How to Easily Create a Quadrant Chart in Excel

Authored by

stats writer

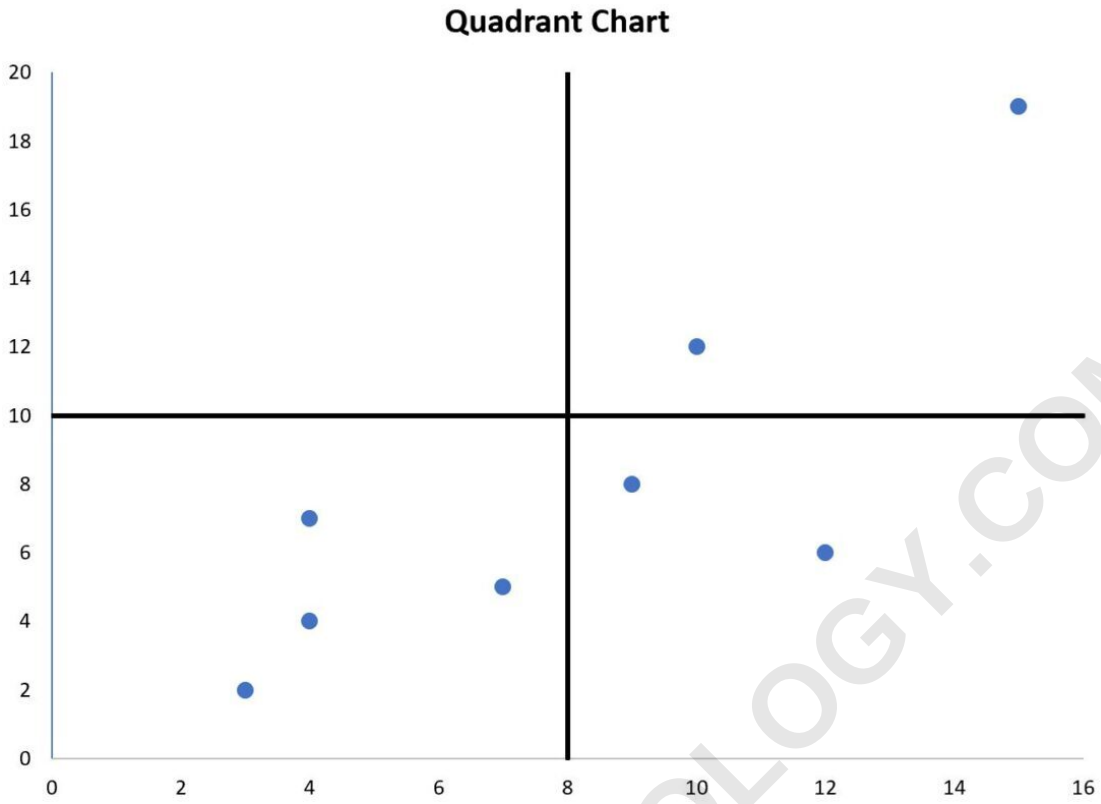
November 30, 2025

Creating a Quadrant chart in Excel is a powerful method for enhancing basic data visualization. Unlike a standard scatter plot, which merely displays the relationship between two variables, the quadrant chart divides the plotting area into four distinct sections based on predefined or calculated thresholds (often the mean or median of the data). This technique allows analysts and decision-makers to quickly categorize data points and identify items requiring specific attention or action.

The process, while straightforward, requires careful execution, particularly in defining and adding the intersecting reference lines that establish the quadrants. We will guide you through a detailed, step-by-step tutorial, demonstrating how to transform raw data into a clear and insightful quadrant chart using native Excel features. Once the quadrants are created, the chart can be further adjusted with customized colors, labels, and other formatting options to maximize analytical utility.

A **quadrant chart** is a specialized type of visualization derived from a scatter plot. It is designed to visualize bivariate data by partitioning the graph into four regions, defined by two central reference lines (the X and Y thresholds). Each quadrant typically represents a different performance category, making it an indispensable tool for strategic analysis and portfolio management by providing immediate context for data points.

This tutorial provides an in-depth, step-by-step example of how to construct a perfectly aligned quadrant chart in Excel, resulting in the following professional output:



Step 1: Define and Enter the Dataset

The foundation of any robust data visualization lies in accurately defining and inputting the source data. For a quadrant chart, you must have paired data points: one variable for the horizontal axis (X-axis) and one for the vertical axis (Y-axis). Ensure your data is organized into two adjacent columns in your Excel worksheet, typically with headers defining the variables.

For this exercise, we will use a sample dataset consisting of eight paired observations. It is highly recommended to place your data starting in cell A1 or A2, reserving the first row for headers, which helps Excel interpret the data range correctly during chart generation.

Let's enter the following dataset of x and y values into the Excel spreadsheet, starting in cell A2:

	A	B	C	D	E	F
1	**x**	**y**				
2	3	2				
3	4	4				
4	4	7				
5	7	5				
6	9	8				
7	10	12				
8	12	6				
9	15	19				
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Note that this data setup is critical. The first column (Column A) will automatically be assigned as the independent variable plotted on the **X-axis**, and the second column (Column B) as the dependent variable plotted on the **Y-axis**.

