

Small Handbook of Information Design: 16 Principles for Better Data Visualizations

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Some of these principles are based in part on Edward Tufte's books and workshops.

To print more booklets: bit.ly/1bhDU4y
Thanks (and apologies) to my students for showing details from their various projects.

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Every graphic is an ad hoc construction, therefore these rules can be broken depending on the context. However you should try to do the graphic by following these rules first and break them later if necessary.

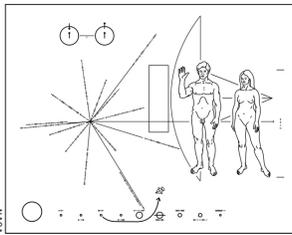
San Francisco State University
College of Liberal and Creative Arts
School of Design

DAI 523 Information Design 1: Data Visualization
February 2020

Notes:

Notes:

16 Psychology of perception



Be aware of the following terms related to cognitive psychology and psychology of perception: working memory, co-construction of meaning, background knowledge, conventions of representation, cultural (visual and verbal) conventions, context, genre, the annotation layer, closure.

For more information about the terms above, read my two papers:

The Four-Second Window

<http://bit.ly/Ve2mph>

and

The Double Constraints of Convention and Cognition in Successful Graphic Design

<http://bit.ly/12zLinL>

Visit URLs to download the PDFs of the articles.

01 Use pencil and paper



In the early and later phases of a project, simply use pencil and paper as your design tools, use graph paper if needed, to sketch ideas, try out designs, and work out your proposal. Work on your ideas and your concepts by sketching your visualizations. Solve problems through sketching by hand, not by staring at a computer screen.

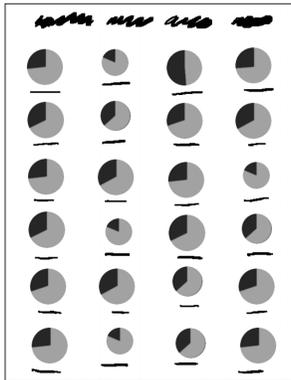


02 Content is first

year	bracket	fed
1980	1	0.02306

year	bracket	fed	prop	tax	prop	tax	prop	tax	prop	tax
1980	1	0.02306	0.0041	0.0535	0.0847	0.0463	0.0774	0.0209		
1980	2	0.07927	0.0179	0.0758	0.0847	0.0140	0.0384	0.2624		
1980	3	0.1445	0.0261	0.0813	0.0847	0.0066	0.0103	0.0448		
1980	4	0.1588	0.0287	0.0824	0.0847	0.0171	0.0388	0.2537		
1980	5	0.1597	0.0284	0.0791	0.0847	0.0197	0.0445	0.1445		
1980	6	0.1613	0.0288	0.06	0.0791	0.0179	0.0448	0.1623		
1980	7	0.16944	0.0318	0.0507	0.0149	0.0444	0.1787			
1980	12	0.184	0.0385	0.0618	0.0456	0.0171	0.061	0.4925		
1980	15	0.26113	0.0583	0.0388	0.0517	0.0629	0.0999	0.4464		
1981	1	0.02969	0.0049	0.0501	0.0847	0.0171	0.0176	0.0261		
1981	2	0.0811	0.0134	0.0785	0.0841	0.0055	0.0178	0.2875		
1981	3	0.0257	0.0029	0.0616	0.076	0.0041	0.0171	0.1518		
1981	4	0.14412	0.0232	0.0805	0.0332	0.0388	0.029	0.1885		
1981	5	0.16341	0.0244	0.0824	0.0547	0.0144	0.0337	0.164		
1981	6	0.16579	0.0278	0.0707	0.0385	0.0104	0.0379	0.192		
1981	7	0.16417	0.0286	0.0689	0.0547	0.0105	0.0418	0.1878		
1981	11	0.18037	0.0301	0.0826	0.0405	0.0189	0.0632	0.4264		
1981	12	0.287	0.034	0.034	0.0347	0.0053	0.0052	0.4655		

Content is first, form is second. Select interesting content. Content-less stuff produces form-less, uninformative visualizations. This means that you need one or more data sets that are rich with data. Many columns and many rows (lots of data points) are better than just two data points. For example, two percentages: 25 and 75 are in themselves not very interesting and it would be hard to pull off an interesting visualization based on just those two numbers.



15 Do not screen type



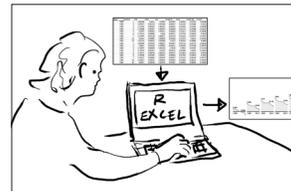
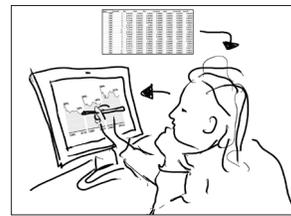
Every font is a wonderful and beautiful universe unto itself. Do we really need to tinker with what is already a very sophisticated sign system? Do not reverse, screen (make tints), border, condense or expand type. Do not italicize type by pressing the "oblique" button. Use a font that already has a wide range of weights. Traditional old-style italic fonts are best to save space if needed, as they are naturally condensed and were designed for this purpose. Do not let your text lines run longer than two-and-a-half times the alphabet – about 60 characters. Break up the big text boxes into two or more columns whenever necessary so that your measure (box width) is "measured" and correct. Do not justify text if possible, use flush left / ragged right (FL/RR).

14 You can use small type



You can use small type in a big poster. Use as many sizes as needed. A range from 16-18pt to 24pt is the best size range for most text on a poster, excluding the main title and possibly the subtitle, with even smaller sizes for captions and labels. For short texts, use 24pt. Sometimes 30pt for larger text can be used. In general, imagine that you're standing 20 to 30 inches from the poster. At this distance, you should be able to read most text elements in the layout.

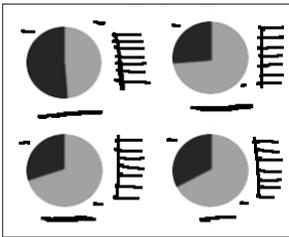
03 Do not draw graphs by hand



Do not take a numerical table or spreadsheet and then render the shapes (the bars, the lines) by hand, even if you're using Illustrator. Rather, take the data set and process it through a data visualization program, such as R, Excel, or other. Then bring the file into Illustrator to clean up and fine-tune line weights, typography, color, etc.

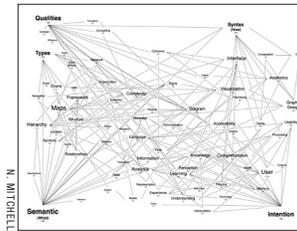
04 Do not enlarge numbers

55% BLA BLA BLA
27% BLA BLA BLA
30% BLA BLA BLA
35% BLA BLA BLA



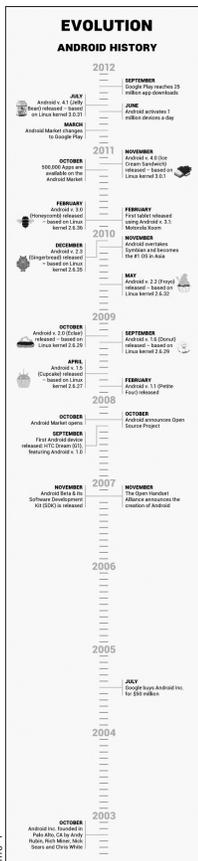
Do not turn data points into stand-alone enlarged numbers with a percentage sign next to them to make them look important. Filling up your visualization with such “visuals” is not any better, and might in fact be worse, than just having plain text, with no “visualizations” at all. An infographic is not a PowerPoint template. The best thing to do is to combine words and images together.

13 Avoid meaningless concept maps



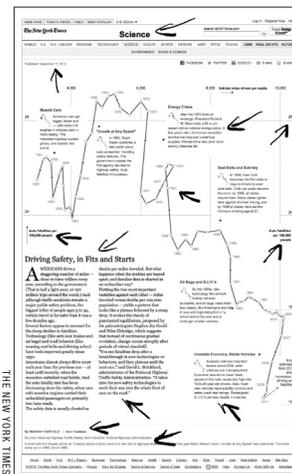
Avoid meaningless concept maps and network graphs. For a simple reason: they include on the page too many items and abstract concepts at once. Our working memory (short-term memory) allows us to hold in memory only a few items (4-7) for a very short time (2-4 seconds) before we have to move on. Concept maps look very cool but they are also very uninformative and little information is retained from them in our long-term memory. Generally, the thing one remembers from them is their vague visual form – the shape of the graph – rather than the more important subject matter.

12 Equally space time intervals in timelines



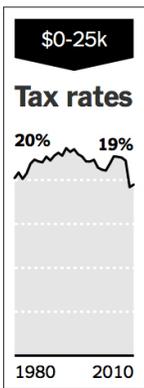
Keep the spacing equal (for equal periods of time) even if that results in big information gaps within certain periods of time. Gaps are as meaningful as periods of concentrated activity. When data is concentrated within a few years, use typography and other means to make everything readable while keeping the temporal spacing even and correct.

05 Use words, not just images

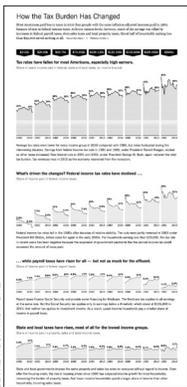


Use sentences: subject, verb, object. Close your clauses. Set up an introduction and follow through with visualizations. Use a title, a subtitle, an introduction, main text if needed, labels, captions, credits (for pictures) call-outs, footnotes, sources (for data sets), and a signature (colophon). This is called "the annotation layer". Plus, you can include numerical tables, if needed and appropriate, within the visualization.

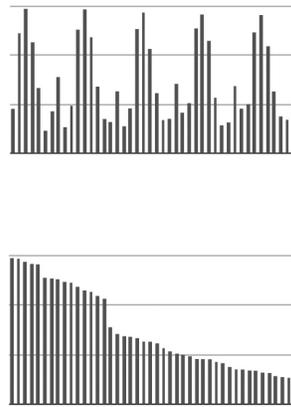
06 Use small multiples



Content is king. One single blown-up graphic is not so good, especially if it's just showing very few data points. Don't be stingy. For example, a pie chart showing 25 and 75 percent and filling up a whole poster is not so good. It's much better to have a high number of elements even if they're small, like in a geographic map. Twenty little pies are better than one giant pie. Ten little line graphs are better than a single giant line graph.

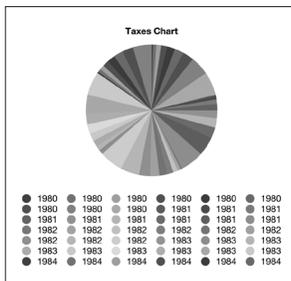


11 Sort by value, not category



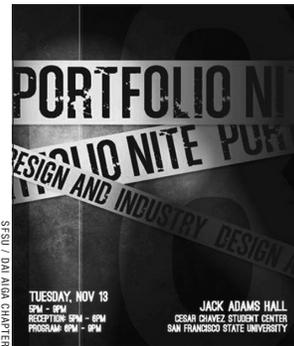
Sort by performance (value), not alphabetically. When part of the information is categorical but includes values for each category, do not sort the categories alphabetically. Instead, sort by the values for each of those categories. For example if the categories are products or states and each is a value, sort by the value, not by the alphabetical names of the states or the names of the products.

10 Do not use colors (to be memorized)



Do not use colors if the reader has to memorize them. Do not use colors if you have to have a legend for every single color in order to understand the graphic. If no legend is required, then little thinking is needed in order to perceive the graphic. Too many colors in the graph take a huge toll on the attention capacity of the reader. One cannot remember all those colors because we can only remember a small set of things at once: five-seven. Also, colors do not have an intrinsic order, therefore they should not be used to sort things, unless you use value as well: darker color for more, lighter color for less, both being from the same hue or two diverging hues maximum.

07 Do not bungle the meaning



Do not bungle the meaning of your visualization. Say what you mean and do not confuse the reader, starting with your opening title and subtitle. This applies to choice of words as well as pictures. For example, if the topic is "Tuition fee increases" do not say: "Fee hikes on Mount Everest"; say instead: "Fee increases reach new high". If the topic is "Black Friday (shopping)", do not say: "Products cheap as a black sheep"; say instead: "Black Friday keeps more green in your wallet". If the topic is "Christmas shopping", do not say: "Christmas shoppers pray to God for bigger discounts"; say instead: "Consumerism and religion mix in traditional Christmas holiday". Do not play loosely with irony and puns, and don't mix-up your metaphors.

