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# IPSOS VIEWS

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## Lost in a data jungle?

Nurture your research ecosystem  
to find your way out

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Do your tracking studies feel more like juggernauts than nimble research vehicles? Are you drowning in data but still left with unanswered questions? Do you want efficient, joined-up insight from your different data sources, but don't really know where to start?

You are not alone. The advent of Big Data has spelt the end of an era when data sources and research studies could be considered as separate entities, and rightly so: their combined power is so much greater than the sum of their parts.

But for those of us attempting to combine traditional survey data with newer survey sources such as Enterprise Feedback Management (EFM) and non-survey sources such as customer databases and in-house metrics, our experience may be less Big Data and more Big Headache. This is often because we want to link up our data sources, but they have not been designed with links in mind.

At Ipsos, we have developed a research ecosystem to help our clients find their way successfully through this data jungle.

**“For those of us attempting to combine traditional survey data with newer survey sources... and non-survey sources... our experience may be less Big Data and more Big Headache.”**

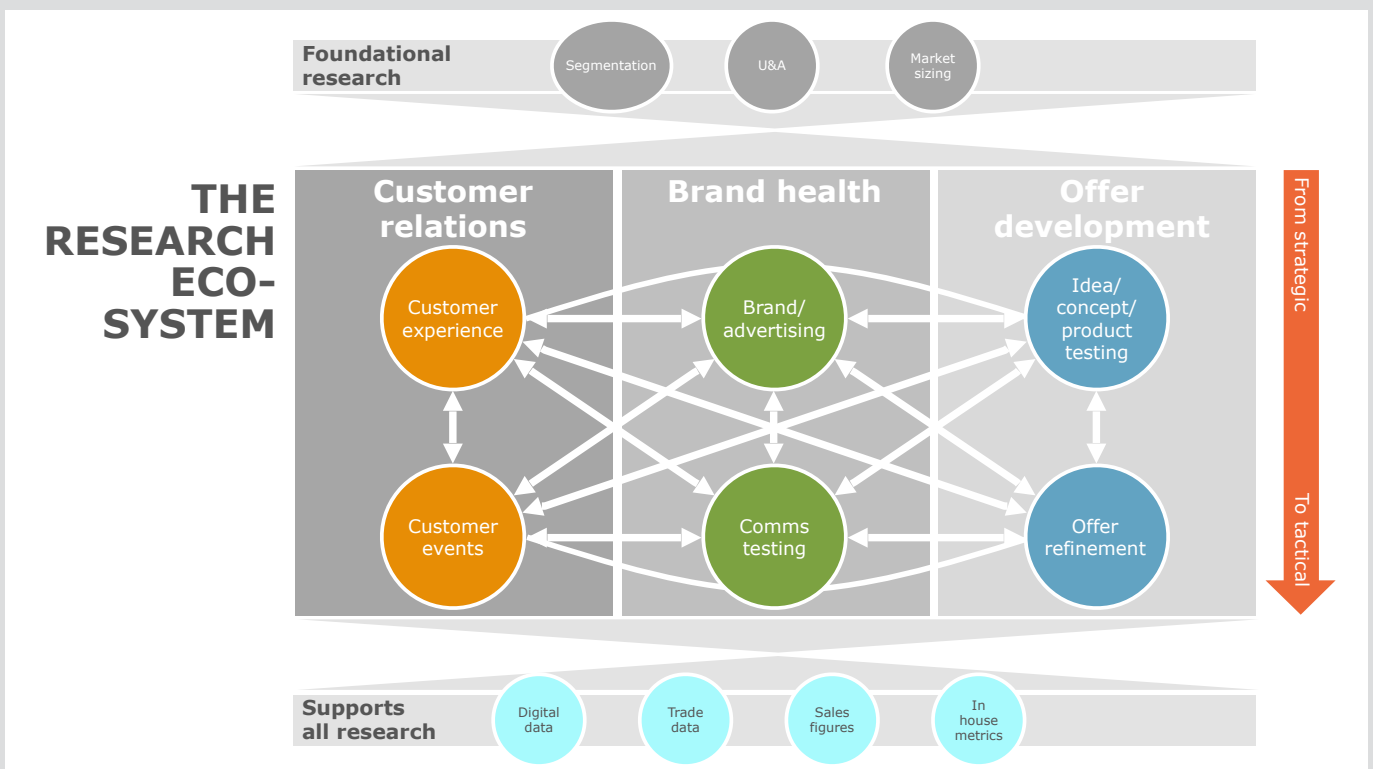
## Research *what?*

*Research ecosystem.* Each different research programme or study should serve a different role. By defining these roles and how they work together, multiple research studies can be combined to deliver holistic insight as efficiently as possible. This ultimately means greater return on spend.

