



Family  
Online Safety  
Institute

RESEARCH REPORT

# Tools for Today's Digital Parents

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

November 2020

Conducted by:



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### **Tools for Today's Digital Parents**

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# OVERVIEW





# 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?

# EXECUTIVE SUMMARY



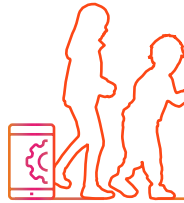
## ON USAGE



**79%** of parents use controls currently or in the past

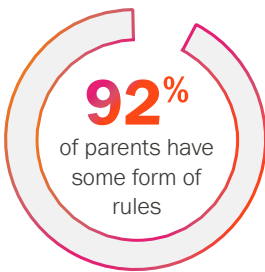


**2/3** of parents are generally unsatisfied with the tools they have to keep kids safe online



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*



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*



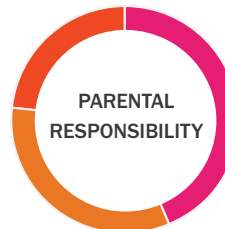
Parents tend to be most concerned about sexual content – even over social media

*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



**57%** of Baby Boomer parents believe that “most responsibility” lies with parents, in contrast with

**43%** of Generation X parents

**30%** of Millennial parents



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*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.*

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## **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

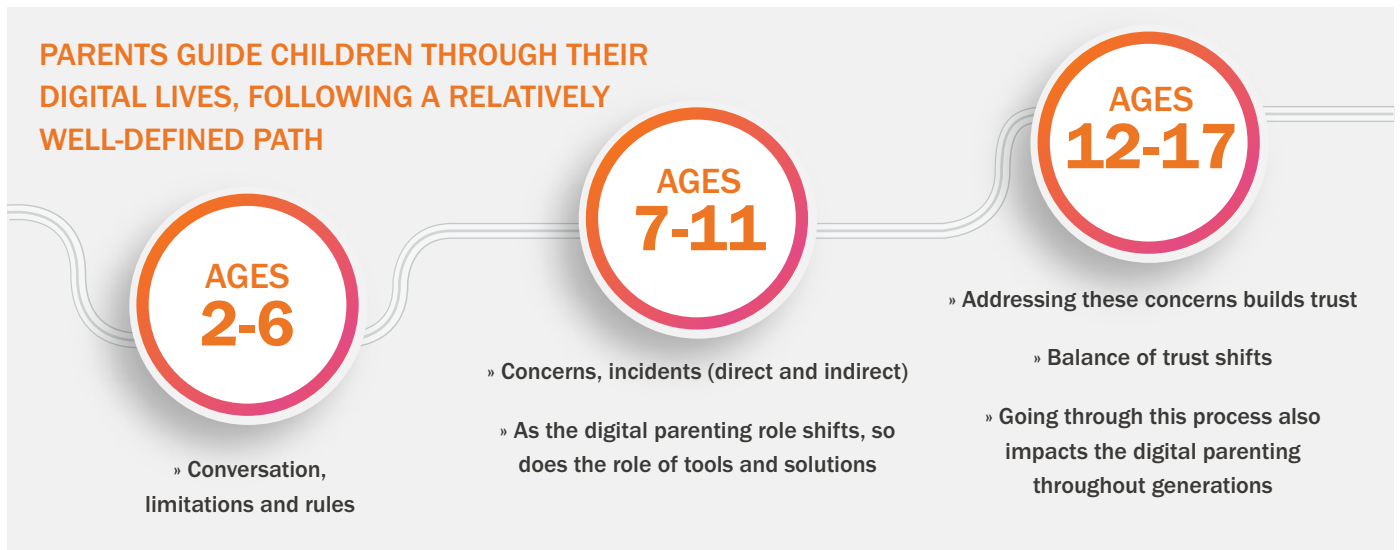
## **6 ONLINE SAFETY CENTER DESTINATIONS HAVE BECOME AN INDUSTRY BEST PRACTICE FOR MEDIA AND TECH THOUGHT LEADERS.**

- 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



# **DIGITAL PARENTING: A JOURNEY TOWARDS TRUST**

Every family has a unique structure, perspective, and value system, and there is no one-size-fits-all solution for the challenges of raising tech-savvy kids. However, this study found that digital parenting today follows a path that is very well-established – a journey towards trust. Parents and caregivers guide children through their initial introductions to technology, first by observation and then in practice. Most parents in these early experiences with a new device or social media account will talk with their kids about safety, potential risks and the issues that are of particular concern to that family. This is also a time when some form of rules are established. Often “house rules” are implemented in place of, or in conjunction with, online safety tools.



As kids’ proficiency and engagement increases, their access to technology broadens. The broader this access, the greater the exposure to concerns and risk. Often, parents and kids experience incidents that increase their sense of urgency about ensuring that proper boundaries and safety practices are in place. These incidents may directly involve the child or family, or be something that occurred within a family’s community or school. It may also be a topic that is gaining steam in the news, such as cyberbullying on social media or the consequences of bad online behavior on people’s employment or academic opportunities. This phase of digital parenting – especially evident for families with kids aged 7-11 – is the most common time for parents to use parental controls and online safety tools.

As time goes on, there is a shift. Typically in the teen years, kids begin to earn parental trust and the balance of responsibility leans more toward the child. Kids begin to have more autonomy in their digital lives. While fatigue or overwhelm may also seem to be at play in some instances, parents are more likely to have increased trust in their child’s ability to make good decisions before relinquishing the ownership of their kids’ digital safety.





# METHODOLOGY



## TO BEST UNDERSTAND THE NEEDS OF TODAY'S PARENTS WE TOOK A MULTI-PHASED APPROACH:

- 1 Digital parenting tools and technology landscape audit
- 2 In-depth conversations with parents and teens regarding online safety approaches and experiences
- 3 Cross-generational national survey of parents validating needs and concerns



*Online safety has a more appealing sound to me. It is plain and simple and gets to the point, being safe online. Knowing what to do and what not to do and being smart about what you do online, it is the perfect term to use... When I think about 'online safety tools,' I think about personal safety and being smart. However, when I think of 'parental controls,' I think of strict, overbearing, and invasive."*

—Brianna C., age 16

### PARENTAL CONTROLS AUDIT

A team of auditors assessed the many parental control and online safety tools currently available to parents to manage digital media experiences for their families. We'll call these "online safety tools" (sometimes they are referred to as "parental controls"). Our landscape review of these tools examined the features and options within a wide range of services and platforms, as well as stand-alone options such as third party monitoring apps.

### ONLINE COMMUNITIES

We conducted qualitative research via online communities with groups of American parents and kids.

- Parenting Community -- 12 parents of kids aged 2-16.
- Children Community -- 9 Teens ranging from 12-16 years of age.

### PARENT SURVEY

We conducted an online national U.S. survey with 1,200 parents of kids 2-17 years of age (in home). Participants ranged from 22-64 years of age, which allowed us to gain perspective across generations of parents.

Census representative sampling in each state based on gender, age and ethnicity.

### NOMENCLATURE

Many terms have been used to describe the tools available to today's digital parents. This is in part because parents and kids themselves use a variety of terms. We explored this with parents and determined that while "online safety tools" and "parental controls" are the most popular terminology to apply to these tools, there is no clear consensus on what these tools and resources should be named. Nearly all the teens who participated in this study prefer "online safety tools" or "digital safety tools." The term "parental controls" felt overbearing to teens.



# THE TOOLS AVAILABLE TO PARENTS TODAY

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*“It’s somewhat daunting to have so many options for how to control access. It would be great to have it all in one place.”*

*– Dad of tween 7-11*

## WHAT TOOLS ARE AVAILABLE TO PARENTS TODAY?

Before hearing from parents, it was important to understand to understand the options available to families today. To gain this understanding of online safety and digital parenting tools, Magid's team of experienced content auditors took an in-depth look across key content platforms and stand-alone solutions. A combination of factors was used to determine the primary platforms to evaluate, including total subscribers, downloads, daily users and services that are the most ubiquitous in the marketplace today:

- Mobile devices
- Games and gaming platforms
- Third party parental control apps
- Router based parental controls
- Video services [ad-supported and subscription-based video on demand platforms (AVOD and SVOD)]
- Audio services
- Video conferencing platforms
- Search browsers
- Social media



*“I want the ability to control and see what my child is doing on any device where I can block or limit use.”*

*– Mom of teen 12-16*

## PLATFORM BREAKOUT FINDINGS: TOOLS FOR PARENTS ACROSS VARIOUS DIGITAL MEDIA DEVICES & PLATFORMS

### THIRD PARTY PARENTAL CONTROL APPS

- Nearly all services offer location tracking, restrict downloads, and real-time content filtering
- Many third-party apps offer multi-tiered options. Tiers vary by additional features such as emailed status reports, dashboards, and SMS monitoring for a monthly fee

