Designing reports that will engage - not overwhelm - the senses

Created & Presented by
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Note: This advice is not intended to replace professional design assistance!

If you have the time and budget, I highly recommend hiring a professional graphic designer to polish your deliverables.

But often, schedules and budgets don't leave room for outside help, requiring moderators to act as their own graphic designers.

Think of the information on these pages as a starting point for learning some best practices for slide design, whether you are creating a comprehensive detailed report or a simpler presentation of findings.

At the end of this document, I have included a list of some of the design resources I used to create my conference presentation, as well as a few additional sites and tools I often rely on when writing and designing reports for my clients.

If you have any questions, please feel free to drop me a line at...

maria@researchscribe.com.

I am always happy to share tips and information and answer questions!

Another note: Reports are not presentations!

Presentations have the benefit of live narration, which allows us to keep them short and pithy. In contrast, qualitative reports must typically stand alone, which means they need to contain a lot more information.

This reality can lead to overloaded pages with too much text and no room for white space or graphic elements that will help the information "breathe."

By creating qualitative reports that adhere to good graphic design principles, we can reap additional dividends beyond simply looking good, including:

- Providing a more engaging and enjoyable experience for the reader

- Making information easier to understand, more memorable and more actionable
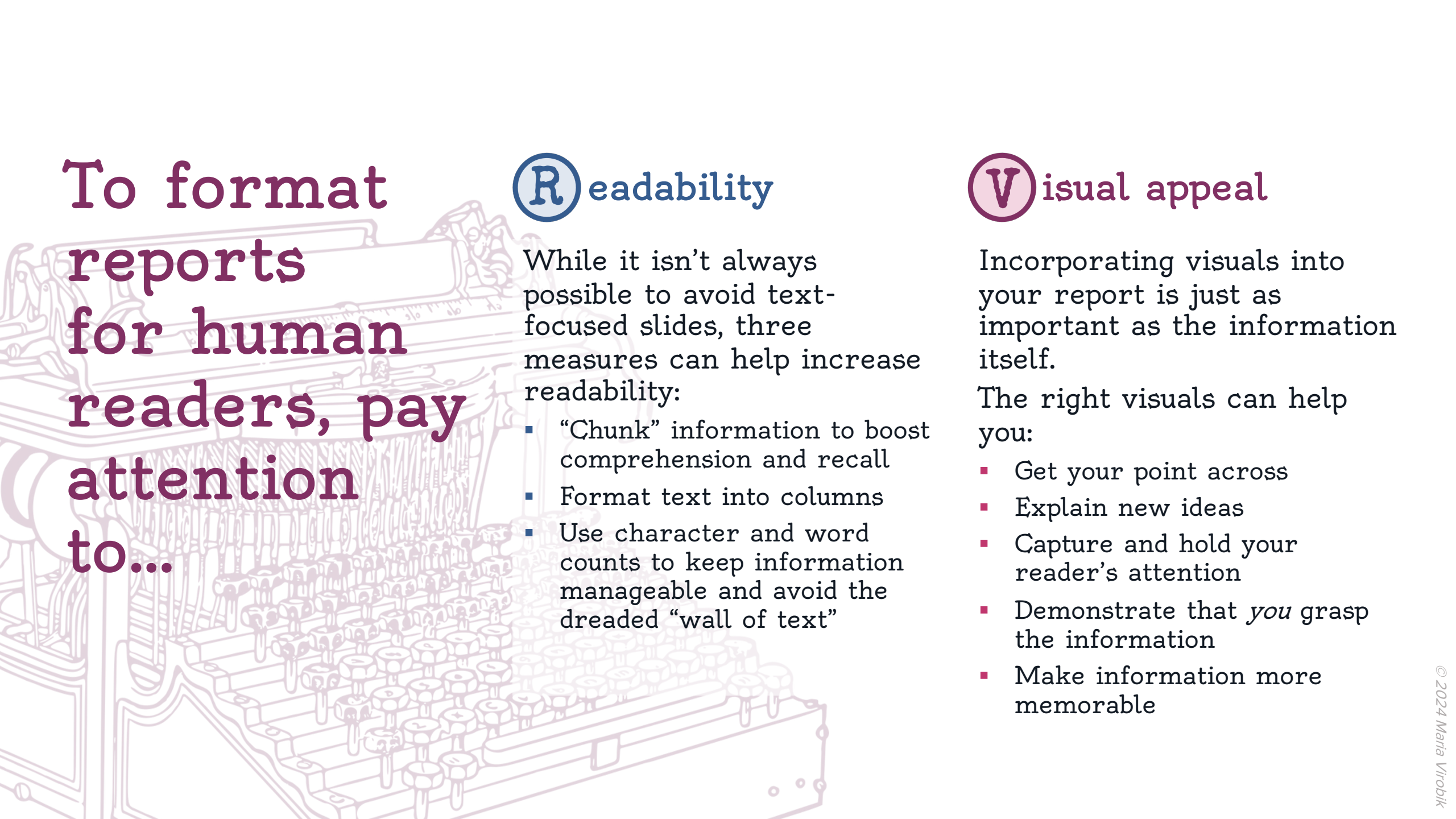
Science supports the importance of good design.

