Family
Online Safety
Institute

EXECUTIVE SUMMARY

Tools for Today's Digital Parents

The role of parental controls in the digital lives of American parents and children.

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Conducted by:

Magid COURAGEOUS THINKING

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ONLINE SAFETY TOOLS EXIST TO ENSURE CHILDREN HAVE SAFE AND SECURE EXPERIENCES ONLINE.

We live in a time of constant media and technology evolution. Our digital world is continually re-shaped by new devices and platforms – what media industries often dub disruptive technology. This disruption goes well beyond the media industry, impacting our daily lives in personal, professional, and social spheres. This year more than ever, we've seen the effects of technology on our families.

The emergence of COVID-19 brought about the need for many parents to adapt their approach to digital parenting. In many instances, this meant parents allowing more flexibility and the expansion of their kids' engagement with technology, particularly in light of distance learning. While this context played out in real time, the Family Online Safety Institute (FOSI) set out to understand in greater depth the role that parental controls and online safety tools play in ensuring that kids have a safe, positive environment online.

These tools – provided by the media and tech companies and often referred to as parental controls – serve to assist parents, but are they really being used? And if so, are they helpful to parents?

To help FOSI achieve this initiative, media research firm Magid conducted a multi-faceted research project that analyzed online safety tools, what they're designed to do, and consumer attitudes of both parents and children towards these tools. This project was conducted in partnership with Verizon, a FOSI member company.

WE WANTED TO LEARN:
- What online safety tools are available to parents today?
- Are parents using these tools?
- What types of experiences have parents and kids had with online safety tools as they try to encourage safety and responsibility online?
- What do parents like/dislike about current parental control tools?
- What are the drivers that brought parents to use technical tools, or what is stopping them from using them?
- What can companies do individually to better meet the needs of today's parents in providing solutions?
- What can the technology industry as a whole do better to improve best practices and cultivate tools better suited to meet families' needs?
- What can the industry learn from the parent/child digital safety dynamic to help develop offerings that are more likely to be adopted and used?

ON USAGE

79% of parents use controls currently or in the past

2/3 of parents are generally unsatisfied with the tools they have to keep kids safe online
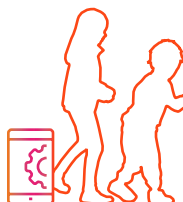
Millennial parents are more likely than Gen X and Boomer parents to use/have used digital safety controls

Parents of ages 7-11 are most likely to use/have used digital safety controls

92% of parents have some form of rules
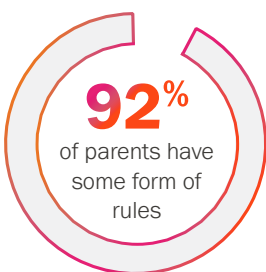
Although house rules are more common, 65% of parents have used a type of digital tool in the form of in-app solutions, parental controls, safety features, privacy settings or digital usage restrictions.

ON CONTENT & CONCERNS

Parents are "concerned" about 20+ digital threats and issues -- and "very concerned" about half of those

*Still, 11% of parents have not covered any of these topics in conversations with their kids*

Parents tend to be most concerned about sexual content — even over social media

63% of parents of kids aged 7-11 think tools to block adult/ mature content from kids is critical

ON RESPONSIBILITY

A pattern in parenting is beginning to emerge with Millennial parents seeing a significant shift in responsibility; they see this as more of a shared responsibility, as opposed to Boomer and Gen X parents, who owned much more of this responsibility themselves

PARENTAL RESPONSIBILITY
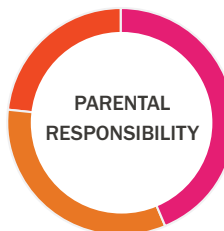
57% of Baby Boomer parents believe that "most responsibility" lies with parents, in contrast with

43% of Generation X parents

30% of Millennial parents

This research yielded insights from parents and kids regarding their experiences with online safety tools.

An insights analysis highlighted these key takeaways to provide guidance for media and tech companies in their efforts to demonstrate product responsibility and meet the needs of today's digital families.

1 *CONSUMER DESIRE FOR A ONE-STOP SHOP & RESOURCE ON PARENTAL CONTROLS IS AN OPPORTUNITY FOR TECH & MEDIA COMPANIES*

- No centralized information source or online safety tool solution currently exists
- Parents want a solution that simplifies digital parenting and guides consumer online safety decision-making

2 *DIGITAL PARENTS FEEL OVERWHELMED*

- Keeping up with the latest tech, apps and online safety options is challenging for parents
- The volume of parental concerns is high, with parents identifying 20+ online safety topics as a concern

3 *MILLENNIAL PARENTS, HAVING GROWN UP WITH TECHNOLOGY, ARE LOOKING FOR MORE DIGITAL PARENTING SUPPORT FROM THE INDUSTRY*

- Millennial parents are more interested in industry initiatives and tools as solutions than previous generations
- This trend will likely grow in the near future

4 SIMILARITY ACROSS DIGITAL PARENTING TOOLS & FEATURES LEAVES ROOM FOR INNOVATION AND DIFFERENTIATION

- Parents' willingness to pay for quality solutions demonstrates the high level of consumer importance to media companies
- Parents' lack of satisfaction with current tools also indicates that improved digital parenting tool offerings have marketplace potential

5 IT IS CRITICAL FOR MEDIA COMPANIES TO REACH PARENTS BEFORE OR WHEN KIDS IN THE HOUSEHOLD REACH THE 7-11 AGE RANGE

- Messaging and information directed at parents of kids aged 7-11 should be strongly considered
- Beyond product messaging and sales, there is a consumer desire for media companies to advise parents as their kids begin leading digital lives
- Post-purchase surveys or key questions at point of sale for smartphones and other devices could trigger outreach efforts aimed at parents

6 ONLINE SAFETY CENTER DESTINATIONS HAVE BECOME AN INDUSTRY BEST PRACTICE FOR MEDIA AND TECH THOUGHT LEADERS.

- Many platforms, including all major social media platforms, provide online destinations that promote, explain and demonstrate safety features
- Safety centers that address multiple services from the safe platform/ company, however, add to parents' self-described "overwhelmed" feeling as the breath of information can become dense