

foreword by David Blatner

# InDesign Type

Professional Typography  
with Adobe InDesign CC

FOURTH EDITION

Nigel French

Sample pages

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# Foreword

You're holding one of the most important InDesign books on the planet. That might sound audacious, but your ability to set type well in InDesign is a critical part of whether your work will be successful. After all, if you don't understand the fundamentals of professional typography, and how to apply them using the tools in InDesign, you're doomed to creating "blah" design. And no one wants to make blah design.

The good news is that design—and especially the design of text, called typography—is something that anyone can learn. It involves two steps: developing the *feeling*, and learning *how to* make type better. Having "the eye" (the feeling for type) leads to misery if you don't know how to handle the tools to change it. And understanding the software is meaningless if you don't know what you're looking for.

Fortunately, I'm pleased to say that this book can help you do both. I've known Nigel French for over a decade, and I can tell you that he is one of the top typography trainers in the world, specifically because he understands—and can communicate—the "feeling" and the "how-to."

In this new edition of Nigel's book, he delves even deeper and stretches even further into making type beautiful, for both print and interactive design. You'll enjoy reading it and learning from it.

Adobe InDesign is the industry's best tool for setting type in short and long documents. The more you know about InDesign, the more fun it is to use it, especially when you have a good teacher like Nigel.

—David Blatner  
co-host, [InDesignSecrets.com](http://InDesignSecrets.com)  
founder, *InDesign Magazine* and  
the InDesign Conference

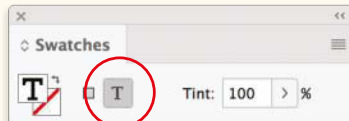
## *Chapter 3*

# Type Choices

This chapter looks at how and why to choose type and InDesign's basic character formatting options. Selecting a typeface and its treatment for a particular task is simple. Deceptively so. Your choice of typeface, its style and point size, and any casing options all contribute to — or detract from — the readability of your text. They should be conscious, informed choices. Discussing these options, we'll follow the order determined by the InDesign interface, an order that both reflects the logic of predigital typesetting and sets the agenda for how we work today. But we'll also look beyond the buttons and menus to discuss the historical precedents and time-honored conventions that are attached to such options.

### Formatting Affects Text

As well as selecting a range of text, you can also select text on a frame-by-frame basis. This is useful if you want to apply the same formatting to all the text in a frame or multiple frames. With a text frame selected, choose the Formatting Affects Text icon on the Swatches panel or the bottom of the Tools panel. You can also press J to toggle back and forth between this and the default option, Formatting Affects Container. This approach lets you evaluate changes without the visual distraction of the text selection color. Note that you will need to apply the formatting through the Character panel, because the Control panel does not show text formatting options when a frame is selected with the Selection tool.



## Text Selection Methods

Before we can format type, we must first select it. Here's a list of shortcuts for selecting text and moving within stories:

- Select one word: Double-click word
- Select one line: Triple-click line (depending on Text preferences setting)
- Select to beginning of paragraph: Cmd+Shift+Up Arrow (Ctrl+Shift+Up Arrow)
- Select to end of paragraph: Cmd+Shift+Down Arrow (Ctrl+Shift+Down Arrow)
- Delete one word to left of cursor: Cmd+Delete (Ctrl+Backspace)
- Delete one word to right of cursor: Cmd+Fn+Delete (Ctrl+Delete)
- Move to start or end of story: Cmd+Fn+Left Arrow or Right Arrow (Ctrl+Home or End)
- Select from the point of the cursor to the start or end of story: Cmd+Shift+Home or End (Ctrl+Shift+Home or End)
- Move to beginning of line: Fn+Left Arrow (Ctrl+Up Arrow)
- Move to end of line: Fn+Right Arrow (Ctrl+Down Arrow)
- Move one word to the right: Cmd+Right Arrow (Ctrl+Right Arrow)
- Move one word to the left: Cmd+Left Arrow (Ctrl+Left Arrow)
- Move to beginning of next paragraph: Cmd+Down Arrow (Ctrl+Down Arrow)
- Move to beginning of previous paragraph: Cmd+Up Arrow (Ctrl+Up Arrow)

Unfortunately, there's no way of selecting text one sentence at a time.

## Basic Character Formats

This section looks at the basic character-level options of the Control panel.

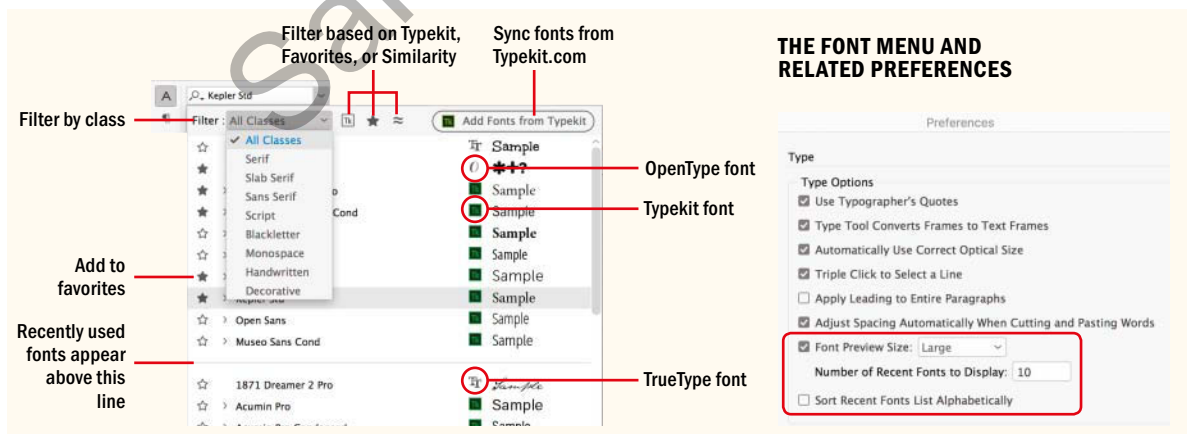
### Font

To change the font of a selected range of text, use the Font field on the Control panel. To jump to the Font field when character formats are active, press **Cmd+6** (Ctrl+6), or just click in the Font field. From there, either click the **x** to clear the search field or select the existing font name and type over it the first few letters of the font you're after. You can also click the magnifying glass icon in the Font field to set the search preference to either **Search Entire Font Name** or **Search First Word Only**. This changes the results you get when you start typing a font name.

To move through the fonts on your menu, applying them to your selected text, press the **Up** or **Down** arrow.

You can change the size of the font previews (or turn them off completely) in Type preferences. The preview is nothing more than the word “Sample” rendered in the particular font. It's not especially useful. Type preferences is also where you can choose the number of recent fonts to display and whether to sort them alphabetically. Recently used fonts are displayed at the top of your Font menu—a list that stays active, even after you quit the program.

**NOTE:** These options are found both on the character formats of the Control panel and in the Character panel. It's a matter of preference which you choose to use. I prefer the Control panel, and the figures in this chapter reflect that choice.



### Font Management


You can never be too rich or too thin or have too many fonts. To use that font collection effectively, however, you're going to need some organization. So as your font collection grows, you may want to invest in a font management utility. On the Mac, Font Book, which comes with macOS, lets you test, preview, and organize your fonts. You can create customized collections, as well as organize—and activate—your fonts by style, project, or client.

If you need more control, Suitcase Fusion, from Extensis ([extensis.com](http://extensis.com)), automatically activates your fonts in Creative Cloud apps, provides tools to fix common font problems, and offers integration with font services like Typekit and Google Fonts. FontAgent Pro, from Insider Software ([insidersoftware.com](http://insidersoftware.com)), and FontExplorer X, from Monotype ([fontexplorerx.com](http://fontexplorerx.com)), offer a similar range of features at the same price, which at the time of this writing is around \$100.


The font menus of designers can be long and a time-suck to use, so it's useful that InDesign provides a number of time-saving filters. As well as the ability to filter the font list by style—Serif, Sans Serif, Script, etc.—you can also filter by Typekit fonts, by “favorites” that you have starred, and by similarity to your currently selected font.

The Font menu is organized by language. After the fonts with western character sets, you will see a list of Japanese fonts, traditional Chinese fonts, simplified Chinese fonts, and Korean fonts. Following these are Arabic fonts and Hebrew fonts.

The following icons are used to indicate different kinds of fonts:

 OpenType

 Typekit (these too are OpenType but are “synced” and the actual font files stored in a hidden folder on your computer)

 TrueType

 Type 1

Sometimes fonts, usually free fonts of dubious provenance, are prone to errors. This is not to besmirch free fonts—there are many good ones out there—but rather a commonsense reminder that you get what you pay for. If you plan on using a free font in your layout, make sure to road-test it before the project deadline.

OpenType is the font file format preferred by most graphics professionals. A single compact file contains both the printer outlines and the bitmap screen information. The printer outlines in an OpenType font can be in either PostScript format or TrueType format. Those with PostScript outlines have the .OTF extension, while those with TrueType outlines have the .TTF extension. OpenType fonts are cross-platform compatible, and offer the potential of up to 65,000 glyphs in one font. In reality, many have the same 228 glyphs you'd find in a Type 1 PostScript font. OpenType fonts may have either *Std* or *Pro* appended to their name. Std means the font contains the standard range of Latin characters. Pro means that the font contains additional characters for working with other languages, as well as such typographic niceties as real small caps, extra ligatures, and different numbering styles.

## Handling Missing Fonts

Sometimes when you open an InDesign document, especially a document created by someone else, you see an alert that fonts are missing. If the document contains unsynced Typekit fonts, the Find Font dialog appears, giving you option to sync those fonts. Assuming you have an internet connection, have a Creative Cloud subscription, and have not reached the maximum number of fonts you can sync from Typekit, after a short pause the fonts will be synced.

Missing fonts are indicated in your layout with pink highlighting; they are listed on your font menu in square brackets. Ideally, you can install the correct fonts. If this isn't practical, you can choose **Type > Find Font** to replace the missing fonts with fonts you have installed.

Select **Redefine Style When Changing All** to ensure that paragraph and character styles will be redefined to use the new font — assuming, that is, that styles have been used. If you don't use this option, you'll end up changing the font on your pages, but it will linger inside the style definition and likely pop up when you least expect it.

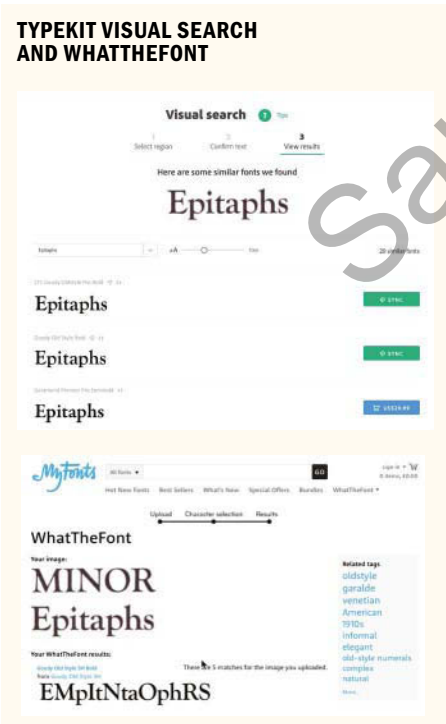
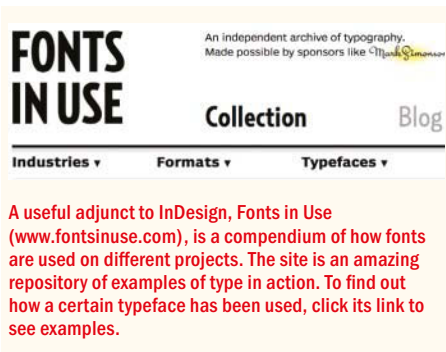
To avoid missing fonts when you pass your job on to someone else — or just move it from one machine to another — make sure the project is packaged. Choose **File > Package**, click the **Package** button, and then select the **Copy Fonts** check box (as well as the **Copy Linked Graphics** box) to have InDesign collect the fonts in a folder inside the project folder. Note that Typekit fonts can't be packaged, however. If you're passing on the document to colleagues, they too must have a Creative Cloud subscription so that the fonts can be synced. Chinese, Japanese, and Korean fonts (CJK) can't be packaged either.

**NOTE:** The pink highlighting can be turned off in your preferences. Choose **Preferences > Composition > Highlight Substituted Fonts**.

**TIP:** Find Font is not limited to replacing missing fonts. It's also the quickest way to change one font to another throughout your document — just make sure to have **Redefine Style** selected when you do so.

### Font Styles

Having a choice of different type styles — like bold or italic, for instance — within the same typeface family lets you indicate hierarchy and emphasis, while at the same time maintaining stylistic continuity. InDesign won't allow you to apply "faux" bold or italic font styles; there's no **B** or **I** button to make the text heavier or slanted. Both styles can be faked in other ways, but you have to be desperate to want to do so. Instead, choose the italic or bold weights of that typeface from the **Font Style** menu. You can also use the shortcuts **Cmd+Shift+I** (**Ctrl+ Shift+I**) or **Cmd+Shift+B** (**Ctrl+Shift+B**) — if a font doesn't have a bold or italic version, the text doesn't change.



## Normal/Regular/Roman

Numerous terms are used to describe the styles within a typeface. Type that doesn't slant is referred to as *roman*. This "normal" style is usually called *regular*, but in certain typefaces may be called *book* or *medium*. The terms *italic* and *oblique* both refer to slanted type, the latter employed in some sans serif typefaces. Terms like *light*, *semibold*, *bold*, or *black* refer to the font weight and are self-explanatory; other, lesser-used terms to describe font weight are *heavy* and *extra bold*. The terms *condensed* and *extended* refer to character width.

The most important type choice you'll make is your body text, which will be in the "normal" style. Body text makes up most of any document, so the look of the body text is of paramount importance. Here are some things to consider:

- **Your body type should be trustworthy and unobtrusive.** These are qualities best served by typefaces with conventional letterforms. Novelty slows comprehension; letters with excessive ornamentation or quirky design elements force the reader to process what they are looking at first—"Wow, look at that cute g"—before taking in the message.
- **Body text should be easily readable at small sizes.** Typically this means choosing a typeface with a tall x-height. A tall x-height makes it easier to distinguish between similar lowercase letters, like "a," "c," and "e."
- **Although it's not a cast-iron rule, serif fonts are more common for body text in print.** Pick up any book, newspaper, or magazine and there's a more than 50 percent chance it has

## Identifying Type

See a typeface that you like but don't know its name? There are several online services that help you play font detective.

**Visual Search** from Typekit uses Adobe Sensei's machine-learning technology to identify a font and suggest similar typefaces on Typekit. You upload a photo of lettering or type, and Visual Search will return a list of similar typefaces on Typekit.

**WhatTheFont** (from MyFonts.com) and the **Font Matcherator** (from Fontspring.com) work in a similar way.

**Identifont** (www.identifont.com) takes a different approach, drilling down to the font's identity by asking a series of questions, such as: Does the font have serifs? What style is the uppercase Q tail?

a serif font for the body text. In screen publications, body text can be sans serif or serif. Sans serifs were once preferred for screen type because they look crisper on low-resolution displays. Screens have come a long way in recent years, however, and today serif fonts look equally good.

- **Research the attributes and connotations of prospective typefaces.** Does the family have italic and bold variations, and are there enough weights and styles for the job in hand? Is the typeface designed for print or screen? Is its history congruent with the subject matter of the text? If you're in doubt, a quick browser search will give you some background information about the typeface.
- **As well as identifying the physical characteristics of the typeface, consider too any baggage that comes with it.** Default choices like Times or, sadly these days, Minion can connote laziness. Which is not to say that you can't create great-looking designs with these fonts, but rather that you're starting on the back foot and you'll have to work harder to make them look like conscious and informed choices.

### Italics

Italic type styles—so named because they evolved in Italy—are designed to complement their roman siblings. Most fonts come with a matching italic. The company that developed InDesign's predecessor, PageMaker, took the name Aldus after Aldus Manutius (c. 1449–1515), a Venetian printer who was the first to use italic type in the early 16th century.

Italics are separate fonts in their own right, not just slanted versions of the roman. When they were first used, they were considered distinct from the roman forms. Over time, printers began pairing italics with romans of the same weight and x-height, but italics retain their identity through narrower proportions and unique letterforms.

Italics have the following uses:

- Emphasis.
- Foreign language words or phrases, except those words that are in such common usage as to not require distinction; for example, cliché, elite, genre. Such conventions shift over time, so check the dictionary for clarification.

### Variable Fonts

This exciting new font format allows you to customize styles within a typeface design—effectively giving you a whole font super family in a single file. You can change weight, width, and slant, as well as optically size. For veterans who remember multiple master fonts, it's like that, only better. At the time of this writing there's no support for variable fonts in InDesign or Typekit, but that's bound to change, as they are now available in Adobe Photoshop and Illustrator. You can view a demo video here: <https://youtu.be/bD6BSjl-xfw>.



Using the Weight and Width sliders to adjust the style of a Variable font in Illustrator

## ITALICS

The image shows two pairs of lowercase letters: 'a' and 'ff'. In the first pair, the 'a' is in a true italic font (slanted and with a different shape) and the 'ff' is in a regular roman font. In the second pair, both the 'a' and 'ff' are in a slanted roman font, which looks like the italicized version of the regular font but lacks the true italic's unique letterforms.

There's more to italics than just a slant — the letterforms are completely different from the roman. Below, compare the difference between real italics and slanted roman.

*when a long train of abuses and usurpations, pursuing invariably the same Object evinces a design to reduce them under absolute Despotism, it is th*

*when a long train of abuses and usurpations, pursuing invariably the sa Object evinces a design to reduce them under absolute Despotism, it is their*

- The titles of films, books, magazines, or works of art.
- In written dialogue to indicate that the conversation is thought, rather than said, by the character.

Avoid setting long passages in italics. The calligraphic flow of italics makes the type look hurried; or perhaps the characters, being more decorative, attract too much attention. If they're overused, the uniqueness of italics is lost.

When working with serif typefaces, consider increasing the size of the italics by about half a point (for ease and consistency this should be incorporated into a character style—see Chapter 15). This is an optical issue—with the roman and italic at the same size, the italics often *look* smaller—though of course this depends on the typeface.

If you're using a typeface without an italic and you really need an italic version for emphasis, but you're wedded to that particular typeface, you can, in a pinch, fake italics by using the slant option to give the type an angle of 12 degrees. Don't say I didn't warn you—fake italics look cheesy.

It's common for sans serif families to have an oblique, rather than italic, style. Oblique types are slanted versions of the roman characters rather than separately drawn letter forms. If you're working with such a typeface family, consider using bold rather than italic to give emphasis, as obliques lack the grace and calligraphic quality of true italics.