- For example, a Wichita University study concluded that in addition to improving reading comprehension, increased white space makes information less fatiguing to read and delivers a more satisfying reading experience.

  [Source]

- Other studies demonstrate that readers have a limited capacity to retain and process information. As a result, if an audience has to process or remember too much information, they may not understand the message being conveyed.

  [Source; see section on "Limited capacity."]
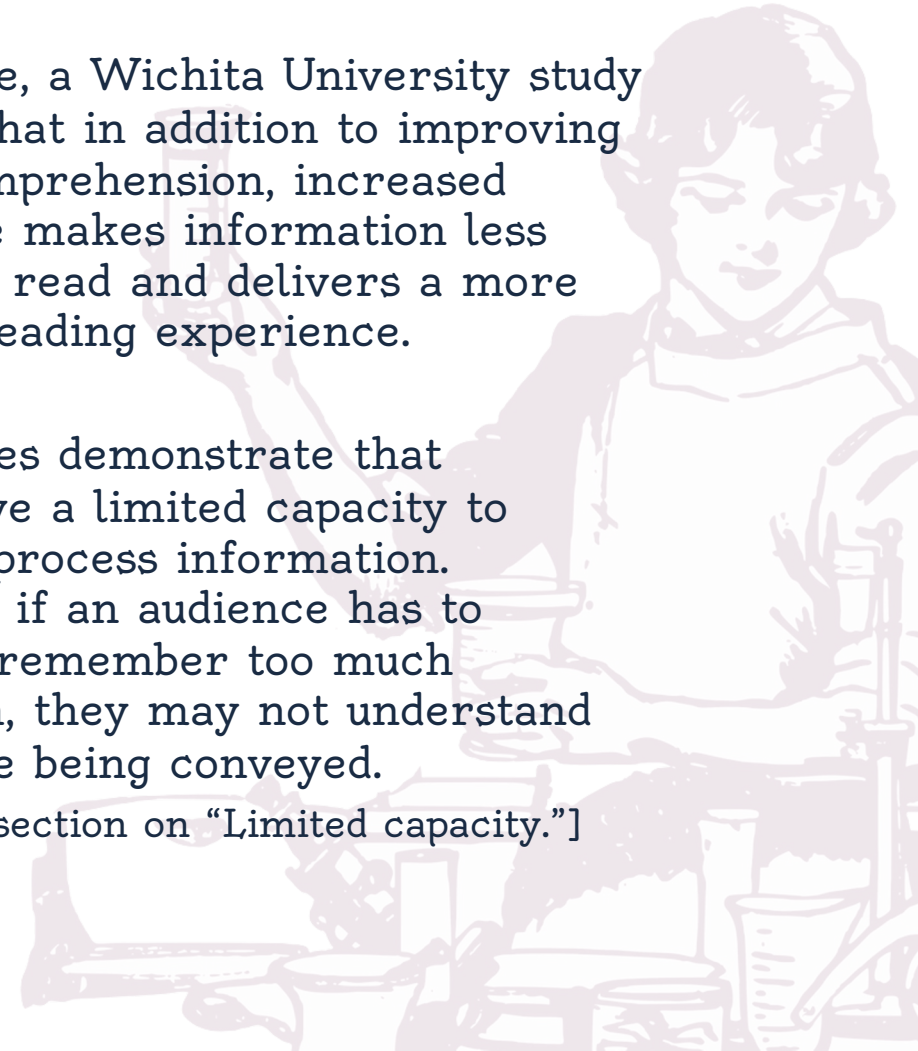
To format reports for human readers, pay attention to...

