

Calculating Quartiles in Power BI: A Step-by-Step Tutorial

Authored by
Mohammed loot

November 12, 2025

RECOMMENDED CITATION

Mohammed loot (2025). *Calculating Quartiles in Power BI: A Step-by-Step Tutorial*. PSYCHOLOGICAL STATISTICS. Retrieved from <https://statistics.arabpsychology.com/?p=17887>

The Significance of Quartiles in Data Analysis and Distribution

In the expansive field of [statistics](#), [quartiles](#) stand out as essential descriptive metrics used to capture the fundamental characteristics of data spread and [data distribution](#). They provide a quick, robust summary of a numerical [dataset](#) by dividing it into four distinct segments, ensuring that each resulting segment holds exactly 25% of the total observations. This division offers immediate clarity regarding the central tendency, overall variability, and potential skewness present within the data, which is invaluable before proceeding to deeper analytical models.

Understanding the location of these division points is paramount for any thorough distributional analysis. While the full range of data is considered, attention is specifically focused on three primary quartiles, each corresponding precisely to a critical [percentile](#) boundary within the dataset:

First Quartile (Q1): This is the 25th percentile mark. Its value signifies that 25% of the observed data points fall at or below this specific measurement. It establishes the lower boundary of the middle 50% of the data.

Second Quartile (Q2): Universally recognized as the [median](#), this crucial point represents the 50th percentile. The median is perhaps the most important measure of central tendency, as it precisely bisects the dataset, providing a value robust against extreme outliers.

Third Quartile (Q3): Corresponding to the 75th percentile, this value indicates that 75% of all data points are less than or equal to it. It serves as the upper boundary for the central 50% of the data, helping analysts define high-performance or high-value thresholds.

By effectively establishing these three boundaries (Q1, Q2, and Q3), analysts gain the ability to rapidly summarize even extremely large datasets. This process facilitates the efficient identification of the interquartile range (IQR), which measures the spread of the middle 50% of the data, alongside the quick detection of potential outliers or inherent biases in the data spread, making quartile analysis a foundational step in data quality assessment.

Leveraging DAX for Precision Quartile Calculations in Power BI

To integrate advanced statistical concepts such as quartiles into actionable business intelligence reports, we must utilize the powerful analytical environment of [Power BI](#). The critical tool for this task is [DAX](#) (Data Analysis Expressions), Microsoft's robust functional language designed specifically for data modeling and calculation within Power BI, Analysis Services, and Excel Power Pivot. DAX provides specialized functions that handle the complex logic required for accurate percentile calculations, which are the fundamental mechanism for determining quartile values.

The primary and recommended DAX function for quartile determination is `PERCENTILE.INC`. This function operates based on the inclusive method, which means that the minimum and maximum values present in the data column are considered part of the potential calculation range. This

inclusion ensures a comprehensive and accurate measure of the data distribution. To use this function effectively, the syntax demands three specific arguments: the name of the relevant data table, the targeted numerical column containing the data points, and the desired percentile, which must be expressed as a decimal value (e.g., 0.25 for Q1, 0.5 for Q2, or 0.75 for Q3).

Defining these calculations as reusable measures within the Power BI data model is the best practice for scalability and consistency. The generalized syntax presented below demonstrates how to structure these measures to calculate Q1, Q2, and Q3 for any specified column, ensuring the logic remains clean and easily auditable across different reports and dashboards:

Q1 = PERCENTILE.INC(table_name, 0.25)

Q2 = PERCENTILE.INC(table_name, 0.5)

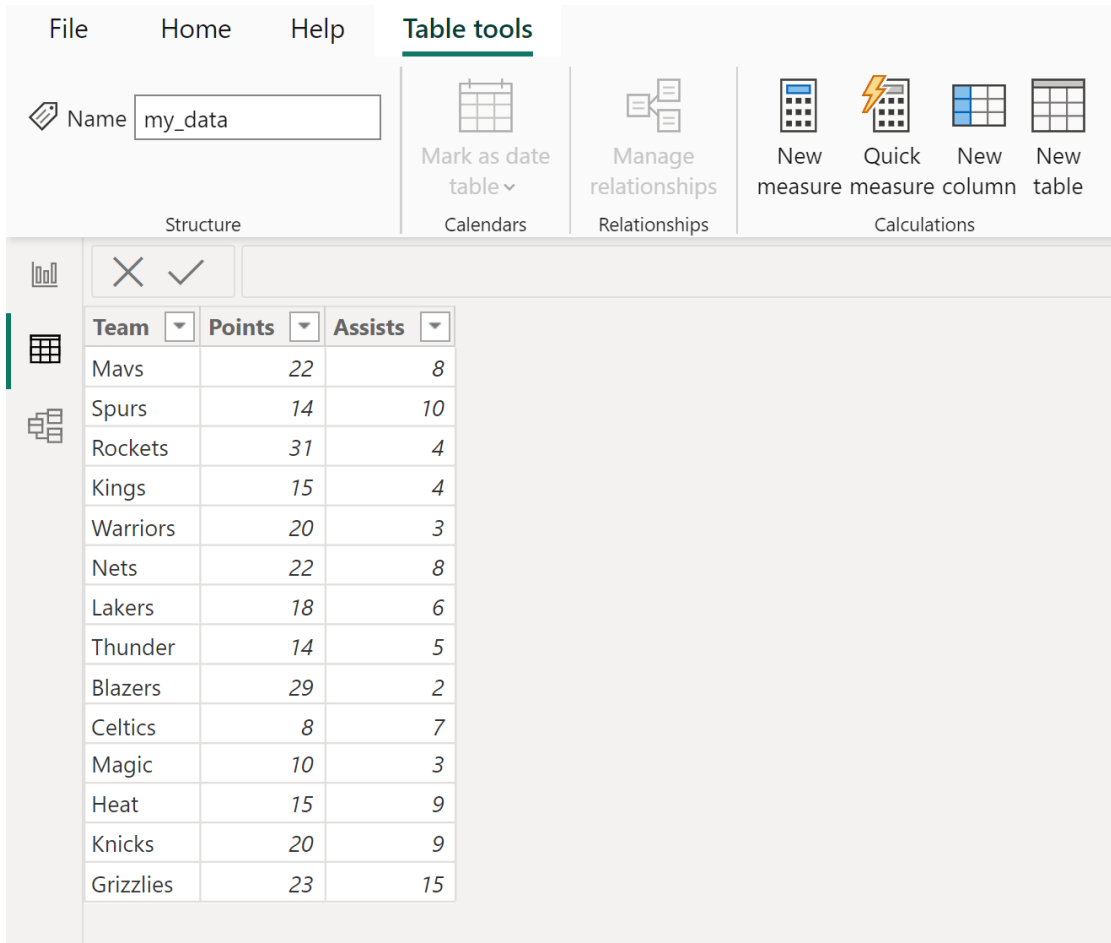
Q3 = PERCENTILE.INC(table_name, 0.75)

A deep understanding of this foundational DAX structure is essential for moving beyond basic aggregation. Once this syntax is mastered, analysts are equipped to implement these statistical measures in any practical data scenario. The subsequent section provides a comprehensive, step-by-step walkthrough detailing the implementation process directly within the Power BI desktop environment, ensuring a clear path from theory to practical application.

Demonstration: Calculating Performance Quartiles with DAX Measures

To concretely illustrate the process of quartile calculation, let us work through a practical scenario involving performance data. Imagine we are tasked with analyzing the scoring metrics of professional basketball players, where all relevant statistics are stored within a data table named **my_data**. This real-world example will solidify the application of DAX measures in a structured data model.

While the dataset may contain numerous variables, our analytical objective is singular: determining the distribution characteristics of the players' points scored. Specifically, we need to calculate the first, second (median), and third quartiles for the **Points** column. The underlying data structure, visible in the data view below, shows the raw scores that will be subject to our DAX calculation:



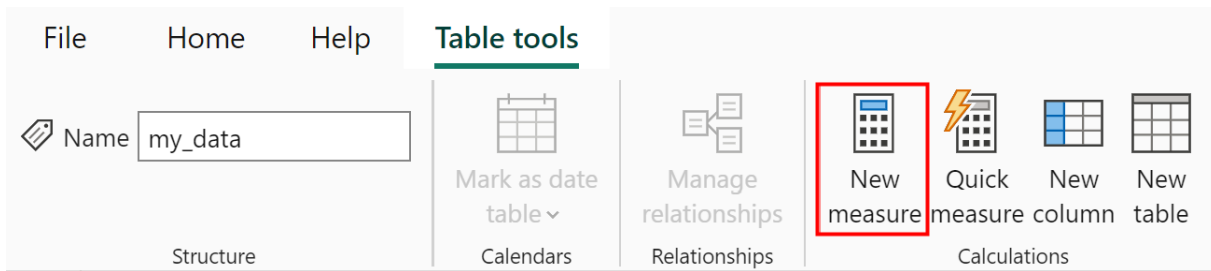
The screenshot shows the Power BI Desktop interface with the 'Table tools' ribbon tab selected. The ribbon contains several groups of options: 'Structure' with a 'Name' field containing 'my_data'; 'Calendars' with a 'Mark as date table' button; 'Relationships' with a 'Manage relationships' button; and 'Calculations' with four buttons: 'New measure', 'Quick measure', 'New column', and 'New table'. Below the ribbon, a table is displayed with the following data:

Team	Points	Assists
Mavs	22	8
Spurs	14	10
Rockets	31	4
Kings	15	4
Warriors	20	3
Nets	22	8
Lakers	18	6
Thunder	14	5
Blazers	29	2
Celtics	8	7
Magic	10	3
Heat	15	9
Knicks	20	9
Grizzlies	23	15

The calculation of these three quartiles will immediately provide a high-level summary of the scoring distribution. This summary allows us to quickly identify benchmarks, such as the minimum score achieved by the top 25% of players (Q3) and the median performance level (Q2). By integrating these calculations directly into the Power BI model, we eliminate the need for cumbersome external calculations or manual data sorting, enabling dynamic and real-time performance monitoring within reports.

Step-by-Step Implementation of Q1, Q2, and Q3 Measures

The implementation begins with the creation of the first quartile (Q1) measure. Within the Power BI Desktop interface, navigate to the **Table tools** ribbon tab. Locate and click the **New measure** icon. This action initiates the Measure creation process, which is the standard procedure for defining dynamic calculated fields. These measures are context-aware, meaning they automatically adjust their output based on any filters or slicers applied in the report, making them perfect for summary statistics.



In the formula bar that subsequently appears, input the precise DAX expression required for the Q1 calculation. This example defines a measure named `Q1 Points`, explicitly targeting the **Points** column within the `my_data` table and specifying the 25th percentile (0.25) as the calculation argument:

Q1 Points = PERCENTILE.INC(my_data, 0.25)

Upon successful execution, this formula adds the new `Q1 Points` measure to the data model. When dragged onto a visualization (such as a Card visual), the measure dynamically outputs the precise value of the first quartile for the selected column, confirming that 25% of the observed player scores fall below this calculated value. The immediate result of this calculation is visually represented below, demonstrating the measure's successful deployment:

The screenshot shows the Power BI interface with the 'Measure tools' ribbon active. The 'Name' field is set to 'Q1 Points' and the 'Home table' is 'my_data'. The 'Format' dropdown is set to 'General'. The formula bar displays: `1 Q1 Points = PERCENTILE.INC(my_data[Points], 0.25)`. Below the formula bar is a data table with the following data:

Team	Points	Assists
Mavs	22	8
Spurs	14	10
Rockets	31	4
Kings	15	4
Warriors	20	3
Nets	22	8
Lakers	18	6
Thunder	14	5
Blazers	29	2
Celtics	8	7
Magic	10	3
Heat	15	9
Knicks	20	9
Grizzlies	23	15

The subsequent calculations for the second and third quartiles follow an identical, streamlined procedure. The process requires creating two additional new measures, adjusting only the percentile argument within the `PERCENTILE.INC` function for each. For the second quartile (Q2), the argument must be set to `0.5`, and for the third quartile (Q3), it is set to `0.75`. Crucially, ensure these new measures are clearly and intuitively named--such as `Q2 Points` and `Q3 Points`--to maintain impeccable clarity and organization within the expansive data model. Once all three measures are finalized, they become readily available within the Field list, prepared for integration into any report visualizations or further analytical calculations.

Team	Points	Assists
Blazers	29	2
Celtics	8	7
Grizzlies	23	15
Heat	15	9
Kings	15	4
Knicks	20	9
Lakers	18	6
Magic	10	3
Mavs	22	8
Nets	22	8
Rockets	31	4
Spurs	14	10
Thunder	14	5
Warriors	20	3

14.25

Q1 Points

19.00

Q2 Points

22.00

Q3 Points

Analyzing and Interpreting the Final Quartile Metrics

With the successful calculation and deployment of all three quartile measures (Q1, Q2, and Q3) into the visual report, the final step involves synthesizing the resulting values to derive actionable insights regarding the dataset's distribution. Returning to our basketball performance example, the calculated quartile results were:

The first quartile (Q1) value was calculated as **14.25**.

The second quartile (Q2), which serves as the dataset's [median](#), resulted in **19**.

The third quartile (Q3) value was determined to be **22**.

These three metrics deliver powerful and immediate context to the scoring data. Specifically, knowing Q1 (14.25) informs us that the lowest-scoring 25% of players achieved scores of 14.25 points or less. The median score (Q2) of 19 is vital, indicating the central performance level; exactly half of all players scored above this mark, and half scored below it. Furthermore, Q3 (22) confirms the performance boundary of the top scorers, establishing that 75% of all players scored 22 points or less, thus clearly separating the top 25% performers from the rest of the dataset.

By relying solely on these three concise measures, analysts gain a robust, initial comprehension of the data's spread and central tendency within the **Points** column. This summary is highly efficient for crucial analytical tasks, including rapid data comparison across different segments, calculating the interquartile range (IQR) for volatility assessment, and performing effective anomaly detection.

For those seeking deeper technical specification regarding the calculation methodology, Microsoft provides complete documentation for the `PERCENTILE.INC` function within the [DAX](#) language reference.

Further Resources for Advanced Power BI Data Modeling

While mastering quartile calculation is a crucial achievement, it represents only a single element in unlocking the comprehensive analytical capabilities of Power BI. Continuous enhancement of data modeling and visualization skills is essential for generating sophisticated business intelligence. Analysts are strongly encouraged to explore additional resources that detail methods for executing other common and highly complex analytical tasks within the platform, building upon the foundational knowledge of DAX measures established here.

The following tutorials offer explanations and guidance on implementing various other essential data analysis techniques within the Power BI environment, ensuring your analytical toolkit remains sharp and expansive: