



Privacy by design: the benefits of putting people in control

AMERICAS EDITION



CONTENTS

INTRODUCTION	
.....	03
CHAPTER ONE	
The benefits for businesses of getting privacy right	10
CHAPTER TWO	
The consequences of getting privacy wrong	21
CHAPTER THREE	
Increasing marketing effectiveness	26
CONCLUSION	
.....	36

INTRODUCTION



This is a critical moment for the internet as we know it. People are managing more of their lives online than ever before. They expect the services they use to earn and be worthy of their trust, by taking care of their personal information. They want to feel in control of the information they share, and that takes more than just access to the tools that give them that control. Ultimately, people want more private online experiences and more positive privacy interactions with brands.

How brands respond to that desire will help define the relationships they have with their customers — because building trust remains essential for any brand that uses online advertising to find new customers and drive growth. So as the internet becomes increasingly privacy-first, advertising must go beyond the basics and beyond what's legally required, to exceed people's privacy expectations.

The findings of this report show that, for brands that can adopt best privacy practices and deliver positive privacy experiences to their customers, there are clear commercial benefits. At the same time, the risks for brands that get privacy wrong — both commercially and in terms of non-compliance — are substantial.

1. Providing a positive privacy experience can increase share of brand preference by 49%.¹
2. Getting the privacy experience wrong has a negative impact on both trust and brand preference.²
3. There are strong privacy practices that brands can deploy to increase feelings of control, and the most effective combinations have a notable positive impact on more than just feelings of control.³

The aim of this report is to help brands give customers control in a way that ensures they feel in control as well

We wanted to build on the key findings from our 2021 [Privacy by design: exceeding customer expectations](#) study, which we carried out across five European countries. For that report, we surveyed over 7,000 people and found that marketing was most effective when people feel their privacy is respected. The results were clear: those who felt in control of their data were two times more likely to find advertising from that company relevant, and three times more likely to react positively to its advertising.⁴

¹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

² Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022.

³ Ibid.

⁴ Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

What do we mean by “feeling” in control?

For customers, feeling in control is about more than just being in control. Privacy tools that allow people to change their cookie preferences and unsubscribe from email marketing can help keep customers in control of their data. But those tools are not enough to provide customers with the more substantial feeling of control that they need to trust a brand. Customers also want to know when, and why, they are sharing their information — and to understand the benefits they will receive from doing so.

In 2022, we carried out further research not only in Europe, but across two regions in the Americas as well: Latin America (Brazil and Mexico); and North America (Canada and the U.S.).⁵ We also interviewed a range of experts from around the world (including data privacy lawyers, private wealth advisors, investment managers, professors, psychiatrists, and behavioral scientists) to better understand how to help people feel in control.⁶ We found people feel less in control than they would like to when interacting with brands. In our Americas study, 76% of participants said they want control over the data they share with companies⁷ — but when we asked how many felt complete control over their data, only 11% said they did.⁸

The goal of this report is to help brands and marketers in the Americas understand the benefits of giving their customers control over their data in a way that ensures they *feel* in control as well — and to provide the tangible actions they can take to deliver control in this way.

⁵ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022.

⁶ Google/Ipsos, U.K., U.S., Australia, France, Germany, Turkey, Japan, Nordics, Brazil, India, How feeling in control is relevant in people's lives, 2022.

⁷ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Think about your usual behavior on the internet, and the data you share with the companies whose websites you visit. How much control do you want to have over this data you share?

⁸ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

In testing different privacy experiences and the practices brands might use to improve those experiences, we found that participants who experienced an increase in feelings of control also indicated they would find marketing more effective, and that it would noticeably increase brand preference and trust.⁹ However, when participants didn't feel in control, they were more likely to be skeptical about the way a brand is handling their data — even a brand they like.¹⁰

For the most part, the findings you see throughout this report refer to the average across all four countries. But in some cases, our findings differed noticeably by region or individual country. We highlight these differences throughout the report only where most relevant, wherever they lead us to draw different conclusions about how people feel about being in control — and what that might mean for the way brands approach privacy.

Despite some regional nuances, the overall picture remains clear: to increase trust and share of brand preference, brands need to get privacy right. A key way to do that is to help people feel in control.¹¹

Put people in control by creating privacy practices that work

The first Privacy by design report introduced the Three Ms framework for creating positive privacy experiences — recommending that every privacy interaction should be Meaningful, Memorable, and Manageable.¹²

⁹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

¹⁰ Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.

¹¹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022.

¹² Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.

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Make it Meaningful

What's in it for the customer?

People will voluntarily share their data with companies that demonstrate a clear value proposition.¹³ Marketers can respond by clearly communicating the benefit of an exchange and anticipating their customers' needs with relevant and timely messages.

*Ninety-one percent of surveyed internet users (aged 16-74) said they were more likely to shop with brands that provide offers and recommendations relevant to them.*¹⁴

Make it Memorable

Conscious permission is a valuable thing

People have a limited understanding of how online privacy works, and that affects the way they feel about advertising. But when they remember the choices they've made about data sharing, they have more positive responses.¹⁵

*The perceived relevance of ads shown increased 7% when participants' data was consciously shared rather than collected via cookies.*¹⁶

Make it Manageable

People expect a sense of control

When people feel they lack control over their personal data, they can become skeptical of digital marketing.¹⁷ Marketers should provide the tools and information people need to manage their privacy.

*Seventy-nine percent of people who feel little or no control over their data are skeptical about how companies use their data (versus 60% among people who do feel they have control).*¹⁸

¹³ Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.

¹⁴ Ipsos, Global, Global Trends 2020, 2020.

¹⁵ Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.

¹⁶ Ibid.

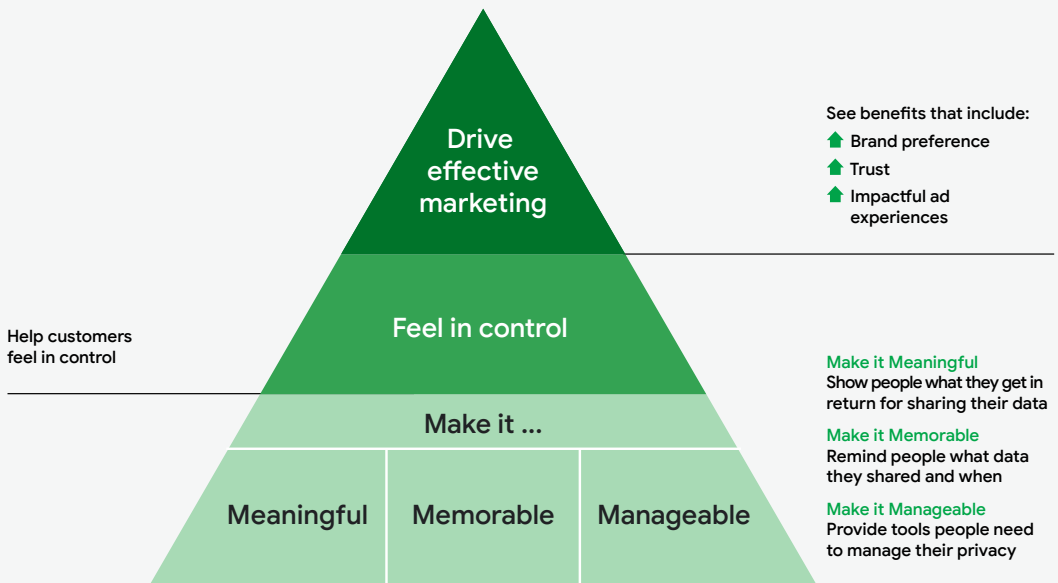
¹⁷ Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.

¹⁸ Ibid.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

This report goes a step further: it offers tangible actions that brands in the Americas can take to bring the Three Ms to life, and help increase people's feeling of control over their data and privacy — which in turn improves marketing effectiveness.

Use the Three Ms to help customers feel in control and drive more effective marketing¹⁹



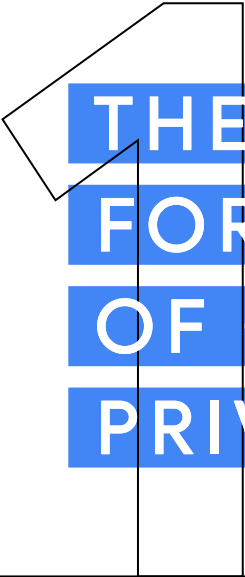
We tested a number of privacy practices, each of which aligned with at least one of the Three Ms — making interactions more Meaningful, Memorable, or Manageable. The most successful combinations we tested in each of the four countries helped to not only maximize feelings of control, but also improved brand trust and preference.

¹⁹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022.
All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)


In the subsequent chapters, we examine the brand benefits of providing people with a feeling of control over their data, before exploring the consequences of getting privacy wrong. We then turn to the concrete steps brands can take to build feelings of control and trust. The majority of these findings are from a series of carefully designed research tasks and experiments that tested people's responses to hypothetical privacy scenarios and modeled results to examine the impact they had (see the Technical Appendix for more detail).

The internet is changing. But the findings of this report give reason for optimism about its privacy-first future. People will benefit from feeling more in control of their data. And for marketers, it's a chance to be proactive about privacy — and forge stronger, longer-lasting relationships with their customers.





THE BENEFITS FOR BUSINESSES OF GETTING PRIVACY RIGHT



KEY INSIGHT

Providing a positive privacy experience can increase share of brand preference by 49%.²⁰

We created both positive and negative privacy scenarios and examined the impact they had on research participants' feelings of control — and therefore on brand preference, trust, and marketing effectiveness. In this chapter, we focus on the impact of the positive privacy scenario.

²⁰ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?
All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

How we defined a positive privacy experience

We defined a positive scenario as one that actively gave participants control and choice over their data. For example, in the hypothetical scenario that was presented to participants, we enabled people to manage cookie preferences or choose which elements of their personal data a brand could store and for how long. In the positive test, it was made clear to participants how their data was being used, with reassurances that it would be protected and not shared with third parties.

“The information shown [in the positive privacy scenario] makes me think the company is being careful by asking the person to review their data. I would be surprised at the sincerity but glad they shared it.”²¹

PARTICIPANT, BRAZIL, 44

“I would like a company to proactively tell me about how I can control my data-sharing settings versus me having to find this section on my own. This would make me feel a company is ethical and cares about transparency. I think being able to control how much or how little information I share with the company and third parties is a must.”²²

PARTICIPANT, U.S., 33

²¹ Google/Ipsos, Brazil, qualitative deep dive, n=24 participants, June 2022.

²² Google/Ipsos, U.S., qualitative deep dive, n=24 participants, June 2022.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

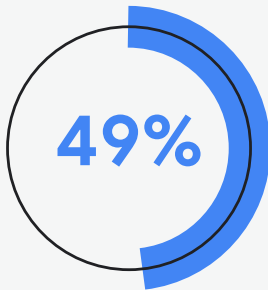
People are more likely to choose brands that make them feel in control

We found that the feeling of control bears significant influence on brand preference; 81% of people said they preferred to buy from brands that are honest about what data they collect and why, rising to 89% among those who described themselves as skeptical about the data brands collect and the ways in which they use it.²³

One of the most striking outcomes of the test was that, in response to a positive privacy experience with a second-choice brand, 49% of participants across the four countries in the Americas said they would choose to switch from their preferred brand to their second-choice brand.²⁴

FIGURE 01

The impact of a positive privacy experience on share of brand preference²⁵



After a positive privacy experience with their second-choice brand, 49% of people said they would switch from their preferred brand to the second-choice brand

²³ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000, high skepticism n=6,952, online participants aged 18-70, July 2022. Q. To what extent do you agree or disagree with the following statements? Agree — I prefer to buy from brands that are honest about what personal data they collect and why.

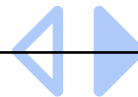
²⁴ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

²⁵ Ibid.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

Drilling down into each country specifically, this finding holds true: 45% of participants in Canada said they would make the same switch,²⁶ rising to 48% among those in the U.S.,²⁷ 49% among those in Mexico,²⁸ and 53% among those in Brazil.²⁹

These findings were also broadly consistent, by country, across several different industry sectors.³⁰ We saw that the impact of a positive privacy experience on preference for a second-choice brand was strongest in Travel, where 58% of customers, on average, said they would choose to switch their brand preference away from their previous first-choice brand. Even in Retail, where the impact of a positive privacy experience on brand preference was least pronounced, 43% of customers still preferred what had until then been their second-choice brand, following a positive privacy experience.³¹



²⁶ Google/Ipsos, Canada, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

²⁷ Google/Ipsos, U.S., Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

²⁸ Google/Ipsos, Mexico, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

²⁹ Google/Ipsos, Brazil, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

³⁰ Verticals tested: Retail, Travel, Insurance, Consumer Packaged Goods, and Telco.

³¹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000, Travel, Insurance, CPG, Telco, Retail – n=8,000 each, online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

Feelings of control can earn trust from skeptical customers

The positive privacy scenarios we tested didn't just impact brand preference — there was also an 11% uplift in the number of participants who said they would trust a brand with their data. This uplift was even more pronounced among customers who were initially more skeptical about the way brands use their data for marketing. Of these more skeptical customers, positive privacy scenarios led to a 16% uplift in the number of participants who said they would trust a brand with their data.³² This is notable for brands marketing in the Americas, given that base-level skepticism was high among participants from all four markets (68% on average).³³

On a regional level, however, we did see differences in the extent of the impact that positive privacy experiences had on trusting a brand with data. In **Canada** and **the U.S.**, we saw a significantly greater impact on brand trust when participants were exposed to a positive privacy experience.³⁴ Our research showed that both these countries had a lower base level of brand trust than **Brazil** and **Mexico**: just 50% of participants in Canada and the U.S. said they had trust in brands, compared to 70% and 67% in Brazil and Mexico, respectively. Therefore, the opportunities for brands to grow that trust were greater — through better privacy experiences, by deploying the most effective combinations of privacy practices outlined in Chapter Three.

³² Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000, high skepticism n=6,952, online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree — I would trust this brand with my personal data.

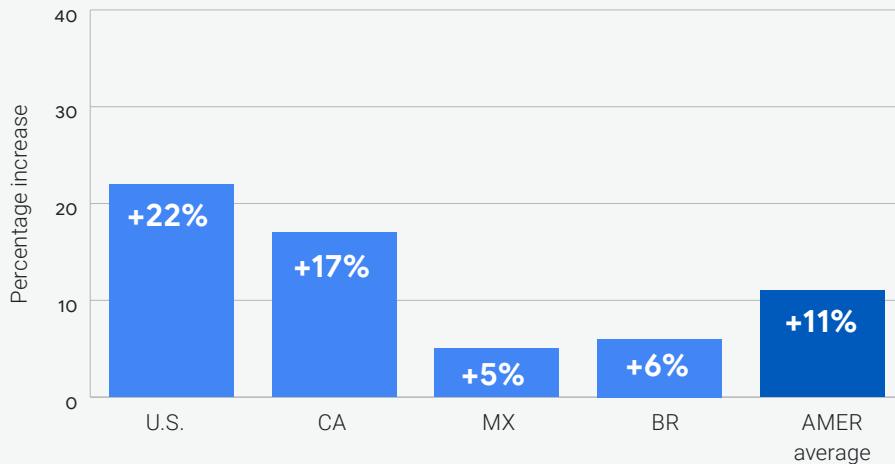
³³ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000, online participants aged 18-70, July 2022. Q. To what extent do you agree or disagree with the following statements? I feel skeptical about the ways companies use my data in marketing.

³⁴ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, Brazil n=2,000, Mexico n=2,000, Canada n=2,000, U.S. n=2,000, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree — I would trust this brand with my personal data.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

FIGURE 02

The impact of a positive privacy experience on "trust brand with my data"³⁵



Even as the web evolves, the fundamentals of brand building remain largely unchanged. Strong relationships between brands and customers must begin with trust. And with regards to online data privacy, our results show that building trust can even help individuals who are initially cautious become more comfortable with sharing their data.³⁶

³⁵ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, Brazil n=2,000, Canada n=2,000, Mexico n=2,000, U.S. n=2,000, July 2022. Q. To what extent do you agree with the following statement? Agree – I would trust this brand with my personal data. Q. Given the scenario you just saw, to what extent do you agree with the following statement? Agree – I would trust this brand with my personal data.

³⁶ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000, high skepticism n=5,483, online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

Positive privacy experiences can also help improve ad relevance and effectiveness

Our research suggests that helping people feel in control of their data can also encourage more positive emotional responses to the ads they're shown, and increase the perceived relevance of the ads being shown.³⁷

“[When companies offer positive privacy experiences] I read ads with more interest because I know they will bring something important to me.”³⁸

PARTICIPANT, MEXICO, 27



³⁷ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022.

³⁸ Google/Ipsos, Mexico, qualitative deep dive, n=24 participants, June 2022.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

We wanted to test the extent to which this held true across different industries, so we looked at how the most effective combination of privacy practices in each country³⁹ impacted ad experiences in the Telco, Insurance, Consumer Packaged Goods (CPG), Retail, and Travel sectors. On average, we saw the biggest uplifts in ad relevance in Insurance and the biggest uplifts in feelings of positivity in Telco.⁴⁰ However, the greatest impact by vertical, and the size of that impact, did vary across each of the four markets.



In **Brazil**, the biggest uplift in ad relevance was seen in Insurance (+5%) and the biggest uplift in positive emotional response was seen in Telco (+6%).⁴¹



In **Mexico**, the biggest uplift in ad relevance was seen in Retail (+2%) and the biggest uplift in positive emotional response was seen in Telco (+7%).⁴²



In **Canada**, the biggest uplift in ad relevance was seen in CPG (+10%) and the biggest uplift in positive emotional response was seen in Insurance (+52%).⁴³



In **the U.S.**, the biggest uplift in ad relevance was seen in Insurance (+12%) and the biggest uplift in positive emotional response was seen in Telco (+23%).⁴⁴

We also found that participants who were more aware of how data sharing works were, on average, 31% more likely to agree that data sharing in return for more relevant ads represents a fair value exchange.⁴⁵ This suggests that brands should not simply approach privacy in terms of their minimum legal obligations, but go above and beyond: clearly articulating to people why they are asking for data and how they intend to use it. Namely, to deliver more helpful, relevant, and engaging experiences.

³⁹ Asking for consent before personalizing data, providing privacy setting reminders, and sending a privacy email digest in Canada and the U.S.; asking for consent before personalizing data, providing privacy setting reminders, and reminding people why they are seeing an ad/offer in Brazil and Mexico.

⁴⁰ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, total n=8,000, Travel, Insurance, CPG, Telco, Retail – n=8,000 each, online participants aged 18-70, July 2022. Q. How relevant would this ad be for you? Q. Which word describes best how you feel after seeing this ad? (Positive net.)

⁴¹ Google/Ipsos, Brazil, Privacy by design: the benefits of putting people in control, total n=2,000, Travel, Insurance, CPG, Telco, Retail – n=2,000 each, online participants aged 18-70, July 2022. Q. How relevant would this ad be for you? Q. Which word describes best how you feel after seeing this ad? (Positive net.)

⁴² Google/Ipsos, Mexico, Privacy by design: the benefits of putting people in control, total n=2,000, Travel, Insurance, CPG, Telco, Retail – n=2,000 each, online participants aged 18-70, July 2022. Q. How relevant would this ad be for you? Q. Which word describes best how you feel after seeing this ad? (Positive net.)

⁴³ Google/Ipsos, Canada, Privacy by design: the benefits of putting people in control, total n=2,000, Travel, Insurance, CPG, Telco, Retail – n=2,000 each, online participants aged 18-70, July 2022. Q. How relevant would this ad be for you? Q. Which word describes best how you feel after seeing this ad? (Positive net.)

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⁴⁵ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. To what extent do you agree or disagree with the following statements? Agree – For me, sharing my data online (e.g. location, age, browsing data) in order to get personalized ads is a fair deal.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

“I see credibility and responsibility towards the users [when a company provides a positive privacy experience]. I would feel more confident sharing my information without fear, which is very important to me.”⁴⁶

PARTICIPANT, BRAZIL, 27

Adding a monetary incentive to a positive privacy experience isn't an automatic shortcut to privacy success

In addition to testing the impact of a positive privacy experience on its own, we also set up a further scenario. In this second scenario, participants were shown a positive privacy experience that also offered a personalized discount in return for sharing their data (for example, during signup or onboarding experiences). It might be surprising to hear that, for brands with good privacy practices already in place, we found this additional incentive largely did nothing to further improve brand preference. And in the case of brand trust, an additional monetary incentive actually had a negative impact (-3% points).⁴⁷ The main takeaway for brands from this? That it's essential to first have good privacy practices in place before considering monetary incentives — and in Chapter Three we explore, in detail, which practices are most effective for each market.

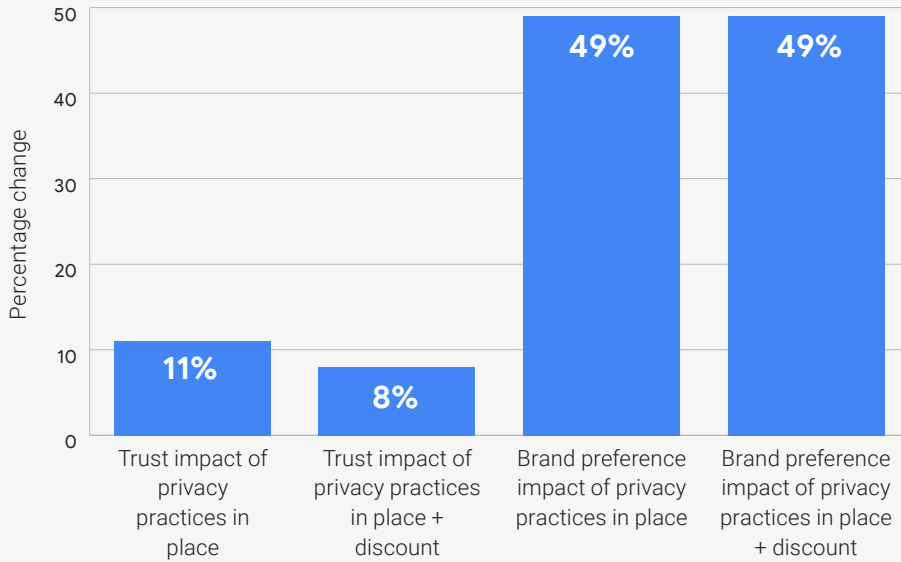
⁴⁶ Google/Ipsos, Brazil, qualitative deep dive, n=24 participants, June 2022.

⁴⁷ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree — I would trust this brand with my personal data. Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

FIGURE 03

The impact of a good privacy experience on trusting a brand with personal data and brand preference, with and without an additional monetary incentive⁴⁸



⁴⁸ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data. Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

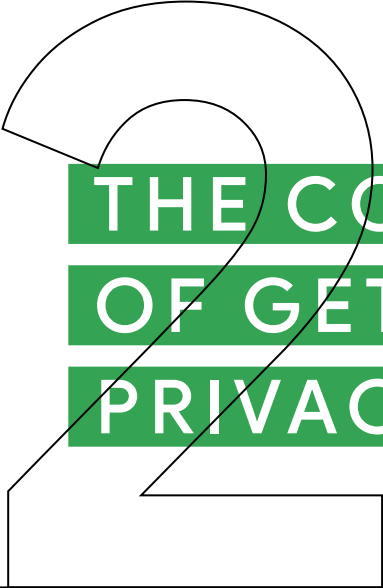
All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

The key learnings from this chapter

- Positive privacy experiences provide an opportunity to build trust with customers and increase marketing effectiveness.
- Discounts may not provide the obvious incentive to share information that one might expect.

Next, we'll take a closer look at the negative privacy experiences we tested and the consequences of getting privacy wrong.





THE CONSEQUENCES OF GETTING PRIVACY WRONG



KEY INSIGHT

Getting the privacy experience wrong has a negative impact on both trust and brand preference.⁴⁹

In Chapter One, we explored how positive privacy scenarios can have a beneficial impact on trust, preference, and marketing effectiveness. We now turn to the results of two tests we conducted to assess the impact of negative privacy scenarios. Both of the hypothetical negative experiences that we created and tested restricted people's control over how their data would be used and managed.

The tests revealed that the negative impact of a poor privacy experience was considerable for participants across all four countries — and severe enough to suggest that brands cannot afford to think about data only in terms of security. When comparing the results of a test that showed participants poor privacy practices with a test that suggested a brand's IT system had been hacked and personal data exposed due to poor data management, we can conclude that privacy demands almost as much attention from brands as data security.

“Even if they give us greater security, fear will always be present, so what perhaps gave me greater confidence was where they gave examples of changes for greater security and protection of my data.”⁵⁰

PARTICIPANT, BRAZIL, 44

When customers were exposed to a hypothetical negative privacy experience, their brand trust for handling personal data decreased by 32%. The same metric increased by only 11% when customers were exposed to a positive experience.⁵¹



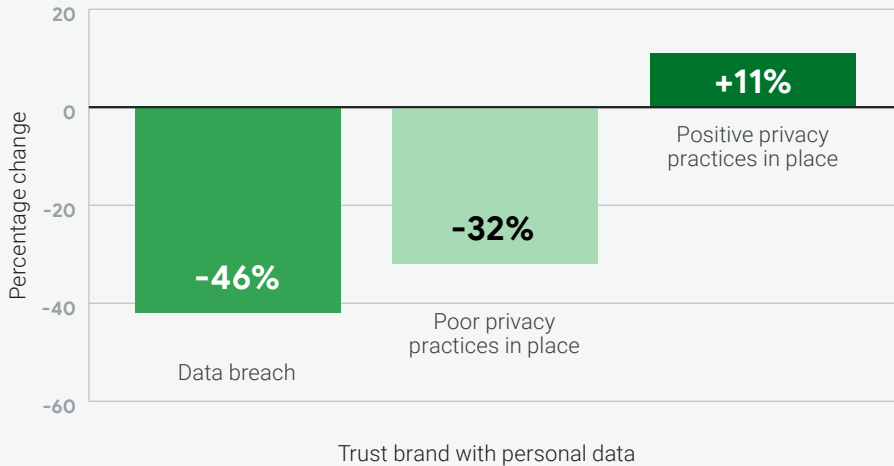
⁵⁰ Google/Ipsos, Brazil, qualitative deep dive, n=24 participants, June 2022.

⁵¹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree — I would trust this brand with my personal data.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

FIGURE 04

The impact of poor data security and poor data privacy on trusting a brand with personal data⁵²



It's also worth noting here that, while the impact of the negative data security experience and negative data privacy experience were broadly similar across each of the four countries, the 11% average uplift in trust from a positive privacy experience obscures some noticeable differences between results in the Latin American and North American countries we tested.



In **Brazil** and **Mexico**, we saw the “trust this brand with my data” metric increase by 6% and 5% respectively.⁵³



In **Canada** and **the U.S.**, we saw the “trust this brand with my data” metric increase by 17% and 22% respectively.⁵⁴

⁵² Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data.

⁵³ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, Brazil n=2,000, Mexico n=2,000, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data.

⁵⁴ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, Canada n=2,000, U.S. n=2,000, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data.

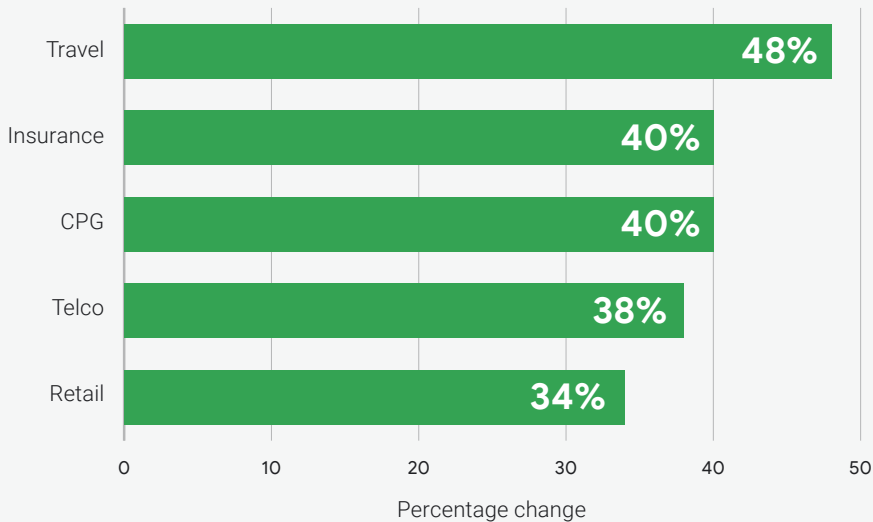
All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

The consequences of negative privacy experiences extend to brand selection as well

Forty percent of our participants claimed they would switch brand loyalties (from a preferred brand to a second-choice brand) in response to a negative privacy experience with their preferred brand.⁵⁵

FIGURE 05

Significant percentages of customers would switch to their second-choice brand after a negative privacy experience⁵⁶



⁵⁵ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, total n=8,000, Travel, Insurance, CPG, Telco, Retail – n=8,000 each, online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

⁵⁶ Ibid.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

When testing these experiences by industry, we saw the biggest switch, on average, in Travel: 48% of participants indicated they would switch from their preferred Travel brand to their second-choice brand after a negative privacy experience. Even in Retail, which recorded the lowest switch in the test, a significant 34% of participants indicated that they would switch brands.⁵⁷

The key learnings from this chapter

- Data breaches, inevitably, have a severe impact on customers trusting a brand with their information.
- But when participants were faced with poor privacy interactions around information-sharing, the damage was also notable.
- For example, 40% of participants claimed they would switch from a preferred to second-choice brand after a negative privacy experience.

In the next chapter, we'll look at what brands can do to increase feelings of control, build trust, and, ultimately, increase marketing effectiveness.



⁵⁷ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, total n=8,000, Travel, Insurance, CPG, Telco, Retail — n=8,000 each, online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)



INCREASING MARKETING EFFECTIVENESS



KEY INSIGHT

There are strong privacy practices that brands can deploy to increase feelings of control, and the most effective combinations have a notable positive impact on more than just feelings of control.⁵⁸

In 2021, we carried out research in Europe that found brands could create more positive privacy experiences for their customers if they made those experiences more [Meaningful, Memorable, and Manageable](#) (take another look at the Introduction in this report for a reminder of what we mean by these three terms).⁵⁹

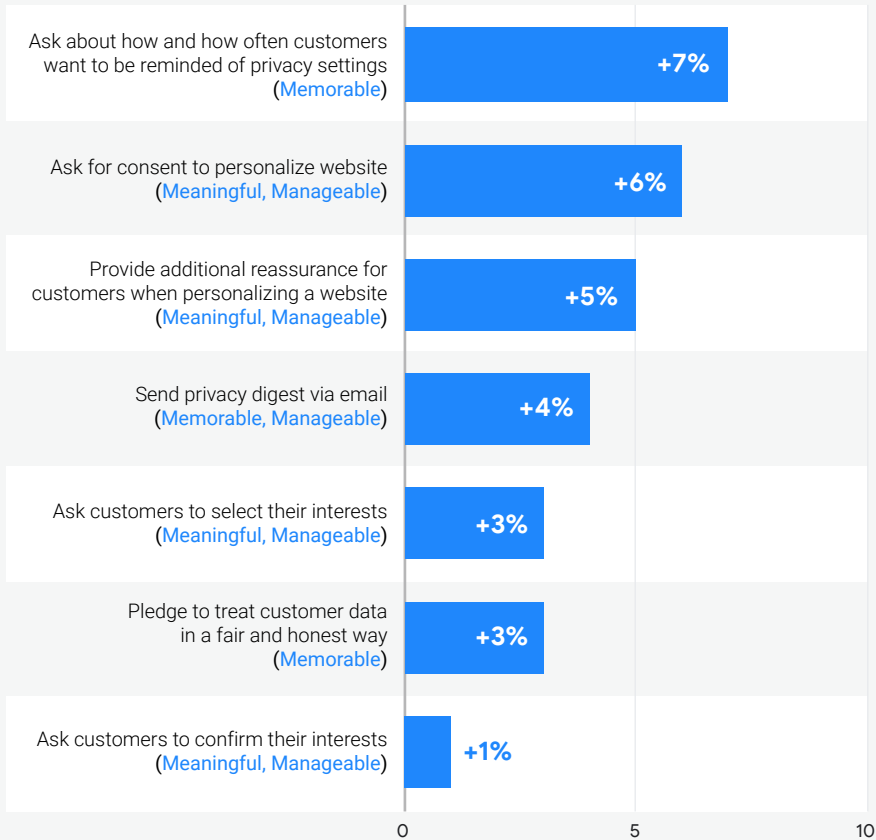
For this report, we wanted to build on the Three Ms framework to identify a series of actionable, privacy-preserving practices. Each practice corresponds to at least one M – Meaningful, Memorable, or Manageable – and we tested each practice in each country, in each country’s primary language, to see how effectively it delivered a greater feeling of control.



⁵⁹ Google/Ipsos, France, Germany, Netherlands, U.K., Privacy by design: exceeding customer expectations, n=7,200 online participants aged 18-70, Sept. 2021.
All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

FIGURE 06

Privacy practices that tap into the Three Ms deliver increased feelings of control⁶⁰



⁶⁰ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?; This table shows the seven most effective privacy practices tested; please refer to the Technical Appendix for a full list of all practices tested.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

A closer look at the impact of these practices, by country

The findings above show the average impact of the most notable selection of practices across the four countries we tested, but we also wanted to more closely explore the findings by individual country. By considering the regional differences we found, and the patterns that emerge, brands can better tailor their approach.

While many of the privacy practices we tested in **Brazil** and **Mexico** had a positive impact on feelings of control, that impact was less pronounced than in **Canada** and **the U.S.**⁶¹ Given this, brands should pay particular attention to how they combine the most effective privacy practices for the greatest positive impact in the country they're marketing to — not only on feelings of control and trust, but in pursuit of other benefits as well (something we'll go on to look at later in this chapter).

+9%



In **Brazil**, asking for consent to personalize a website, asking how and how often to remind customers about their privacy settings, and reminding people why they are receiving a personalized ad/offer led to a 9% uplift in feelings of control.⁶²

+11%



In **Mexico**, asking for consent to personalize a website, asking how and how often to remind customers about their privacy settings, and reminding people why they are receiving a personalized ad/offer led to an 11% uplift in feelings of control.⁶³

⁶¹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, Brazil n=2,000, Canada n=2,000, Mexico n=2,000, U.S. n=2,000, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

⁶² Google/Ipsos, Brazil, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

⁶³ Google/Ipsos, Mexico, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

+43%



In **Canada**, asking how and how often to remind customers about their privacy settings, asking for consent to personalize a website, and sending a privacy digest via email led to a 43% uplift in feelings of control.⁶⁴

+24%



In **the U.S.**, asking how and how often to remind customers about their privacy settings, asking for consent to personalize a website, and sending a privacy digest via email led to a 24% uplift in feelings of control.⁶⁵

Regardless of which country you're marketing to, make consent prompts simple and easy to understand

While asking people for consent to personalize website content is a legal requirement in many places, our research indicates the benefits of doing so for both customers and brands. In all four countries we looked at, asking for consent was either the most effective or second-most effective practice in terms of increasing feelings of control. Ensuring that consent is asked for in clear, concise language helps people feel they have agency over their privacy — and can act as the gateway for a mutually respectful data exchange.

⁶⁴ Google/Ipsos, Canada, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

⁶⁵ Google/Ipsos, U.S., Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

“I truly want to know exactly what you are doing with my information. Just be straightforward, use point form and plain English. Constantly asking me to read 10 pages of terms and conditions is not only suspicious but also intrusive.”⁶⁶

PARTICIPANT, CANADA, 66

“A clear explanation helps me understand the process and gives me much more confidence to continue browsing. I believe all companies [should provide this], regardless of size.”⁶⁷

PARTICIPANT, BRAZIL, 27

Combining the most effective practices in each country can have a positive impact on more than just feelings of control

So far, we have looked at the impact individual privacy practices can have on people’s feelings of control. But we also wanted to see what happened when we combined the three most effective practices in each country. The results showed that, in all four countries, the right combinations of practices didn’t solely lead to an increase in feelings of control — they also led to increases in trust with personal data, positive emotional response to ads shown, and perceived relevance of ads shown.⁶⁸

⁶⁶ Google/Ipsos, Canada, qualitative deep dive, n=24 participants, June 2022.

⁶⁷ Google/Ipsos, Brazil, qualitative deep dive, n=24 participants, June 2022.

⁶⁸ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree — I would trust this brand with my personal data. Q. Which word describes best how you feel after seeing this ad? (Positive net.) Q. How relevant would this ad be for you?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)



In **Brazil**, the three most effective privacy practices:*

- Increased feelings of control by **9%**
- Increased trust with personal data by **5%**
- Increased positive emotional response to ads shown by **4%**
- Increased perceived relevance of ads shown by **4%**⁶⁹

**asking for consent to personalize a website, asking how and how often to remind customers about their privacy settings, and reminding people why they are receiving a personalized ad/offer*



In **Mexico**, the three most effective privacy practices:*

- Increased feelings of control by **11%**
- Increased trust with personal data by **1%**
- Increased positive emotional response to ads shown by **5%**
- Increased perceived relevance of ads shown by **1%**⁷⁰

**asking for consent to personalize a website, asking how and how often to remind customers about their privacy settings, and reminding people why they are receiving a personalized ad/offer*



In **Canada**, the three most effective privacy practices:*

- Increased feelings of control by **43%**
- Increased trust with personal data by **15%**
- Increased positive emotional response to ads shown by **48%**
- Increased perceived relevance of ads shown by **9%**⁷¹

**asking how and how often to remind customers about their privacy settings, asking for consent to personalize a website, and sending a privacy digest via email*

⁶⁹ Google/Ipsos, Brazil, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]? Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data. Q. Which word describes best how you feel after seeing this ad? (Positive net.) Q. How relevant would this ad be for you?

⁷⁰ Google/Ipsos, Mexico, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]? Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data. Q. Which word describes best how you feel after seeing this ad? (Positive net.) Q. How relevant would this ad be for you?

⁷¹ Google/Ipsos, Canada, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]? Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data. Q. Which word describes best how you feel after seeing this ad? (Positive net.) Q. How relevant would this ad be for you?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)



In **the U.S.**, the three most effective privacy practices:*

- Increased feelings of control by **24%**
- Increased trust with personal data by **11%**
- Increased positive emotional response to ads shown by **18%**
- Increased perceived relevance of ads shown by **11%**⁷²

**asking how and how often to remind customers about their privacy settings, asking for consent to personalize a website, and sending a privacy digest via email*

The most effective combinations of practices also had a positive impact in every industry, in all four countries

When testing the most effective combinations of privacy practices, we also wanted to see their impact in specific industries. In each country, we measured impact for the following verticals: Telco, CPG, Travel, Insurance, and Retail. In every country, for every vertical, we saw a notable rise in feelings of control.⁷³



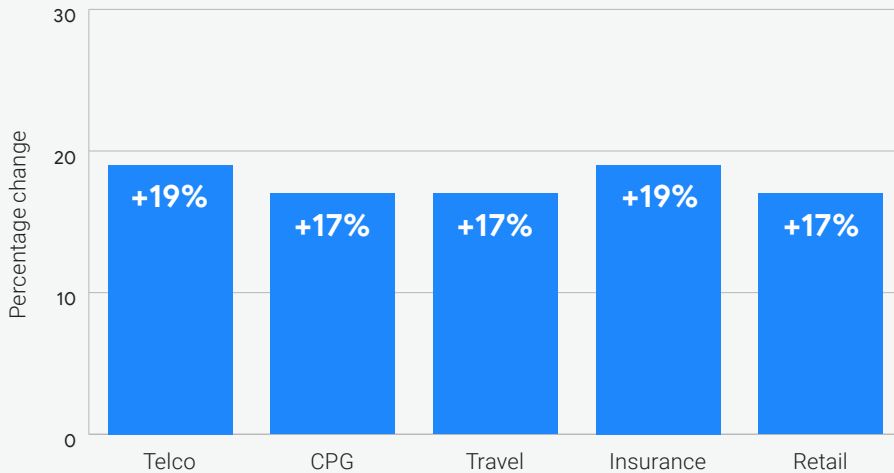
⁷² Google/Ipsos, U.S., Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]? Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree – I would trust this brand with my personal data. Q. Which word describes best how you feel after seeing this ad? (Positive net.) Q. How relevant would this ad be for you?

⁷³ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, total n=8,000, Travel, Insurance, CPG, Telco, Retail – n=8,000 each, online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

FIGURE 07

The most impactful Three Ms practices on feelings of control across all verticals tested*⁷⁴



*see pages 29-30 for most impactful combinations of practices in each country tested

Combining privacy practices can reassure even the most skeptical audiences. Some customer segments experience a lower feeling of control over their data than others. Our study showed that those aged between 50 and 70 years old tend to feel the least in control when they're online.⁷⁵ However, when we tested the impact of our most effective combination of Three Ms practices, we found that research participants in this age group were more likely to report an uplift in feelings of control than participants in any other group.⁷⁶ Testing the same combination of practices, we also saw a 29% uplift among those who didn't initially trust a brand.⁷⁷

⁷⁴ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, total n=8,000, Travel, Insurance, CPG, Telco, Retail – n=8,000 each, online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

⁷⁵ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, 50-70-year-olds n=2,735, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

⁷⁶ Ibid.

⁷⁷ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, low initial brand trust n=2,467, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

There's more than one way to combine Three M practices for an increase in feelings of control

Of all the combinations of practices we tested, almost any combination that resulted in a Meaningful, Memorable, and Manageable experience had a more positive impact than combinations that only tapped into one or two Ms.⁷⁸ The only exception to this was in Brazil, where we saw no discernible difference in the impact on feelings of control between the application of the three most effective practices (corresponding to three Ms) and the application of the two most effective practices (corresponding to two Ms). In both cases, the two- and three-practice combinations led to a total uplift of 9%.⁷⁹

The key learnings from this chapter

- Different combinations of privacy-first practices based on the Three Ms can increase people's feelings of control, trust, and ad impact.
- The most effective combinations of practices — and the level of impact they have — might vary by country and industry ...
- ... but the findings are clear that good privacy practices make a positive difference across the board.

⁷⁸ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

⁷⁹ Google/Ipsos, Brazil, Privacy by design: the benefits of putting people in control, n=2,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)



CONCLUSION



Our intention with this report is to show just how important it is for brands to bring privacy to the forefront of their online marketing approach. People prefer to see relevant and useful ads, and they are open to sharing their data with brands — but they want to feel in control when they do it.⁸⁰ Enhancing the feeling of control that people have over their data is a powerful way for brands to build trust, increase marketing effectiveness, and get better results.

⁸⁰ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. To what extent do you agree or disagree with the following statements? Agree — For me, sharing my data online (e.g. location, age, browsing data) in order to get personalized ads is a fair deal.

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

Let's recap our findings.

1. Providing a positive privacy experience can increase share of brand preference by 49%.⁸¹

After a positive privacy experience with their second-choice brand, 49% of people said they would switch from their preferred brand to the second-choice brand.

2. Getting the privacy experience wrong has a negative impact on both trust and brand preference.⁸²

For many of our participants, privacy experiences that lacked transparency or failed to provide knowledge and/or autonomy for the customer were severely damaging to brand trust and preference.

3. There are strong privacy practices that brands can deploy to increase feelings of control, and the most effective combinations have a notable positive impact on more than just feelings of control.⁸³

For the biggest positive impact on feelings of control, brands should deploy a proven combination of practices that create Meaningful, Memorable, and Manageable privacy experiences.

Any privacy journey needs to start with a deep understanding of what people want. We've seen how, in many countries around the world, people want a feeling of control over the data they share. The ability to manage data preferences is often not enough on its own. They want and expect experiences that are Meaningful, Memorable, and Manageable.⁸⁴

Our study suggests brands that can offer these experiences will, over time, see a positive snowball effect — people will feel in control, which increases brand trust and boosts brand preference.⁸⁵ Brands that neglect privacy risk the opposite scenario. The path to success is clear: adopt practices based on the Three Ms to give people a feeling of control and improve marketing effectiveness.

⁸¹ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Which brand would be your first choice the next time you are looking to buy [CATEGORY]? Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

⁸² Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022.

⁸³ Ibid.

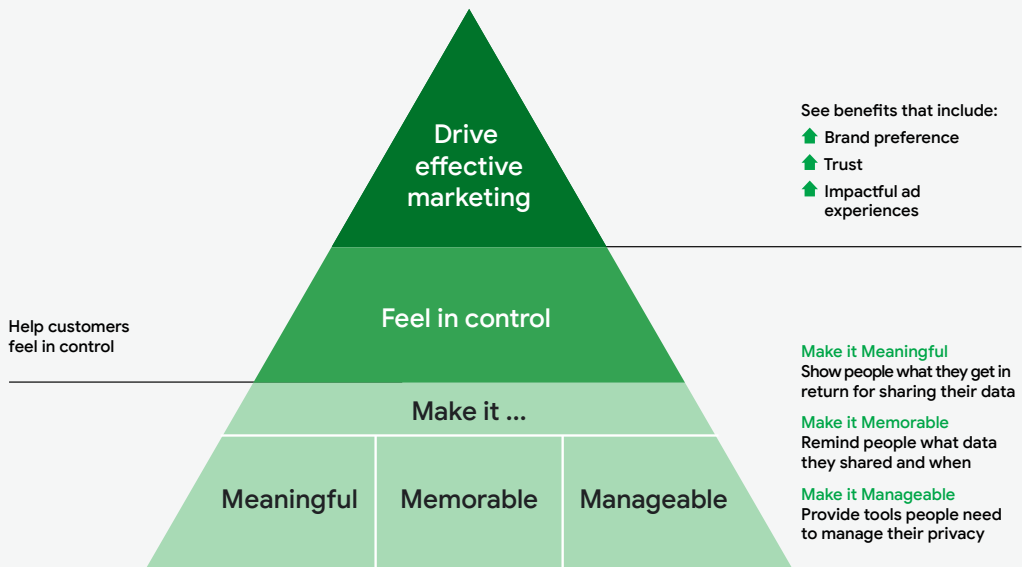
⁸⁴ Ibid.

⁸⁵ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. Q. Given the scenario you just went through, to what extent do you feel you have control over the data you share with [BRAND]? Q. Given the scenario you just saw, to what extent do you agree or disagree with the following statement for [BRAND]? Agree — I would trust this brand with my personal data. Q. Given the scenario you just saw, which brand would be your first choice the next time you are looking to buy [CATEGORY]?

All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

We believe the future of marketing will be shaped to a large extent by these win-win exchanges. Equipped with practices informed by the Three Ms, brands should go beyond basic privacy requirements and provide experiences that are both ethical and effective — exceeding their customers' privacy expectations while driving better marketing results.

Use the Three Ms to help customers feel in control and drive more effective marketing⁸⁶



⁸⁶ Google/Ipsos, Brazil, Canada, Mexico, U.S., Privacy by design: the benefits of putting people in control, n=8,000 online participants aged 18-70, July 2022. All references to percent changes are the proportional increase/decrease in the number of participants giving the specified responses (not percentage point changes)

Technical appendix

Privacy by design

Google commissioned Ipsos to conduct studies across Brazil, Canada, Mexico, and the U.S. in 2022, building on the 2021 report Privacy by design: exceeding customer expectations. Alongside original quantitative and qualitative work, our analysis includes insights from other Ipsos studies and a literature review. Our aim was to develop an objective and customer-centric view of online privacy in digital marketing, to explore the concept of “feeling in control,” to understand the connections between privacy-first principles and marketing effectiveness, and to identify tangible privacy-first actions for brands wanting to enhance the customer experience. To accomplish this with the Privacy by design: the benefits of putting customers in control workstream in 2022 specifically, we conducted a set of four different research methodologies across the four countries. These methodologies are outlined in detail in the following paragraphs.

1. Cultural attitudes toward control

The first part of our study sought to understand the cultural factors influencing people’s desire for control, trust, and empowerment. To do this, we conducted interviews with nine experts in areas such as psychology and behavioral science, across the European, Americas, and Asia-Pacific countries, to understand their professional views on control. We also carried out an analysis of Ipsos proprietary data and other publicly available studies and papers. This work helped to identify topics to focus on in our study’s qualitative phase.

2. Qualitative deep dives

Two-week-long qualitative deep dives in an online community platform, exploring digital marketing experiences in relation to data sharing and feelings of control. These provided a test environment for materials and questions that were later included in our quantitative studies.

Audience surveyed:

Men and women aged 18-70 from Brazil, Canada, Mexico, and the U.S. General population was surveyed online to be representative of age, gender, and region for internet users in each country.

Sample size:

N=24 participants per country.

Sampling methodology:

Qualitative recruitment.

Fieldwork date:

June 2022.

Method of data collection:

Online qualitative community, mini-groups, and in-depth interviews, videoed for 60 minutes each.

4. Quantitative conjoint experiment

Our core focus was to identify specific practices that could be deployed by marketers to influence feelings of control. This study used an experimental quantitative choice-based conjoint (CBC) approach and tested over 190 pieces of stimulus per country. Participants were exposed to a carefully selected series of different online journeys in a mock-up digital environment. After each exposure, we asked participants questions to measure emotional reaction, ad relevance, impact on brand trust, and, most importantly, how much control they felt over their data.

We subsequently used this data to train a model that allowed us to isolate and quantify the impact of different practices on feeling in control for each individual in our sample. To do this, we leveraged hierarchical Bayes (HB) estimation to produce individual-level estimates of utilities for each level of each attribute. This method has been widely validated and is known to improve the accuracy of simulations and lead to better understanding of structure and attribute importance than alternative methods. Using this method enabled us to predict participants' reactions to any combination of interventions and simulate over 80,000 different scenarios to understand optimal combinations under different circumstances (for example, different markets, verticals, audiences).

For each vertical, we tested these practices in different variations

Sign up	Account privacy	Reminder	Marketing communications	Personalization	Educational ad exposure
<ul style="list-style-type: none"> • No intervention • Privacy pledge • Consent to personalize website content • Additional reassurances 	<ul style="list-style-type: none"> • No account privacy settings • Ask about reminders • Select interests • Preferred communication experience 	<ul style="list-style-type: none"> • No reminder • Reminder pop-up • Email privacy digest 	<ul style="list-style-type: none"> • Ad on news website • Website experience • Email communication 	<ul style="list-style-type: none"> • Personalized message • Generic message 	<ul style="list-style-type: none"> • No intervention • Icon + "why this ad/email" (as per marketing communications option)

Audience surveyed:

Men and women aged 18-70 from Brazil, Canada, Mexico, and the U.S. General population was surveyed online to be representative of age, gender, and region for internet users in each country.

Sample size:

N=8,000 participants (n=2,000 per country in Brazil, Canada, Mexico, and the U.S.).

Fieldwork dates:

Brazil: July 8–19, 2022.

Canada: July 5–14, 2022.

Mexico: July 8–21, 2022.

U.S.: June 30–July 7, 2022.

Method of data collection:

Online, sample recruited from online panels.

Data weighting:

Weighted to nationally representative profile for internet users (aged 18–70).

5. Quantitative experimental design

This study used an experimental quantitative approach involving four short videos shown in an online questionnaire. The videos depicted the following scenarios intended to affect participants' feelings of control:

- A negative data security experience, in which a brand suffered a data breach.
- A negative data privacy experience, in which a brand failed to offer its customers control over the data they shared, was not transparent about how the data would be used, and was unclear about how long it would be stored.
- A positive data privacy experience, in which a brand offered customers control over which data they shared, was transparent about how long the data would be stored, and pledged that the data would not be shared with third parties.
- A positive data privacy experience, in which a brand offered the same privacy experience described immediately above, and also offered personal discounts in exchange for customers sharing their data.

Our core objective in this experiment was to understand the effect of these four scenarios on marketing effectiveness (operationalized as brand preference) and trust. To do this, we modeled the relationship between different behavioral and attitudinal metrics and various brand KPIs to understand how different experiences online can affect or change those relationships. We leveraged an enhanced Bayesian network approach that allowed us to go beyond correlations and establish causal relationships between variables to understand underlying structures and direction of flows between the metrics.

Audience surveyed:

Men and women aged 18-70 from Brazil, Canada, Mexico, and the U.S. General population was surveyed online to be representative of age, gender, and region for internet users in each country.

Sample size:

Experimental design, n=8,000 participants (n=2,000 per country in Brazil, Canada, Mexico, and the U.S.).

Sampling methodology:

Quota sampling, based on online representativity.

Fieldwork dates:

Brazil: July 8–19, 2022.

Canada: July 5–14, 2022.

Mexico: July 8–21, 2022.

U.S.: June 30–July 7, 2022.

Method of data collection:

Online, sample recruited from online panels.

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Data Ethics Study: Data Ethics and Effectiveness

A 2021 pan-European study using an experimental quantitative approach to model and map claimed versus actual behaviors. Participants were in the U.K., Germany, France, and the Netherlands, with 1,800 18-70-year-olds in each market, split into two samples — 1,500 answering about ethics and 300 answering about effectiveness. Data from the study was used to create a predictive model that allowed us to isolate the effect of each attribute and test 70,000 different combinations. Even though we cannot test the statistical significance of those results, we managed to simulate around 70,000 potential scenarios and detected patterns that gave us confidence that the observed effects exist.

Audience surveyed:

Men and women aged 18-70 from the U.K., Germany, France, and the Netherlands. General population was surveyed online to be representative of age, gender, and region for internet users in each country.

Sample size:

Part 1: Data ethics, n=6,000 participants (n=1,500 per country).

Part 2: Effectiveness, n=1,200 participants (n=300 per country).

Sampling methodology:

Quota sampling, based on online representativity.

Fieldwork dates:

Part 1 (Data Ethics):

U.K.: May 31–June 3, 2021.

France: June 9–10, 2021.

Germany: June 9–15, 2021.

The Netherlands: June 9–15, 2021.

Part 2 (Effectiveness):

U.K.: June 15–17, 2021.

France: June 22–23, 2021.

Germany: June 22–23, 2021.

The Netherlands: June 22–23, 2021.

Method of data collection:

Online, sample recruited from online panels.

Data weighting:

Weighted to nationally representative profile for internet users.