It is this harmonious network of different research studies, supplemented by other data sources where available, that we call a research ecosystem. Each of these will be unique to the organisation that they reflect and to the team working with them (for example, the research ecosystem required by a customer experience team may look very different to that required by an advertising team).

It is when study roles are not defined or not respected that research programmes involving multiple studies can become confusing. This can make it hard to find space for new questions, or even to find the answers to existing questions, leading to a sense of drowning in data.

This is not a criticism of the organic growth or scope creep inherent in most ongoing research programmes: it is natural to want to get the biggest bang for your buck from any research study. By extension, the next step is to ask as many questions as possible in any given study. We are certainly not trying to stand in the way of this. But we are inviting owners of research programmes to step back and consider how each of their studies are used, and what the impact of longer questionnaires can be on the respondent experience and subsequent data quality.



Graphic adapted from an original by Gailynn Nicks, Chief Research Officer, Ipsos Connect

## What are the components of an ecosystem?

The goal of establishing a research ecosystem is to ensure that each of your questions is asked only where necessary; in the best vehicle for getting a response at a time that suits your business; and when the question is relevant to the respondent's experience of the organisation, brand or product.

**To achieve this, every research ecosystem shares the same essential components:**

“Defining the purpose of each study clarifies what data is available and when.”

COMPONENT	WHY
<b>All available data sources are identified</b>	Without knowing what data is available it is not possible to start piecing it together into an ecosystem, like doing a jigsaw without all of the pieces.
<b>A purpose is defined for each research study</b>	<p>This is crucial. Defining the purpose of each study clarifies what data is available and when. It also ensures that only questions relevant to a particular study purpose are asked.</p> <p>This component defines the scope of each study so that its place in the ecosystem can be found. To consider a jigsaw again, this gives each piece its shape.</p>
<b>All stakeholders declare their data needs</b>	<p>It's not possible to fulfil data needs without knowing what they are. This is akin to taking a look at the picture on the box of a jigsaw before starting to build it. What is the picture of? Customer experience? Marketing? Both? How much detail is there? Coming back to pulling together all data sources – do we have the necessary pieces to build it?</p> <p>There might well be surprise data discoveries along the way but this component establishes the insight that the ecosystem needs to deliver.</p>
<b>Owners/stakeholders for each data source are known and willing to share</b>	<p>You can't build a jigsaw if the pieces are locked in different boxes. Similarly the research ecosystem only works if data owners/stakeholders are known and willing to share with others.</p> <p>We know that many organisations have increasingly specialist and siloed teams. Sharing data between the teams may not be a given without this explicit agreement.</p>

Once these components have been established, an ecosystem can start to be developed. This approach carries five key benefits:

### 1. It identifies knowledge gaps

It is easy to see where there is a data requirement, but no questions or study in place to cater to this need. Conversely, it also pinpoints areas of duplication.

### 2. It boosts efficiency, saving costs and creating space

Questions can be naturally allocated to the appropriate study. This minimises duplication and by extension streamlines questionnaires and costs. Or, of course, the removal of duplicate questions can create space for new ones!

### 3. It delivers better quality data by improving the respondent experience

The defined purpose of each study confers focus onto each questionnaire, meaning the days of long, rambling questionnaires covering a diverse range of topics are over. This makes the questionnaire easier to follow for the respondent, ensuring that they give better quality results.

By the same token, matching questions to studies asked at the appropriate time in the customer life-cycle ensures that respondents are only asked questions that are relevant to their current experience (consider asking about complaints resolution immediately after the experience, or three months later). Thus the data becomes more reliable.



### 4. It facilitates data integration

It allows us to identify links between these studies – fostering an integrated approach for insight development.

For example, one of our clients knows that staff service is a key driver of satisfaction with using their business. While this was discovered through their relationship programme, they use the immediate feedback from post-customer call follow-up surveys to feed into action planning in this area. This integrated use of data doesn't just optimise the information available to them. It also ensures its reliability (see point 3) as this is when the interaction with staff members is top of their customers' minds.

### 5. It provides a framework for current and future programme design

It provides reassurance to all business stakeholders that their questions will be answered. In doing so, it also provides guidance for where future new questions should be placed, ensuring a balanced ecosystem of programme design going forward.

Moreover, it means that during data analysis, interpretation and reporting we have a clear indication of what data is available and where to find it.

## How does this help ensure my business questions are answered?

Framework and integration are key benefits that deliver this. The ecosystem renders explicit the relationship between different studies, allowing questions from one to be answered by data from another, simply by the juxtaposition of sources.

