

Without An Opinion, You're Just Another Person With Data

Milo Jones and Philippe Silberzahn

4–6 minutes

If you think Big Data will make you smarter, and that having an opinion is a bad idea when considering an important decision, think again.

A Brave New World Of Data

“Without data you’re just a person with an opinion.” The words of W. Edwards Deming, patron saint of the quality movement, reflect postwar naiveté about the possibility of blank-slate objectivity which in many fields was tinged with outright scientism. In science, you don’t want opinions, you want to look at the facts, and these must be objective. Your opinion doesn’t count. Whether you like it or not, the Earth revolves around the Sun, and you know it by looking at the facts informed by repeated experiments.

The good news is that we have more and more facts, more and more data. In fact, data is everywhere. Any time you spend on the Internet, the sites you visit and the services

you use accumulate an enormous amount of data on your behavior and your preferences. They are the digital exhaust of modern life. Linked to your credit card expenses and retailers can gauge when you're expecting a baby, welcoming friends, or interested in buying a house. Use Google Maps, and Google will know everything about your driving behavior and where you go on weekend, making it possible for the Web giant to sell you cheap insurance or weekend packages perfectly tailored to who you are. The list grows daily.



In fact, according to some we are now accumulating so much data that we are at the dawn of a new era, an era of scientific decision-making where all human biases can be avoided, perfect decisions can be made and, most importantly, key events can be anticipated. Terrorists can now be traced by monitoring their every whereabouts: their cellphone, their Internet connection, their use of social networks. Indeed, as Stansfield Turner, a former head of the CIA, wrote, "We should soon be able to keep track of most activities on the surface of the earth, day or night, in good weather or bad."

Data Does Not Make You Smarter

Yet this belief in a brave new world of near-perfect

knowledge is not new. Turner's words weren't written yesterday. They were written in 1986. The immense technical ability to collect and monitor data is not new, yet it didn't prevent dramatic surprises such as the Cuba missile crisis or, closer to us, 9/11, the Arab Spring or the Benghazi attacks.

Indeed, as early as the 1960s, in her landmark study of the Pearl Harbor attack, Roberta Wohlstetter argued that the Japanese attack succeeded because of an *overabundance* of data: "At the time of Pearl Harbor the circumstances of collection in the sense of access to a huge variety of data were...close to ideal." Problems arose, not from too little information, but from too much, and from the inability to glean useful "information" from mere "data." She concluded that the job of lifting signals out of a confusion of noise is an activity that is very much aided by hypotheses. After 9/11, this is referred to as finding "Red flags in a sea of red flags." Truly strategic – as opposed to tactical or operational - intelligence deals not with secrets sifted from masses of data but with political, economic, military and cultural forces that may be visible to the naked eye but are very difficult to synthesize and understand. Moreover, many of the "facts" created by big data are social, not natural, facts: that makes their predictive value decay over a half-life measured from centuries (fiat money) to hours (teenage fashion).

What it means is that in a world where data becomes plentiful, the risk is not the lack of data, but having too much

of it. The only solution to make sense of this sea of data is to have hypotheses, i.e. to have an *opinion* that will guide research on the mass of data.

This insight is not new. Indeed, in the field of management, Peter Drucker remarked long ago that

“Executives who make effective decisions know that one does not start with facts. One starts with opinions... The understanding that underlies the right decision grows out of the clash and conflict of divergent opinions and out of serious consideration of competing alternatives. To get the facts first is impossible. There are no facts unless one has a criterion of relevance.”

In short, without an opinion, you're just a person with data. Given the amount of data you now have, good luck with that.

