

Lesson 2: Designing Graphs to Enlighten: Principles and Best Practices

**Dr. Kam Tin Seong
Assoc. Professor of Information Systems**

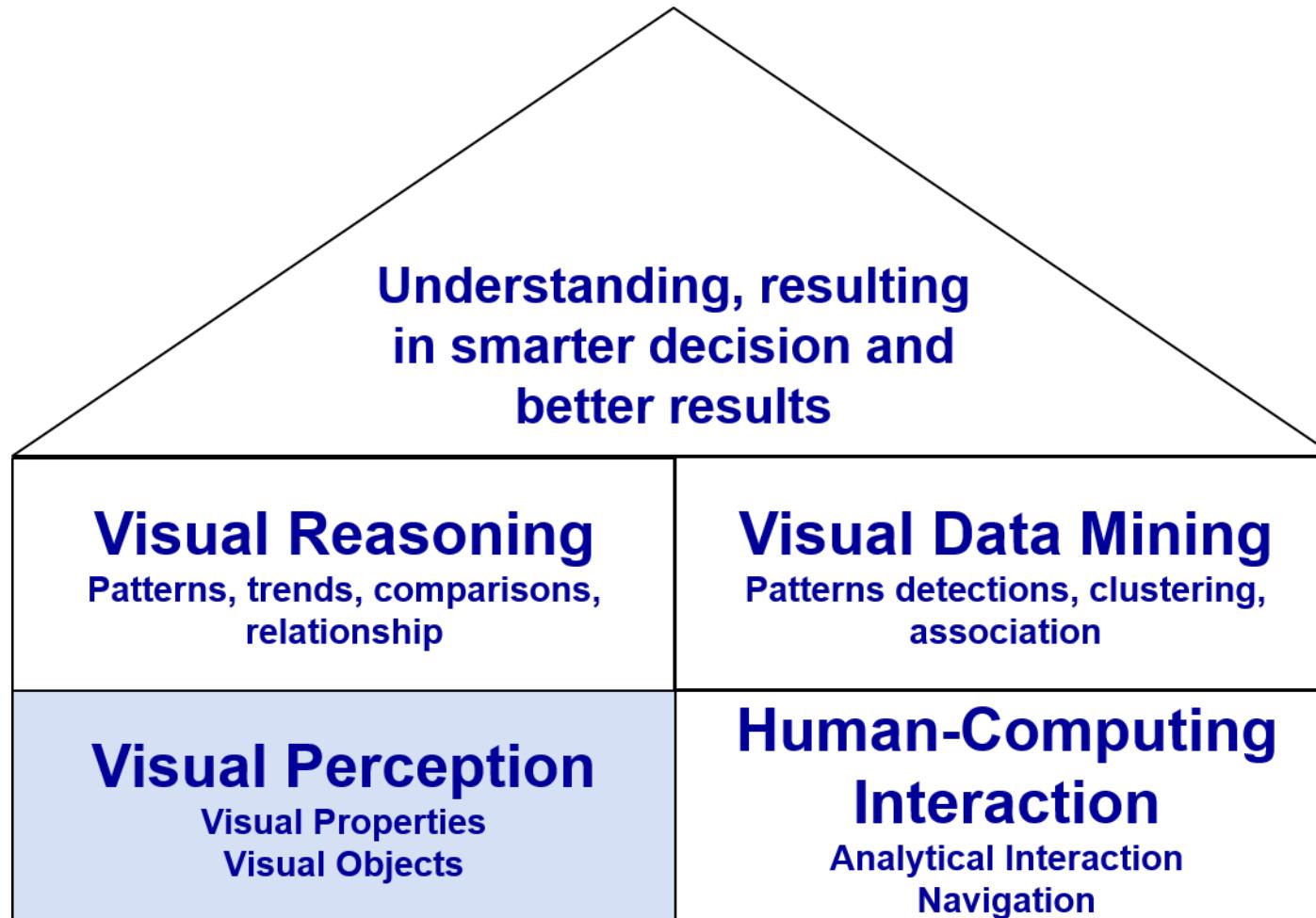
**School of Information Systems,
Singapore Management University**

2019-04-28 (updated: 2021-05-12)

What will you learn from this lesson?

- Human perception and information processing
- Perceptual and design principles for effective visual analytics
- Principles of Graphic Design
 - Rules for Encoding Values in Graph
 - JunkCharts
 - Practical Guides for Using Colour in Charts
 - Data-ink

Building Block of Visual Analytics



Data visualisation design process

- Start with a clear message
- Search for appropriate data
- Prepare the data
- Use the right graph type
- Express and explain
- Review and seek feedback from experts and casual readers

DataViz design process

Data Management

Select data source

Clean data

Categorise data

Moderate data

Visualisation

Information design

Visual encoding

Interface design

Visual Analytics

Observations

Hypothesis

Evidence (+/-)

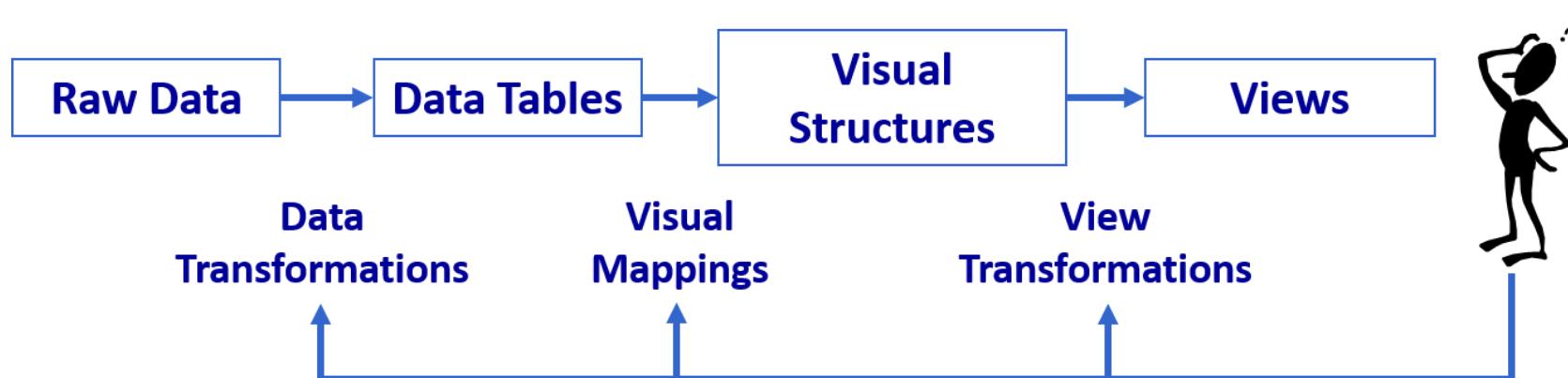
Summarise

Communicate

Data

Visual Form

Task



The Devil is in the Data

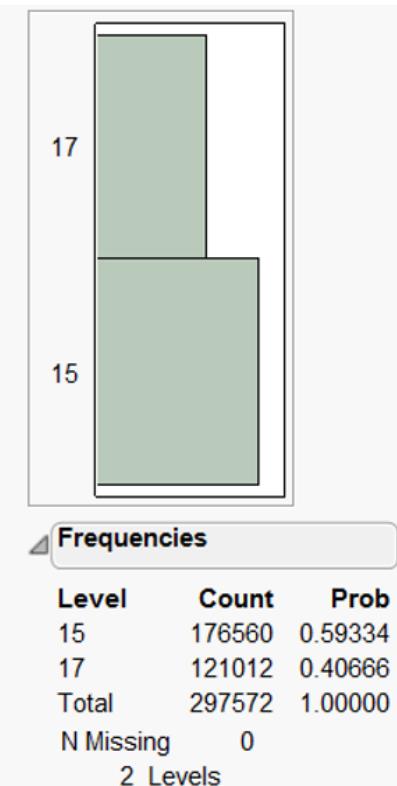
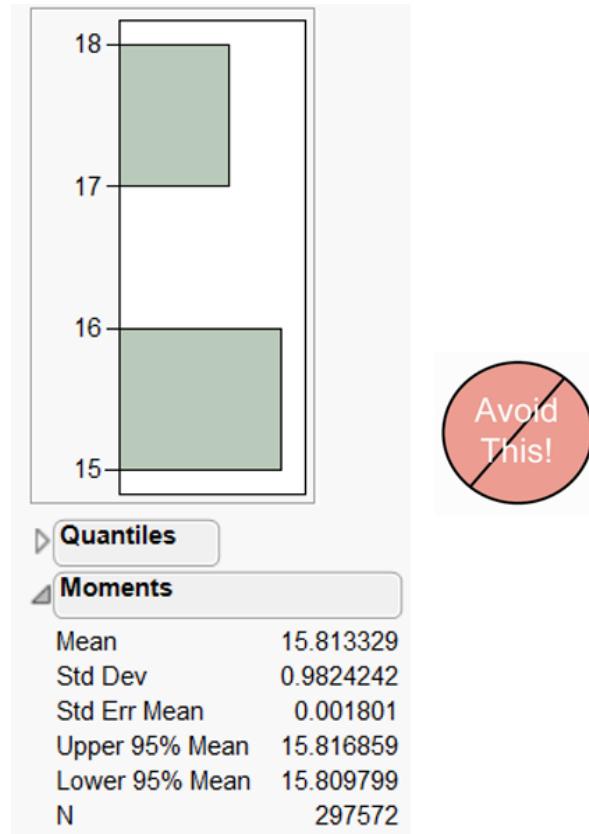


Numbers Worth Knowing

- Categorical data: numbers that summarise (i.e. sex, property type, planning region)
 - nominal, ordinal, interval, hierarchical
 - time series
- Continuous data: numbers that measure (i.e. unit price, age, monthly salary)
 - ranking, ratio

Data Understanding

- Avoid garbage in, garbage out problem. For example, display size should be classified as categorical instead of continuous.

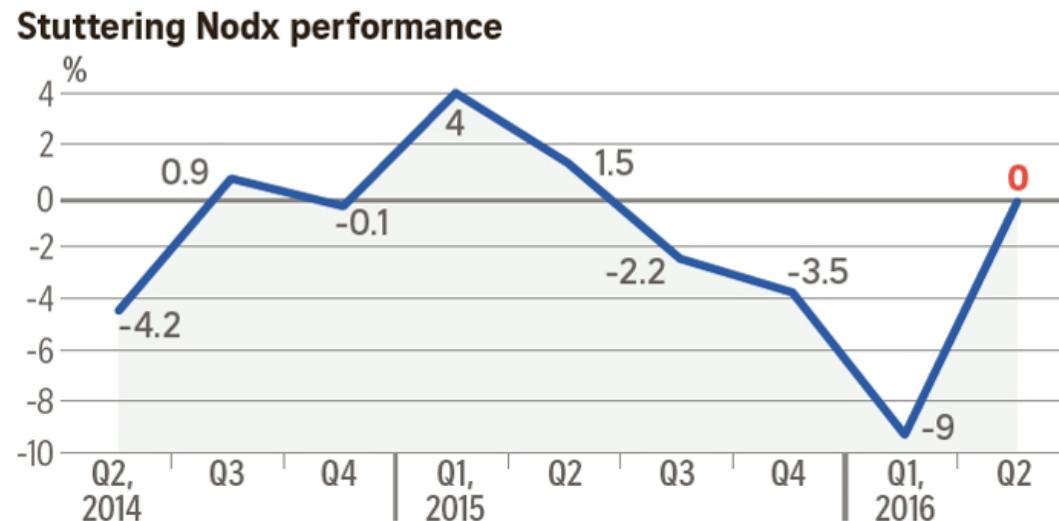


Graphical Integrity: Show Me the Truth

- Don't lie to yourself (or to others) with charts

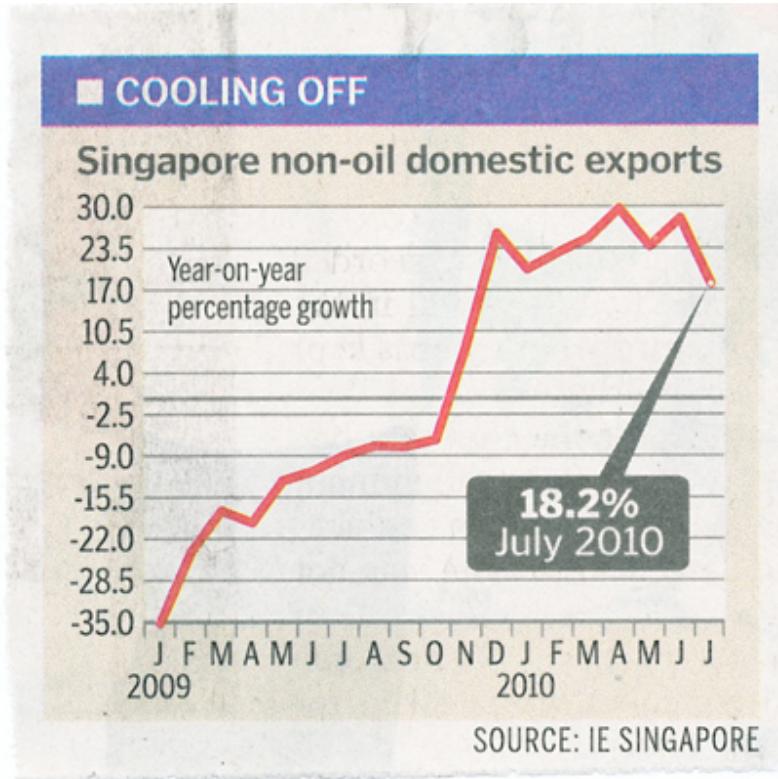


Non-oil domestic exports (Nodx) growth was flat in the second quarter. For the first half this year, **Nodx fell 4.5 per cent** compared with the same period last year.

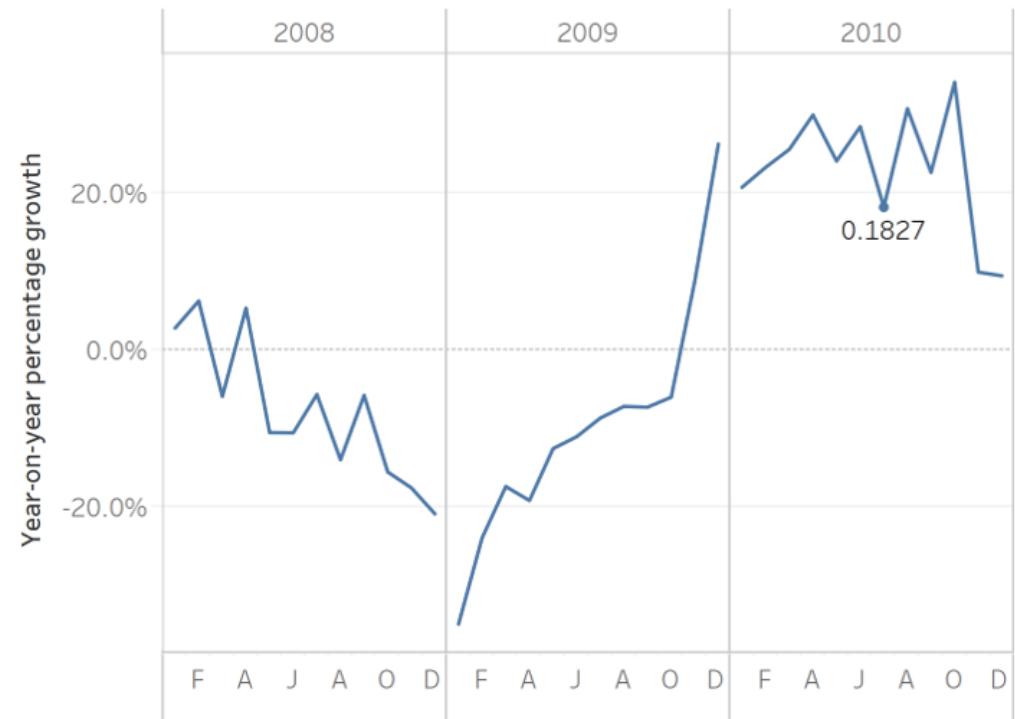


Graphical Integrity: Show Me the Truth

- Snapshot can be misleading!

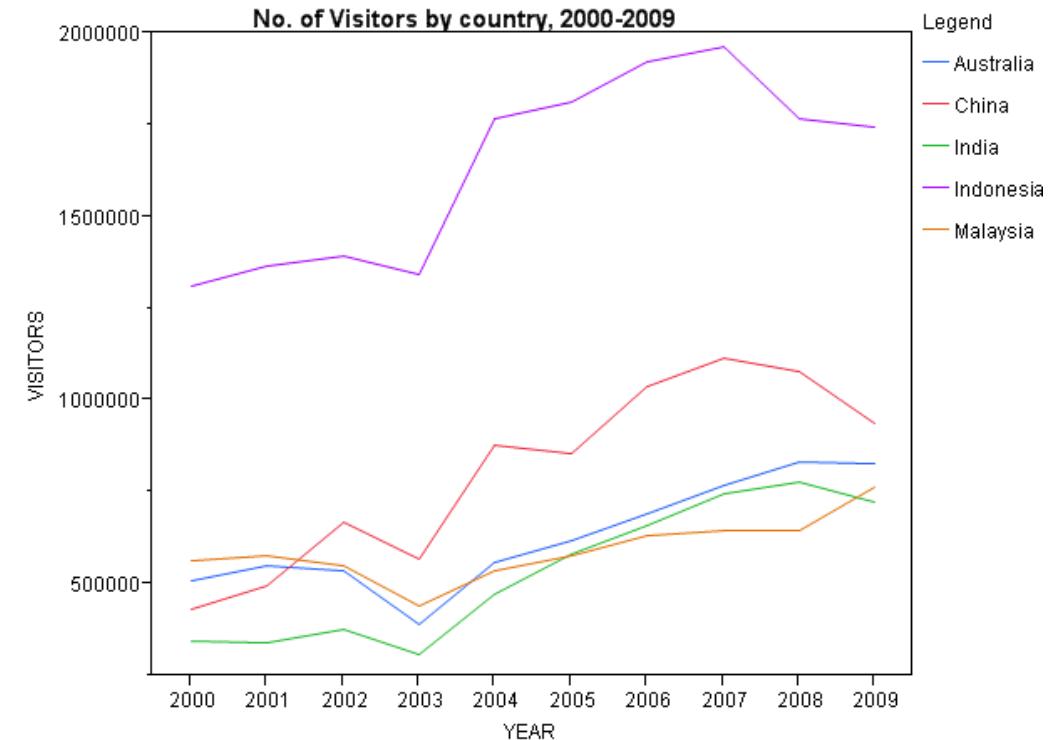
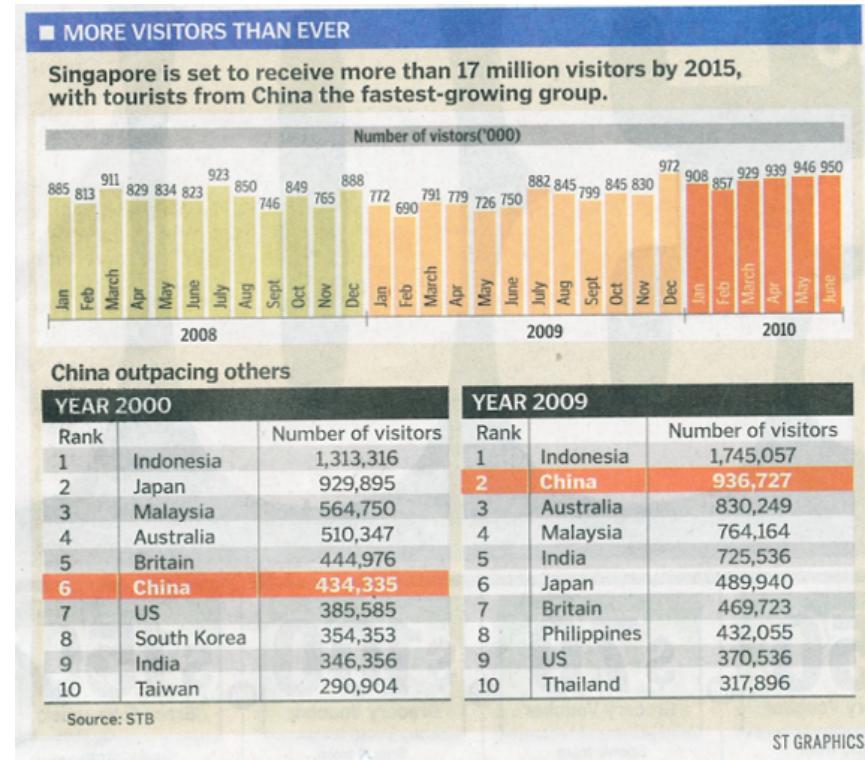


Singapore non-oil domestic export, 2008-2010



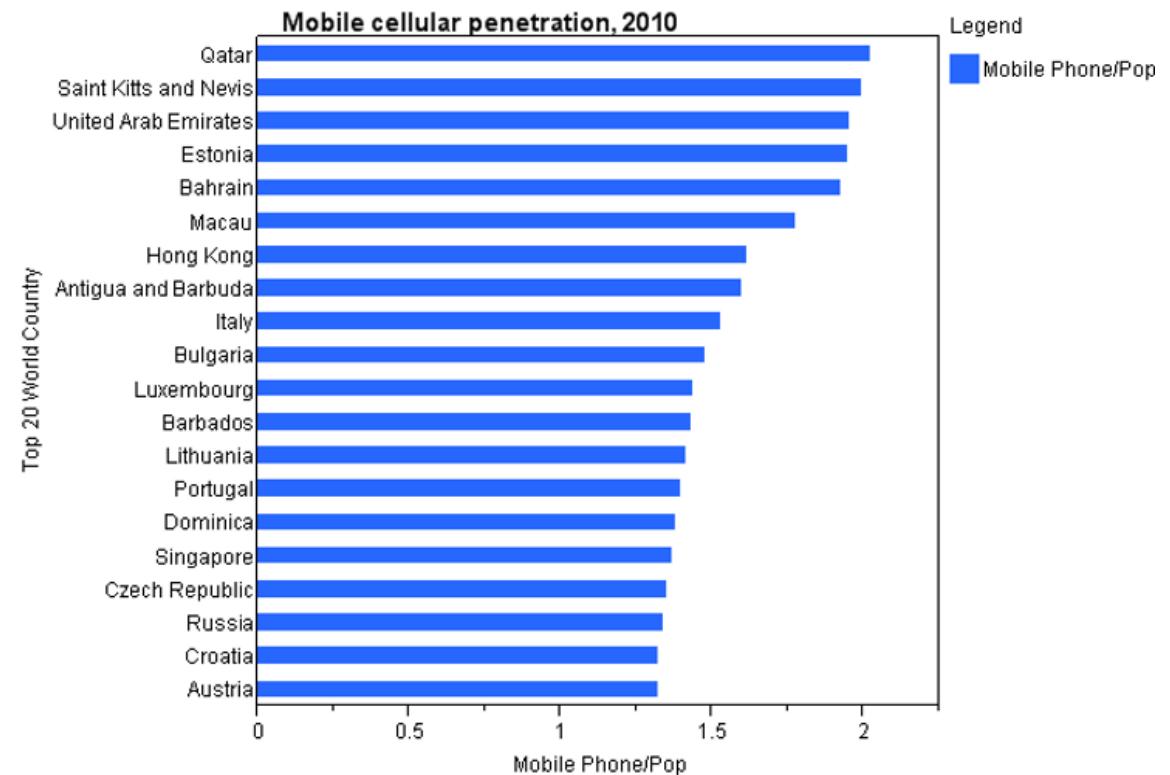
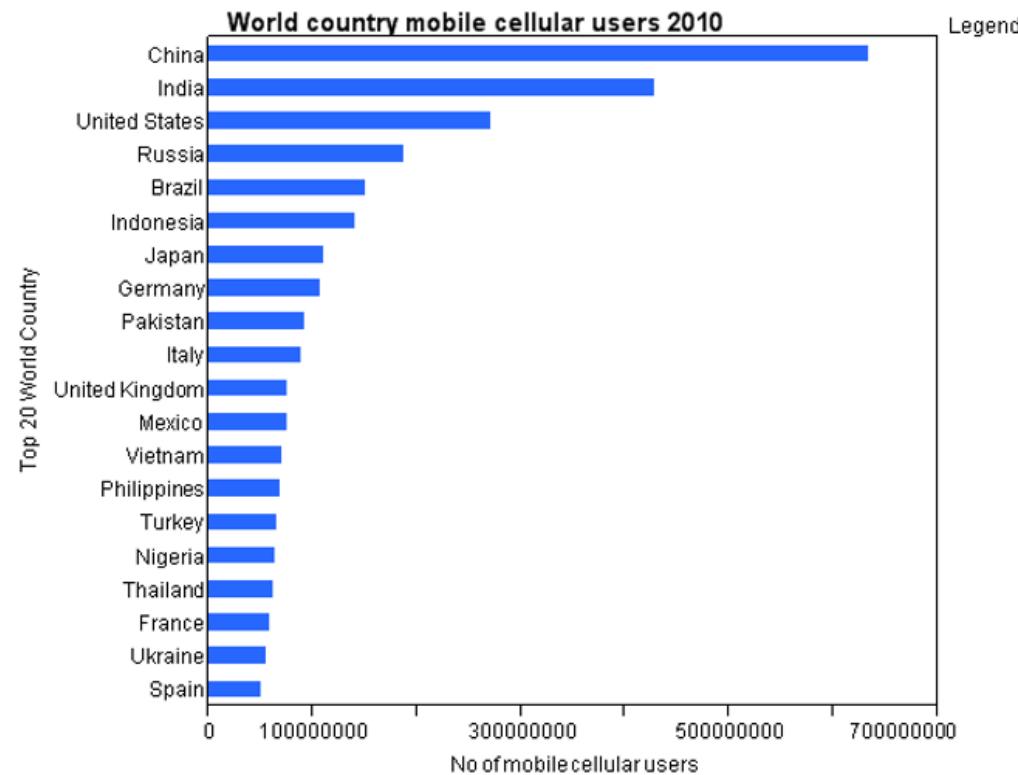
Graphical Integrity: Show Me the Truth

- Do not miss-out what had happened in between.



Graphical Integrity: Show Me the Truth

- Sometimes, data need to be transformed.

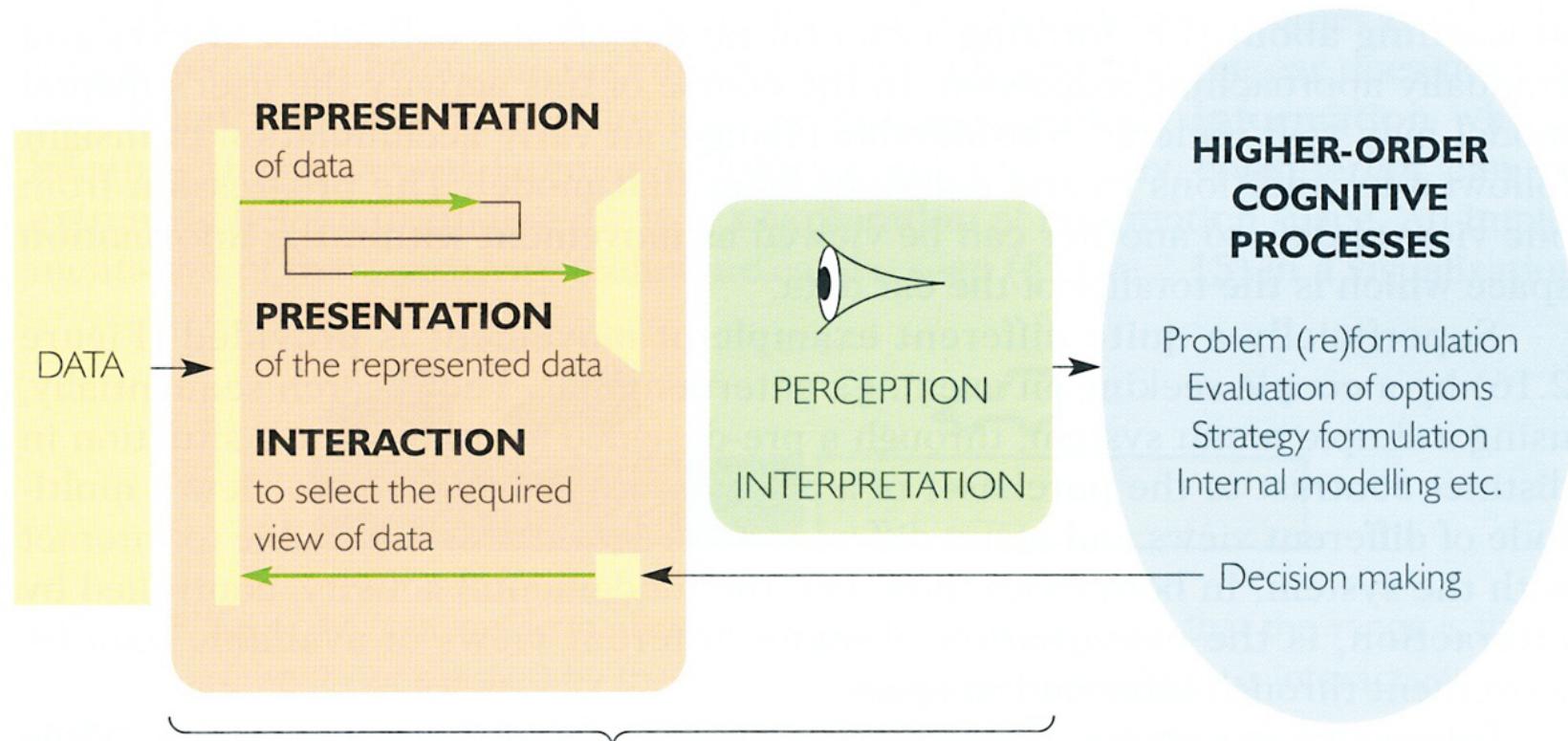


Graphical Integrity: Show me the truth

Designing graph to enlighten people – not to entertain them



Human Perception and Information Processing



Pre-attentive Processing

- A limited set of visual properties are processed preattentively (without need for focusing attention).
- This is important for design of visualizations
 - What can be perceived immediately?
 - Which properties are good discriminators?
 - What can mislead viewers?

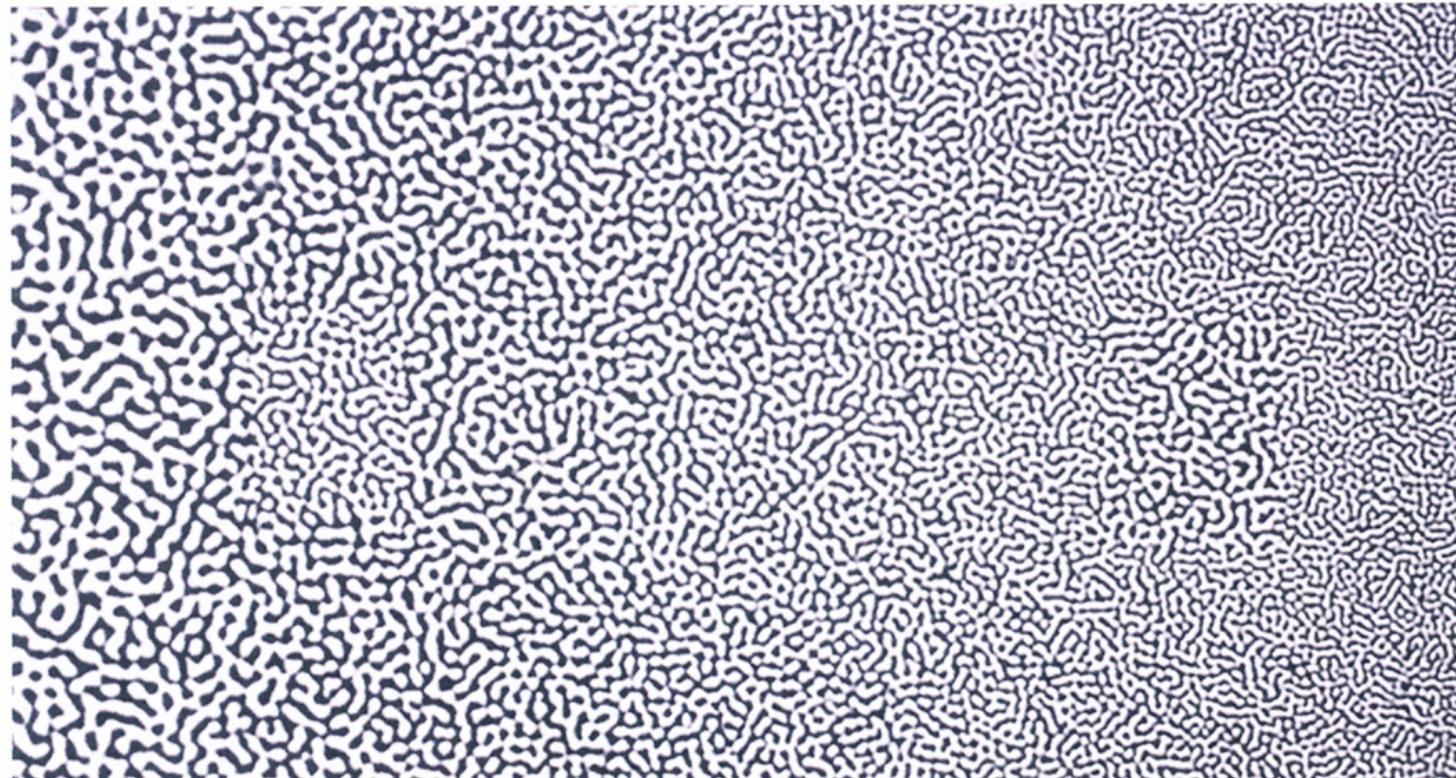
How Visual Sensing Works?

Fact 1: We see what we know and expect.



How Visual Sensing Works?

Fact 2: We do not attend to everything we see.



How Visual Sensing Works?

Fact 3: We don't remember everything we see



How Visual Sensing Works?

Fact 3: We don't remember everything we see



QW

How Many 3's?

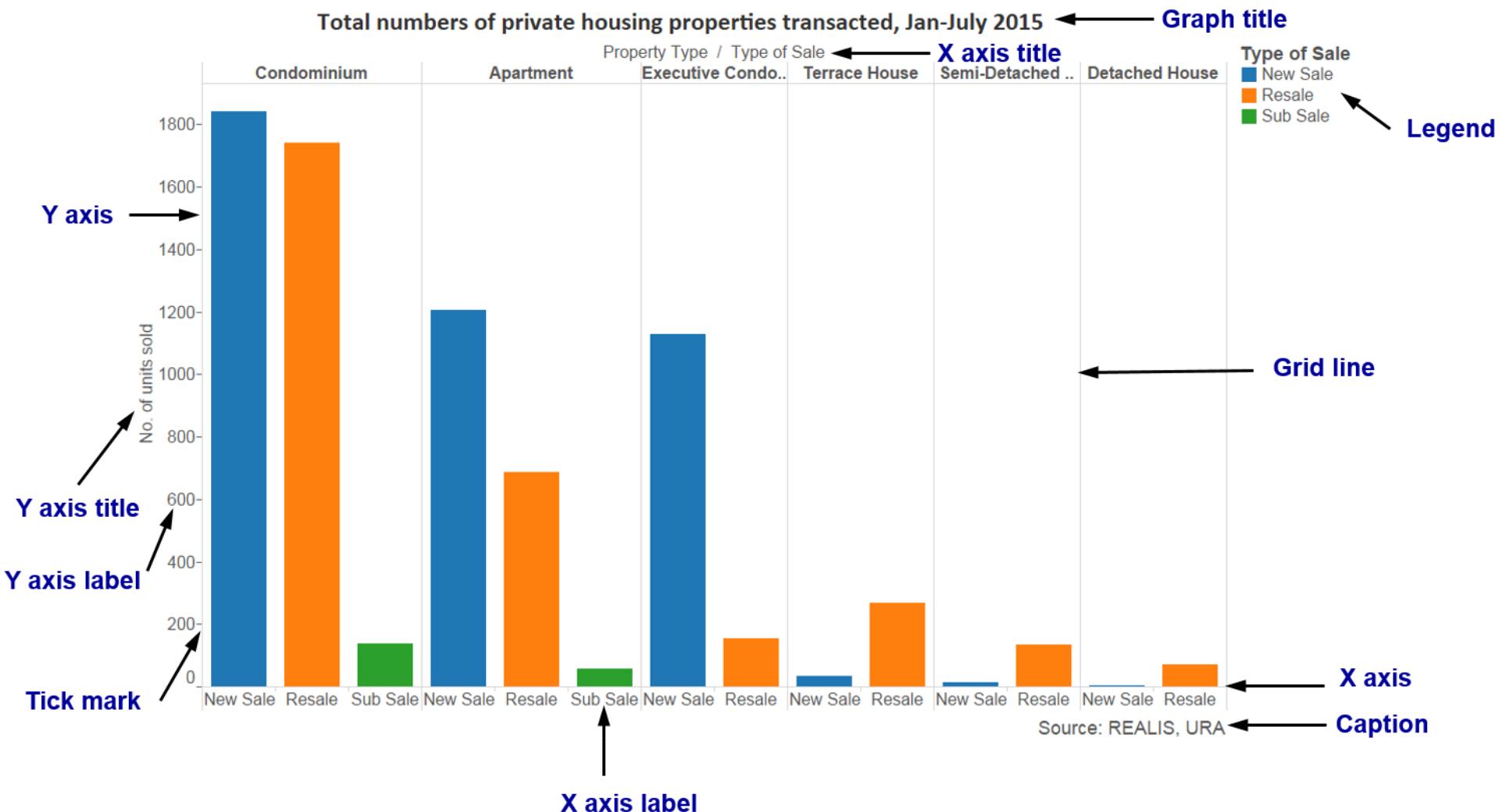
**1281768756138976546984506985604982826762
9809858458224509856458945098450980943585
90910302099059595772564675050678904567
8845789809821677654876364908560912949686**

QW

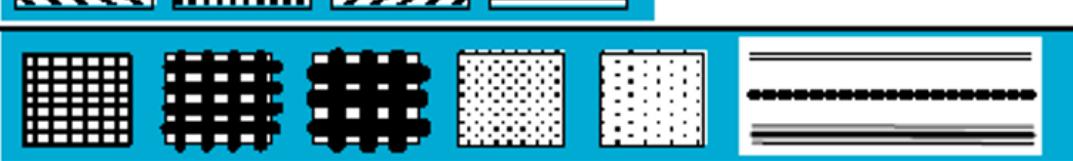
How Many 3's?

12817687561**3**8976546984506985604982826762
980985845822450985645894509845098094**3**585
90910**3**02099059595772564675050678904567
8845789809821677654876**3**64908560912949686

Components of a graph



Bertin's Semiology of graphics

Bertin's Original Visual Variables	
Position changes in the x, y location	
Size change in length, area or repetition	
Shape infinite number of shapes	
Value changes from light to dark	
Colour changes in hue at a given value	
Orientation changes in alignment	
Texture variation in 'grain'	



Jacques Bertin

Grammar of a language

- Grammar of a language defines the rules of structuring words and phrases into meaningful expressions.

The quick brown fox jumps over
the lazy dog

Article The

Adjective quick brown

Noun fox

Verb jumps

Preposition over

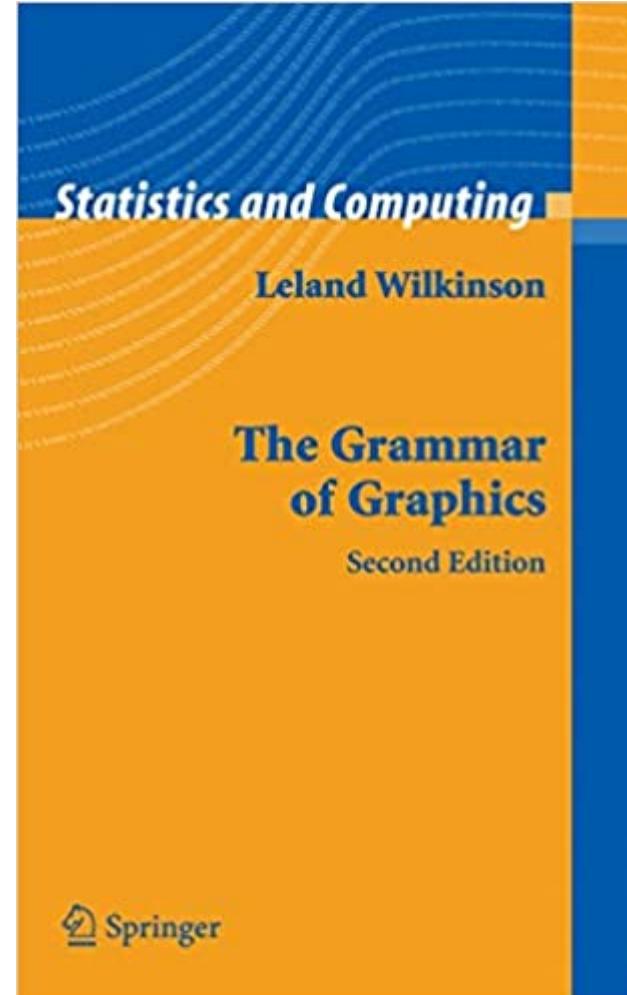
Article the

Adjective lazy

Noun dog.

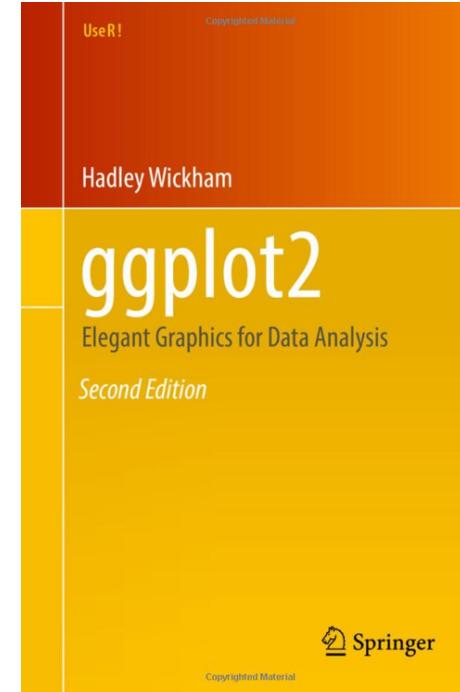
The Grammar of Graphics

- The grammar of graphics is an answer to a question: What is a statistical graphic?
- Grammar of graphics defines the rules of structuring mathematic and aesthetic elements into a meaningful graph.
- Two principles:
 - Graphics = distinct layers of grammatical elements
 - Meaningful plots through aesthetic mapping



A Layered Grammar of Graphics

Design principles of ggplot2 r package



Design principles for effective visual presentation

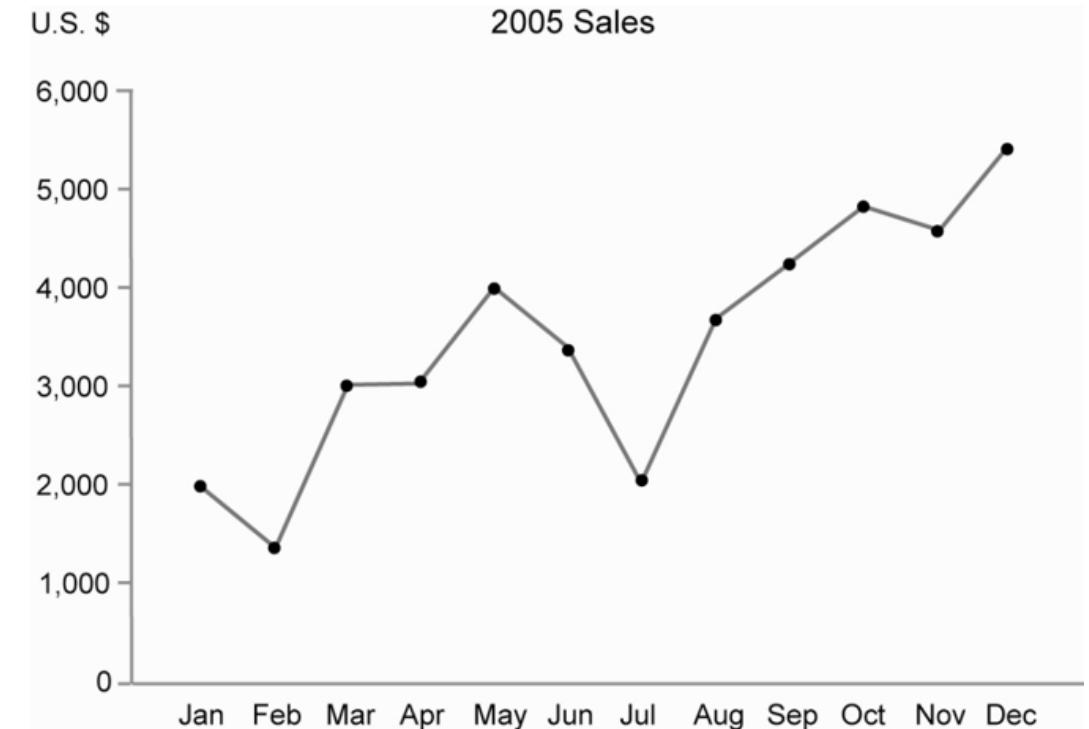
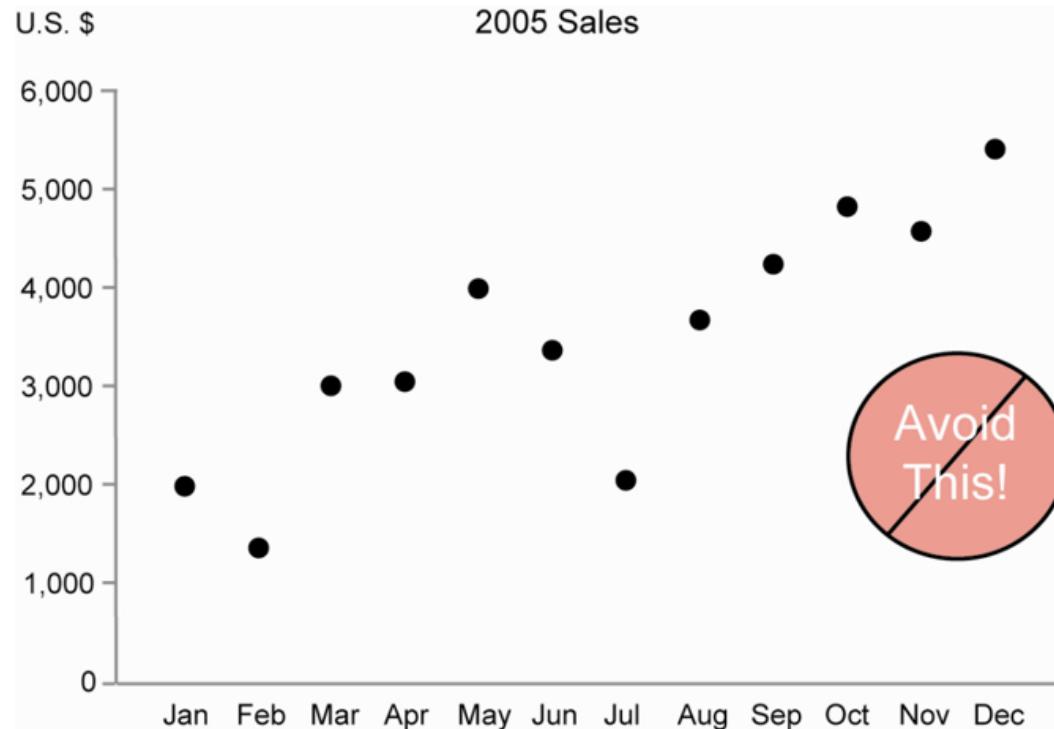
- Rules for Encoding Values in Graph
- JunkCharts
- Practical Guides for Using Colour in Charts
- Data-ink

Design principles for effective visual presentation

- Rules for Encoding Values in Graph
- JunkCharts
- Practical Guides for Using Colour in Charts
- Data-ink

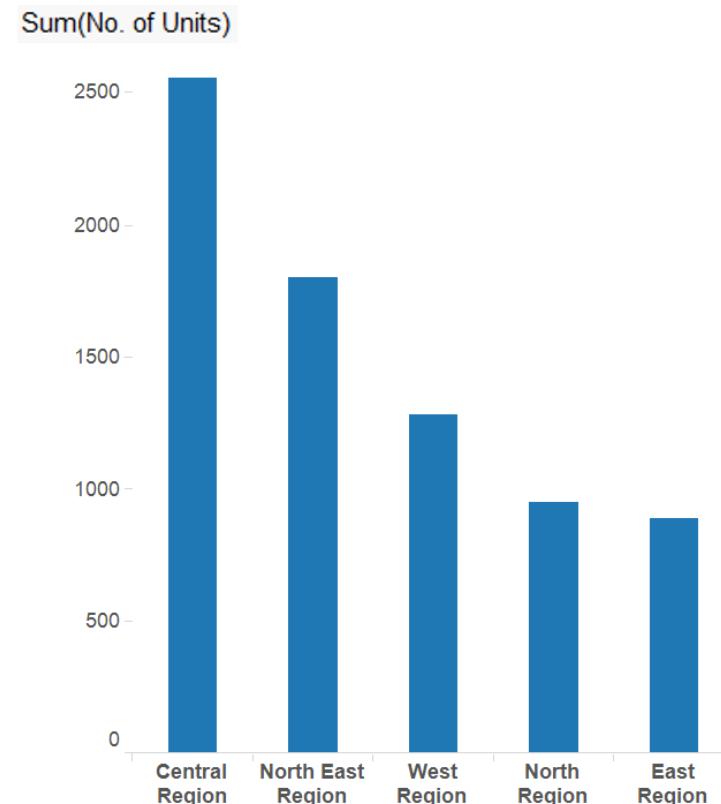
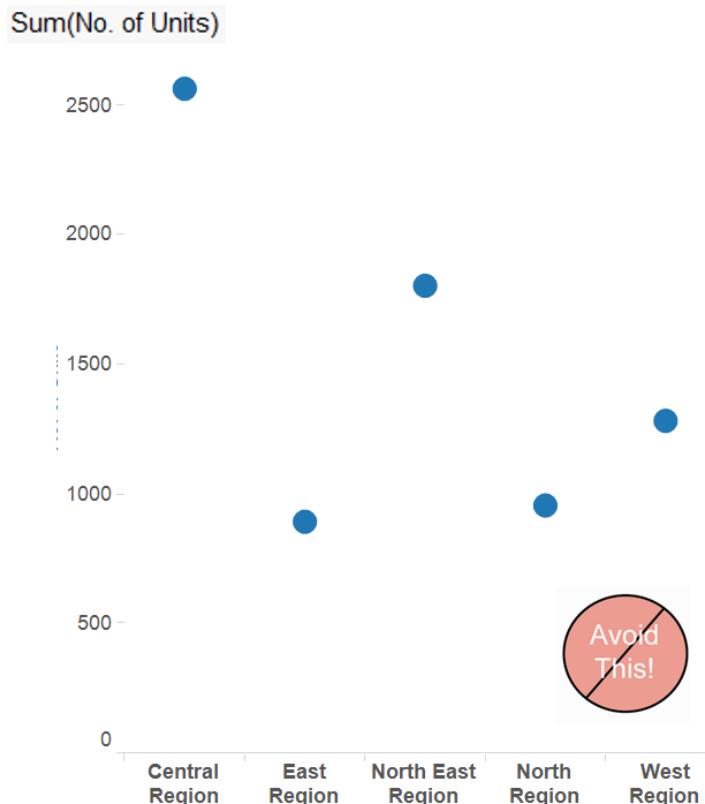
Rules for Encoding Values in Graph

Rule 1: Avoid using point alone to display time-series data



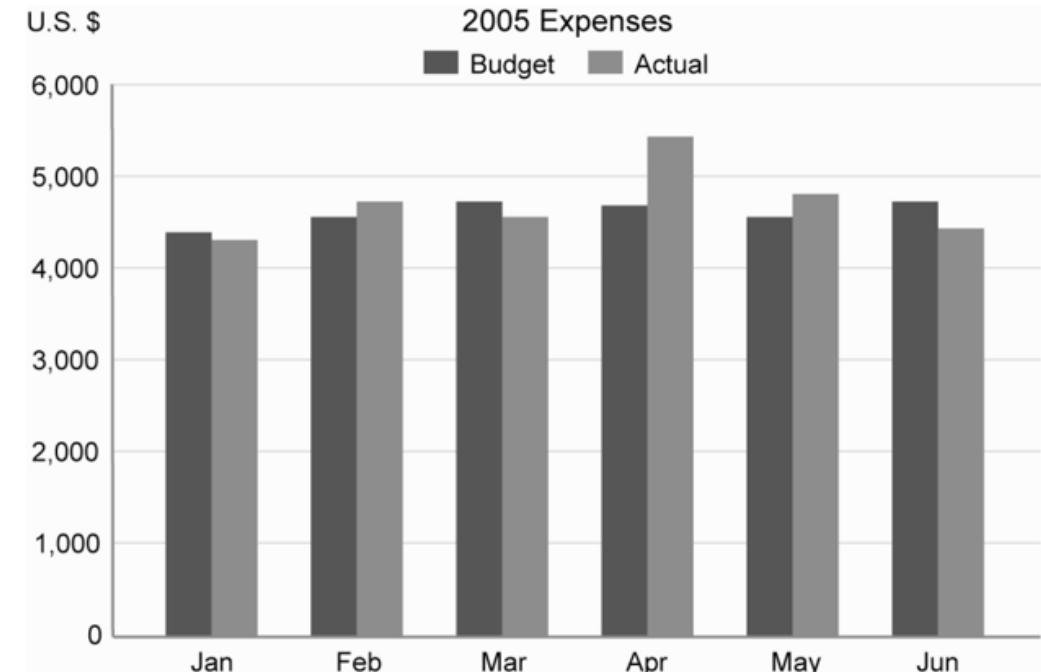
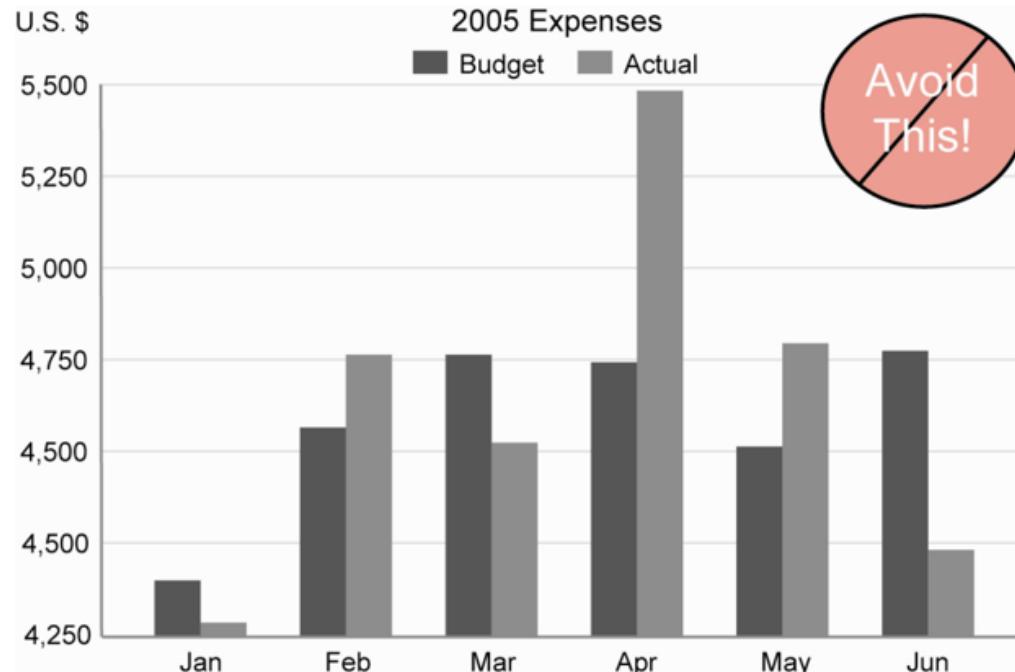
Rules for Encoding Values in Graph

Rule 2: Avoid using points to represent discrete values



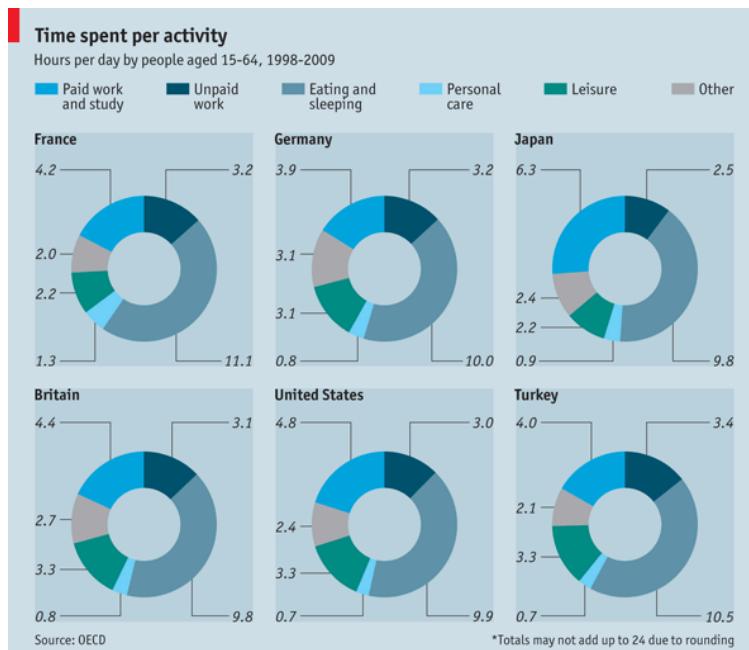
Rules for Encoding Values in Graph

Rule 3: Bars don't work unless the quantitative scale begins at zero

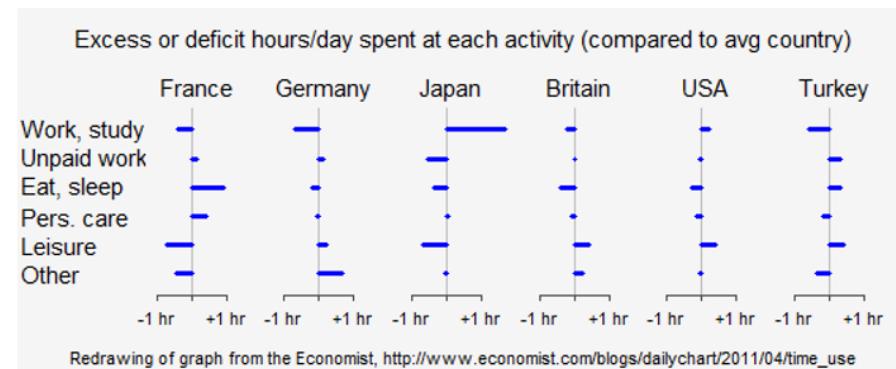


Rule for Encoding Values in Graph

Rule 4: Avoid pie chart if possible because our eyes are not good in reading areas



Source: Time use: A day in the life,
Apr 19th 2011, 15:00 by The Economist online



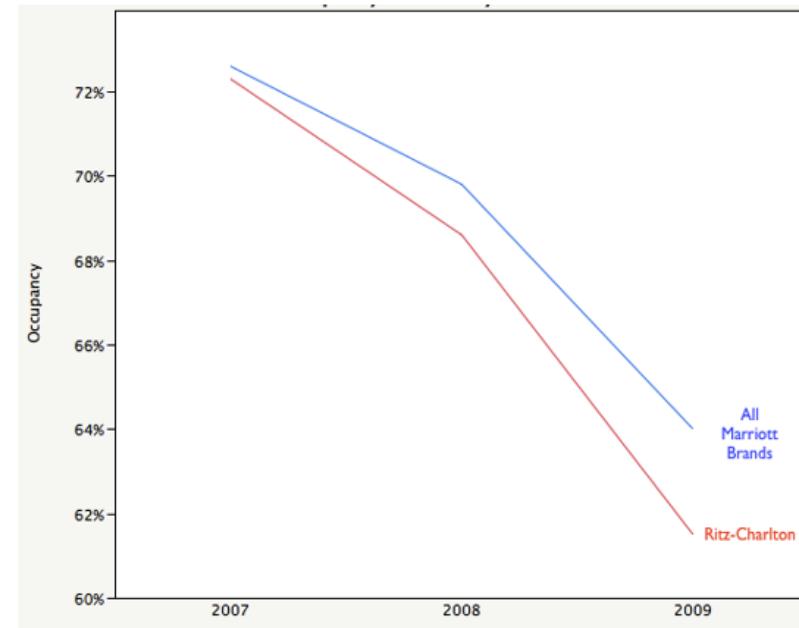
Rule for Encoding Values in Graph

Rule 5: Avoid pie chart if you are comparing changes over time



Avoid This!

The Ritz-Carlton Brand Was Hit Worse Than Other Marriott Brands During the Downturn



Design principles for effective visual presentation

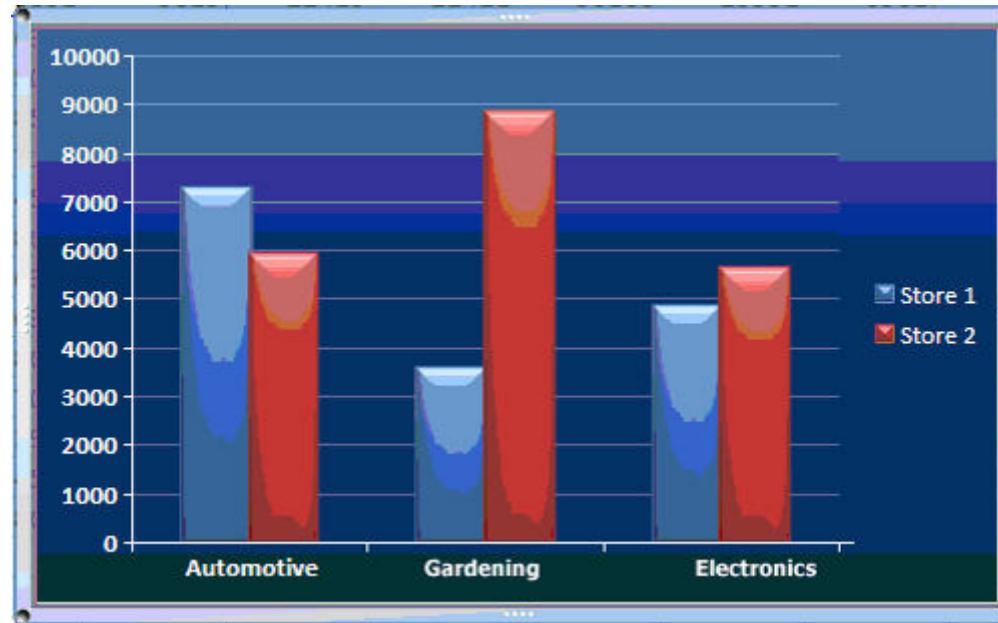
- Rules for Encoding Values in Graph
- **JunkCharts**
- Practical Guides for Using Colour in Charts
- Data-ink

What is ChartJunk?

- Chartjunk refers to all visual elements in charts and graphs that are not necessary to comprehend the information represented on the graph, or that distract the viewer from this information.
- It was first introduced by Edward Tufte in his 1983 book *The Visual Display of Quantitative Information*.
- There is an interesting blog called [Junk Charts](#) by Kaiser Fung.

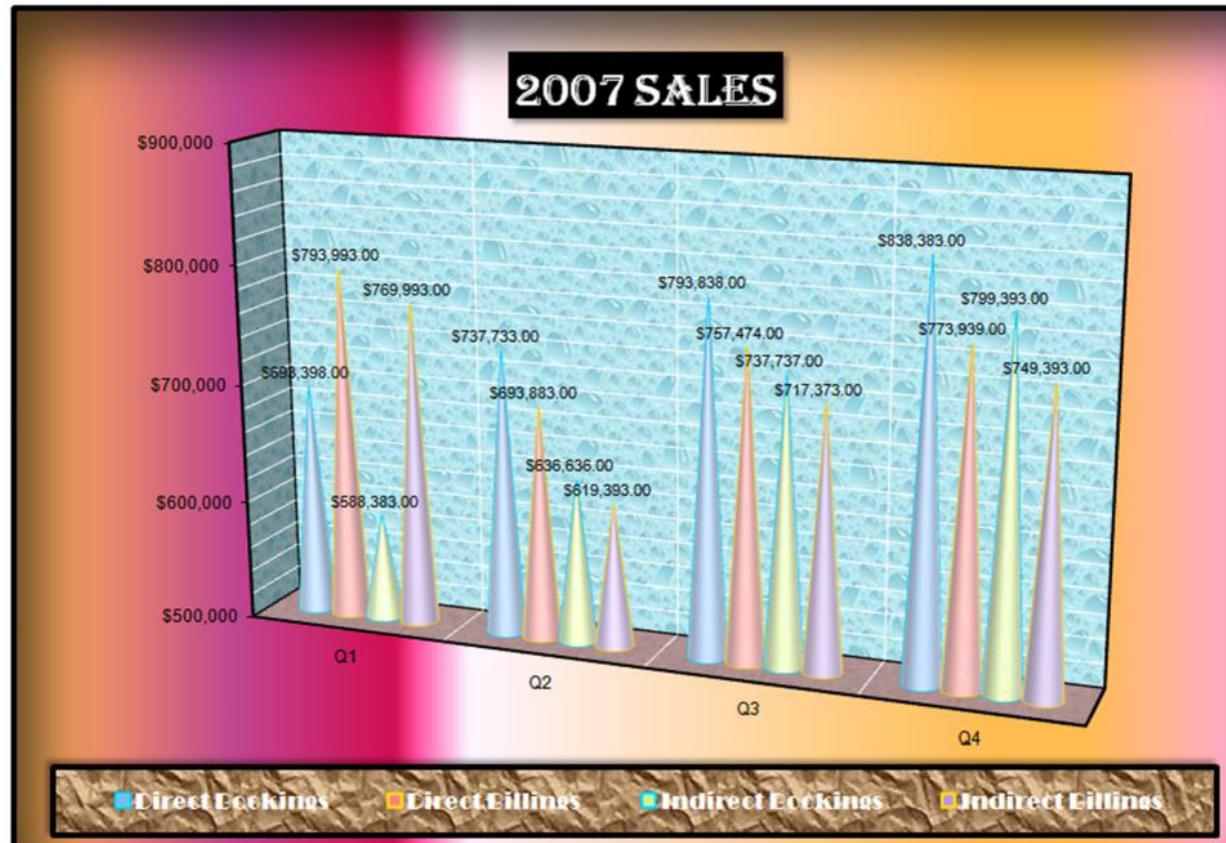
ChartJunk I

- Avoid using unnecessary colour shading for the bar



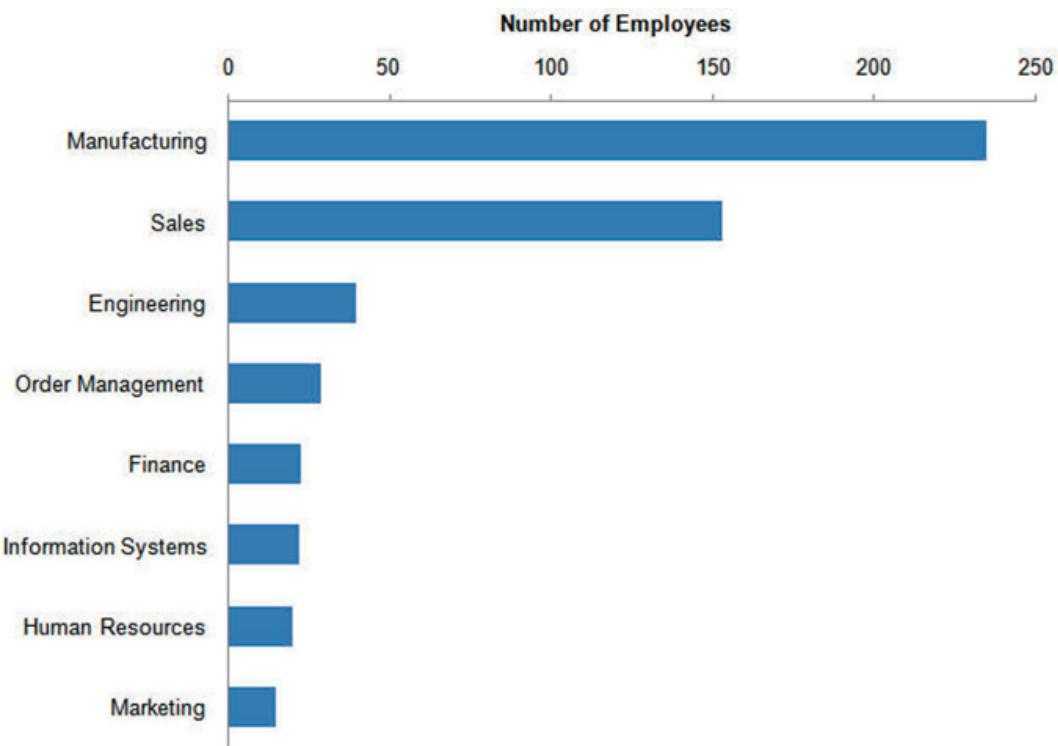
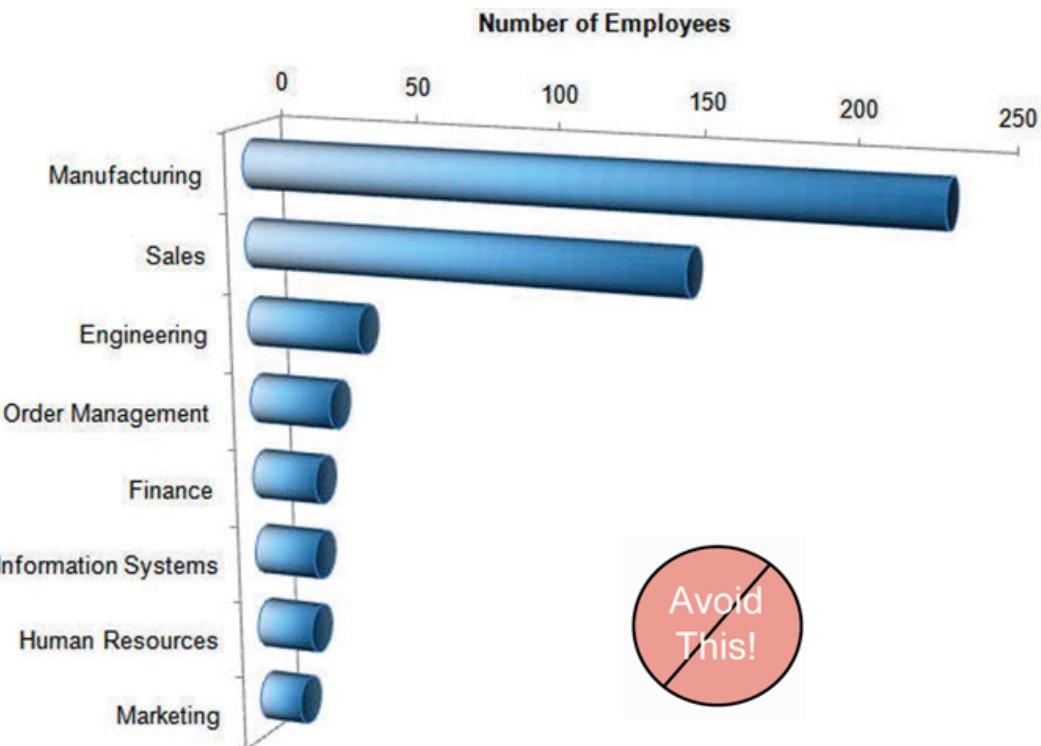
ChartJunk II

Avoid colourful or wallpaper background



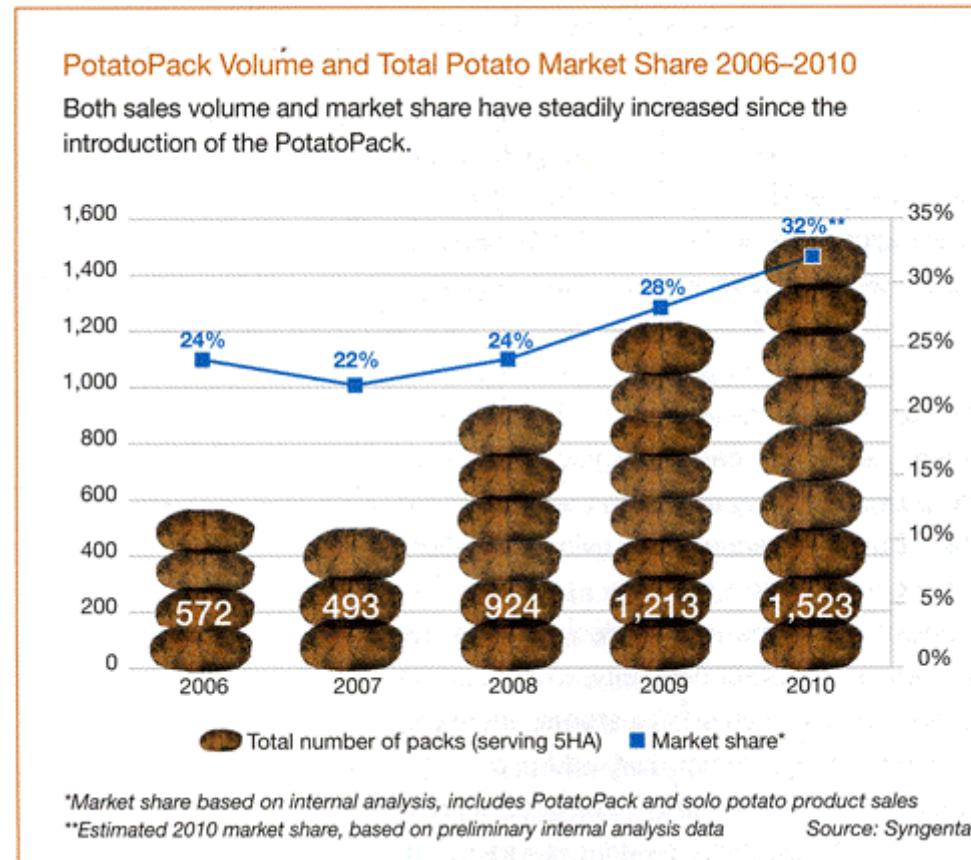
ChartJunk III

Avoid using 3D effects in graphics



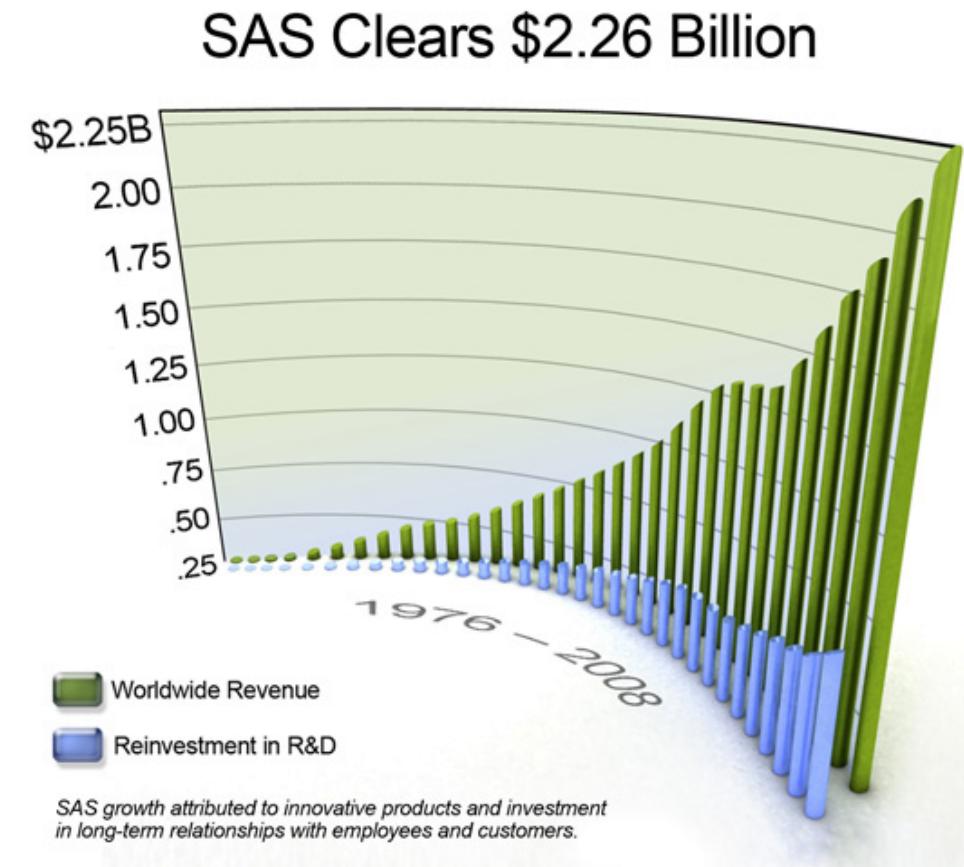
ChartJunk IV

Avoid using misleading graphical representation



ChartJunk V

Avoid using artistic design which is difficult to visualise

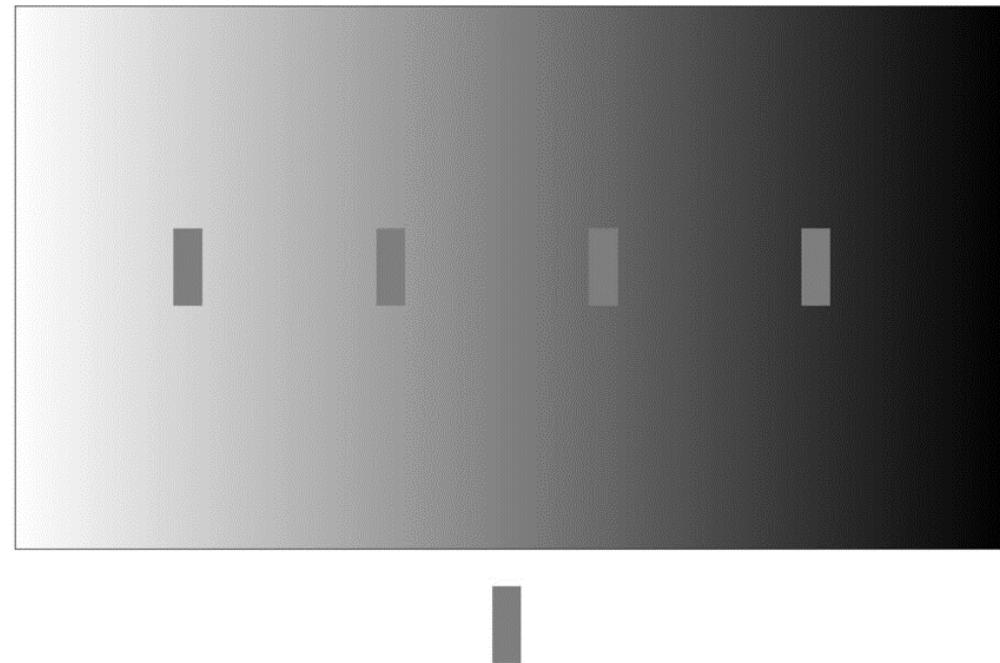


Design principles for effective visual presentation

- Rules for Encoding Values in Graph
- JunkCharts
- **Practical Guides for Using Colour in Charts**
- Data-ink

Practical Guides for Using Colour in Charts

Rule 1: If you want different objects of the same colour in a graph to look the same, make sure that the background- the colour that surrounds them – is consistent.



Practical Guides for Using Colour in Charts

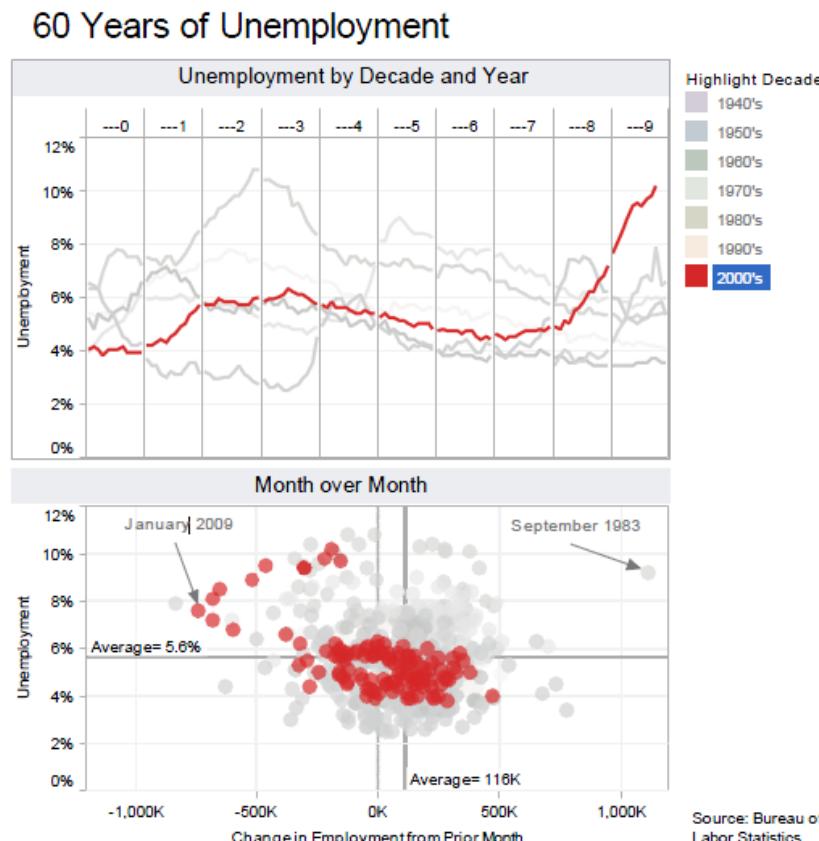
Rule 2: If you want objects in a graph to be easily seen, use a background colour that contrasts sufficiently with the object.

name	age	sex	height	weight
KATIE				
LOUISE				
JANE				
JACLYN				
LILLIE				
TIM				
JAMES				
ROBERT				
BARBARA				
ALICE				
SUSAN				
JOHN				
JOE				
MICHAEL				
DAVID				
JUDY				
ELIZABETH				
LESLIE				
CAROL				
PATTY				
FREDERICK				
ALFRED				
HENRY				
LEWIS				
EDWARD				
CHRIS				
JEFFREY				
MARY				
AMY				
ROBERT				
WILLIAM				
CLAY				
MARK				
DANNY				
MARTHA				
MARION				
PHILLIP				
LINDA				
KIRK				
LAWRENCE				

	name	age	sex	height	weight	mean weight by age
1	KATIE	12	F	59	95	99.000
2	LOUISE	12	F	61	123	99.000
3	JANE	12	F	55	74	99.000
4	JACLYN	12	F	66	145	99.000
5	LILLIE	12	F	52	64	99.000
6	TIM	12	M	60	84	99.000
7	JAMES	12	M	61	128	99.000
8	ROBERT	12	M	51	79	99.000
9	BARBARA	13	F	60	112	94.714
10	ALICE	13	F	61	107	94.714
11	SUSAN	13	F	56	67	94.714
12	JOHN	13	M	65	98	94.714
13	JOE	13	M	63	105	94.714
14	MICHAEL	13	M	58	95	94.714
15	DAVID	13	M	59	79	94.714
16	JUDY	14	F	61	81	100.833
17	ELIZABETH	14	F	62	91	100.833
18	LESLIE	14	F	65	142	100.833
19	CAROL	14	F	63	84	100.833
20	PATTY	14	F	62	85	100.833
21	FREDERICK	14	M	63	93	100.833
22	ALFRED	14	M	64	99	100.833
23	HENRY	14	M	65	119	100.833
24	LEWIS	14	M	64	92	100.833
25	EDWARD	14	M	68	112	100.833
26	CHRIS	14	M	64	99	100.833
27	JEFFREY	14	M	69	113	100.833
28	MARY	15	F	62	92	108.286
29	AMY	15	F	64	112	108.286
30	ROBERT	15	M	67	128	108.286
31	WILLIAM	15	M	65	111	108.286

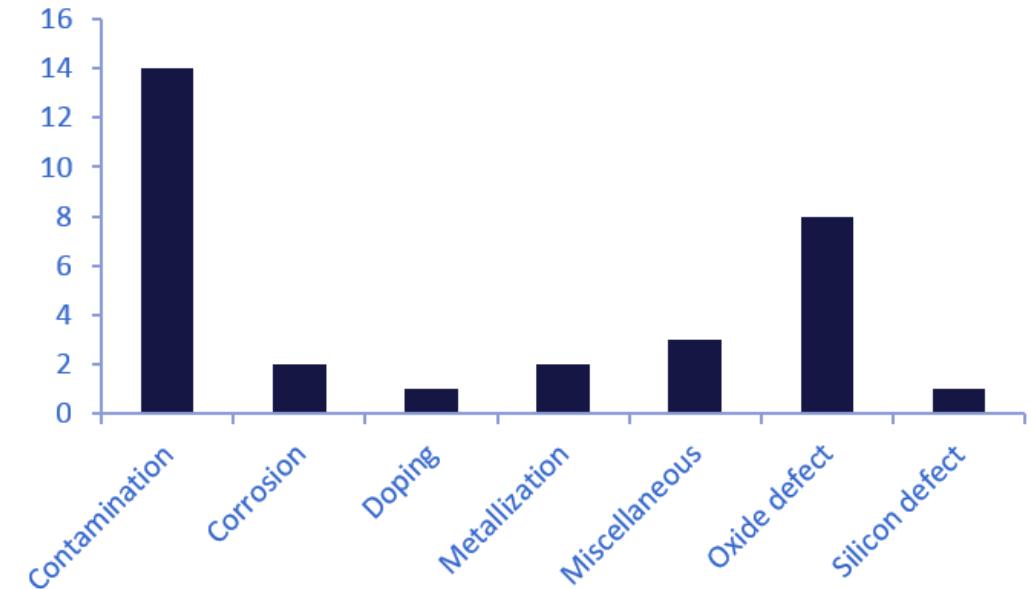
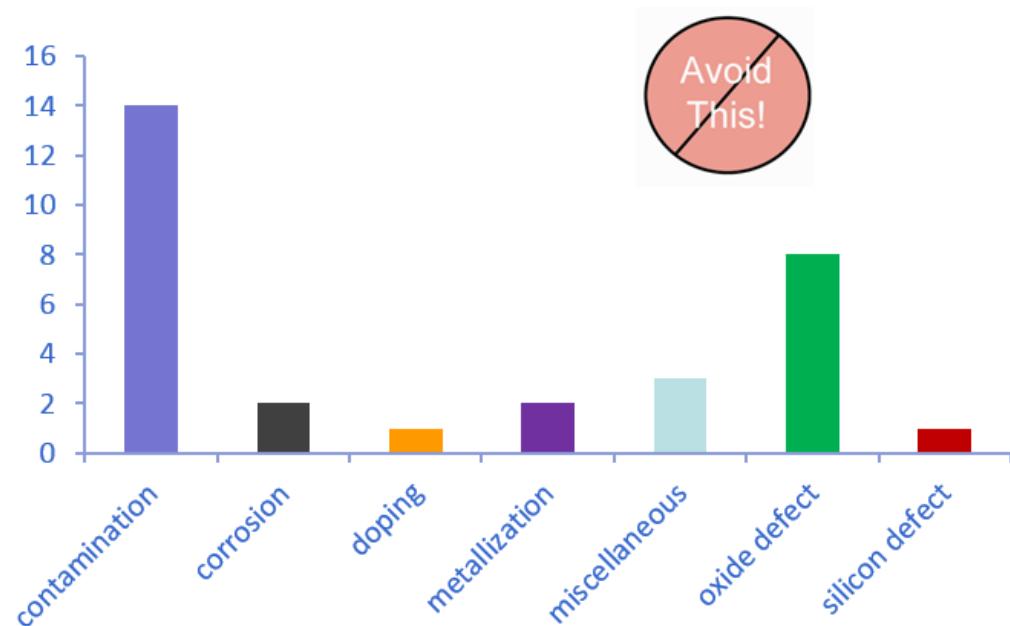
Practical Guides for Using Colour in Charts

Rule 3: Use color only when needed to serve a particular communication goal.



Practical Guides for Using Colour in Charts

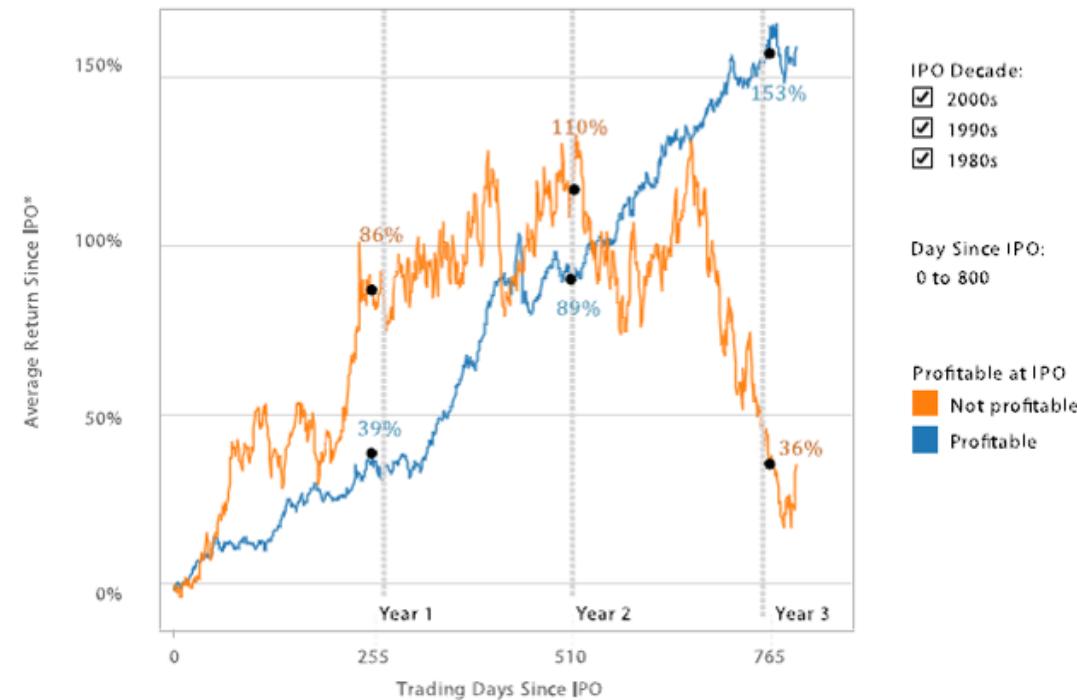
Rule 4: Use different colours when they correspond to differences of meaning in the data.



Practical Guides for Using Colour in Charts

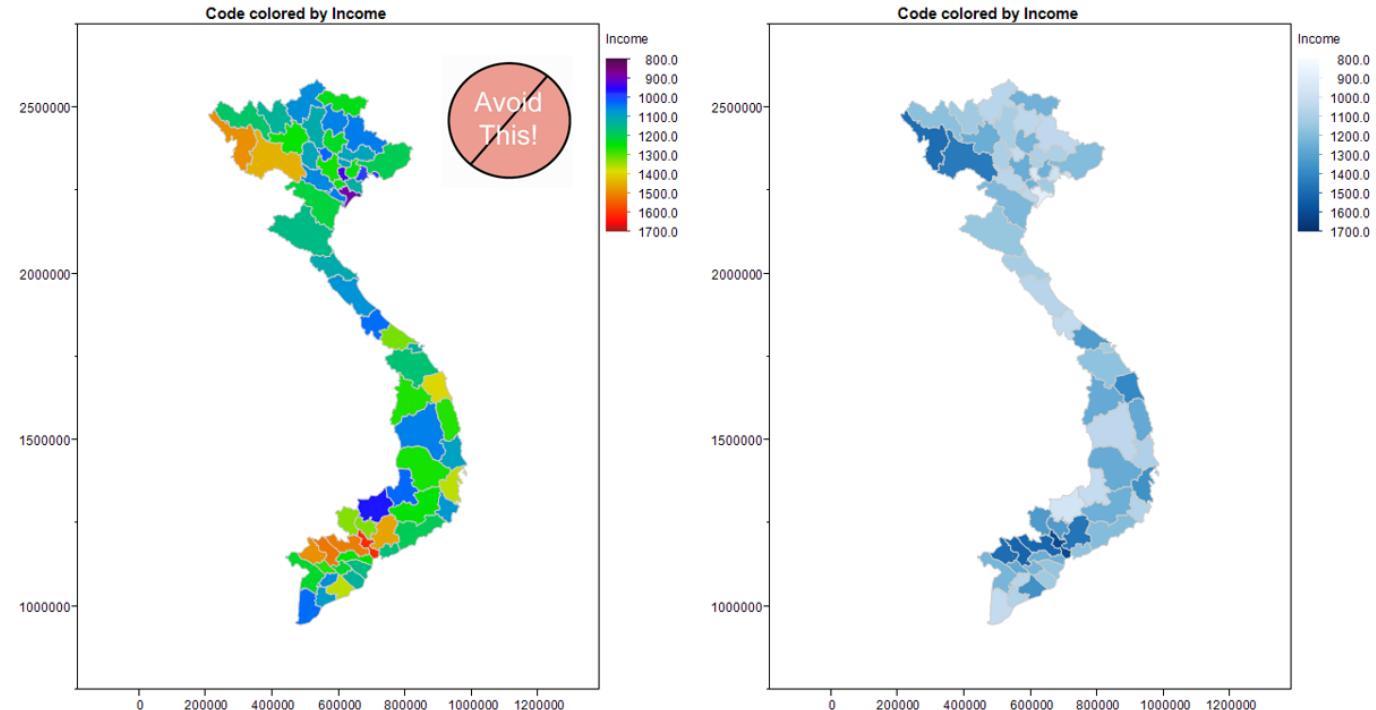
Rule 5: Use soft, natural colours to display most information and bright and/or dark colours to highlight information that requires greater attention.

Profitable vs. Unprofitable IPOs



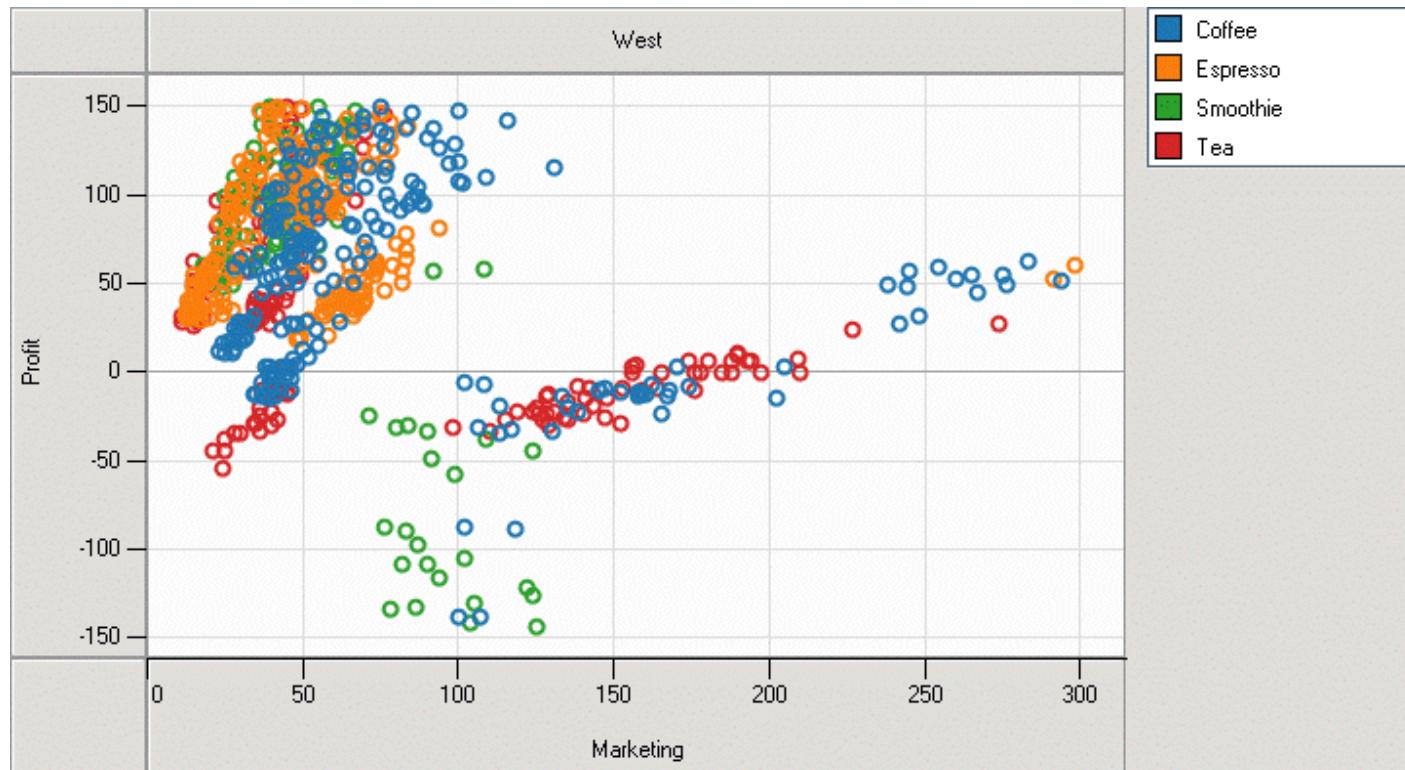
Practical Guides for Using Colour in Charts

Rule 6: When using colour to encode a sequential range of quantitative values, stick with a single hue (or a small set of closely related hues) and vary intensity from pale colours for low values to increasingly darker and brighter colours for high values.



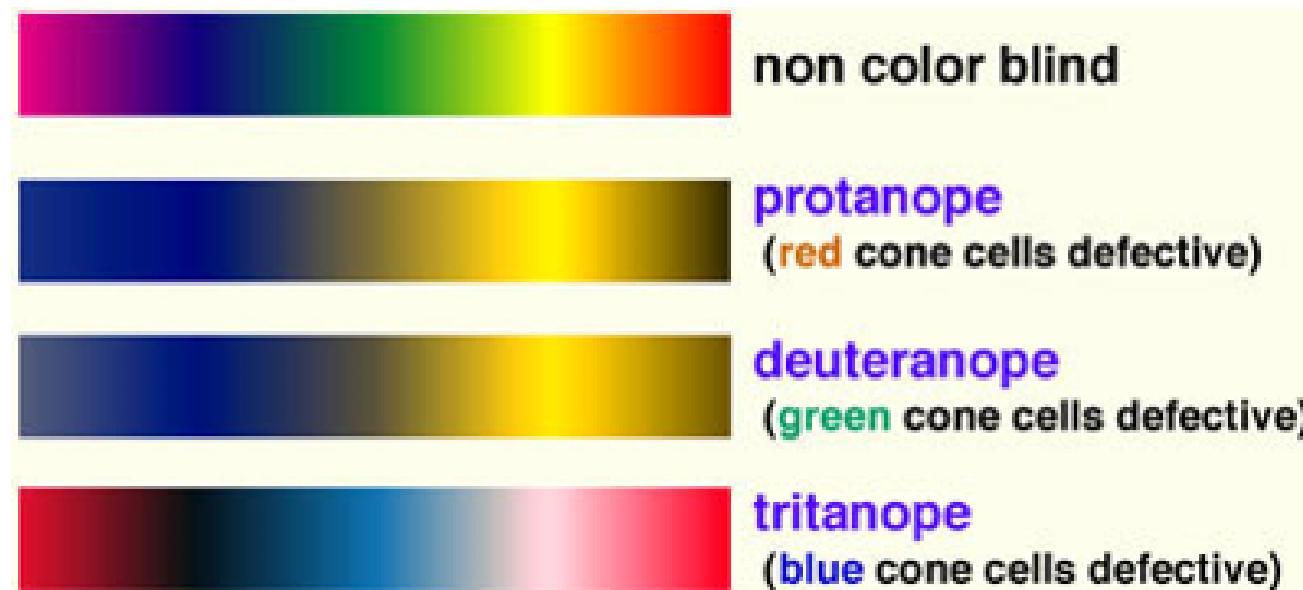
Practical Guides for Using Colour in Charts

Rule 7: Non-data components of a graph should be displayed just visibly enough to perform their role, but not more so, for excessive salience could cause them to distract attention from the data.



Practical Guides for Using Colour in Charts

Rule 8: To guarantee that most people who are colourblind can distinguish groups of data that are colour coded, avoid using a combination of red and green in the same display.



Design principles for effective visual presentation

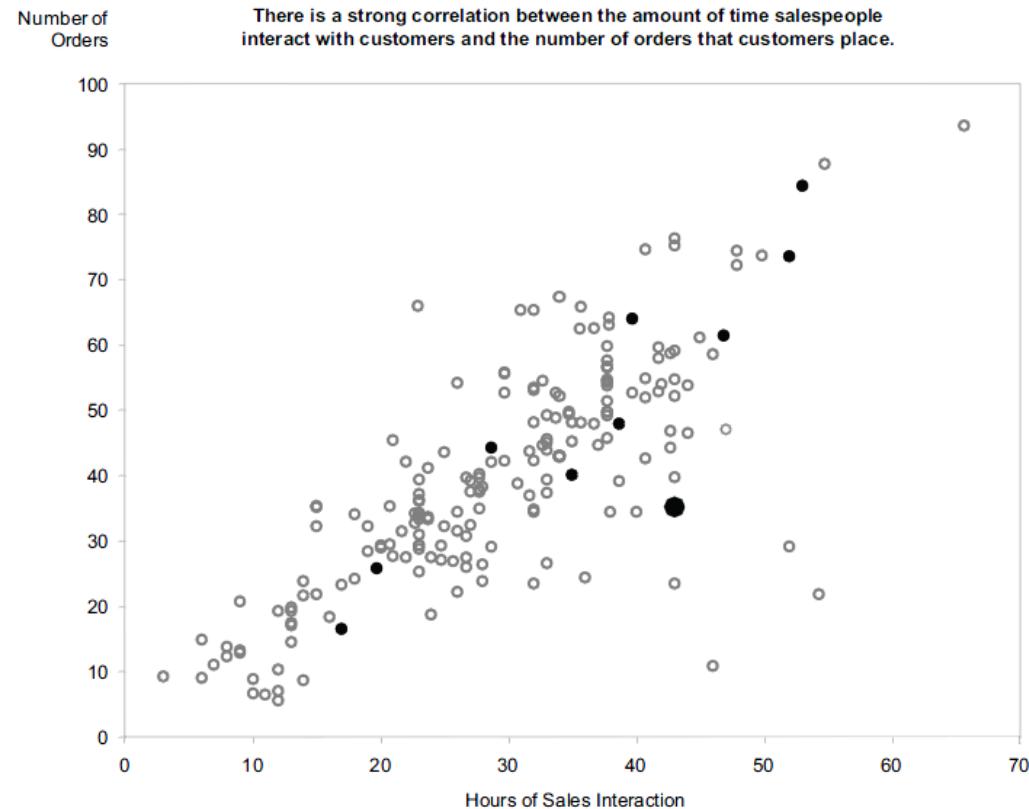
- Rules for Encoding Values in Graph
- JunkCharts
- Practical Guides for Using Colour in Charts
- **Data-ink**

Data-ink

- Reduce the non data-ink
 - Removed unnecessary non data-ink
 - De-emphasise or regularise the remaining non data-ink
- Enhance the data-ink
 - Remove unnecessary data-ink
 - Emphasise the remaining data-ink

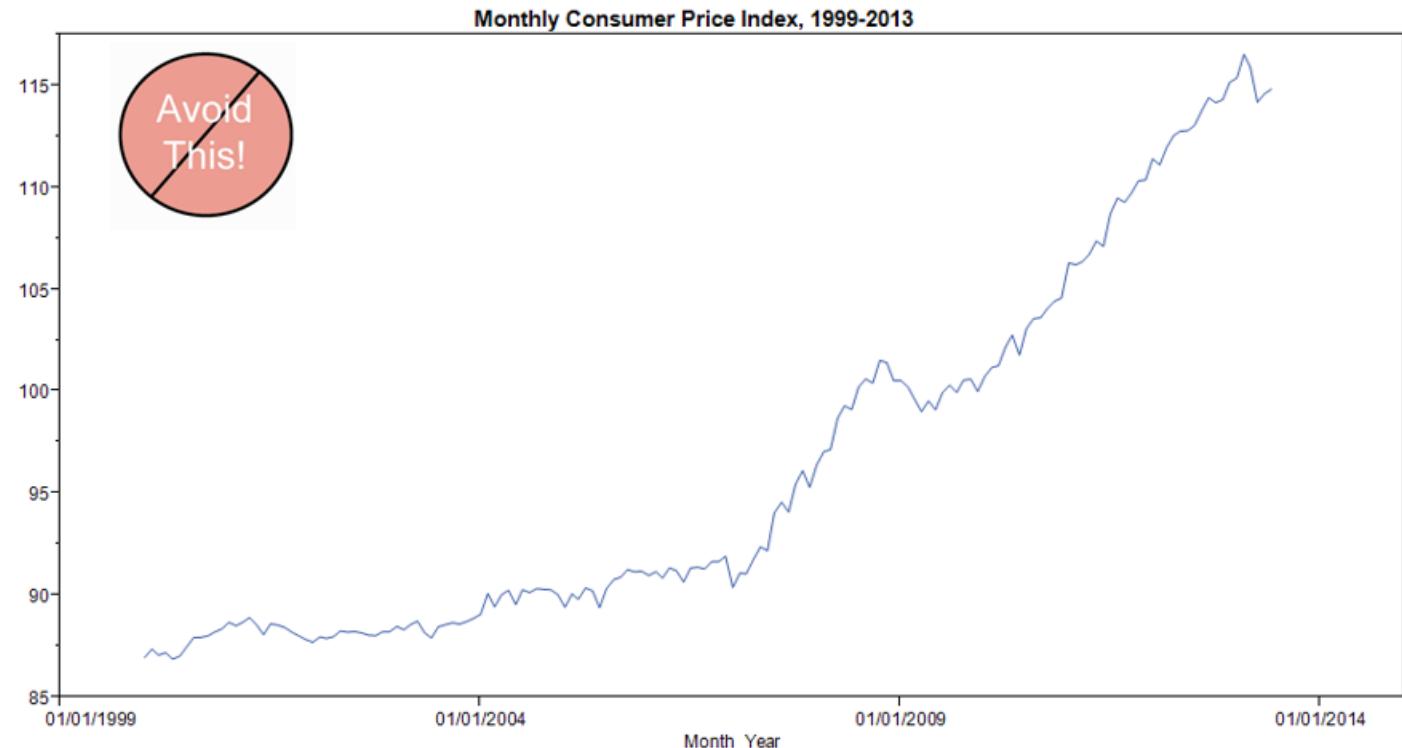
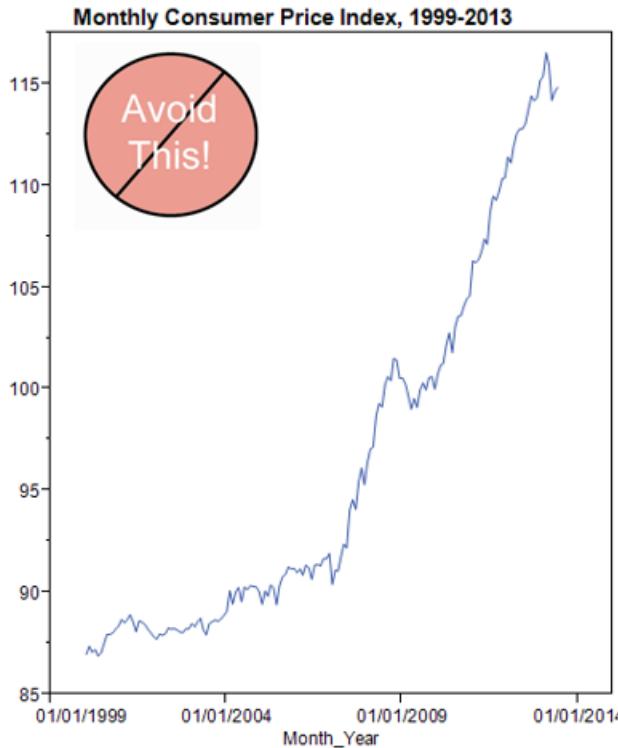
Practical used of data-ink

Shouting to emphasize what's interesting



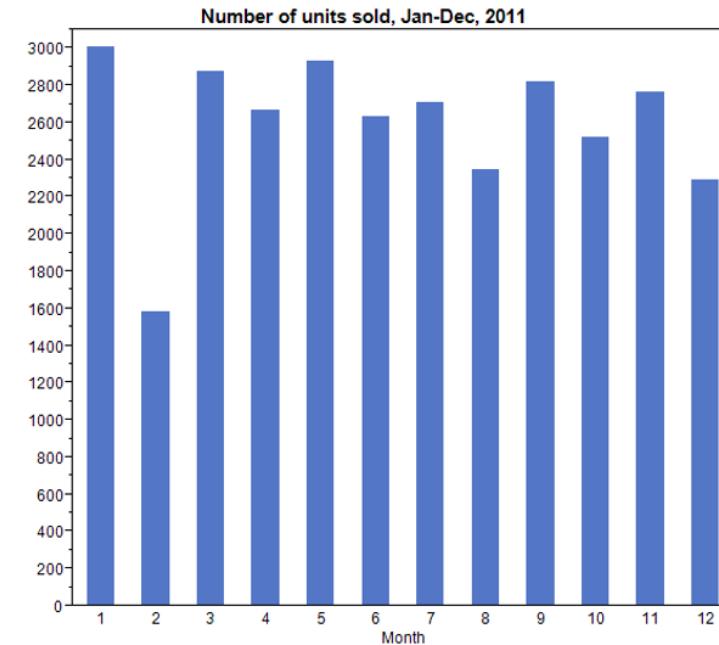
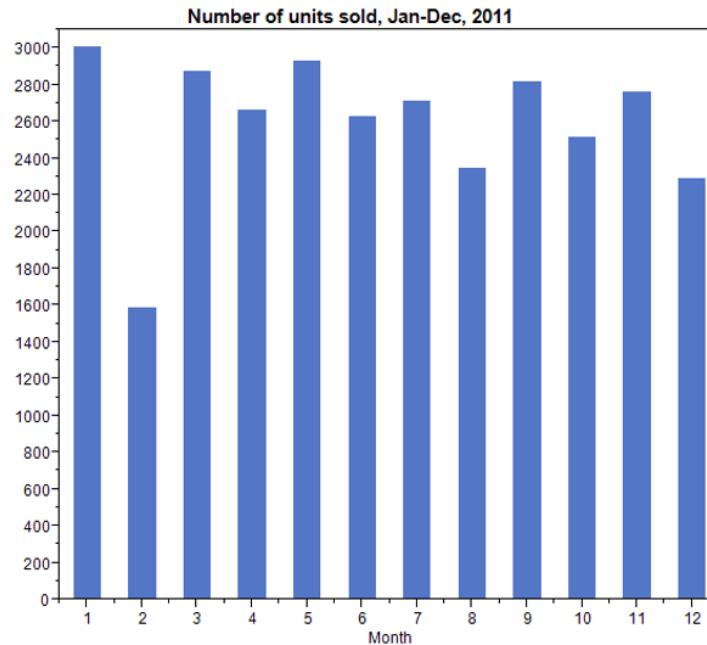
What should the relative lengths of the axis be?

- Should not manipulate the aspect ratio to intentionally exaggerate or downplay the rate of change.
- Stick to the convention of making your graphs wider than being tall.



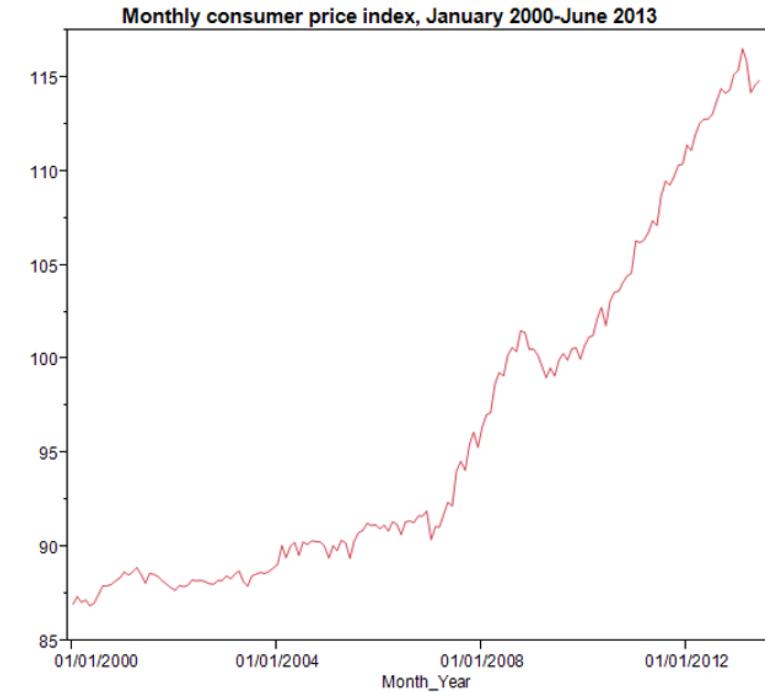
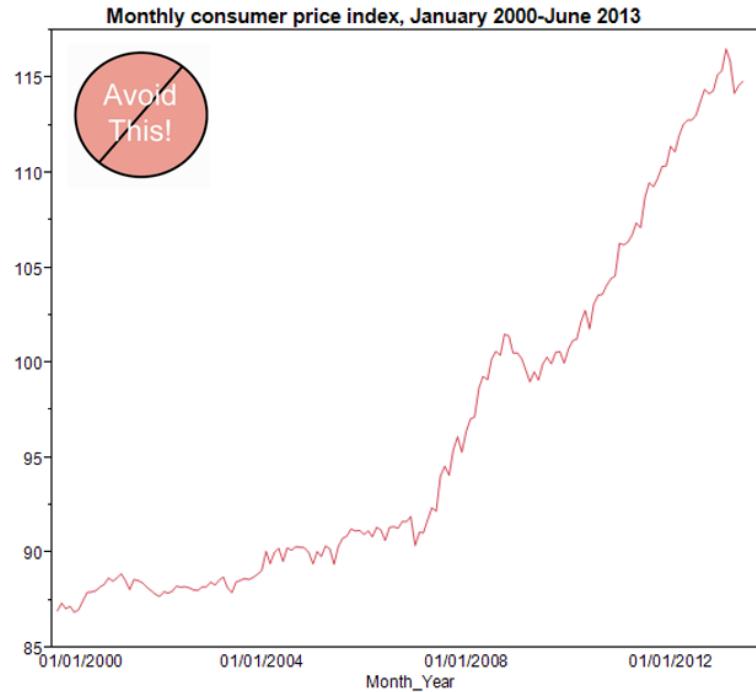
When can you eliminate tick mark?

Tick marks are superfluous on categorical scale.



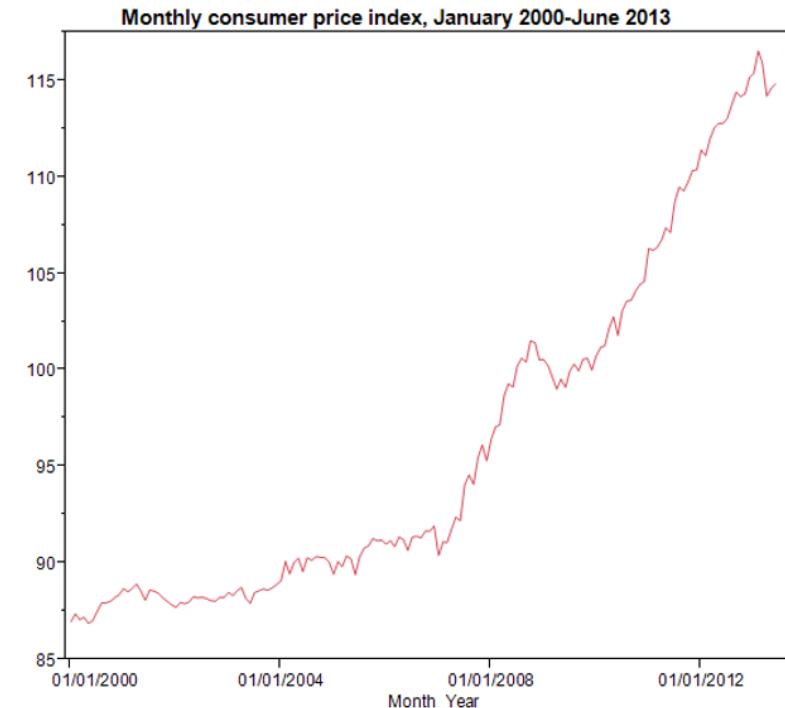
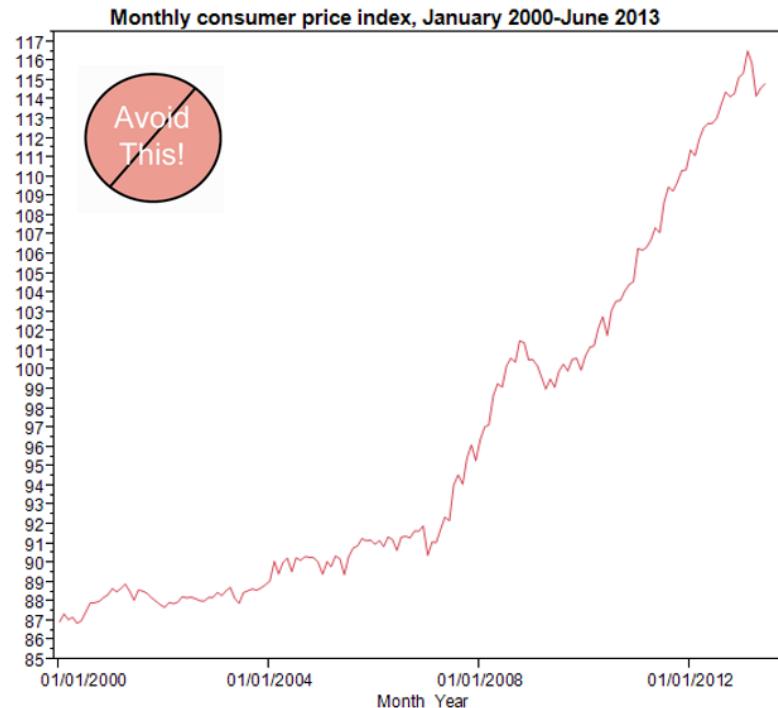
When you shouldn't eliminate tick mark?

Tick marks are necessary on continuous scale.



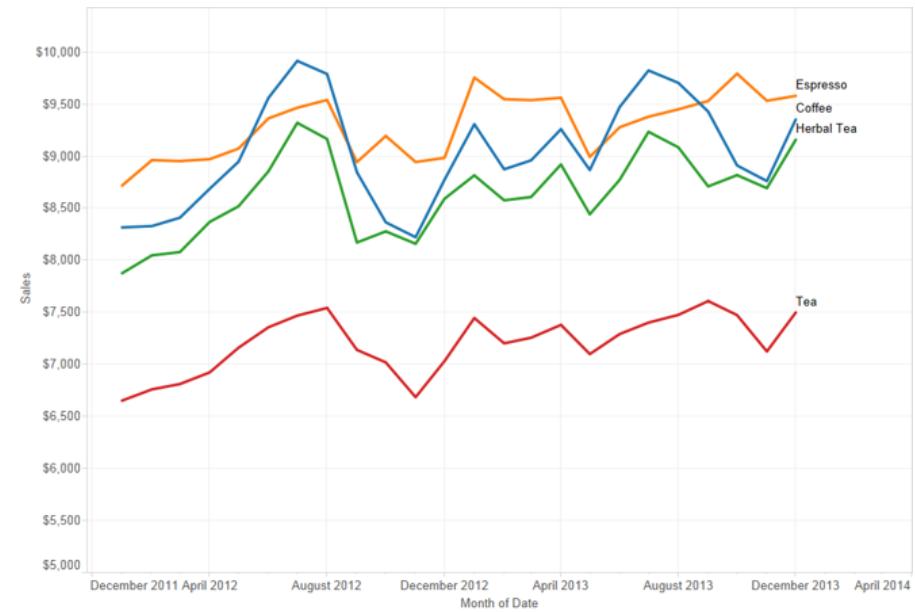
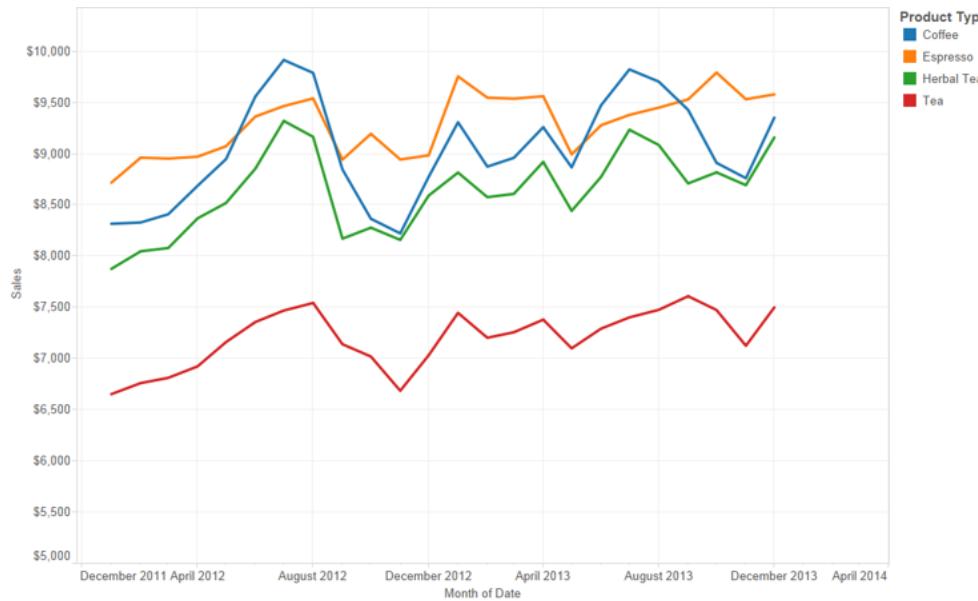
How many tick marks should you use?

- There is no exact number that works best in all circumstances, and the size of the graph is a factor that must be considered: the longer the scale line, the more tick marks it should contain.

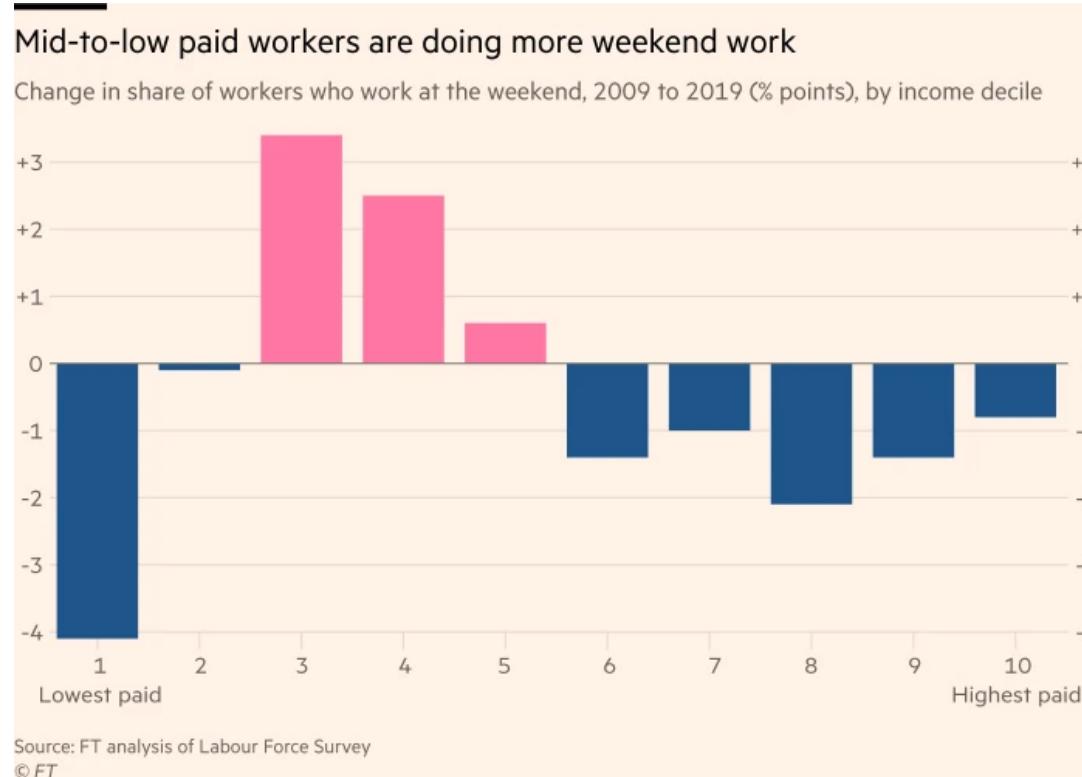


When can you eliminate legends?

- In this graph, a legend is used to indicate product types.
- In this graph, product types are labeled directly.



An enlightening data visualisation will be incomplete without a well worded title



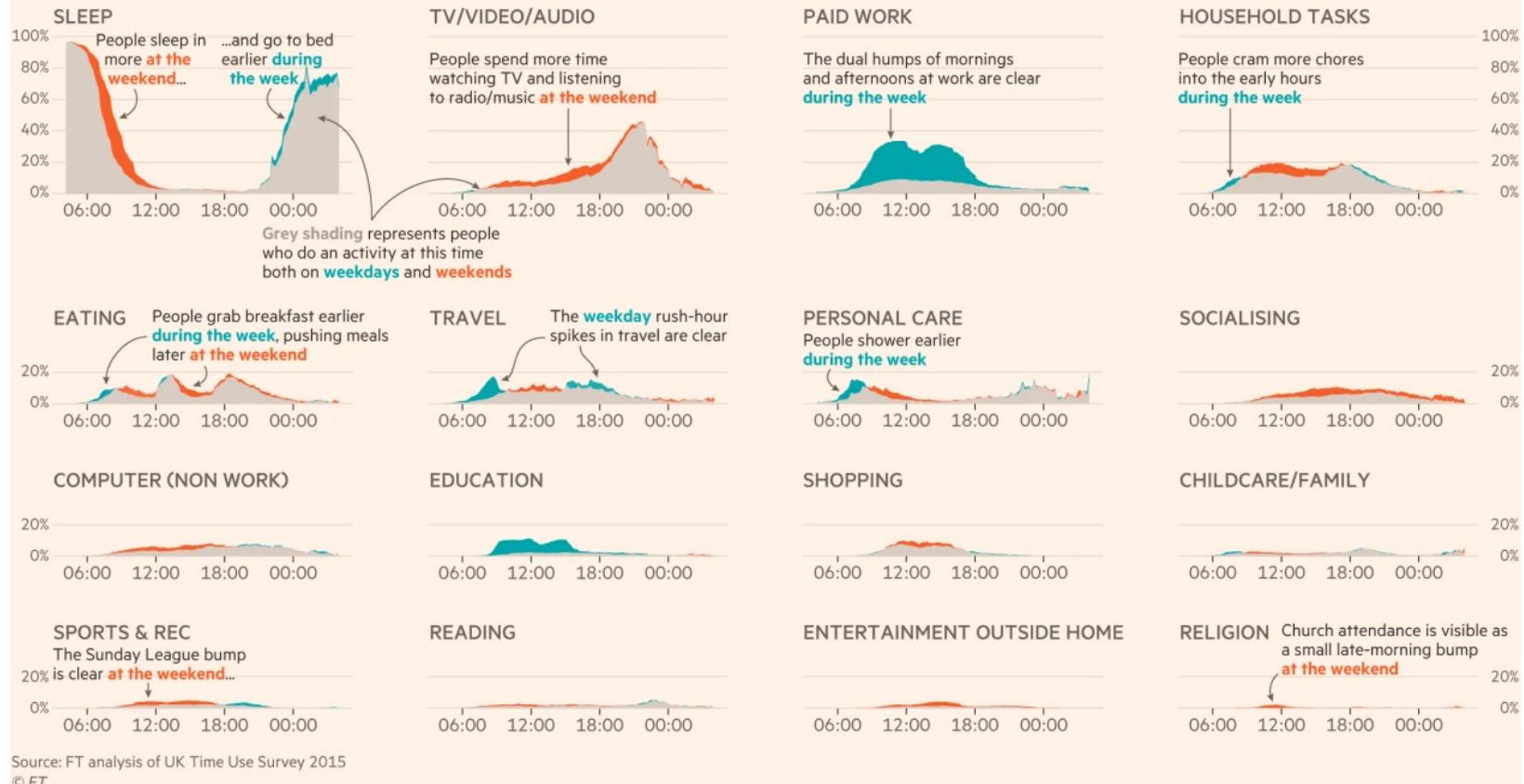
Source: [The truth about weekend working](#), Financial Times, January 23 2020.

- More example can be found [here](#)

Using Annotation to tell data story

How Britons spend their time at weekends vs weekdays

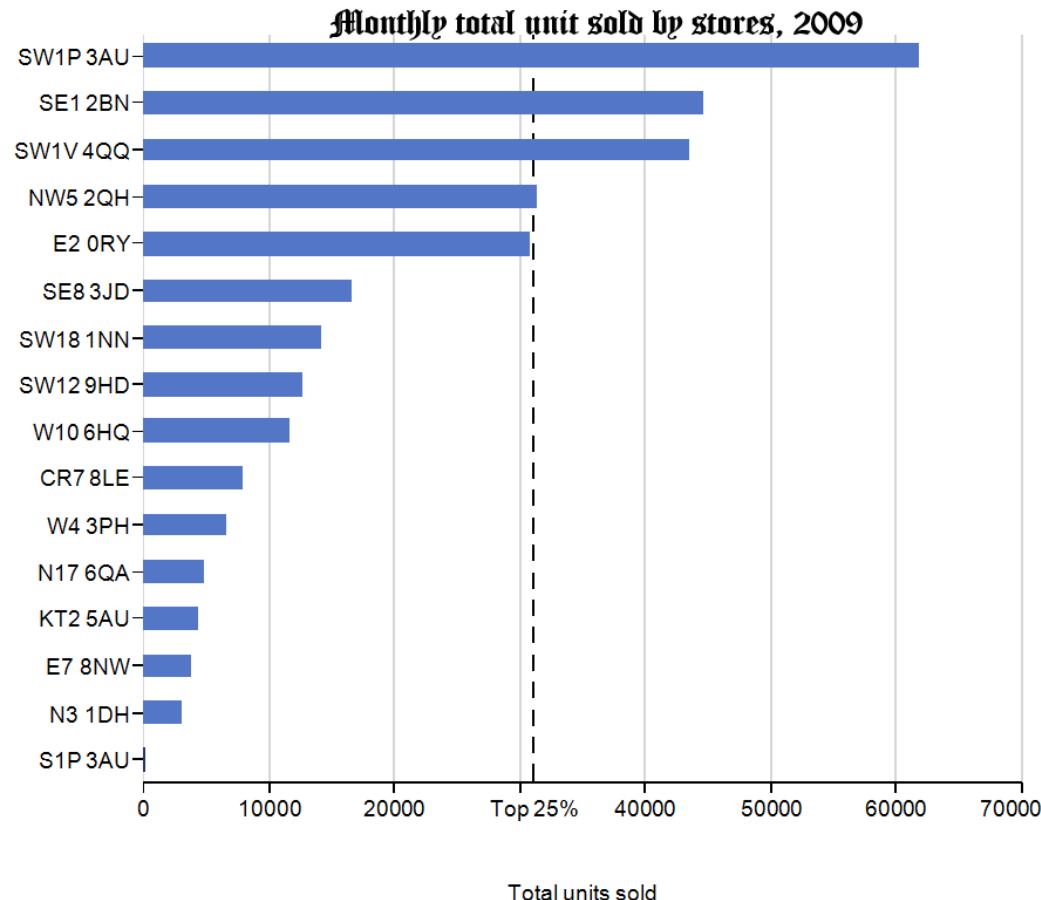
Share of people doing specific activities during **weekends** vs **weekdays**, by time of day (%)



Source: [The truth about weekend working](#), Financial Times, January 23 2020.

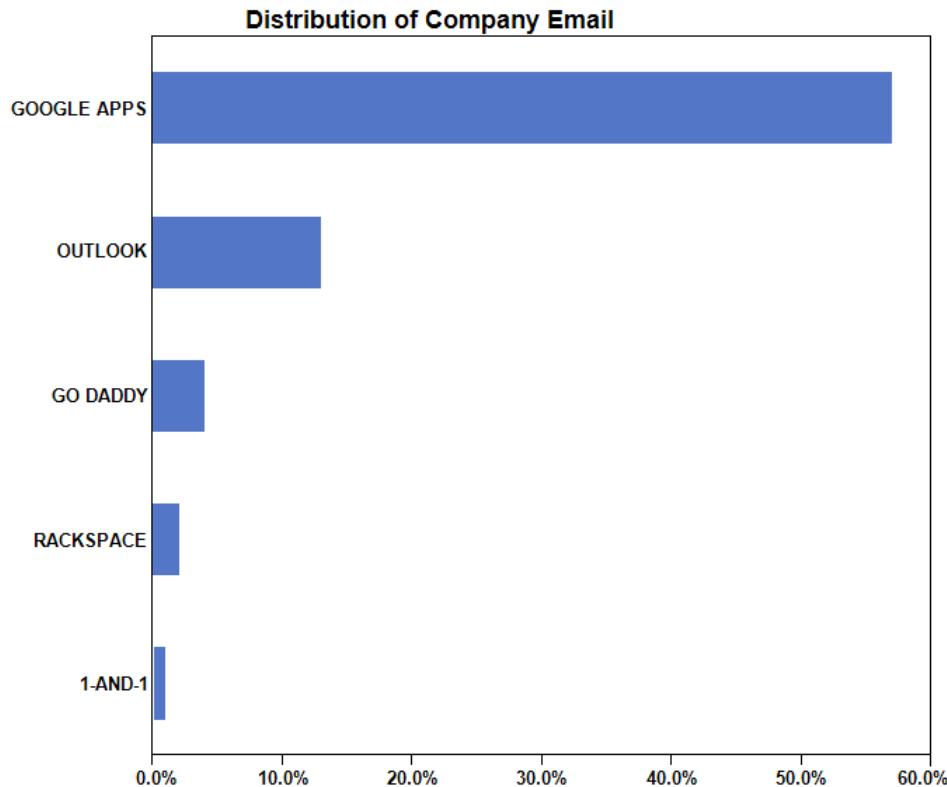
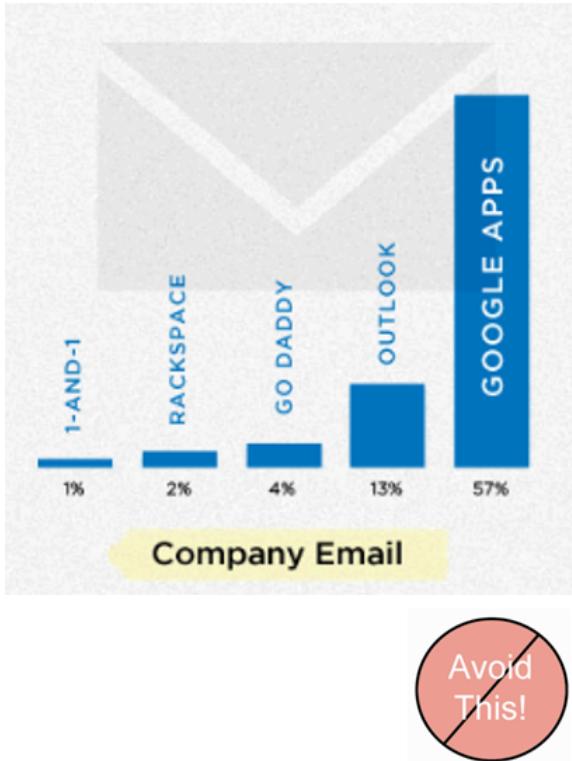
Graph typography

Avoid using artistic fonts



Graph Labeling

Orientation of label should be reader friendly



When should you use other text?

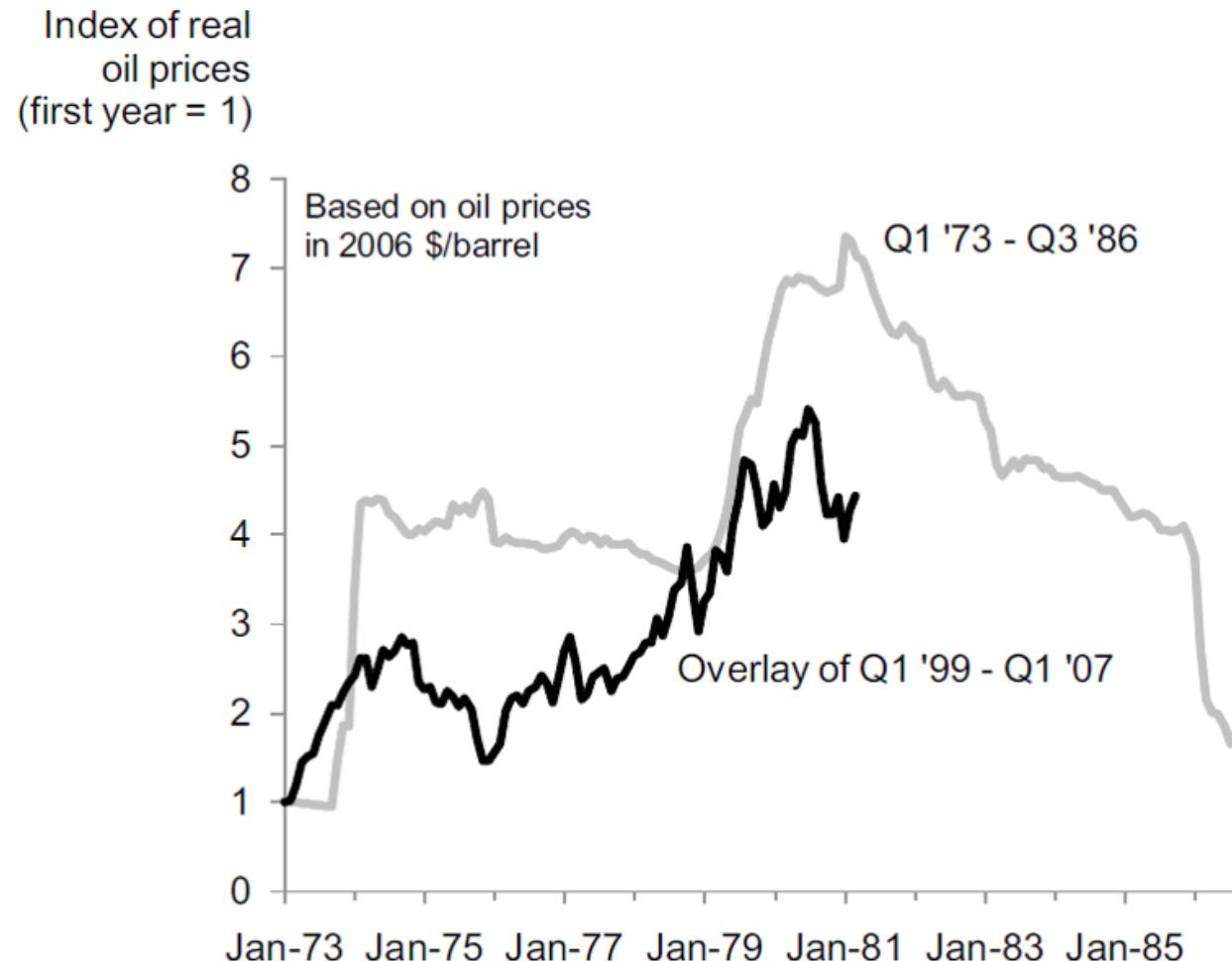
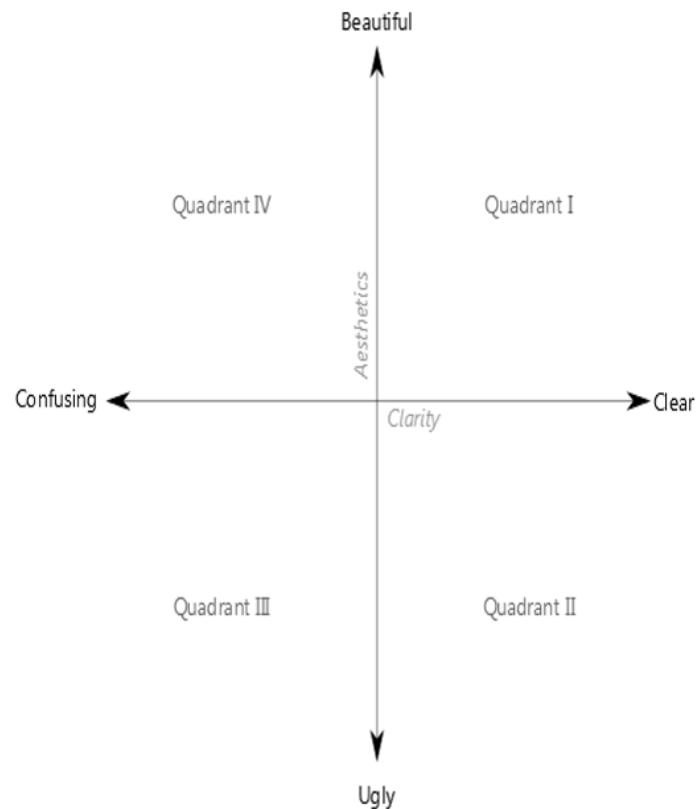


Figure 4: Real refinery acquisition cost for imported crude oil to the U.S.
(First year of time series = 1.0)

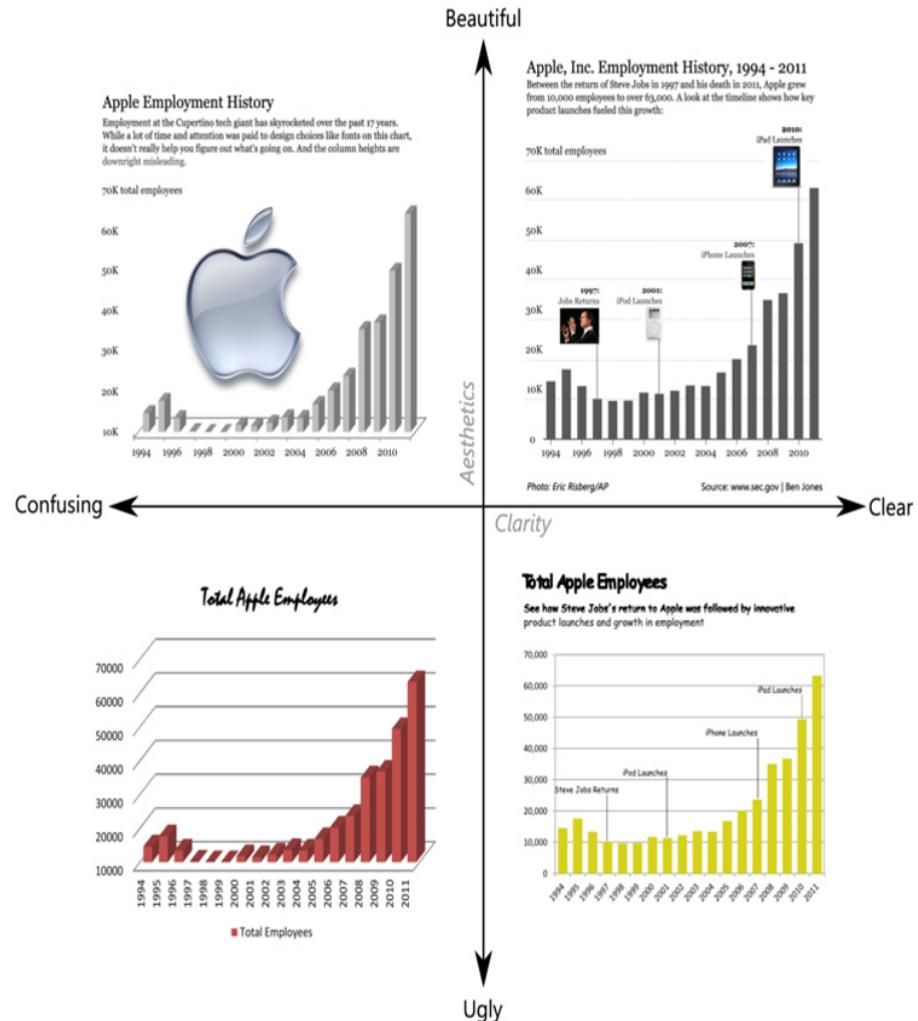
Data Visualization: Clarity or Aesthetics?

Mapping data visualizations on a Cartesian coordinate system where "clarity" is placed along the horizontal (x) axis and "aesthetics" is placed along the vertical (y) axis provides a framework to gage the objective and subjective merits of a graphic:



Source: <http://dataremixed.com/2012/05/data-visualization-clarity-or-aesthetics/>

A Tale of Four Quadrants



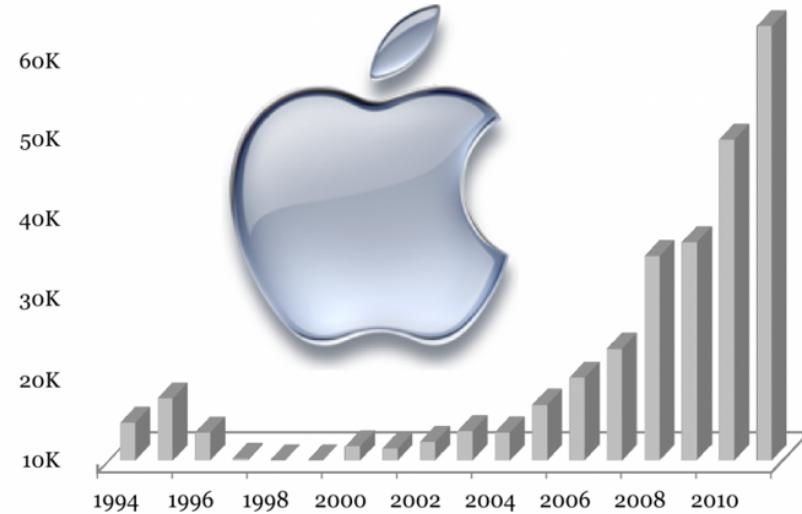
Quadrant IV – Confusing yet Beautiful

- Why is it “beautiful”?
 - Well placed & aligned title & lead-in
 - Attention to detail with font selection
 - Inclusion of image
- Why is it “confusing”?
 - Y-axis starts at 10K (column height misleading)
 - 3D effect makes it difficult to gage heights
 - Title & lead-in aren’t helpful

Apple Employment History

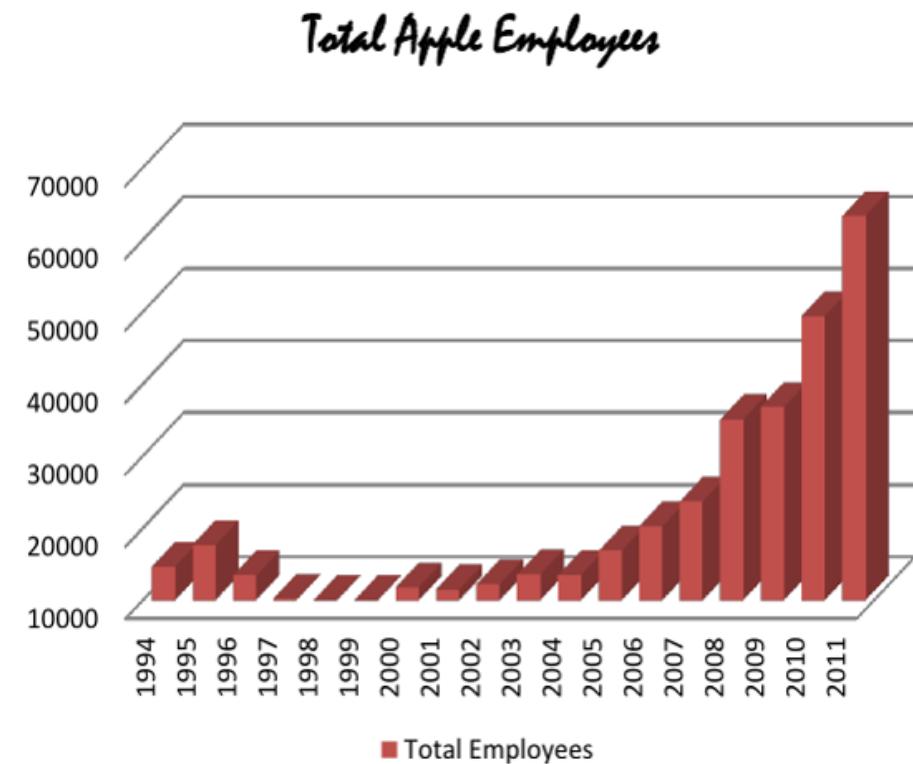
Employment at the Cupertino tech giant has skyrocketed over the past 17 years. While a lot of time and attention was paid to design choices like fonts on this chart, it doesn’t really help you figure out what’s going on. And the column heights are downright misleading

70K total employees



Quadrant III – Confusing and Ugly

- Why is it “ugly”?
 - Horrible font & color choice
 - Grid lines are too dark & distracting
 - Format of axes (vertical x-axis labels, number format of y-axis)
- Why is it “confusing”?
 - Y-axis starts at 10K (column height misleading)
 - 3D effect makes it difficult to gage heights
 - No lead-in or call-outs to provide context



Quadrant II – Clear but Ugly

- Why is it “ugly”?

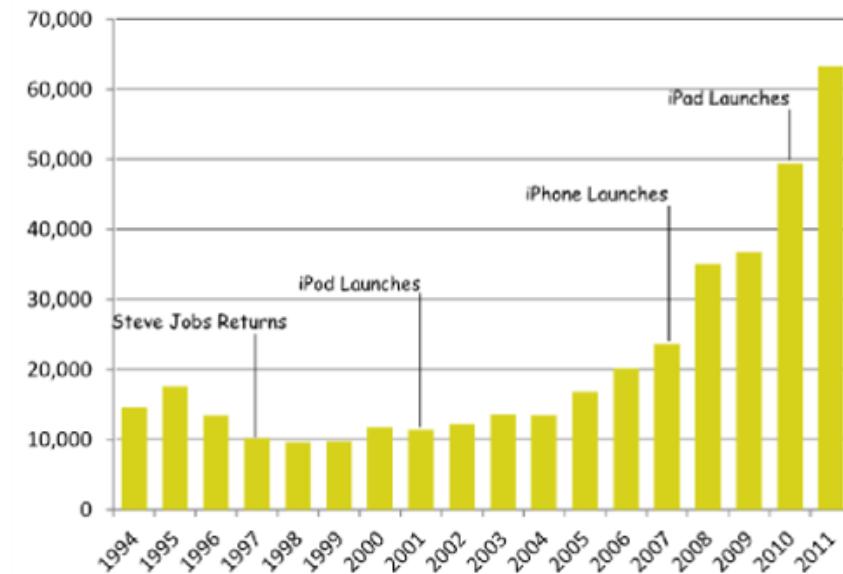
- Poor color (puke yellow?) and font (Comic Sans?) choices
- Slightly pixelated – poor attention to image quality detail
- Chart details – axis orientation, grid lines, outline

- Why is it “clear”?

- The y-axis starts at 0 and the 2D columns are easy to gage
- For the first time, we see call-outs of relevant events on the timeline
- This time the lead-in paragraph is actually informative

Total Apple Employees

See how Steve Jobs's return to Apple was followed by innovative product launches and growth in employment



Quadrant I – Clear and Beautiful

- Why is it “beautiful”?

- Good font & color choices throughout
- Soft gridlines don’t distract
- All elements well aligned and spaced
- High res images are “useful” chartjunk

- Why is it “clear”?

- The y-axis starts at 0 and the 2D columns are easy to gage
- Call-outs with images aid cognition
- Improved title & lead-in verbiage provide further elucidation
- For the first time, a photo credit and data source are included

Apple, Inc. Employment History, 1994 - 2011

Between the return of Steve Jobs in 1997 and his death in 2011, Apple grew from 10,000 employees to over 63,000. A look at the timeline shows how key product launches fueled this growth:

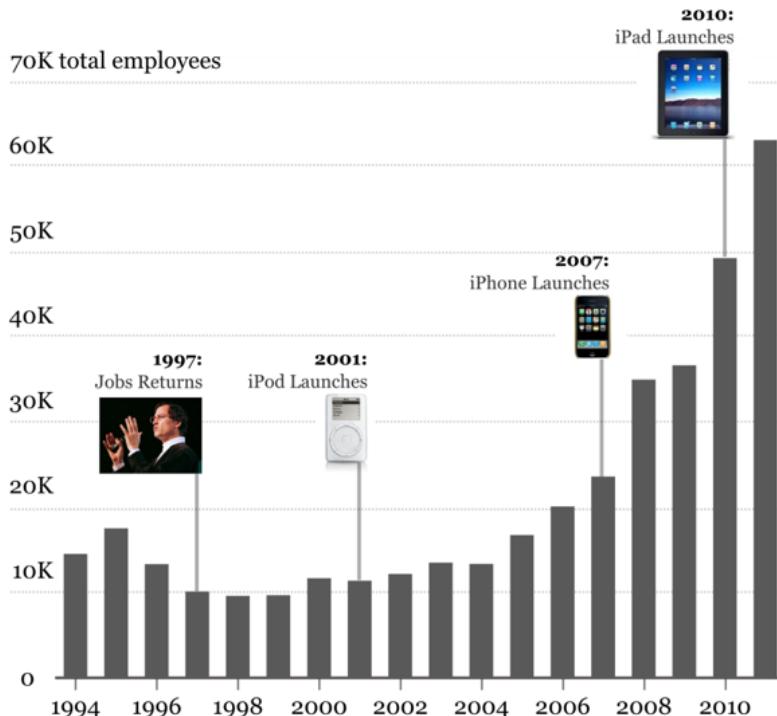


Photo: Eric Risberg/AP

Source: www.sec.gov | Ben Jones

References

- Claus O. Wilke (2019) [Fundamentals of Data Visualization](#). O'Reilly, USA.
- Few, Stephen (2012) (2nd edition) [Show Me the Numbers: Designing Tables and Graphs to Enlighten](#), Analytics Press, Oakland, USA
- Cairo, Alberto (2019) [How Charts Lie](#), W.W. Norton & Company, USA.
- Robbins, Naomi B. (2005) [Creating More Effective Graphs](#), John Wiley & Sons, New Jersey, USA
- Wong, Dona M. (2010) [The Wall Street Journal Guide to Information Graphics](#), W. W. Norton & Company, Inc. New York.
- Tufte, Edward (2nd Edition) [The Visual Display of Quantitative Information](#), Graphics Press LLC, Connecticut, USA.

Highly recommended blog

Junk Charts (http://junkcharts.typepad.com/junk_charts/)

Perceptual Edge (<http://www.perceptualedge.com/blog/>)

Statistical Graphics and more (<http://www.theusrus.de/blog/>)

EagerEyes (<http://eagereyes.org/>)

The Functional Art (<http://www.thefunctionalart.com/>)

Visualizing data (<http://www.visualisingdata.com/>) DataViz (<http://www.improving-visualisation.org/>)

Visualizing Economics (<http://visualizingeconomics.com/>)