For example:

“An ecosystem approach makes more data available to answer any given question”

BUSINESS QUESTION	TRADITIONAL APPROACH	ECOSYSTEM APPROACH
<b>I need to know more about my customer service experience because my KPI scores have dropped</b>	Add new questions to your customer satisfaction tracker and wait for the results	<ul style="list-style-type: none"> <li>• Mine social media data to look for increases in complaints or expressions of dissatisfaction</li> <li>• Look to internal complaints data for increases in volume and/or new issues</li> </ul>
<b>How does what I communicate about my brand promise affect customer service expectations?</b>	Add a handful of questions from the brand study to the customer experience study or vice versa	<ul style="list-style-type: none"> <li>• Track trends over time from brand and customer experience studies to explore the relationship between them</li> <li>• Use the brand study to understand the influence of advertising on expectation</li> <li>• Use the customer experience study to understand how – or if – that expectation is met, touchpoint-by-touchpoint</li> </ul>
<b>How do I help my employees deliver a better customer experience?</b>	Make an informed guess about where the problems may lie	<ul style="list-style-type: none"> <li>• Map out differences in touchpoint perceptions from both customers and employees</li> <li>• Identify where employees have a different understanding of the problem to customers and help improve this through communication, training and support where required</li> </ul>

In summary, an ecosystem approach makes more data available to answer any given question, but in a way that is structured and manageable, rather than overwhelming.

## How is a research ecosystem established?

Three questions are at the heart of developing a research ecosystem.

QUESTION	PURPOSE
<b>WHAT do we need to know?</b>	<p>A deliberate attempt to move away from ‘what question shall we ask’ which often means we get lost in how to phrase something, rather than pinpointing exactly what it is that we need to know.</p> <p>Concretely, this means considering existing studies, and annotating exactly what these are getting at (or not getting at, if the sense of purpose has been lost).</p> <p>This provides an overview of what is already known, making it easy to identify duplication, gaps and questions to move.</p>
<b>WHEN do we need to know it?</b>	<p>This has two facets:</p> <p><b>When does the business need this information?</b></p> <ul style="list-style-type: none"> <li>• Is a quarterly frequency enough so that it can feed into strategic business planning? Or is it something more urgent that requires immediate attention (for example, a customer complaint that something is out of order)?</li> <li>• The timing requirements for these information ‘modes’ necessitates very different research vehicles.</li> </ul> <p><b>When does the respondent need to tell us about this?</b></p> <ul style="list-style-type: none"> <li>• Here we want to match appropriate questions to the relevant moment in the customer’s experience of an organisation.</li> <li>• Feedback on interactions or transactions needs to be shortly after these so that they can reliably remember the event, but questions about the more general ongoing experience of being a customer could wait until periodic trackers.</li> </ul> <p>Setting <i>what we need to know</i> against <i>when we need to know it</i> immediately sets out a matrix for what should be asked where, according to when each study is asked.</p>
<b>Do we actually need to ASK this?</b>	<ul style="list-style-type: none"> <li>• This challenges us to find alternative sources for the information we need, taking the strain off our primary research.</li> <li>• This can be at a question-by-question level, or at an entire study level. For example, do we need to ask someone who has called a contact centre how often they have called if our customer database holds this anyway? Can passive measurement deliver enough information about consumer behaviours to render a behavioural study obsolete?</li> <li>• At the heart of this is the ethos that we should not explicitly ask anything that can be easily derived through other data sources.</li> </ul>



## ESTABLISHING AND ECOSYSTEM: A CASE STUDY

We posed exactly these questions when conducting a recent ecosystem audit. Our brief was a focused one: to drive efficiency in one particular online programme by harnessing the power of other available data (whether from surveys or other data sources).

Our approach was first to map out the expected links between the ten or so different data sources available to us. *When* were they asked? *What* was the purpose of each? *How* do these sit together to combine a whole? This established the structure of the ecosystem.

We then turned to what was asked and delved into the detail of the study that we were focusing on. This involved systematic checks for unnecessary duplication between studies, identification of *necessary duplication* (for linkage work) and also identification of gaps.

### **At the end of the process we were able to make recommendations about:**

- Questions to move or remove (asked elsewhere and/or inappropriate to this study);
- Essential questions to keep (appropriate to this study only and/or needed for linkage work);

- Opportunities to build on insight by pulling together data from other sources (with mapped links to other sources); and
- Potential gaps (focus areas appropriate to this study and not asked here or elsewhere).