Ⓡeadability

While it isn't always possible to avoid text-focused slides, three measures can help increase readability:

- "Chunk" information to boost comprehension and recall
- Format text into columns
- Use character and word counts to keep information manageable and avoid the dreaded "wall of text"

Ⓥisual appeal

Incorporating visuals into your report is just as important as the information itself.

The right visuals can help you:

- Get your point across
- Explain new ideas
- Capture and hold your reader's attention
- Demonstrate that *you* grasp the information
- Make information more memorable

Three tips to
Ensure
Readability

Tip #1:
Chunk information to improve comprehension and recall

Humans naturally look for and create patterns in order to connect disparate items or concepts.

This is called "chunking." It helps our brains…

- Process data faster
- Understand information more easily
- Remember what we read

We can chunk information in different ways: using text, graphic elements or a combination of the two.

Think of restaurant menus: items are categorized or "chunked" by item type - appetizers, salads, main dishes, desserts.

Images that accompany the text can help illustrate the different categories and types of food offered.

"Chunking" menu information helps diners understand what types of food are available and immediately find what they want.
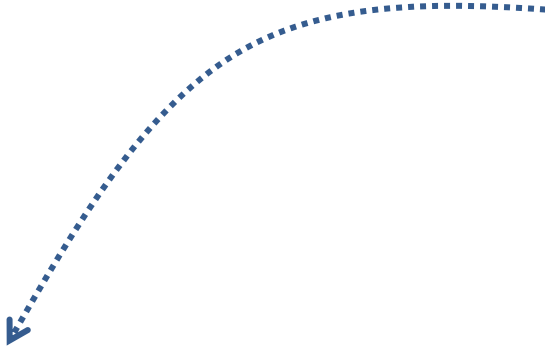

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Tip #1 Before & After: Chunking & Columns

"Chunking" information and formatting it into columns breaks up wall-to-wall text and makes information faster and easier to read and understand.

Before

About the Research

Background
Acme Grocery Co. is developing a marketing program that will send personalized offers and information to shoppers via text message. The company wanted to gauge consumer interest in the idea and identify necessary refinements prior to launch.

Objectives
Specific research objectives included:
- Understand Acme customers' current text messaging usage and preferences
- Determine customer expectations for marketing text messages from Acme
- Identify the ideal messaging frequency and content

Methodology
A total of 6, 90-minute focus groups -- two in each of three cities -- were conducted in March, 2022:
- Portland, OR
- Atlanta, GA
- Denver, CO

Screening criteria
Each group was comprised of current Acme shoppers age 21-64 who have primary or shared responsibility for their household's grocery shopping.

All respondents are smartphone users who send and/or receive at least five text messages a day.

After

About the Research

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Acme Grocery Co. is developing a marketing program that will send personalized offers and information to shoppers via text message. The company wanted to gauge consumer interest in the idea and identify necessary refinements prior to launch.

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- Identify the ideal messaging frequency and content

Screening Criteria
Groups were comprised of current Acme shoppers who fit the following specs:
- Ages 21-64
- Have primary or shared responsibility for household grocery shopping.
- Use a smartphone and send and/or receive at least five text messages a day

Tip #2:
Use columns to give eyes a break

Columns require less physical effort to read, which reduces fatigue.

While the default PowerPoint slide uses a single block of wall-to-wall text, *this is bad design.*

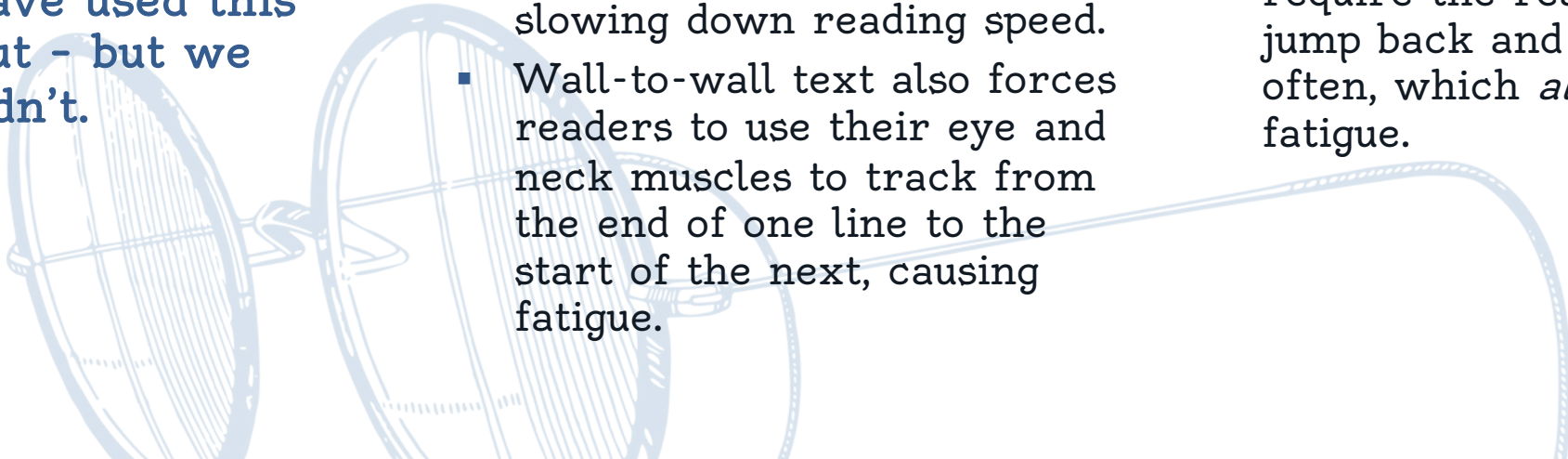**Most people (myself included!) have used this default layout - but we really shouldn't.**

Wonder why? The human eye. At normal reading distances, the arc of our visual field is only a few inches wide.

- Longer lines of text require readers to spend time and effort searching for the beginning of the next line, slowing down reading speed.

- Wall-to-wall text also forces readers to use their eye and neck muscles to track from the end of one line to the start of the next, causing fatigue.

Formatting content into multiple, narrower columns, makes information easier and faster to read.

But be careful - columns can't be *too* narrow, either.

- Overly narrow columns require the reader's eyes to jump back and forth more often, which *also* causes fatigue.

Tip #2 Before & After: Chunking & Columns

Moving the headline, narrowing the width of the text column and adding a graphic element in the background increases visual interest and makes the main points more prominent and easier to read.

Before

Grocery shopper text messaging preferences

Shoppers want the ability to specify:

- **Message frequency**
  - Most want to receive no more than one message each week; only a couple would like to hear from Acme more often (2-3 times per week).
  - Some shoppers also want to choose the specific day of the week and even time of day when Acme messages will arrive.
- **Message type/topic**
  - Shoppers want the flexibility to choose the types of messages they will receive (e.g., sale announcements/promotions, coupon offers, tips/recipes, new product announcements, in-store events).
- **Products/Categories of interest**
  - Many say it would be helpful if they could indicate the products or categories they are and *aren't* interested in hearing about (e.g., baby, pet, organic, gluten-free, etc.)

After

Grocery shoppers want the ability to tailor the messages they receive from Acme

Frequency

- Most want to receive no more than one message each week; only a couple would like to hear from Acme more often (2-3 times per week).
- Some shoppers also want to choose the specific day of the week and even time of day when Acme messages will arrive.

Message type/topic

- Shoppers would like to choose the types of messages they will receive (e.g., sale announcements/promotions, coupon offers, tips/recipes, new product announcements, in-store events).

Product/category

- It would also be helpful if shoppers can select the products or categories they are and *aren't* interested in (e.g., baby, pet, organic, gluten-free, etc.)
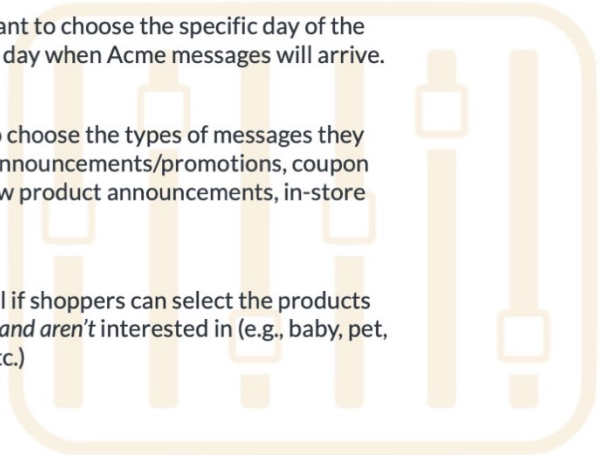
Tip #3:
Use word counts to keep text manageable

Adhering to word counts (per line as well as per page) helps in several ways:

- Prevents us from overwhelming the reader with too much text while ensuring that columns aren't *too* narrow
- Allows us to leave room for adequate white space
- Forces us to be deliberate about the information we include on each page

Here are some target word counts to aim for:

- **Per line:** Maximum of 12-15 words/ 50-70 characters
- **Per slide:** Maximum of 175 words
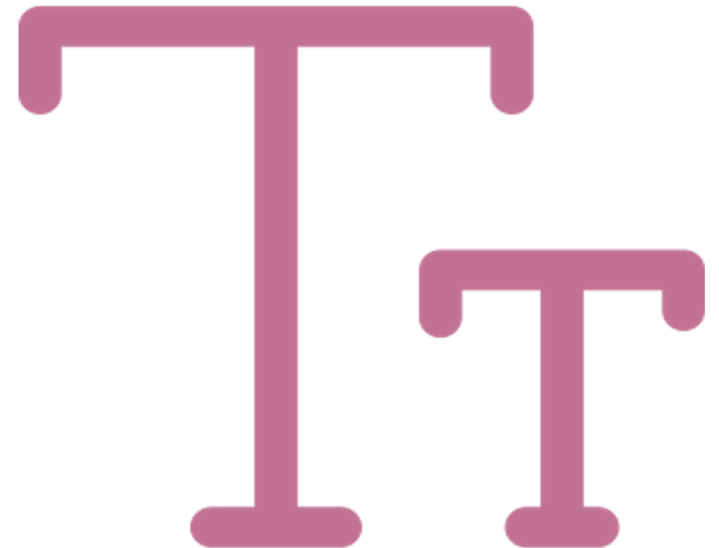
Limiting each line to 50-70 characters also results in the optimal font size for your slides. Just adjust the type size until your character count falls within this range.

Three tips to
Boost
Visual
Appeal

Here are three easy tips to help boost the visual appeal of qualitative reports:

Tip #1

Use your client's website and social media accounts for inspiration.

- Brand websites are a great resource for official colors, logos, fonts and product images.
- Official company or brand social media accounts on Facebook, Instagram and Pinterest often have great high-quality images with no rights issues.

Tailoring your report to fit the brand's look and feel shows that you took extra time to get the details right.

Tip #2

Think beyond stock photos.

Graphic elements in reports don't have to be pictures - and they *definitely* shouldn't be clip art!

- Consider using diagrams, word clouds or even graphics you create yourself.
- Keep your eyes peeled for inspiration. You may find it in previous reports, appealing color combinations you see out in the world, magazine stories, websites, even everyday objects like recipe cards and product packaging.

Tip #3

**Use a grid to guide layouts.**

Grids help to:

- Keep content organized
- Prevent cluttered slides
- Speed the design process by making it easy to determine where to place text, images and white space
- Provide a structure that carries throughout the entire document

Tip #1 Before & After: Brand website as design inspiration

Product packaging

Brand website

Oversized product image attracts attention and immediately conveys the slide topic
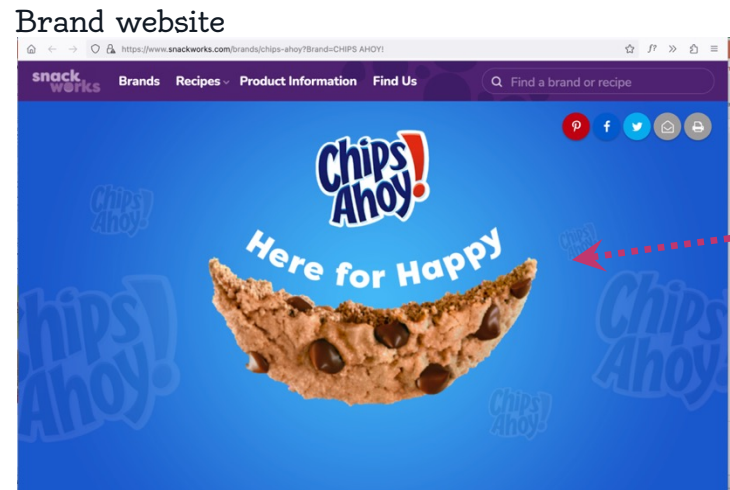
Background gradient and font mirror the brand's website

Before

What makes the ideal cookie?

Consumers say it must have the following:

- **Good taste.** Taste is the top consideration; if kids don't like the taste, cookies will go uneaten. While some adults admit to keeping a "secret stash" of more gourmet "adult" cookies, all agree that cookies purchased for family consumption must meet the "kid test."
- **Right texture.** While consumers vary on their preferred cookie texture (chewy vs. crunchy), they want the cookies they purchase to meet their expectations.
- **Trusted brand.** Many look for a brand (or brands) they trust because they know they will deliver on quality and consistency.
- **Good price.** Shoppers often look for sales and coupons for their favorite brands, which makes it easier to fit these "nice to have" items into their grocery budget.

"If my kids won't eat them, cheap cookies aren't worth the price." Portland Mom

"I won't buy an off-brand cookie. I don't trust unknown brands." Denver Shopper

After

What makes the ideal cookie?

Tastes good
Cookies purchased for family consumption must pass the "kid test"

Texture I like
Whatever their preference (chewy or crunchy), the cookie must deliver the right texture

Brand I trust
Trusted brands deliver quality and consistency

Good price
Brands that offer frequent sales and coupons make it easier to fit this non-essential treat into their grocery budget

"I won't buy an off-brand cookie. I don't trust unknown brands." Denver Shopper

"If my kids won't eat them, cheap cookies aren't worth the price." Portland Mom

Note: This slide was created as a design example and is not from an actual client project.

Tip #2 Before & After:
Everyday items as design inspiration

You can find an editable template for this recipe card in *"Grids & Recipe Card Template"* linked here.

Before

Participants say the "ideal" cookie would include a variety of healthy ingredients

Desired components:
- All natural
- Organic ingredients (sugar, flour, butter)
- Low in fat and carbohydrates
- Fortified with necessary vitamins and minerals
- Added fiber
- Max 10-12 grams of sugar
- 100 calories or less
- 20-25 grams of protein

After

Participants say the "ideal" cookie would include a variety of healthy ingredients

Recipe for The "Ideal" Cookie

Ingredients:
All-natural
Organic ingredients (sugar, flour, butter)
Low in fat
Low in carbohydrates
Fortified with necessary vitamins and minerals
Added fiber
Max 1-2 grams of sugar
2-3 grams of protein
20 calories or less

While this example is food-related, the recipe card format can easily be adapted to describe any "ideal" product concept - including services, package designs, etc.

Tip #3 Before & After: Use a grid to guide your layout decisions

Magazines use grids to structure their pages. This makes it easy for editors to decide where to add text, images and white space.

The result is a visually balanced page that is easy and enjoyable to read.

Qualitative reports and presentations can also benefit from using grids.

A 12-column grid (like the one in the background of this page) can be adapted to create slides with two, three or four columns.

Using a grid helps to:

- Keep content organized

- Prevent cluttered slides

- Speed the design process by making it easy to determine where to place blocks of text, images and white space

- Establish a structure that carries throughout the entire document, ensuring cohesiveness and consistency - even if the elements on each slide are different

Here are just a few examples of the layouts you can create using a 12-column grid

Two- and four-column layouts work especially well with widescreen (16:9 aspect ratio) slides.

You can find transparent, resizable grids in "Grids & Recipe Card Template" linked here.

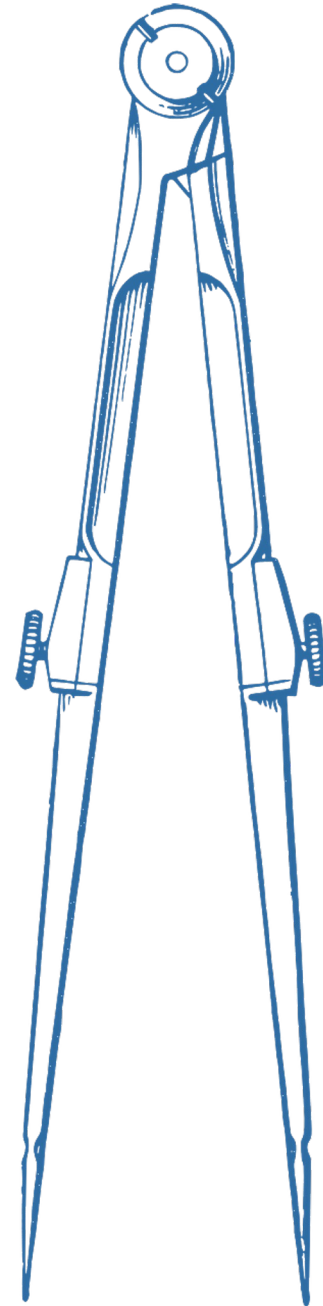For letter-sized slides, a three-column layout might be more appropriate (although four columns can work with this size as well).

Design Resources

The next page lists a few of my favorite free resources for high-quality stock photography, fonts, slide templates and other tools.

Design Resources

Free, high-quality images:

- Pixabay (also includes vectors and illustrations)
- Pexels
- Unsplash
- Burst from Shopify

Specialized stock photo sites:

- nappy.co - high-res photos of Black and brown people
- WOCINTECH - photos featuring women of color offered under the Creative Commons Attribution license; requires attribution
- Gender Spectrum Collection - images of trans and non-binary models

Lists of additional free stock photo resources:

- 22 Amazing Sites With Breathtaking Free Stock Photos (updated 2023)
- Best free stock photos 2024
- everypixel.com - searches photos from 22 free stock image websites in one place.

Free slide templates:

- Slidedocs - ebook + templates from Duarte, Inc.
- Diagrammer - over 4,000 downloadable templates from Duarte that can be used to show relationships/steps/processes
- 24Slides - free templates for PowerPoint and Google Slides

Free fonts:

- Google Fonts - free, open-source fonts

Free font pairing tools:

- fontpair.co
- Bold Web Design font combinations for web designers (that work well for PPT, too!)
- Canva's ultimate guide to font combinations

Webpage font ID tool:

- WhatFont - browser plug-in (for Chrome and Safari)/bookmarklet (for Firefox) that identifies fonts used on a website - beats slogging through source code!

Color inspiration:

- Color Hunt - color palettes for designers and artists
- Coolors - quick, easy color palette generator
- Canva's palette generator - create color palettes from photos
- Creative Bloq - list of additional free color palette apps

If you have favorite resources that aren't listed here, let me know! Get in touch at maria@researchscribe.com.

Questions?
Comments?
Get in touch!

If you have questions about the information in this handout or would like to share suggestions or resources for future versions of this handout, please send me an email or give me a call. I would love to hear from you!

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