Graph Construction

Data Management and Visualization

Grammar of Graphics

- Theory behind graphics construction
  - Separation of data from aesthetic
  - Definition of common plot/chart elements
  - Composition of such common elements
- Building a graphic involves
  1. Specification
  2. Assembly
  3. Display

Leland Wilkinson, *The grammar of graphics*

Specification

- DATA: a set of data operations that create variables from datasets
  - Link variables (e.g., *by index* or *id*)
- TRANS: variable transformations (*e.g., rank*)
- SCALE: scale transformations (*e.g., log*)
- COORD: a coordinate system (*e.g., polar*)
- ELEMENT: visual objects (*e.g., points*) and their aesthetic attributes (*e.g., color, position*)
- GUIDE: guides (e.g., *axes*, *legends*)

Specification for a scatter plot

- DATA: x =x
- DATA: y =y
- TRANS: x = x
- TRANS: y = y
- SCALE: *linear*(*dim*(1))
- SCALE: *linear*(*dim*(2))
- COORD: *rect*(*dim*(1, 2))
- GUIDE: *axis*(*dim*(1))
- GUIDE: *axis*(*dim*(2))
- ELEMENT: *point*(*position*(x*y))

Graph visual components

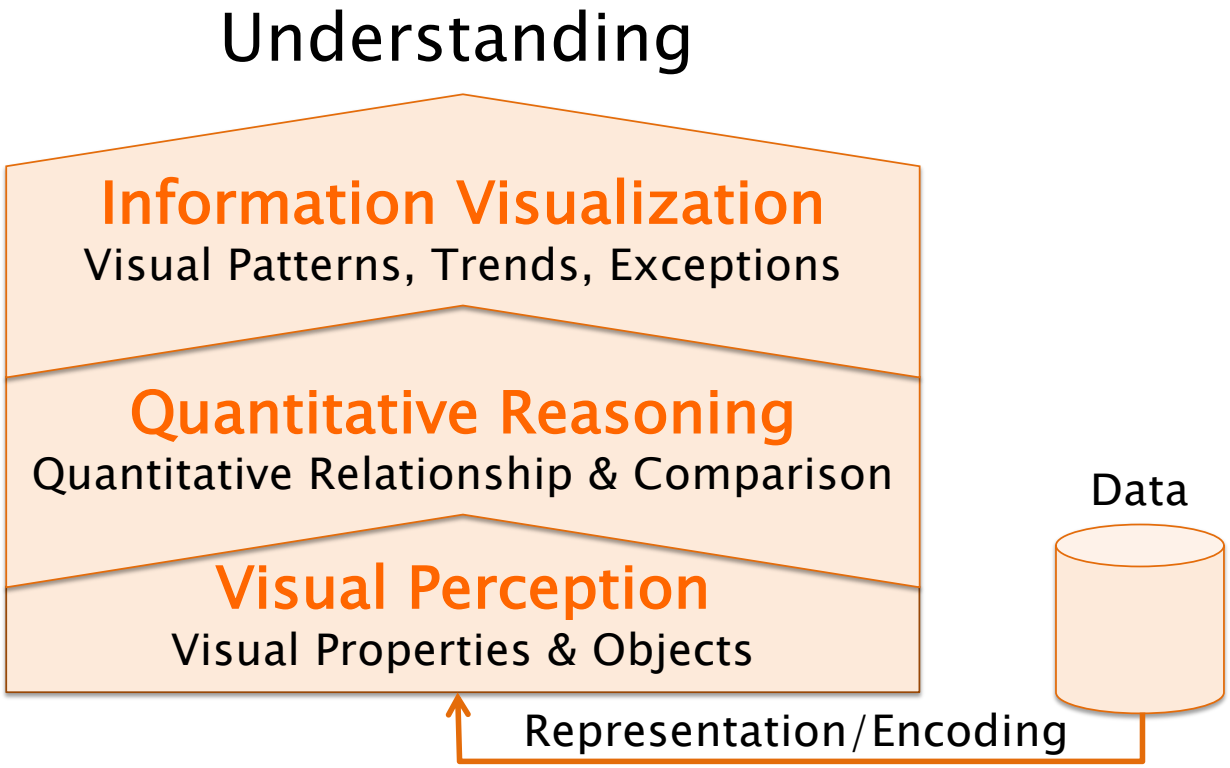
- Data components
  - Visual objects associated to measures
  - Visual attributes
- Layout
  - Positioning rules (e.g. cartesian coord)
- Support components
  - Axes
  - Labels
  - Legends

Visual Encoding

- Given a variable (measure), identify:
  - Visual object
  - Visual attribute
- Main distinction
  - Quantitative (interval, ratio, absolute)
  - Categorical (nominal, ordinal)

VISUAL RELATIONSHIPS

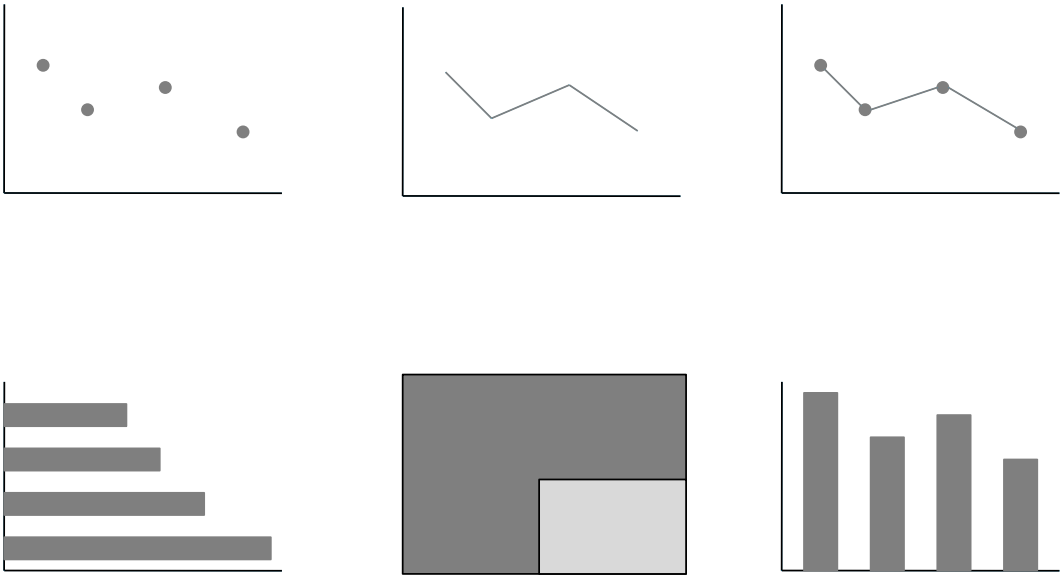
Data Visualization



Relationships

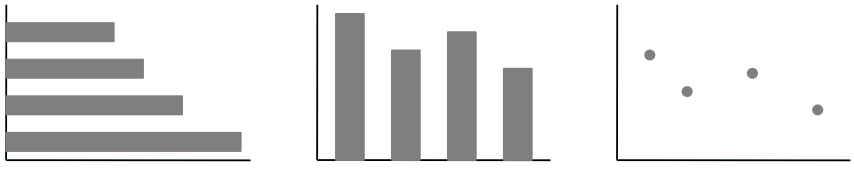
- Within a category
  - Nominal comparison
  - Ranking
  - Part-to-whole
  - Distribution
- Between measures
  - Time series
  - Deviation
  - Correlation

Quantitative encoding

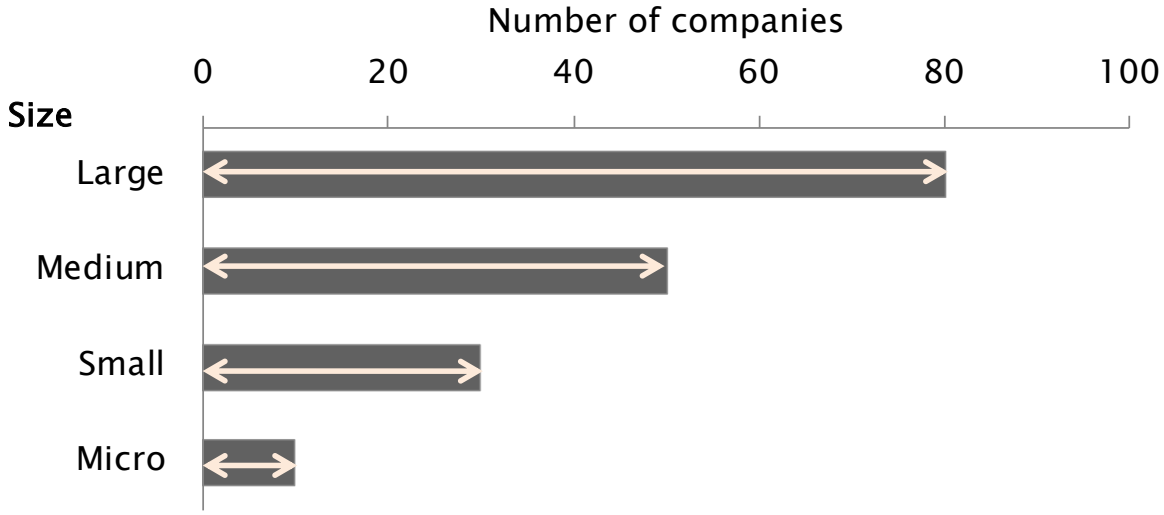


Nominal comparison

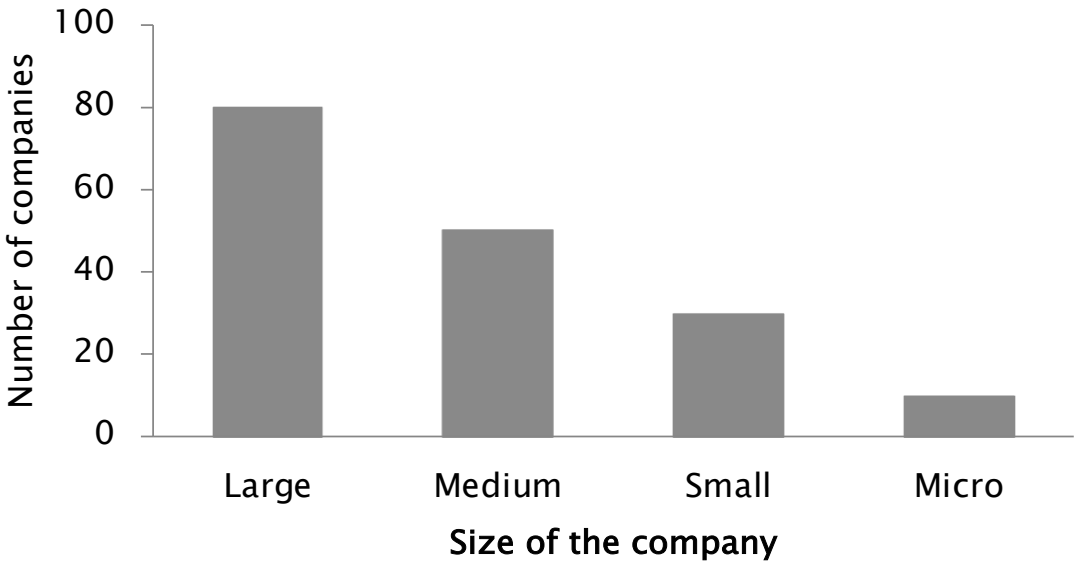
- Compare quantitative values corresponding to categorical levels
  - Small differences are difficult to see
    - Non zero-based scale can emphasize
  - Dot plots can be used for small differences
    - They do not require zero based scale



Line length – Bars chart



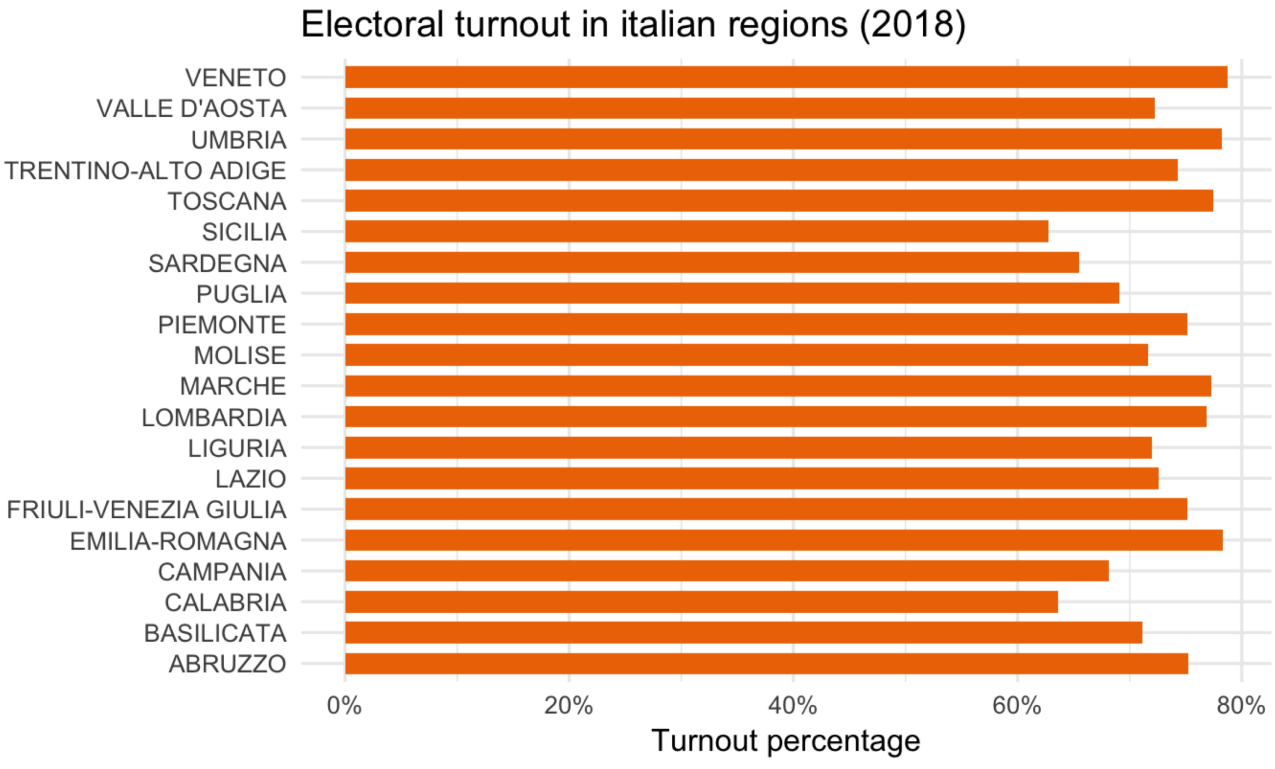
Vertical Bars (aka Columns)



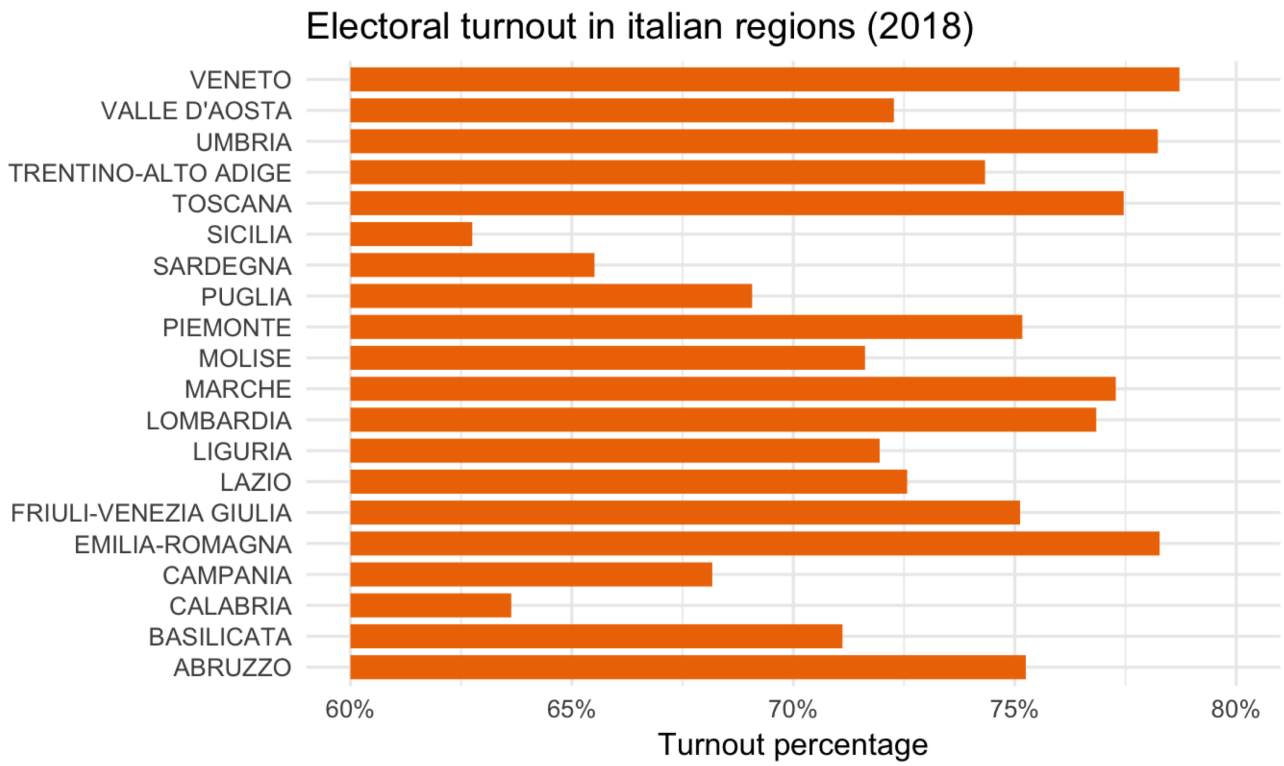
Bar charts

- Categorical values are encoded as position along an axis
- Quantitative values are encoded only as length of the bars
  - The axis is a supporting element
- Width of bars plays no role
  - Bars are just very thick lines
- Bars require a zero-based scale
  - See: Lie factor!

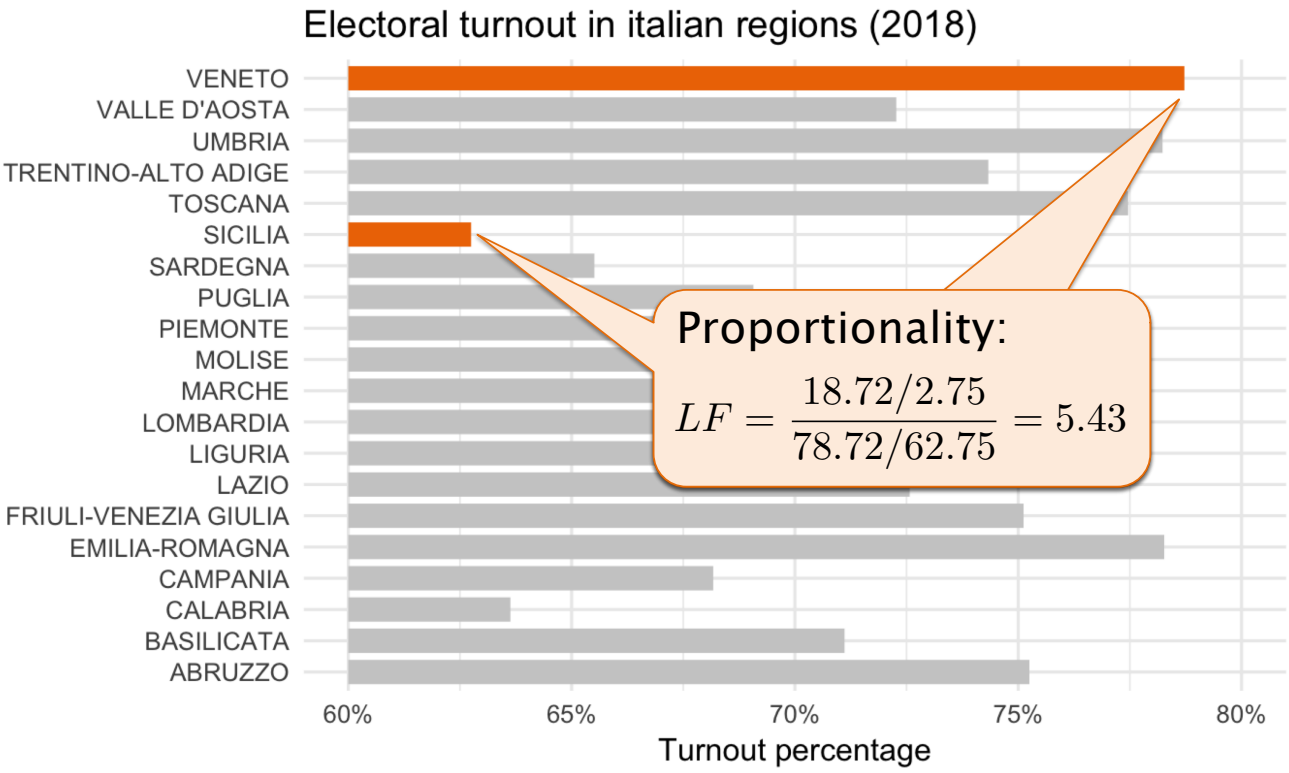
Comparison – Barplot



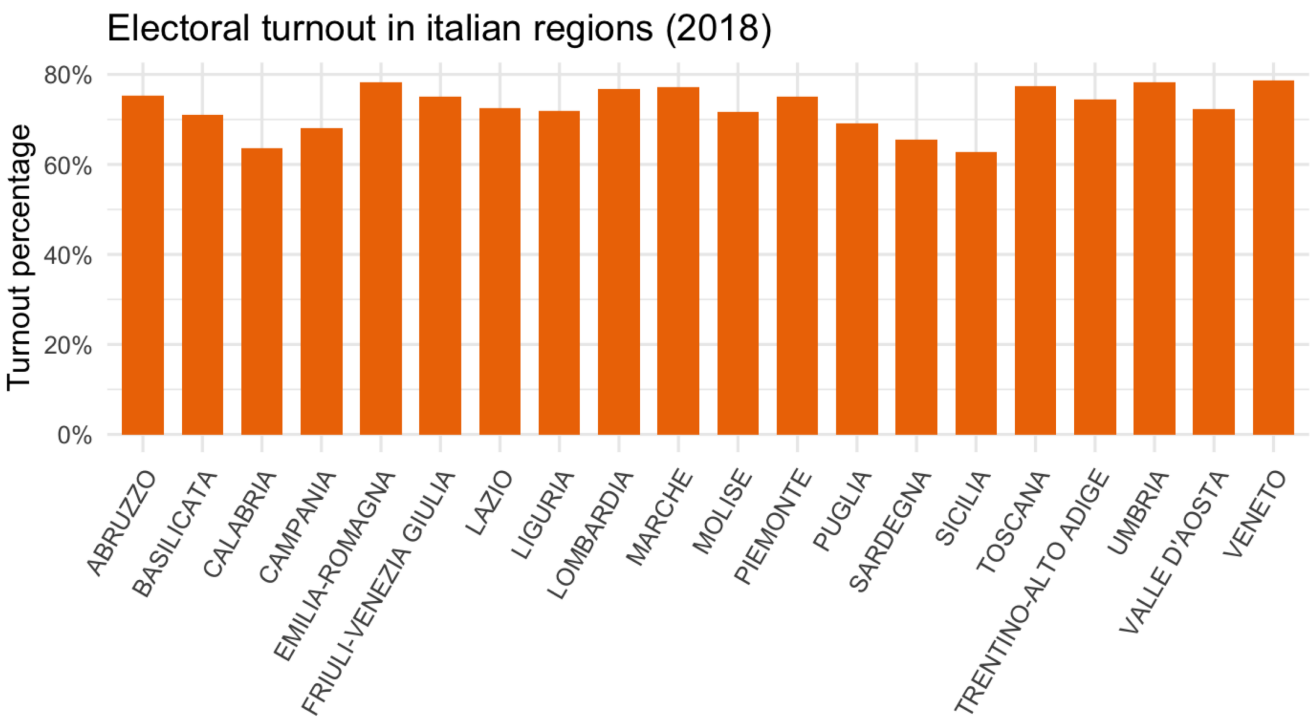
Barplot (non zero based scale)



Barplot (non zero based scale)



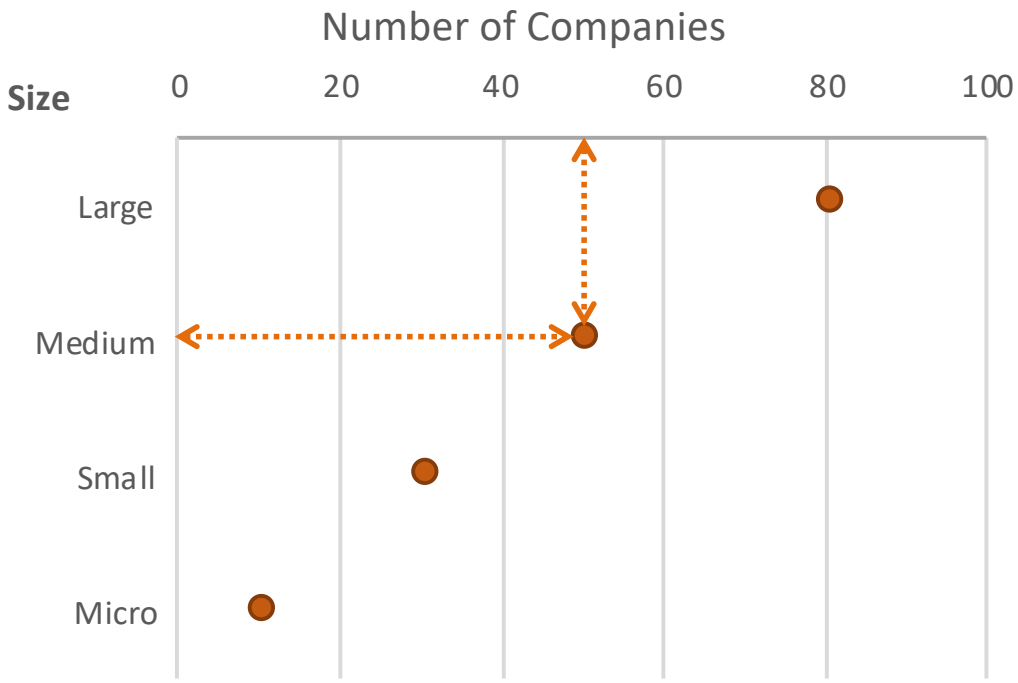
Barplot vertical labels



Bars Guidelines

- Use horizontal bars when
  - A descending order ranking
  - Categorical label don't fit
- Proximity
  - Use a 1:1 bar:spacing ratio ±50%
  - No spacing between bars that are not labeled on the axis (legend categories)
  - No overlapping bars

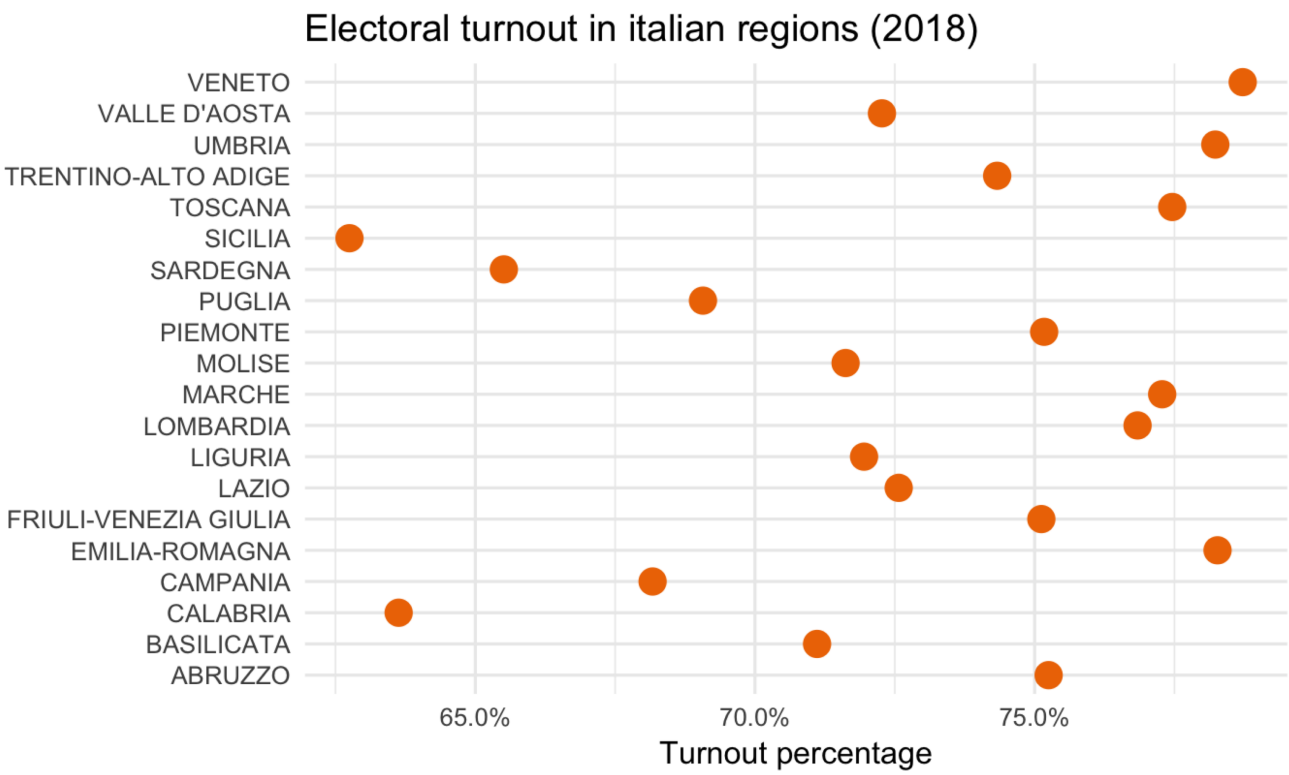
Position – Dots plot



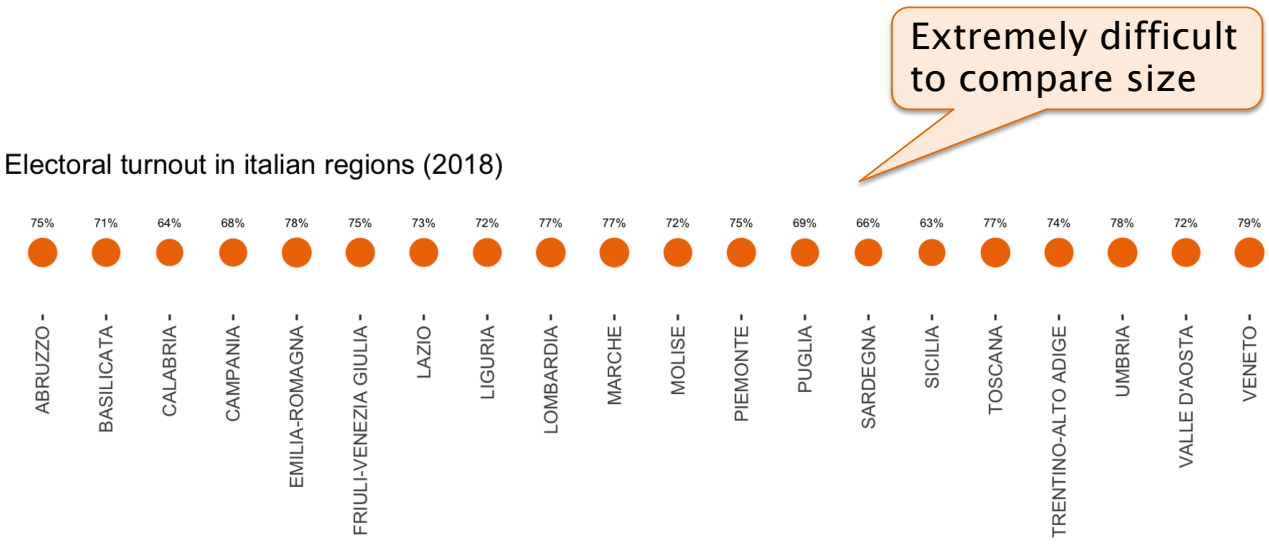
Dot plots

- Categorical values are encoded as position along an axis
- Quantitative values are encoded as position along an axis
  - There is no need to have a zero based axis range