The result of this was a shorter questionnaire for the programme under consideration but without loss of information, as we were able to map out where this information could be found elsewhere. This evidence-based approach to where data comes from facilitated stakeholder buy-in to changes to the programme, by providing reassurance that their information needs would still be met.

The shorter questionnaire itself facilitated a move to a more device agnostic approach (the previous questionnaire length was not mobile friendly), while also helping to bolster response rates and respondent engagement.

Both of these outcomes provided support to the future health of the programme.



## But how do I link studies after setting up my ecosystem?

There are a number of choices here, which can be dictated by the nature of the problem that needs to be explored and the type of data available. **Some examples include:**

APPROACH	DESCRIPTION	EXAMPLES
<b>Side-by-side comparisons</b>	Insight experts make sense of multiple data sources by looking across them to find intuitive links	<ul style="list-style-type: none"> <li>Using social media data to ‘flesh out’ reactions to ad campaigns</li> <li>Using mystery shopping data about expected service levels to help unpick dissatisfaction with basic customer experience metrics</li> </ul>
<b>Bridging questions</b>	One of the rare occasions where the research ecosystem advocates using the same question across different studies in order to tie them together	<ul style="list-style-type: none"> <li>Using the same question in two (or more) studies to provide a link between the data from both sources</li> </ul> <p>For example: Touchpoint A is a key driver of satisfaction in a customer relationship study but no further detail on touchpoint A is available in this study</p> <p>But detailed drivers of touchpoint A are calculated in a transactional study</p> <p>Using touchpoint A as a bridge, the detailed drivers identified in the transactional study can be used as part of an action plan to improve overall satisfaction in the relationship study.</p>
<b>Unit level matching</b>	Analysts match data sets based on like characteristics (e.g. by matching respondents based on demographics, or stores based on locations)	<ul style="list-style-type: none"> <li>Tying together a segmentation study with an in-house customer database to allow segmentation flags to be applied to the customer database</li> <li>Tailoring subsequent communications/interactions to individual customers based on the segmentation work</li> </ul> <p>For example, when carrying this out for a recent client, we were able to segment their customer base based on life-stage, helping them to tailor offers and marketing materials to their customers’ needs.</p>

Moreover, for many businesses, linking data sources can be facilitated by new technologies. The advent of fully integrated Enterprise Feedback Management (EFM) platforms that can host multiple data sources are the perfect example. These systems can present data side-by-side, provide links between sources via bridging questions or even make data sources readily available for export for statistical analysis. Consequently, they can make working with an established research ecosystem feel seamless.

## What are the biggest challenges?

For smaller programmes that include relatively few studies and stakeholders, the principles of ecosystem design can be quickly and relatively easily implemented in a session that may feel like little more than a standard account/questionnaire review.

However, for more complex large scale programmes with multiple, potentially multi-national studies, the simple logistics of getting stakeholders in one place to agree the purpose of each study can be time prohibitive.

Breaking with the past also requires bravery and a necessary leap of faith, particularly where trend data is concerned. Naturally by moving, removing or merging questions, it is inevitable that some trend data will be lost.

For some, the incentive of having a balanced, efficient research ecosystem will merit this temporary pain. For

### The key questions of ecosystem design:

**What do we need to know?**

**When do we need to know it?**

**Do we actually need to ask this?**

others, it will understandably come at too high a cost.

This does not, however, mean that the three key questions of ecosystem design cannot be used going forward, even if it is not possible to implement them retrospectively. This can translate into a simple audit of existing research programmes, resulting in keep/lose/change/add recommendations at a study and/or question level. When combined with a more mindful approach about question placement going forward, these baby steps can lead to a balanced ecosystem in the long run.

## CONCLUSION

Undoubtedly the proliferation of data – from survey or other sources – available to organisations today will continue to grow, and with it the challenges of managing and using that data. Already this has brought about a step change in the way insight is delivered: where once ‘more data, more detail’ was a constant mantra, now smart data that delivers specific insights easily, coherently and upon request is the Holy Grail.

We have therefore reached a tipping point where managing, mapping and sharing data is, for many organisations, as important – if not more so – than obtaining it. New technologies, with EFM just one example of these, offer a variety of ways of achieving this. But as a

consequence, planning how to knit data sources together has grown in importance, otherwise these technologies risk simply presenting us with a wall of numbers.

This is where we believe the ecosystem can help: it is not a universal panacea for insight delivery, but by challenging us to step back and assess what we need to know and when, and then identifying what data is available from non-survey sources to supplement this, it invites us to map where and how our information needs will be met.

In this way it unites different data sources, and through their integration provides us with more holistic insight. But it does this in a transparent and controlled way – putting insight managers back in charge of their data.

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