Overview. Visual displays are an integral part of most social science presentations and can make or break a paper. Good visuals help researchers uncover patterns and relationships they would otherwise miss. Ever more sophisticated statistical models cry out for clear, easy-to-understand visual representations of model findings. Yet social scientists seldom put as much care into designing visual displays as they devote to crafting effective prose. This course takes the design of graphics and tables seriously and explores a variety of visual techniques for investigating patterns in data, summarizing statistical results, and efficiently representing the robustness of such results to alternative modeling assumptions. Emphasis is placed on the principles of effective visualization, examples from the social sciences, novel visual displays, and the implementation of recommended techniques using the R statistical environment and the R packages tile, simcf, and ggplot2.

Prerequisites. No specific courses are required, but some graduate level quantitative methods coursework is prerequisite, as many of the applications we consider will as-
sume familiarity with the basics of research design and quantitative inference (linear regression & elementary maximum likelihood).

**Office Hours.** Chris Adolph: Thursdays, 3:00 – 4:15 PM and by appointment in Gowen 145. Kai Ping (Brian) Leung: Tuesdays, 3:00 – 4:15 PM and by appointment in Gowen 30.

**Course Website.** Consult http://faculty.washington.edu/cadolph/vis for problem sets, notes, and announcements.

**Notice Required by State Law.** Washington state law requires that UW develop a policy for accommodation of student absences or significant hardship due to reasons of faith or conscience, or for organized religious activities. The UW’s policy, including more information about how to request an accommodation, is available at Religious Accommodations Policy (https://registrar.washington.edu/staffandfaculty/religious-accommodations-policy). Accommodations must be requested within the first two weeks of this course using the Religious Accommodations Request form (https://registrar.washington.edu/students/religious-accommodations-request).

**Other relevant university policies.** See this website: https://registrar.washington.edu/staffandfaculty/syllabi-guidelines

**Course Requirements**

**Homework (30%)** I will assign three homeworks covering topics to include exploring datasets, visualizing the results of statistical inference, and designing and programming new visualizations. For some assignments, it will be possible to use a variety of graphics packages to complete the assignment, but for most problems, R will be required or strongly recommended. Help will be available for R and any other package specifically recommended for the assignment, but not for other packages.

**Breakout Groups (30%)** Starting next week, students will self-select into a small discussion group investigating the application of visual displays to a specific scientific problem or area. This problem might consist of a difficult kind of model or dataset to visualize. Alternatively, it might be a problematic or promising visual display method used frequently in the student’s field which the student hopes to replace, improve, or perfect. In past years, students investigated interactive graphics, animations, and visualizations
for text data, network data, hierarchical and multilevel data, spatial data, and time series, respectively, among other topics. Students may choose among these topics or propose their own. I reserve the right to decide which groups are large enough to be viable and to combine groups if needed.

Before our joint meeting, each member of the breakout group will write and circulate to the group and to me a 2–5 page memo, complete with (original or borrowed) graphics, illustrating a relevant data visualization problem they wish to tackle and briefly sketching possible strategies for solving it. This memo need not solve the data visualization problem and may not necessarily even present an actual data analysis; the goal is to start a conversation about how we might approach a student-selected visualization challenge. Each group will meet at least once for discussion of their problem area and memos; this meeting will occur no earlier than the start of Week 3 (Tuesday, 21 January) and no later than the end of Week 6 (Friday, 14 February).

By 9 am Monday, 24 February, each group will email to the class a 5–8+ page essay sharing lessons learned, recommendations for best practices, and outstanding problems in the area studied by the group. During the week of 24 February, I will facilitate an online discussion in which members in the class may ask any other group questions about their topic and conclusions. Each member of the class should ask (at least) one original question of another group, and each member should help answer at least one question directed at their own group.

Credit for this portion of the course will be based on the individual memo, participation in breakout discussions, the final essay, and participation in the online class discussion.

**Final presentation (40%)** Over the final two weeks of the course, each student will present a poster\(^1\) applying the tools learned in class to their own research. Alternatively, students can take a published article in their field and show how better visuals would either more clearly convey the findings or cast doubt on them, or present an innovation in statistical graphics, preferably one which comes with software to help implement the innovation. The final presentation may address problems related to the topics pursued in the breakout group, but should represent primarily the work of the presenting

\(^1\) Posters are used as an alternative to slide presentations in many fields. Guidance on poster construction will be provided later in the quarter for students who have never made a scientific poster. Students presenting interactive graphics as part of their final presentation should bring a laptop displaying the interactive graphic, perhaps with a supporting poster explaining the project if needed.
student, not the group: this is a separate assignment, and it is usually more fruitful to tackle a second problem for the final presentation. Likewise, it’s useful for the final poster to be substantially different from the homeworks, though it may represent an evolution of a project explored in the homework assignments. Final presentations must be emailed to your instructor in PDF format for credit to be given.

NB: We will use Google Sheets to coordinate formation of breakout topics and groups, scheduling of breakout meetings, and scheduling of final posters. Google Sheets requiring your attention will be announced on the course mailing list. Prompt attention to Google Sheets requests is essential to keeping the course on schedule.

Course texts

Visual display books are expensive; students should order based on their interests. Descriptions at right may help select the most useful texts for permanent purchase. The starred texts are the most essential for purchase.


Up-to-date guide to data visualization implementing many of this courses’ recommendations in R’s ggplot2.


The most famous and possibly the best book on data visualization ever written. Fun to read and essential.


Classic on the design of data visuals from a statistical perspective, especially for exploratory data analysis with many conditioning variables.


The authority on R’s various graphics engines; excellent technical reference for both beginners and programmers.


Recommended for further reading


Julie Steele and Noah Iliinsky, eds. 2010. *Beautiful Visualization*. O’Reilly Media, Inc.


Tools

It’s easier than ever to create beautiful and effective scientific graphics, but not all graphical software is created equal. Many commonly used packages – particularly Microsoft Excel and its clones – combine inflexibility with poor default settings.

For the most part, students are not required to use a specific package, but are encouraged to use software that allows: (1) flexible generation of virtually any diagram, (2) command line or code interface, perhaps in addition to a graphical interface, and (3) widely usable output, such as postscript or PDF.

Recommended Software for Visual Display

**R.** In-class code examples will use the R statistical language, which has all these virtues in addition to being free, open source, and widely used. You can obtain R at [http://www.r-project.org](http://www.r-project.org). Throughout the course, I will provide example code in R and can only promise detailed homework help for the R package. At least one homework will require students to use R, so it’s worth downloading now. In particular, the course will provide readings and examples drawing on the popular ggplot2 graphics package and the instructor’s own tile graphics package, both available for R.

**Illustrator.** Adobe Illustrator is the industry standard for retouching postscript and PDF graphics. Unfortunately, it is also (a) very expensive, even with an academic license and (b) now only available as part of a subscription to a package of Adobe software (see the Tech Center page at the University Bookstore’s website for details). Illustrator is *not required for the course* but is worth considering as students develop their visualization skills, especially for touching up final illustrations.

**Other free tools.** Yau’s *Visualize This* discusses other tools for getting data off the web (like the Python programming language), constructing interactive graphics (like the processing language), and for working with maps (using svg). Although we will not cover these tools in class, they may be of use for student projects. A wealth of tools have emerged to work in conjunction with R to create interactive graphics, animations, and slides for the web (especially Shiny, but also rCharts, Slidify, gridSVG, and others).
Course outline

The readings for this course are complementary to the lectures and often cover topics or directions we don’t have time to get to in lecture. It is thus more important than usual for a statistics class that students should come to class having read the material assigned for that day. The reading load for this class is considerably longer (in pages, if not minutes) than the typical statistics class but is fun, quick, and essential: the best way to learn effective visualization is to see how other scholars do it. Some of the readings, particularly from the *Journal of Computational and Graphical Statistics* (JCGS), have technical portions, but in most cases these details can be skimmed unless/until you want to code up these methods for yourself. Readings marked *Optional* are intended to be read now if you are interested in or working on the graphical problem described therein.

Note that if you are not familiar with R, you should begin reading the “optional” selections from Zuur immediately.

On some days, we will open class with a “Gallery” in which I will present for discussion several innovative or problematic visualizations (see the course site for a list). This will give everyone a chance to see the principles of the course in action, and learn from both the successes and mistakes of other scientists, including your instructor.

Part I: Theory of Visualization

**Tuesday, 7 January 2019 · Introduction**

*Optional:* Tufte, *Visual And Statistical Thinking*, pp. 5–15

**Thursday, 9 January – Thursday, 16 January · Principles of Information Visualization**

*Required:* Tufte, *VDQI*, all


Tuesday, 21 January – Thursday, 23 January · Cognitive Issues in Visualization

**Required:** Healy, Chapter 1


Ware, Ch. 1, 4, 5

**Optional:** Alain F. Zuur, Elena N. Ieno, and Erik H.W.G. Meesters. 2009. *A beginner’s guide to R*. Springer. Ch. 5–6 (for new R users)

Ware, Ch. 6

Rick Wicklin. 2011. “Visualizing airline delays and cancelations.” *JCGS* 20.2 (heatmap example)

Yau, Ch. 3–4

**Problem Set 1 Due Tuesday, 21 January in Class**

Tuesday, 28 January – Thursday, 30 January · Programming Visual Displays

**Required:** Healy Ch. 2–5, 8

**Suggested:** Murrell, Ch. 1–3, 6–7, 9–10

**Optional:** Murrell, Ch. 4–5, 8, 11–17 (on lattice, ggplot2, advanced grid, categorical data, maps, networks, 3D, dynamic and interactive graphics)


Yau, Ch. 5–6
Part II: Visualization for Statistical Applications

Tuesday, 4 February – Thursday, 6 February · Exploratory Data Analysis

Required: Cleveland, *Visualizing Data*, selections.


Healy, Ch. 7 (on maps)

Optional: Yau, Ch. 7–8 (on maps)


PROBLEM SET 2 DUE THURSDAY, 6 FEBRUARY IN CLASS
Tuesday, 11 February – Tuesday, 18 February · Visualizing Model Inference


Healy, Ch. 6.


Thursday, 20 February · Visualizing Model Robustness and Interactions


Tuesday, 25 February · Interactive Visual Displays

Required: “Tutorial: Building ‘Shiny’ Applications with R.”

[shiny.rstudio.com/tutorial]
Thursday, 27 February · Advanced LaTeX for Scientific Typesetting \textit{(lecture if time permitting)}

\textit{Recommended:} Tobi Oetiker. 2018. \textit{The Not-So-Short Introduction to LaTeX.}
Version 6.3. Ch. 1–3 and possibly 6.

Version 2.46h. (full modern type support for advanced LaTeX users).

\textbf{Part III: Student Presentations}

Tuesday, 3 March – Thursday, 12 March · Final Poster Presentations

Students will have a chance to express preferred presentation dates, which we will accommodate as far as is feasible given the constraint of keeping the number of presentations roughly equal across dates.

\textbf{Problem set 3 due Thursday, 12 March in class}