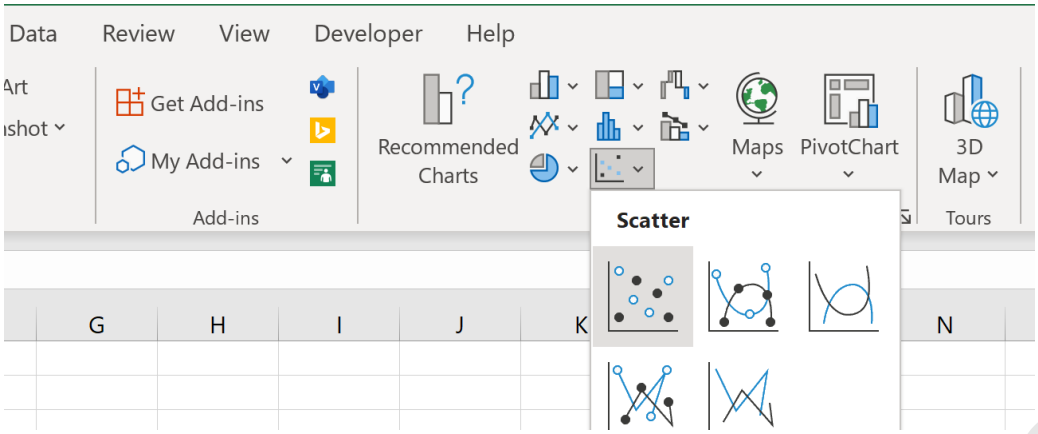
Step 2: Create the Initial Scatter Plot Base

The scatter plot serves as the foundational element for the quadrant chart. It provides the canvas upon which we will draw our dividing lines. Excel offers several chart types, but the Scatter chart is the only appropriate choice for plotting bivariate data points accurately.

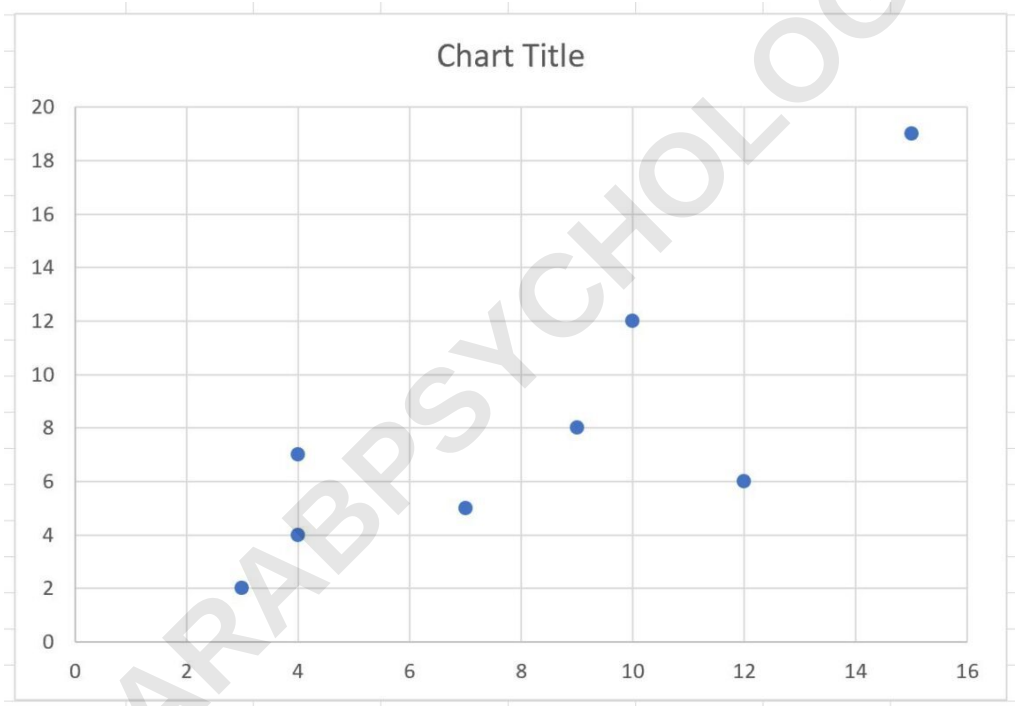
To initiate the chart creation, highlight the cells containing your raw data (range **A2:B9**). Navigate to the main menu ribbon and follow these sequential steps to insert the chart:

Click the **Insert** tab located at the top of the Excel window.
Locate the **Charts** group within the Insert tab.
Click the **Scatter** chart option (it typically looks like scattered dots). Select the default option that displays only markers.

This sequence is vital for ensuring Excel correctly maps the data series, creating the visual foundation for our analysis.