Comparison – Dot plot

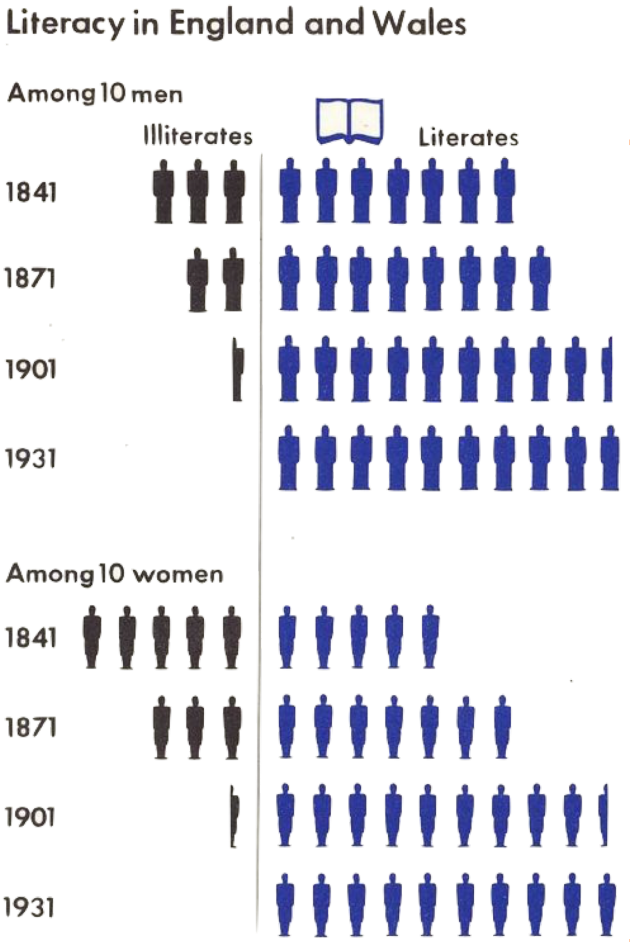


Area – Bubble plot



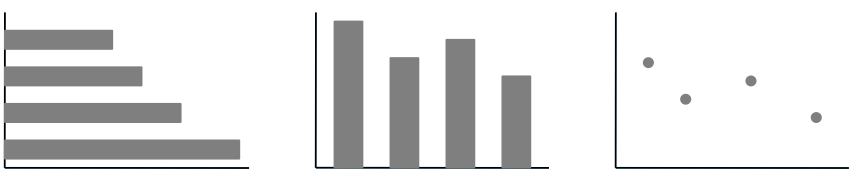
Count – Isotype

- Isotype
  - International System Of Typographic Picture Education
- Marie and Otto Neurath
  - Vienna, 1936



Ranking

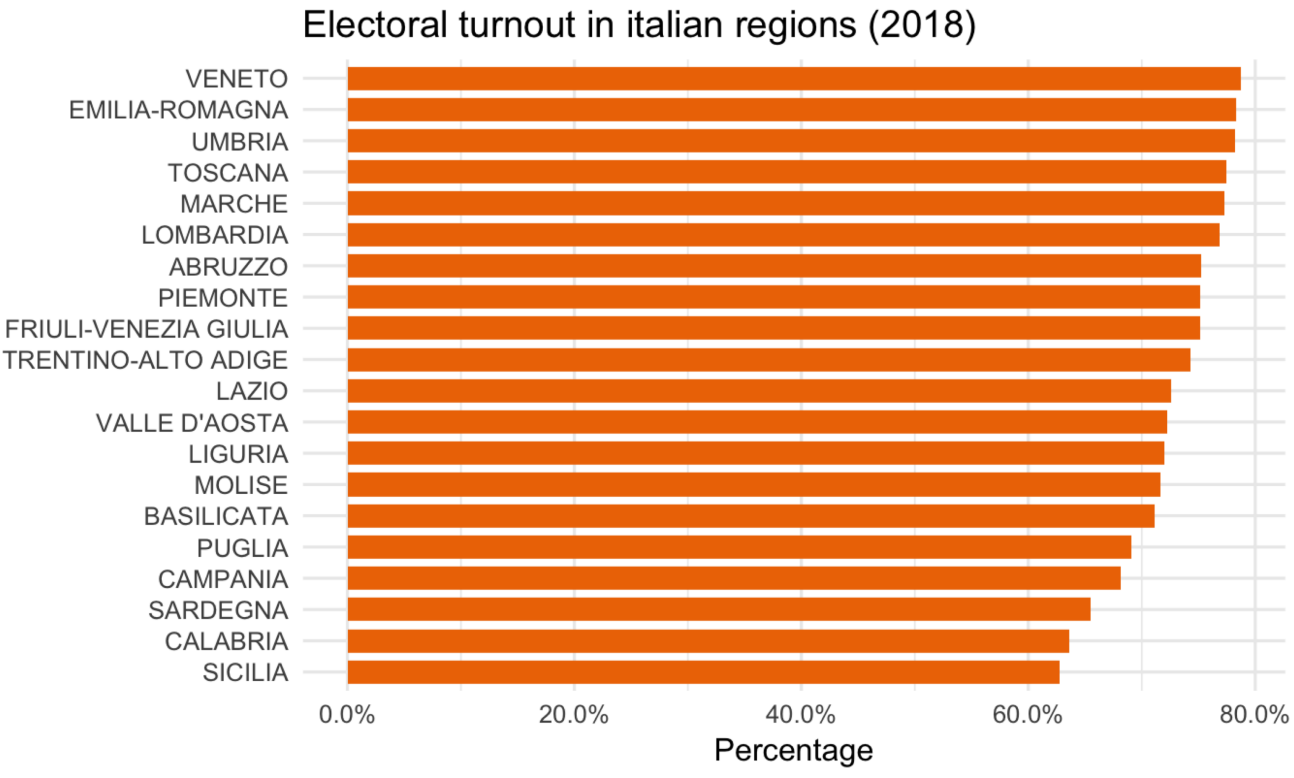
- Same type as nominal comparison
- Pay attention to order
  - Bar graphs
  - Dot plot
    - Allow non zero-based axes



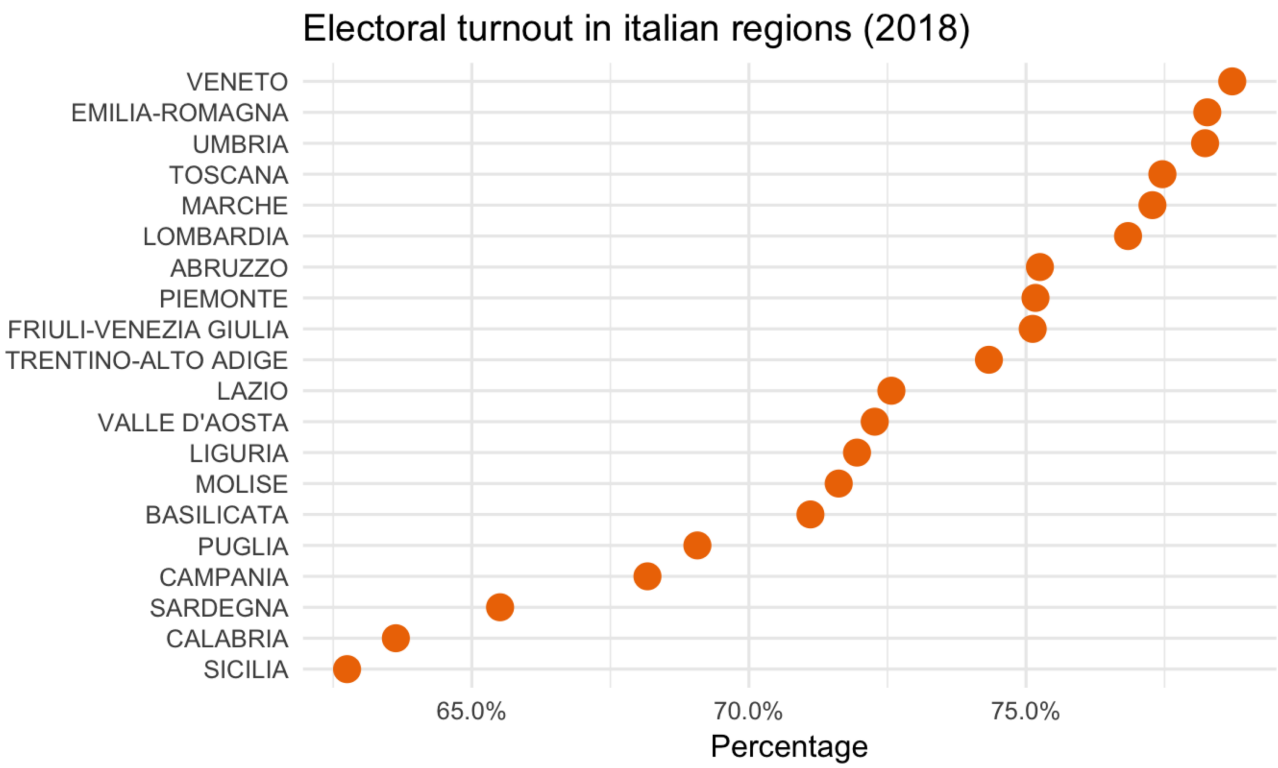
Ranking

Purpose	Sort order	Chart orientation
Highlight the highest value	Descending	H: highest on top V: highest on left
Highlight the lowest value	Ascending	H: lowest on top V: lowest on left

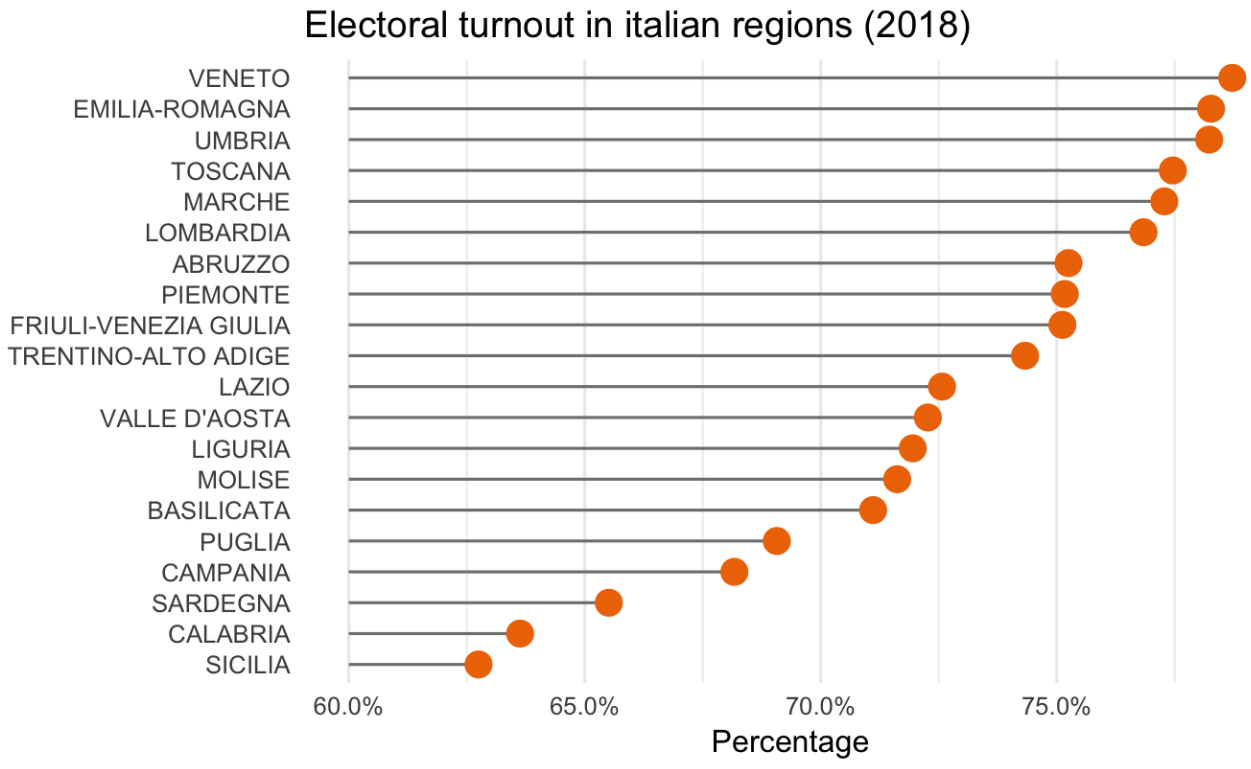
Ranking – Barplot



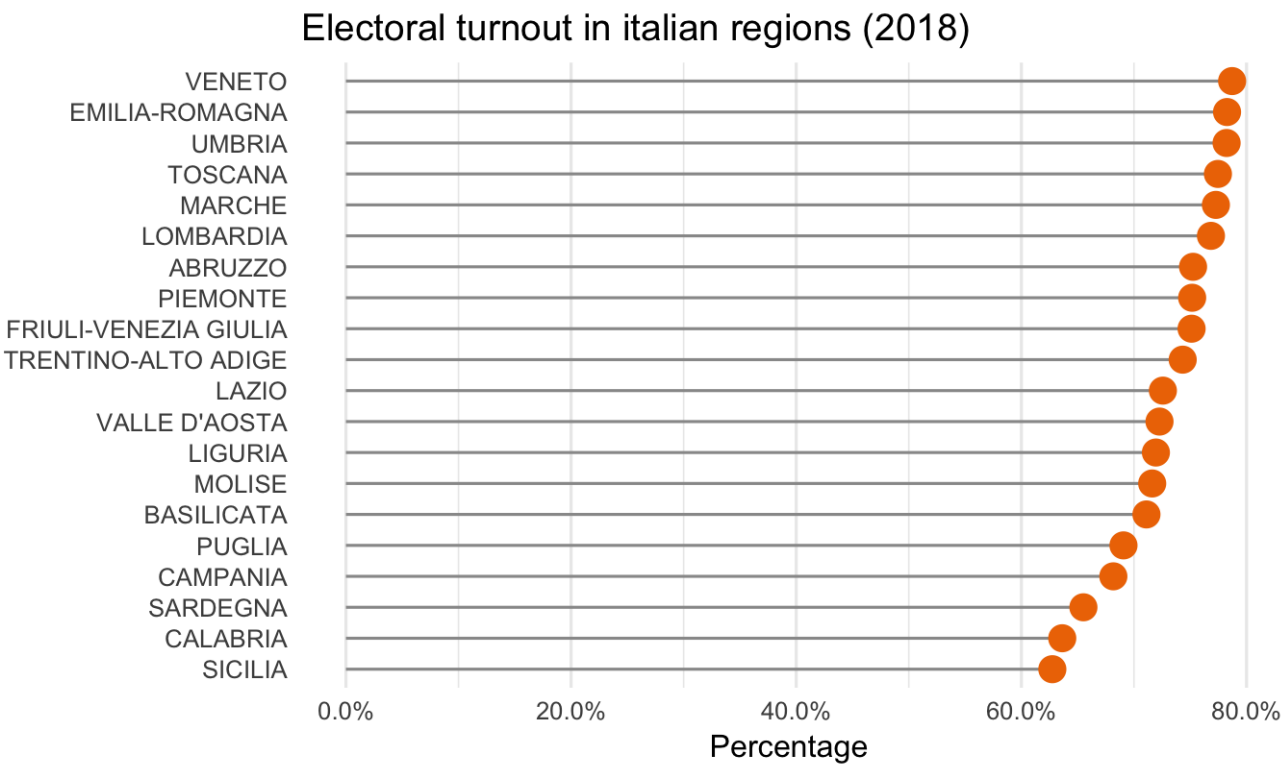
Ranking – Dot plot



Lollypop (non zero based scale)

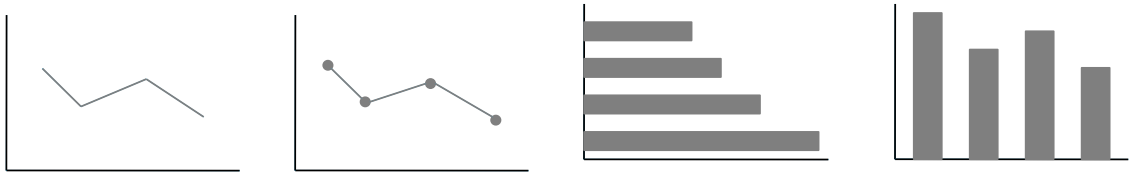


Lollypop (zero based scale)

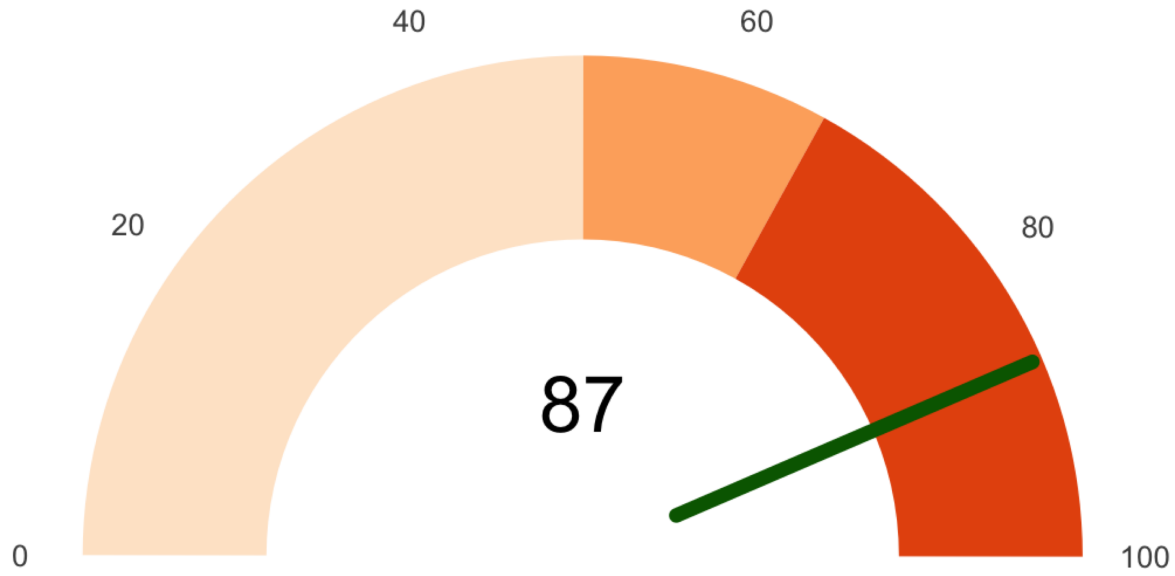


Deviation

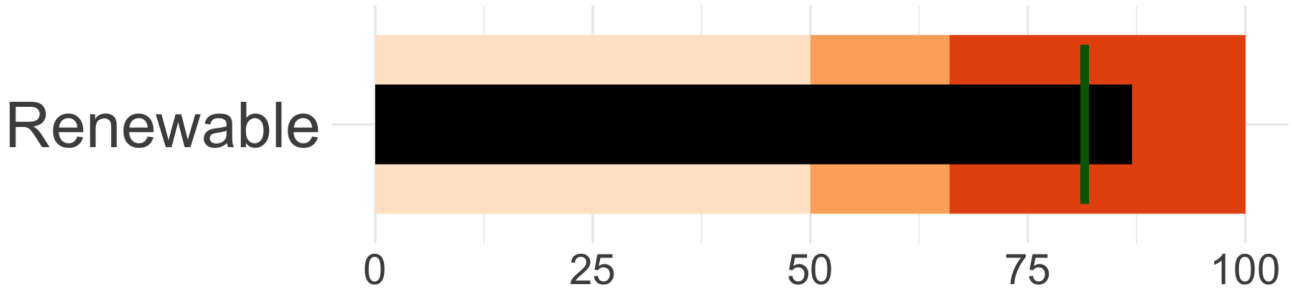
- To what degree one or more sets of values differ in relation to primary values.
  - Points (dots)
  - Gauge
  - Bars
  - Bullet



Angle + Position - Gauge



Length+Position- Bullet Graph

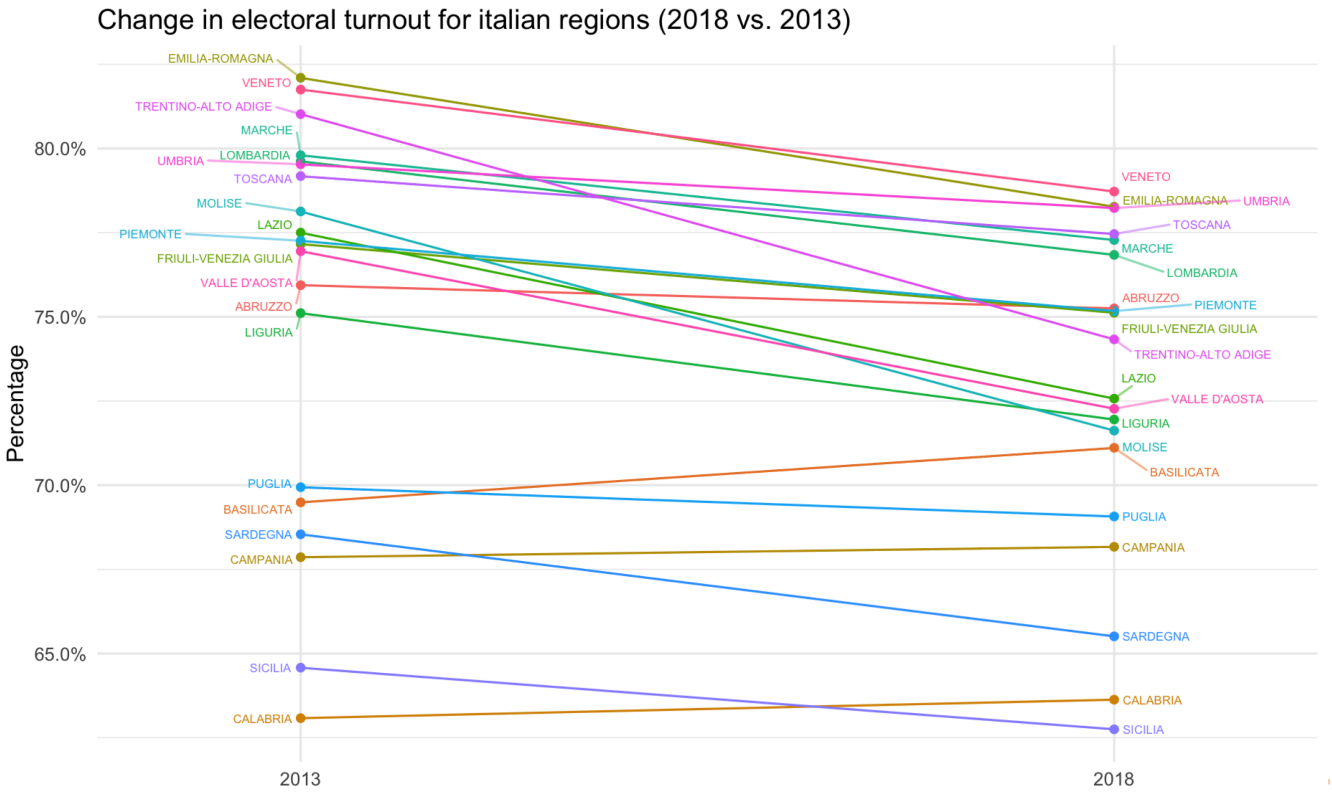


https://www.perceptualedge.com/articles/misc/Bullet_Graph_Design_Spec.pdf

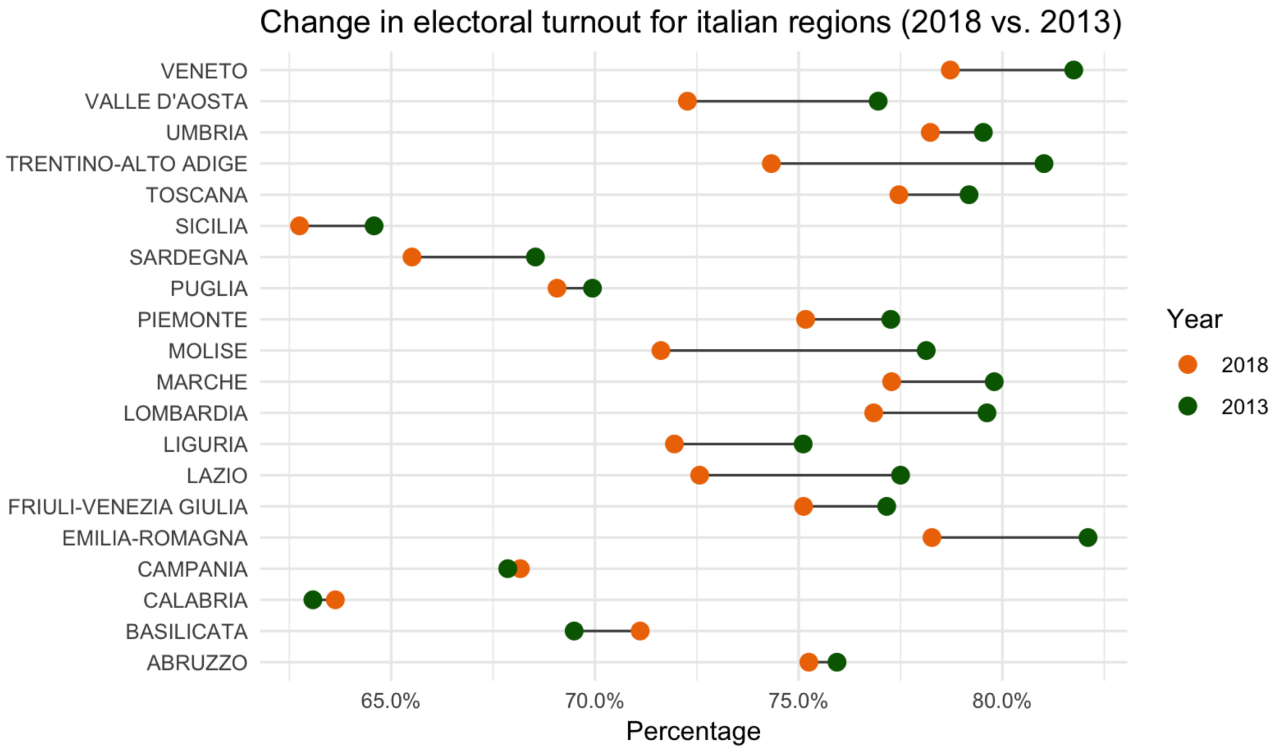
Pre-post variation

- Comparing several categorical values typically two conditions
  - Pre vs. post
  - With vs. without
  - …

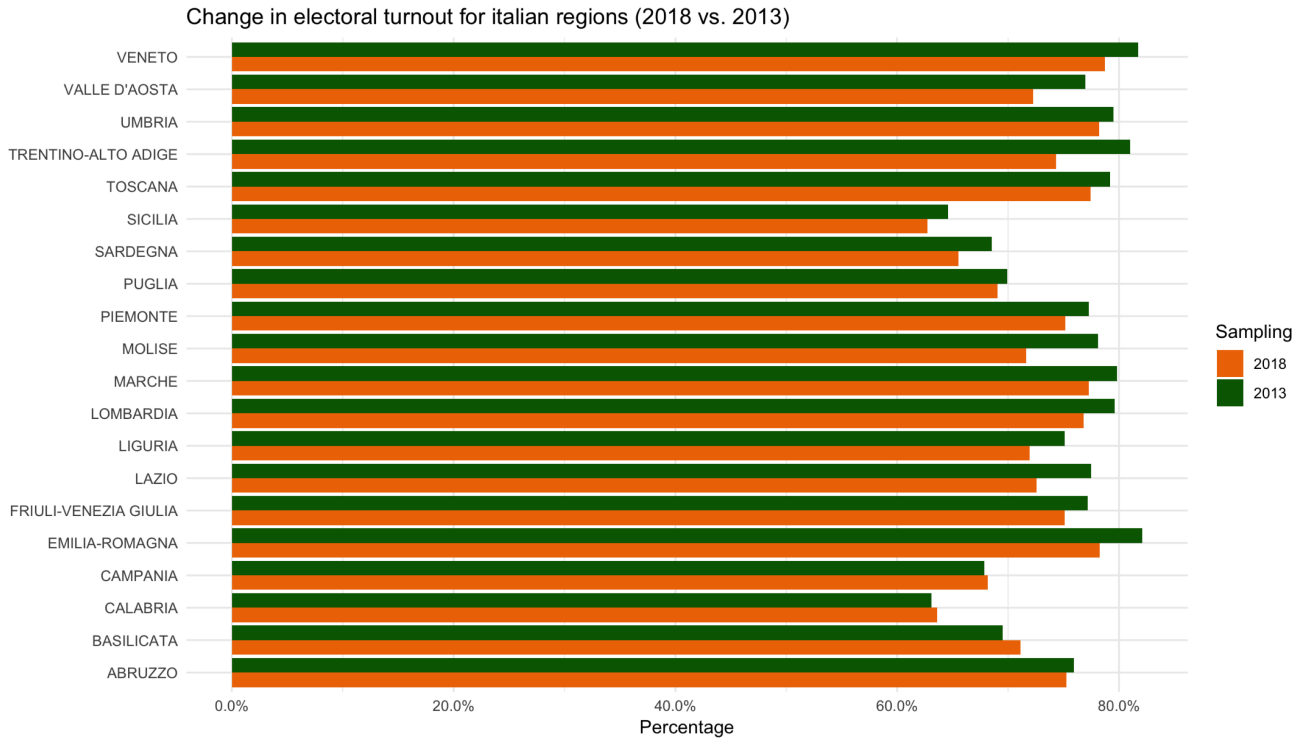
Slope chart



Dumbbell plot

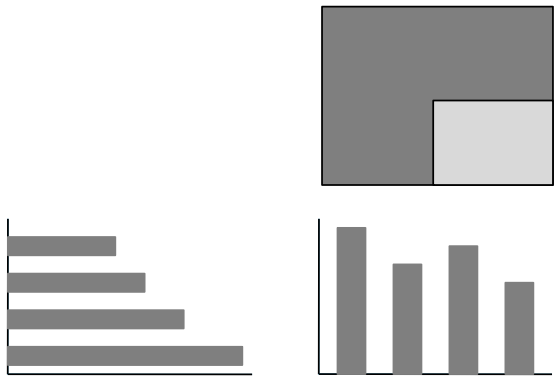


Clustered bars

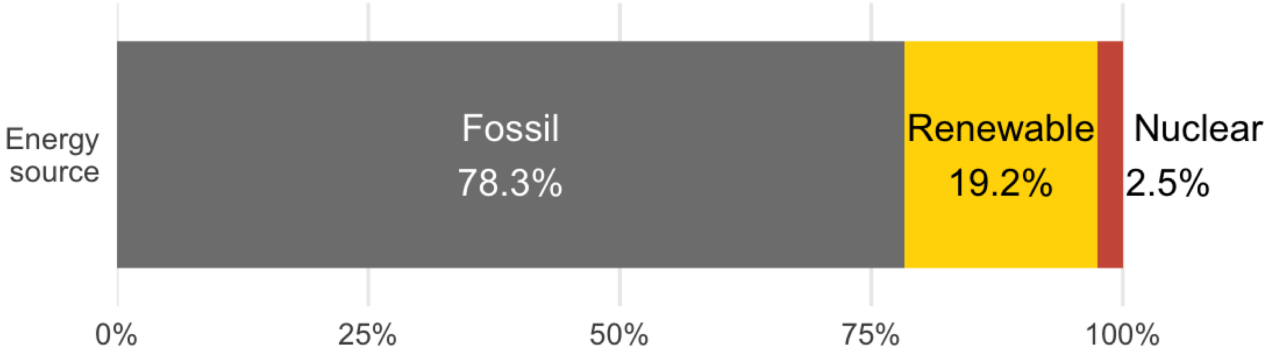


Proportion (Part-to-whole)

- Best unit: percentage
- Stacked bar graph
  - Difficult to read individual values
- Stacked area
- Treemap
- Gridplot
- Pie / Donut
- Marimekko

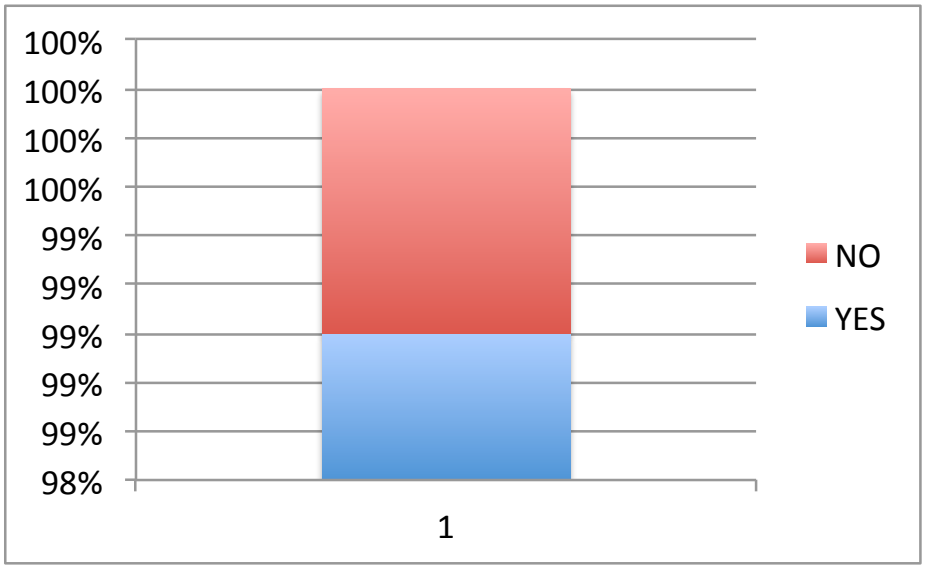


Length – Stacked Bar

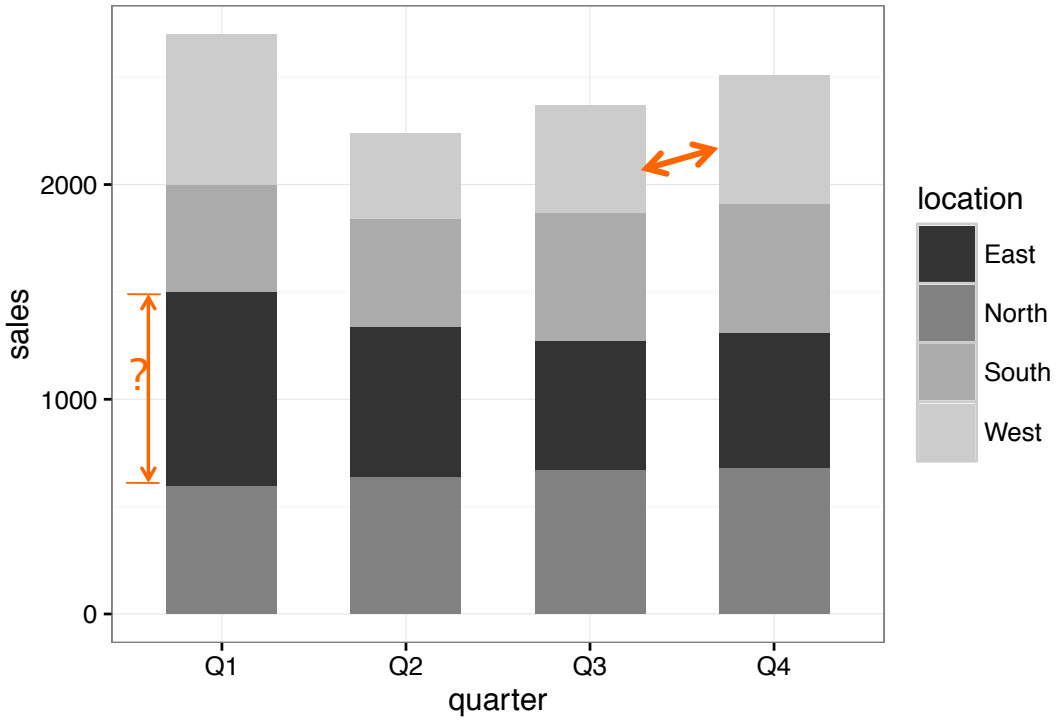


Beware MS-Excel Default

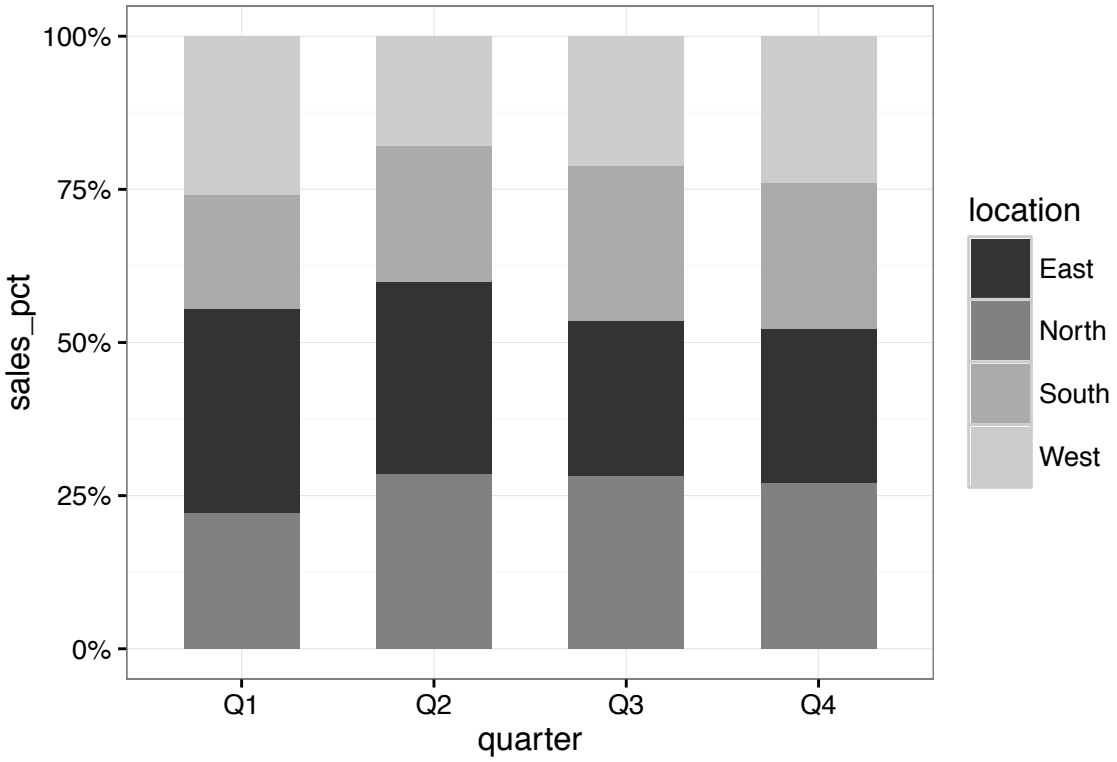
	A	B
1	YES	99%
2	NO	1%



Stacked bar graph

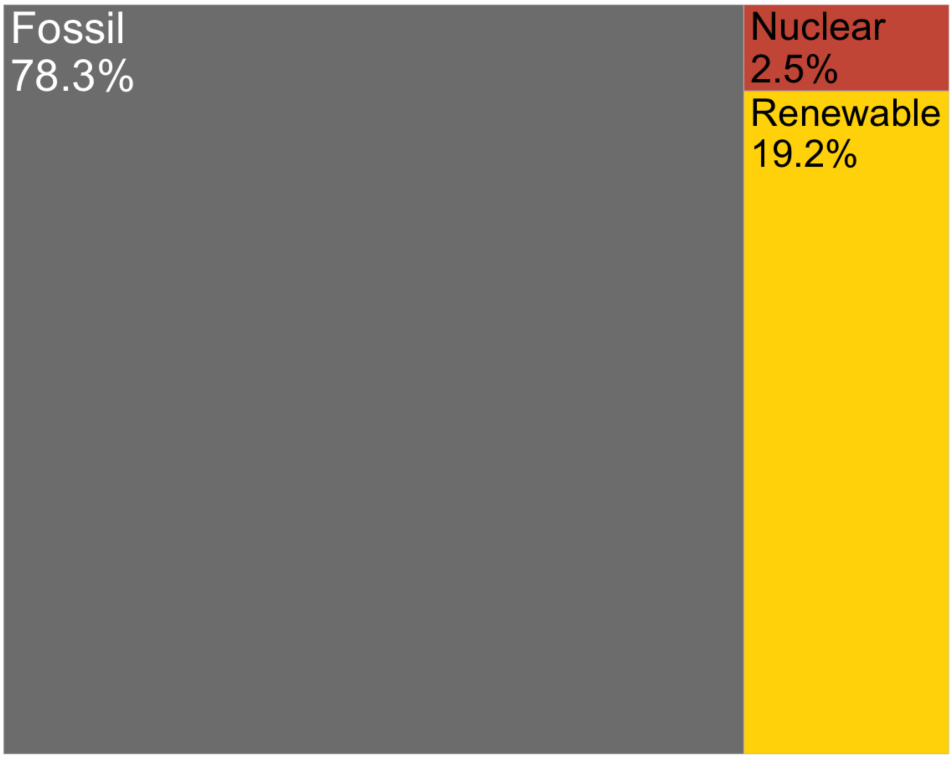


Stacked bars w/percentage

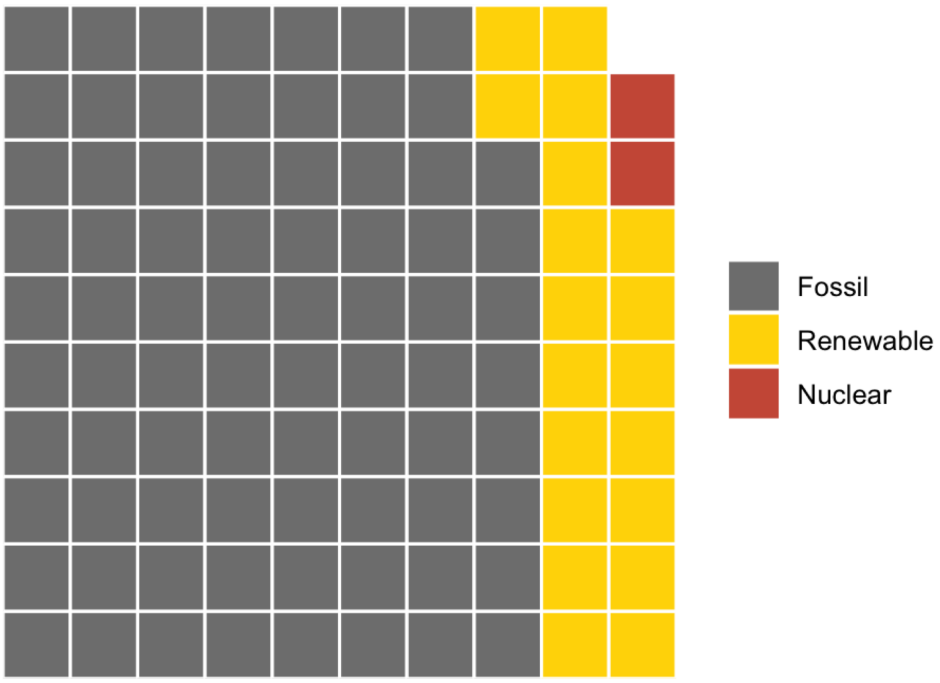


Area - Treemap

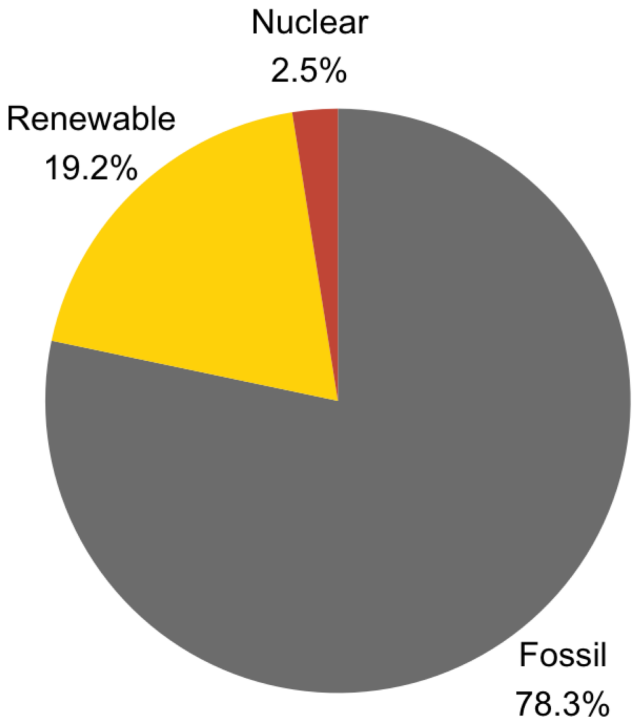
Area – Treemap



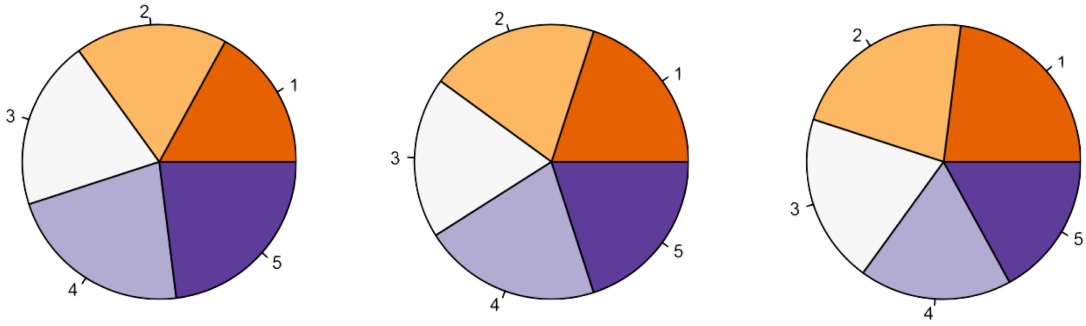
Area + Count – Waffle / Grid



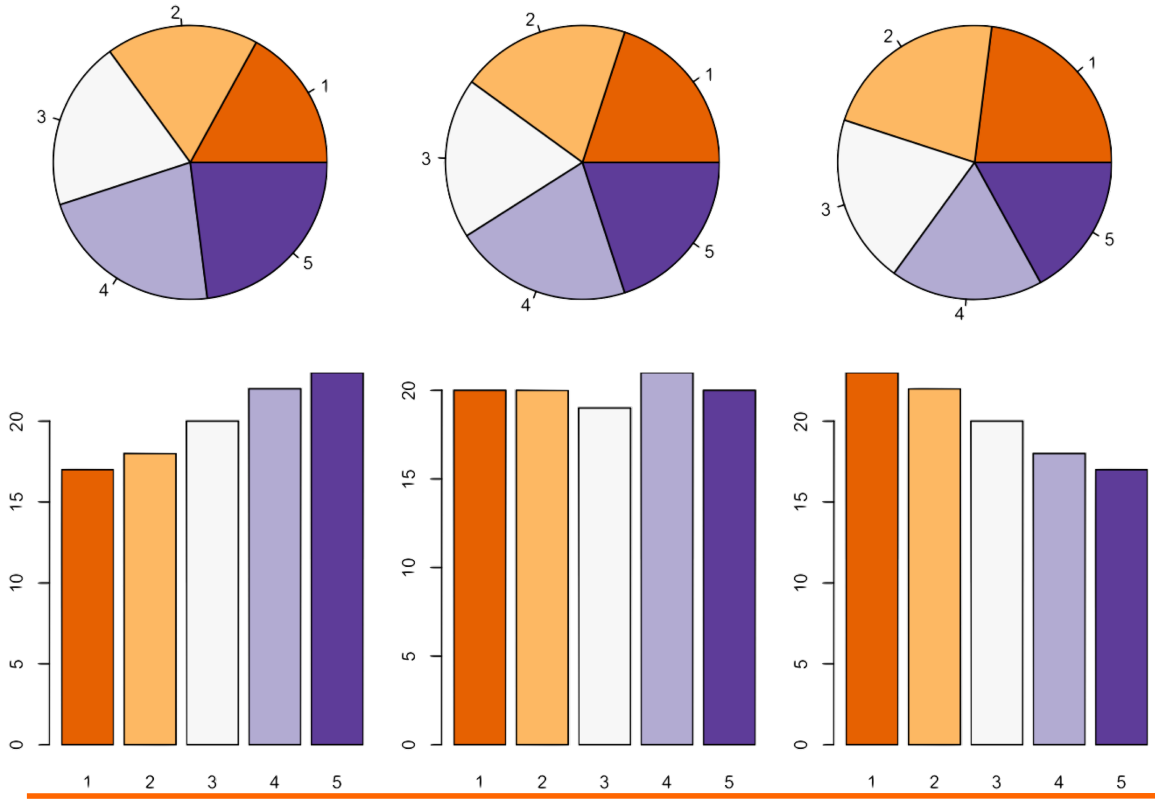
Area + Angle – Pie Chart



Pies



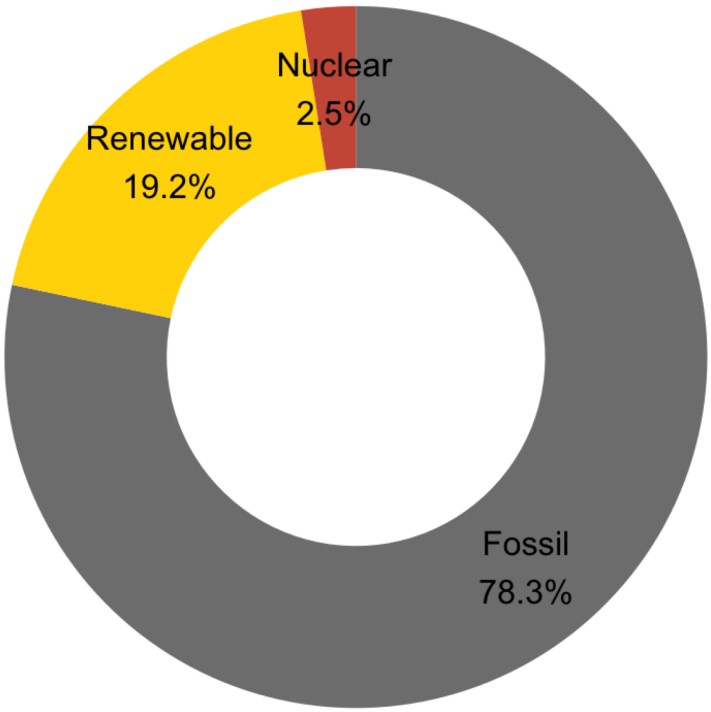
Pies vs. Bars



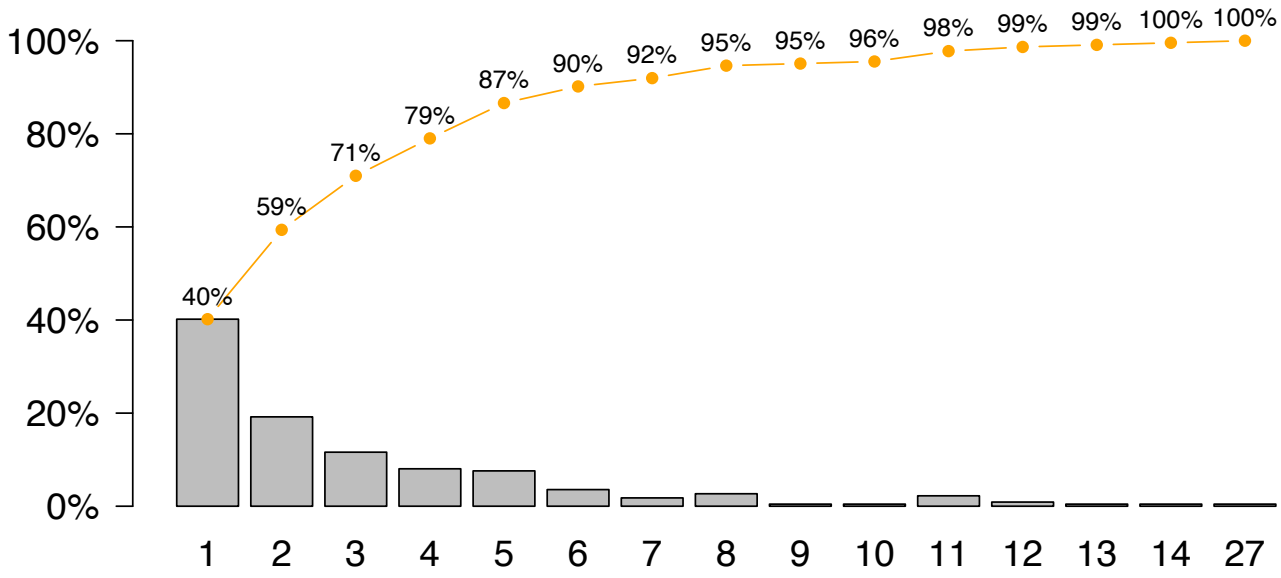
Pie Charts: guidelines

- Have serious limitations
  - To represent part-whole relationship
  - Only with a small number of categories
    - Up to four
    - Avoid rainbow pie
  - When proportions are distinct enough
- Remember to ease reading
  - Labels placed close to slices
  - Labels include values (percentages)

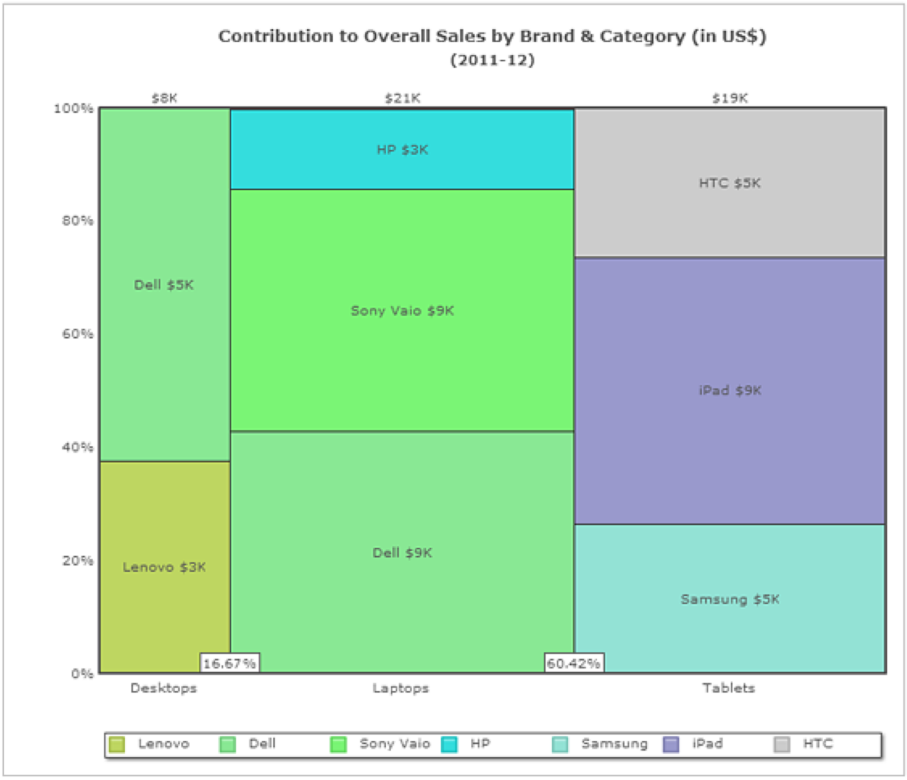
Area/Angle/Length – Donut



Pareto chart



Marimekko Chart



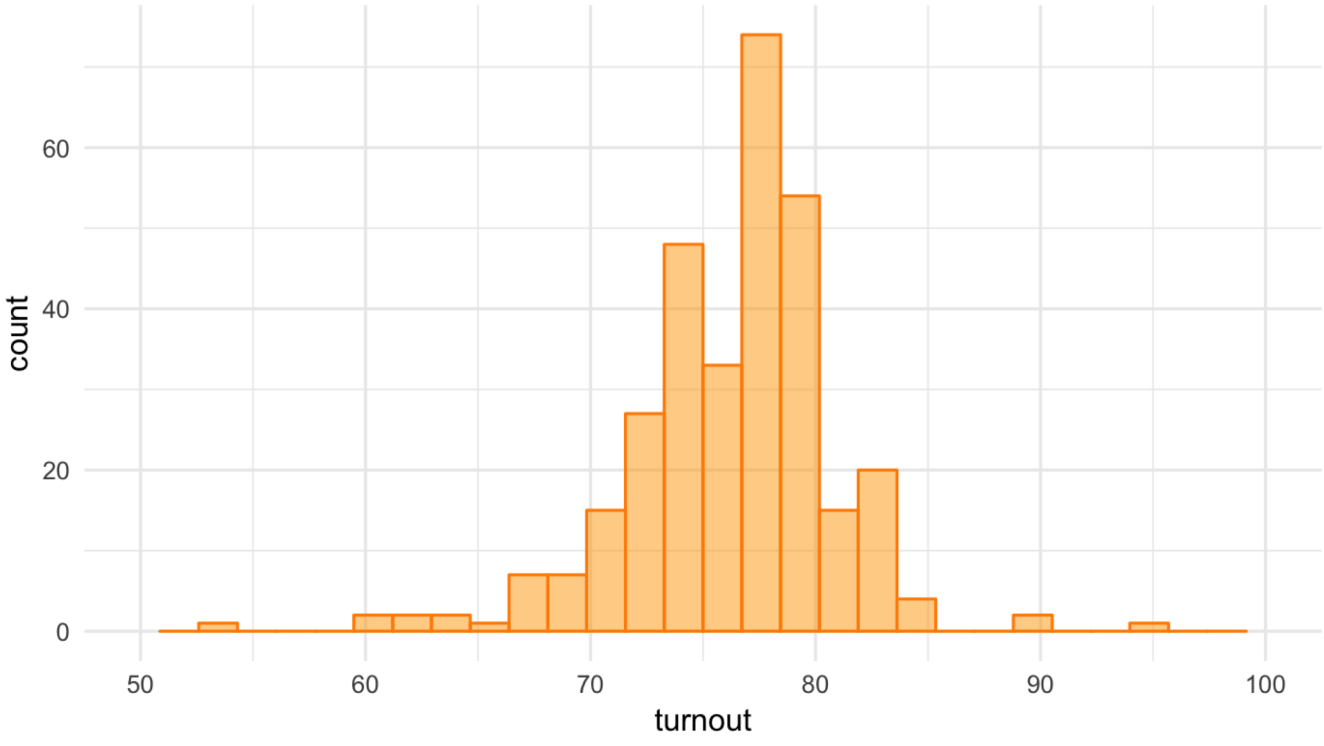
Distribution

- Two main types
  - Show distribution of single set of values
  - Show and compare two or more distributions

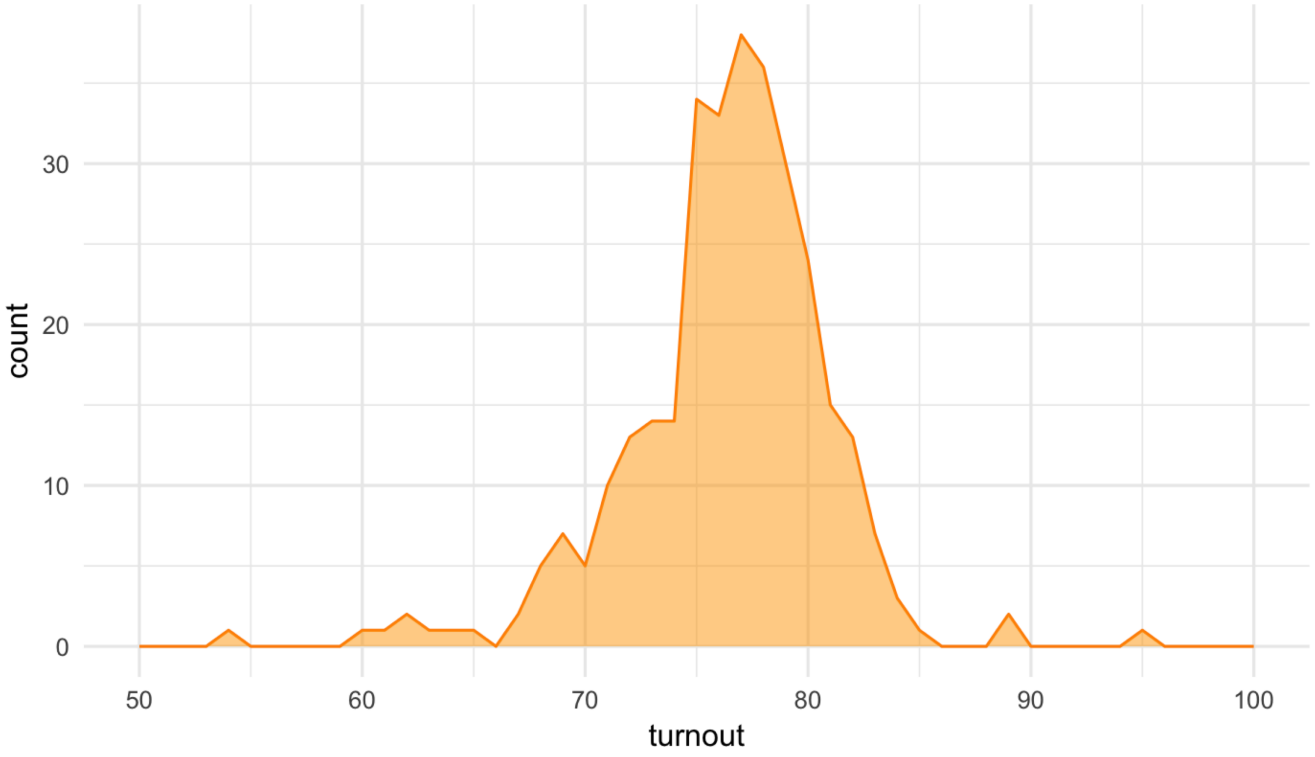
Single distribution

- Histogram
  - Vertical bar graph
  - Frequency for subdivision
    - Quantitative ranges
    - Categories
  - Emphasis on number of occurrences
- Frequency polygon
  - Line graphs
  - Frequency density function
  - Emphasis on the shape of the distribution
- Boxplot
  - Summary

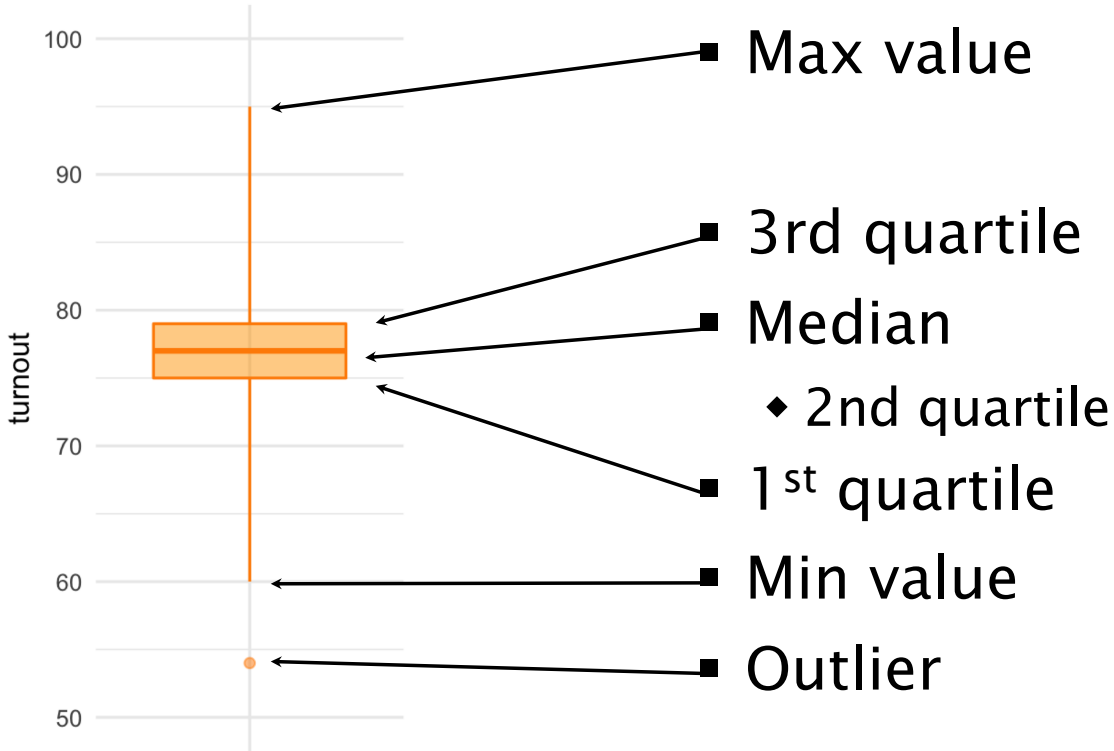
Histogram



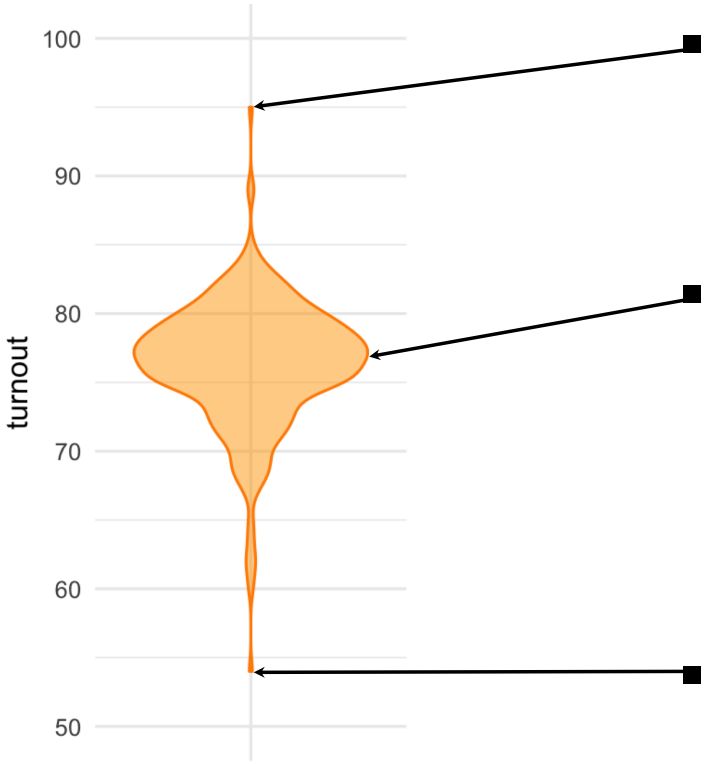
Frequency polygon



Boxplot

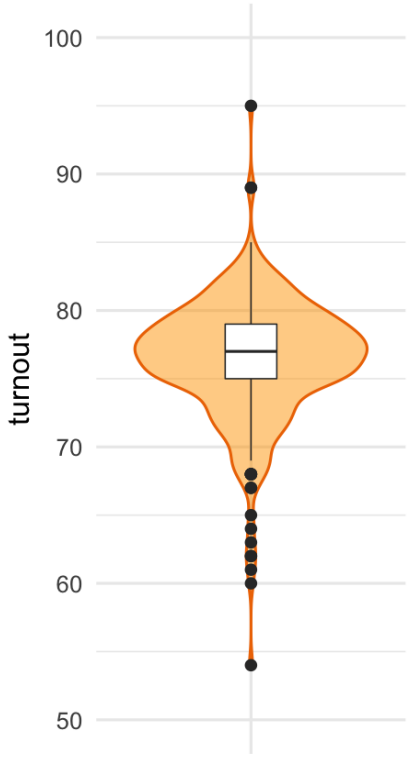


Violin plot



- Max value
- Frequency polygon
  - mirrored
- Min value

Violin + Boxplot

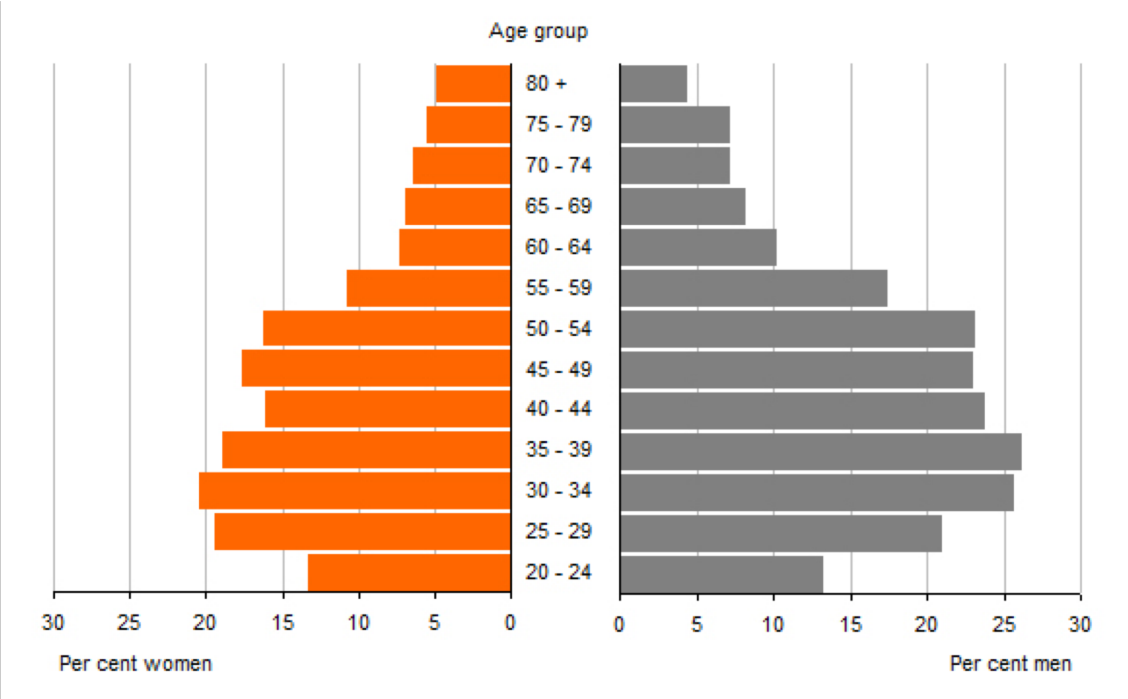


- Overlaying a box plot over the violin provides additional details

Multiple distribution

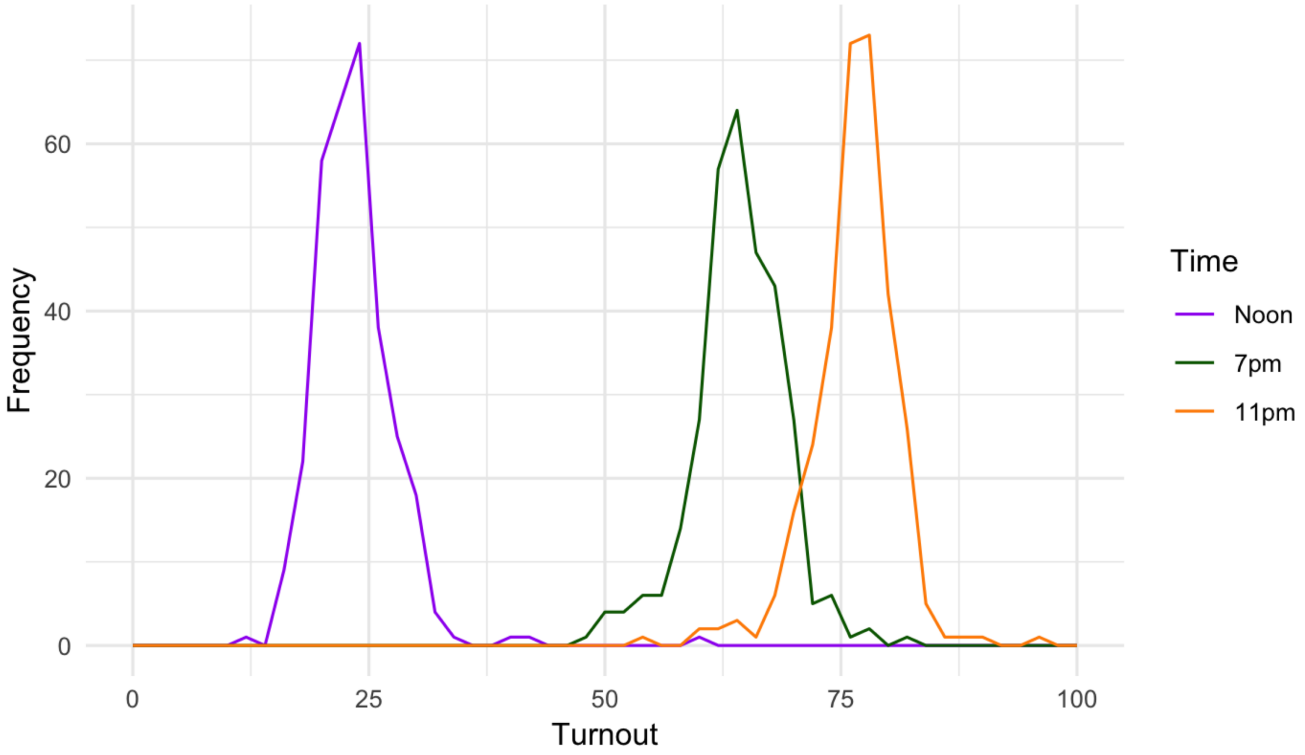
- Histogram is not suitable
- Frequency polygon
  - Line graphs
  - Frequency density function
- Boxplot
  - Summary
  - Less distracting with high number of categories

Paired diverging bargraph

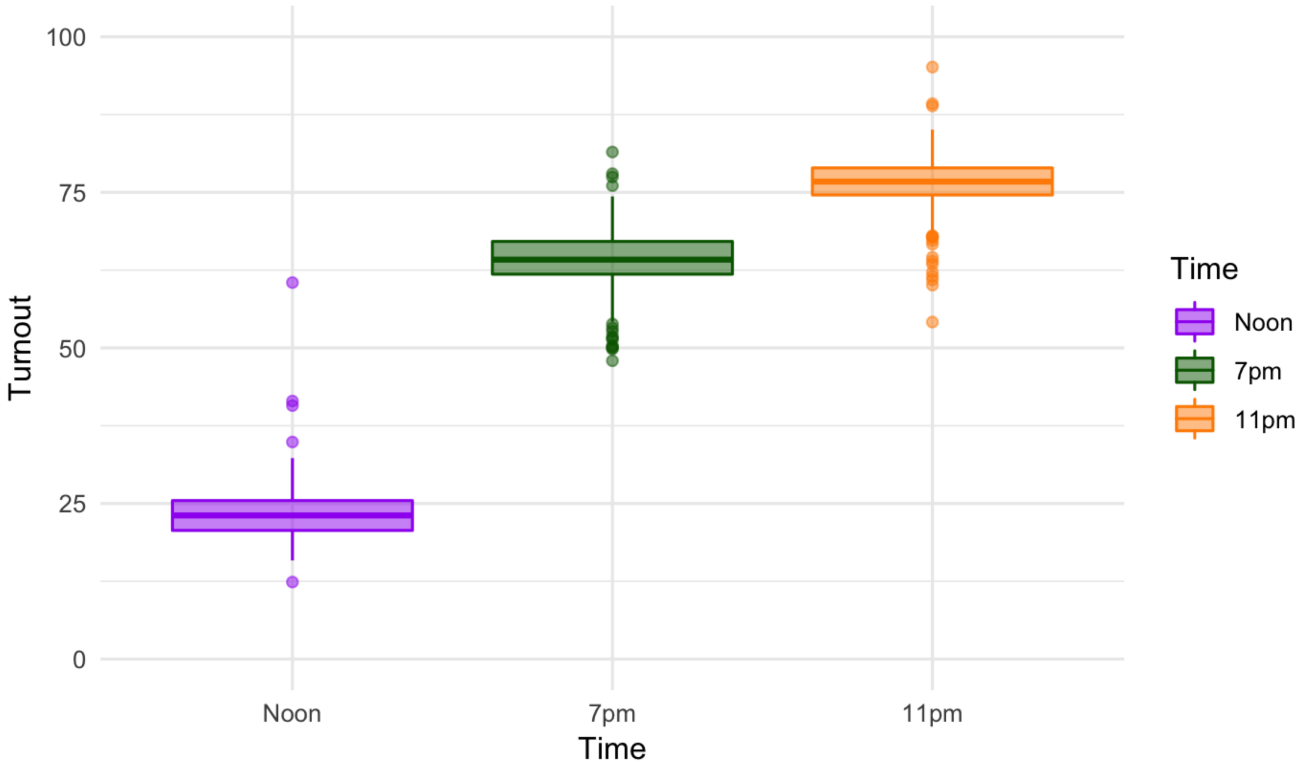


https://unstats.un.org/unsd/genderstatmanual/Print.aspx?Page=Presentation-of-gender-statistics-in-graphs

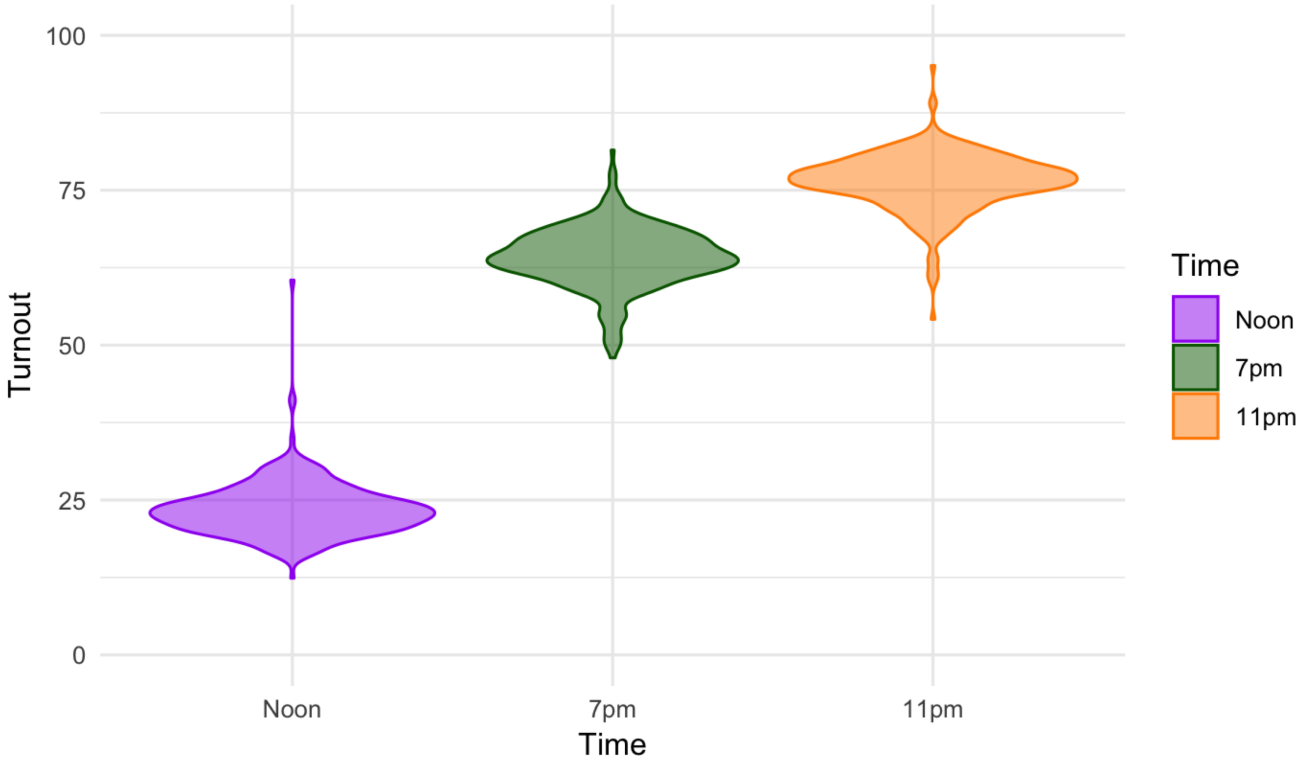
Multiple Frequency polygons



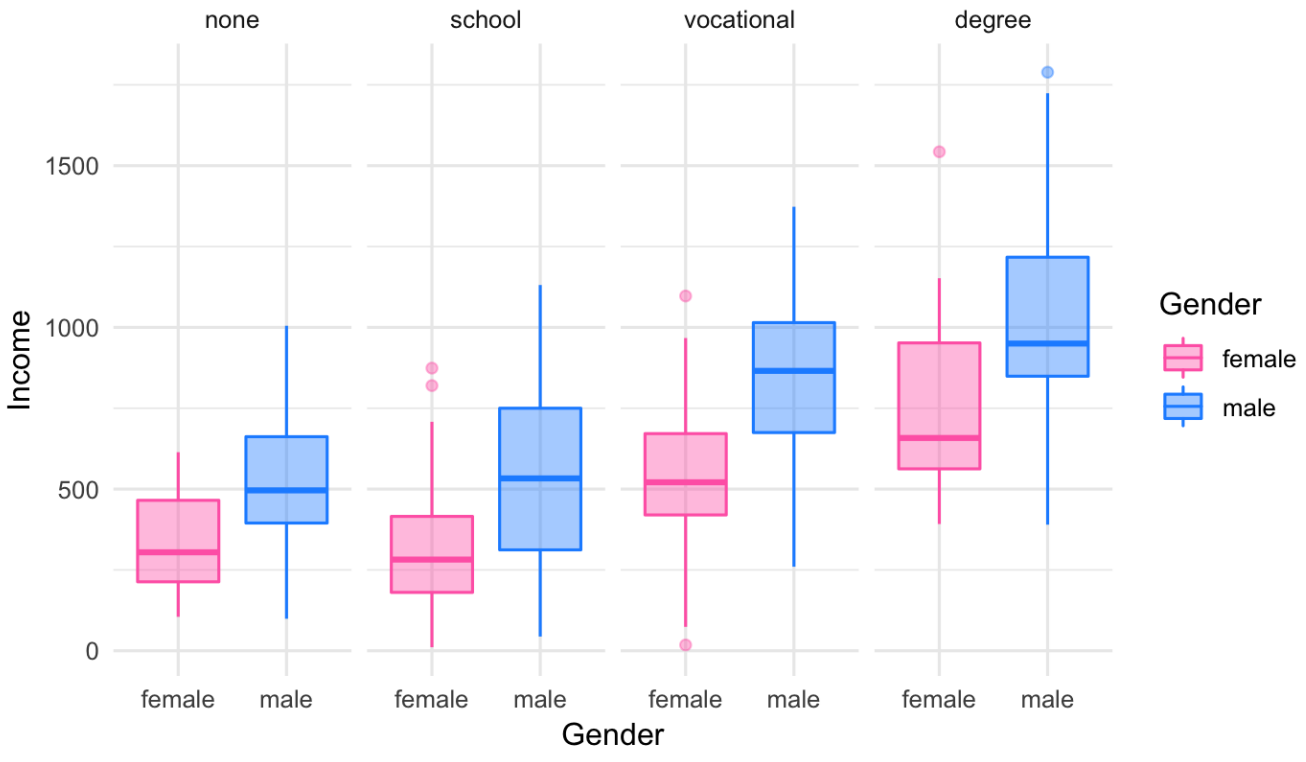
Multiple Box plot



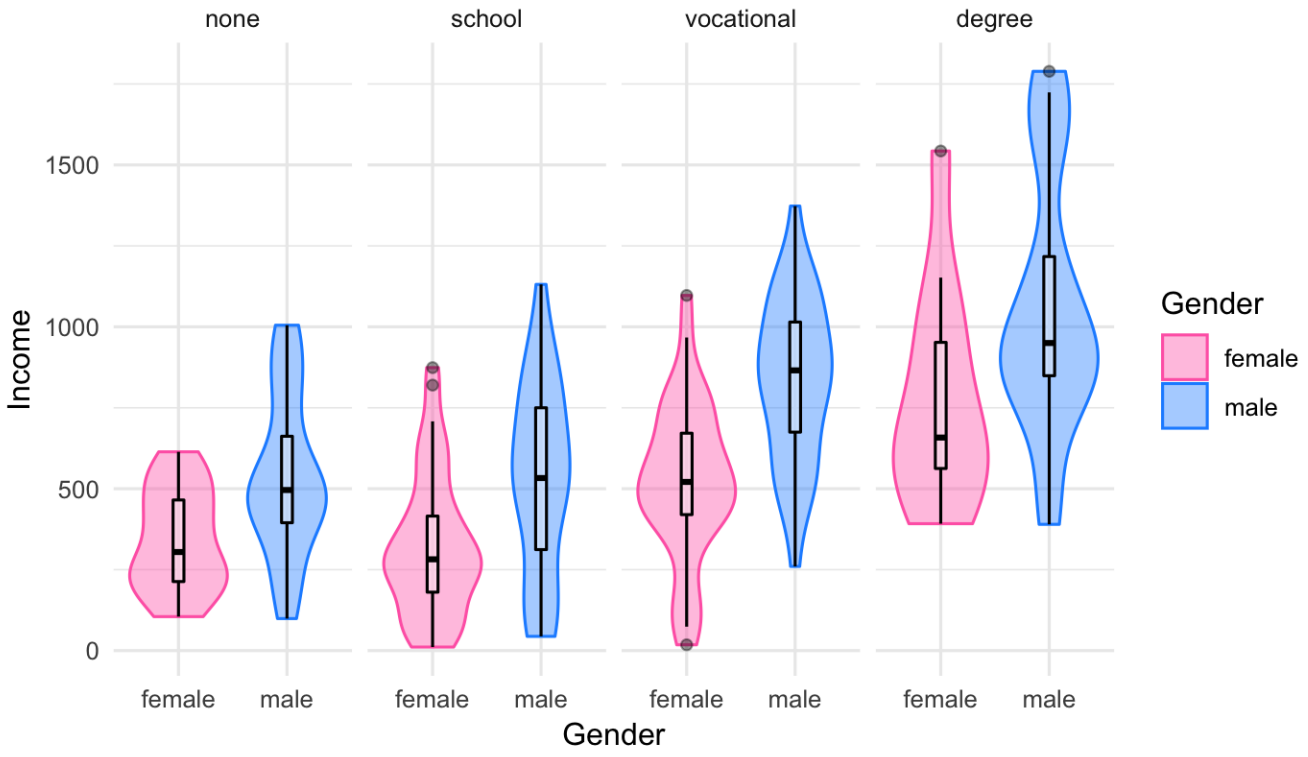
Violin plot



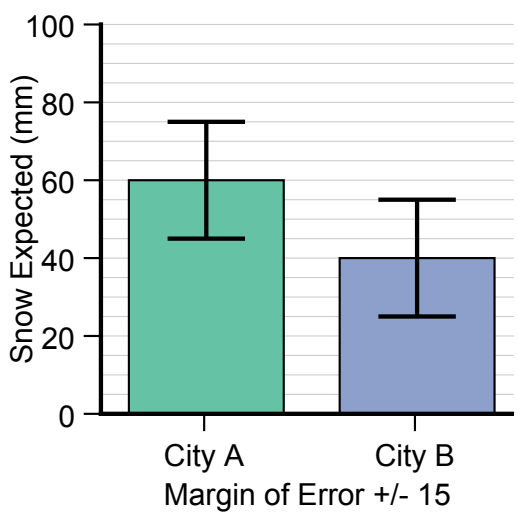
Multiple box plots

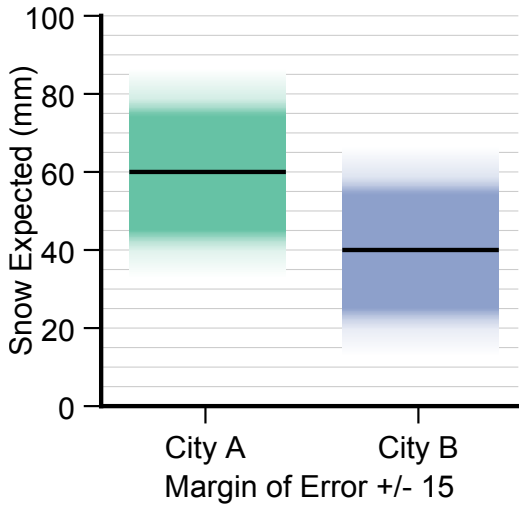


Multiple violin plots



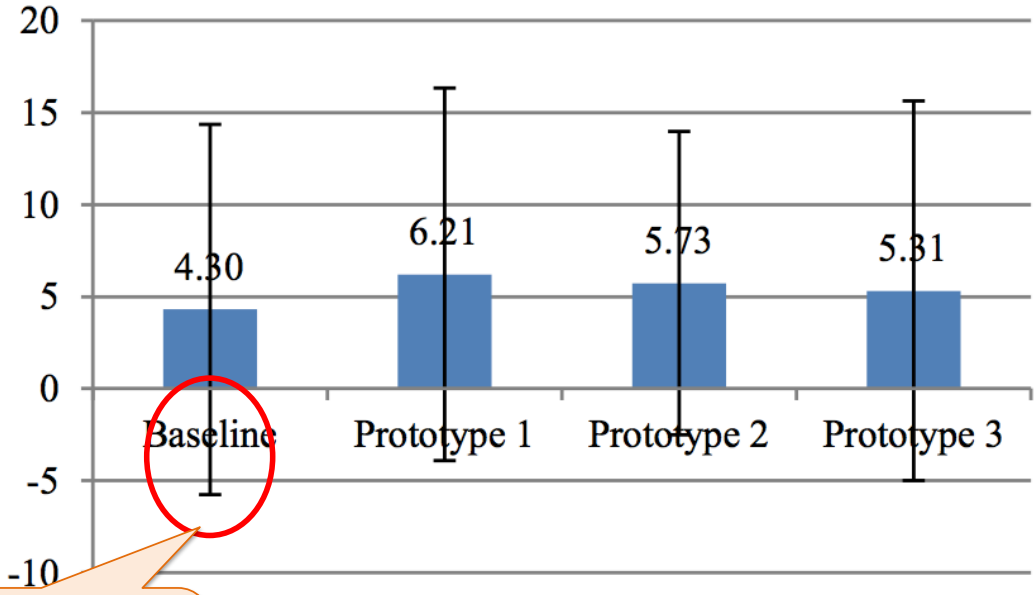
Confidence Intervals





Error Bars Considered Harmful: Exploring Alternate Encodings for Mean and Error
Michael Correll, and Michael Gleicher
IEEE Transactions on Visualization and Computer Graphics, Dec. 2014

Interval may be Asymmetric



It is physically impossible to modify −6 files

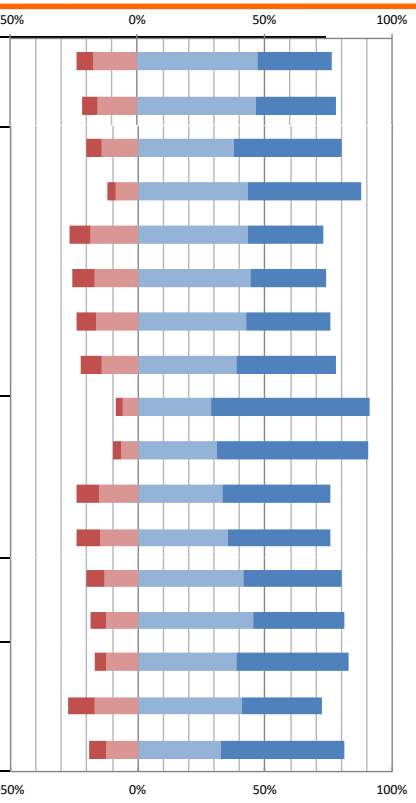
Figure 5. Mean files per changeset.

Likert / Agreement

- Likert scale:
  - Measures agreement / disagreement with a given statement
  - Response on an ordinal scale, e.g.
    - Definitely No
    - Mostly No
    - Undecided
    - Mostly Yes
    - Definitely Yes
- Often used to measure positive vs. negative perception

Diverging stacked bars

Macroarea	N°	Domanda	
Organizzazione del periodo didattico	1	Il carico di studio complessivo degli insegnamenti previsti nel periodo didattico è accettabile?	D1
	2	L'orario degli insegnamenti del periodo didattico è ben organizzato?	D2
Organizzazione di questo insegnamento	3	Le regole d'esame, gli obiettivi e il programma dell'insegnamento sono stati resi noti in modo chiaro?	D3
	4	L'insegnamento è stato svolto in maniera coerente con quanto dichiarato sul portale della didattica?	D4
	5	Le conoscenze preliminari da me possedute sono risultate sufficienti per la comprensione della materia ?	D5
	6	Il carico di studio richiesto da questo insegnamento è proporzionato ai crediti assegnati?	D6
	7	Il materiale didattico, indicato o fornito, è adeguato per lo studio della materia?	D7
	8	Le attività didattiche integrative (esercitazioni, lab, seminari, visite, ecc.) sono utili per l'apprendimento della materia?	D8
Efficacia del docente	9	Il docente rispetta gli orari di svolgimento dell'attività didattica?	D9
	10	Il docente è disponibile a fornire chiarimenti e spiegazioni?	D10
	11	Il docente interagisce efficacemente con gli studenti, stimolando l'interesse verso la materia?	D11
	12	Il docente espone gli argomenti in modo chiaro?	D12
Infrastrutture	13	Le aule in cui si svolgono le lezioni sono adeguate?	D13
	14	I locali e le attrezzature per le attività didattiche integrative sono adeguati?	D14
Interesse e soddisfazione	15	Sono interessato agli argomenti di questo insegnamento? (indipendentemente da come è stato svolto)	D15
	16	Sono soddisfatto di come è stato svolto questo insegnamento?	D16
	17	Al fine dell'apprendimento, la frequenza alle attività didattiche è utile?	D17

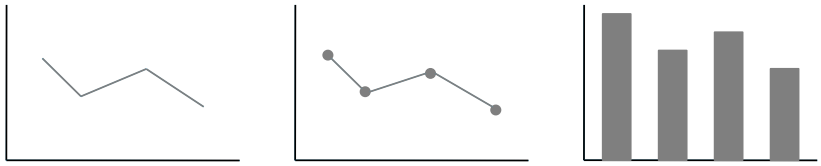


Time series

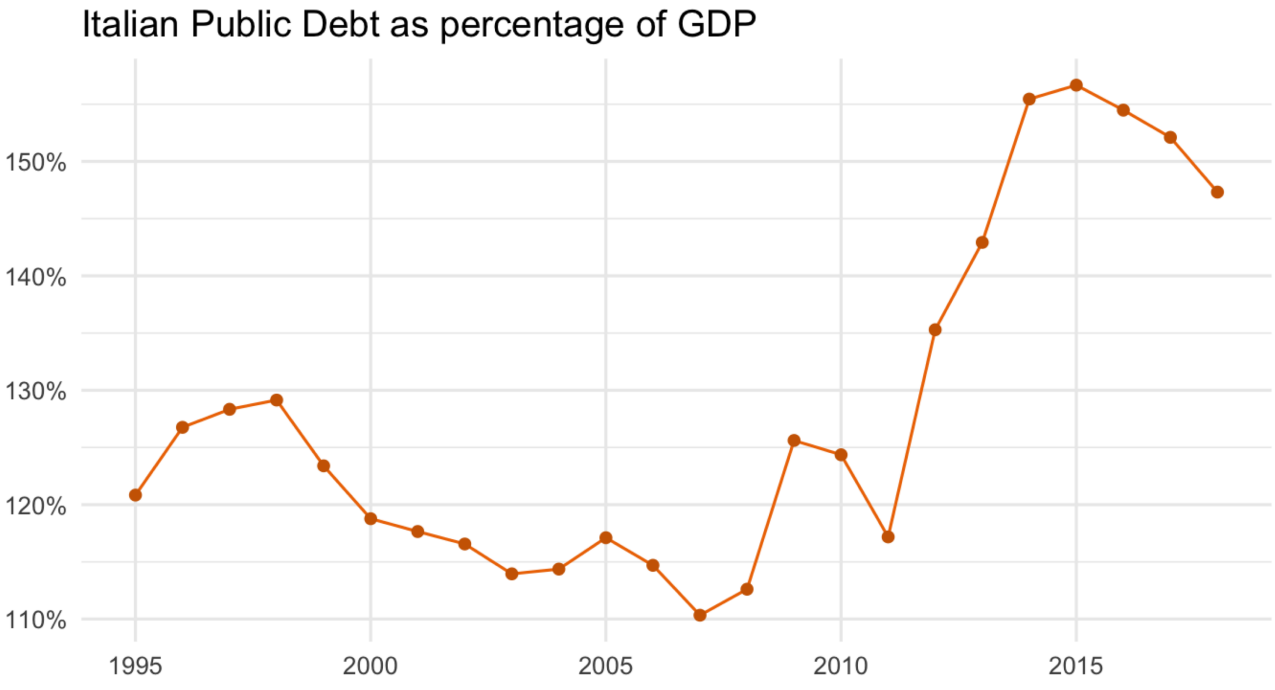
- Series of relationships between quantitative values that are associated with categorical subdivisions of time
- Communicate
  - Change
  - Rise
  - Increase
  - Fluctuate
  - Grow
  - Decline
  - Decrease
  - Trend

Time series

- Time grows from left to right
  - Cultural convention
- Vertical bars
  - highlight individual points in time
  - hide overall trend

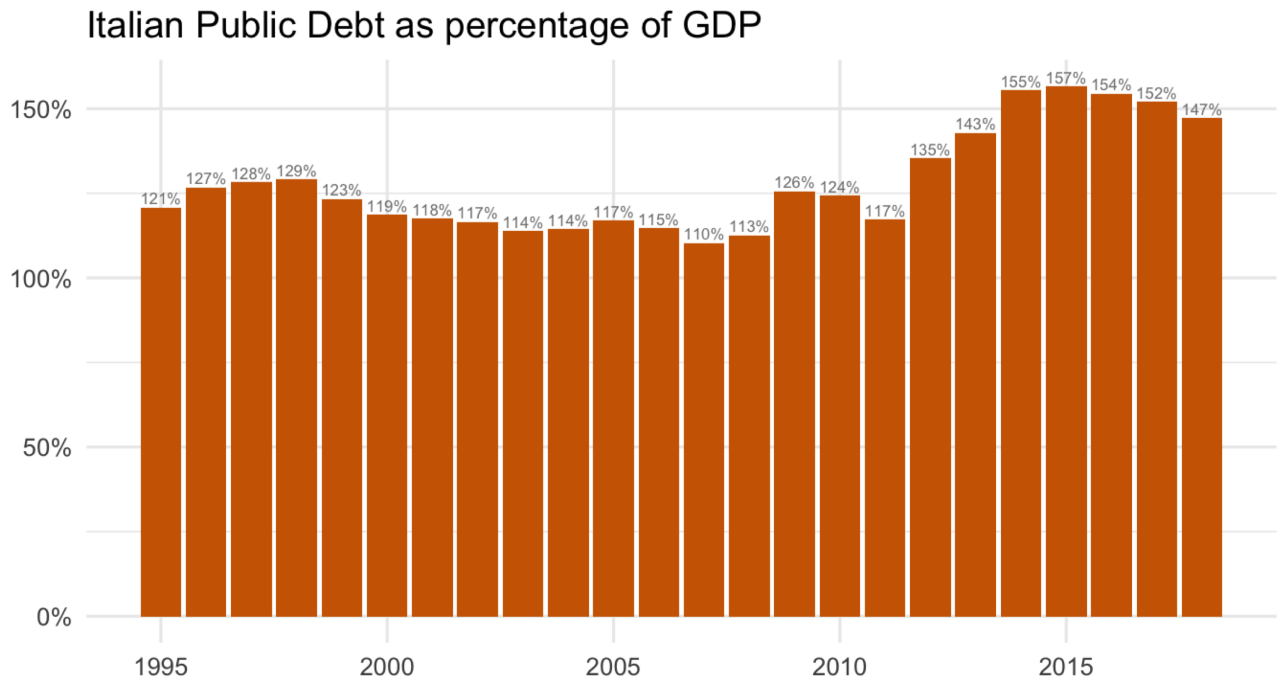


Line plot



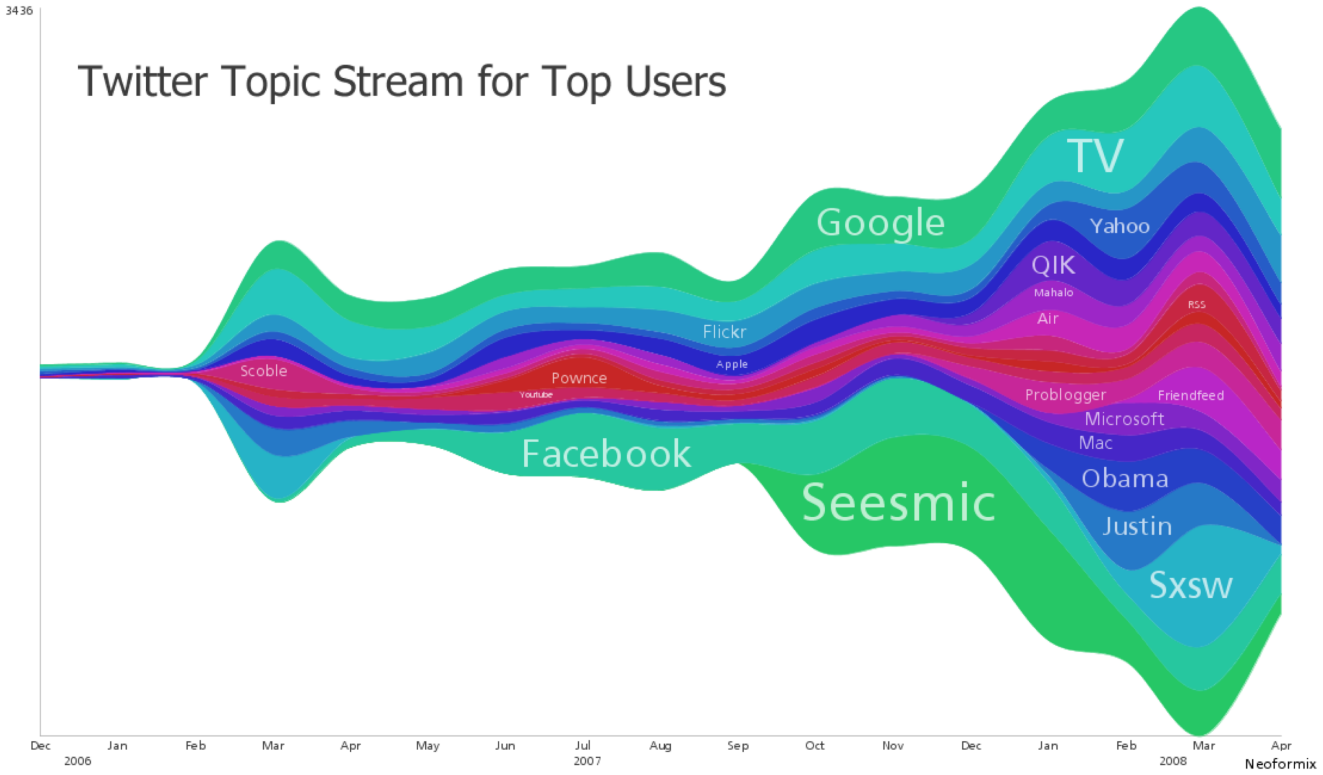
Source: OECD - https://data.oecd.org/chart/5M2J

Bars



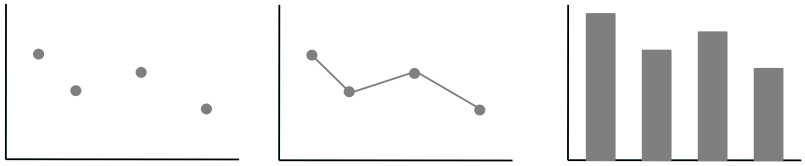
Source: OECD - https://data.oecd.org/chart/5M2J

Streamgraph

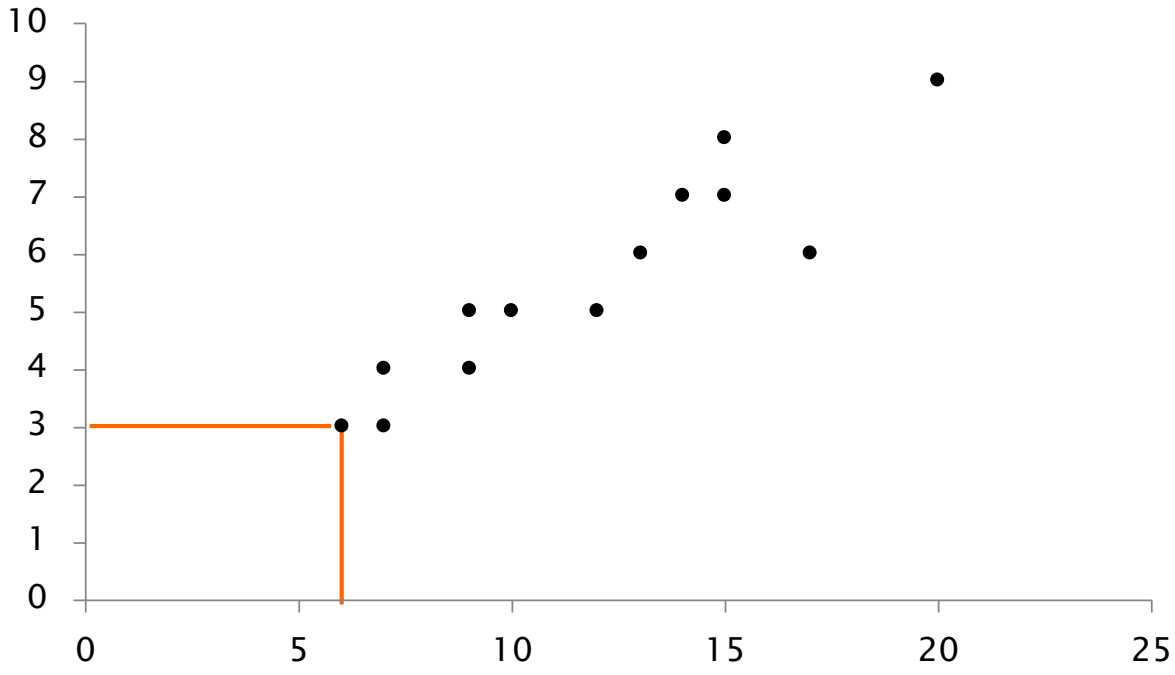


Correlation

- Relationships between two paired sets of quantitative values
  - Scatter plot w/possible trend line
    - Ok for educated audience
  - Paired bar graph



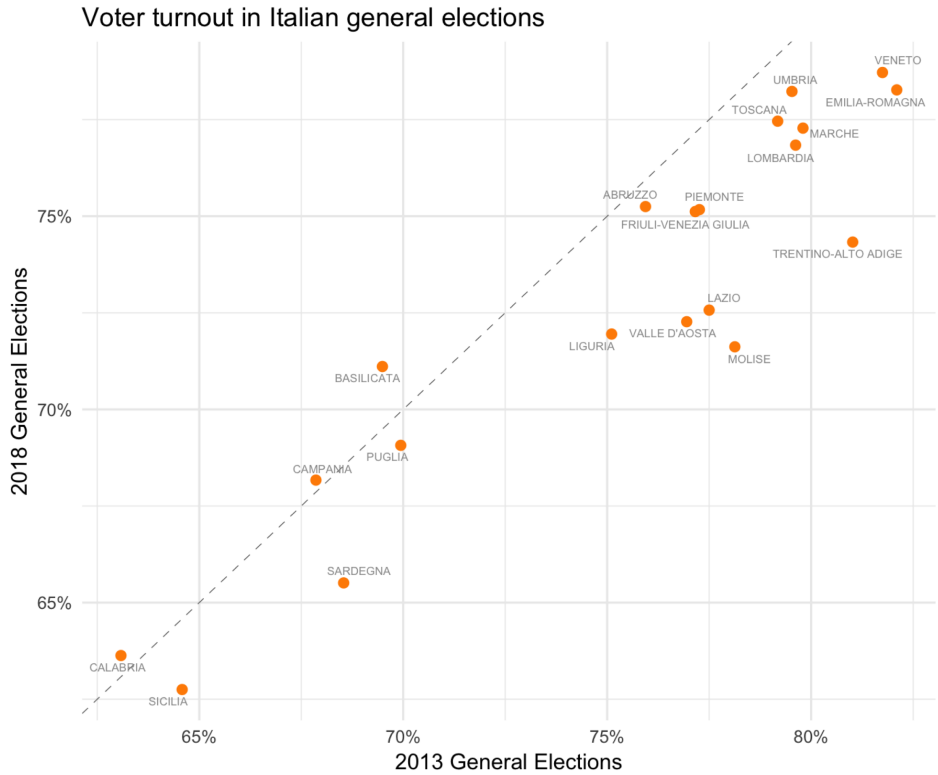
Points



Points Guidelines

- Points must be clearly distinguished
  - Enlarge points
  - Select radically distinct shapes (✚ ○)
  - Balance size of points and graph
  - Use outlined shapes
- Lines must not obscure points

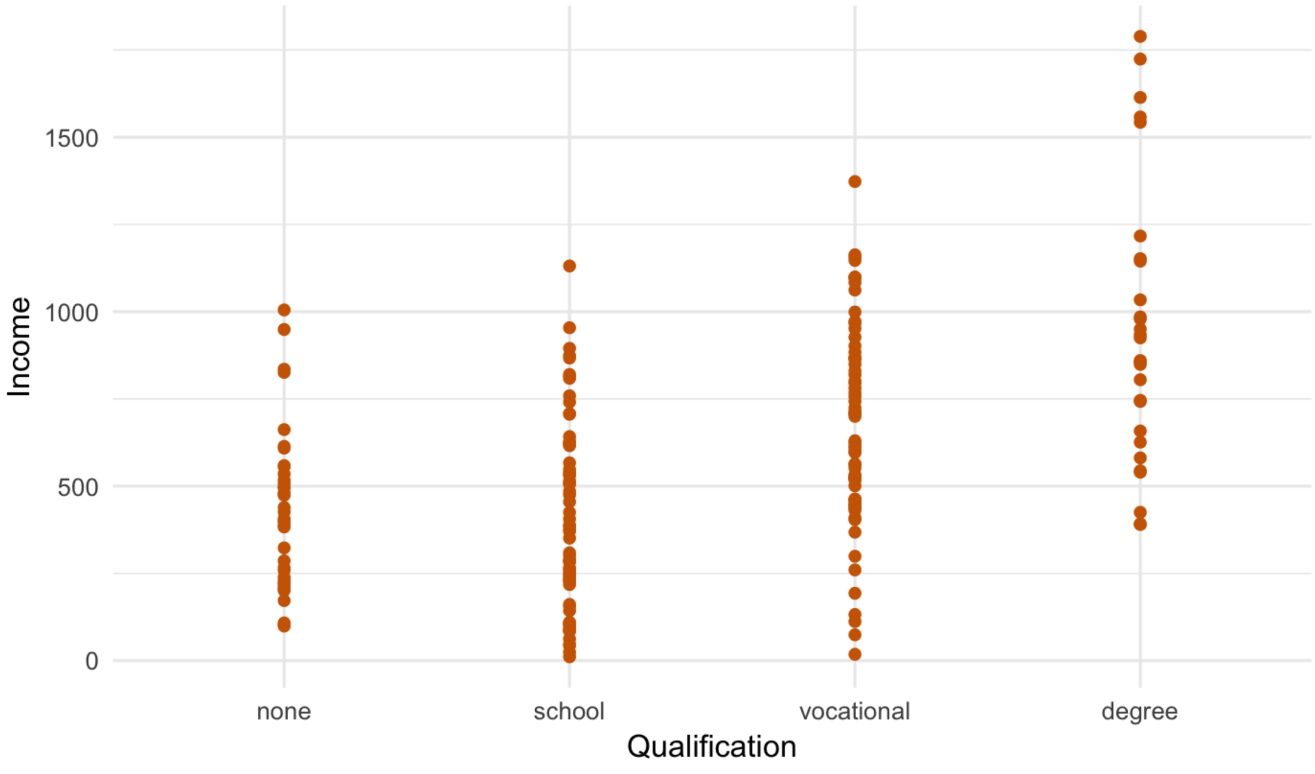
Scatter plot



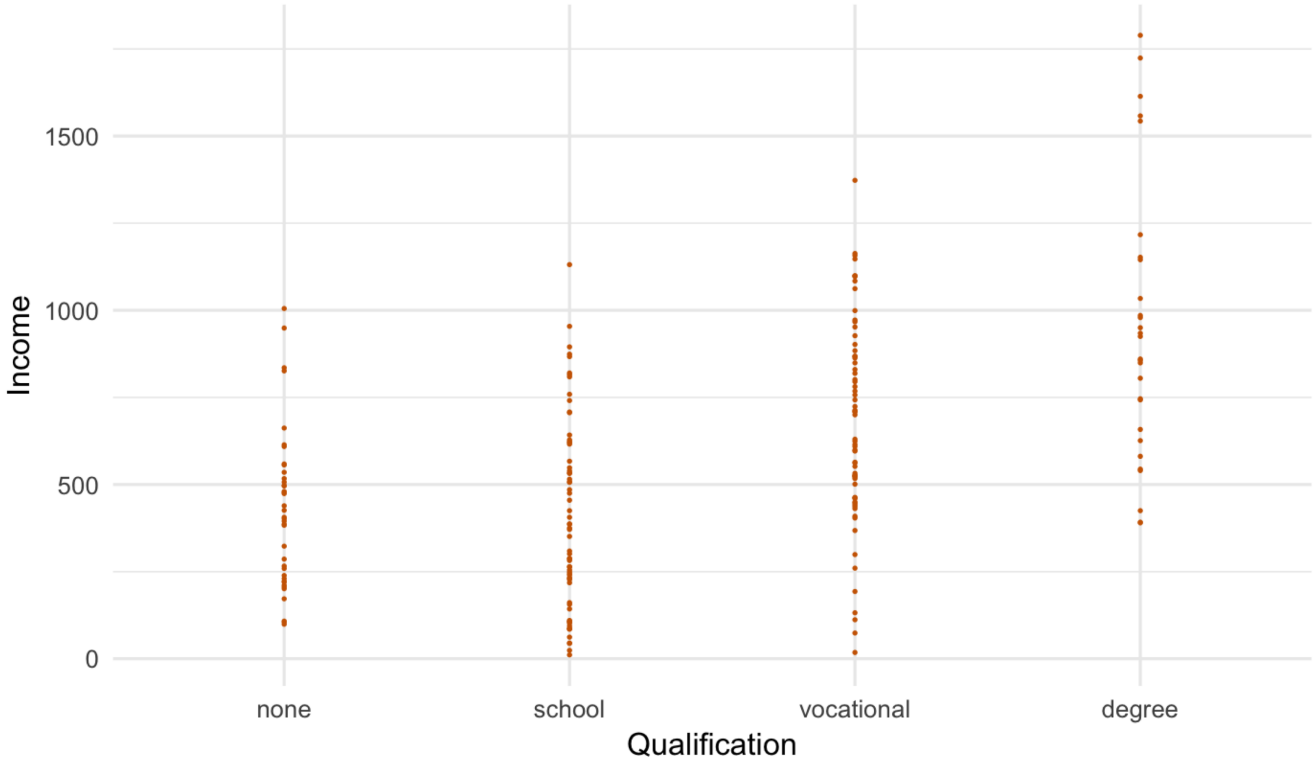
Overplotting

- Phenomenon related to multiple points (or shapes) overlapping
  - Discrete (integer) measure
  - Very large dataset
- Solutions
  - Small shapes
  - Outlined shapes
  - Transparent shapes (alpha)
  - Jittering

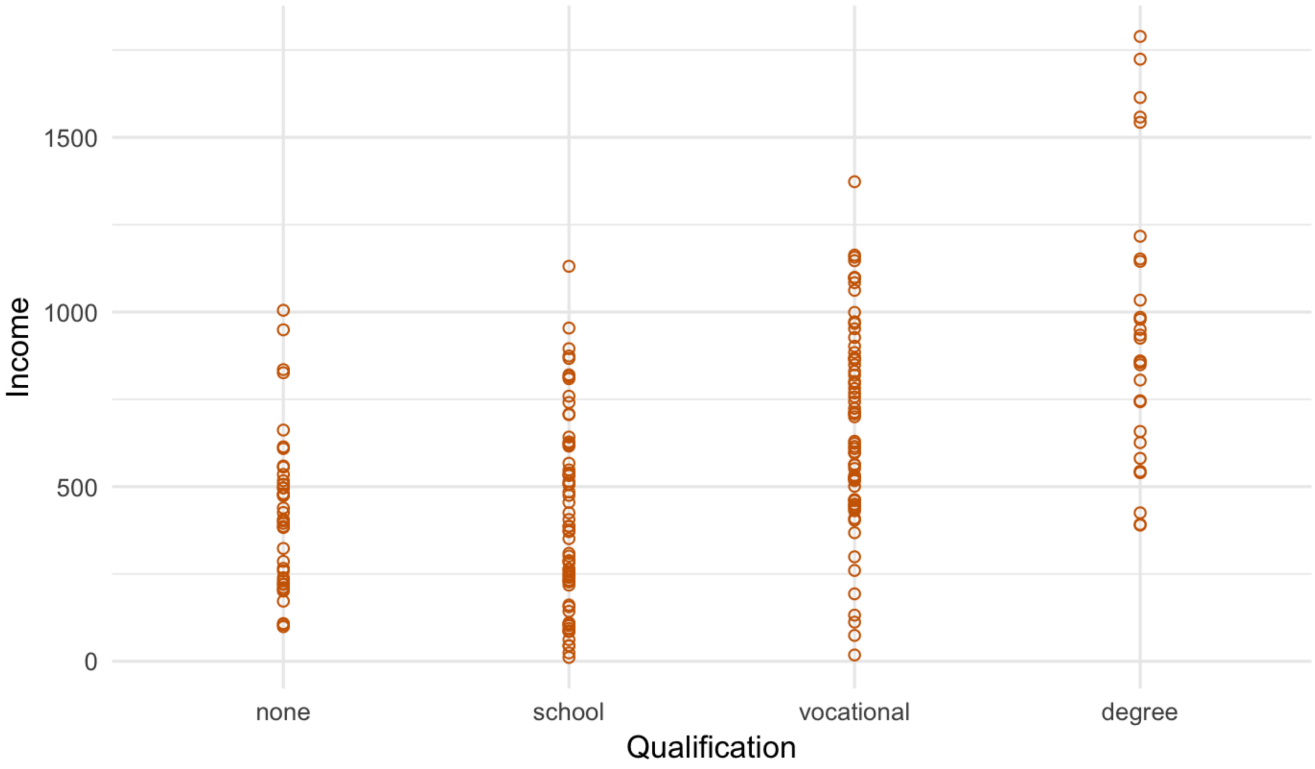
Overplotting example



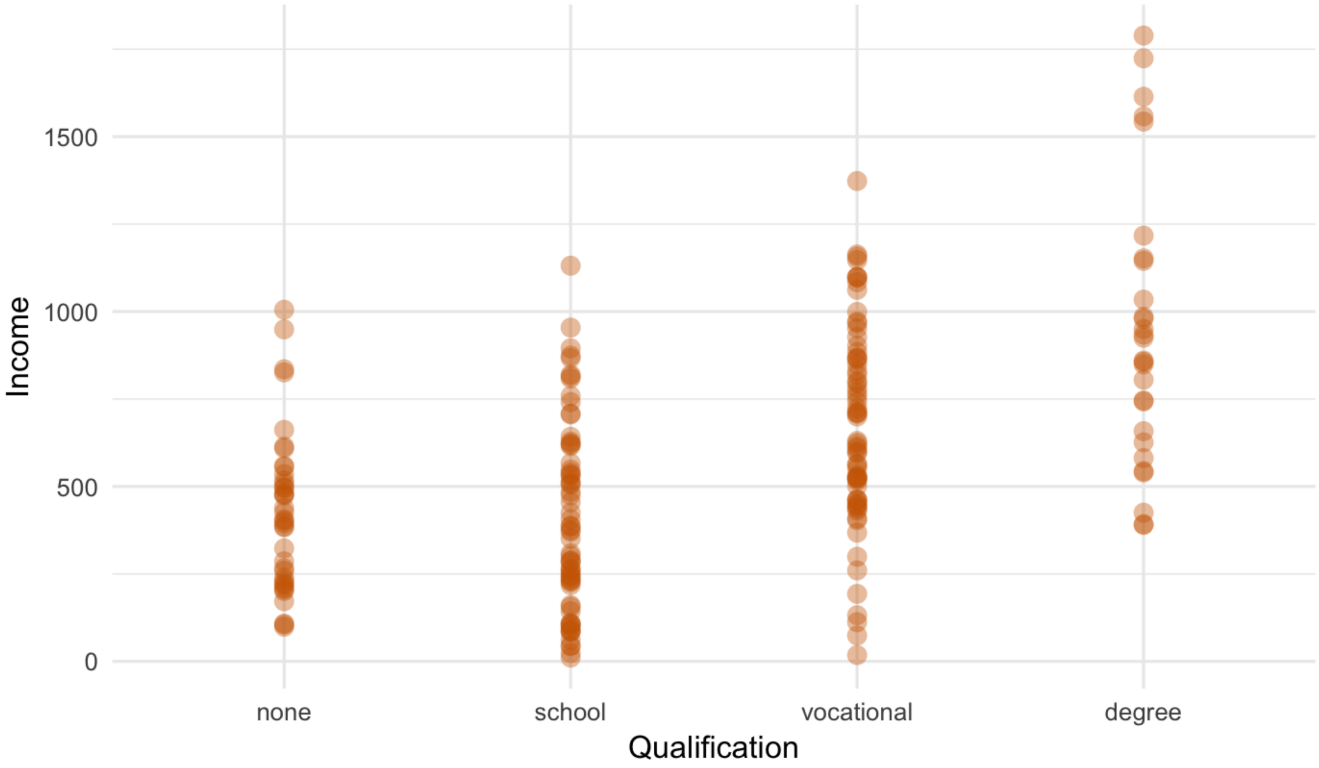
Overplotting – Small



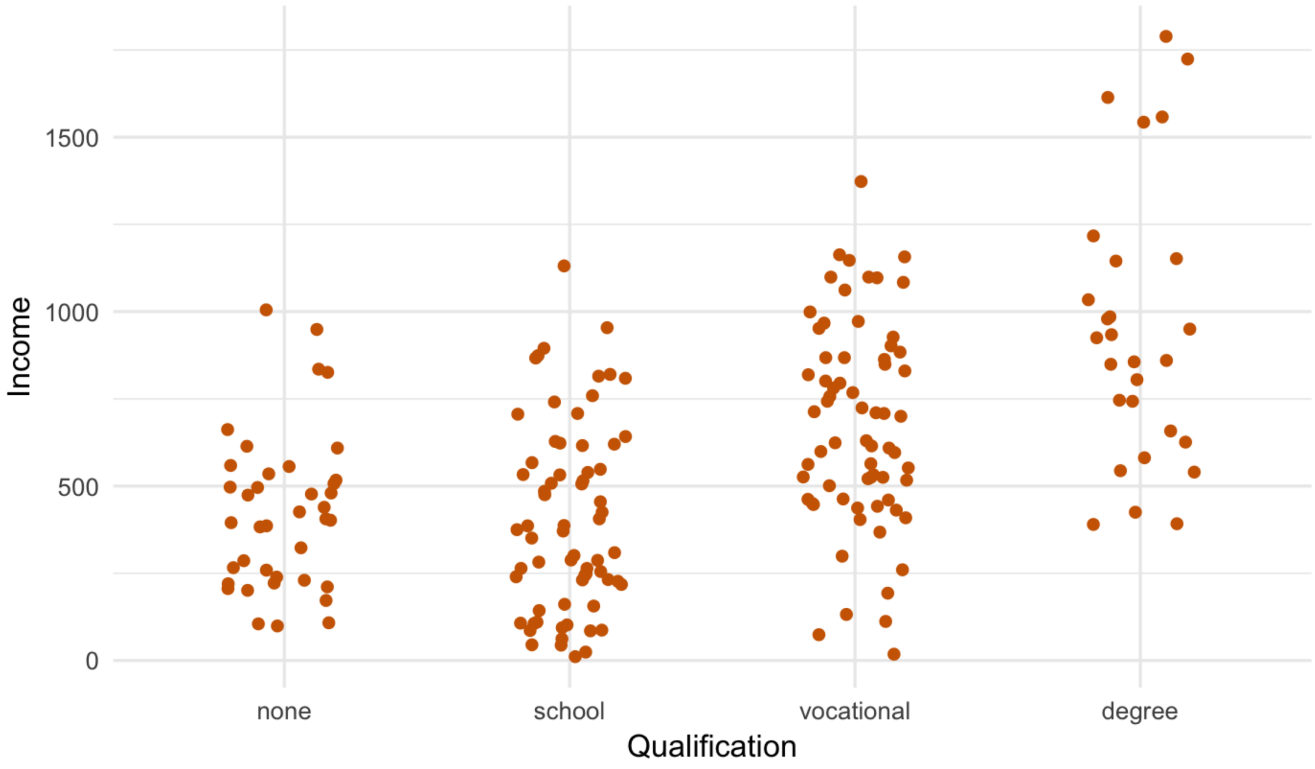
Overplotting – Outlined



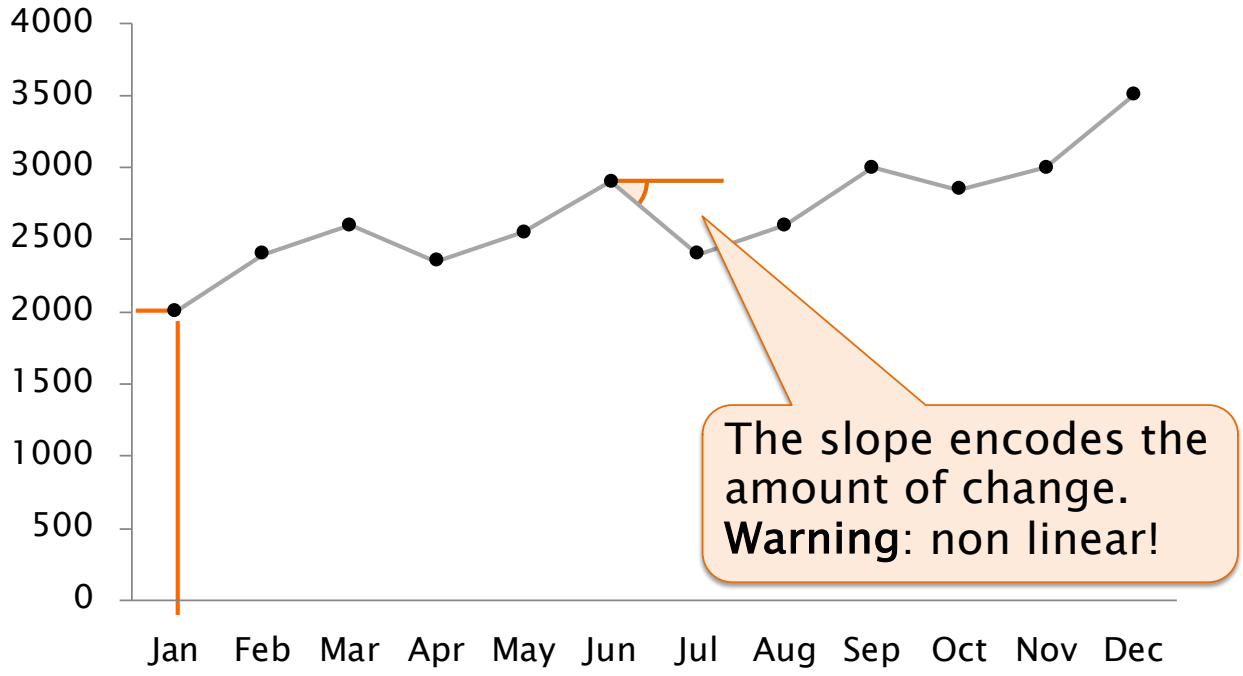
Overplotting – Transparent



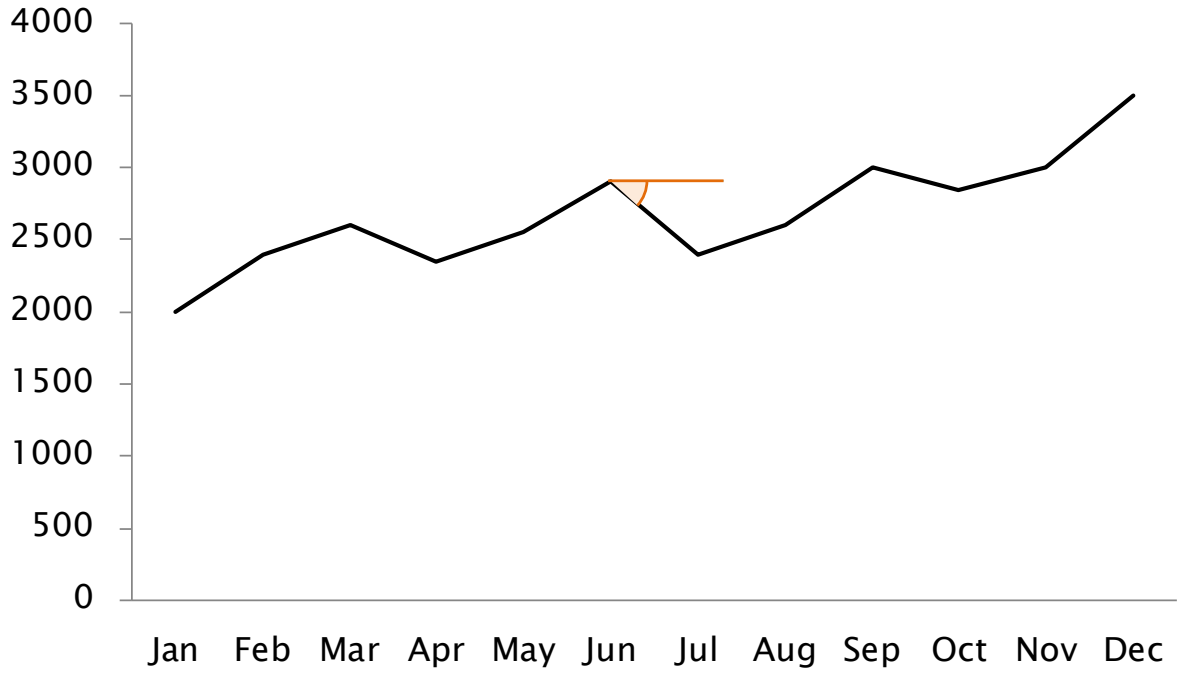
Overplotting – Jittering



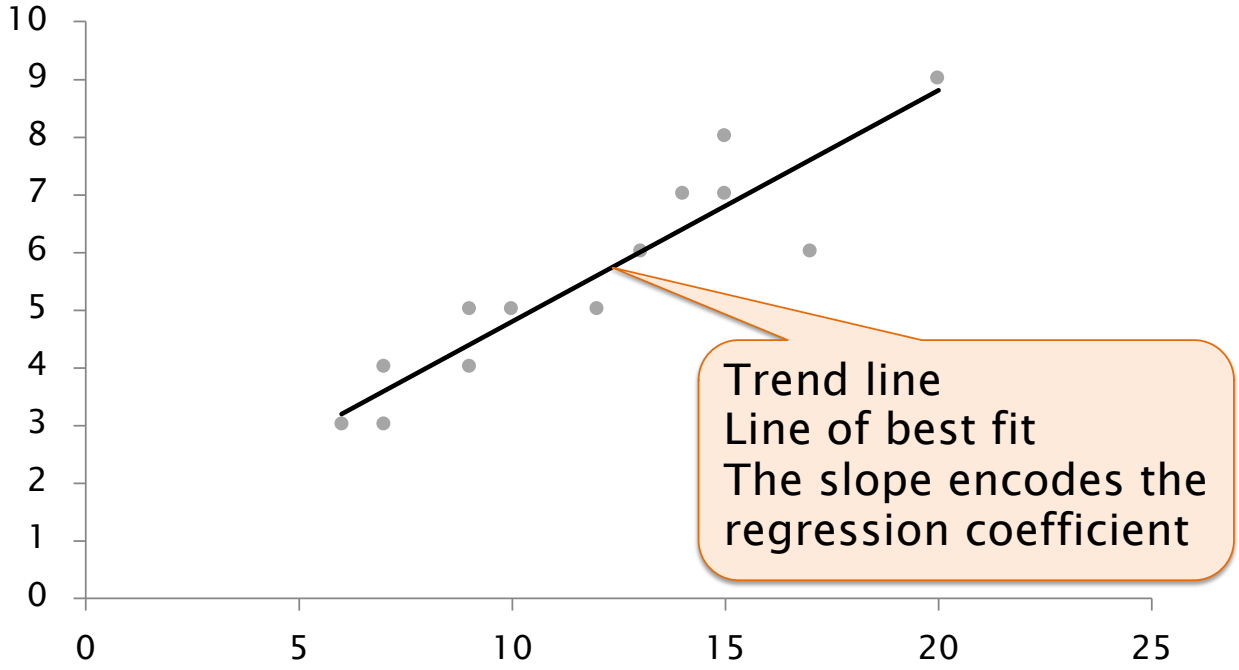
Points and Lines



Slope of lines



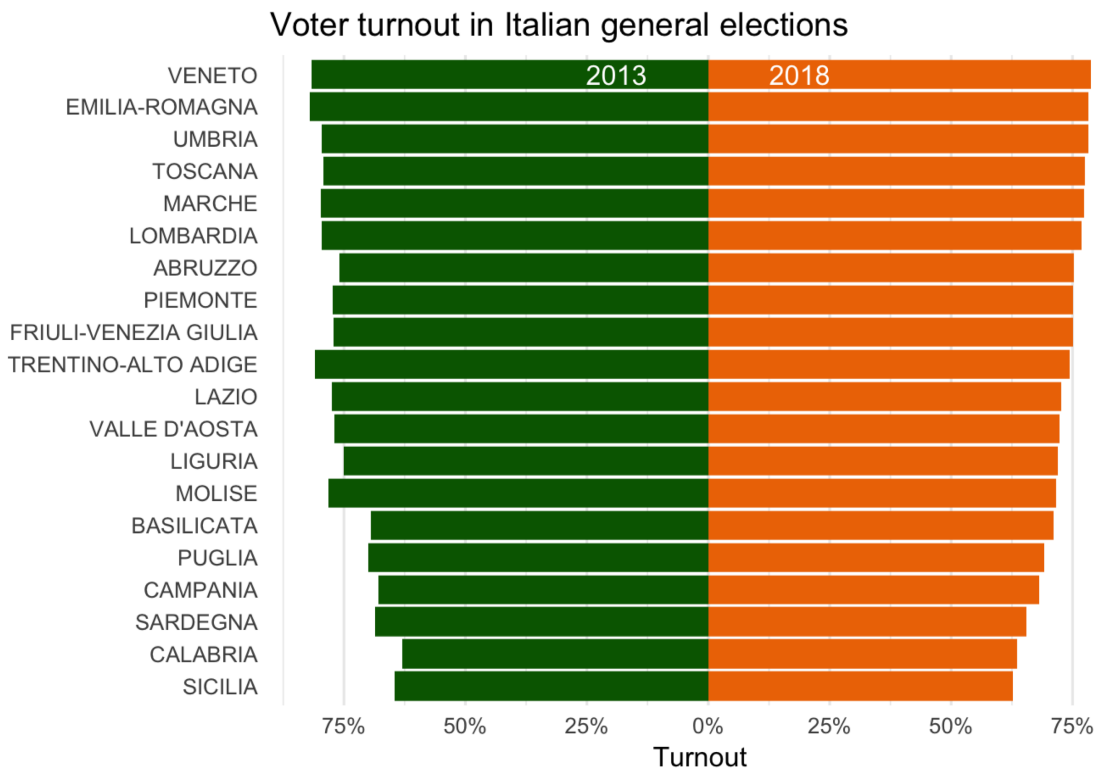
Slope of lines



Lines

- Easy perception of trends and overall shape of data
- Best suited for time series
- Variation encoded as slope
  - Clear direction
  - Approximate magnitude

Paired diverging bars

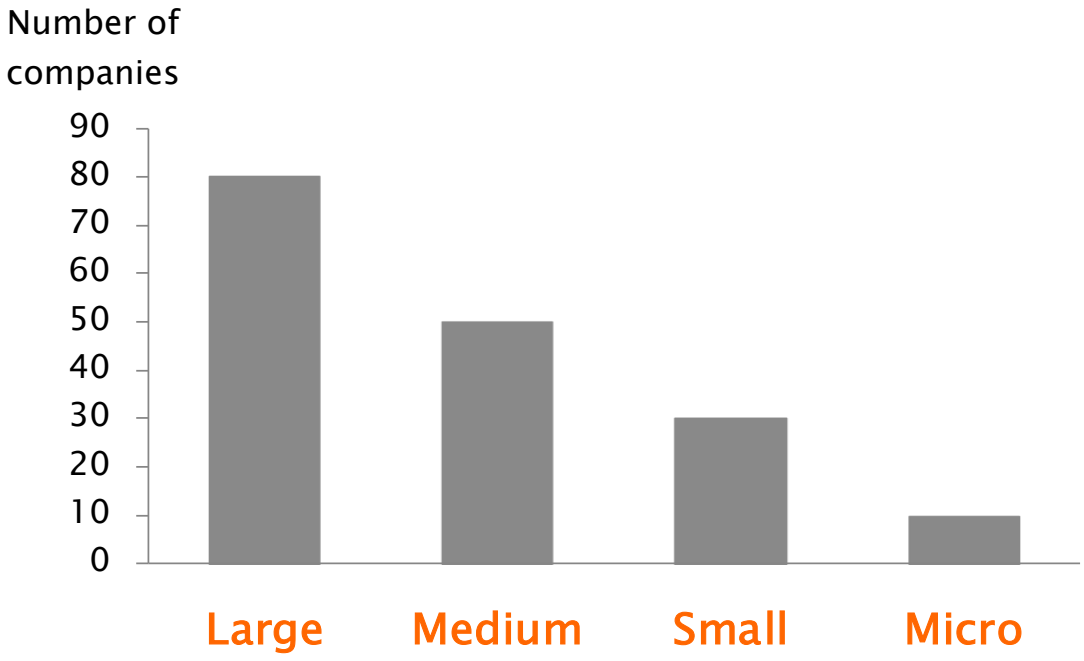


Categorical encoding attributes

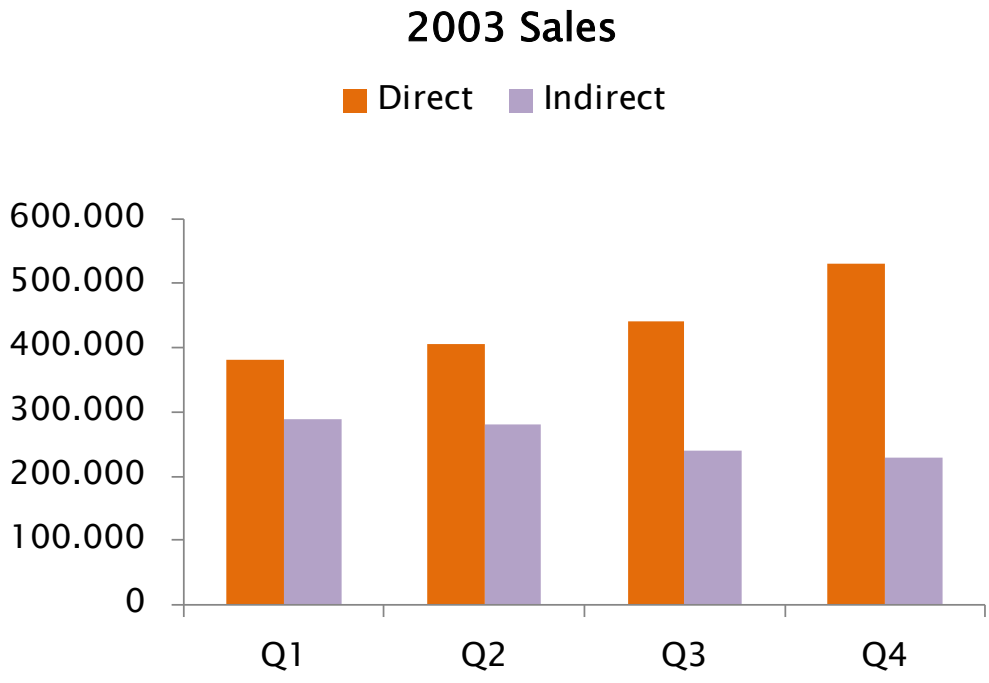
- Encoding of categorical levels
  - Position (along an axis)
  - Size
  - Color
    - Intensity
    - Saturation
    - Hue
  - Shape
  - Fill pattern
  - Line style

Ordinal

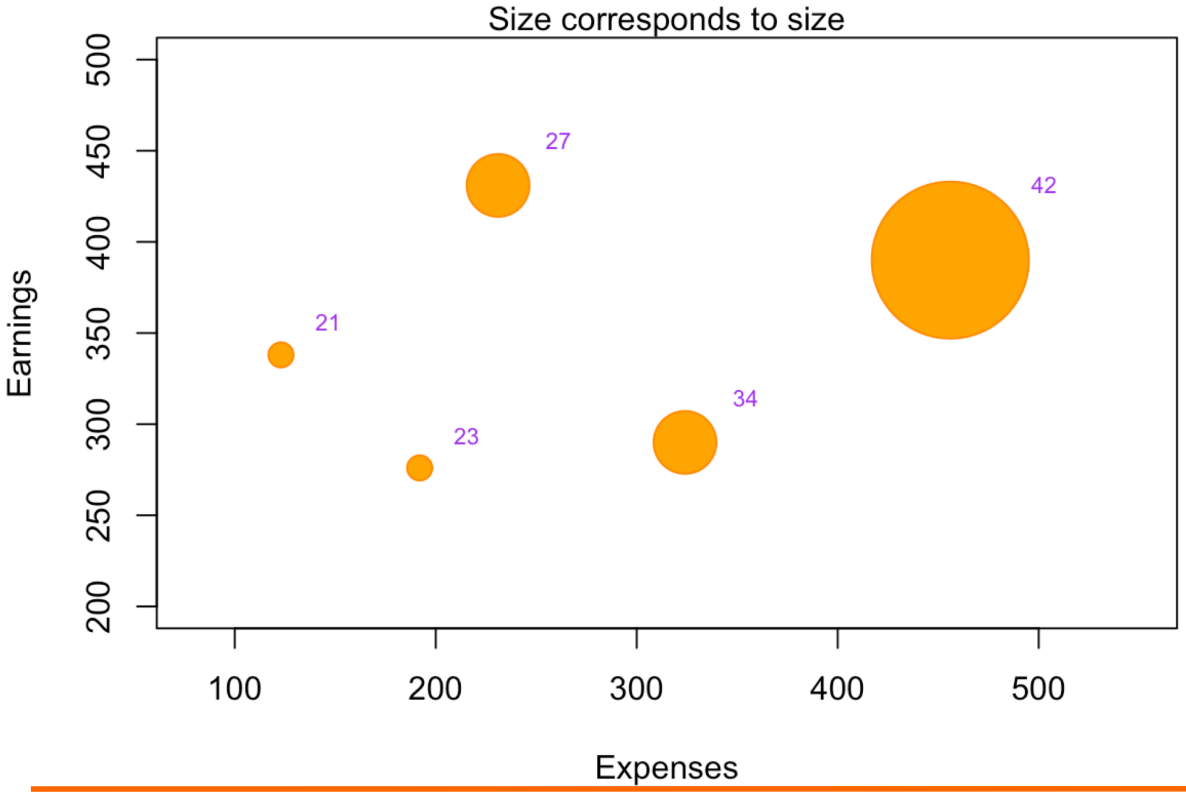
Position



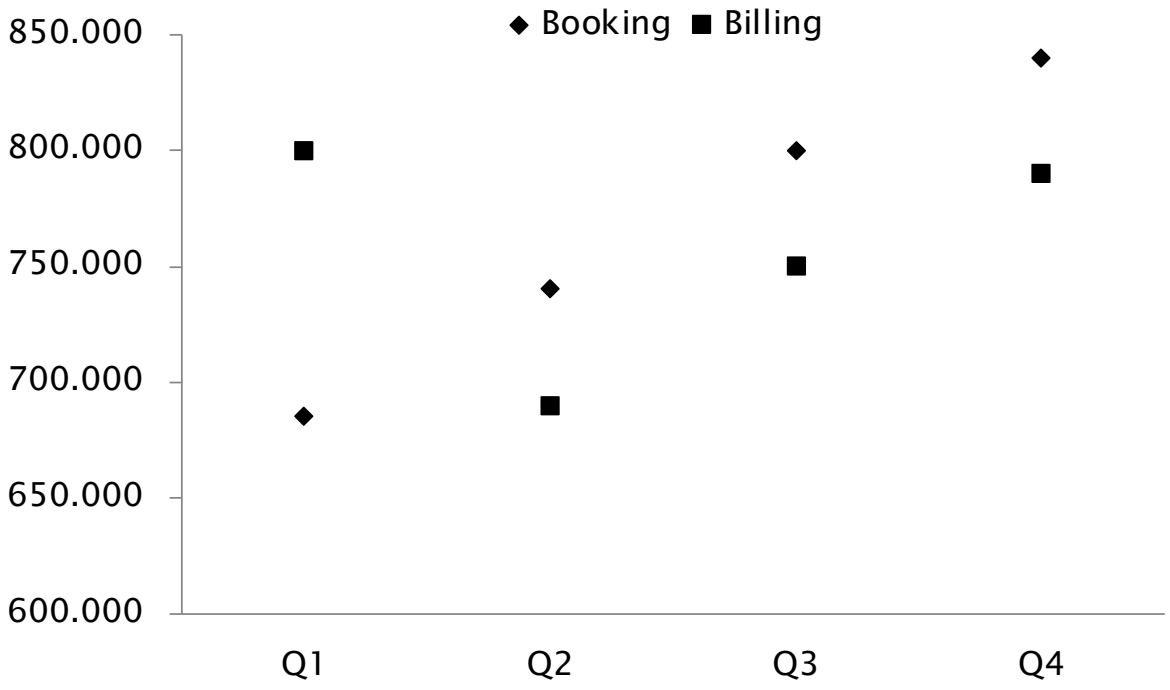
Position × Color (hue)



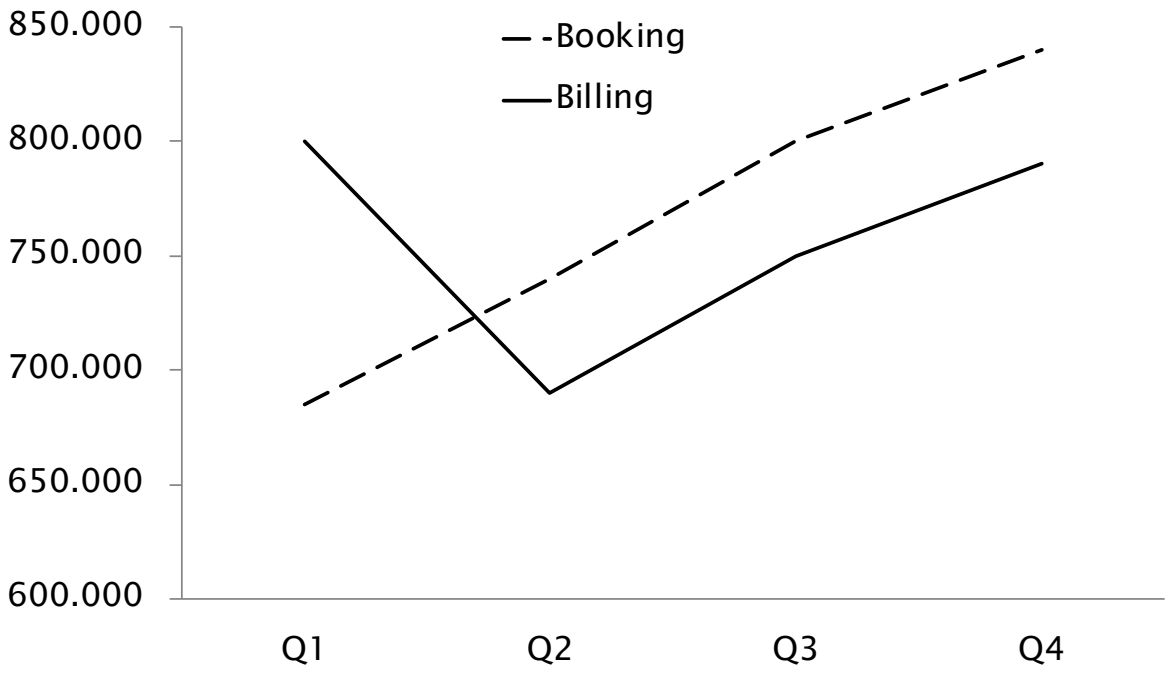
Size



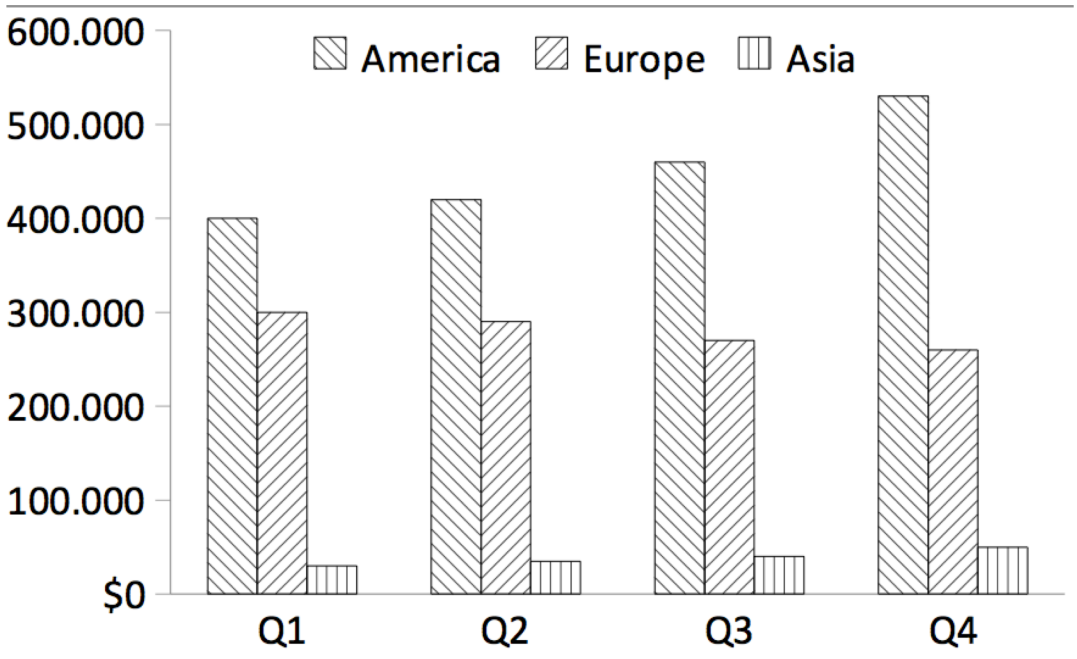
Point shape



Line style



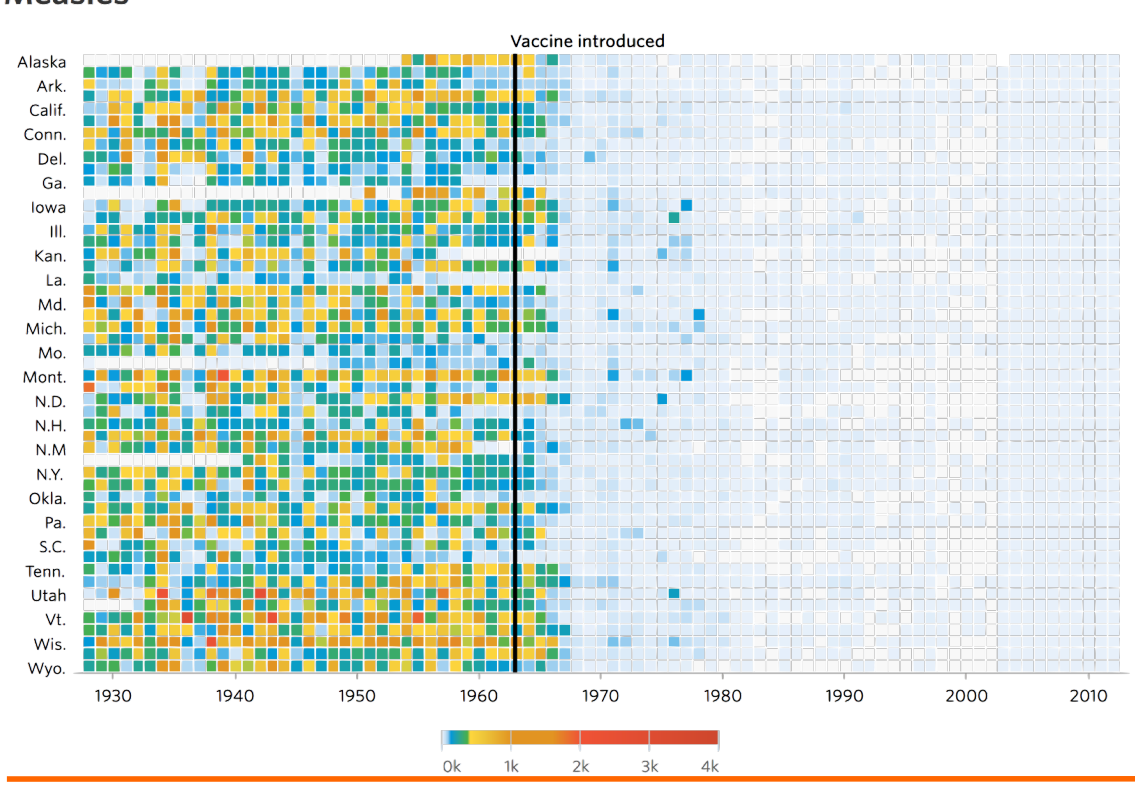
Fill Texture



Discretization / Quantization

- A data transformation that maps a quantitative measure into an ordinal one
  - Based on the definition of intervals
- Discretized measures can be encoded using an ordinal-friendly visual attribute
  - Size
  - Color
- Warning: details are lost in the process

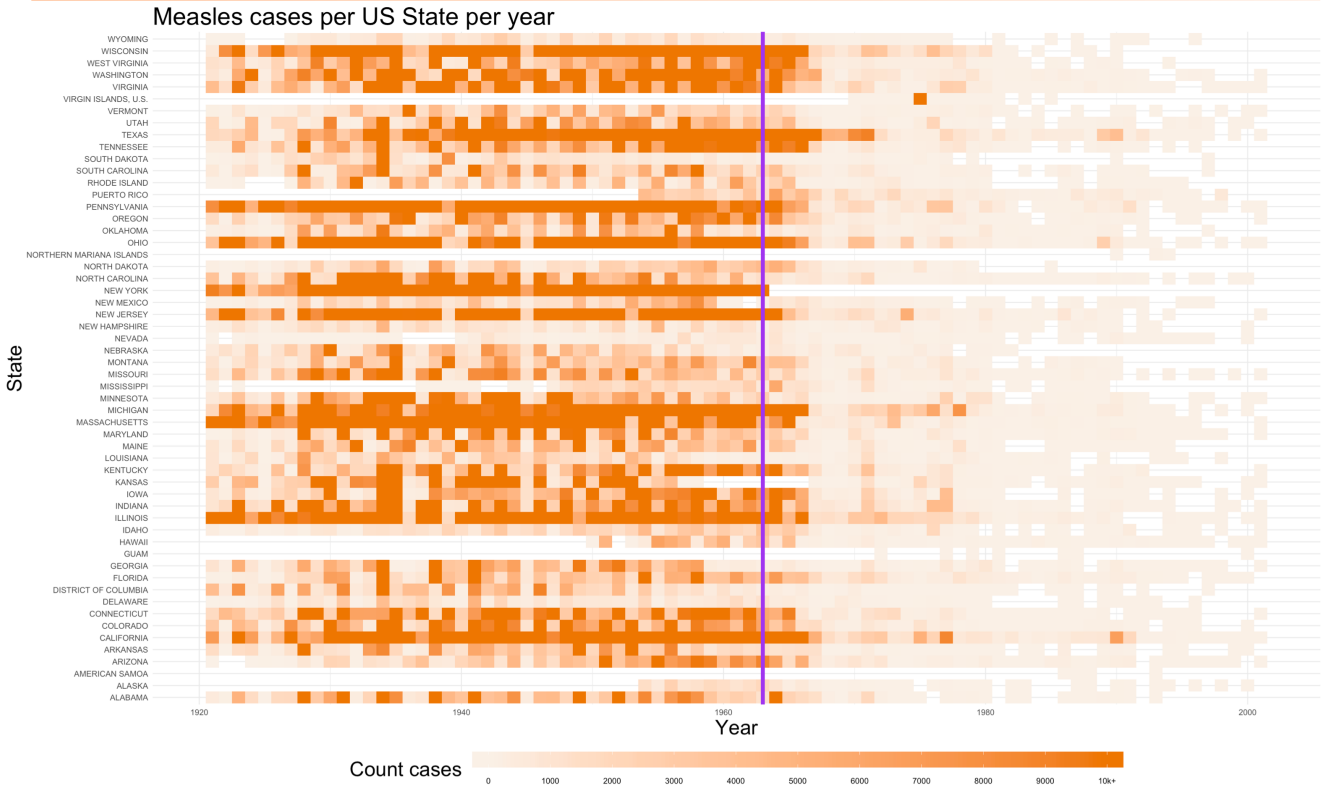
Heatmaps



Heatmaps

- Hues have no unique order semantics
  - Only intensity has one
- Rainbow palette have serious problems for color blinds
  - Roughly 5% of the population

Heatmaps



SUPPORT ELEMENTS

Support elements

- Axes
  - Ticks
- Graph area
  - Grids
- Labels
- Legends
- References
- Trellies

Axes

- Allow positioning of elements
  - Points
  - Extremes of bars and lines
- Labeled
  - What is the measure?
- Number of axis should be 2
  - 1 is fine for bars
    - continuity gestalt principle

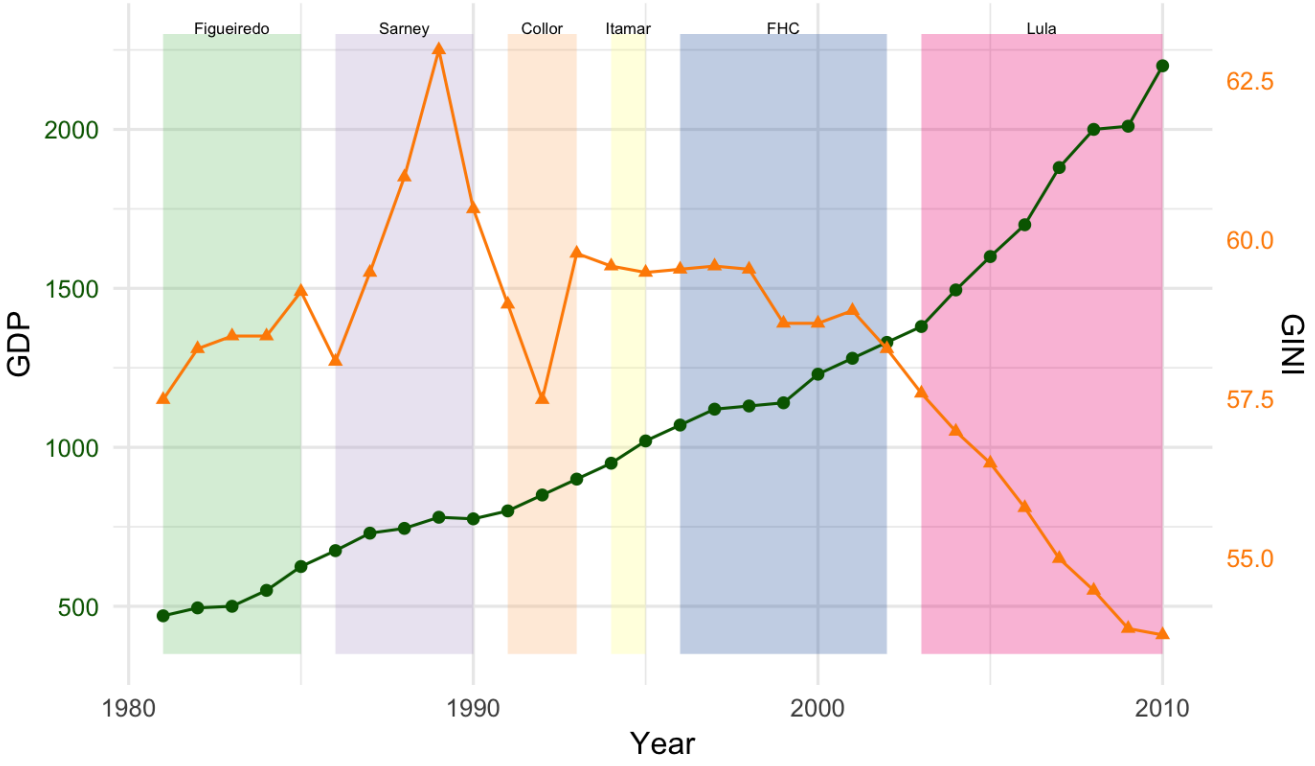
Tick marks

- Must not obscure data objects
- Outside the data region
- Avoid for categorical scales
- Balanced number
  - Too many clutter the graph
  - Too few make difficult to discern reference for data objects
  - Intervals must be equally spaced

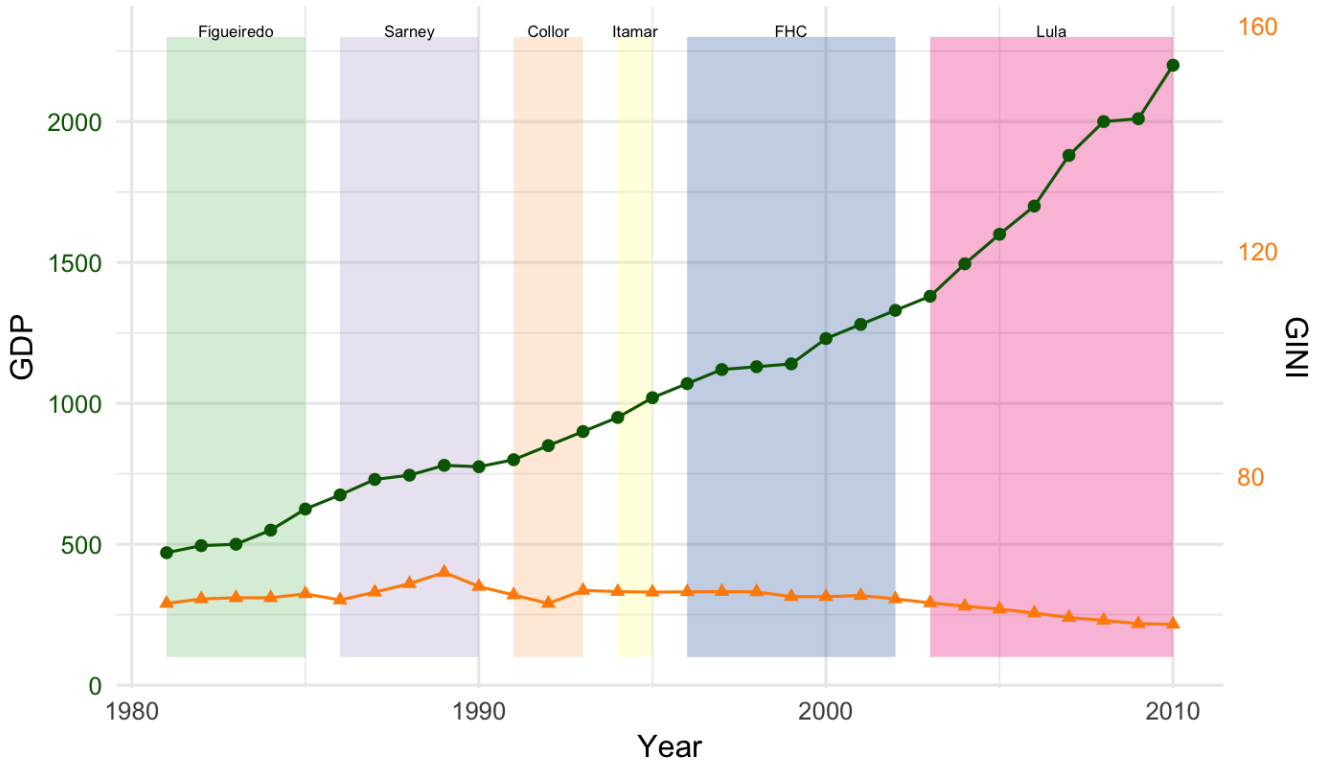
Multiple variables

- Correlation between 3+ variables
  - E.g. two measures in time series
- Multiple units of measure
  - Double quantitative (y) axis
  - Multiple graphs
  - One variable not encoded explicitly

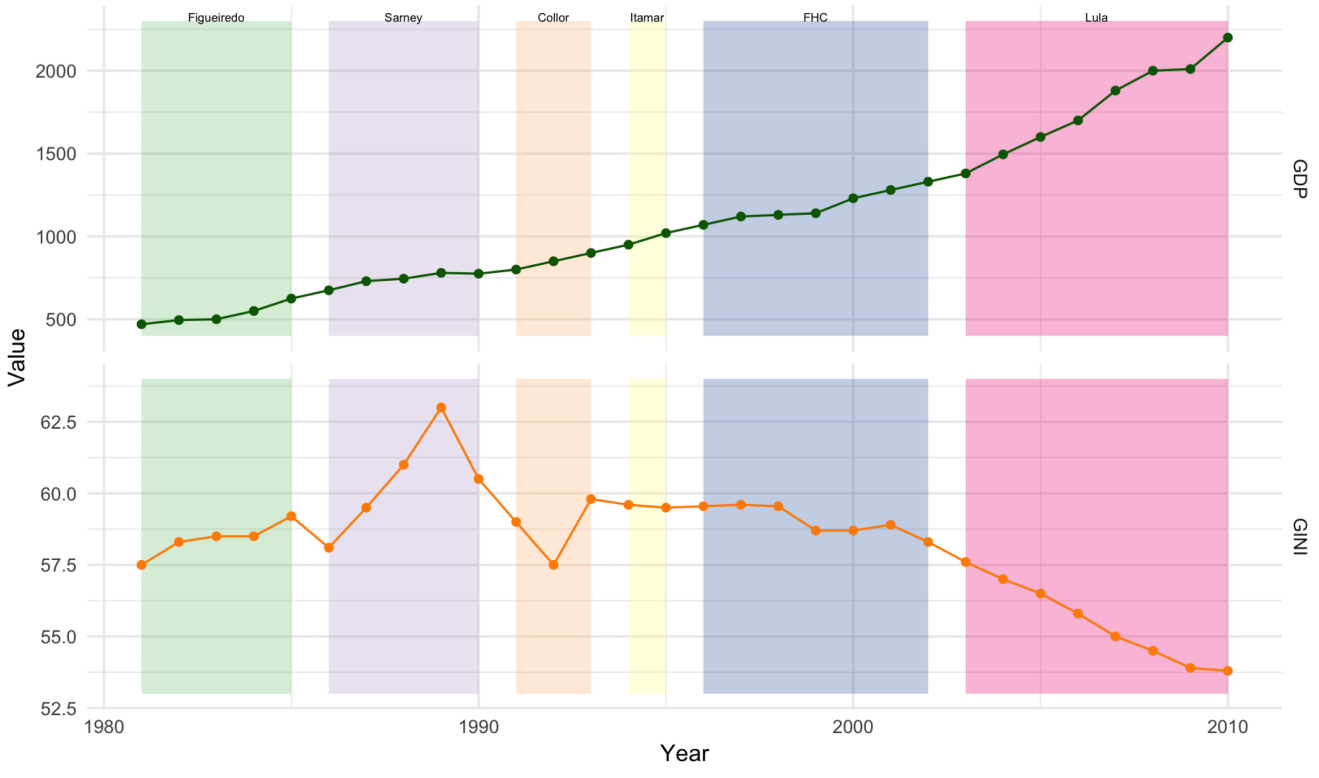
Double scale



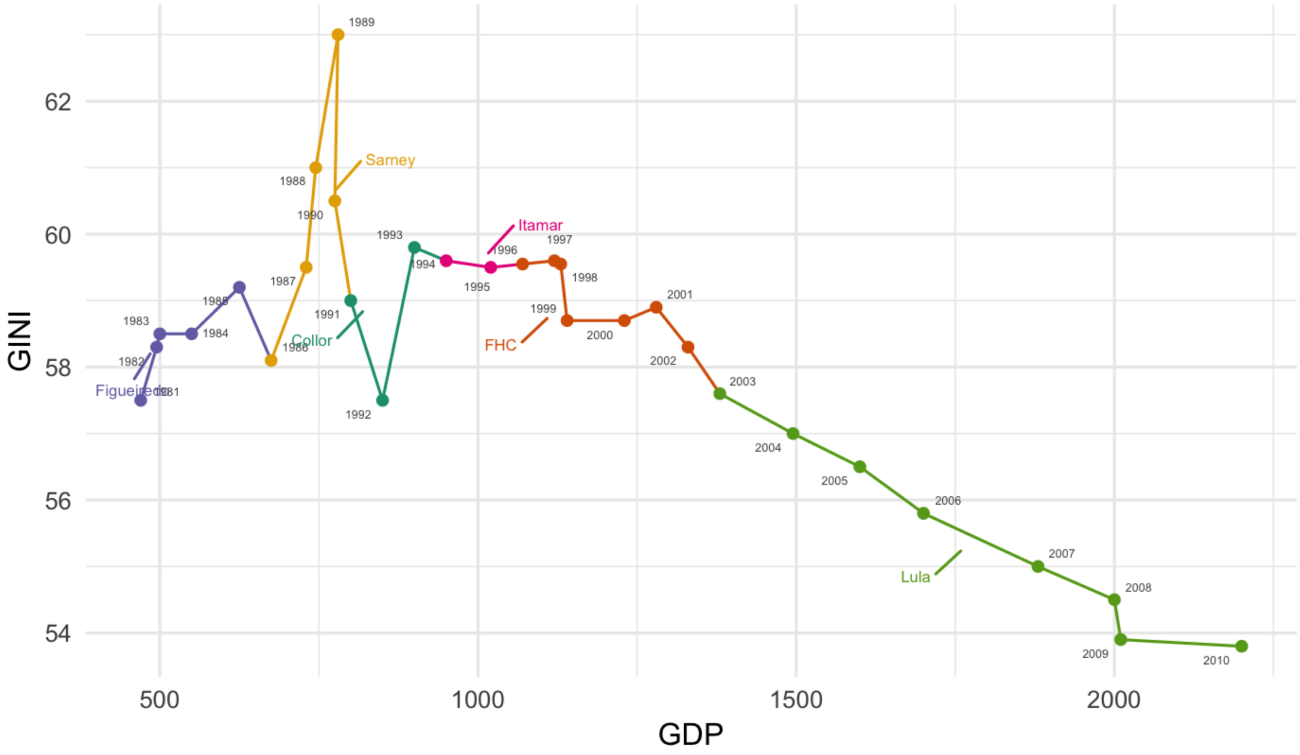
Double scale (alternative)



Multiple graphs



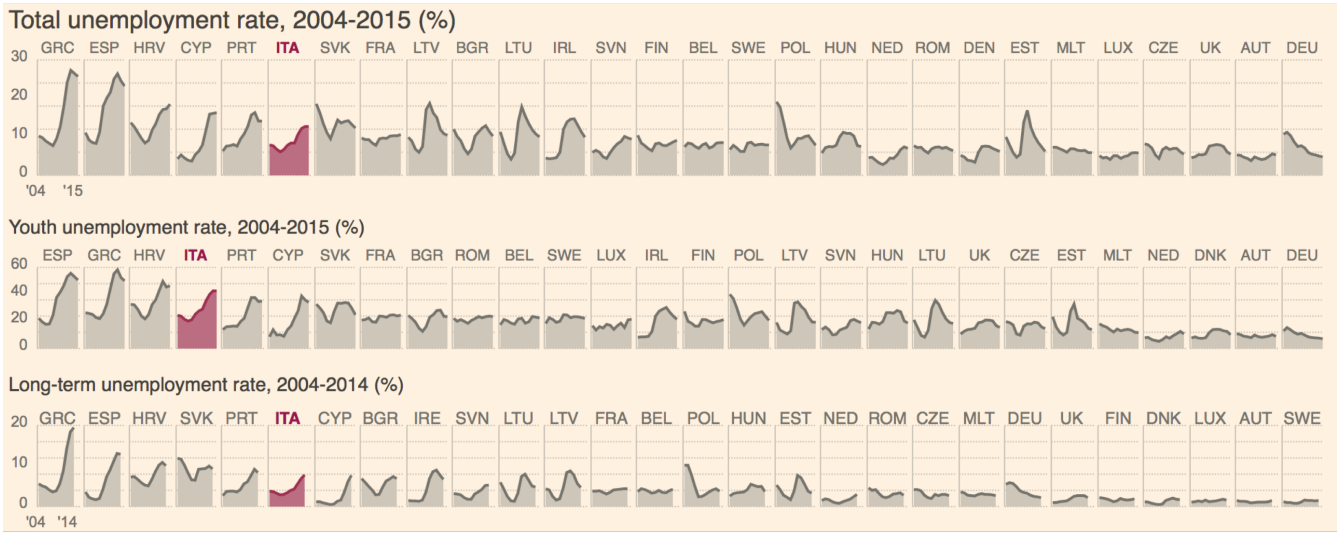
Path



Small multiples

- A.k.a.
  - Trellis
  - Lattice
  - Grid
- Set of aligned graphs sharing (at least one) scale and axis
  - Enable ease of comparison among different measures

Small multiples



FT EU unemployment tracker
http://blogs.ft.com/ftdata/2015/04/17/eu-unemployment-tracker/

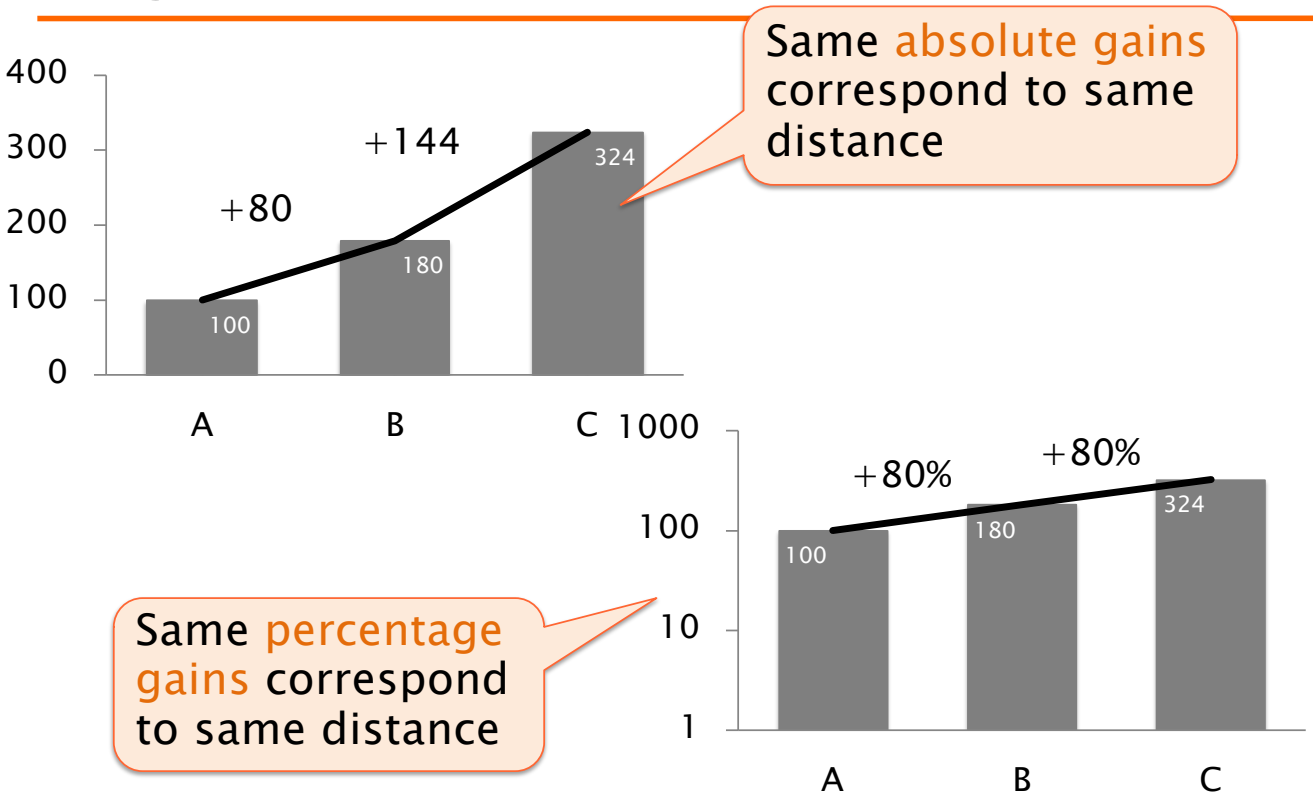
Trellis

- Sequence
  - Intrinsic order
  - Order of relevance
  - Order by some quantitative attribute
- Rules and grids
  - Use when spacing is not enough
  - Can direct the reader to scan graphs horizontally or vertically

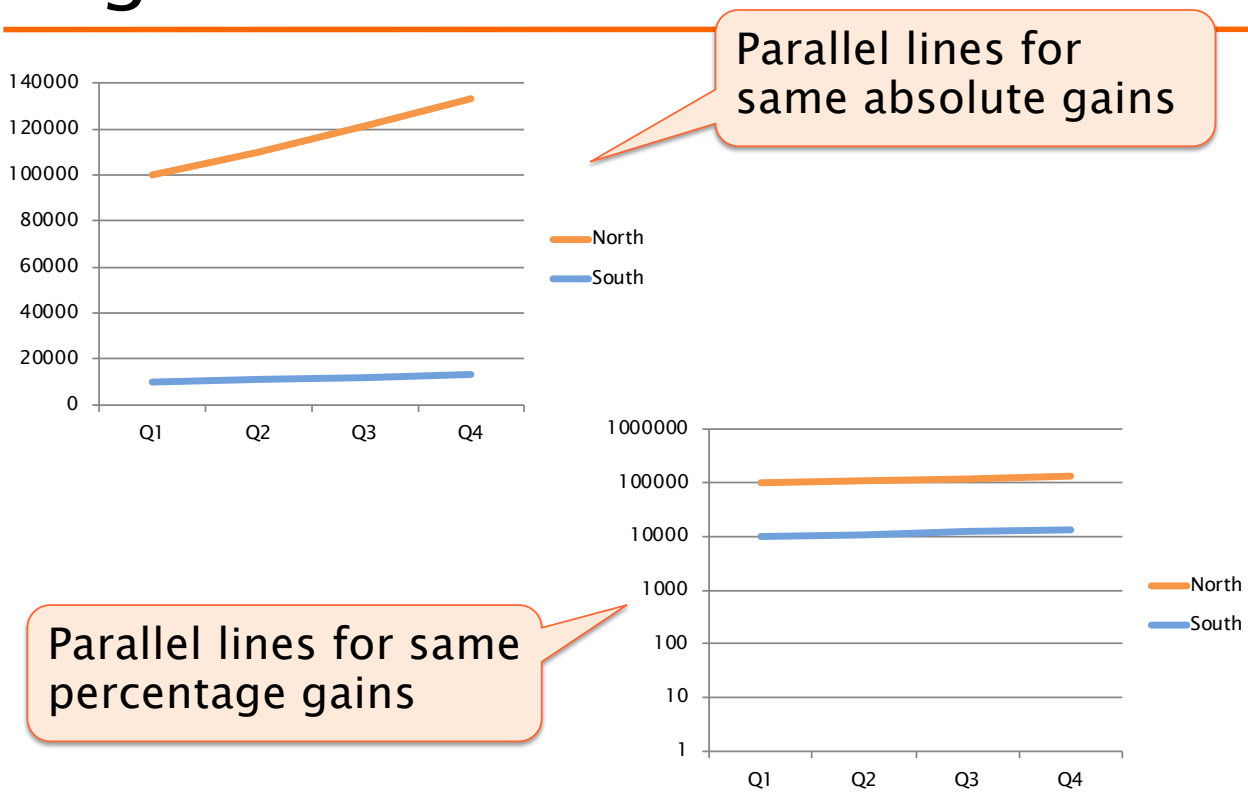
Log scale

- Reduce visual difference between quantitative data sets with significantly wide ranges
- Differences are proportional to percentages

Log scale



Log scale



Graph area

- Aspect ratio should not distort perception
  - Typically wider than taller
  - Scatter plots may be squared
- Grid lines must be thin and light
  - Useful to look-up values
  - Enhance comparison of values
  - Enhance perception of localized patterns

Labels

- Important elements (e.g. titles) should be prominent
  - Top
  - Larger

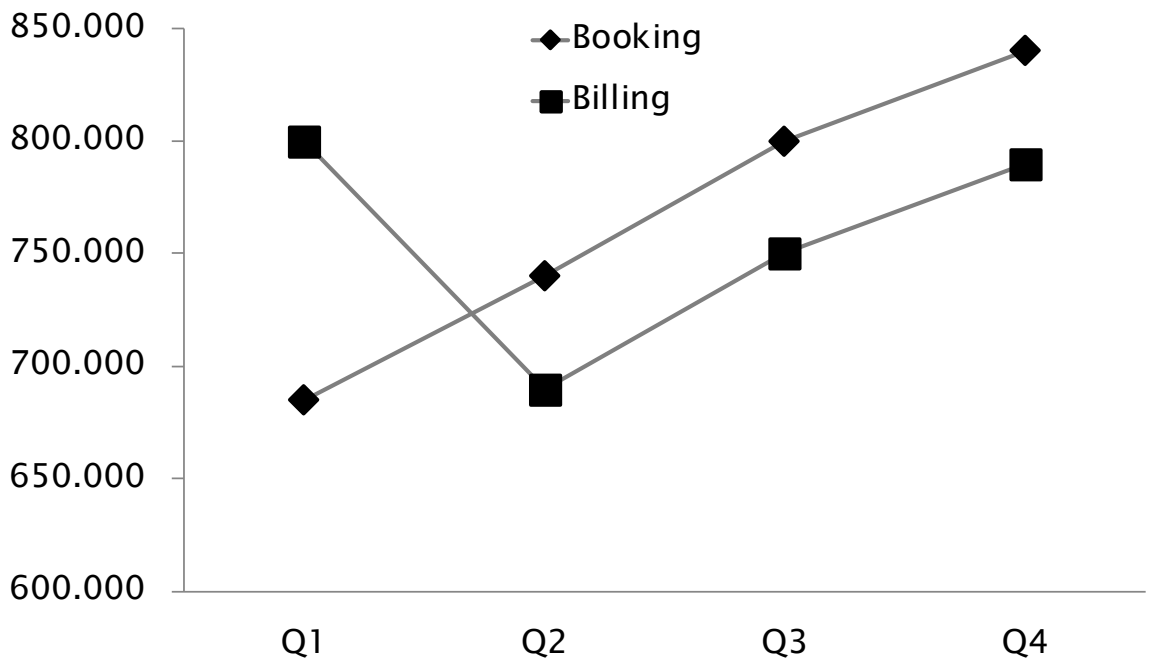
Legends

- Used for categorical attributes not associated to any axis
- As close as possible to the objects
- Less prominent than data objects
- Borders are used only when necessary to separate from other elements

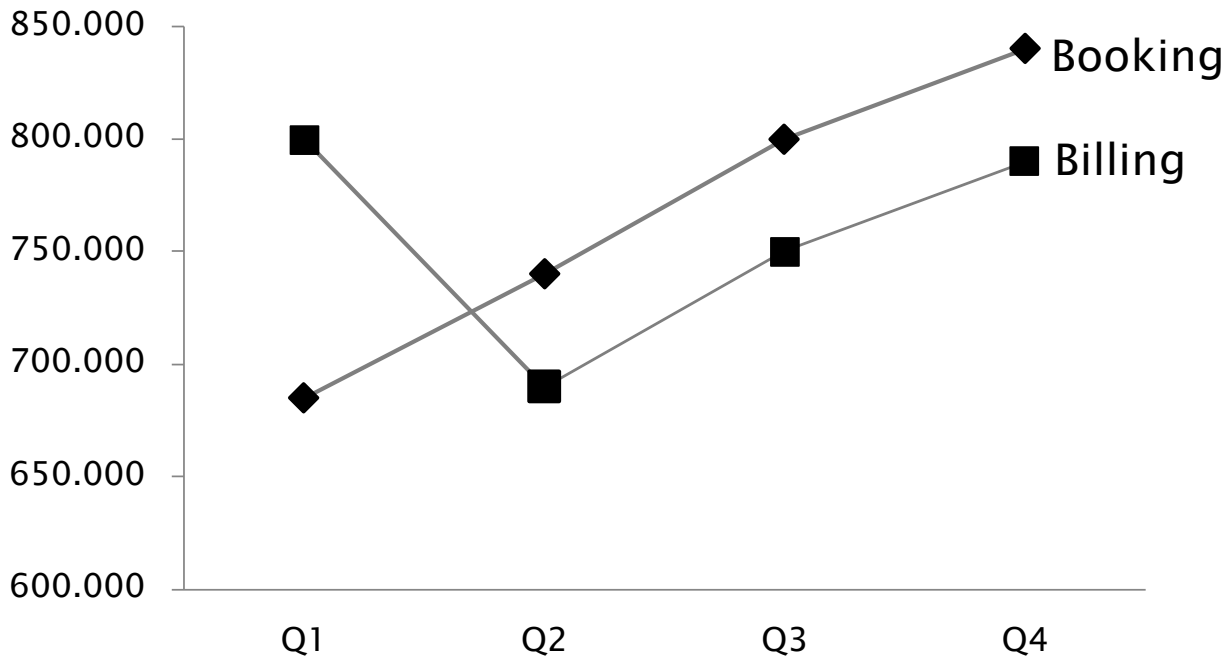
Legends

- Text should be as close as possible to the object it complements
  - Prefer direct labeling to separate legends
- Number of categorical subdivisions
  - Perceptual limit is between 5 and 8
  - Limit is independent of the visual attribute used to encode it
  - Joint use of attributes ease discrimination

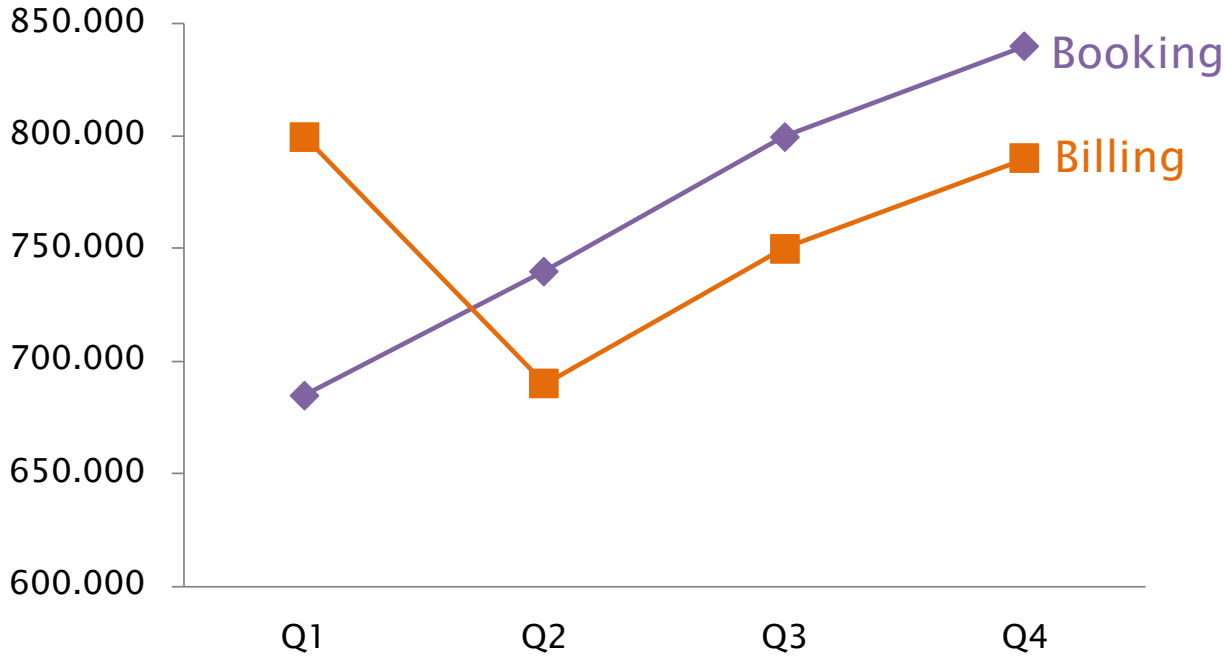
Legend



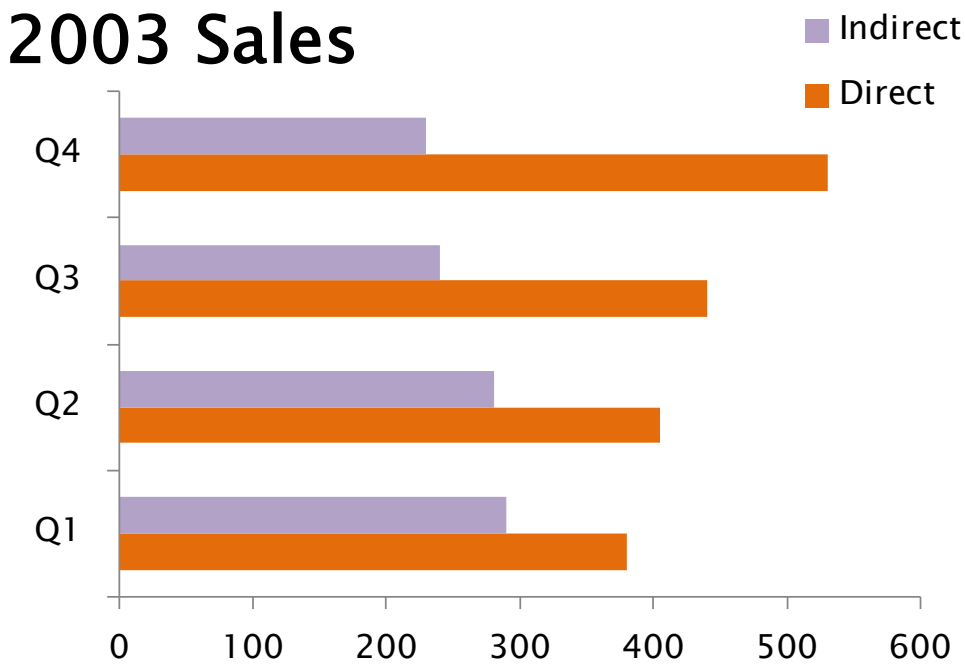
Direct labeling



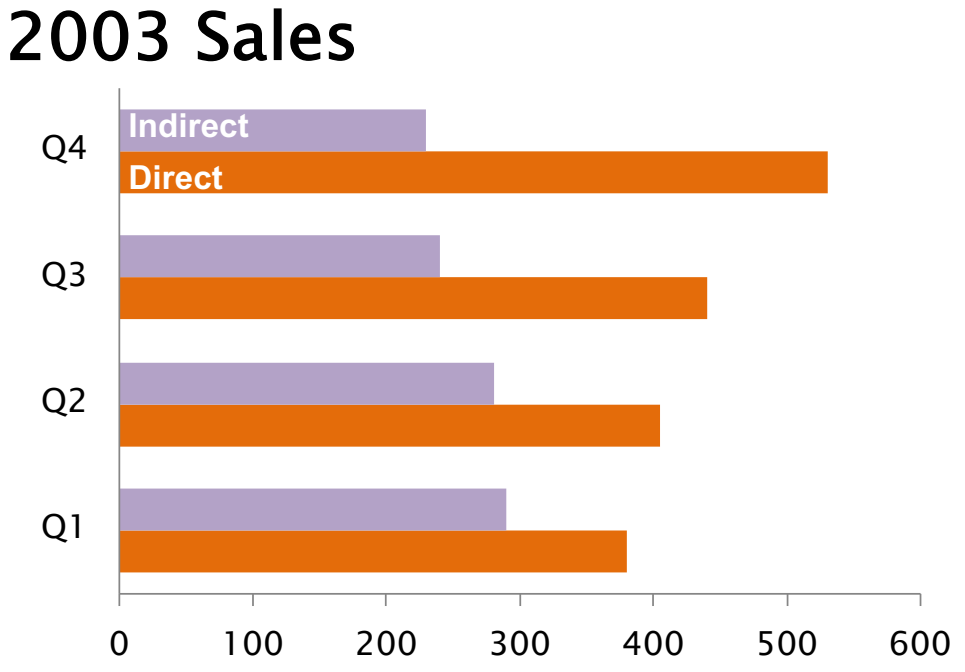
Direct labeling and color



Legend



Direct labeling



Reference lines and regions

- Reference lines support an easy comparison to a given value
  - Mean
  - Threshold
- Reference regions allow comparison with several values
  - Use background color

DASHBOARD

Dashboard

Visualization of the most relevant information

needed to achieve one or more goals

which fits entirely on a single screen so it can be monitored at a glance

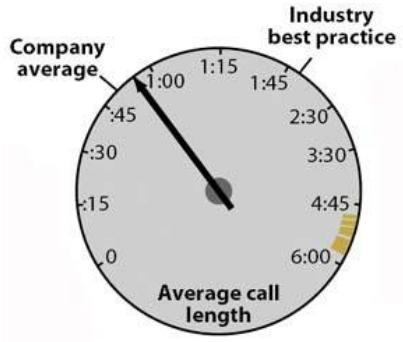
Dashboard

- Dashboards display mechanisms are
  - small
  - concise
  - clear
  - intuitive
- Dashboards are customized
  - To suit the goals of person, group, function

Provide context for data

PUC

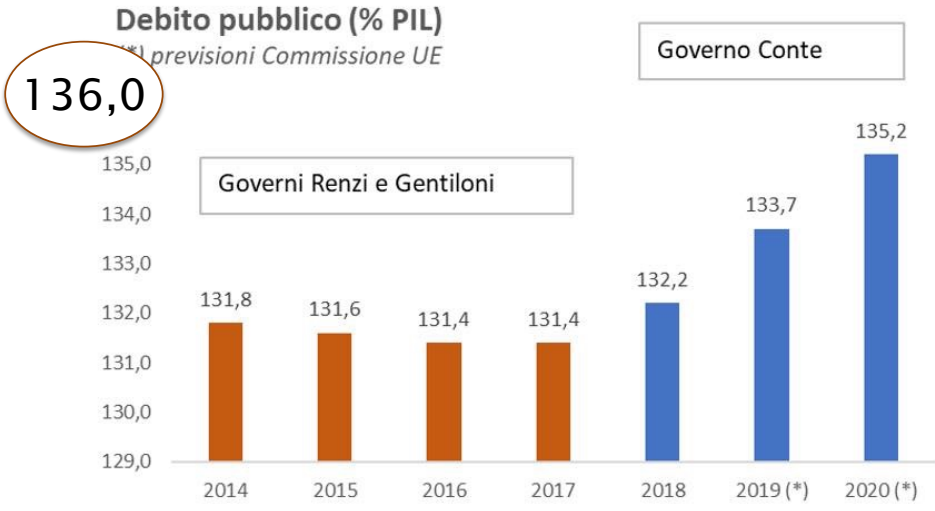
- References allow judging the data



Use appropriate detail

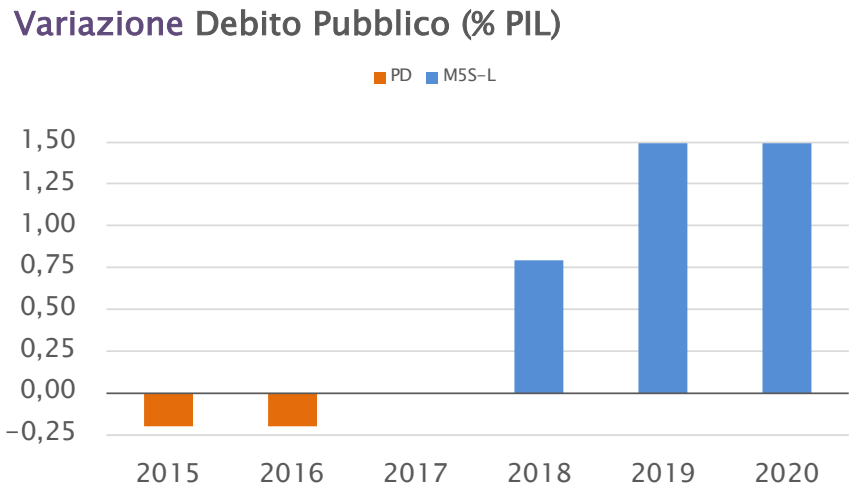
PUC

- Typical counterexamples
  - Dates with seconds detail
  - Decimals



Use the right measures

- If you are interested in e.g. the difference, ratio, variation show such derived measure



Use appropriate visualization

- Typical errors:
  - Any chart when a table would be better
  - Pie-charts not representing part-whole
  - Bubble charts

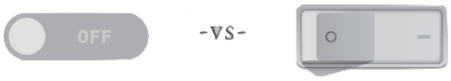
Visualization instruments

- Tables
  - Textual information
- Graphs
  - Visual information

Avoid decorations

- Skeumorphic design
- Backgrounds motives
- Color gradients
- Variations not encoding any measure
  - Typically color

Avoid decorations

- Skeumorphic design 

- Backgrounds motives
- Color gradients
- Variations not encoding any measure
  - Typically color

Avoid decorations

- Skeumorphic design
- Backgrounds motives
- Color gradients
- Variations not encoding any measure
  - Typically color

A

B

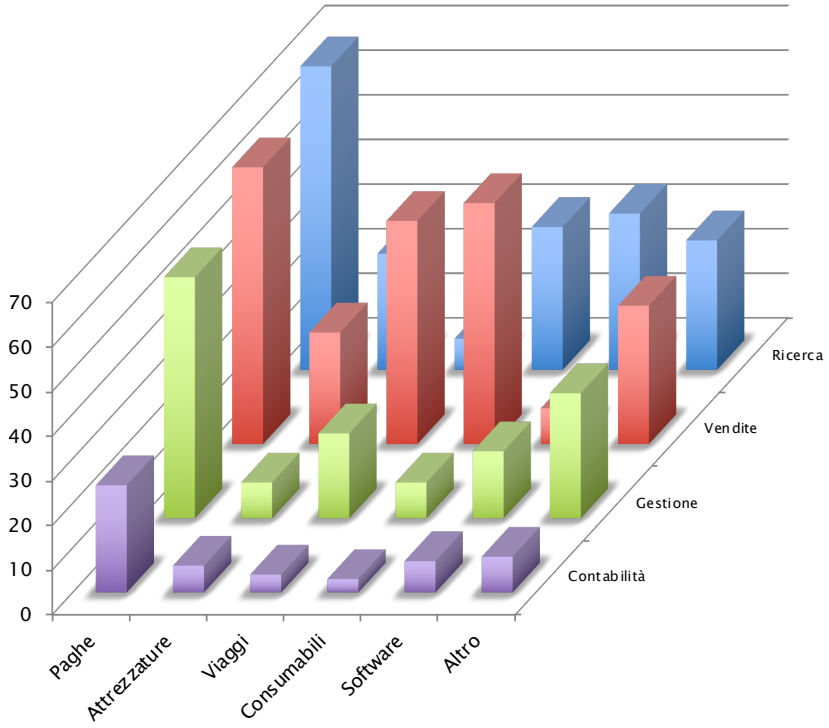
Avoid decorations

- Skeumorphic design
- Backgrounds motives
- Color gradients
- Variations not encoding any measure
  - Typically color

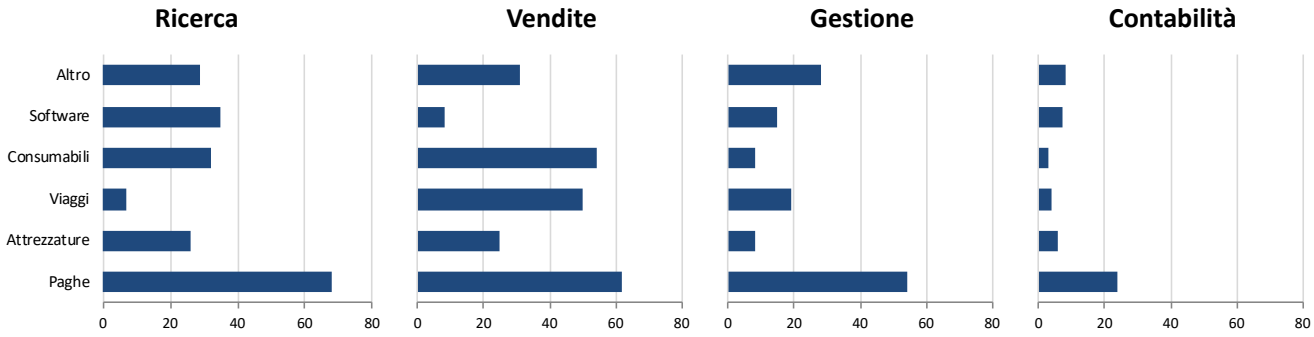
3D diagrams

- Encoding
  - Axonometry typically hides some data and makes comparison hard
- Not encoding
  - Perspective deform dimensions
  - Depth or height distract and make comparison more difficult

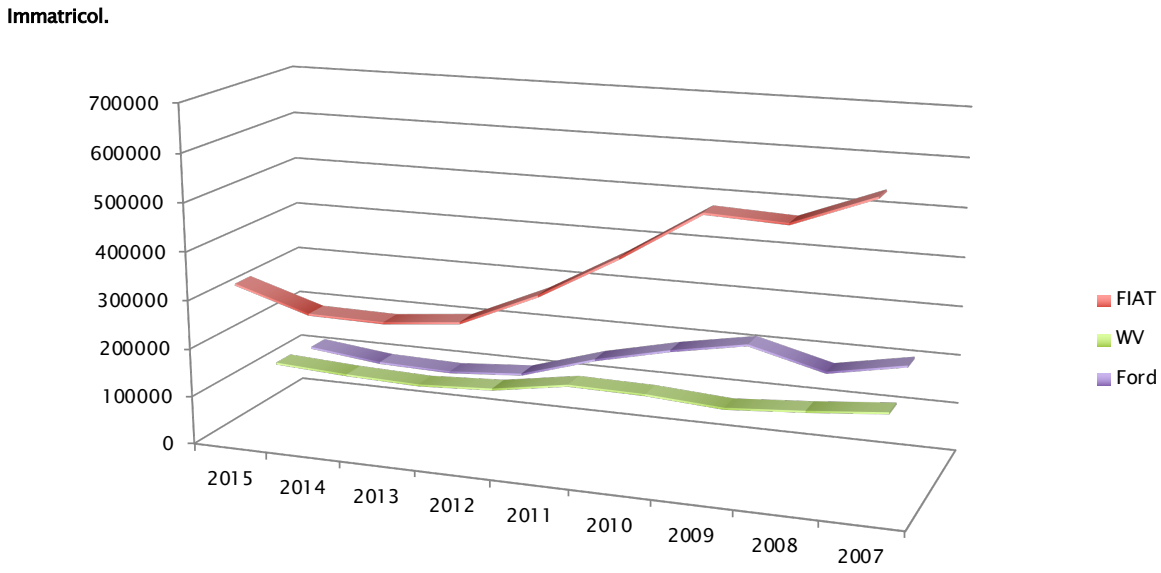
Encoding 3D



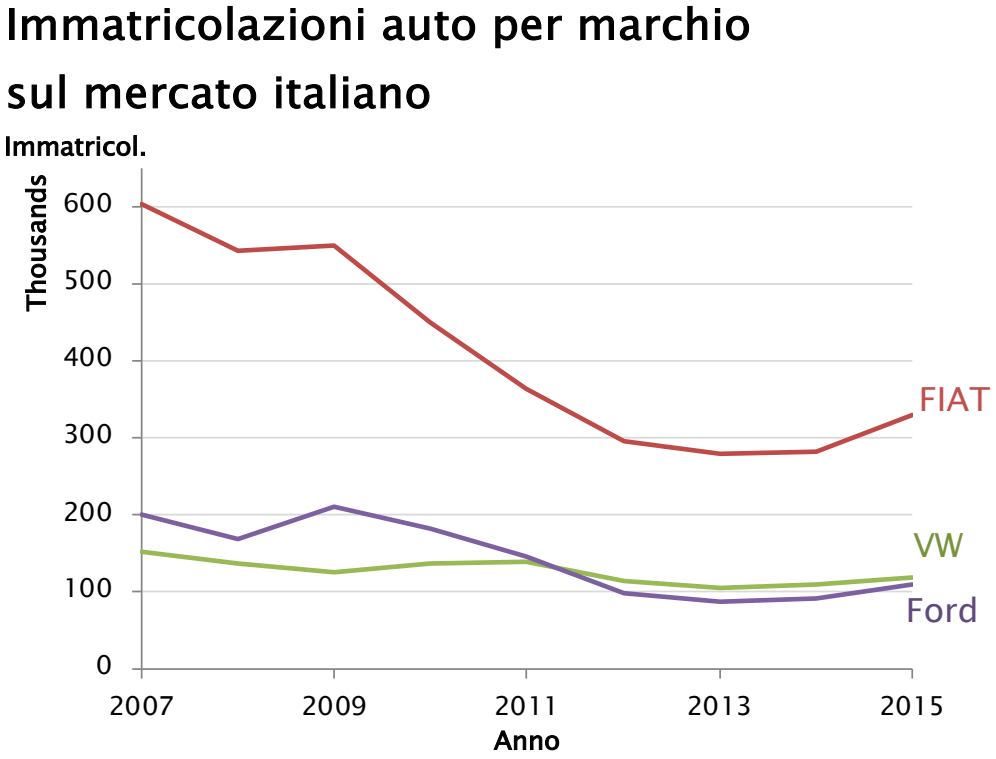
Encoding 3D → 2D



Decorative 3D



Decorative 3D → 2D



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