### MOBILE DEVICES

- Nearly all devices offer built-in parental controls, though some recommend tools through links
- Account registration is required in order to fully access parental control features
- Digital parenting tools on devices include purchase blockers and content filtering. Parental controls are set on devices themselves

### ROUTER-BASED PARENTAL CONTROLS

- Routers offering parental controls all generally offer the ability to block specific sites and categories, and to set time restrictions
- Some router devices offer more features through a cloud-based service for a monthly fee. Monthly subscriptions provide features like usage reports, profile creation, and a feature that 'rewards' users with additional time beyond current user-initiated time restrictions

### SOCIAL MEDIA

- Nearly all social media platforms require registration offering only a limited amount of content for those not logged in. Registration is required to access all content on some platforms. Conversely, some platforms offer limited functions for non-registered users
- All platforms offer privacy settings where users can block users, or limit their profile visibility. Some also provide time limits and restrictions

### GAMES AND GAMING PLATFORMS

- Nearly all gaming platforms offer parental controls that leverage ESRB content ratings. Gaming platforms offer family accounts where profiles can be created
- Gaming platforms offer content restrictions, though each platform uses different ratings (restrictions based on age vs. ESRB rating). All gaming platforms offer options to block purchases
- Games with social elements will generally offer privacy settings



*“It’s nice to have all the information in one place. It would save some time. Even so, I would still research beyond just one place to find if anything was missed and to be sure there wasn’t any bias in the one resource.”*

*– Dad of tween 7-11*



### APP STORES

- Major app storefronts offer filters, but in different ways and with their own rating systems

### VIDEO CONFERENCING

- Video conference platforms generally require an account to host a meeting and adjust preferences
- All services we reviewed have privacy settings with features to turn the microphone and camera on/off. They all have a waiting room/area for participants prior to entering meeting (participants must then click to enter meeting). Some services keep participants in waiting area until the host arrives

### AUDIO

- Nearly all music, podcast and audio platforms offer parental controls that include features to block explicit content and display explicit content label
- Most services have the ability to share songs and playlists
- Some social platforms offer privacy settings to block users

### STREAMING SERVICES (SVOD)

- Nearly all the subscription streaming services have parental controls that offer content filtering and display content ratings
- Most services offer controls to block graphic/sensitive content and, where relevant, controls to block purchases
- Social sharing (user comments) is rare, with the ability to block comments and users even more rare
- Some services offer mature content notification screens. Few notify viewers that content may contain outdated cultural descriptions

### STREAMING SERVICES (AVOD)

- Most of the ad supported video streaming services do not require registration to access video content, but need an account in order to adjust preferences
- Most services offer some level of parental controls or privacy settings, and include content ratings
- Platforms with user generated content offer privacy settings and tools, including the ability to block users from viewing their channels or communicating with them

### SEARCH BROWSERS

- Browsers do not require registration, but account and sign-in is needed to set user-initiated safe search preferences
- Nearly all browsers offer privacy settings and a safety search mode that hide mature/adult titles and block graphic/sensitive content



*“I haven't put on time restrictions and different usage restrictions because I don't know how and haven't taken the time to look into it. I need to find out if there are any apps that can help with doing it all in one.”*

*– Mom of teen 12-16*

## CONSUMER RESEARCH PHASES

The vast landscape of digital tools available provides a lot of options for parents to keep their kids safe online. However, are these tools being used and are they helping? Through our conversations with parents and kids as well as an online survey with parents to quantify what we heard, we learned from parents what shapes their journey towards trusting their children to use technology responsibly. Gaining a broader understanding of parental concerns and their experiences helped contextualize the role that the industry's tools and solutions play in assisting today's digital parents. Findings also provided perspective from kids about their own concerns and, what they do to keep themselves safe. We explored their perceptions on the impacts that digital parenting – including the implementation of tools that may have restricted or limited their own access and usage – has had on their lives.

In conducting and analyzing the research, it was noted that digital parenting styles vary, heavily influenced by two key factors: the age of the child and the generational identity of the parent.

### CHILDREN ACROSS THREE AGE RANGES GENERALLY HAVE SIMILAR USAGE NEEDS AND PARENTAL INVOLVEMENT

- **2-6 – Young children.** A child's introduction to technology, generally resulting in limited engagement and complexity in the type of content and services kids are using
- **7-11 – Tweens.** An exploratory period of increased usage that includes specific types of content, apps and platforms. This is a common time for parents to use parental control tools
- **12-17 – Teens.** A time of developing independence, with more social influences, more complex online needs and, ultimately, more responsibility

## THE GENERATION OF THE PARENT TENDS TO IMPACT THE APPROACH TO RESPONSIBLE DIGITAL PARENTING



### BOOMERS

External and existential threats are of greater concern such as concerns over predators

**57%**

believe responsibility lies foremost with parents



### GEN X

Bridging a digital parenting gap between Boomers and Millennials, Gen X tends to have greater generational concern over what kids are watching

**24%**

are less likely to use Internet or pay TV provider tools than other generations



### MILLENNIALS

Having grown up with technology, Millennial parents tend to be more generally concerned about social media, with notably more concern about social interaction with those known to the family. They also tend to be more concerned about their own kids as potential perpetrators of social media misbehavior

**33%**

explore platform-level social media and streaming service safety tools - more than either Gen X or Boomers



### KEY FINDINGS:

- Millennial parents are more likely to be very concerned about kid-driven and kid-focused behaviors. This refers to kids engaging in "under the radar" activities they know they shouldn't be doing, such as making purchases without permission or accessing content parents have restricted.
- Millennial parents are more concerned about the consequences of their own children's behavior as a potential perpetrator of negative interactions. Boomers and Xers tend to be more concerned about outside forces.

As Baby Boomers "age out" of being the predominant parenting age group, we see the vastly different attitudes and outlooks of new parental generations. The difference between the more closely related Gen X and Millennial parents still seems to hinge on how much technology parents grew up with themselves. This impacts both their views and values on who is most responsible for kids learning about online safety. This also has the potential to impact a wider array of parental values, such as their children's autonomy and levels of independence.



# PARENTAL INVOLVEMENT, CONVERSATIONS AND RULES





## PARENTS MAKE IT CLEAR THAT THEY ARE INVOLVED IN THEIR CHILDREN'S DIGITAL LIVES

Parents are concerned, proactive and engaged in helping their kids use technology responsibly. There is a range in the level of involvement, generally determined by what, when and how their kids use different digital devices, platforms and services.

*"I'm usually involved all the way across the board when it comes to my child getting on social media, watching movies, and playing games. I like to know what's going on."*

*- Dad of tween 7-11*

### PARENT/CHILD DIGITAL LIFE CONVERSATIONS

One of the most encouraging insights about today's digital parents is that nearly all report having conversations about kids' digital lives. Kids' ages and the type of digital engagement

in question greatly impact these conversations as parents are likely to address concerns that are most pertinent to their own situation.

- The most common conversations are around what kids are watching, online interactions with people unknown and known, and general use of the Internet
- Some parents of teens report being more involved on specific subjects, such as texting inappropriate pictures and accessing adult content online – in these cases parents tend to monitor their child's activity more closely, set more rules, and have more conversations
- Parents who report being somewhat less involved say they trust their kids to make good decisions and to alert them if something goes wrong
- Conversations with kids are often triggered by discussions parents are having with family and friends about online safety topics
- Parents who say they are "very involved" are intent on helping kids learn to make good decisions, and understand the consequences of bad behavior online

# 76%

**of parents give their conversations high marks, feeling these interactions are successful** (this confidence is less true – but only slightly – for parents of teens, whose kids have a higher aptitude for technology use and are more likely to be involved in social media and its more complicated issues)

### Teens support this notion of parental conversation effectiveness

Teens in our online community report that they feel safe with what they've been taught and with the rules parents have put in place for them.

### WHAT ARE PARENTS TALKING TO THEIR KIDS ABOUT?

We heard from parents about ten common topics of online safety concerns that have initiated conversations:

- What kids are watching
- Online interactions with people known
- Online interactions with people unknown
- General Internet usage (and what sites kids are allowed to visit)
- Social media
- Screen time
- Gaming (what kids are playing including mobile, console or computer games)
- What times of day kids can use devices
- What they are seeing/reading for digital entertainment
- What they are listening to (music, podcast, streaming services, etc)



### KEY FINDINGS:

- While parents initiated conversations with their kids around a number of these topics, there is no single topic that begins the online safety conversation
  - » The most common conversation is about what kids are watching (52% of parents have discussed)
  - » By the time kids are teenagers, issues tend to get more complex. (58% of parents of teens have at some point had a conversation about both general Internet usage and social media – the most of any parenting group when broken out by child’s age)
- 11% of parents have never discussed any of the key topics (see "Concern for Digital/Online Safety Topics" chart on page 25)
- Parental engagement, regardless of platform, is most commonly instigated by family/friend conversation (other factors include direct personal incidents, news stories and school/community incidents)

### GENERATIONAL SHIFT:

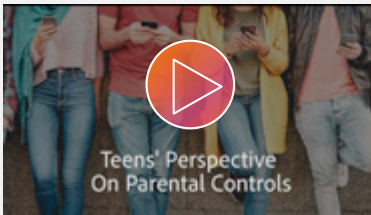
- Among parents with kids aged 7-17 Boomer parents are more likely to have had conversations with their child about online interactions with people they don’t know, general use of the Internet and what their kids are seeing in news and entertainment.
- Millennial parents are more likely to discuss online interactions with known people (friends, relatives, local community acquaintances) than Gen X or Boomer parents.

## YOU CAN'T BEAT THE HOUSE – PARENTS LEAN MORE HEAVILY ON INFORMAL RULES THAN DIGITAL SOLUTIONS

- 92% of parents have either formal or informal rules established with their child (led by parents of children aged 7-11)
- Informal “house rules” are more common than formal rules, but two-thirds of parents use formal rules for at least one topic
- 65% of parents with rules in place are currently using digital online safety tools to enforce the rules
- Use of formal rules drops off for parents aged 12-17 to where only half use formal rules
- Rules are least likely to be in place for what kids are listening to and what kids are seeing/reading for news and entertainment

### WATCH:

***Teens speak for themselves  
on the role that parental controls  
plays in their lives***



### TEEN PERSPECTIVE

In our discussions with teens, some say they have at least occasionally tried to circumvent the rules, but the majority say they stick to the rules. Those who try to get around the rules take the following steps:

- Delete parental control apps
- Factory reset device to sign out of an account and unlock parental controls
- Play games that are not approved by parents

Less frequently, teens reported trying to negotiate the rules by, for example, trying to increase time allowed for gaming or gaining permission to have phone discussions with the opposite sex.

Many teens commented that schools have made efforts to address digital safety. However, these were described as “cookie cutter” and “outdated” and considered by our teen focus group to be less effective than parental conversations.



# CONCERNS AND ONLINE RISKS

“

*“I am concerned that she’ll watch something or listen to something that could shift the way she thinks in a negative way. I don’t want her to form an opinion based on an ignorant view of what she may think the world thinks and acts like.”*

*– Dad of kid 2-6*

## CONCERNS AND ONLINE RISKS

Most parents are concerned about their child's digital safety. The peak of concern is with parents of children aged 7-11, who consistently show more concern about online safety and interest in tools and features to address these concerns.



*“Cyberbullying is always a threat, to anyone. One wrong step in the wrong community, and everyone you call a friend could easily become an enemy. I avoid it by keeping more to myself online. I don’t get involved in toxic communities or allow myself to engage with dangerous people. I wouldn’t have learned to do this if I hadn’t experienced it.”*

- Alex B., age 15

As we get deeper into what parents have to say about online safety in general, one term comes up quite frequently – the feeling of being “overwhelmed.” This begins with the sheer volume of concerns parents have regarding kids online engagement and device usage.

Parents' top concerns tend to be focused on sexually suggestive content and bullying/abusive behavior. 40% of parents with kids aged 2-11 have experienced a specific online safety issue that sparked certain concerns.

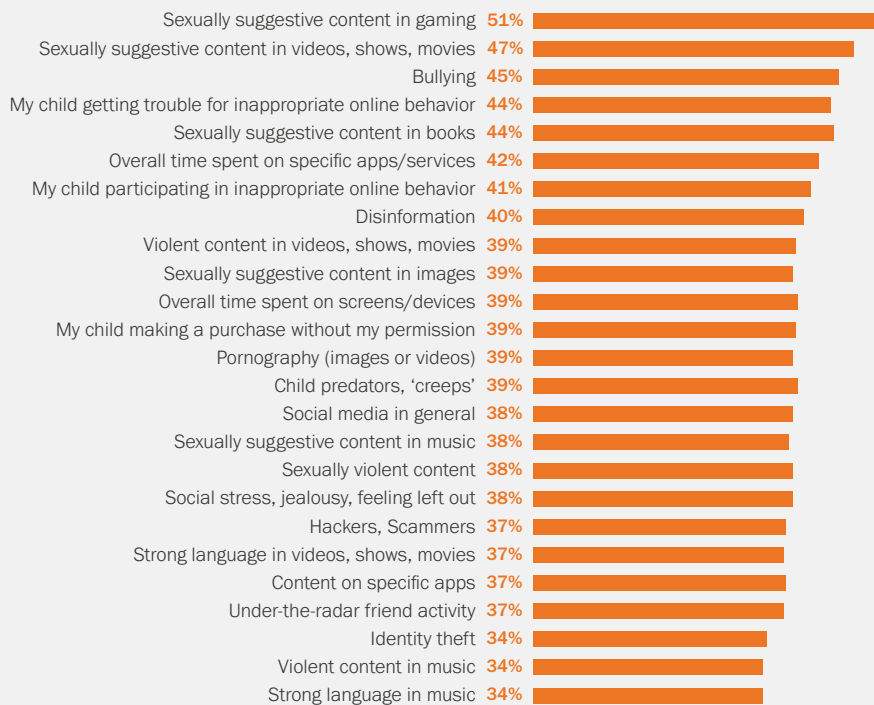
## DEGREES OF CONCERN

External threats such as predators, hackers, or bullies, as well as sexual content are top concerns, but it is important to note the majority of parents report over 20 topics as a “top” concern. The opportunity to provide solutions and information is significant. Nearly half of parents report being “very concerned” about 11 or more of these topics.

### CONCERN FOR DIGITAL/ ONLINE SAFETY TOPICS

(based on total)

■ - Very concerned





## EVOLVING CONCERNS

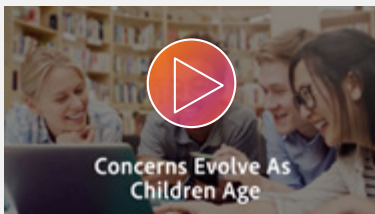
The way parents experience their concern for their children's online safety tends to evolve rather than fade away. Most parents say they are more concerned (or equally concerned) as their child gets older with a sharp increase among parents of kids aged 7-11. For those with two or more children, the second/younger children tend to have more rules, stricter rules and more oversight.



*“My concerns regarding online safety have changed tremendously as I've gotten older. I have more freedom now, but that also means people with negative intentions have more opportunity. So while I'm able to do essentially anything I want to, I also cannot turn a blind eye to protecting myself and being weary of who I interact with and my online environment. As I get older, I'm going to have to anticipate even more freedom, and unfortunately, more opportunities for people to influence me and my behavior in negative or positive ways. I need to be careful, and that's most important.”*

– Male teen, age 15

**WATCH:**  
**Parents discuss concerns  
and teachable moments**





# RESPONSIBILITY

“

*“Parents are the most responsible because it is up to them to put controls on their kids' content viewing and decide what is appropriate and what is not. Children have responsibility, once taught by parents, to self-monitor. Device manufacturers also have responsibility to put in place parental control settings.”*

*– Dad of tween 7-11*

*“I feel like she is starting to trust me more now that I am older and more mature.”*

*– Donnevia N., age 14*

## RESPONSIBILITY

To take on the challenges of protecting children online, there must be responsibility and accountability. The question is, with so many platforms and a varied landscape of digital concerns, who owns this responsibility? The conversations that parents reported having with their kids hints at this.

Parents recognize that as the central figure and role model in their children's lives, they have a responsibility to teach and provide safety. However, most parents view this as a shared responsibility, not just within families. They also see a duty for the tech and media industries, regulatory bodies, and broader society to play a role in supporting online safety. This belief in a shared responsibility is gaining traction with younger parents in one of the most notable generational shifts we see currently trending today.



### KEY FINDINGS:

- 95% of parents say they own at least some of the responsibility of keeping their kids digital lives safe
- Parents by far consider themselves to own the “most” of this responsibility – however this is shifting significantly as younger generations of parents believe more strongly in a shared responsibility
- This generational difference is far greater than difference based on the age of the child – overall, parents with children of all ages largely agree on where responsibility lies

### GENERATIONAL IMPACT:

“MOST RESPONSIBILITY” LIES WITH PARENTS

<b>30%</b>	<b>43%</b>	<b>57%</b>
for Millennial parents A22-39	for Gen X parents A40-55	for Boomer parents A56-64

## IS THE INDUSTRY HOLDING UP ITS SHARE OF THE RESPONSIBILITY?

Parents' ownership of the responsibility of keeping kids safe online doesn't absolve media companies. Industry constituents across Internet service providers, device manufacturers, app/service creators and content creators all have a role, according to parents. Unlike parents' high opinion of their own performance, about one quarter of parents give the industry low marks in their efforts to keep kids safe.



### KEY FINDINGS:

- No media industry constituent stands out as having done an especially better job of protecting kids or providing digital safety options
- About 4 in 10 parents think that all constituents – Internet service providers, device manufacturers, app service creators and content creators – are doing a good-to-excellent job
- About 25% of parents think that these constituents are doing a fair-to-poor job





# **WHAT IS WORKING (AND NOT) FOR PARENTS**



*“Limiting content is most important to me, so switching to a kid friendly mode is important because it allows me to not have to think about what she’s watching. Also, I currently use settings that limit her time on the device and when she can watch them throughout the day so those are also important.”*

*– Dad of kid 2-6*

## WHAT IS WORKING (AND NOT) FOR PARENTS?

Parents demonstrate a certain amount of self-sufficiency in their conversations with their children and their perceptions of ownership when it comes to online safety responsibility. Still, they continue to express a need for further support. The tech industry has developed various types of parental controls and online safety tools and resources to assist, but it seems that uptake still remains low.

How do parents really feel about these tools? Based on our exploration, parents gave clear indication that these tools can be helpful, but also create overwhelm. That the number of tools, features and options – similar to online safety issues and concerns themselves – are vast, which leaves many parents feeling unsupported by the industry, and with certain needs going unmet.

## FEATURES AND TOOLS PARENTS ARE USING

Despite concerns over external threats and social media interaction, parents’ use of safety tools tend to focus on simple solutions that serve to block a particular type of content. This is likely also impacted by the fact that parents are most likely to use digital tools during the 7-11 year-old age range of their kids, generally prior to kids’ deeper engagement with social media platforms.

### VIDEO

- Parents are most interested in filtering abilities to encourage age-appropriate content and the blocking of mature material, especially for video content; this is most common in parents of 7-11 year olds
- 32% of parents of teens are not likely to be using content filtering or any type of content controls on SVOD

### SOCIAL MEDIA SAFETY FEATURES ARE IMPORTANT TO PARENTS

- There is generally similar interest in many of the social media safety features with direct messaging controls and ability to block users edging out other safety features

# 71%

of parents are **not satisfied** with the tools they have used to keep kids safe online.



### GAMING

- Half of parents of kids aged 7-11 are interested in controls for mature language and social components within gaming, especially if a weekly usage report is part of the solution
- There is consistently more interest from parents in solutions and controls for gaming than there are in social media
- Parents are most interested in a full suite of device tools that offers contact management, time restrictions and usage limits
- Blocking in-app purchases is the single most interesting device safety feature to parents

### THIRD-PARTY STAND-ALONE DIGITAL PARENTING TOOLS

- A dashboard that reports and tracks children's activity is of most interest to parents as a feature in stand-alone tools
- Needs for parents in stand-alone solutions cover a wide breadth of standard features, all of which are individually of interest to at least one-third of parents



*“Blocking mature content is major to me because I don’t want anything inappropriate piquing my son’s interest. Being able to have a site that I can log on to see his activity and content of what he is doing is good because children tend to try to get over because you do not constantly watch them. I am a fan of passwords and PINs because it makes life simpler for me, but at the same time children are so savvy with technology these days they may figure it out.”*

*– Mom of teen 12-16*

### ROUTER-BASED PARENTAL CONTROL SOLUTIONS

- Most provide the ability to block specific sites and categories, time restrictions and access filters
  - Some router devices offer more features through a cloud-based service for a monthly fee. Some monthly subscriptions provide features like usage reports, profile creation, and a feature that ‘rewards’ users with extra time than the time restriction allows

### THE FEATURES IMPORTANT TO PARENTS

Parents recognize the importance of nearly all the standard digital parenting tools provided by media companies.

#### MATURE CONTENT BLOCKERS ARE THE MOST IMPORTANT FEATURE FOR PARENTS

- Over half of parents consider this to be an essential parental control tool
- Especially critical for parents with kids aged 7-11 – 63% of those parents consider adult/mature content blockers to be essential
- Mature content could include R-rated movies, TV-MA-rated television, adult/X-rated movies and adult websites with sexual content

**PRIVACY SETTINGS ARE THE MOST ESSENTIAL TOOL FOR PARENTS OF TEENS (#2 OVERALL)**

**IN ADDITION TO ADULT CONTENT BLOCKERS AND PRIVACY SETTINGS, OVER 80% OF PARENTS CONSIDERED ALL OF THESE FEATURES TO BE IMPORTANT IN A DIGITAL PARENTING TOOLKIT OFFERING**

- Content ratings
- Content filters that allow filtering/blocking content by rating
- Mature content notifications (e.g., parental discretion advised messages, explicit music labels)
- Age requirements to create an account (e.g., must be 13+ or 18+ to create account)
- Time/day restrictions (e.g., ability to set screen time limits, etc.)
- Contact monitoring
- Purchase blockers
- Usage reporting & management via web dashboard or email (dashboard preferred)
- Location tracking
- Restrict download/use of apps
- Password or PIN required to make changes to parental controls
- Ability to link parental account with child's account to control and view activity

## 4 of 5

parents are open to or are already paying for controls in a router-based solution

### THE VALUE PARENTS PLACE ON DIGITAL PARENTING SOLUTIONS

With many free tools available on the market, over a quarter of parents are currently paying for a service that includes some form of parental control functionality. Over half of parents are either currently paying for or would pay for a service that included at least one of these safety and security features:

- Content filtering
- Child's activity and usage monitoring/reporting
- Remotely lock child's device
- Approve all apps child attempts to download
- Contact management



*“They get an email of my usage and search history at the end of every week. They can block certain apps and limit my hours on the PC. I don't like that they can limit my time; there's some things that take longer than others, and sometimes I leave apps like Chrome open in the background while I'm doing something else, and then that times out when I need it. They do their job, but I'm not the biggest fan. I don't mind my search history showing up though.”*

*– Alex B., age 15*

There is a strong desire for the media industry to simplify their options and make an effort to collate information and tools into one repository or hub. Ideally, **parents want a one-stop shop** that will provide them information on and access to key online safety tools.

**WATCH:**

**Parents discuss the need for a simple, unified source of safety tools and guidance**



Third party tools, stand-alone parental controls and router-based solutions tend to offer a lot of the same functionality. However, one area of differentiation is the inclusion of activity and usage reporting as part of these services. Activity reports allow parents to be aware of what kids are doing online via email or an online dashboard view.

- 86% of parents confirmed a willingness to pay for usage reporting
- 28% of parents interested in a premium service that provides usage reporting are already paying for this
- There is slightly more interest from parents in usage reporting from an online dashboard rather than a schedule of reports delivered via email

### MEETING PARENTS' NEED FOR SIMPLIFICATION – THE IDEA OF A ONE-STOP SHOP

Parents are "overwhelmed" by today's digital parenting landscape. They consider many safety features critical and they're willing to pay for quality digital solutions. All of these factors should send a strong message to the media and tech industries that consumers need and value a solution to simplify digital parenting.



**KEY FINDINGS:**

- The idea of a "one-stop shop" for learning about and/or researching parental control tools has universal appeal with parents
- 2/3 of parents with kids aged 7-11 are very interested in the one-stop shop concept
- Online search results are by far the most popular method parents use to discover digital safety tool options
  - » Especially driven by Boomers, who rely on online searches more than half of the time when in need of information about digital parenting tools
- Parents only go directly to media brands and platform sources about 1/3 of the time

# THE WAY FORWARD



Armed with these insights, what should media and tech companies do to better meet the needs of today's digital parents? Beyond the individual companies, what can the industry at large do to create an atmosphere that better supports parents with accessible, effective digital parenting tools and information?

**1**

*Consumer desire for a one-stop shop & resource on parental controls is an opportunity for tech & media companies*

**2**

*Millennial parents, having grown up with technology, are looking for more digital parenting support from the industry*

**3**

*Similarity across digital parenting tools and features leaves room for innovation and differentiation*

**4**

*It is critical for media companies to reach parents before or when kids in the household reach the 7-11 age range*

**5**

*Online safety center destinations have become an industry best practice for media and tech thought leaders.*