Upon completion of this step, Excel will automatically insert the following preliminary scatter plot based on your selected data range:



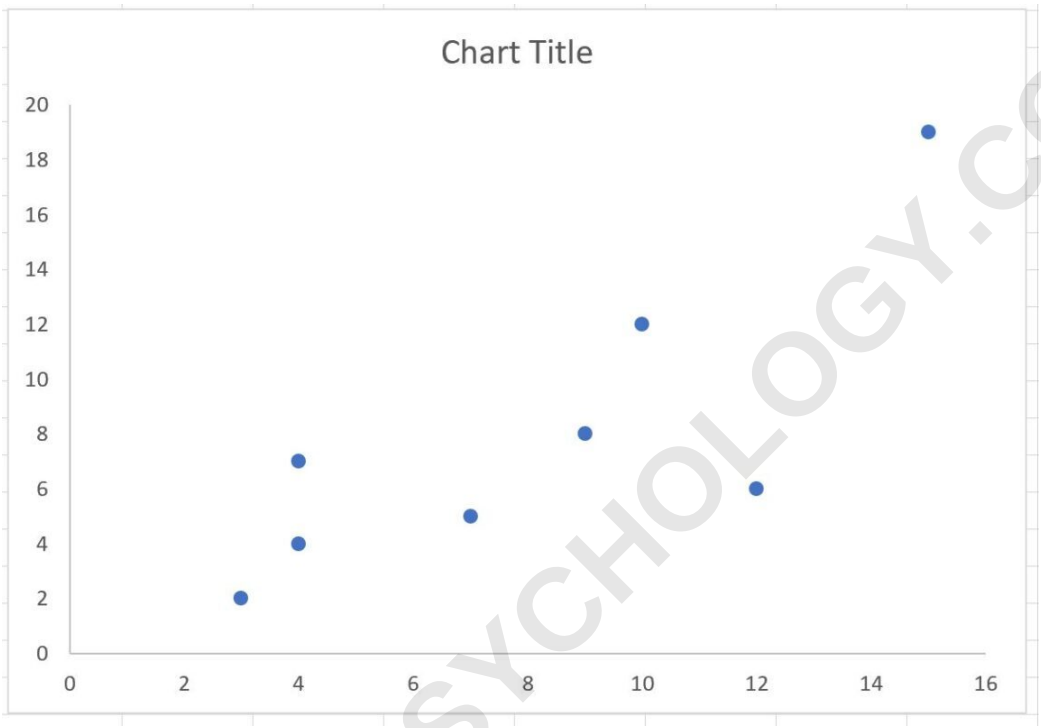
Step 3: Prepare the Canvas by Removing Default Gridlines

The default gridlines and axes in Excel charts are often distracting and interfere with the visual clarity required for a proper quadrant separation. To clearly define the four distinct regions of the quadrant chart, we must first remove the automatic horizontal and vertical gridlines that Excel adds by default.

To clean up the chart area:

Click directly on any of the horizontal gridlines displayed on the chart area.
Press the **Delete** key on your keyboard.
Repeat this process for the vertical gridlines.

Removing these elements ensures that when we introduce our precise reference lines in the subsequent steps, they are the only visual dividers present, thereby maximizing the impact and interpretive clarity of the resulting data visualization.



Step 4: Calculate the Central Thresholds for X and Y Axes

To establish the four quadrants effectively, we must determine where the central dividing lines--the threshold lines--will intersect. These lines are crucial as they define the criteria for categorization. For this guide, we will use the mean (average) of the observed X and Y values as our central dividing points.

We need two separate data series to represent the reference lines: one for the horizontal line (Y-axis threshold) and one for the vertical line (X-axis threshold). These lines must span the entire range of the chart, requiring us to calculate the minimum and maximum observed values as well as the averages for both axes.

Here is the detailed methodology for calculating the necessary data points:

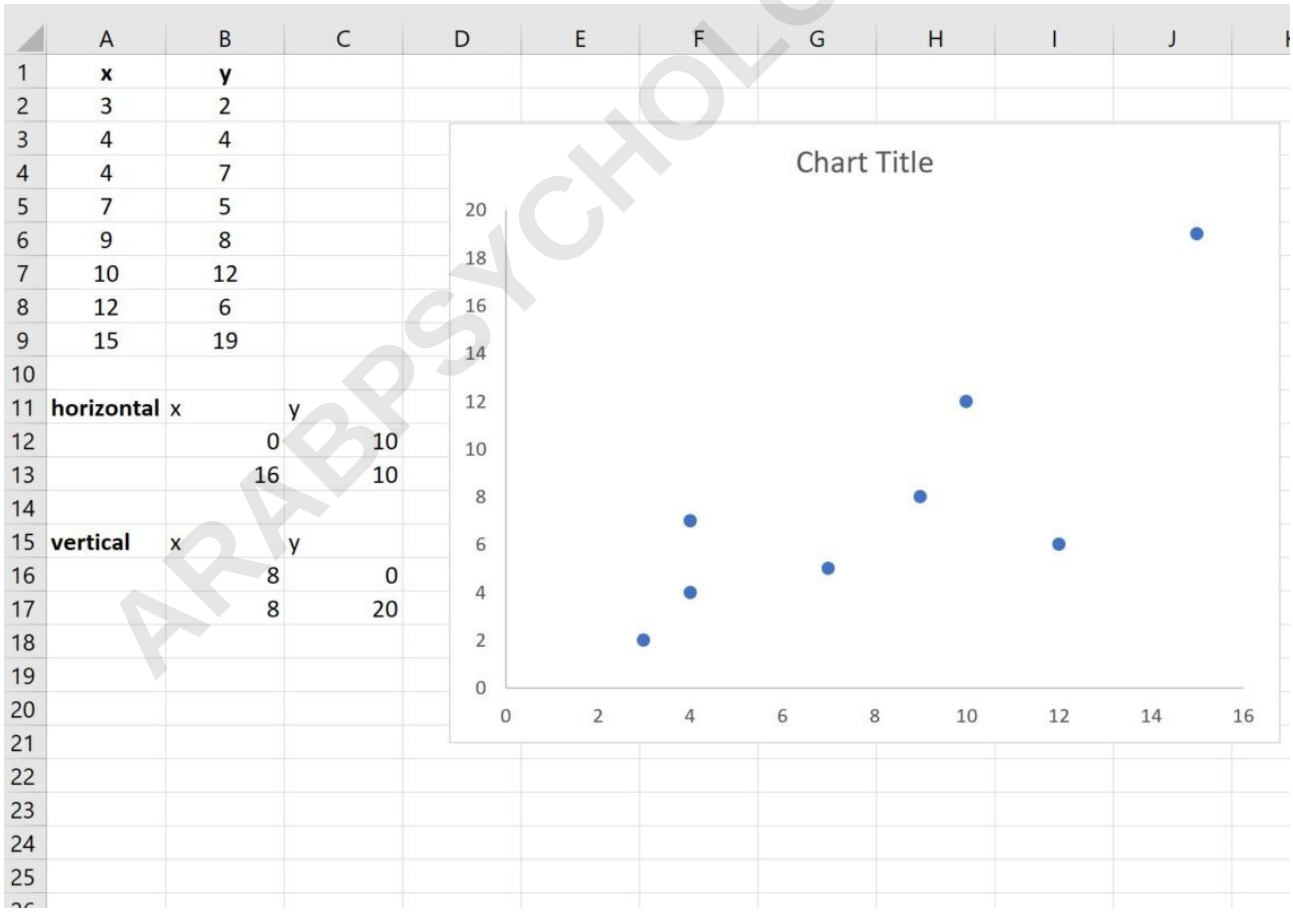
Data for the Horizontal Reference Line (Y-Threshold)

x-values (Input Range): The minimum and maximum observed values of the X-axis data (e.g., calculated using **MIN(A2:A9)** and **MAX(A2:A9)**).
y-values (Constant Threshold): The calculated average of the Y-axis data points (e.g., **AVERAGE(B2:B9)**). Both x-points are paired with this constant y-value.

Data for the Vertical Reference Line (X-Threshold)

x-values (Constant Threshold): The calculated average of the X-axis data points (e.g., **AVERAGE(A2:A9)**). Both y-points are paired with this constant x-value.
y-values (Input Range): The minimum and maximum observed values of the Y-axis data (e.g., **MIN(B2:B9)** and **MAX(B2:B9)**).

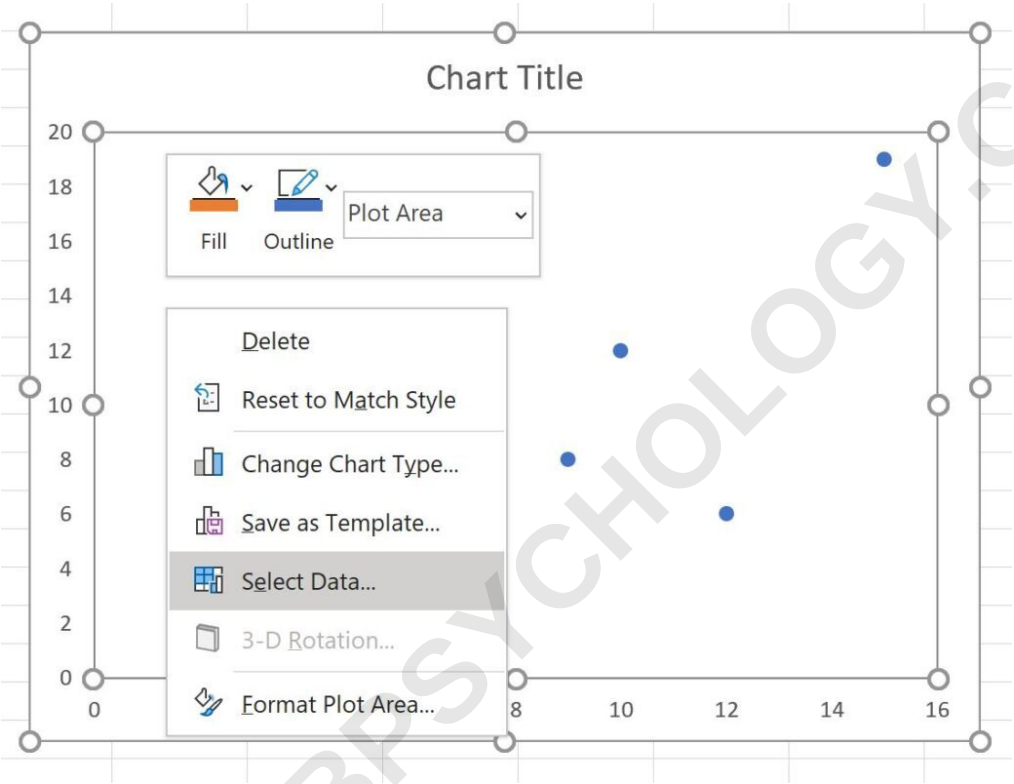
The following screenshot shows how to calculate the values for both the horizontal and vertical lines below the primary dataset:



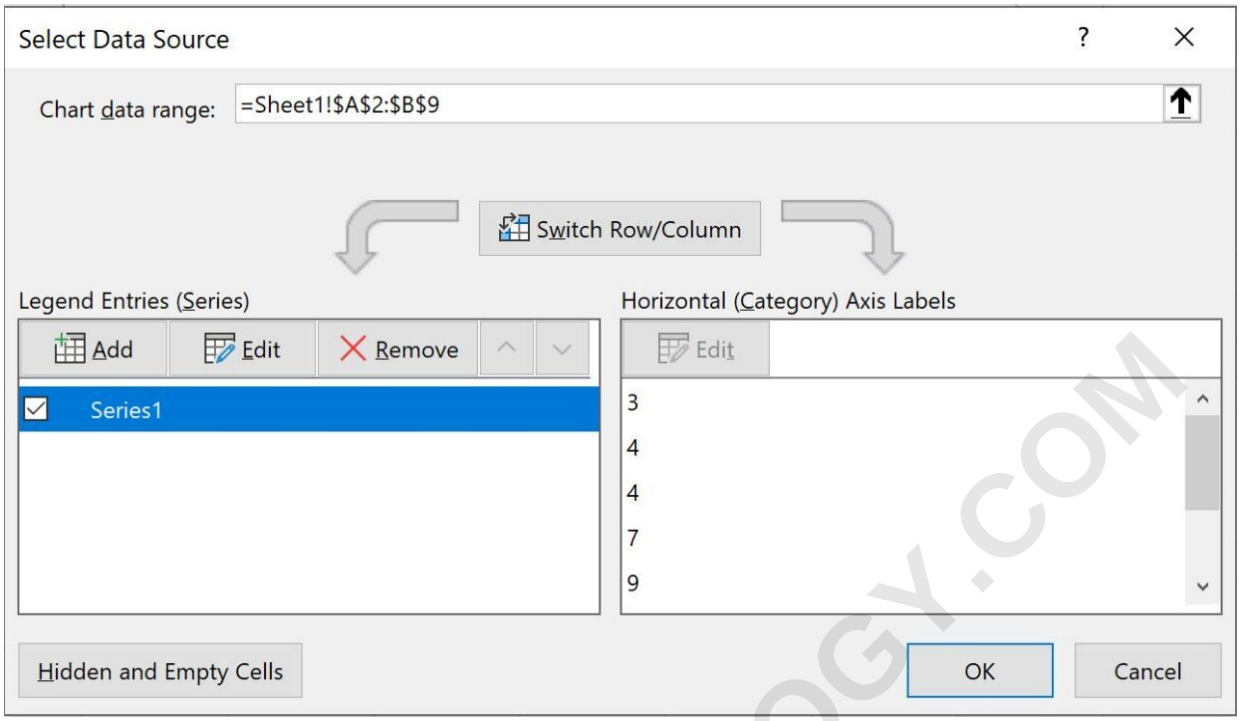
Step 5: Integrate the Horizontal Quadrant Line Series

With the threshold data calculated, we now introduce this data as a new series onto our existing scatter plot. We will start by adding the data for the horizontal line, which establishes the Y-axis threshold.

First, right-click anywhere within the scatter plot and click **Select Data**. This action opens the dialog box necessary for managing the chart's data sources.



