Chapter 9

Communicating Data to an Audience

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Communicating data in an effective and efficient story requires the content author to recognize the needs, goals, and knowledge of the intended audience. Do we, the authors, need to explain how a particular chart works? It depends on the audience. Does the data need to be traced back to its source? It depends on the audience. Can we skip obvious patterns and correlations and dive right into the deeper points? It depends on the audience. Do we need to explain what the findings in the data mean in terms of what the data represents? It depends on the audience. There are many more questions for which this is true.

It appears reasonable, then, to learn who that audience is and what they might know. In addition, designers might also want to know what their audience’s expectations and needs are: what does the audience want to get out of the story? A single story cannot possibly address all possible different audiences and their needs. And any well-designed story will be tailored not just to its data and the intended message, but to its audience.

That is the theory, at least. In practice, this is quite difficult to achieve. A large audience will consist of people with different backgrounds and knowledge levels that are impossible to target at the same time; in breaking news and media production, short deadlines often make it impractical to create multiple versions of a news graphic that will work on different devices; in other fields, personnel or financial considerations may constrain the ability to create a product that targets the correct audience. Knowledge about the audience is also often quite limited. It tends to be general and broad, and usually not specific enough to target visualizations to individuals.

Despite these limitations, considering the audience, even broadly, can help guide the design of visual stories. The results are more appealing, effective, and meaningful to the intended recipients.

In some cases, content authors know precisely to whom a presentation or report will be given: what they know about the data, the background, etc. In other cases, the story author may at least have an expectation or an
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imagination of who they think the audience may be (Litt, 2012), such as
the general level of data and visualization literacy of a particular publi-
cation’s target audience. Such audience expectations inform the editorial
decisions that need to be made about visualizations and news graphics.
For instance, if the intended audience for a story is teenagers with limited
statistical or visualization literacy, then additional explanation or context
might be needed for less-common chart types so that they can be accu-
rately interpreted.

Different audiences not only have different levels of familiarity and
literacy with visualization, they also have different goals, expectations,
attention spans, and cognitive abilities. A general reader of a newspaper
has very different needs and goals than an academic researcher reading
a scholarly journal or a policymaker reading a briefing memo. A televi-
sion audience will expect a different kind of presentation than a newsprint
reader or a news website user, who in turn will have different expectations
than those in a meeting with colleagues.

A television audience’s attention span might be on the order of a few
seconds. For Web audiences, some data show that 55% of users spend less
than 15 seconds on an item of news content (Haile, 2014). By contrast,
communicating data and stories to people who need the information to
make decisions or change policies—for example, executive managers or
policymakers—attention may be substantially longer because the infor-
mation being communicated is essential to their performance. Other
audiences may want to accomplish different things by reading a data story,
such as being entertained, educated, or satisfying their general curiosity.

To effectively communicate ideas and concepts, content authors need
to think carefully about how their work best fits the needs of the audi-
ence. In this chapter, we explore design considerations relating to audi-
ence knowledge and goal contexts, and consider the difference between
the theory of what we might know and the reality of what we can know.
We discuss some approaches that allow us to tailor a piece to the audience
with little or no knowledge about them. Finally, we describe a few specific
design contexts and their particular requirements, such as news graphics
and broadcast television.

WHAT DOES THE AUDIENCE KNOW?

Identifying the background knowledge of an audience for any given
project is a challenging endeavor. In this section we identify some of the
audience knowledge characteristics that are important when communicating information driven by data and told through text, images, and data visualizations.

Through discussion of our experiences coming from different backgrounds and past work experiences, we have identified three general areas where content producers could know more about their audience. Such knowledge would enable more effective communication of data-driven content.

1. How literate is the audience in terms of data and visualization? And what can be done to increase it?
2. How knowledgeable is the audience in terms of jargon, domain expertise, and other background knowledge?
3. What are audience expectations about the design of visualization, such as style, tone, or the use of iconography?

Data and Visualization Literacy: The Annotation Layer

Definitions of visualization literacy describe the ability to interpret visual patterns of the underlying data, and to confidently use a visualization to answer questions about the data (Boy et al., 2014). As the value and availability of data continues to grow, so does the demand for understanding data and graphs—of increasing visualization literacy. Data science and data visualization courses and training in the private sector, in postsecondary schools, and in online training programs have increased substantially over the past few years (Womack, 2014). The onus is not just on the audience. Data storytellers have an ethical obligation to ensure that their visualizations do not skew or mislead interpretations unnecessarily (see Chapter 10 entitled “Ethics in Data-Driven Visual Storytelling”), and this intersects with the literacy level of the expected audience. Increasing an audience’s understanding of different data and graph types may come from a variety of sources, some within the content-producers’ control, others not.

In news graphics, the solution is what is usually called the annotation layer. Annotations add explanations and descriptions to introduce the graph’s context, which is important for almost any audience (Hullman et al., 2013). They can also explain how to read the graph, which helps readers unfamiliar with the graph—whether a simple line chart or an advanced technique like a treemap or scatterplot. When done right, the annotation layer will not get in the way for experienced users.
Annotations and explanations have a long history. Figure 9.1 shows a line chart in *The New York Daily Tribune* in 1849 in which the addition of an explanatory caption and annotations help guide the interpretation of how to read the then-still unfamiliar line chart.

Amanda Cox, the editor of the “Upshot” at *The New York Times*, is famously quoted as saying, “The annotation layer is the most important thing we do...otherwise, it’s a case of here it is, you go figure it out” (Cox, 2011).

.Annotation goes beyond just labeling points or lines on a chart: the bubble plot shown in Figure 9.2 from the *Los Angeles Times*, for example, expertly combines annotation that explains how to read the chart with what the content means. The chart shows the relationship between the change in violent crime rate (horizontal axis) and the property crime rate (vertical axis) in about 30 cities in California. For readers familiar with this chart type, it is immediately clear how to glean conclusions from the data. The average *Los Angeles Times* reader may not be familiar with this chart type, so upon first viewing the graphic, there is a big red box in the top-right with big red text that says “Worse,” and a big blue box in
Background Knowledge and Expertise

A content producer may face an audience with different levels of expertise or knowledge on any given topic. Readers of a large daily newspaper like *The New York Times* or *The Washington Post* may reflect a variety of different levels of expertise, especially across the different topics covered by the publication. By contrast, readers of the *Financial Times* may have more
domain-specific expertise in certain areas, especially as the *Financial Times* tends to focus their reporting on the financial sector. The audience for a small local publication is likely to have knowledge of the local area, whereas the same could not be assumed for the audience of a large national or international publication. Data storytelling needs to take into account the baseline of information and knowledge that the intended audience is expected or assumed to have.

Different levels of expertise and knowledge should encourage content producers to think carefully about how their products will best meet the needs of a diverse audience. Niche audiences may be more comfortable with the jargon of their group, but designers may consider whether removing jargon would serve a larger audience just as easily while making the content more broadly accessible. Universal design is an aspiration that can allow data stories to appeal to and be used by a broad array of people (Shneiderman et al., 2016), but design is also about tradeoffs that may make a data story less appealing to some, while simultaneously much more appealing and useful to others. In such cases, different versions of the story might be produced for different audiences, each targeting a unique range of knowledge, expertise, and other factors discussed in this chapter.

An individual in the audience brings their own viewpoints, backgrounds, and experience to each and every data-driven story they consume. Whether driven by their cultural background, social position, education, or other demographic characteristics, readers carry with them their own unique set of knowledge and biases. While it is impossible for content producers to be aware of each individual’s particular experience—to know in advance what they already know—it may be possible to group individuals (i.e., to segment the audience) in ways that are useful to guiding design.

Some examples may be illustrative here. The first comes from the Congressional Budget Office (CBO), which is the budget arm of the United States Congress. The CBO reports and numbers are regularly used and referenced by Congress, as is often dictated by law. Their audience of the members of Congress and their staffs is well-defined and well-known. That audience wants (and needs) headline numbers, facts, and statistics that they can use to communicate with their colleagues and their constituents. In June 2012, the CBO published its “Long-Term Budget Outlook,” a 109-page report about the budget outlook for the federal government (CBO, 2012). Paired with that report was a one-page infographic that highlighted the top-level items, facts, and patterns (see Figure 9.3). In a
FIGURE 9.3 The 2012 Long-Term Budget Outlook infographic from the Congressional Budget Office.
congressional hearing about the long-term budget outlook, Ranking Member Congressman Chris van Hollen (D-MD) held up that infographic as an exhibit to support his point (CSPAN 2012). From the perspective of the CBO, this is arguably recognizing the needs of their audience and how a member of Congress could effectively use their analysis.

Another example comes from the Urban Institute, a nonprofit research organization in Washington, D.C. The Urban Institute is not only interested in communicating with policymakers, but is also interested in communicating their work to a broader audience of local and state policymakers, other researchers, practitioners, the press, and the public more broadly (see, also, Chapter 8 entitled “Organizing the Work of Data-Driven Visual Storytelling”). Thus, in some ways, the Urban Institute is similar to the news organizations mentioned above, but communicating to an audience that is particularly interested in the kind of in-depth social and public policy research they conduct.

In August 2013, with the release of a report on the potential policy responses to long-term unemployment in the U.S., the Urban Institute published a “long-form narrative” story on its website that combined the highlights from the report with interactive data visualizations, photographs, and sound clips from interviews with people who were unemployed (Acs, 2013). Recognizing that the traditional reports may not always have impact or reach a broad(er) audience, this type of data-driven story—which is now common for news organizations—is still fairly uncommon in the social science and nonprofit research space.

**Design Expectations**

Basic data visualization best practices and strategies are needed across multiple domains to help content creators find better ways to communicate their work to their audiences. Many people who have experience working with data and conducting in-depth analysis may not have the knowledge or experience in how to communicate their work. The field of data visualization—a broad field that can be considered to encompass data journalism, data science, data visualization, scientific research, as well as general practitioners—continues to evolve in the face of new methods, tools, and data. A growing number of books, blogs, and articles have been published just over the past few years dedicated to helping people improve their visualizations.

A consistent design approach (one might call it “visual branding”) can help an audience relate to a producer’s work and entice them to return.
Consistency across color, font, layout, and type of interactivity, for example, can help the audience better identify what the producer is going to deliver, when, and for what level of expertise. Conventions used in presentations can also reinforce good data hygiene and inform the audience as to the quality of a visualization such as when source and designer credits or methodologies are consistently incorporated into the story delivery (Hullman and Diakopoulos, 2011; Schwabish, 2016a).

Graphics from outlets such as *FiveThirtyEight*, *Vox*, *The New York Times*, *The Economist*, and others each have a specific design aesthetic. The inclusion of their brands’ colors and fonts, a specific text or annotation style, and method of publication (e.g., daily, blogs, etc.) all help audiences recognize and relate to the producers’ content. Practically, a design aesthetic is enculturated by having style guides that designers working for a given publication use to help choose colors, fonts, and layout. Nonprofit organizations such as the Urban Institute* (see Figure 9.4) as well as news outlets such as the *Dallas Morning News†* have even published their style guides publicly. These guides help enforce a consistency of visual output (see Schwabish 2016b for a collection of other style guides).

Another dimension that informs design expectations is cultural differences and viewing codes. For instance, the layout of design elements such as the title and credits in Western cultures may not meet expectations in cultures that read from right to left. Such differences may be particularly relevant for complex designs that can evoke a layer of meaning via connotation. For instance, colors can suggest very different meanings in the East versus West: in Asia, white is often the color for mourning, whereas it is black in most of the West (Ware, 2008). This complicates the design process for data stories that are oriented towards a global audience such as may be the case for international publications.

**WHAT DOES THE AUDIENCE WANT?**

Like any other designed experience, data stories are more impactful and useful when they are crafted with the motivations, goals, and tasks of users in mind—in this case the audience for the story. The following subsections explore several typical wants and needs from media consumption that may impact design, as well how interactivity can be leveraged to increase the adaptability of data stories to different user needs and contexts.

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* http://urbaninstitute.github.io/graphics-styleguide/.
† https://knightcenter.utexas.edu/mooc/file/tdmn_graphics.pdf.
FIGURE 9.4 The “Chart Parts” section of the *Urban Institute Data Visualization Style Guide*. 
Media Wants and Needs

The uses and gratifications framework describes a set of dimensions that can influence why people consume media (Ruggiero, 2000). The idea is that people receive certain gratifications from the media they consume that help satisfy various underlying social or psychological needs. For instance, people may seek out data-driven stories for a variety of reasons such as to inform themselves on an issue of personal (e.g., health) or civic importance (e.g., elections), or to casually lean back and be entertained or pass time in a non-goal-oriented fashion. The uses and gratifications framework suggests that there are four primary underlying motivations for media consumption:

1. Staying informed about current information, satisfying curiosity and self-education;
2. Gaining insight into oneself or seeing models for others’ behavior;
3. Socially interacting and connecting with others, or as a basis for social conversation or developing empathy; and
4. As relaxing entertainment or diversion.

A data-driven story can be designed differently depending on whether the audience is expected to approach the experience from a more social, entertainment, or strictly informational motivation. For example, an entertaining treatment might take more license with visual novelty and not focus as closely on efficiency in decoding visual information. A social treatment might emphasize user comments and responses to a data story, whereas an information-oriented design may focus on well-researched and validated background context provided in an annotation layer. The goal as a designer is to explore the design space in order to try to match the data story to the expected media need of the audience.

An individual’s needs from a piece of media like a data story can also vary with the intended interface. For instance, if a story is likely to be consumed on a mobile device, the user could be in a loud or distracting environment that might undermine the use of audio in the narrative (written annotations as backup is a nice design strategy). The specific location of a user on a GPS-enabled device can be interesting context that can be used to inform the way a story is presented (Kim et al., 2016). In contexts that are more casual than work-oriented, users may have a higher
degree of interruptibility, which could mean that a data story is consumed in short bursts of attention. Presenting information in “chunked” patterns might be more effective than as a single, long-form narrative in such cases. Finally, it is worth considering that boredom may be a driving factor for interaction in contexts where the user is consuming a data story while waiting (e.g., for a bus or train), or splitting attention between devices and screens (e.g., as many people do when watching television).

**Tailoring to the Audience Without Knowing It**

Even if we do not know anything about the audience, we can make it appear as if we did. The audience knows itself: they can pick their city in a story about home prices, their age and gender in a story on health, and their education and income levels in a story about taxes or inequality.

This self-identification in a visualization may be why maps are such a popular tool in data visualization. While maps can often present data inaccurately, or even mislead a reader, broad familiarity with maps makes them a convenient and familiar visualization choice (Wiseman, 2015). Alternatives—such as cartograms, which distort geographic areas to correspond to the data values—sometimes have the advantage of portraying the data in more accurate ways, but the distortion makes the visualization less familiar to the reader.

A variety of other projects and research have tested or demonstrated the importance of allowing the audience to “find themselves” or make content more familiar in a visualization. For example, research by Chevalier et al. (2013) attempts to build a framework to help people think about the best ways to communicate numbers that are very large. More specifically, Kim et al. (2016) construct an online interactive application that enables users to re-express spatial measurements in localized terms—in other words, users are able to build a map that makes a distance relevant to their area or experience.

Even outside of maps, readers locating themselves in the data is likely to make them more engaged. A piece breaking down the unemployment rate by race, gender, age group, and education level (Carter et al., 2009) allows the reader to compare themselves to the average and to other specific groups. While not all possible criteria are covered, this piece gets much closer to an individual than just the unemployment rate that averages across everybody. Similarly, a line chart showing the Case-Shiller Home Price Index for 20 cities lets the reader pick their city and see how housing prices have changed over the years (Carter and Quealey, 2014).
Directly Engaging the Audience

A somewhat similar approach asks the audience questions to involve them in what is shown. This can help engagement by allowing them to place themselves in a context (and at the same time also collect data to be shown to everybody), and it has also recently been found to help people remember what they have seen.

In 2011, *The New York Times* published “The Death of a Terrorist: A Turning Point?” (Huang and Pilhofer 2011) where readers were invited to position their opinions on the death of Osama bin Laden in a two-dimensional matrix: whether their response was positive or negative overall, and whether they thought that this event was going to be significant in the war on terror or not. The resulting heatmap of responses showed the landscape of people’s responses.

Analogous pieces have since appeared in different media, such as *The New York Times*’ “You Draw It: How Family Income Predicts Children’s College Chances,” which allowed users to draw their idea of the correlation between parents’ income and their children’s ability to attend college (Aisch et al., 2015). Similar data stories have been published to let readers predict price changes for common goods to match an inflation goal (Canipe et al., 2016), draw the border between West Germany and the German Democratic Republic from memory (Keseling et al., 2015), or guess the rate of teenage pregnancies in the UK (ONS, 2016) (Figure 9.5).

Interactive pieces like this are still relatively rare, but they are slowly gaining momentum. A recent study tested the effect of asking readers to make estimates before showing the actual data on memory (Kim et al., 2017) (Figure 9.6). It showed that asking participants to reflect on their prior knowledge by guessing numbers or explaining them helped readers with both comprehension and memory of the data.

Engaging an audience is possible even without much knowledge about its members’ backgrounds, level of domain knowledge, etc. Personalization as discussed in the previous section and engagement through questions have both been tried and found to be quite effective.

SPECIFIC DESIGN CONTEXTS

In addition to the audience itself, the medium used to reach that audience is an important factor that shapes what is possible in practice and what people expect. A detailed news graphic designed for print will not work on television, and a television piece will look out of place on the Web.
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For every 100 girls aged under 18 in 2014, how many become pregnant?
This is all conceptions for girls under 18, per 100 girls aged 15 to 17

FIGURE 9.5 In this interactive piece by the UK’s Office of National Statistics, readers are first asked to make an estimate using the slider at the bottom, which fills in as many people as they are guessing (girls under 18 becoming pregnant, in this case). When they submit their guess, the difference between it and the real value is illustrated by a small animation and the numbers are shown on the right (ONS, 2016).

FIGURE 9.6 User interface used in a study to test the effectiveness of engaging readers by asking them to make guesses about the data first and then showing them how close (or far off) they were (Kim et al., 2017).
The Reality of the Newsroom

Over the last several years, the news media have created many of the most exciting examples of data-driven storytelling. News media, like other organizations, have struggled with different device types, browser idiosyncrasies, screen sizes, as well as different technologies and programming languages (such as the switch from Flash to HTML5).

Designing for devices means not only taking their idiosyncrasies into account, but taking advantage of them. Trying to design across many devices typically ends up with a sort of lowest common denominator that works but is not as effective as it could be on any specific device. See Chapter 6: “Watches to Augmented Reality: Devices and Gadgets for Data-Driven Storytelling” for more details.

Recently, many newsrooms have scaled back those efforts. The New York Times Graphics Editor Gregor Aisch described the problem as a cost-benefit tradeoff (Aisch, 2016). Many interactive news pieces see very little interaction—only 10%–15% of visitors interact with them. Even a simple secondary interaction, like left-right swiping to reveal more information when the main flow of the story is swiping down, is rarely used. This is despite efforts like adding prompts.

Designers have devised a number of work-arounds to make large graphical pieces work on small screens. For maps, a convenient one is to zoom the map into the location of the user, since that is likely what they are interested in. However, that often means that there is no way to zoom out to see it in its entirety. Aisch therefore proposes a variation of Shneiderman’s famous information-seeking mantra: “Overview first, zoom and filter, then details on demand” (Shneiderman, 1996) and for the reality of news graphics on mobile devices: “Details first, no zoom and filter, overview on desktop only.”

Newsrooms’ resources are limited, and they often produce news stories on tight deadlines (see also Chapter 8: “Organizing the Work of Data-Driven Visual Storytelling”). In light of this, it becomes necessary to consider not just the potential information value, but also the effort to make something interactive when so few readers ever get a benefit from it. Similar to Aisch, Tse (2016) argues that interactive data stories (at least in the newsroom) may not be the best approach. He makes a three-point argument:

1. If you make the reader click or do anything other than scroll, something spectacular has to happen.
2. If you make a tooltip or rollover, assume no one will ever see it. If content is important for readers to see, do not hide it.

3. When deciding whether to make something interactive, remember that getting it to work on all platforms is expensive.

Tse’s argument rests on changes in technology, and the changing business structure of the media industry (e.g., advertising efforts, subscription packages, etc.).

It is not clear what the solution is to these issues. One approach is certainly better tools that make it easier to create pieces in the first place and allow the author to target different platforms, either automatically or at least with some support. Another is to show potential interactions with little animations. This has been tried in projects such as Gapminder, but we are not aware of any studies to show if such animations would actually increase interaction. Perhaps the most important issue is still training the user: if readers are not used to charts responding and allowing them to interact, they will not try hovering over elements, etc. By creating more interactive pieces, media can train their readers to expect everything to be interactive, and thus increase interaction over time (whether this works or not will have to be studied longitudinally).

While news media often have a general idea of their audience, it tends to be vague and hard to use for practical decision-making. There are still considerable hurdles to using what is known to target the audience more specifically and precisely. There are many open questions here and ample need (and opportunity) for more research that could help improve the way news pieces are built and how they work.

Visualization for Television

Television is an unusual use case for visualization, even though its visual nature seems to lend itself well to it. This case study is based on the program *Le Grand Webzé*, which aired on February 24, 2012 on the France 5 channel (Huron et al., 2013b).

A television audience is highly diverse: almost any age, any level of education, any social position, economic role, and cultural interest is represented. Ratings agencies have been tracking audiences for decades, with age groups starting as young as 4 years old, with segments by age, gender, economic status, and if they are living in urban or rural areas. Television
audiences are also fickle, often switching programs and channels within less than a second.

The research and development services of the French National Television Network contacted Huron and his colleagues to create a system that would engage a television audience with online activity during a television show. The program is focused on Web culture and presents a review of the latest Web buzz as well as interviews of famous bloggers or Web artists. The goal was to allow viewers to interact with each other and to see a visual representation of that interaction on the program.

The design was made for the medium and the way it is consumed. To show vote tallies, bubbles would drop and form into bar charts (see Figure 9.7). The bubbles included small images of the people who had voted, making for a selfie moment and improving the visual interest of the graphic. Animation was used throughout to blend in with the always-moving nature of television.

Television presents unique design challenges for visualization: the amount of detail is very limited, there is no interaction, motion and animation are crucial, television graphics are often three-dimensional, etc. Despite its prevalence in popular culture, television as a medium is still almost completely overlooked in visualization research.

FIGURE 9.7 Photograph taken of the studio monitoring screen during the Le Grand Webzé television program. The visualization shows the votes of the show audience about the host’s popularity. Each circle represents a tweet sent during the last few seconds, the bar chart represents the total number of tweets for each hashtag. The visualization is updated continuously.
CONCLUSIONS

When presenting data and telling stories, it seems obvious to tailor the presentation to the audience. In practice, unfortunately, there are many reasons why this is not easy or even possible. It could be due to financial or personnel constraints, deadlines, uncertainty about the targeted audience, or even ignorance about audience capacities. Despite such uncertainty, one way to think about the audience could be to consider their data and visual literacy level, their attention span, background knowledge, and domain expertise.

The inability to know enough about the audience in many cases has led to some interesting approaches that have proven to be helpful beyond just tailoring a visualization to the reader or viewer. Personalization is an effective means not only to tailor a news piece to a particular reader in more detail than could be done otherwise, but also a way to help engage that reader. Asking for the person’s background knowledge by having them estimate a value first is necessary when the visualization designer does not know the reader, but this has proven helpful with memory and comprehension of the data being shown as well.

In an ideal world, the designer of a data story would know all the relevant information about his or her audience and be able to put that into practice. Some things are easier to measure or assess, like a person’s visualization literacy or familiarity with a particular chart type. Others are harder or close to impossible, like a person’s background knowledge about a topic or question they might have. Even without being able to answer these questions, a well-designed story brings in many different viewers by providing pieces of context that are likely relevant to most users without cluttering up the display. Going further, it is conceivable that a story would measure a viewer’s visualization literacy in an unobtrusive (or perhaps clandestine) way and adapt the amount of information being shown, as well as the types of visualization, etc.

Smart design takes available knowledge about the audience into account, but does not depend on it being available. Many design decisions are also driven more by general ideas about effective presentation than specifics about a particular audience. A better understanding of the audience will likely lead to better data stories, but the current state of the art in news graphics, television, and other areas shows that good designers are able to create compelling stories even when faced with a limited knowledge of the actual audience.
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