When using italics (or any other method) for emphasis, any punctuation that follows should be in the same style.

**Bold**

Bold weights are typically applied to headings and subheads to establish hierarchy. It's also common in newspapers and magazines to distinguish supporting text like sidebars, captions, and pull quotes by using a bold or semibold weight.

In larger typeface families, there may be relative weights of boldface, with names like semibold, black, extra bold, and super. Given the option of several weights within the same family, it's preferable to differentiate by two weights to achieve the desired contrast. For example, pair regular with bold, or light with semibold; a regular paired with a semibold will look too similar and will not provide sufficient contrast.

**COMBINING DIFFERENT WEIGHTS WITHIN A TYPEFACE FAMILY**

The image shows the letters 'A' and 'g' in a regular weight, followed by 'Ag Ag' in a bold weight. The bold letters are significantly larger and thicker than the regular letters.

Regular with Bold

The image shows the letters 'A' and 'g' in a light weight, followed by 'Ag Ag' in a semibold weight. The semibold letters are slightly larger and thicker than the light letters.

Light with Semibold

The image shows the letters 'A' and 'g' in a regular weight, followed by 'Ag Ag' in a semibold weight. The semibold letters are slightly larger and thicker than the regular letters.

Regular with Semibold.

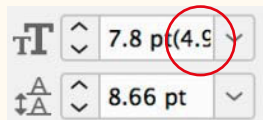
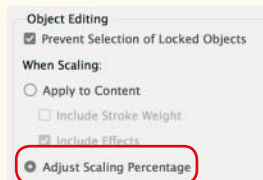
In the top two options the weights are clearly differentiated; in the last, they are too similar.



## Font Size in Parentheses

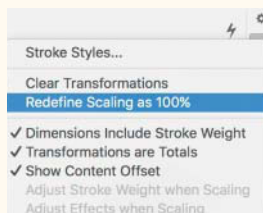
By default, if you scale a frame, the text inside is also scaled. If you double the size of a text frame, the text size also doubles, so 20-point text increases to 40 points, for example.

There's an ill-advised preference that changes this behavior. If you choose **Adjust Scaling Percentage**, the **Font Size** field displays both the original and the scaled size of the text, such as "20 pt (40)."



The purpose of this option is so users can monitor scale changes to frames — potentially useful if you have to revert a frame and its text to its original size. In practice, however, it just confuses people.

If you inherit a document with font sizes in parentheses, reset this preference to **Apply to Content**. To see the "real" sizes of your type, select the frames, then choose **Redefine Scaling as 100%** from the **Control** panel menu. Choosing this option doesn't change the appearance of the scaled frame.



## Common Text Sizes in Print

**Body text** or **body copy** is the type (typically in sizes between 8 and 12 points) that makes up the majority of a book or article and carries the bulk of the message. Typefaces designed for such a purpose — referred to as text typefaces — need to have letterforms that are effortlessly recognizable and so tend to have open counters, large x-heights, rhythmic and repetitive shapes, and a medium weight.

When choosing the size of your body text, you can probably go smaller than you think. Text that is too large looks amateurish and clunky. While 12-point type is InDesign's default type size — and looks about right on screen — it will probably look too big in print. Start out with 10 point, then increase or decrease the size as necessary according to the characteristics of the font and the needs of your audience.

**Display type** is the big type (typically 18 points and above) whose primary purpose is to be seen; it's the bait that lures the reader. Display type is designed to grab attention and relies on a unique, sometimes showy form to announce and amplify the message of the text. Text type can function as display type by making it bigger, but it seldom works the other way around. It's also worth mentioning that while size usually indicates the type's intent, this is not always the case. For example, an understated headline can sometimes attract attention by being unexpected.

**Subheads** allow a story to be broken down into bite-size chunks that are more visually enticing than a mass of undifferentiated paragraphs. They provide visual relief and interest, as well as acting as signposts throughout a book or article. Subheads may be the same size as the body text but be distinguished by a different font or weight, or they may be a point or two bigger.

**Captions** help interpret an image or figure and are usually set a point or two smaller than the body text. In our busy world, it's the captions that the tentative reader reads before engaging fully with the body copy or moving on.

## Casing

Whereas capital letters evolved from the Romans, it wasn't until the end of the 8th century that anything like lowercase letters were used. Credit for their invention goes to Alcuin of York (c. 735–804), Charlemagne's leading adviser on ecclesiastical and

educational affairs, who oversaw the standardization of ecclesiastical texts. With the invention of the printing press in Europe around 1450 (though it existed earlier in both China and Korea), the terms *uppercase* and *lowercase* were adopted from the wooden type cases used to hold the movable type. The top case was for the majuscules, the bottom case for the minuscules. Today, most fonts come with both uppercase and lowercase letters, but some are *unicase*, or *unicameral*. Trajan, by Carol Twombly (1959–), for example, comes only in uppercase, while Bayer Universal, by Herbert Bayer (1900–1985), comes only in lowercase—in fact, Bayer, a leading figure in the Bauhaus, advanced the idea of doing away with uppercase letters altogether.

### All Caps

Continuous text set in unicaser can be challenging to read. Text in all caps, for example, is less readable than text in upper- and lowercase because the word shapes all look alike and are differentiated only by their length. We recognize words as shapes—it's the descenders and ascenders of lowercase text that allow us to instantly identify letters. Also, text in all caps tends to look disproportionately large when set among upper- and lowercase text; hence the need for small caps. Just as shouting doesn't make your message any clearer, setting text in all caps doesn't make your message any more compelling. At the other extreme, continuous text set all in lowercase makes it harder for the reader to distinguish one sentence from another and is really only appropriate if you are k.d. lang, bell hooks, or e. e. cummings.

Nonetheless, all caps can be effective in headlines and subheads. Because there are no descenders, be sure to tighten the leading (line spacing). With a serif font in all caps, you may want to loosen the letterspacing for a sophisticated and understated look; for an all-caps sans serif font at display sizes, consider tightening the letterspacing for a denser, more solid look.

#### MONOCASED TYPEFACES

## THE GREATEST SHOW ON EARTH

Trajan Pro

graphic design  
architecture  
interior design

P22 Bayer Universal

What light through yonder window breaks?



WHAT LIGHT THROUGH YONDER WINDOW BREAKS?



#### WORD SHAPES

The shapes made by the ascenders and descenders of the upper- and lowercase type make the text more identifiable, whereas text in all caps makes word shapes that are basically identical.

*“To remain nameless and without specific appreciation, yet to have been of service to a valuable work and to the small number of visually sensitive readers—this, as a rule, is the only compensation for the long, and indeed never-ending, indenture of the typographer.”*

—Jan Tschichold (1902–1974), from  
The Form of the Book

If the text has been typed in lowercase or sentence case, you can easily convert it to all caps by using the shortcut Cmd+Shift+K (Ctrl+Shift+K). InDesign doesn’t replace the characters themselves but changes how they appear and print. As far as the spell checker or Find/Change are concerned, the text remains as it was. Alternatively, you can choose Type > Change Case, which does change the text. Unfortunately, the Change Case options are very easily tripped up. For example, Title Case capitalizes the first character of each word in the selection, even prepositions and articles. Converting text that has been typed in all caps to sentence casing is even more hit-and-miss: InDesign interprets any period, question mark, or exclamation point as the end of a sentence. This causes unexpected case changes when these characters are used in other ways, as in abbreviations, file names, or URLs.

House styles vary when it comes to the casing of chapter headings, headlines, and subheads. *Up style*, in which every major word is capitalized, is the most common approach. With *down style*, only the initial cap and proper nouns are capitalized. Down style has the obvious editorial appeal that no one has to agonize over whether a word is a “major” word and thus needs to be capitalized. Another advantage is that since more words appear in lowercase, there are more familiar word shapes. (This book uses up style heads due to Peachpit’s style guide.) A third approach, commonly used for product names, is *camelcase*, in which compound words or phrases are written without spaces and the first letter of each compound is capped; for example, PlayStation, PageMaker, and of course ... InDesign.

If I may gripe for a moment, I don’t know why in 2018 we can’t include title casing as part of a paragraph style or character style. If memory serves, Ventura Publisher (may it rest in peace) had this option circa 1988. Take this a step further and you could exclude

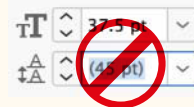
**ONE SMALL STEP FOR MAN;  
ONE GIANT LEAP FOR MANKIND**

**ONE SMALL STEP FOR MAN;  
ONE GIANT LEAP FOR MANKIND**

#### ALL CAPS LEADING

⚠ Auto Leading results in the lines of the headline being too far apart. The height of the space between the lines (1) is significantly bigger than the width of the space between the words (2).

⚠ The type is set solid, i.e., the leading is the same as the point size. This creates a cohesive look for the headline, where the leading is only slightly bigger than the word space.



articles and prepositions for down-style casing. This would make the styling of headlines and subheads faster and more consistent. Of course, it wouldn't be foolproof, but it would cut down on the drudgework. As an InDesign user, you make feature requests at the InDesign UserVoice page: <https://indesign.uservoice.com>.

### Small Caps

Small caps are only as tall as the x-height and so do not, like regular caps, overwhelm the upper- and lowercase type they appear alongside. Small caps are mainly associated with serif typefaces and are nearly always roman. Small caps have the following uses:

- Acronyms, initialisms, and historical designations such as BC and AD—preferably without periods, though house styles differ
- To transition from a drop cap to the regular body text
- For abbreviations like AM and PM—with no letter spaces or periods, though it's more contemporary to use lowercase: 3pm, 7pm, and so on
- The names of speakers in plays

If you're using a font that lacks real small cap characters, your small caps will be regular caps scaled to the percentage specified in the Advanced Type preferences. Because the weight of their strokes is reduced along with their height, these software-generated or “fake” small caps appear too light when set alongside other text at the same size. My advice is to avoid them. There are other ways to give emphasis.

Real small caps, on the other hand, are distinct characters that have been designed with their weights the same as the full-size text.

Small caps imply that the first character of the word is going to be a regular cap and therefore bigger than the rest. This needn't be so. Choose OpenType All Small Caps to have all characters the same size—at the height of the x-height.

### Superscript (Superior) and Subscript (Inferior)

Superscript is typically used for ordinals in numbers or for footnotes. Subscript is used for scientific notation. In Advanced Type preferences, you can change the size of superscripts and subscripts—expressed as a percentage of the full-size capitals—as well as their position relative to the baseline. My preferred settings

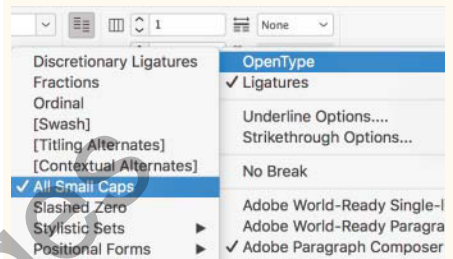
#### SMALL CAPS

## NATIONAL DISGRACE

“Fake” small caps at 70% of the full capitals. Notice the lighter stroke weight.

## NATIONAL DISGRACE

OpenType small caps



## HISTORIC PROPORTIONS

Normal Small Caps

## HISTORIC PROPORTIONS

OpenType All Small Caps

### Glyph Positioning

With display type in all caps, the positioning of hyphens, dashes, and parentheses may require adjustment. Hyphens are centered on the x-height, which is appropriate for lowercase letters but too low for capitals. Hyphens, dashes, and parentheses may need to be adjusted with baseline shift.

Among the many benefits of OpenType fonts—and InDesign's support for them—is that this glyph positioning happens automatically. Some OpenType fonts adjust the position (or even shape/size) of some glyphs in all-caps situations. If you format an OpenType font as all caps, the surrounding hyphens, dashes, parentheses, braces, and brackets all shift vertically. Note, however, that this happens only when you choose All Caps character formats, not when you key in text with Caps Lock on.

### SUPERSCRIP, SUBSCRIPT, SUPERIOR, AND INFERIOR

April 1<sup>st</sup> Superscript

April 1<sup>st</sup> OpenType Ordinal

H<sub>2</sub>O Subscript (position 20%)

H<sub>2</sub>O OpenType Inferior

### SUPERIOR AND INFERIOR NUMBERS

Note the differing baseline positions.

	<small>numerator</small>		<small>superior</small>	
2	2	2	2	2
<small>lining number</small>		<small>denominator</small>		<small>inferior</small>

complicit

complicit

### UNDERLINING

In the top example, using default settings, the underline slices through descender to create an ugly result. This can be somewhat improved by adjusting the weight and offset of the underline as well as adding a background color stroke to the outside of the text.

are 60% for the size of both. The superscript position I leave unchanged, but I change the subscript position to 20%.

As with fake small caps, the problem is that you're reducing not just the vertical scale but also the horizontal scale. The result is that the characters look too light and too narrow when set alongside full-size characters.

With OpenType faces, rather than use the Superscript and Subscript buttons on the Control panel, choose Superscript/Superior or Subscript/Inferior from the OpenType flyout menu. In most cases, ordinals and superscript/superior are the same thing. These are distinct glyphs with a stroke weight the same as that of the upper- and lowercase text. Superior figures are used for footnotes and formulas. They are the same as numerators used in diagonal fractions, but with a higher baseline. Inferior figures sit below the baseline and are used in chemical formulas. They are the same as denominators used in diagonal fractions but with a lower baseline.

### Underline

In days of yore, when records came on vinyl and people typed on machines called *typewriters*, underlining was *de rigueur* for adding emphasis—but that was only because typewriters couldn't do it any other way. Underlining, as every type primer will tell you, should never be used for emphasis. The underline is too heavy, collides with the descenders, and insists on applying itself to the spaces in the selection. On this last point, if you want the underlines to break at spaces in the text, you can use Find/Change to find a space in the selection with Underline turned on, then replace it with a space with Underline turned off. But unless your design unequivocally calls for this treatment, you're better off choosing another way to give emphasis.

With the web, underlining got a new lease on life when it was adopted as the conventional way to indicate hyperlinks. If you're using underlining for this purpose, be sure to change the weight, the offset, and possibly the color of the line in Underline Options. They will still look ugly, but less so.

Underlines work best when they don't look like underlines. By adjusting the weight, offset, and color of the underline, it's possible to apply "highlighting" as a character style. (See Chapter 15, "Styles," for more on creating character styles.) Select the Overprint

Fill check box if you're applying highlighting to any color of text other than black, to avoid the need for trapping in professional print projects.

### Strikethrough

Strikethrough is used to indicate which text will be deleted as a document moves through revision cycles. If you tweak the Strikethrough Options, the strikethrough could potentially be used as a second underline.

### Baseline Shift

Baseline shift — Option+Shift+Up Arrow or Down Arrow (Alt+Shift+Up Arrow or Down Arrow) — is used to vertically shift the selected characters relative to the baseline of the type. It should not be used to adjust spacing between paragraphs, which should be controlled by Space Before and Space After.

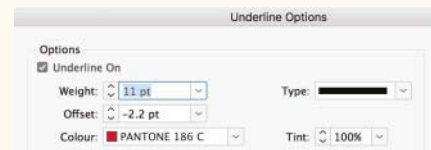
Baseline shift can be used for the following:

- Adjusting the position of bullets, ornaments, inline graphics, and such symbols as @, \$, °, ©, ™
- Adjusting the position of a decorative drop cap
- Manual fractions (although it's preferable to use a fraction script or, better still, an OpenType Pro font with real fractions)
- Monetary amounts where the size of the currency symbol is reduced
- Mathematical or chemical formulas
- Adjusting the position of parentheses, braces, and brackets — all of which center on the lowercase x-height, relative to the type they enclose. When used with all caps, they should center on the cap height. (OpenType fonts make using baseline shift unnecessary because of their ability to glyph shift — that is, adjust the position of certain characters, like opening and closing parentheses, according to whether they are preceded or followed by an upper- or lowercase character; see “Glyph Positioning.”)
- Creating type that looks like the thing it is describing
- Adjusting the baseline of a type on a path, particularly around a circle

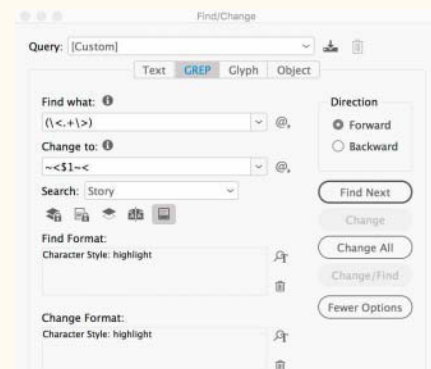
**Climate change** is caused by factors such as biotic processes, variations in solar radiation received by Earth, plate tectonics, and volcanic eruptions. Certain human activities have been identified as primary causes of ongoing climate change, often referred to as global warming.

### UNDERLINING APPLIED AS A CHARACTER STYLE TO INDICATE HYPERLINKS

text **highlighted** with an underline



Underlining applied as a highlight



A shortcoming of using underlining in this way is that the highlight doesn't extend beyond the text on the sides. While there's no way to specify padding either side in Underline Options, it can be achieved with GREP. The GREP expression above finds any number of characters in the Highlight character style [.+] between the start of a word [\<] and the end of a word [\>], and adds a thin space before [~<], and after [~>] the found text [\$1].

### SOME USES OF BASELINE SHIFT

(415) (415)

Parentheses shifted up around telephone area code, right

\$10.99 \$10<sup>99</sup>

OpenType Superior and Baseline Shift applied, right

CAROUSEL

Interpreting a word

C all me Ishmae  
precisely—hav  
nothing partic  
would sail about a li

C all me Ishmae  
precisely—ha  
nothing parti  
would sail about a l

Drop Cap baseline shifted up to avoid collision

BASELINE SHIFT

BASELINE SHIFT

Shifting type on a path to the outside of the circle

**NOTE:** If you're working with equations and there are just a few, you can use a typeface like Mathematical Pi in conjunction with baseline shift and tabs. If the document contains many equations, consider a third-party plug-in like MathTools, available from <https://movemen.com>. The InDesignSecrets website has a discussion of different approaches to formatting equations: <http://indesignsecrets.com/typesetting-math-in-indesign.php>.

## Condensed and Extended Type

The Character Formatting view of the Control panel has controls for changing the horizontal and vertical scale of your type. Most of the time these controls are best avoided. Choose real condensed or real expanded typefaces rather than try to fake them by adjusting the horizontal or vertical scale. Faking a condensed typeface (squeezing the horizontal scale) or an expanded typeface (stretching the horizontal scale) makes the character shapes look puny and the overall effect amateurish.

Condensed type is useful when you have a lot of text to fit into a finite space; extended type can fill a defined space with a relatively small amount of text.

Condensed faces can make for more impactful headlines. Because the characters occupy less horizontal space than a regular typeface, you can increase the type size and occupy more vertical space.

Condensed faces are also useful for tabular material where the space inside each cell is cramped.

Extended faces may be used for display type, and are more likely to be sans serif—like Helvetica Neue Expanded or Univers Extended.

Horizontal or vertical scale controls are sometimes useful when using picture fonts, like Zapf Dingbats or Wingdings, so that you can turn circular bullets into ovals, turn squares into rectangles, or create taller triangles or longer arrows.

## Typekit

Typekit is Adobe's font subscription service that offers a curated selection of high-quality fonts from reputable foundries. To add Typekit fonts via Typekit.com, select Add Fonts from Typekit from the Font menu or Type menu. The browser interface helps you make informed type choices. You can specify the class of typeface you're looking for as well as its properties and drill down to a short list of candidates. Once synced, the fonts show up on your font menu.

Not all Typekit fonts are syncable. Some are web fonts and some require purchase, but a good (and growing) selection of fonts is available as part of your Creative Cloud subscription.

# Man Bites Dog

Franklin Gothic URW Demi 53 pt

# Man Bites Dog

Franklin Gothic URW Condensed Demi 62 pt

# Man Bites Dog

Franklin Gothic URW Extra Compressed Demi 100 pt

Condensed and Compressed typefaces can be more impactful within the same horizontal space.

A Typekit font looks and behaves like any other and can be printed as well as embedded in a PDF or fixed-layout EPUB. The one limitation is that they cannot be included as part of a package. The font files themselves are renamed and hidden from the user. This means that if you're using Typekit fonts in an InDesign document that you share with a colleague, they too will need a Creative Cloud subscription to sync the fonts on their machine. But then again, they'd need that subscription just to open your files with the current version of InDesign, so this isn't as much of an obstacle as it might seem. Another issue that gives some users pause is that of archiving. Because you can't package Typekit fonts, you can't store your own complete archive of a project, which means you can't let your Creative Cloud subscription lapse if you want to work with documents that use Typekit fonts in the future.

## Legibility and Readability

The related concepts of legibility and readability determine the effectiveness of your typography. *Legibility* refers to how easily we can recognize a typeface. Specifically, how easy it is to discern the letters and distinguish them from each other—as in an eye exam. Legibility is the responsibility of the typeface designer. The typeface designer crafts the shapes, details, and negative space of

### SQUEEZED VS. CONDENSED

AA AA

Regular left alongside squeezed

Regular alongside real condensed — note how the stroke widths are maintained

### EXTENDED TYPEFACES

**GRILL**

L I V E L O B S T E R

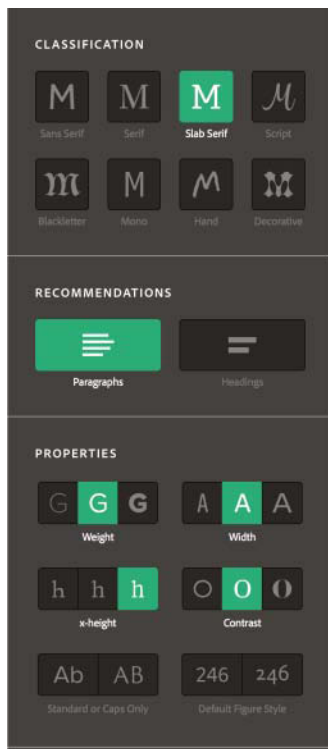
**SEAFOOD**

F R E S H F I S H

Blackoak

**NARCISSIST**

HWT Roman Extended



Typekit filters allow you to search for fonts by class, recommendations, properties, and language support (not shown). In this example, I am searching for a slab serif suitable for body text with a medium weight, standard width, high x-height, and medium contrast.

*“A few hundred years of type and typography have established rules that only a fool would ignore.”*

—Eric Spiekermann

the letterforms, which in turn determine how these letters combine to make words and sentences.

*Readability* refers to the ease with which we comprehend text by recognizing words and phrases as shapes. It is the product of how the type is set and is the responsibility of the typographer. It is the typographer who, guided by typographic rules, chooses the type, its size, leading, color, column width, and so on, to create readable type. This means putting the reader first and leaving your ego behind—or at least confining it to a first draft. The design of your body copy, it is said, should be “invisible.” If no one notices your type, you’re doing a good job.

This might make the designer sound undervalued, but while readers may not notice *good* typography, they will certainly notice *bad*.

This view of designer as self-effacing craftsman in service of the message is not universally held. Part of the appeal of grunge typography, so popular in the early 1990s, was that it celebrated rather than dampened the designer’s subjectivity. The results were, by conventional standards, often unreadable, relying instead on the visual impact of the type to convey the meaning of the text.

Personally, I believe “the rules” of readability are a good starting point. Once learned, they can be upheld or disregarded as you see fit. But as the saying goes: Learn the rules first before you start breaking them. If you feel like making your type “invisible” is taking things too far, then aim for your type to not call too much attention to itself.

Not all typefaces are—or should be—created for readability. Many decorative faces aim to create a mood or make a design statement. Some are deliberately challenging in terms of their readability and are arguably more, not less, legible for that. They exist to grab attention rather than to be read continuously. It’s interesting that type can be legible without necessarily being easily readable.

However, the opposite is not true: Type cannot be readable without first being legible. Sure, you can improve the readability of a hard-to-read typeface, but if it’s illegible, it’s always going to be hard to read.

In most cases, communication comes before style. Readability is our goal, so start with a legible typeface. But there are some twists. For example, not all type is intended to be readable. A cynic might

One morning, when Gregor Samsa woke from troubled dreams, he found himself transformed in his bed into a horrible vermin. He lay on his armour-like back, and if he lifted his head a little he could see his brown belly, slightly domed and divided by arches into stiff sections. The bedding was hardly able to cover it and seemed ready to slide off any moment. His many legs, pitifully thin compared with the size of the rest of him, waved about helplessly as he looked.

Adobe Jenson Pro

One morning, when Gregor Samsa woke from troubled dreams, he found himself transformed in his bed into a horrible vermin. He lay on his armour-like back, and if he lifted his head a little he could see his brown belly, slightly domed and divided by arches into stiff sections. The bedding was hardly able to cover it and seemed ready to slide off any moment. His many legs, pitifully thin compared with the size of the rest of him, waved about helplessly as he looked.

Open Sans Regular

#### READABILITY

The 15th-century (Jenson) versus the twenty-first (Open Sans). Is one more readable than the other?

cite legal small print or terms and conditions text as examples of typography where readability is deliberately compromised. There have also been studies that prove that using ugly fonts in an educational environment can improve cognition — presumably because they are more memorable. I think this is fascinating, but there’s enough ugliness in the world without us adding more.<sup>1</sup>

#### Serif vs. Sans Serif

The conventional wisdom is that in print, serif typefaces are more readable for body text than are sans serif faces. If we buy into this assumption, what’s the reasoning? Perhaps it’s because the serifs function as rails, guiding your eye along the line. Perhaps we perceive serif typefaces as more “human” because the transitions of their strokes resemble calligraphy. Perhaps sans serif typefaces are less readable because the letters are inherently more like each other, it being hard to distinguish between an uppercase *I* and a lowercase *l*, for example.

Or perhaps the explanation is self-fulfilling. We read serif type more easily because we’re more used to reading serif type. We could get used to anything; it just so happens that we’ve been reading serif type for centuries and the habit is second nature.

Sans serif typefaces are the new kids on the block, relatively speaking. They weren’t invented until the early 19th century and weren’t in common usage until much later. They were invented for

*“[...] 90% of graphic designers do not know the basics of setting good text.... I am not sure why [...] maybe because colleges are frightened that students will get bored, maybe because everybody wants to be a pop-star designer they don’t think these things are important — well they are. A plea to young designers — learn the basics, then your work will have the underlying authority to be subversive.”*

—Jonathan Barnbrook  
([www.typographer.org/archive/mag-interview-barnbrook.html](http://www.typographer.org/archive/mag-interview-barnbrook.html))

1. [www.wired.com/2011/01/the-benefit-of-ugly-fonts](http://www.wired.com/2011/01/the-benefit-of-ugly-fonts)

Arial

Times New Roman

Minion Pro

Myriad Pro

Verdana

Georgia

Overexposed

*Brush Script*

Comic Sans

Impact

Papyrus

*Zapfino*

Best avoided

All of these fonts, yes even Comic Sans, have their place. When we talk of bad fonts, it's more down to user error than any inherent failing of the font itself.

Those in the "overexposed" group are venerable typefaces; their only problem is that they have been loved to death. We see them too much; it's time they took a well-deserved vacation so that they can be rediscovered in a few years time and look fresh again.

Those in the "best avoided" group have garnered bad reputations because they tend to stand out on the font menu and have been put to all sorts of uses for which they were never intended.

advertising and are, in general, more forceful and in-your-face than serif typefaces. We're accustomed to seeing them used as display type, where readability is a lesser concern, because headlines and subheads are set in short bursts rather than long passages. In fact, because their letter shapes are simpler, sans serifs may be more legible than their serifs.

In practice, readability is more nuanced than choosing one class of typeface over another. It depends on how the variables of type composition are handled.

In the right hands, there's no reason why a sans serif can't be every bit as readable as a serif typeface. In fact, we're accustomed to reading sans serif typefaces at small sizes, too: for captions, in classified ads, in phone books, in timetables, on business cards, and as body text. In fact, it's often the simplicity of a sans serif that makes it suitable for small text.

To put it another way, it's less about whether the typeface has serifs or not, and more about what you do with that typeface.

### Other Readability Factors

Your choice of font is just one of several factors that work in sync to create readable type. Other factors include but, as they say in legalese, are not limited to:

- Leading (see Chapter 5).
- Column measure (the relationship of type size and column width). There's no "right" size of column measure, as it will depend upon the nature of the text and the type of publication you're working for, but as a rough guide, aim for 45 to 65 characters (including the spaces) per line.
- Alignment (see Chapter 8).
- Margins (see Chapter 17).
- Printing conditions: If the piece will be printed, what kind of paper stock will be used?
- Reading conditions: This is an enormous variable over which you, the designer, have no control. You can't know whether your audience will be reading by candlelight, while standing on a busy commuter train, or while soaking in

**LINE LENGTH**

Bears Ears National Monument is a United States National Monument located in San Juan County in southeastern Utah, established by President Barack Obama by presidential proclamation on December 28, 2016. The monument's original size was 1,351,849 acres, which was reduced to 201,876 acres by President Donald Trump on December 4, 2017.

**Too narrow**

Bears Ears National Monument is a United States National Monument located in San Juan County in southeastern Utah, established by President Barack Obama by presidential proclamation on December 28, 2016. The monument's original size was 1,351,849 acres, which was reduced to 201,876 acres by President Donald Trump on December 4, 2017.

**Acceptable**

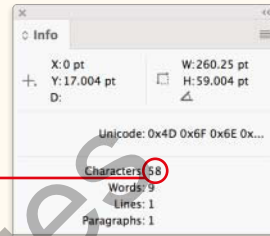
Bears Ears National Monument is a United States National Monument located in San Juan County in southeastern Utah, established by President Barack Obama by presidential proclamation on December 28, 2016. The monument's original size was 1,351,849 acres, which was reduced to 201,876 acres by President Donald Trump on December 4, 2017.

**Too wide**

40

60

90



the bath. Depending on the type of document you're creating, however, you can make an educated guess. For example, if you're designing a bus timetable, you'll want to forgo the challenging grunge typography in favor of a straightforward approach.

- **Color and contrast:** For type to be readable you need contrast between the color of the type and the color of the background. Avoid placing type on a busy pattern, and if you opt for placing type on top of a photograph, be aware that doing so compromises readability. What you gain in return may be worth it, but always opt for a “quiet” part of the image.

**NOTE:** If you're typesetting for a dyslexic audience, consider the Open Dyslexic typeface. Its unique letter shapes are designed to help prevent confusion through flipping and swapping. You can download it for free: [opendyslexic.org](http://opendyslexic.org).

**CONTRAST**

Type over a busy background is rendered unreadable. Positioning the type over a quiet part of the image provides sufficient contrast between text and background.

Finally, to close this chapter, some sobering (and inspiring) words from influential graphic designer David Carson: “Don’t mistake legibility for communication.” Following the rules of readability and legibility will ensure against typographic failure, but it is not a guarantee of typographic success. Just because a piece of type is legible and readable, it doesn’t always follow that people will *want* to read it.

Sample pages