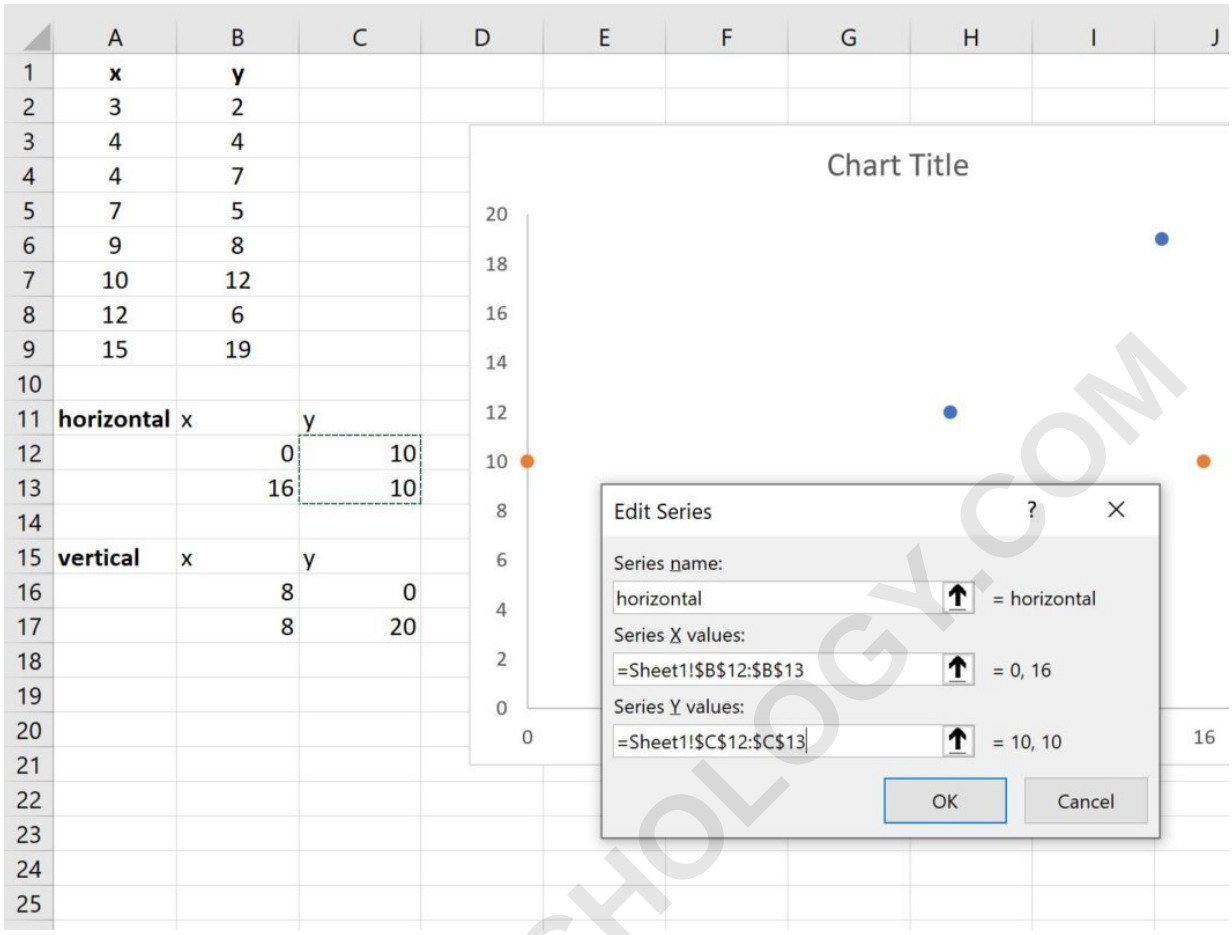
In the 'Select Data Source' window, click the **Add** button to define a new series for the chart:



In the 'Edit Series' window that appears, populate the fields using the calculated data for the horizontal line:

Enter a descriptive name (e.g., "Horizontal Threshold") in the **Series name** box.
Select the cell range containing the minimum and maximum X values (e.g., **B12:B13**) in the **Series X Values** box.
Select the cell range containing the constant Y average (e.g., **C12:C13**) in the **Series Y Values** Box.

After verifying the ranges, click **OK**:



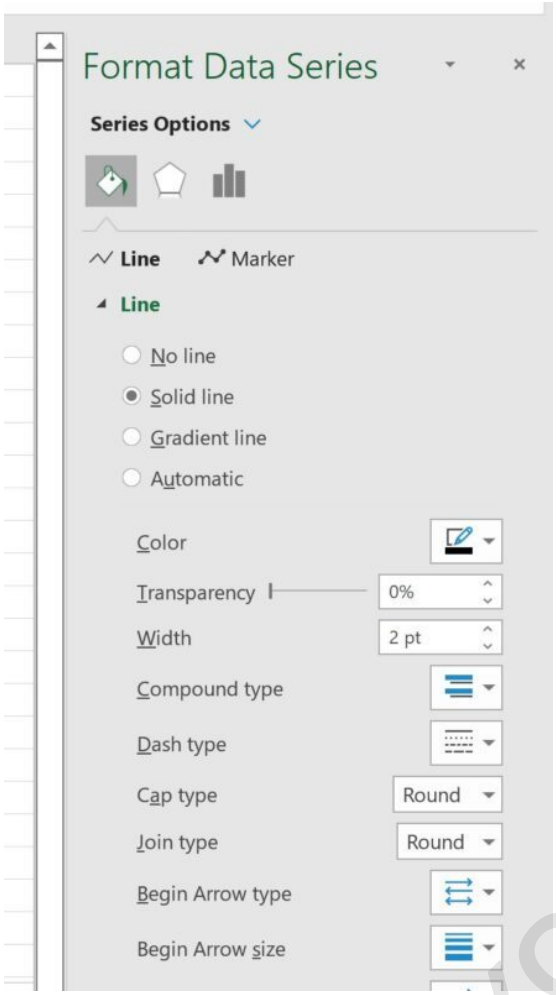
Two orange dots will be added to the plot, representing the endpoints of the new series.

Step 6: Format the Horizontal Line and Remove Markers

To transform the two new points into a continuous dividing line, we must adjust the series formatting. Click on either of the newly added dots to select the entire series and open the **Format Data Series** panel on the right side of the screen.

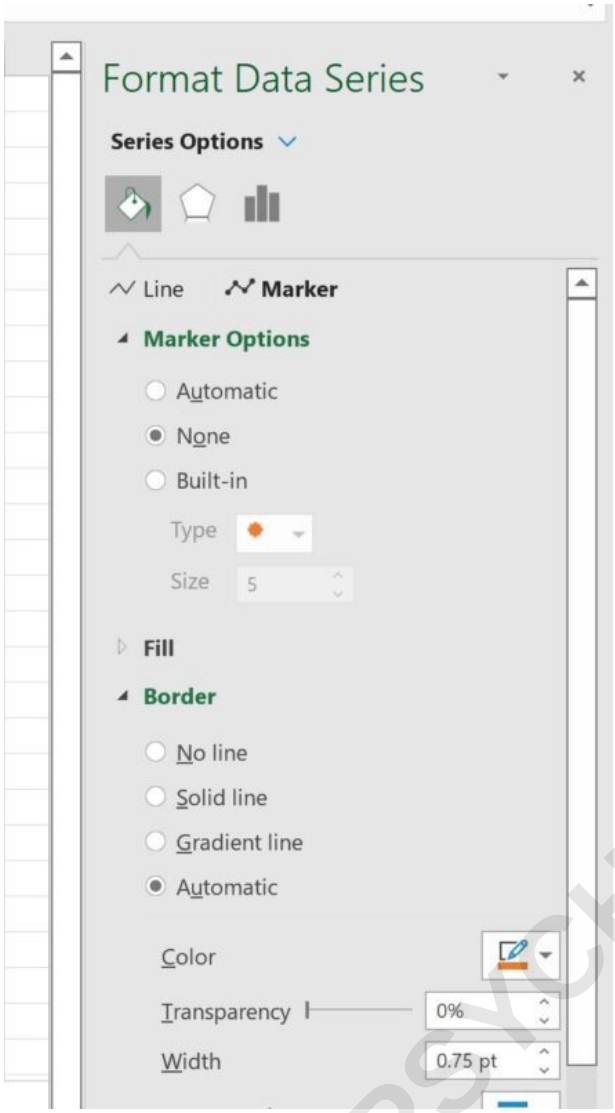
First, focus on the line connectivity. Click the **Fill & Line** icon (the paint bucket). Under the Line options:

Select **Solid line** to connect the two points.
Choose a high-contrast **Color**, such as Black.

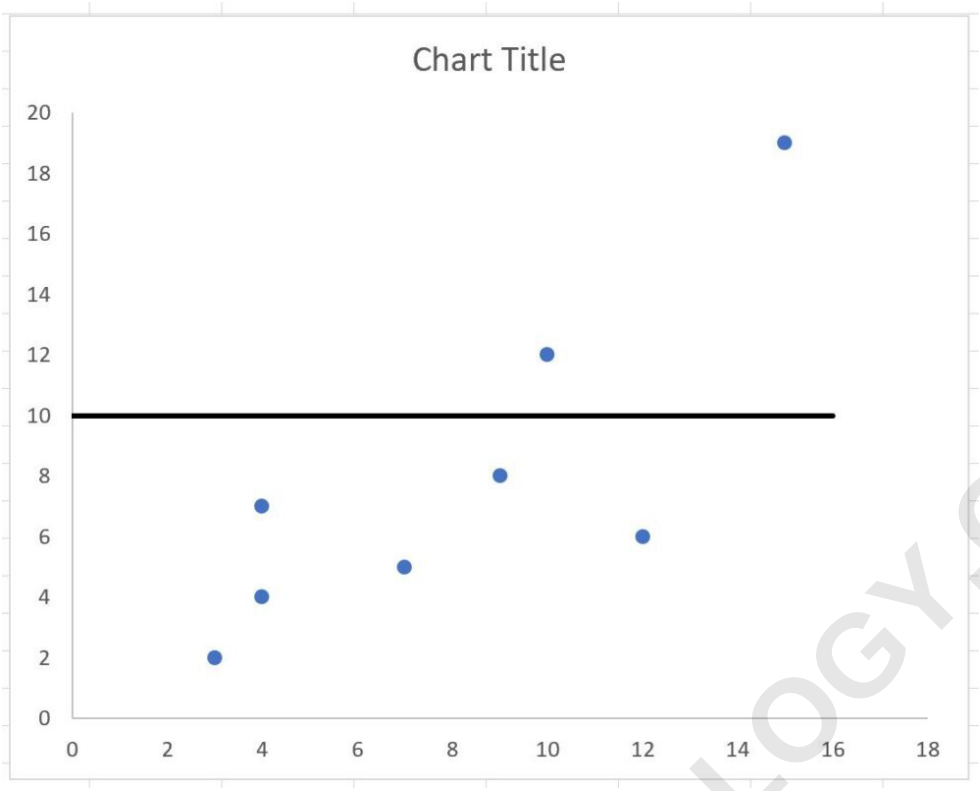


Next, we must remove the distracting markers at the endpoints of the line. Click the **Marker** icon (the triangle/square). Under Marker Options:

Click **None** to hide the markers.



The following clean horizontal line will automatically be added to the chart, precisely positioned at the mean Y value:



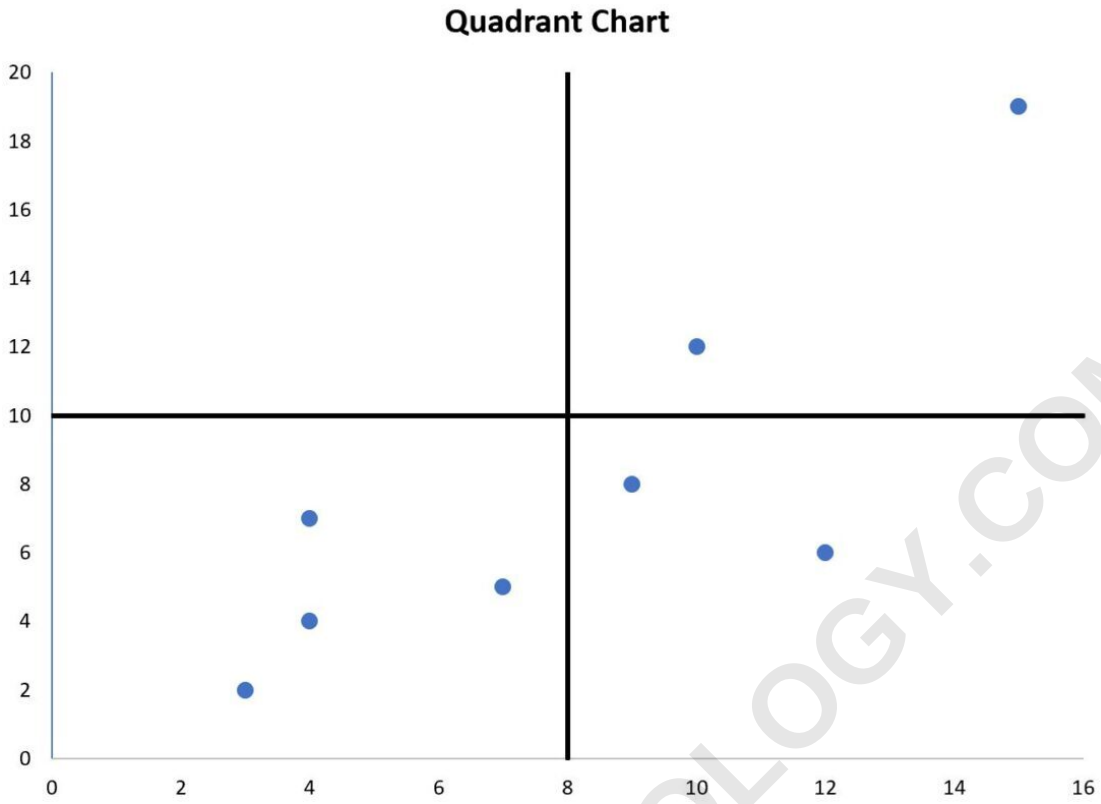
Step 7: Add and Format the Vertical Quadrant Line

The final step in constructing the quadrant chart is to introduce the vertical dividing line, which represents the X-axis threshold. This process is a direct repetition of Steps 5 and 6, but utilizing the calculated data for the vertical series.

Repeat the exact same process to add the vertical line to the chart:

Use the **Select Data** dialog box to **Add** a third series.
Define the **Series X Values** using the constant X average cells (e.g., B14:B15).
Define the **Series Y Values** using the minimum and maximum Y range cells (e.g., C14:C15).
Format this series by selecting **Solid line** (Black color) and setting the **Marker** option to **None**.

The result will be the following completed quadrant chart:



There are now four distinct quadrants in the chart, centered perfectly at the intersection of the mean X and mean Y values. Each point in the chart falls in one of the four quadrants, providing immediate visual interpretation based on the defined thresholds.

Conclusion: Analyzing and Customizing the Visualization

The ability to correctly layer multiple data series (the base data and the reference lines) on a single scatter plot is essential for creating advanced visualizations in Excel. This quadrant chart structure allows for rapid categorization: data points in the top-right quadrant score high on both X and Y metrics, while those in the bottom-left score low on both.

For further enhancement, consider adding data labels to identify individual points, or adjust the colors of the markers to group related items. Mastering this technique is a foundational step toward more sophisticated strategic reporting and business intelligence within Excel.

The following tutorials explain how to create other common visualizations in Excel: