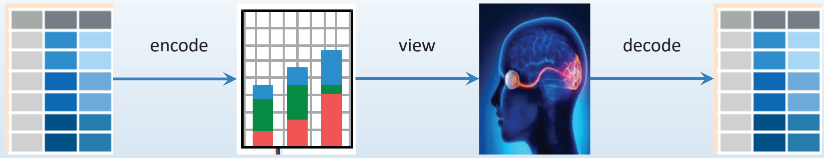


Graphical Perception

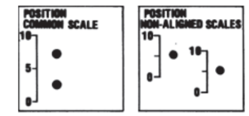
Michael Friendly

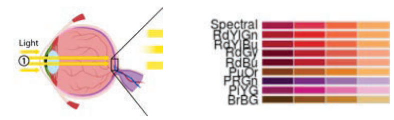
Psych 6135

https://friendly.github.io/6135

Topics

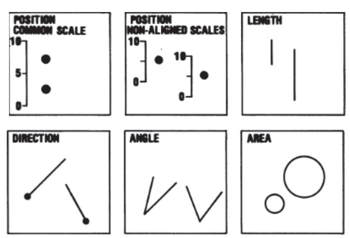
- Perception & Cognition
  - Encoding, decoding
  - Top-down vs. bottom-up processing
- Perceptual aspects
  - Illusions
  - Gestalt factors
  - Accuracy of decoding
- Cognitive aspects
  - Memory
  - Color





Graphical Perception

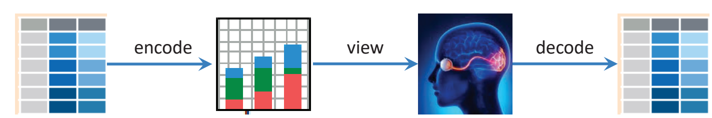
- In constructing a graph, quantitative and categorical information is encoded by visual attributes:
  - Length
  - Position along axis
  - Angle
  - Area
  - Color, shape, line style



- 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



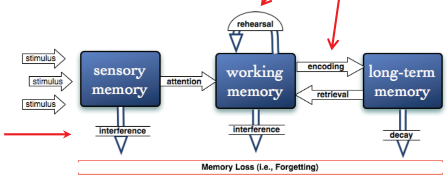
- Encoding should rely on features that can easily be decoded
- Often, easier said than done! The devil is in the details

Visual & cognitive systems

- A simplified model: Three stages

How to preserve info?

How is info lost?

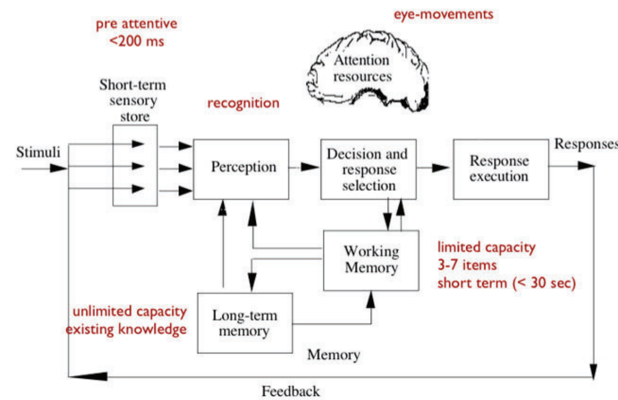


- Sensory (iconic) memory
  - pre-attentive, automatic, feature detection
  - massively parallel, short duration, easily fooled ("thinking fast")
- Working memory
  - requires attention, limited capacity (~ 4-6 "chunks")
  - memory aids: rehearsal; imagery
- Long-term memory
  - real-world knowledge,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

Perception vs. cognition

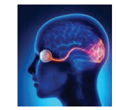
Another coarse distinction:

- **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?



Based on slide from G. Grinstein

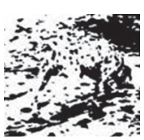
Perception: Bottom-up & Top-down

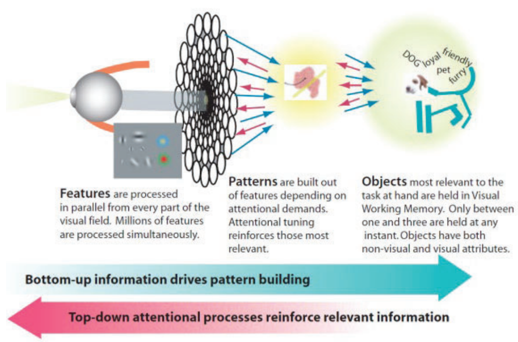
- Bottom-up processing
  - Low level: features → pattern → object
  - Detect edges, contours, color, motion
- Top-down processing
  - Driven by goals, expectations
  - Uses prior knowledge, experience, filters what we "see"

Epistemology

Empiricism
Aristotle

Rationalism
Plato





Perception: Bottom-up

How many 5s in this display?

1561321203658413076510374627
4173127527327592732990709742
1703707774179527931749270973
4019743217909370945179279417

How many 5s in this display?

1561321203658413076510374627
4173127527327592732990709742
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 character?

What here?

An ambiguous figure!

What is the middle letter in each word?

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

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?

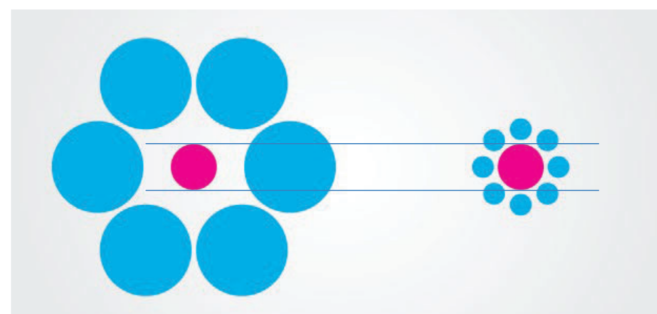
Surrounding context pulls perception of length in its direction

This is the famous **Müller-Lyre** illusion

Illusions: Area

Surrounding context matters in judging the area of objects.

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

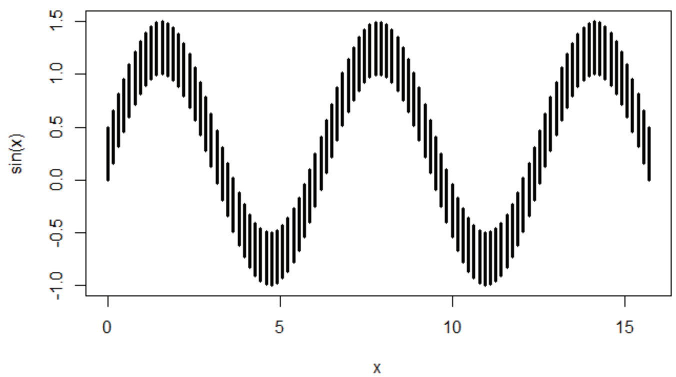


Surrounding context pulls perception of area against the background

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?

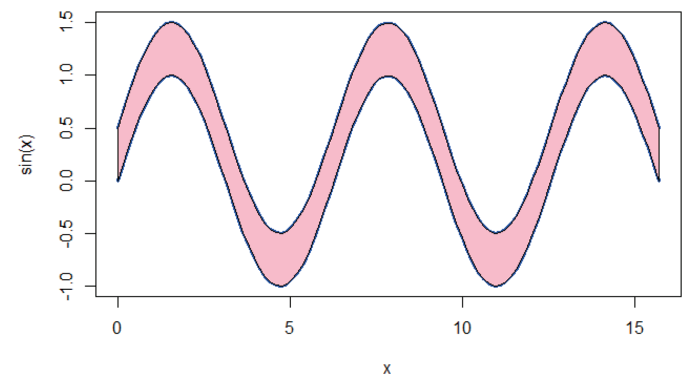


R code:

```
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

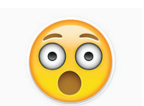
Where are differences between curves are larger? Or, are they all the same?



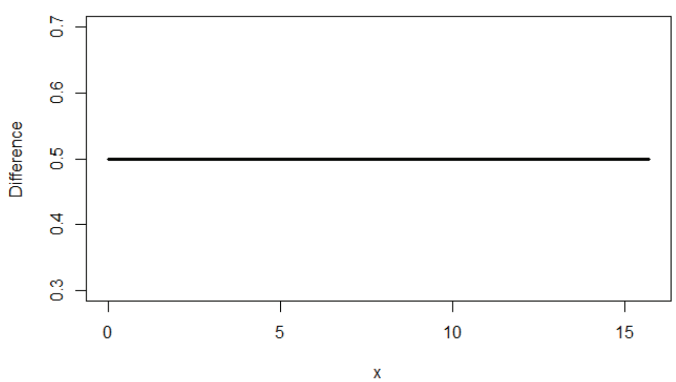
This is sometimes called the “sine illusion”

Illusions: Difference

Plotting the difference directly gives the answer.



OMG!

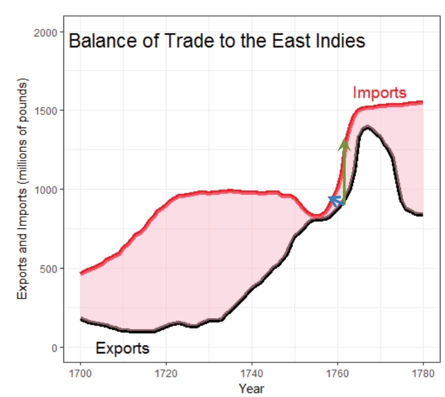


Why does this matter?

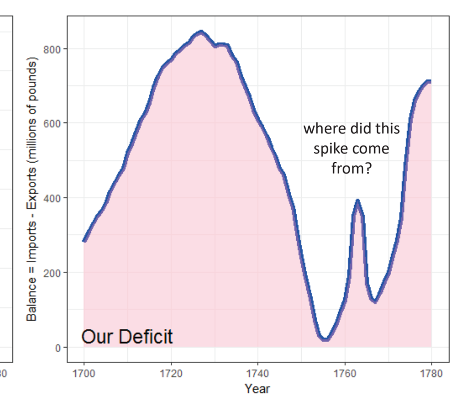
Distances between curves

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

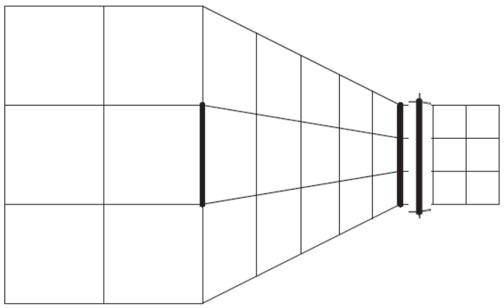


Plot of difference

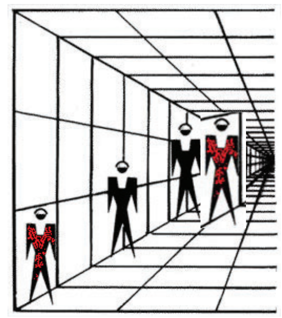


Illusions: Perspective

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



Which figure is tallest?
Or, all the same?

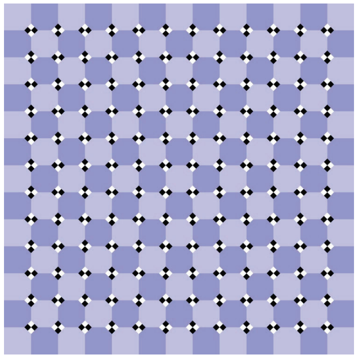


This is often called the **Ponzo** illusion: We judge the size of real-world objects relative to their background and perspective.

Context illusions: Lines, shapes

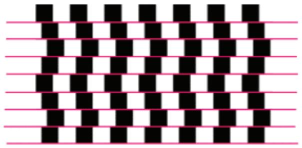
Perception of elements of a scene is affected by context, background, etc.

Are the squares straight or tilted?



It is hard not to be fooled by these!

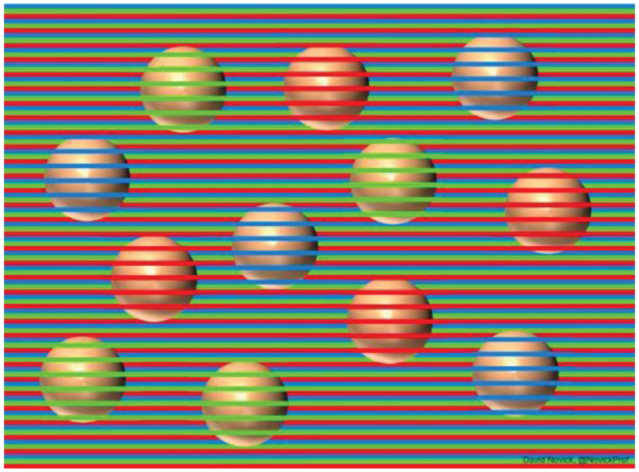
Are the pink lines straight or curved?



Does the rectangle change in darkness?

Context illusions: Color

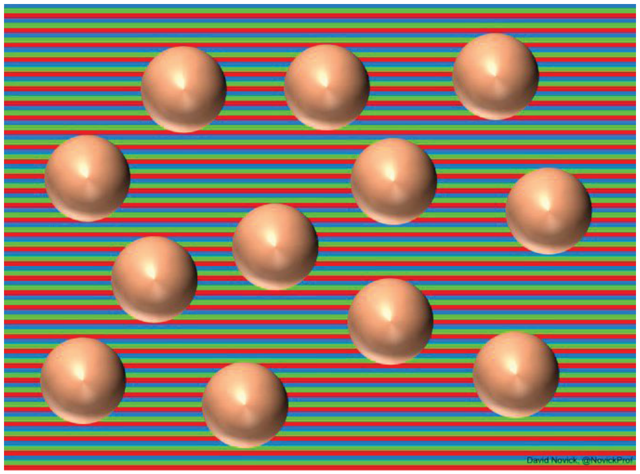
Are the balls different colors or are they all the same color?



https://twitter.com/novickprof/status/1139342022551191553

Context illusions: Color

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

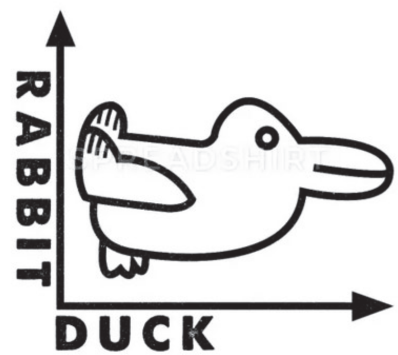


More examples: http://engineering.utep.edu/novick/colors/

Illusions: Semantic/cognitive

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

Is this image a duck, or a rabbit?

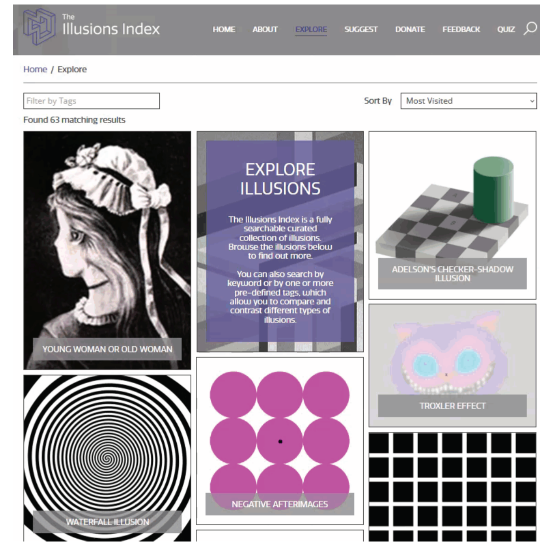


Duck or rabbit?

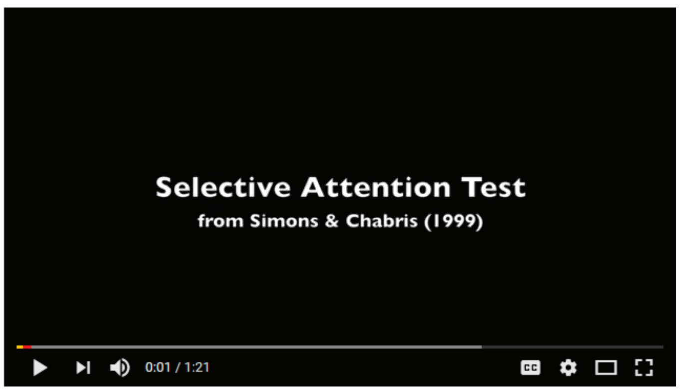
Catalog of visual/auditory illusions

https://www.illusionsindex.org/illusions

A large collection of illusions with references to research studies.



Selective attention



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

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

Magnitude estimation

How large are transport accidents?
How much bigger than non-transport accidents?

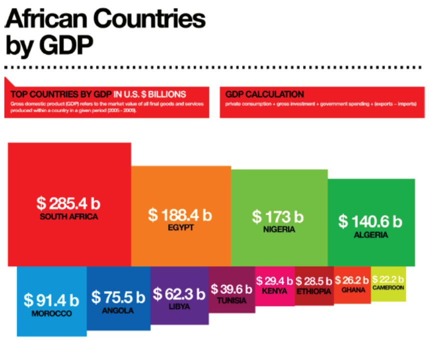
transport

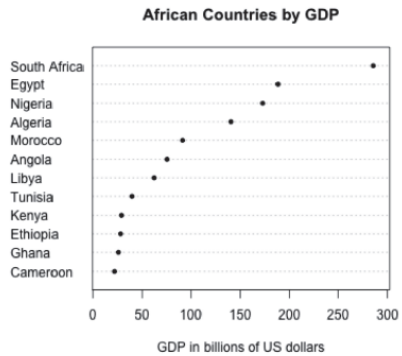
non-transport

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)





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 ≈ 1)
  - area, depth: sub-sensitive (p <1)
  - electric shock: hyper-sensitive (p > 1)
- But: graph perception is not always a matter of estimating magnitudes.

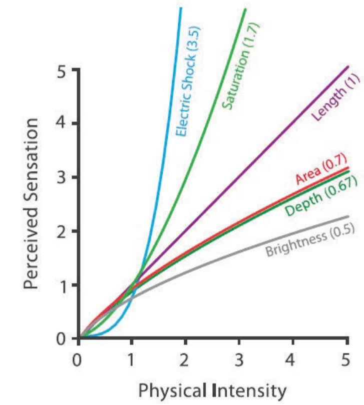


Fig. 5.7 from: Munzner, *Visualization Analysis & Design*

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?

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

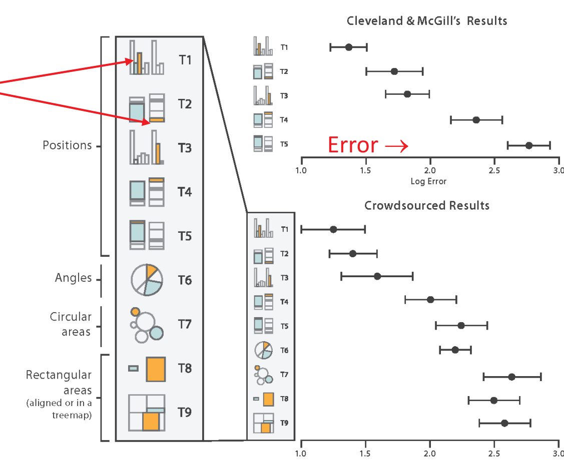


Fig. 5.8 from: Munzner, *Visualization Analysis & Design*

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

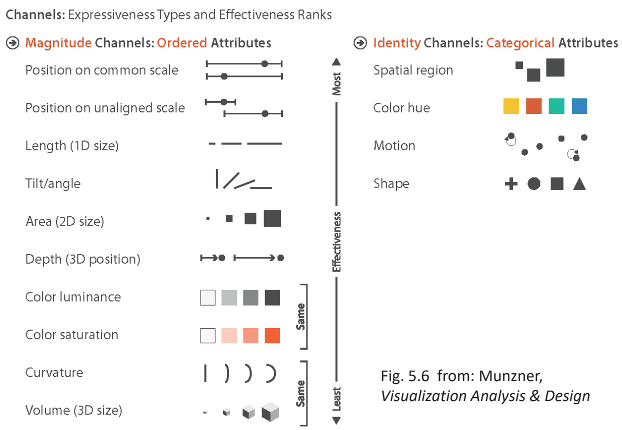
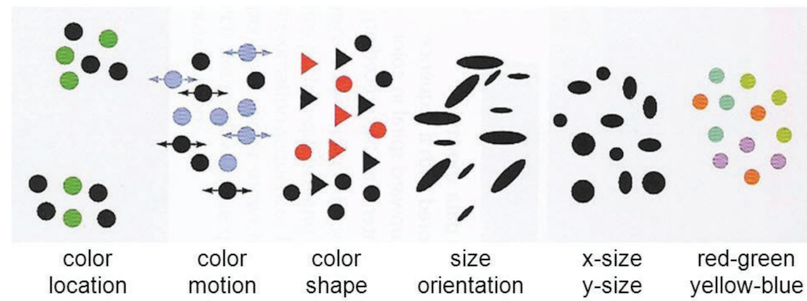


Fig. 5.6 from: Munzner, *Visualization Analysis & Design*

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

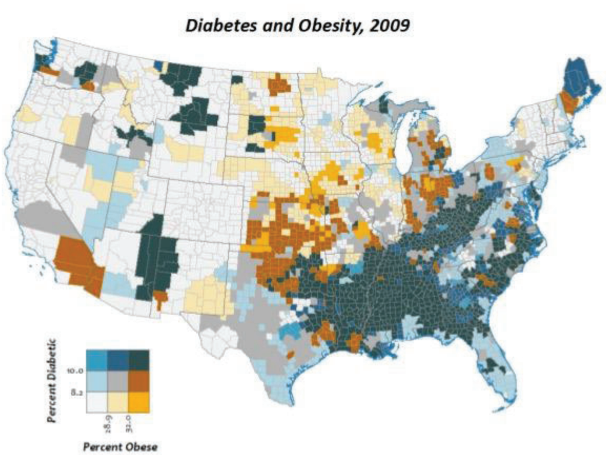
← Separable Integral →



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

Integral dimensions

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



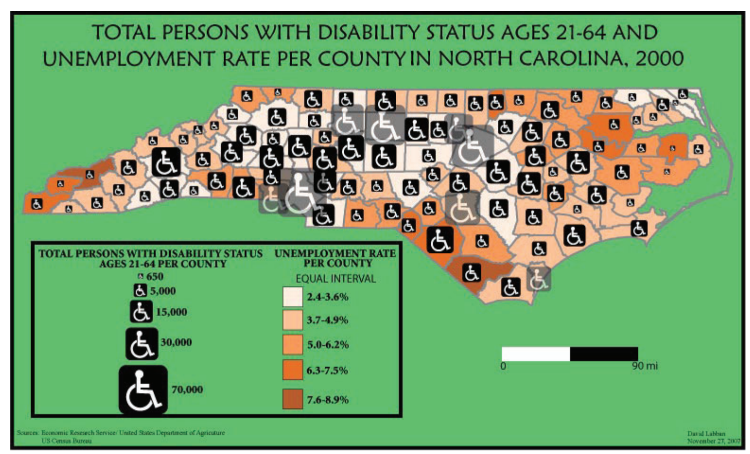
It is difficult to see variations in diabetes separately from obesity

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

Separable dimensions

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

- These an be seen separately
- (However, TOTAL disability is confounded with population density)



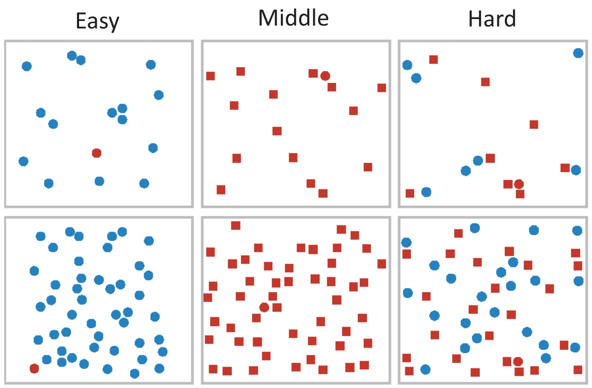
Anomaly detection

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.

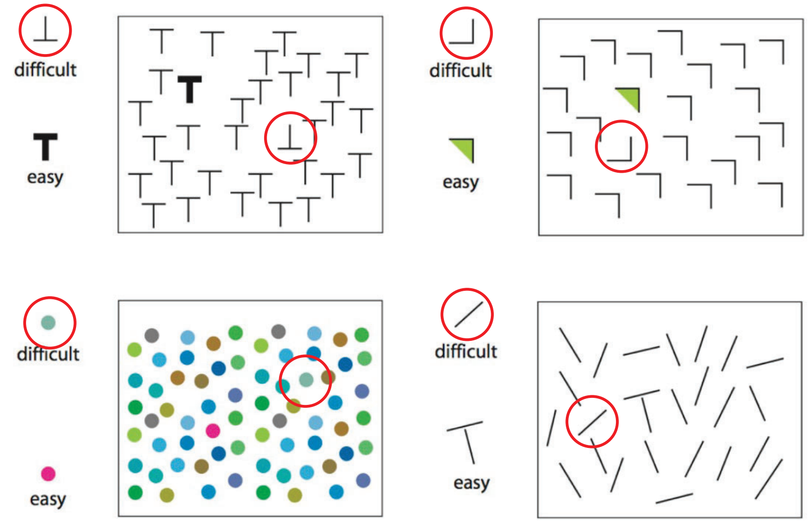
This is important in designing graphs to highlight some points.



Anomaly detection

For each display, find the anomaly shown at the left

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

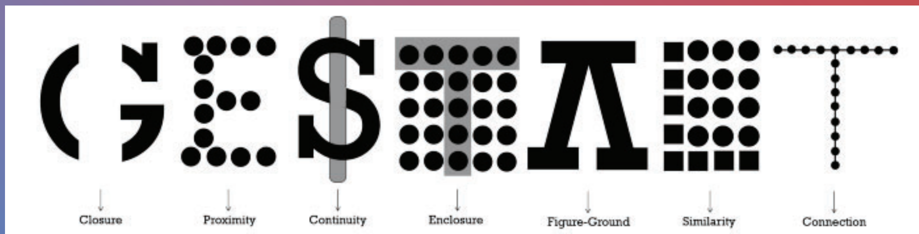


Encodings: Lessons

- 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



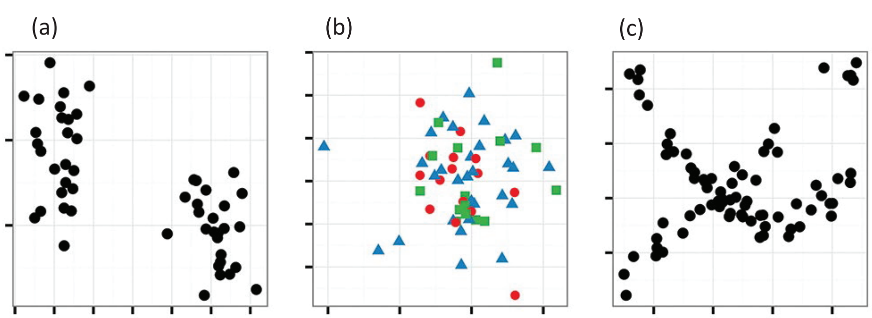
Gestalt principles of graph perception

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

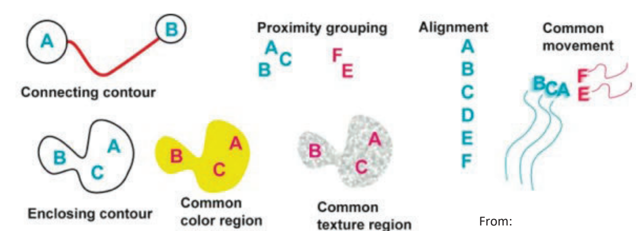
Gestalt principles

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



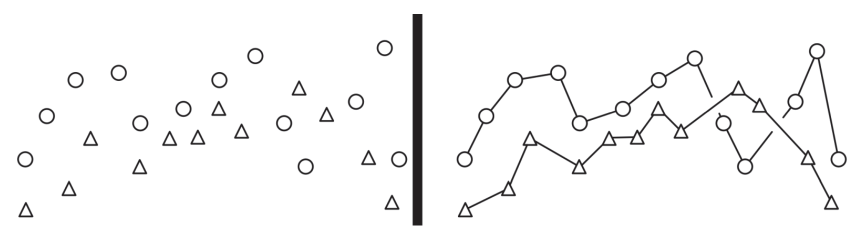
Gestalt principles

More gestalt ideas



From: http://blog.yhwu.me/notes/visualizations/cs171.html

Why lines are good in time series graphs

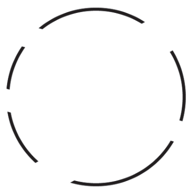


Closure

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

Logos: Empty space or a symbol?

5 arcs or a circle?



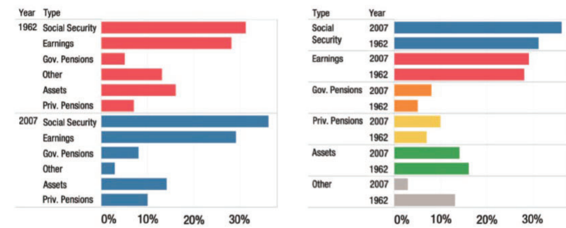
blobs or an animal?

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

From: Franconeri etal (2021) Source DOI: 10.1177/15291006211051956.

Visual grouping & comparisons

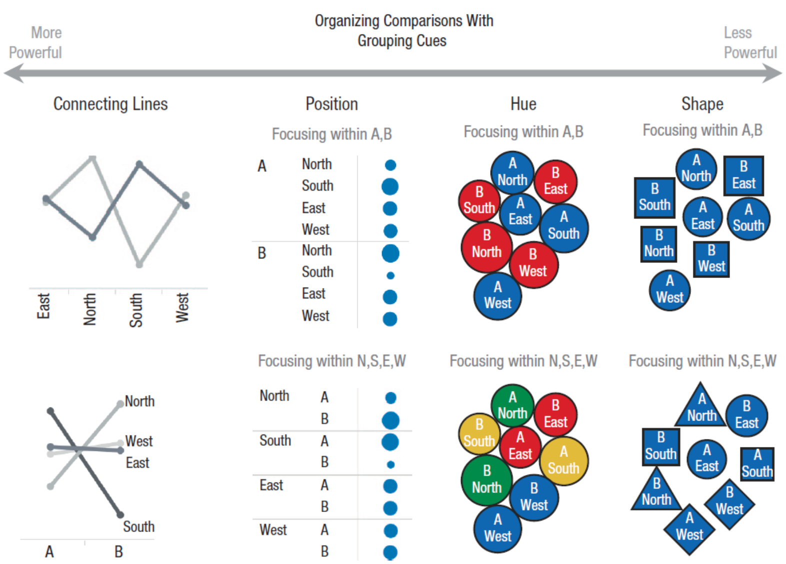
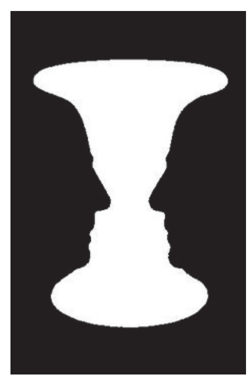


Fig. 8. Several grouping cues that can control how data values are compared. Connecting lines are particularly powerful cues, followed by proximity, color, and shape (Brooks, 2015).

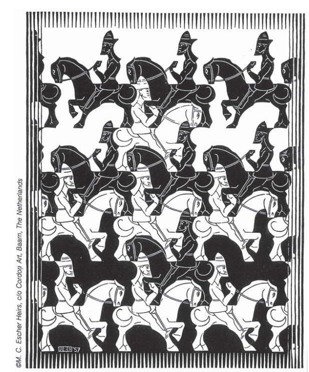
Figure - Ground

What is the figure? What is the background?

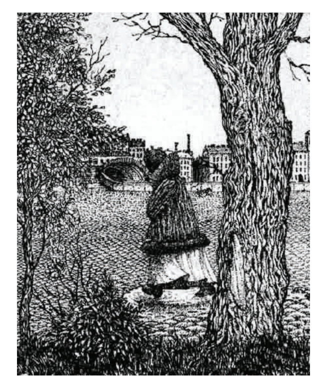
Face or vase?



Black or white soldiers?

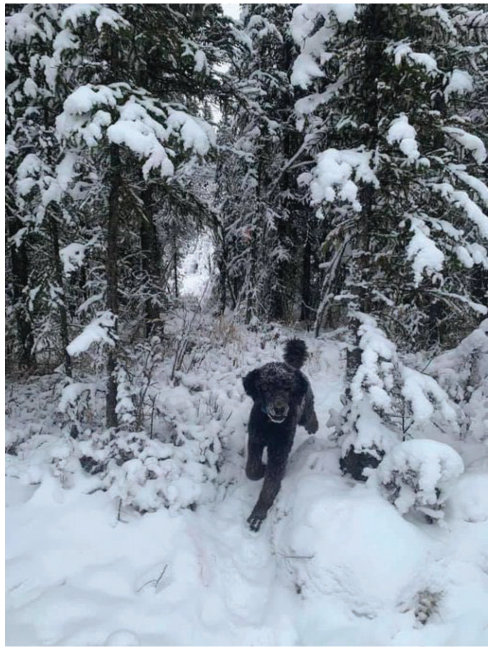


Face or park?



These examples all use different techniques to create ambiguous figures

Ambiguous figures: Priming



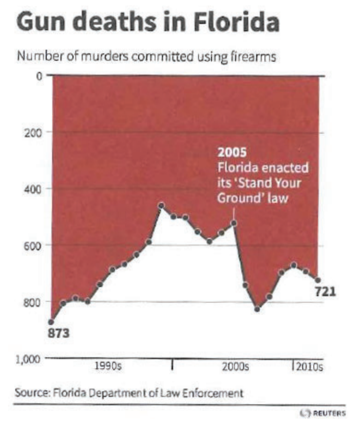
Can you see the poodle in this scene?

What about the man?

Semantic priming: Suggestion increases likelihood of perception

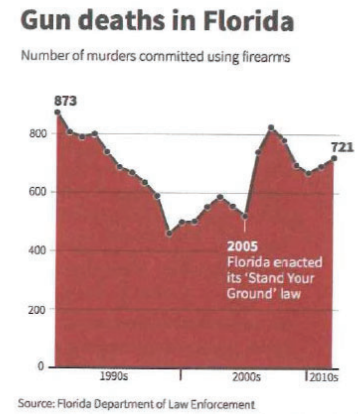
Figure - Ground

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



We tend to see 1999 & 2005 as high points

A more conventional version of the same graph



Gun deaths increased after the 'Stand your ground' law

From: Andy Kirk, *Data Visualization: A Handbook for Data Driven Design*

Discussion

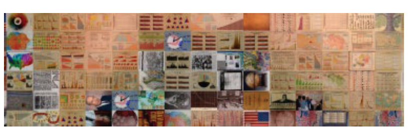
What perceptual features or principles are involved in your reading or understanding of these figures?

Top-down ?
Bottom-up?
Gestalt?

or this?

or this?

What about this?

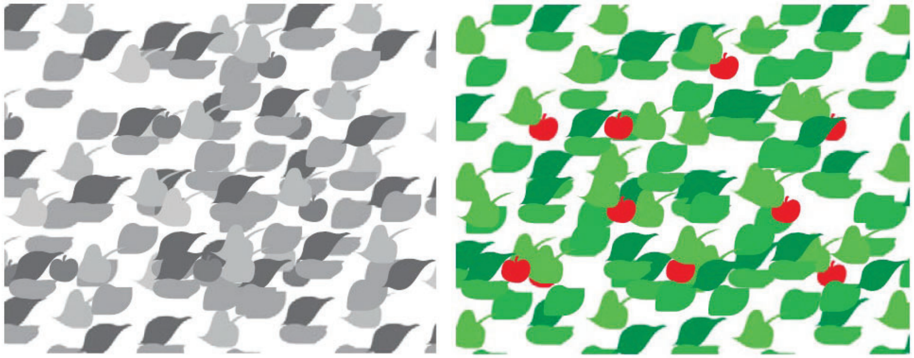


Color: Functions in data graphics

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



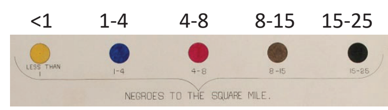
From: Colin Ware, *Information Visualization: Perception for Design*

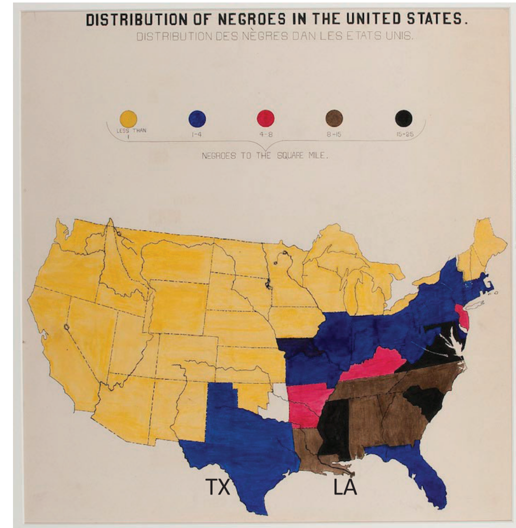
Nice graphic, naïve about color

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)?

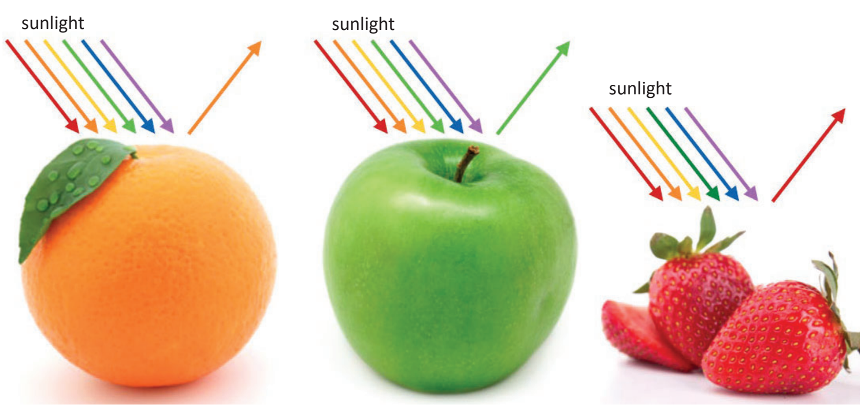




Object color

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



From: Miriah Meyer, lecture notes, cs6330, https://miriah.github.io/teaching/cs6630/

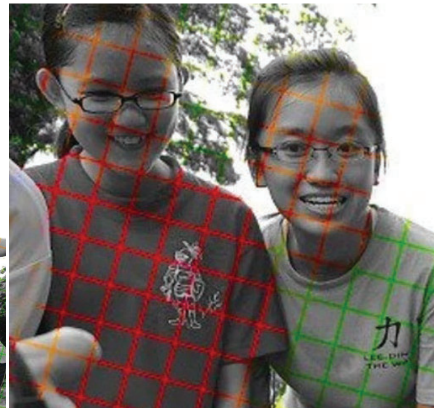
Is this a color photo?

"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

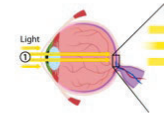


Color perception is influenced by top-down processes of scene recognition

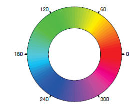
https://petapixel.com/2019/07/31/this-black-and-white-photo-uses-color-grid-lines-to-trick-your-brain/

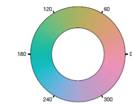
Color: Aspects in data graphics

- Perception: trichromatic theory
  - How the eye sees color

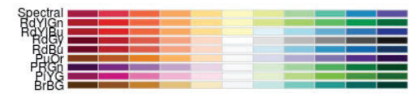


- Color spaces:
  - RGB (additive), CMYK (subtractive)
  - HSV, HCL: perceptually based





- Color palettes for computer graphics
  - ColorBrewer: sequential, diverging, qualitative
  - Color-blind safe ?
  - Photocopy safe ?

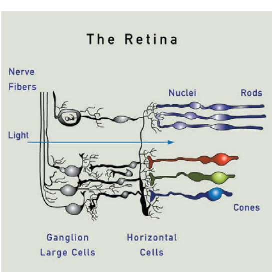


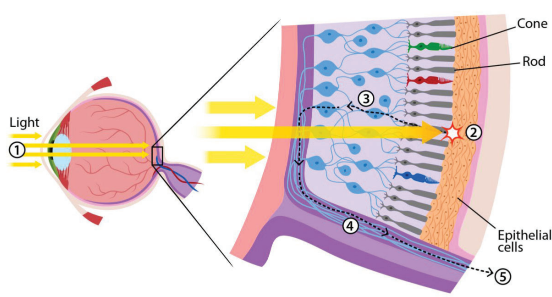
- Transparency

Perception: The human eye

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

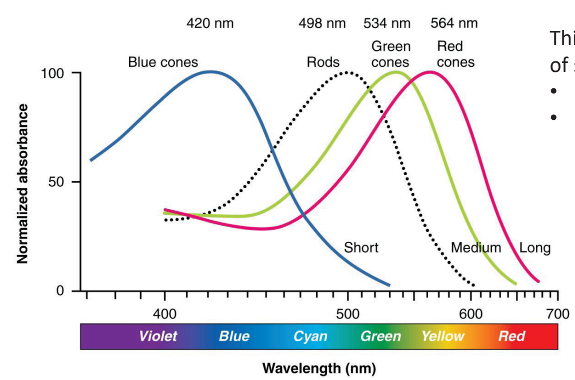
It is of interest to see the wide variety of ways this is conveyed in scientific diagrams:





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

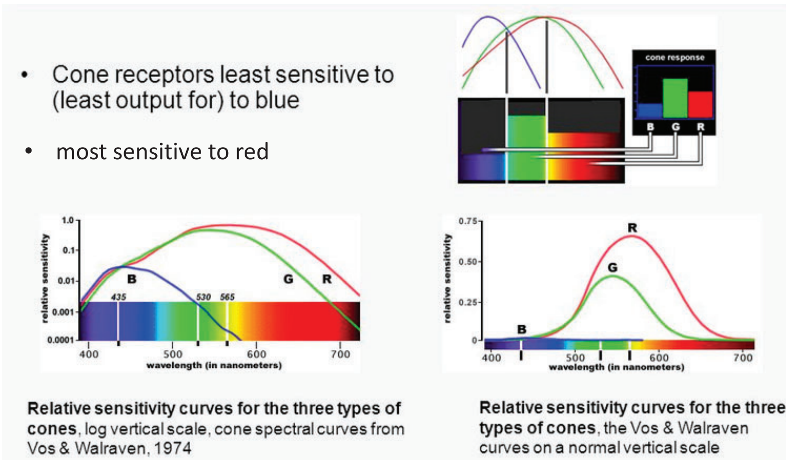


This figure also stimulates questions of scientific visualization

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

Perception: color sensitivity

Color sensitivity, shown on three different scales



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

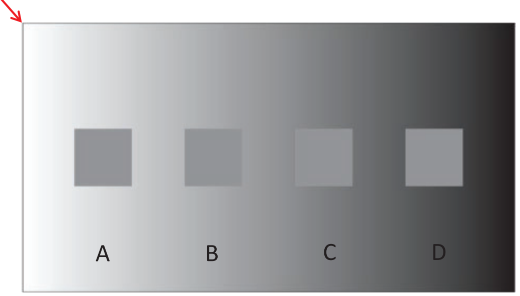
Perception: Contrast

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?

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

gray square



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.

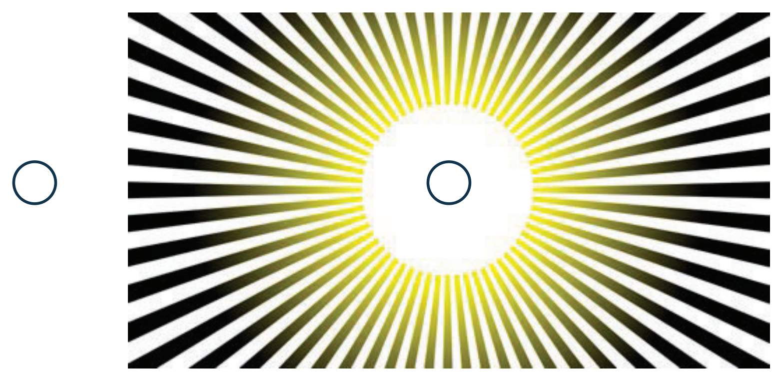
Showing yellow text on a black background works better. There is sufficient luminance contrast.

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?

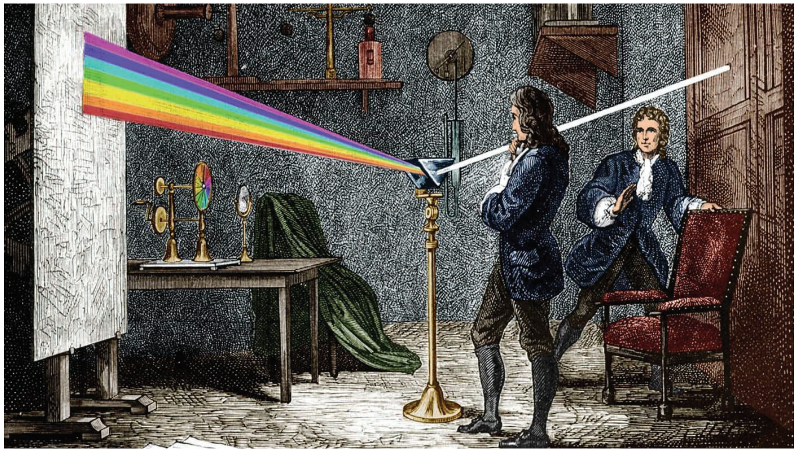
They are the same. We interpret the center as a source of light relative to the surrounding bright yellow.



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

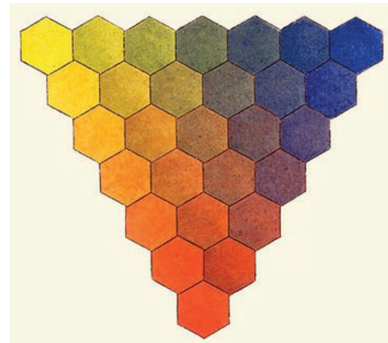
Discovery of color

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”



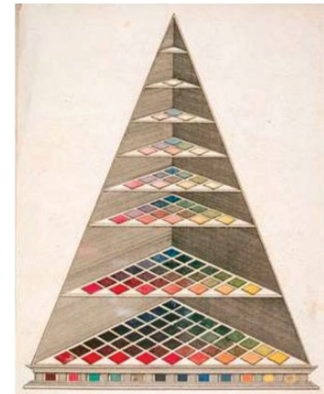
Early color theory

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



Introduces the idea of color “primaries”

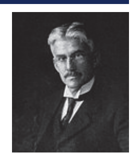
Johannes Lambert (1772) – A color pyramid, composed of 7 layers

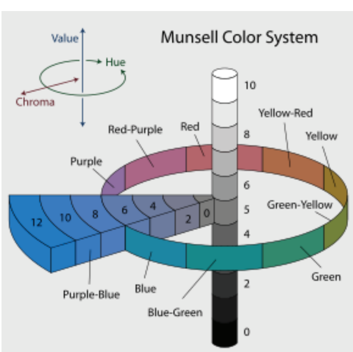


Introduces the idea of color saturation

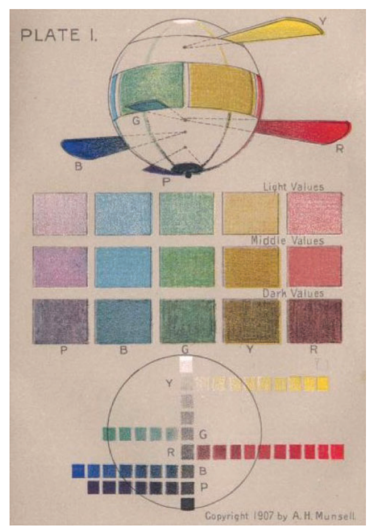
Color space: Munsell colors

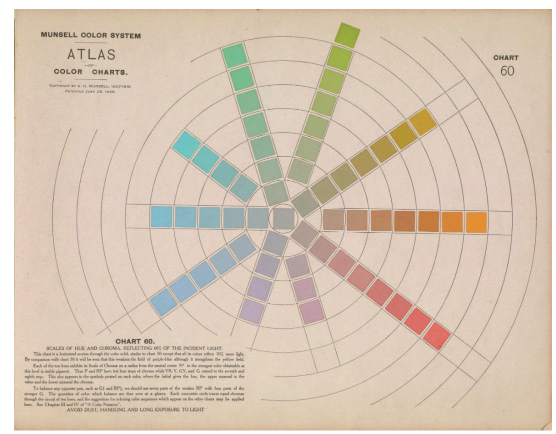
- Color space is 3D
  - How to specify a given color in perceptual terms?
  - Albert Munsell (~1930): hue, chroma, lightness (HCL)
  - These form perceptually uniform & independent dimensions





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



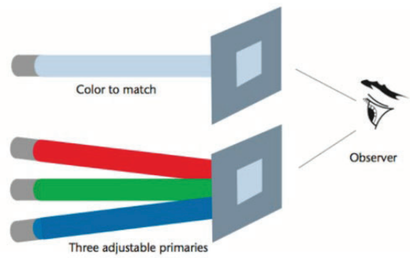


CIE color space

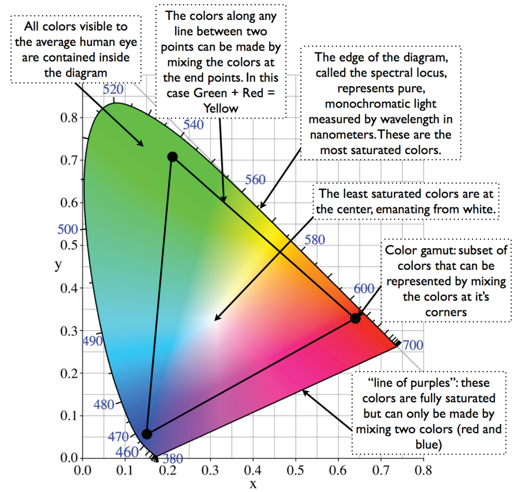
- How do we know about the perceptual properties of colors, taking spectral sensitivity into account?

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

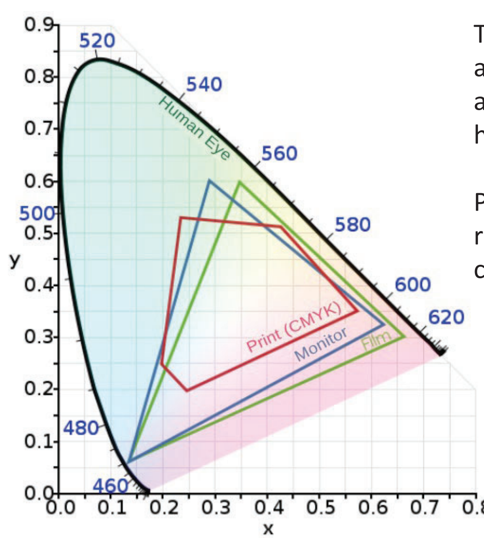
Mixture of primary pigment colours
Black

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

From: Alicja Gosiewska, Data Visualization Techniques, https://bit.ly/3RZWw0t

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"

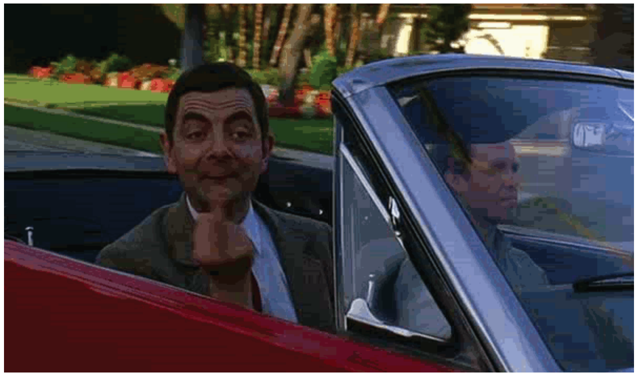
18	beige	#F5F5DC	245	245	220
19	bisque	#FFE4C4	255	228	196
20	bisque1	#FFE4C4	255	228	196
21	bisque2	#EED5B7	238	213	183
22	bisque3	#CDB79E	205	183	158
23	bisque4	#8B7D6B	139	125	107
24	black	#000000	0	0	0
25	blanchedalmond	#FFEBCD	255	235	205
26	blue	#0000FF	0	0	255
27	blue1	#0000FF	0	0	255
28	blue2	#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
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
76	darkgoldenrod1	#FFB90F	255	185	15
77	darkgoldenrod2	#EEAD0E	238	173	14
78	darkgoldenrod3	#CD950C	205	149	12
79	darkgoldenrod4	#8B6508	139	101	8
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



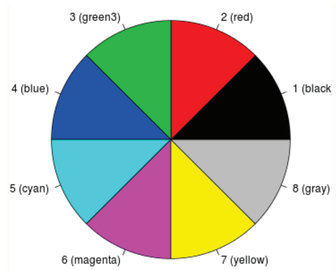
Every time you are forced to say "#008B8B" or "cyan4" a puppy dies somewhere

-- MF, 2018

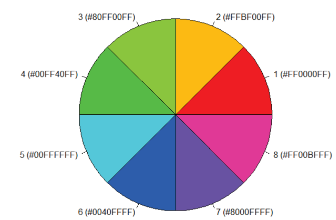
Software: palettes

- R (and other software) provide palettes of colors used for defaults in graphs
  - Not all are nice– depends on your purpose
  - But, 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)
```



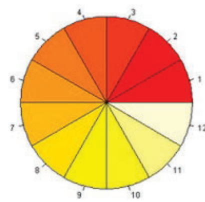
palette(rainbow(8)); pie(…)



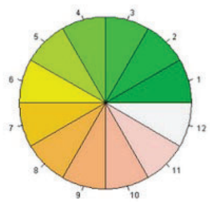
R: basic palettes

n <- 12
pie(rep(1, n), col=**rainbow**(n))

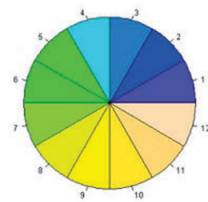
pie(rep(1, n), col=**heat.colors**(n))



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



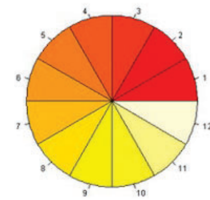
pie(rep(1, n), col=**topo.colors**(n))



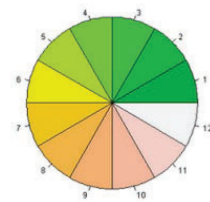
R: basic palettes

rainbow

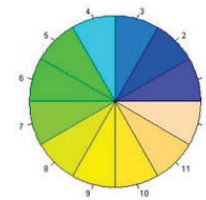
heat



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

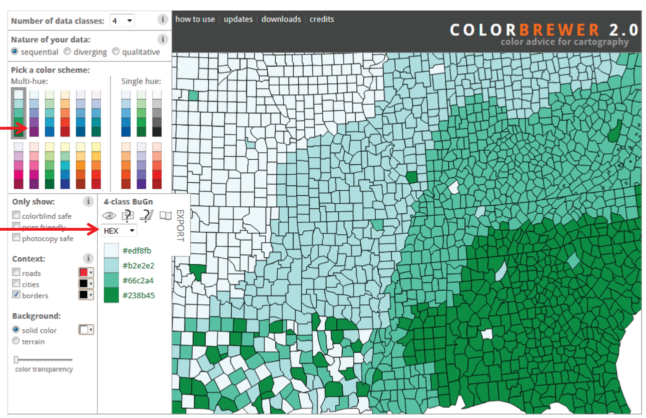
palettes: ColorBrewer

ColorBrewer, by Cynthia Brewer provides an interactive application for choosing color pallets, 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



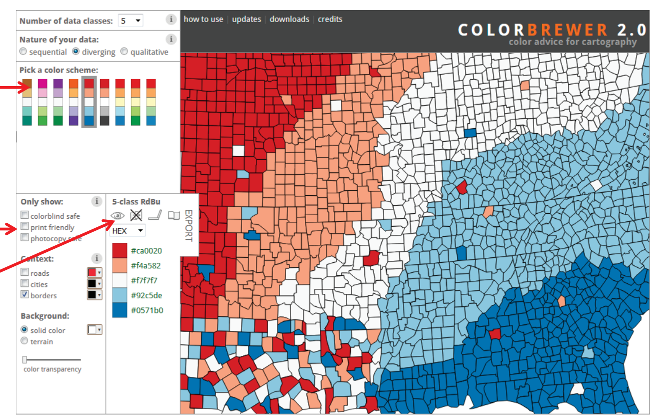
This example: http://colorbrewer2.org/#type=sequential&scheme=BuGn&n=4

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

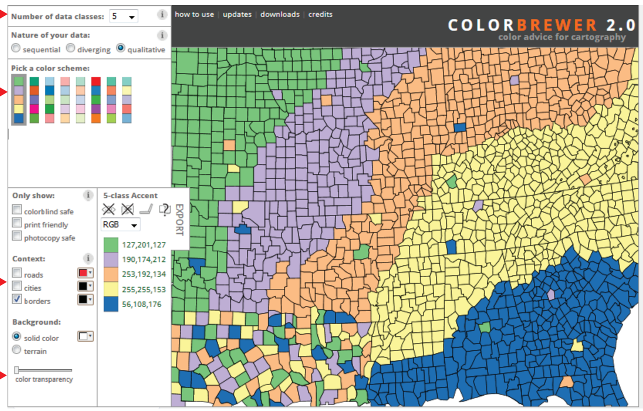
Qualitative schemes are designed to show a categorical variable, where we want to see differences among unordered categories

choose # classes

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

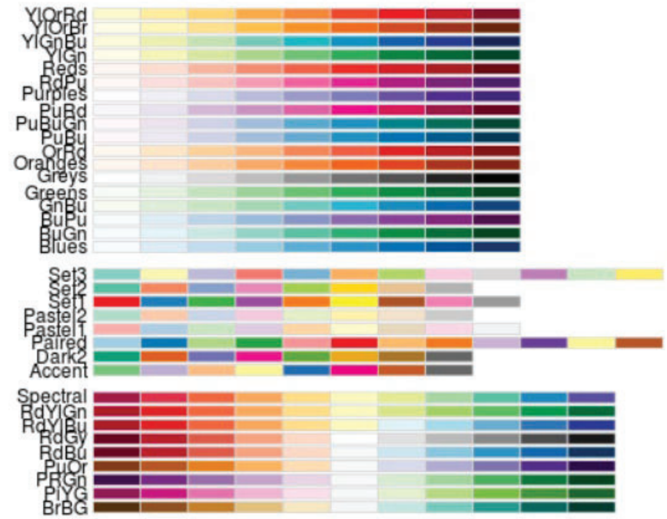
palettes: RColorBrewer

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

sequential

qualitative

diverging

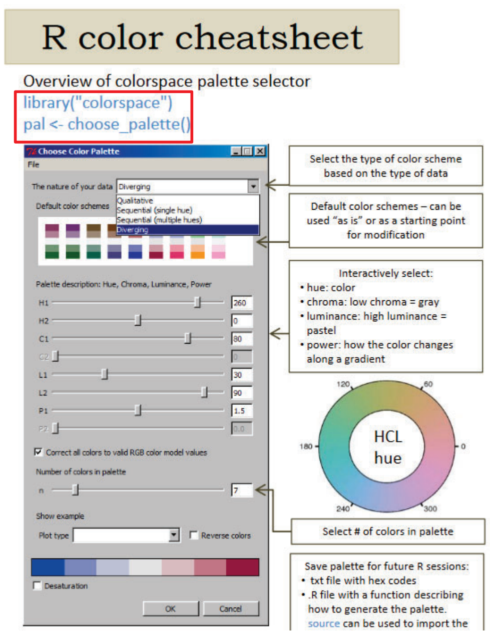


R: choose_palette()

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



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

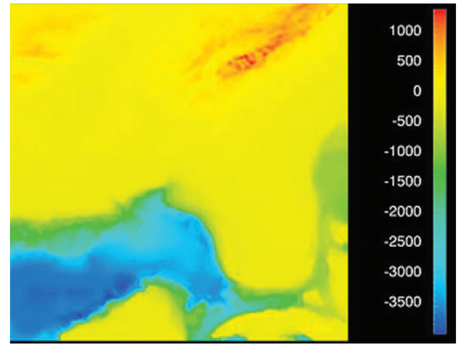
ColorBrewer palettes

viridis palettes

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

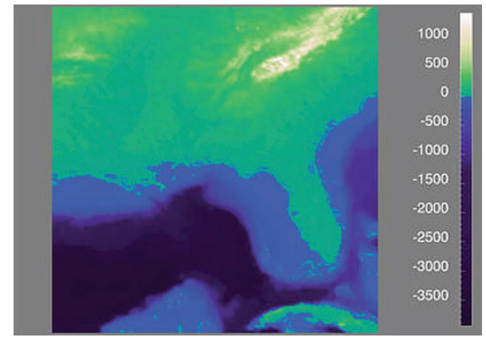
Comparing palettes

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

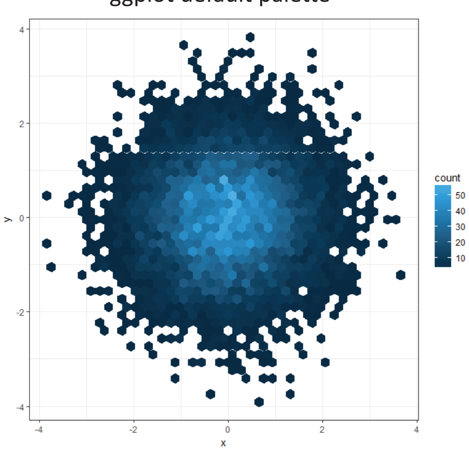


This color scheme was designed to reveal the essential topography of the map & to have perceptually equal elevation steps

From: http://www.research.ibm.com/people/l/lloydt/color/color.HTM

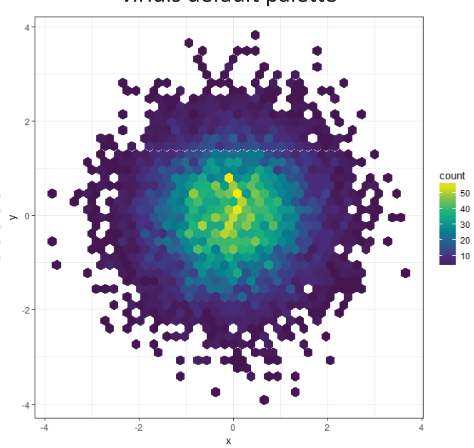
Comparing palettes

ggplot default palette



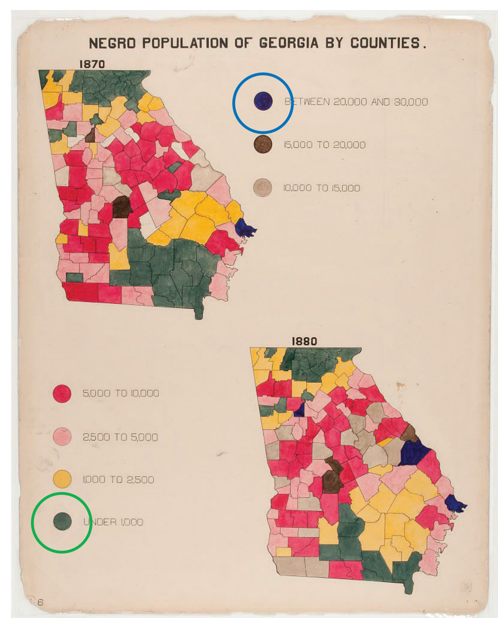

```
df <- data.frame(x = rnorm(10000), y = rnorm(10000))
g <- ggplot(df, aes(x = x, y = y)) +
    geom_hex(bins=40) + coord_fixed() + theme_bw()
g
```

viridis default palette




```
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

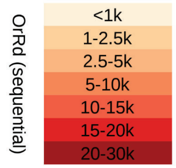
Which counties had largest Negro pop?

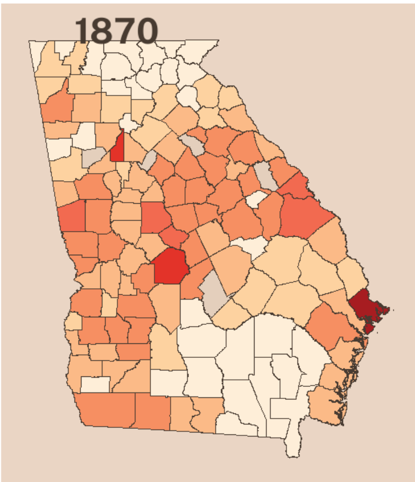
Which had lowest?

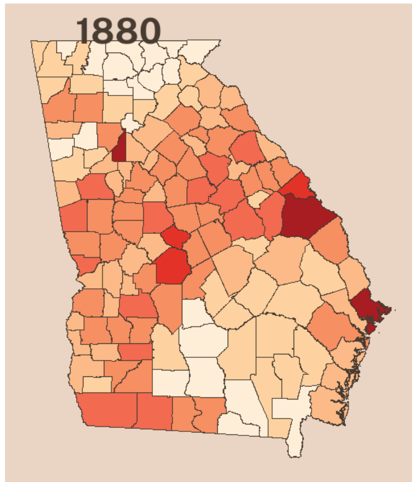
Where was the change greatest? (HARD: need to plot the diff^ce^)

RColorBrewer to the rescue

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

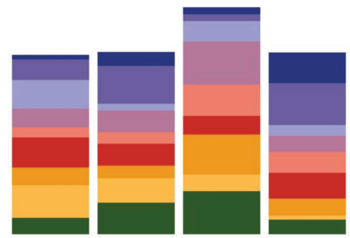


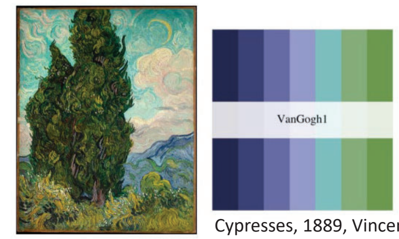




Metbrewer palettes

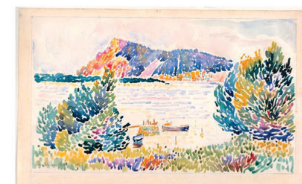
Artistic palettes inspired by works at the Metropolitan Museum of Art in New York





Cypresses, 1889, Vincent van Gogh

Cap Nègre, 1909, Henri-Edmond Cross

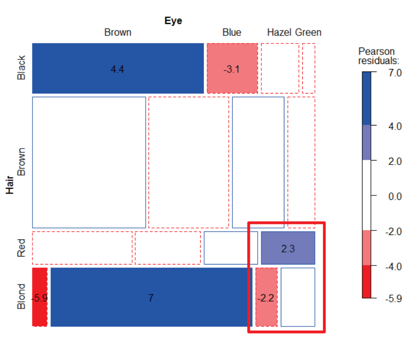


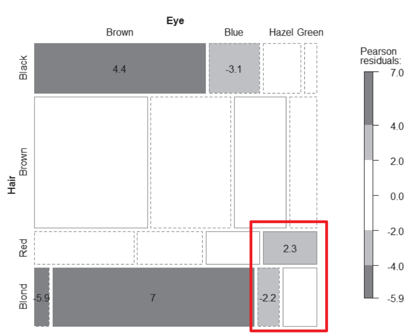
Color → B/W ?

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)

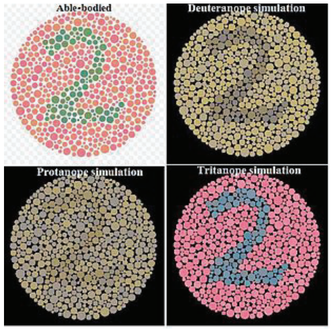
	1998–2002	2003–2005	2006–2009	2010–2013	2014–2016	Scale
Roads, streetscapes	30	35	54	83	15	0 - 10
Culture, community, recreation	26	50	59	47	16	11 - 20
Parks	27	41	41	52	20	21 - 30
Affordable housing	17	26	38	56	11	31 - 40
Public art	26	25	41	32	4	41 - 50
Heritage	16	13	26	18	3	51 - 60
Transit	11	7	10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



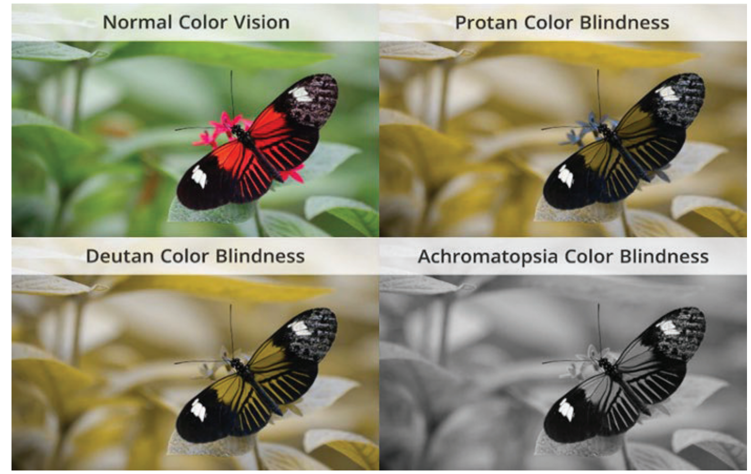
- Protanopia (red deficient)
- Deuteranopia (green deficient)
- Tritanopia (blue deficient)

Some form of red-green insensitivity is most common
- about 6-8% of population
- more common in males

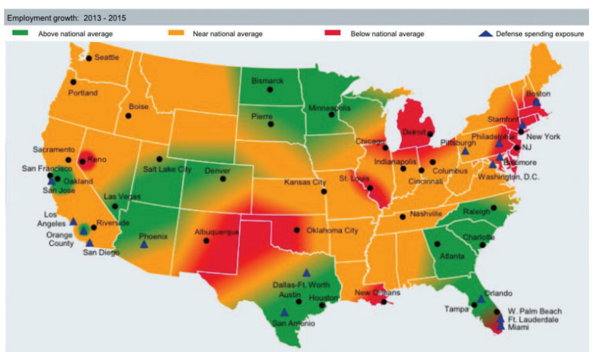
TIP: Avoid color scales with main variation between red & green

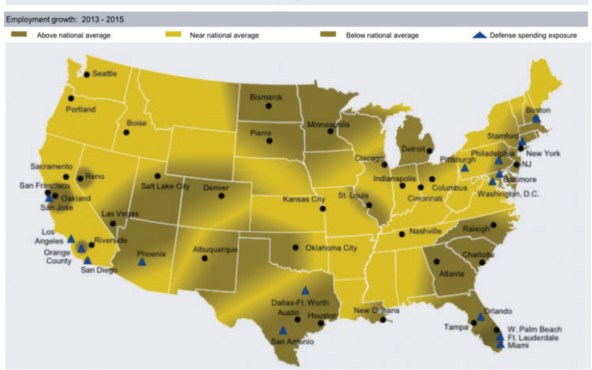
Colorblindness

What an image looks like with various forms of color deficiency



Red-green colorblindness: -R (protan) ≈ -G (deuteran)





Goal: Show employment growth, 2013—2015

Original design, using
- green: above average
- red: below average

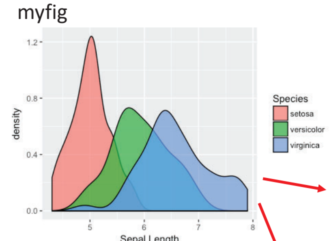
How this looks to someone with red-green colorblindness

red & green become indistinguishable

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

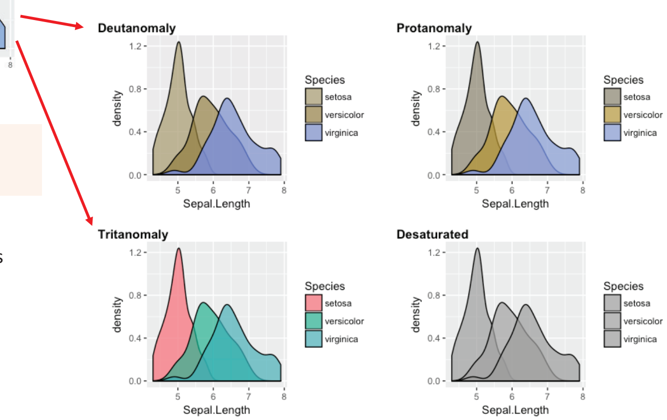
colorblindr package

myfig



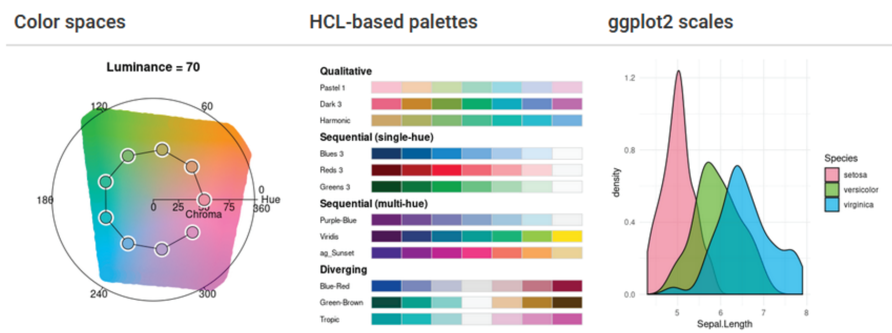
What would my graph look like to someone with color deficiency?
colorblindr simulates a graph under various conditions

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



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

A Toolbox for Manipulating and Assessing Colors and Palettes



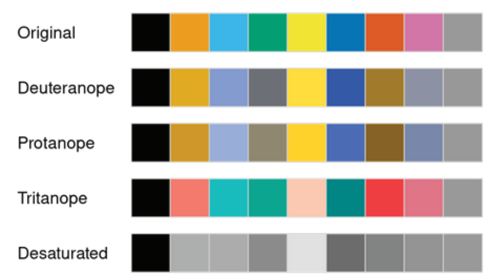
See: http://colorspace.r-forge.r-project.org/

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
)
```

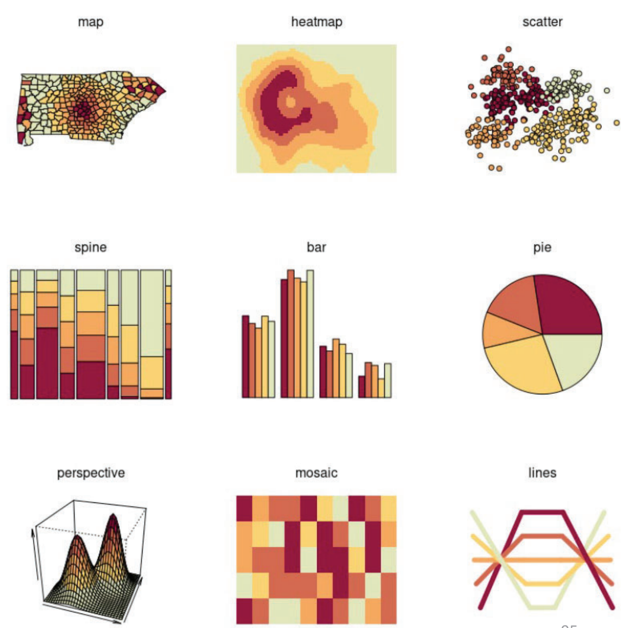


Emulate different types of color vision deficiency for one or more palettes

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

colorspace: demoplot()

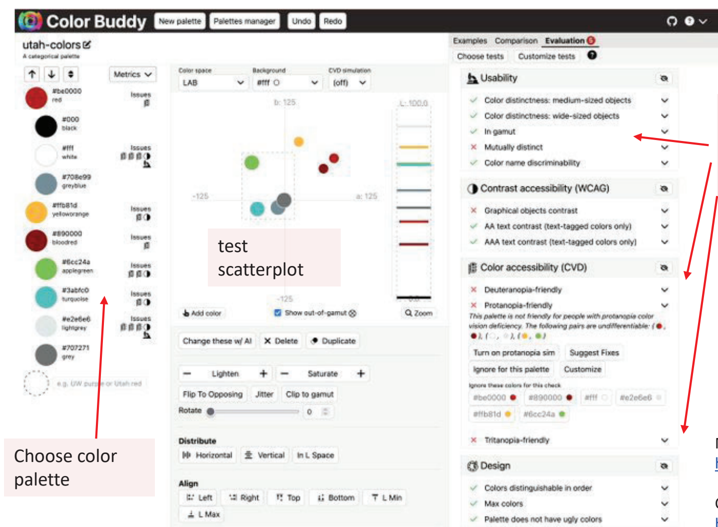
`demoplot(sequential_hcl(5, "Heat"))`



See how color palettes work in different kinds of statistical displays

Color Buddy

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



test scatterplot

Choose color palette

Palette is evaluated along a set of criteria

McNutt etal.
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 ~ same saturation

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

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

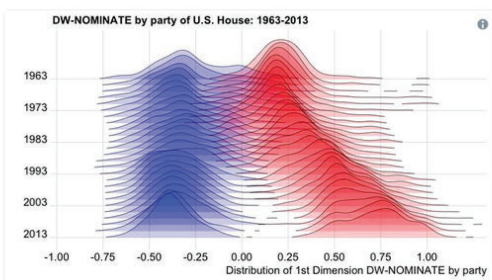
Images from: Stephen Few, http://www.perceptualedge.com/articles/visual_business_intelligence/rules_for_using_color.pdf

Transparency

Colors can be made partially transparent, by adding an "alpha" channel,

$0 \le \alpha \le 1$ (opaque)

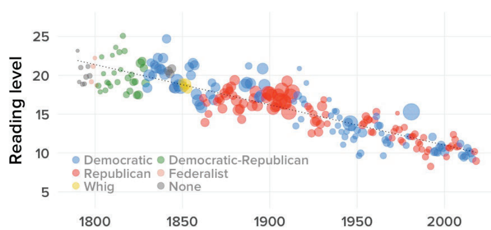
Filled areas combine to look more saturated
What do you see here?



Increasing polarization of votes in the US House

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

Different colors "blend"
What do you see here?

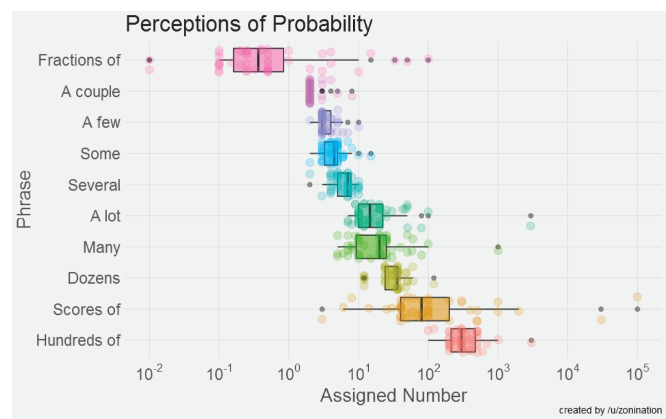


Reading level of US State of the Union Addresses

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/zonination/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