored according to its category.

various schemes



see other context



add transparency



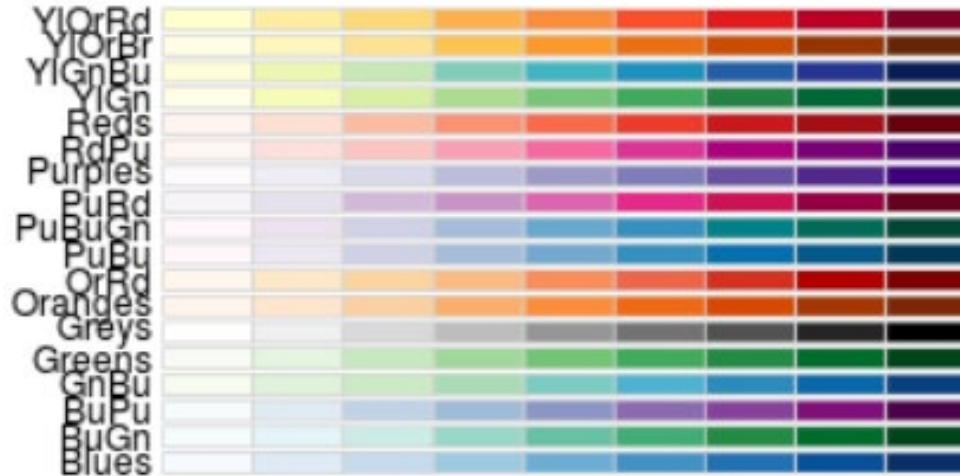
These are all available in the RColorBrewer package

This example: <http://colorbrewer2.org/#type=qualitative&scheme=Accent&n=5>

palettes: RColorBrewer

```
RColorBrewer::display.brewer.all()
```

sequential



qualitative



diverging



R: choose_palette()

The colorspace package in R has an interactive palette widget.

It also provides functions for many kinds of color manipulations.

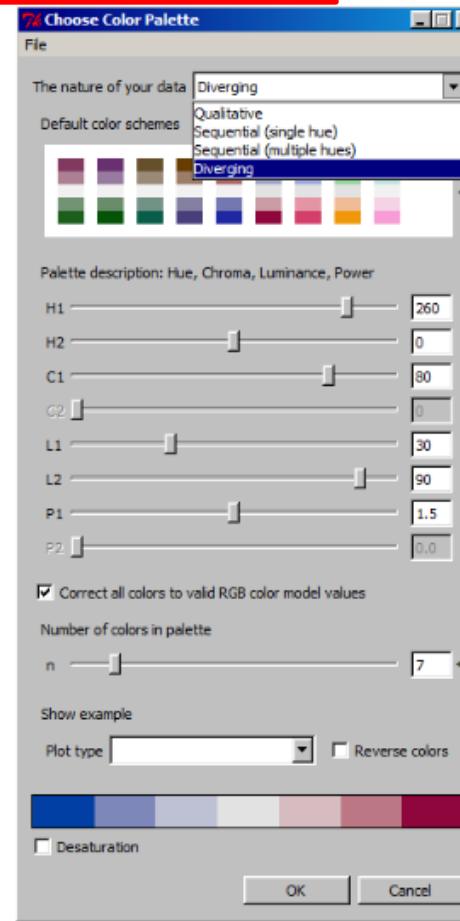
The R Color cheatsheet, by Malcolm Fraser is a goto source for all aspects of color in R:

<https://www.nceas.ucsb.edu/~frazier/RSpatialGuides/colorPaletteCheatsheet.pdf>

R color cheatsheet

Overview of colorspace palette selector

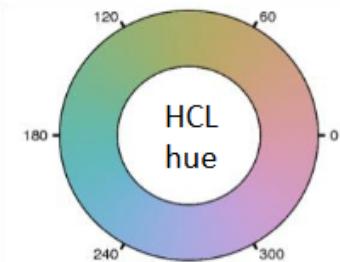
```
library("colorspace")
pal <- choose_palette()
```



Select the type of color scheme based on the type of data

Default color schemes – can be used “as is” or as a starting point for modification

Interactively select:
• hue: color
• chroma: low chroma = gray
• luminance: high luminance = pastel
• power: how the color changes along a gradient



Select # of colors in palette

Save palette for future R sessions:
• txt file with hex codes
• .R file with a function describing how to generate the palette.
`source` can be used to import the

Viridis palettes

Designed by Stéfan van der Walt and Nathaniel Smith for Python;
ported to R in the [viridis](#) package.

Goals:

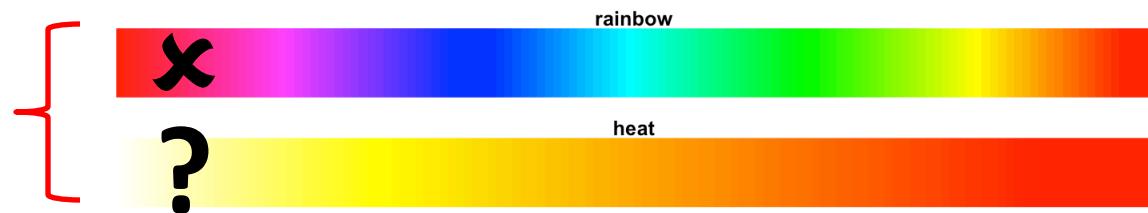
- **Colorful**, spanning as wide a palette as possible so as to make differences easy to see
- **Perceptually uniform**: values close to each other have similar-appearing colors and values far away from each other have more different-appearing colors
- **Robust to colorblindness**: these properties hold true for people with common forms of colorblindness, as well as in grey scale printing
- **Pretty**: much nicer as a defaults in software

These assertions are largely **untested**. Perhaps a good research topic!

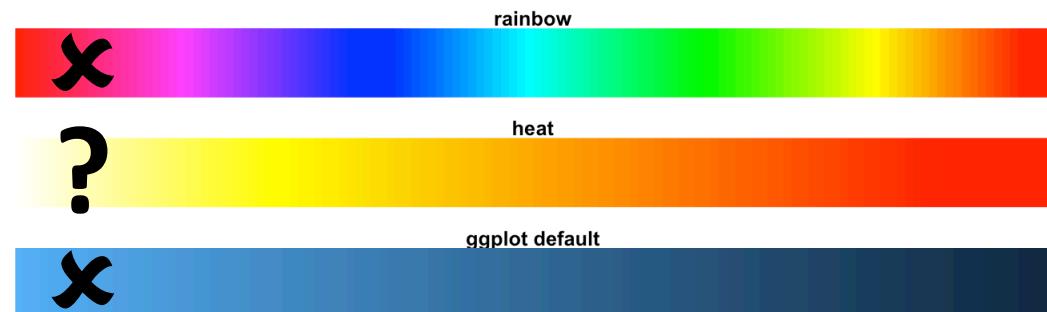
Comparing quantitative palettes

For a **quantitative** variable and a **continuous** color scale, there are many choices.
How well do they work?

R base palettes



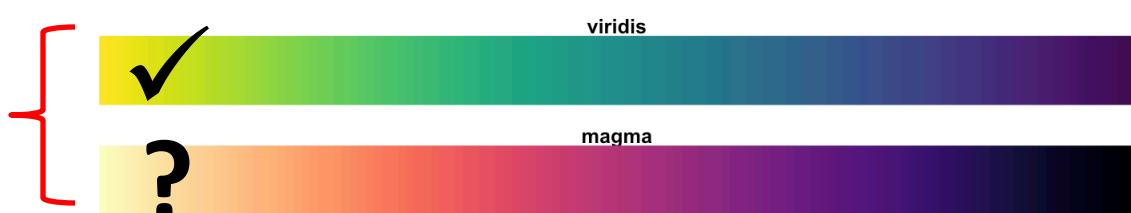
ggplot default palette



ColorBrewer palettes



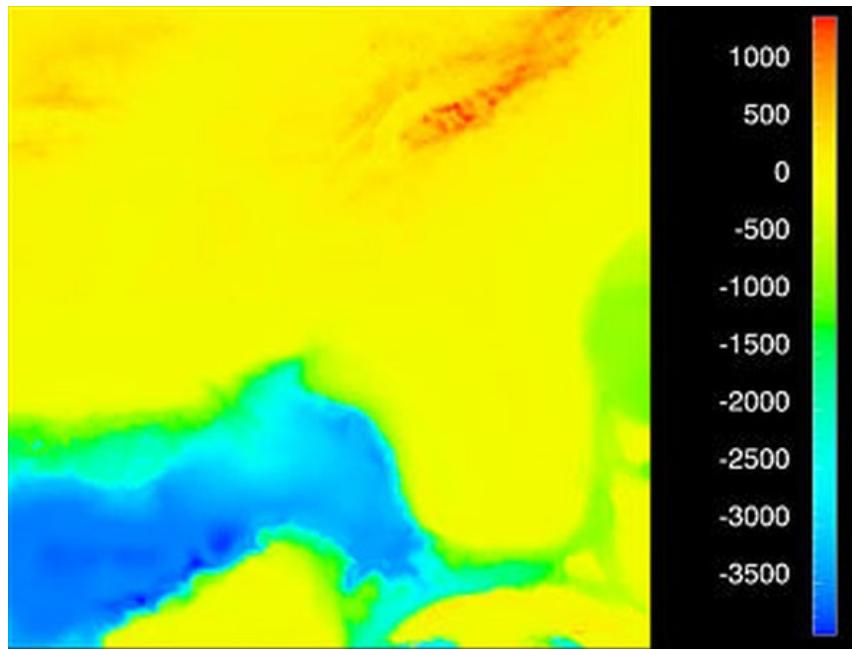
viridis palettes



This is a bit tricky: ideally, we want a **wide range** of color

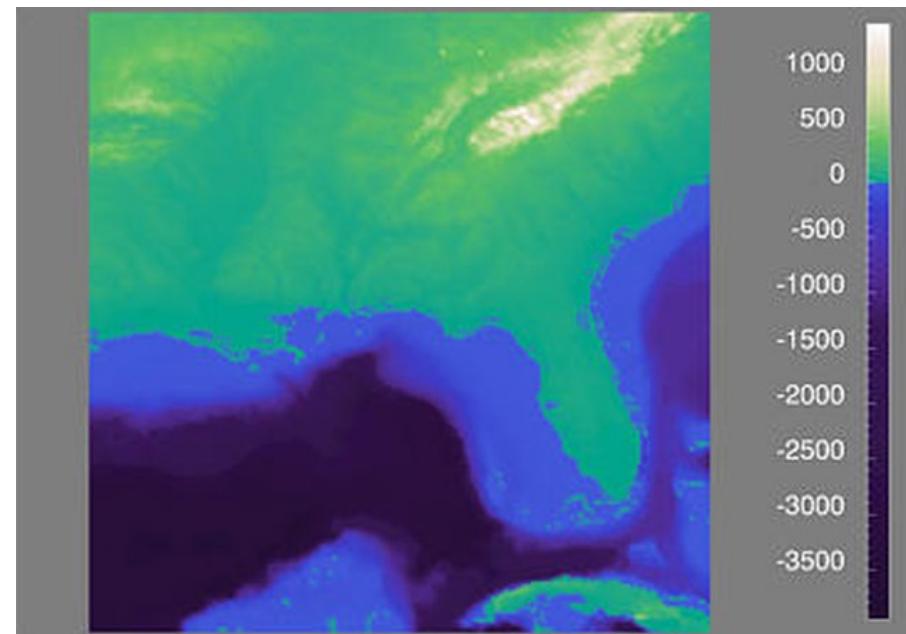
Comparing palettes

What is shown in this map?



The rainbow color scale obscures the main features

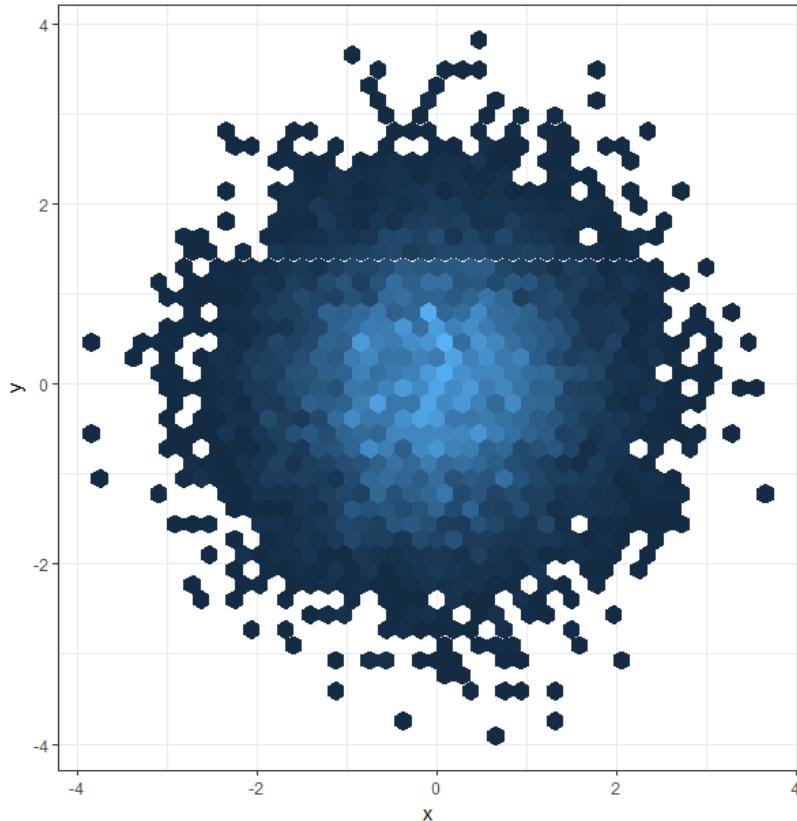
Now we can see it—elevation in the Florida coast: above or below 0



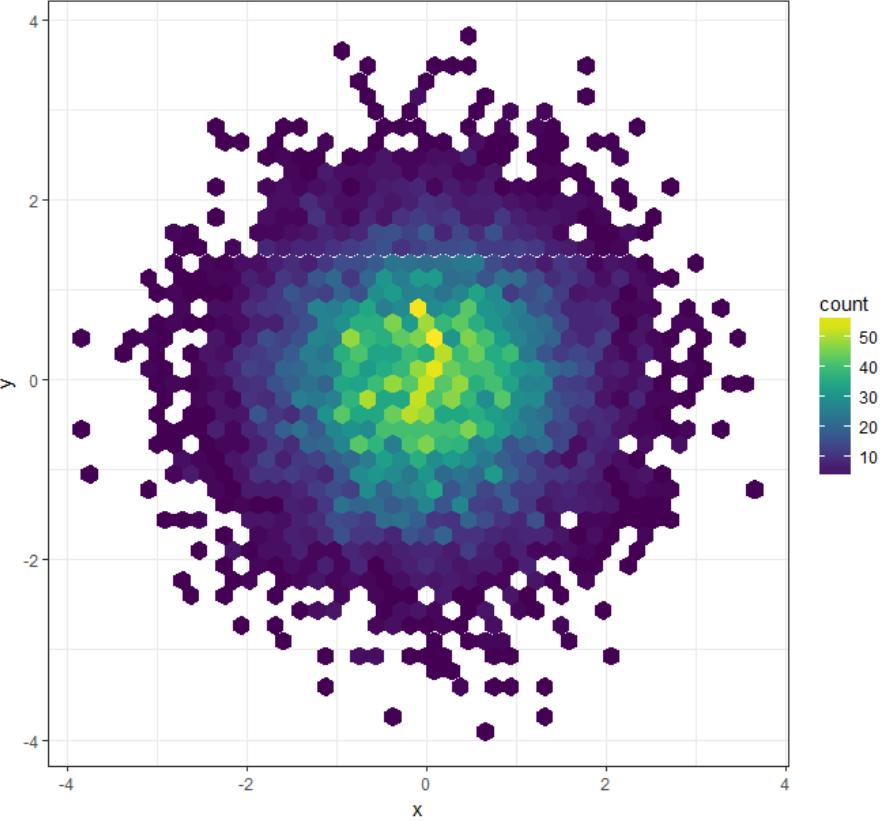
This color scheme was designed to reveal the essential topography of the map & to have perceptually equal elevation steps

Comparing palettes

ggplot default palette



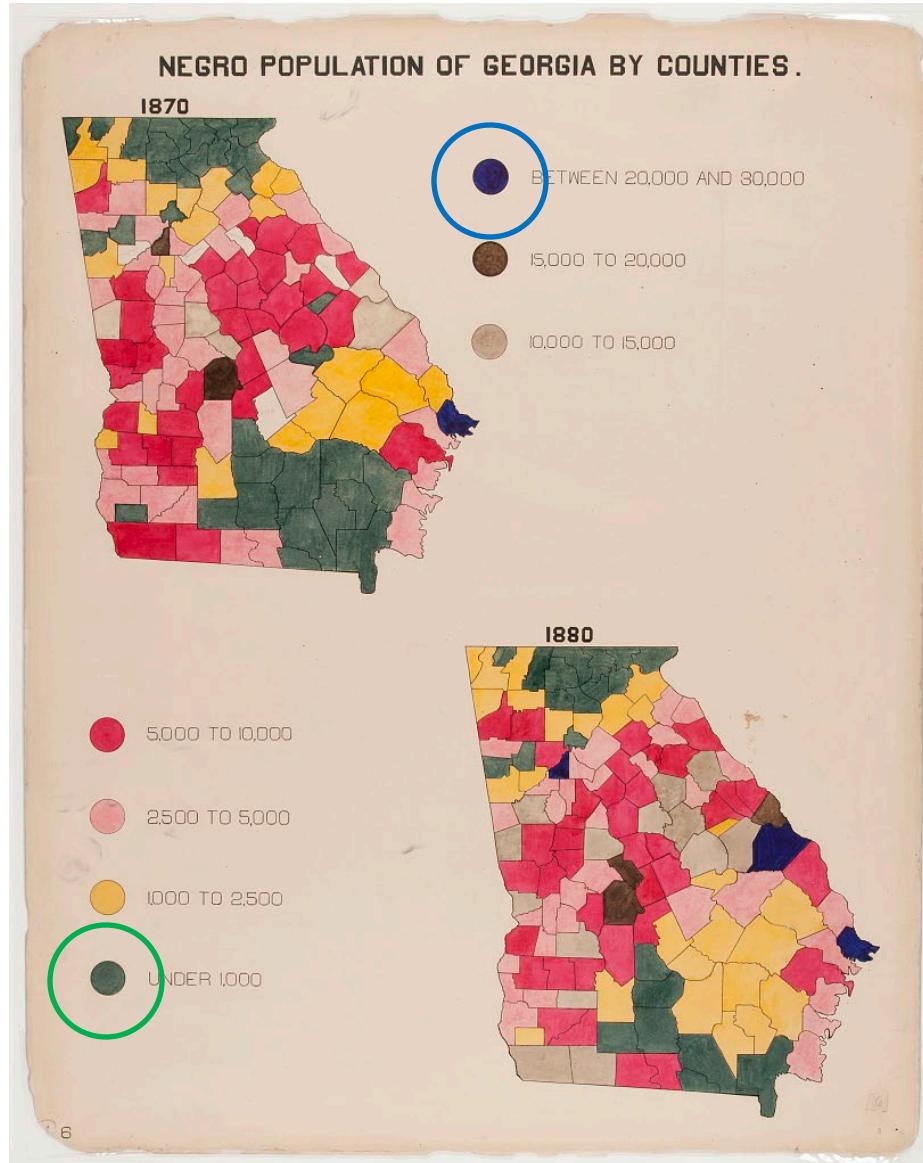
viridis default palette



```
df <- data.frame(x = rnorm(10000), y = rnorm(10000))
g <- ggplot(df, aes(x = x, y = y)) +
  geom_hex(bins=40) + coord_fixed() + theme_bw()
g
```

```
library(viridis)
g + scale_fill_viridis()
```

WEB Du Bois' sense of color



Goal: Show Negro population of counties in Georgia from 1870 to 1880 & change

Which counties had largest Negro pop?

Which had lowest?

Where was the change greatest?
(HARD: need to plot the diff^{ce})

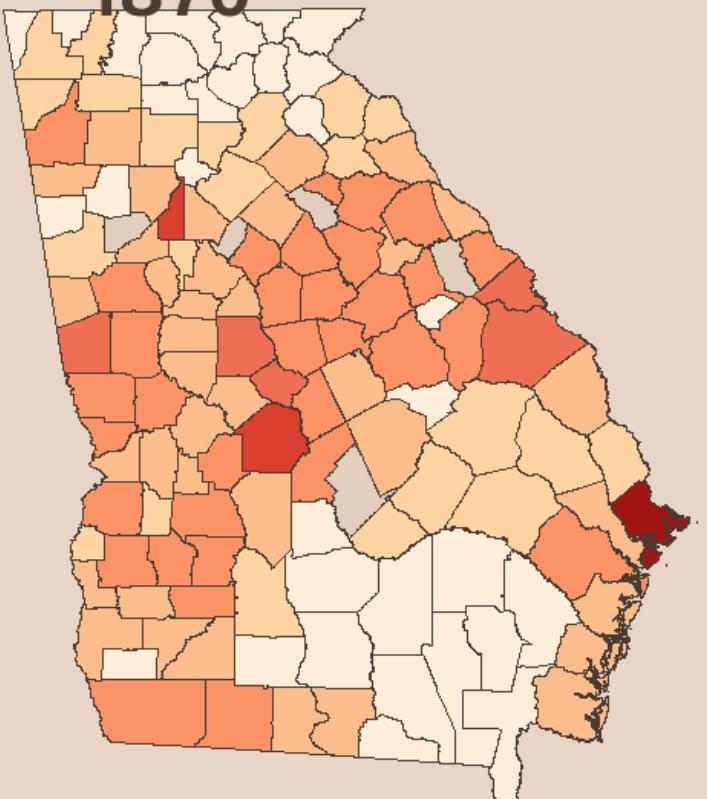
RColorBrewer to the rescue

```
library(RColorBrewer)
colors <- brewer.pal(n = 7, name = "OrRd")
colors <- c('#fef0d9', '#fdd49e', '#fdbb84', '#fc8d59',
           '#ef6548', '#d7301f', '#990000')
```

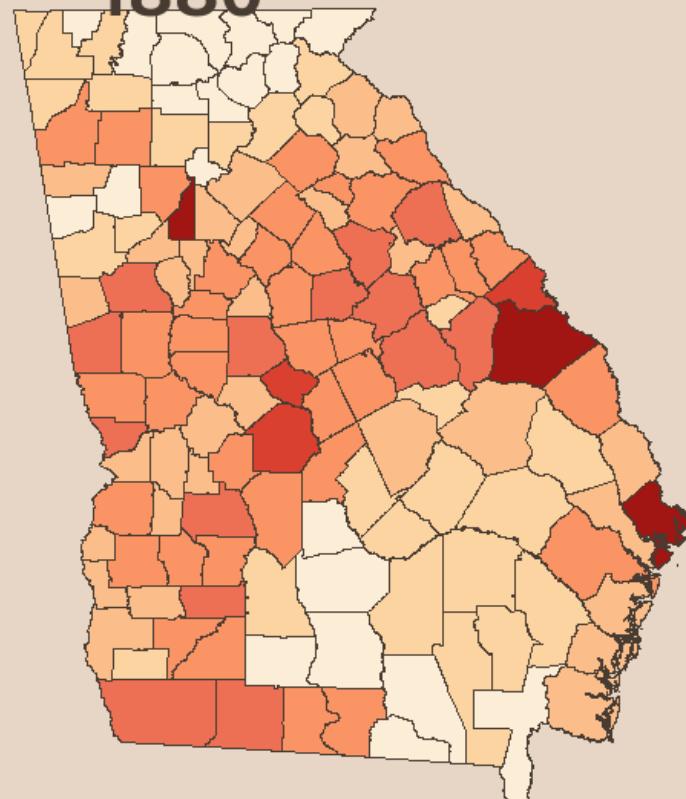
OrRd (sequential)



1870

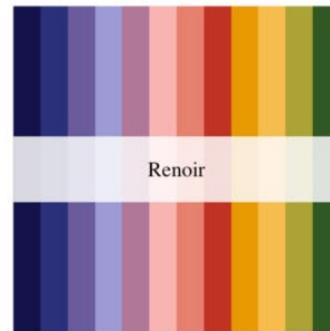


1880



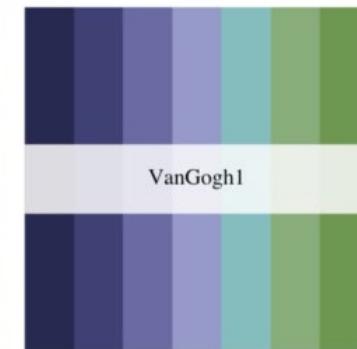
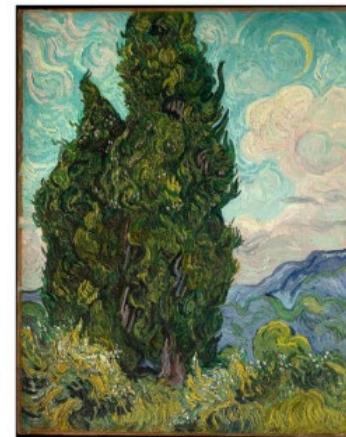
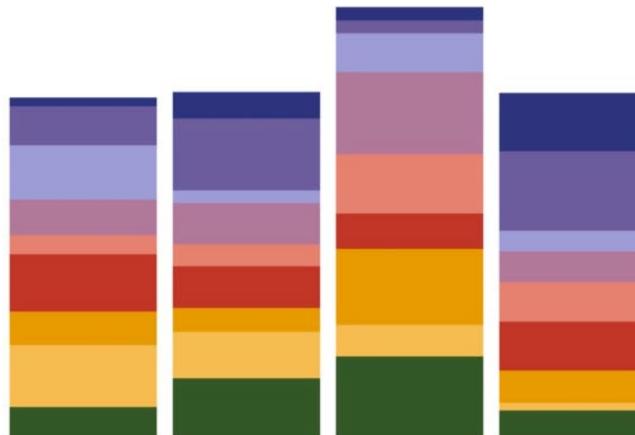
Metbrewer palettes

Artistic palettes inspired by works at the Metropolitan Museum of Art in New York



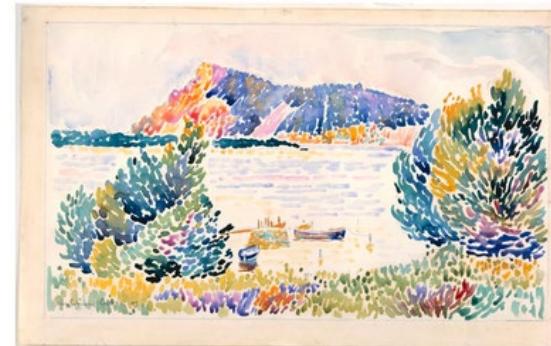
Renoir

Nini in the Garden



Cypresses, 1889, Vincent van Gogh

Cap Nègre, 1909, Henri-Edmond Cross

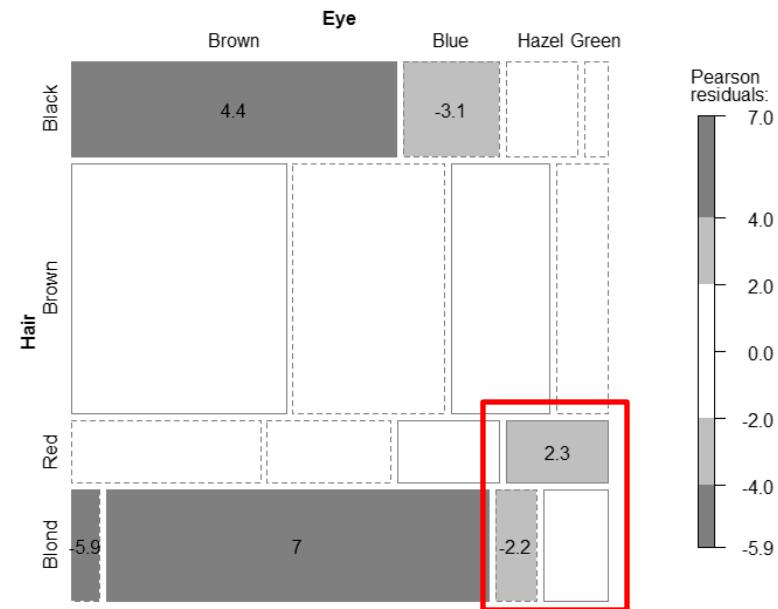
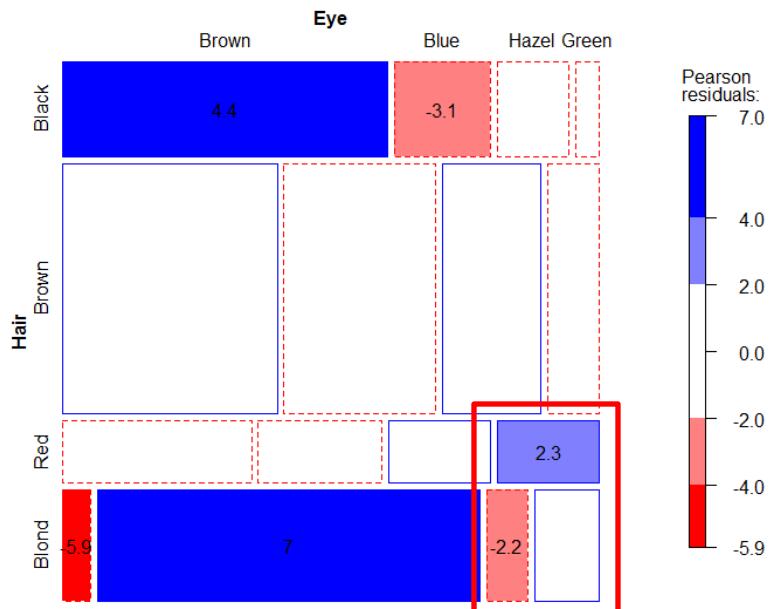


Color → B/W ?

Graphics designed in color often must consider what happens when graphs are reproduced in B/W: grayscale

- This is particularly hard for a **diverging** color scale
- My original design for mosaic plots used solid vs. dashed lines to distinguish + vs. -

```
mosaic(haireye, labeling=labeling_residuals, gp=shading_Friendly)
```



Color → B/W ?

The design of this graphic table was crafted to preserve readability if printed in B/W.
 NB: text for numbers changes from black to white depending on background color.

Figure 9: Section 37 benefits by type (1998–2015)

	1998– 2002	2003– 2005	2006– 2009	2010– 2013	2014– 2016	Scale
Roads, streetscapes	30	35	54	83	15	0 - 10
Culture, community, recreation	26	50	59	47	16	11 - 20
Parks	27	41	41	52	20	21 - 30
Affordable housing	17	26	38	56	11	31 - 40
Public art	26	25	41	32	4	41 - 50
Heritage	16	13	26	18	3	51 - 60
Transit	11	7	10	20	3	61 - 70
Libraries	6	2	5	11	1	71 - 80
Other	3	6	7	8	3	81 - 90

Figure 9: Section 37 benefits by type (1998–2015)

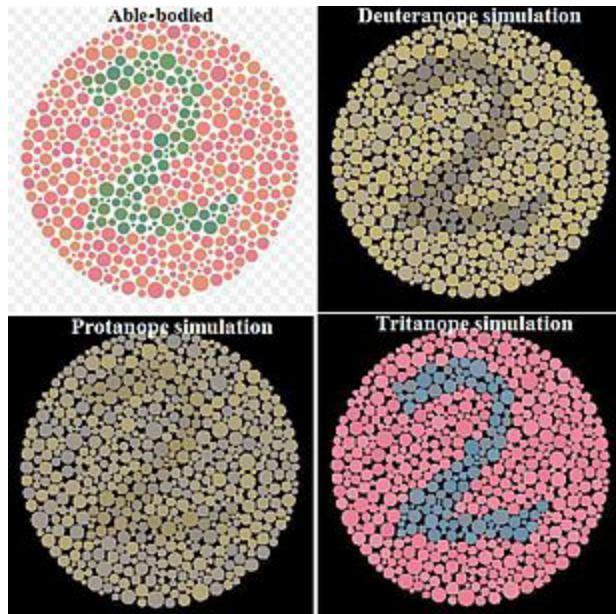
	1998– 2002	2003– 2005	2006– 2009	2010– 2013	2014– 2016	Scale
Roads, streetscapes	30	35	54	83	15	0 - 10
Culture, community, recreation	26	50	59	47	16	11 - 20
Parks	27	41	41	52	20	21 - 30
Affordable housing	17	26	38	56	11	31 - 40
Public art	26	25	41	32	4	41 - 50
Heritage	16	13	26	18	3	51 - 60
Transit	11	7	10	20	3	61 - 70
Libraries	6	2	5	11	1	71 - 80
Other	3	6	7	8	3	81 - 90

Background shading works equally well in color or B/W
 A+ for visual design!

Source: Friendly, A. R. (2017). *Land Value Capture and Social Benefits: Toronto and São Paulo Compared*. IMFG Papers on Municipal Finance and Governance, No 33, University of Toronto, <https://munkschool.utoronto.ca/imfg/>

Colorblindness

Most common forms are genetic, and involve a deficiency in one of the cone type sensitivities



- Protanopia (**red** deficient)
- Deutanopia (**green** deficient)
- Tritanopia (**blue** deficient)

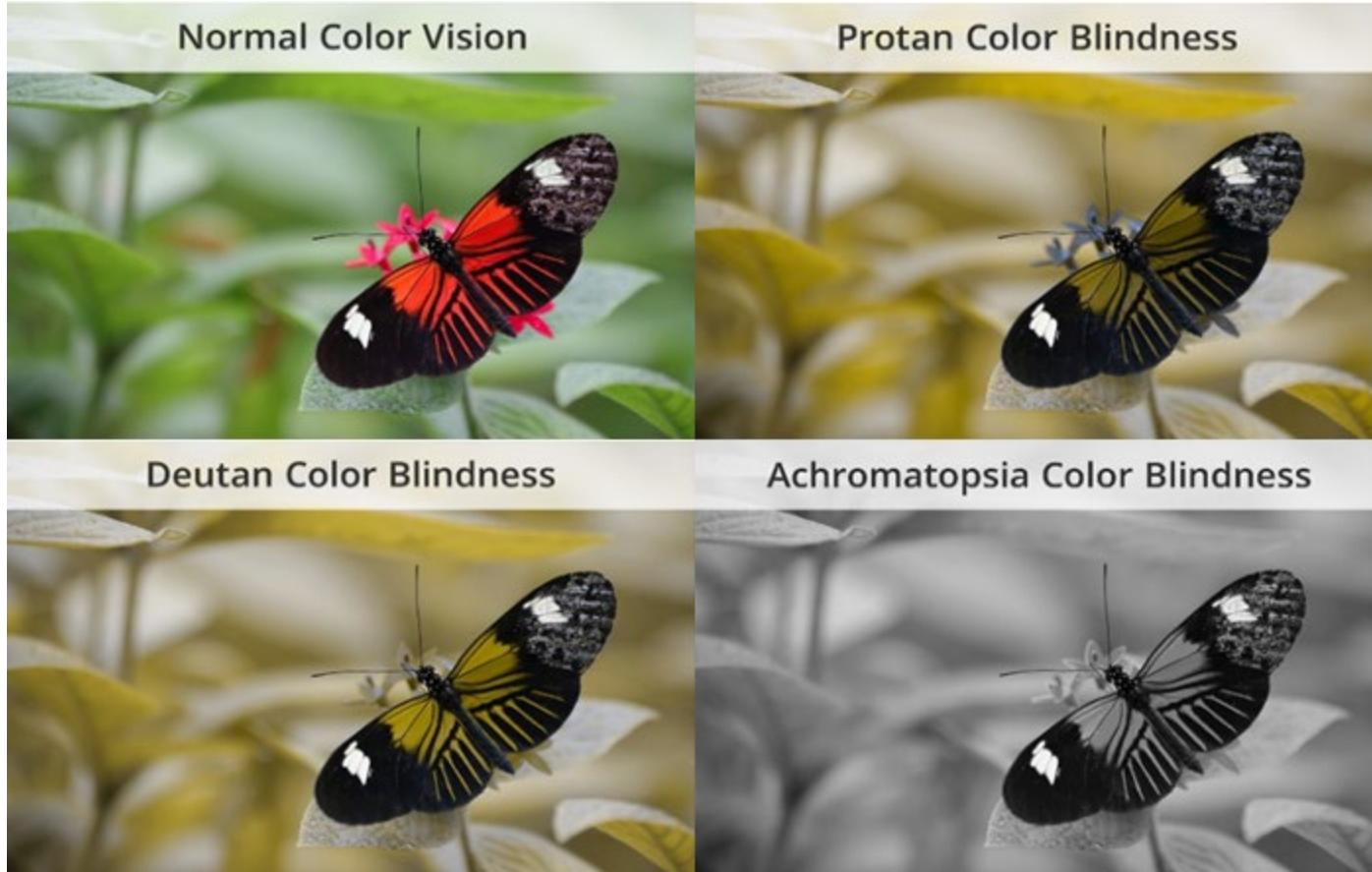
Some form of **red-green** insensitivity is most common

- about 6-8% of population
- more common in males

TIP: Avoid color scales with main variation between **red** & **green**

Colorblindness

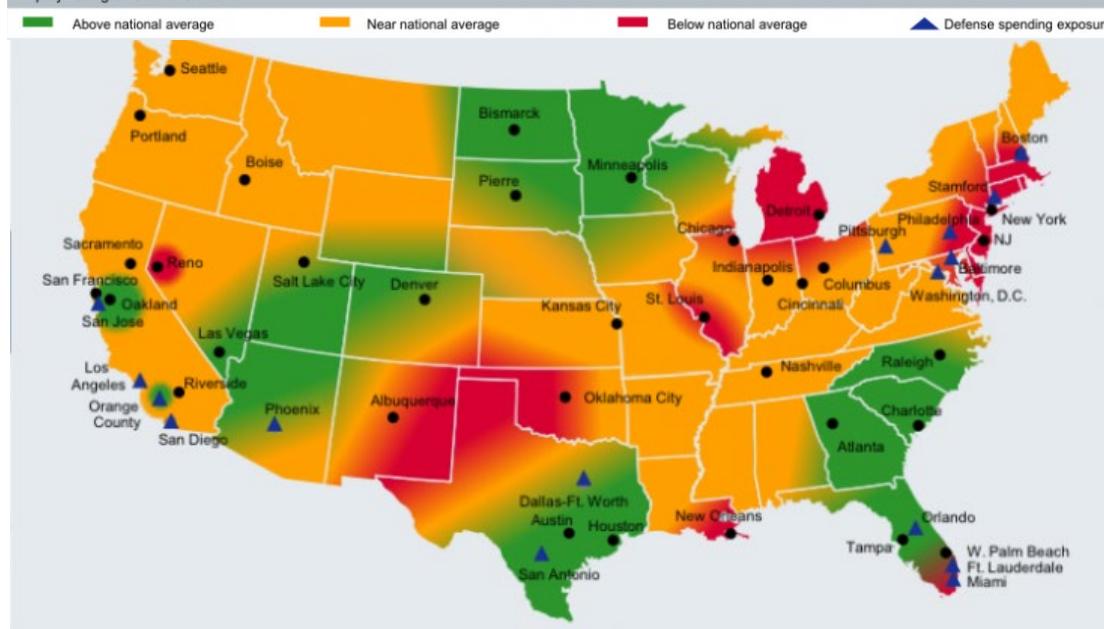
What an image looks like with various forms of color deficiency



Red-green colorblindness:

-R (protan) \approx -G (deutan)

Employment growth: 2013 - 2015

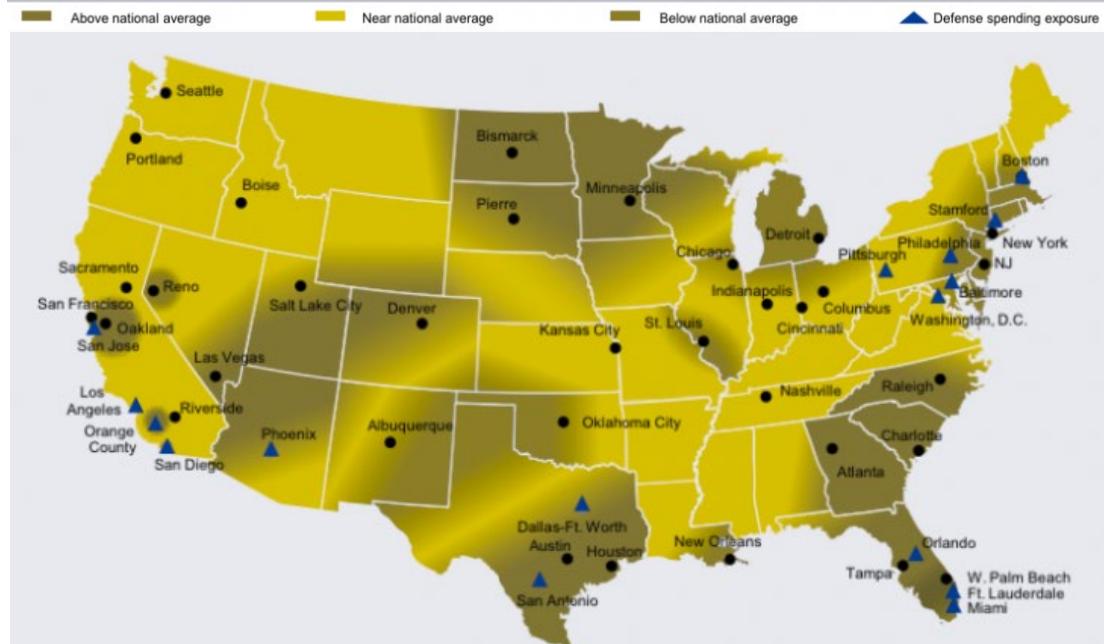


Goal: Show employment growth, 2013–2015

Original design, using

- green: above average
- red: below average

Employment growth: 2013 - 2015



How this looks to
someone with red-green
colorblindness

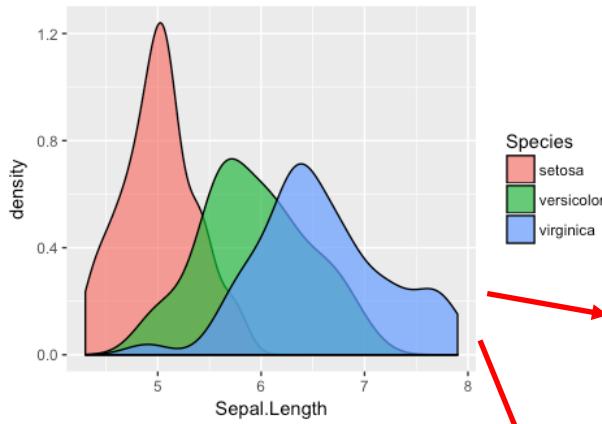
red & green become
indistinguishable

From: <http://www.mena-forum.com/category/u-s-a/>



colorblindr package

myfig

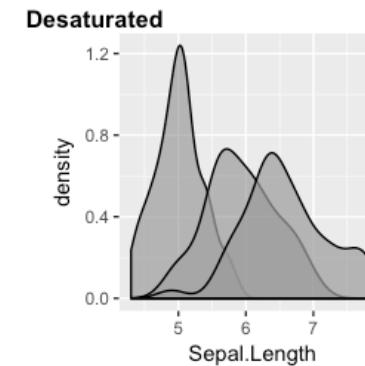
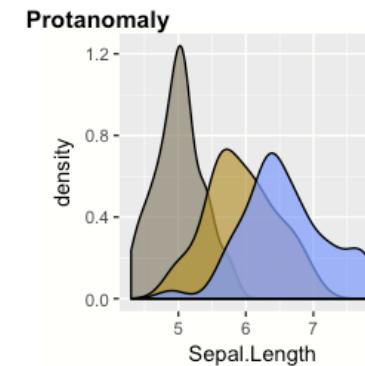
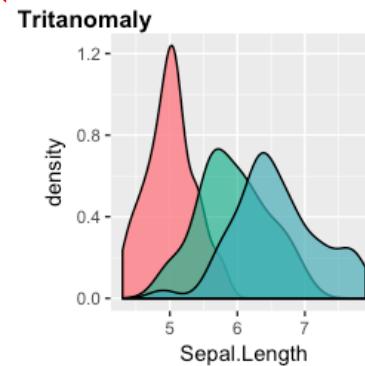
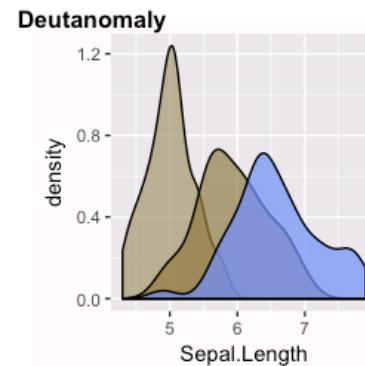


```
library(colorblindr)  
cvd_grid(myfig)
```

NB: The default ggplot colors
aren't colorblind or B/W
friendly

What would my graph look like to someone with
color deficiency?

colorblindr simulates a graph under various
conditions





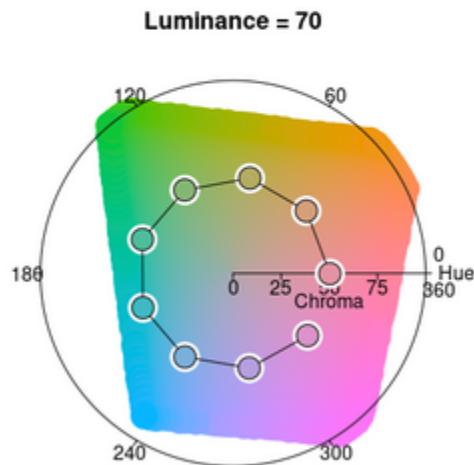
colorspace

2.0-0



A Toolbox for Manipulating and Assessing Colors and Palettes

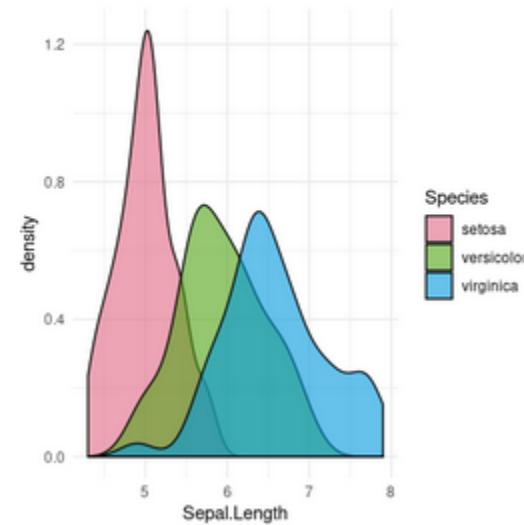
Color spaces



HCL-based palettes



ggplot2 scales



See: <http://colorspace.r-forge.r-project.org/>

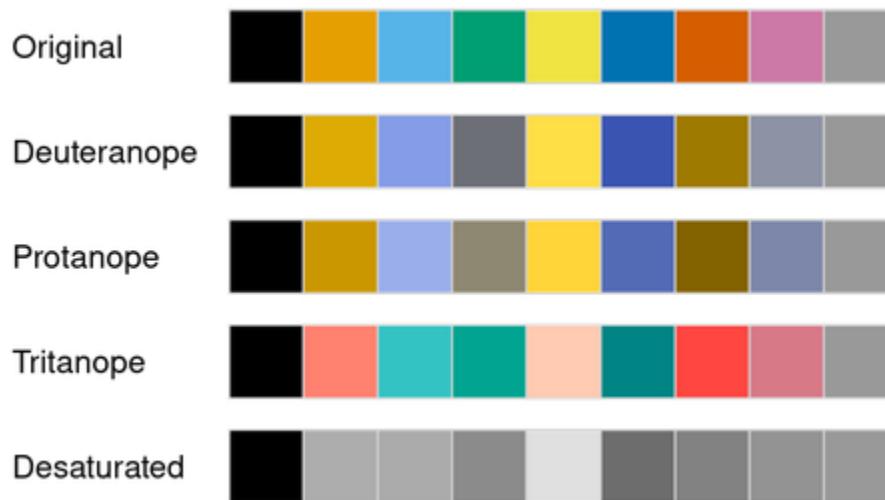
colorspace: palette visualization

swatchplot(): display collections of palettes in flexible ways



Effect of varying hue, chroma and luminance individually

```
swatchplot(  
  "Hue"    = sequential_hcl(5, h = c(0, 300), c = c(60, 60), l = 65),  
  "Chroma" = sequential_hcl(5, h = 0, c = c(100, 0), l = 65, rev = TRUE, power = 1),  
  "Luminance" = sequential_hcl(5, h = 260, c = c(25, 25), l = c(25, 90), rev = TRUE, power = 1),  
  off = 0  
)
```



Emulate different types of color vision deficiency for one or more palettes

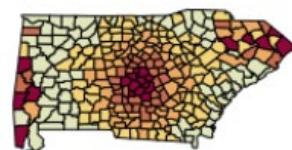
```
swatchplot(palette.colors(), cvd = TRUE)
```

colorspace: demoplot()

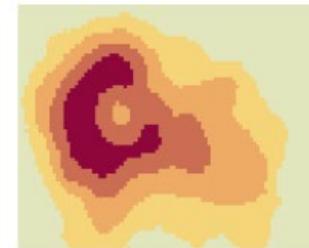
See how color palettes
work in different kinds
of statistical displays

demoplot(sequential_hcl(5, "Heat"))

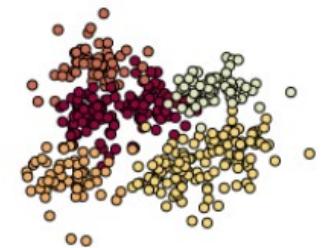
map



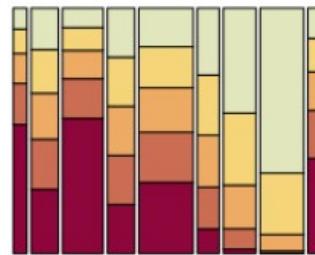
heatmap



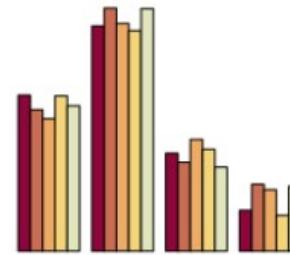
scatter



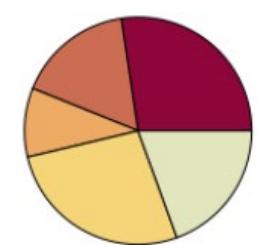
spine



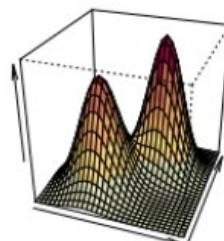
bar



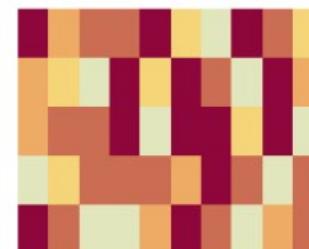
pie



perspective



mosaic



lines



Color Buddy

McNutt et al (2024) Mixing Linters with GUIs: A Color Palette Design Probe
→ Color Buddy Application for color palette editing, with usability testing

The screenshot shows the Color Buddy application interface. On the left, a sidebar lists a 'utah-colors' palette with various color swatches and their hex codes. The main area features a scatterplot titled 'test scatterplot' showing color samples in LAB color space. Below the scatterplot are various editing tools like 'Lighten', 'Saturate', and 'Distribute'. To the right, the 'Evaluation' tab is selected, displaying a list of evaluation criteria grouped under 'Usability', 'Contrast accessibility (WCAG)', 'Color accessibility (CVD)', and 'Design'. A red arrow points from the sidebar to the palette list, and another red arrow points from the palette list to the evaluation results.

Palette is evaluated along a set of criteria

Choose color palette

McNutt et al.
<https://arxiv.org/abs/2407.21285>

Color Buddy App: <https://color-buddy.netlify.app/>

Color: Lessons

- Use colors to represent differences in meaning
 - Avoid **gratuitous use of multiple colors**
 - Use consistent color scheme across multiple graphs of the same data (set your `palette()`)
- Consider presentation goal:
 - **Highlight** one subset against the rest?
 - Group a categorical variable
 - Encode a quantitative variable
- Consider differences in color perception, B/W printing

Color: Lessons

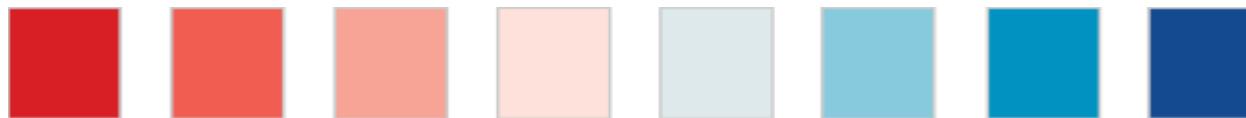
- Consider encoding scheme:
 - Categorical: Use a wide range of hues, of \sim same saturation



- Sequential: use a small range of hues of varying lightness



- Diverging: Use two sequential schemes, decreasing toward the middle



Images from: Stephen Few,
http://www.perceptualedge.com/articles/visual_business_intelligence/rules_for_using_color.pdf

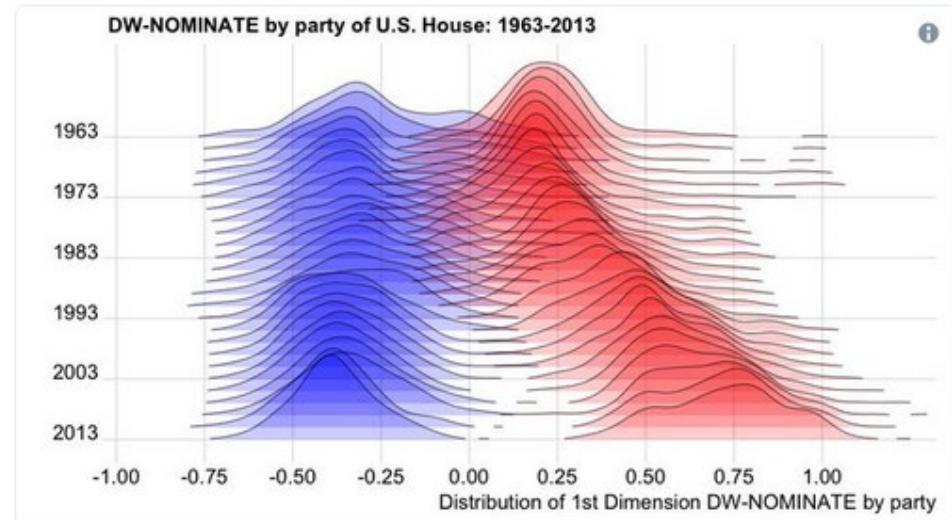
Transparency

Colors can be made partially **transparent**, by adding an “alpha” channel,
 $0 \leq \alpha \leq 1$ (opaque)

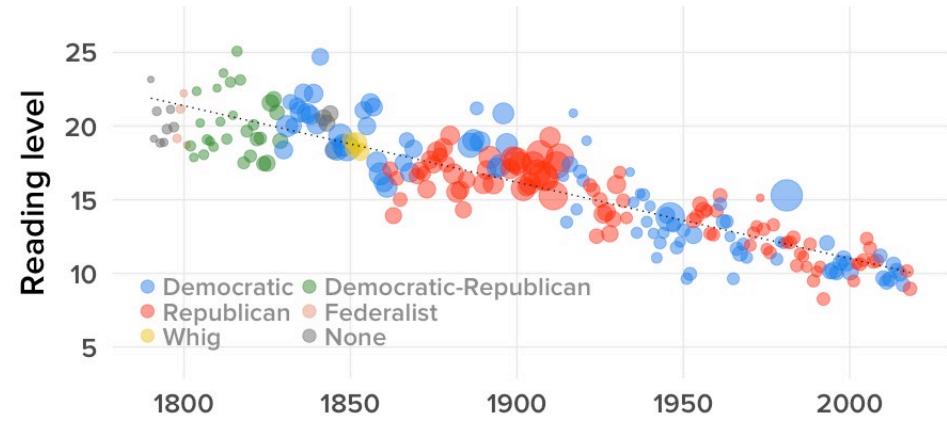
Filled areas combine to look more saturated
What do you see here?

This also works well with filled point symbols, which would otherwise be obscured when they overlap

Different colors “blend”
What do you see here?



Increasing polarization of votes in the US House

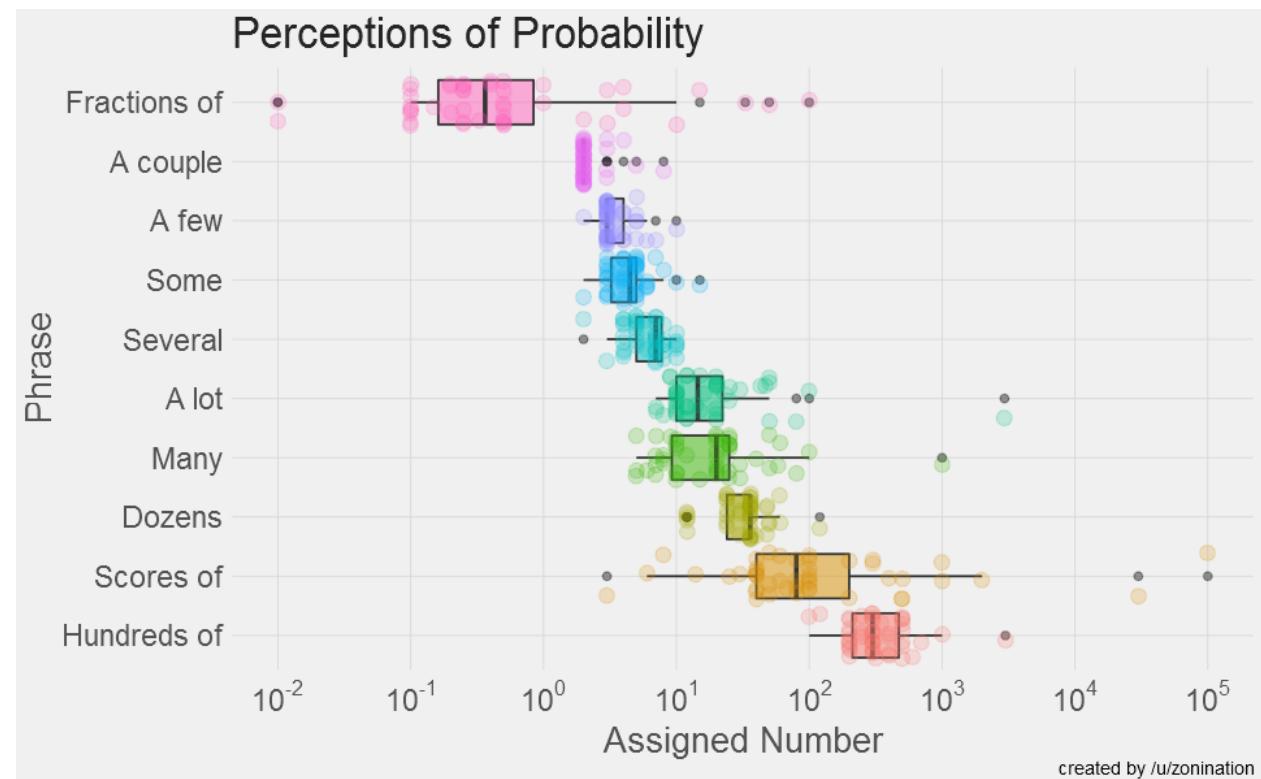


Reading level of US State of the Union Addresses 102

Transparency: Adding another layer

Transparency also works well to combine different graphical features in a plot
Here, a filled boxplot and dots representing individual observations

What number would you assign to the following phrases?



From: <https://github.com/zonation/perceptions>

Summary

- In designing data graphics, consider the viewer
 - Info → encoding → image → decoding → understanding
- Perception: much is known, with ~ links to graphics
 - ↑ Bottom up: perceptual features, what grabs attention
 - ↓ Top down: expectations provide a context
 - ☺ Encoding attributes must consider what is to be seen
- Color: What is the presentation goal?
 - Color palettes for different purposes
 - Transparency increases the effective use of color
- Cognition: What is the viewer's TASK?