

## The State of the Art in Creating Visualization Corpora for Automated Chart Analysis

Chen Chen, Zhicheng Liu



## Background













## Background







Interpretation









### An Example: REV





Poco and Heer. Reverse-Engineering Visualizations: Recovering Visual Encodings from Chart Images

collected 4,318 charts from Vega, Quartz, and academic papers; annotated the bounding box, content, and role for each text element; evaluated text recognition pipeline using the corpus.





However, we have observed that many papers do **not** 

- Use existing corpora but build own corpus instead
- Make the corpora with annotations publicly available
- Release their annotation tools
- Examine how different chart corpora influence model performance

### Motivation



#### Little research on:

- the common practices for creating the corpora
- what constitutes a good chart corpus
- the potential pitfalls and gaps in existing corpus-based research

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It is difficult to compare chart analysis techniques measure scientific progress identify unsolved research problems

## Survey Goal



A comprehensive understanding of the state of the art in creating corpora for automated chart analysis research

- summarize current patterns and practices of corpora creation
- identify research gaps and opportunities
- recommend desired properties of benchmark corpora
- discuss research ideas on tools and methods

## Outline



### • Survey

- Method
- Task Taxonomy

(1) Why: the goal; (2) How: the method; (3) What: the output

#### • Corpus Property

(1) Format; (2) Scope; (3) Collection Method; (4) Annotations; (5) Diversity

- Challenges and Future Directions
  - Open opportunities
  - Desire properties of benchmark corpora
  - Desired tools

## Survey Method



#### • Search 41

- Start with AI4VIS [WWS\*21] and ML4VIS [WCWQ21]
- Three criteria: primary contribution, corpus description, and chart design

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#### • Search 41

- Start with AI4VIS [WWS\*21] and ML4VIS [WCWQ21]
- Three criteria: primary contribution, corpus description, and chart design
- Augment 56
  - Graph traversal over citation network
  - Excluded papers before 2007

### Overview of 56 Chart Corpora





#### 14

# Bottom-up Coding task

### Why: the goal

- Create a chart corpus
- Extract chart semantics
- Modify an existing chart
- Generate chart designs automatically
- Retrieve charts matching certain criteria
- Generate natural language descriptions



Battle et al. Beagle: Automated Extraction and Interpretation of Visualizations from the Web





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Figure 1: Chart Redesign. Left: A pie chart of NIH expenses per condition-related death. The chart suffers from random sorting, highly saturated colors, and erratic label placement. Right: Plotting the data as a sorted bar chart enables more accurate comparisons of data values [6, 20].

Savva et al. ReVision: Automated Classification, Analysis and Redesign of Chart Images



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Hu et al. VizML: A Machine Learning Approach to Visualization Recommendation



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Hoque and Agrawala. Searching the visual style and structure of d3 visualizations



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#### Rapid Decline in Brazilians' Assessment of Economy

Current economic situation in Brazil is ...

100%



**Q1:** Which year has the most divergent opinions about Brazil's economy?

**Answer: 2015** 

**Q2:** What is the peak value of the orange line?

Answer: 87

Masry et al. ChartQA: A Benchmark for Question Answering about Charts with Visual and Logical Reasoning



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#### How: the method

- modern neural networks
- classic machine learning
- heuristics-based algorithms



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- heuristics-based algorithms

#### What: the output

- chart components
  - marks, encodings, layouts...
- synthesized descriptions
  - caption, summarization...
- derived properties
  - quality, similarity...

### Coding and Analysis corpus property



#### Format

#### Scope

- chart type
- design variation

### **Collection Method**

#### Annotations

- annotation type
- annotation method

### Diversity



overview chart semantic availability model compatibili

#### Bitmap



#### SVG

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#### Program

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"description": "A bar chart that directly encodes color names in the data.",
"data": {
"values": [
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"color": "red"
"b" - 28
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D: 55
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"color": "blue",
"b": 43
}
},
"mark": "bar",
"encoding": {
"×": {
"field": "color",
"type": "nominal"
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"v": {
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"type": "quantitative"
"color": {
"field": "color".
"type": "nominal".
"scale": null
}
1

https://vega.github.io/vega-lite/examples/bar\_color\_disabled\_scale.html



overview chart semantic availability model compa



■Bitmap ■Svg ■Program

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chart semantic availability model compatibility



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overview chart semantic availability model compatibility



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overview chart semantic availability model compatibility

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(c) Vega-Lite



overview chart semantic availability model compatibility

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	(b) Plotly

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overview chart semantic availability model compatibility

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overview chart semantic availability model compatibility

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(c) Vega-Lite



chart semantic availability model compatibility



\* \* \* EUROVIS Leipzig 2023

overview chart semantic availability model compatibility

Bitmap charts are naturally compatible with CNNs.





overview chart semantic availability model compatibility

Bitmap charts are naturally compatible with CNNs. SVGs could be better analyzed with GNNs.





#### **Format Scope Collection Method Annotations Diversity** definition chart type design variation



Assumptions or inclusion criteria during the chart selection process. They are usually specified to constrain the research problem space to achieve feasible solutions.





Assumptions or inclusion criteria during the chart selection process. They are usually specified to constrain the research problem space to achieve feasible solutions.

We identified two kinds of scopes:

- Chart type
- Design variation



definition chart type design variation

Chart Type	Frequency	Percentage
Bar	38	73.07%
Line	31	59.62%
Pie	18	34.62%
Scatterplot	16	30.77%
Infographics	9	17.31%
Area	9	17.31%
Map	8	15.38%
Treemap	4	7.69%
Boxplot	4	7.69%
Heatmap	3	5.77%
Table	3	5.77%
Venn	3	5.77%
Parallel Coordinate	3	5.77%
Sunburst	3	5.77%
Donut	3	5.77%
Node-link Diagram	3	5.77%
Radar	2	3.85%
Matrix	2	3.85%
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Design Variation Type	Assumption	Relevant Corpora
composite arrangement	only multiple-view charts no multiple-view charts no layered charts	[CZL*20] [CAM*18,WTD*20,PH17,HGH21,LWL*20] [JKS*17,PH17,CJP*19]
mark and glyph	no abstract icons or symbols only proportion-related charts only timeline-related infographics no handmade sketches no 3D effects	[JKS*17] [QSC*20, CZW*19] [CWW*19] [JKS*17, CAM*18, SDHL15] [SKC*11, DWS*22, CJP*19]
chart component	chart must have a legend axes being at the left and bottom	[PMH17, MKT22] [SKC*11]
coordinate space	in Cartesian coordinate space	[WTD*20,PH17]



Collection method describes how charts in a corpus were collected. We have observed four kinds of collection methods.

- reusing and transforming existing corpus
- web crawling
- manual curation
- computer-aided generation



definition reuse web crawling manual curation auto-generation size vs. method

Out of the 56 corpora:

- 17 are publicly available
- 9 were generated by modifying existing corpora
- only 4 corpora (FigureQA [KAM\*18], VIF [LWL\*20], SciCap [HGH21], REV [PH17]) were reused in subsequent works



definition reuse web crawling manual curation auto-generation size vs. method

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Transformations in those 9 corpora:

- Adding new charts to increase size or diversity
- Adding new annotations to support new tasks



Gather charts matching certain criteria from targeted sources automatically.



definition reuse web crawling manual curation auto-generation size vs. method



Gather charts matching certain criteria from targeted sources automatically.

Web crawling sources:

- <u>Search engines</u> e.g., Google Image Search
- <u>Galleries of online charting tools</u>, e.g., Tableau, Vega-Lite
- <u>Public documented materials</u>, e.g., online Excel sheets
- <u>Public scholarly repositories</u>, e.g., DBLP, Semantic Scholar
- <u>Public data sharing platforms</u>, e.g., the Pew research, Our World In Data



When the quality and variation of chart design matters more than the size of a corpus, some works such as Cui et al. [CZW\*19] decided to collect charts manually.



When the quality and variation of chart design matters more than the size of a corpus, some works such as Cui et al. [CZW\*19] decided to collect charts manually.

Advantages:

- they could inspect each chart candidate and decide if they would like to include it in the corpus
- The sources for web crawling are still useful



definition reuse web crawling manual curation auto-generation size vs. method

To use computer charting tools to generate a corpus.

- Underlying datasets
  - Synthetic ones by varying types and distributions
  - Real ones online, e.g., World Development Indicators
- Charting tools
  - Matplotlib
  - Vega-Lite
  - Bokeh
  - GeoPandas
  - **Timeline Storyteller**



definition reuse web crawling manual curation auto-generation size vs. method







definition annotation type annotation method

Annotations are labels associated with charts in a corpus

- serving as ground truth for chart analysis tasks
- the sources where the charts are collected usually do not provide needed labels
- as reported in Battle et al. [BDM\*18], there is a lack of consistent metadata across different sources



definition annotation type annotation method

Annotation Type	Relevant Corpora
bounding box	for mark or glyph [LLJ*20, LLWL21, LWL21, CRMY17, CSG*20, QSC*20, HWWL21], for legend [LWL21, CSG*20, MGKK20, HWWL21], for axes [MGKK20, CRMY17, HWWL21], for text [LWL21, ZZC*21, PH17, CRMY17, SGCV19, CSG*20, MGKK20, SKC*11, HWWL21], for main chart area [LLWL21, DWS*22, HWWL21], for chart sub-views [CZL*20]
chart type	[BDM*18, JKS*17, TLL*16, CAM*18, KM18, SKC*11, CWG16, GZB12, DWS*22, CJP*19]
question-answer pair	[KHA20, MDT*22, KPCK18, KAM*18, MBT*22, CSG*20, CPL*22, MGKK20]
question-caption pair	[CZK*19, MKT22]
text role	[ZZC*21, CWG16, PH17]
infographics element type	[LWL*20, QSC*20]
pairwise style similarity	[SDHL15, MTW*18]
saliency map	[BKO*17]
aesthetics ranking	[FWD*19]



definition annotation type annotation method

In-house labeling: in-person process where a small group of people gathers to annotate charts manually; usually two considerations:

- user interface for annotation
- training procedure



definition annotation type annotation method

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- training procedure

Crowdsourcing: online process where workers from platforms such as Amazon's MTurk are recruited to annotate charts

\* \* \* EÜROVÎS Leipzig 2023

definition annotation type annotation method

Template-based generation: question-answer and chart-caption annotations can be generated based on pre-defined templates

• Compared to crowdsourcing, avoids high expenses, but lacks rich linguistic variation

definition annotation type annotation method



Template-based generation: question-answer and chart-caption annotations can be generated based on pre-defined templates

• Compared to crowdsourcing, avoids high expenses, but lacks rich linguistic variation

Automatic extraction: Application-specific API (e.g., bounding boxes in Matplotlib, data values in Excel)



definition impact on generalizability enhance diversity

Diversity measures how much the charts differ from one another.

## Why it is important?

• diversity is an under-explored property that significantly influence the scalability, generalizability, and robustness of developed techniques



definition impact on generalizability enhance diversity



Li et al. Structure-aware Visualization Retrieval



definition impact on generalizability enhance diversity

- source websites: to collect charts from multiple sources
- chart topics: to collect charts on various topics
- chart creators: to sample from online providers whose charts are created by a larger community of content creators
- scholarly document repositories: to enrich publication venues and increasing the year range



definition impact on generalizability enhance diversity

- underlying datasets: to generate a variety of diverse synthetic datasets for plotting
- style parameters: to enumerate the style parameters in the code
- visual questions and captions: to alleviate poor linguistic variations from templates
  - Design more diverse templates [CZK\*19, SS20]
  - Combine crowdsourcing, templates, and in-house labeling [MGKK20]
  - Adopt large language models [MDT\*20]

## Feature tags can be a better way

### beyond chart types

beyond chart similarity

tool/source-agnostic chart analysis

intelligent design generation

diversity quantification

understanding interaction&animation



(a) Spiral Heatmap

#### (b) Grouped Stacked Bar Chart

beyond chart types

#### beyond chart similarity

tool/source-agnostic chart analysis

intelligent design generation

diversity quantification

understanding interaction&animation

Chart quality (aesthetics, effectiveness, memorability, ...) is under-explored

"when visualization creators are seeking design ideas, <u>similarity may</u> <u>not be their primary desired criterion</u>; instead, they prefer alternative or bespoke designs to broaden the scope of consideration"

Bako et al. Understanding how Designers Find and Use Data Visualization Examples

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## Enhanced generalizability



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Current research on <u>automatic generation</u> <u>of chart design</u> mostly relies on a **program** chart corpus from a **single charting tool**.

It is worth thinking that <u>what techniques</u> <u>are required</u> to automate design ideas from various sources if we would like to <u>include bitmaps and SVGs</u>.

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No metric to measure diversity

- There is a clear need for systematic methods to evaluate chart diversity
- Such methods can guide chart selection processes

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## Interaction & Animation

- the logic for interactions and animations is usually hidden
- How to automatically capture them remains open



# Enhanced Chart Diversity within a Corpus

• little effort in enhancing diversity in terms of chart format

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Multi-level Fine-Grained Annotations

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## Enhanced Chart Diversity within a Corpus

• little effort in enhancing diversity in terms of chart format

# Multi-level Fine-Grained Annotations

• the lack of fine-grained annotations makes it difficult to reuse existing corpora for new tasks

Interactivity and Animation Understanding

 semantic abstract for describing them & methods for capturing and understanding them

Smart Web Crawler

• The implementation handles composition arrangements in HTMLs which can be random

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## Chart Pre-Processor

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## Mix-Initiative Annotating System

Dedicated research in human-AI collaboration for the annotation process is necessary


# Thanks for listening!



### **Corpus Properties**

format, scope, collection method, annotations, diversity

# **Opportunities**

- Beyond chart type
- Beyond chart similarity
- Tool/Source-agnostic analysis
- Design generation
- Diversity quantification
- Interaction & Animation



## **Towards Benchmark Corpora**

- Properties
  - Diversity
  - Multi-level Fine-Grained Annotations
  - Interactivity and Animation Understanding
- Needed tools
  - Smart web crawler
  - Smart image processor
  - Mix-initiative annotating system

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