



Promoting Wellbeing in a Digital World

2024 RESEARCH
REPORT

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Our children's wellbeing is of everyone's interest and concern.

News of a teen mental health crisis has been reported for a number of years. Researchers, educators, counselors, and parents have all tried in various ways to both measure and address it. Social media and ubiquitous cellphone use have been blamed as a major culprit. Now, politicians on both sides of the aisle have drafted laws to limit or outright ban younger teens from accessing certain sites, platforms, or apps.

We decided it was time to take a multi-country look at how parents and teens themselves view their overall wellbeing and what role – both positive and negative – that digital technology plays in how they feel physically, mentally, and emotionally. The findings from the U.S., Germany, and Brazil surprised us, mostly because what young people and their caregivers were telling us differed from the prevailing narrative that has come to influence much of the reasoning behind state and federal laws.

Some have argued that Big Tech is just like Big Tobacco. But spending time on social media is not the same as smoking. While online life carries risks and, indeed harms, there are real benefits and rewards as well. Children and young people have certain rights to access content, to connect with others, and to express themselves online. We need to understand more about their mental and emotional states and how these can be enhanced (or diminished) by screen time.

I encourage you to dive deeply into this report with an open mind and a sense of curiosity. It is vital that whatever we do to address young people's mental health issues, we involve our teens in finding workable solutions. It is incumbent upon us adults to take a step back and really listen to what our young people are telling us. Then we can consider what measures we need to create with thoughtful restrictions rather than blanket bans.

Stephen Balkam

CEO, Family Online Safety Institute

December 2024



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About this study

Introduction

Today's teens have come of age in a world defined by two dominant trends:

1. The constant connectivity enabled by smart devices and social media
2. The rise of a more expansive view of wellbeing and its importance in everyday life

How do these two dominant forces – digital life and wellbeing – intersect for teenagers today?

Background

This study was conducted by Kantar on behalf of the Family Online Safety Institute. This research explores how parents and teens navigate the opportunities and challenges at the intersection of digital life and wellbeing.

Research was conducted in the United States, Brazil, and Germany. This multi-country approach points to similarities and differences on perceptions of wellbeing in the digital age and attitudes toward digital wellbeing between parents and teens within and across countries.

Methodological Overview

This study was conducted in a two-phase approach, leveraging both qualitative and quantitative methodologies:

Phase I: Qualitative Focus Groups

24 parents and 24 teens participated in qualitative focus groups across the U.S., Brazil (BR), and Germany (DE). Four focus groups were conducted in each country (two groups with four parents each and two groups with four teens each).

 U.S.

Eight parents and eight teens in the U.S.

 Brazil

Eight parents and eight teens in Brazil

 Germany

Eight parents and eight teens in Germany

Qualitative focus groups with parents and teens aged 13-17 were conducted in all three countries, and parents and teens were interviewed separately.

The focus groups were conducted from July 17 – July 25, 2024.

The qualitative work informed the design of the online survey for Phase II.

Phase II: Quantitative Survey

An online quantitative study was conducted across the U.S., Brazil, and Germany. The quantitative survey was fielded among parents and their teens aged 13-17 years old.

Both parents and their teens participated in the same survey. The parent completed the first half and their teen completed the second half.

1,000 surveys (combined parent and teen responses) were completed in each of the three countries, for a total sample of 3,000 parents and 3,000 teens.

Key Learnings



1 Parents and teens agree that wellbeing is shaped by a constellation of health and wellness factors, but they prioritize these factors differently.

Physical and mental health are seen as top components of overall wellbeing for both parents and teens. However, teens place more emphasis on social health than parents, who instead prioritize financial health. Teens also prioritize digital wellbeing more than parents, who view it as the least influential factor.

Facets of Health or Wellness Considered a Primary Factor of Overall Wellbeing (Ranked by Percentage)

Total Parents



Total Teens



2 While online safety remains a concern, the perceived positive impact of digital life on teens' social wellbeing is undeniable.

Parents' and teens' safety concerns center on the threat of scams and fraud. At the same time, the benefits of digital life to teen wellbeing are also recognized, particularly the positive impact to their social wellbeing, namely, connecting with peers.

Total Parents Total Teens

Top Concern from Being Online to Teens' Wellbeing (#1 Concern, Ranked by Percentage Across the U.S., Brazil, and Germany)



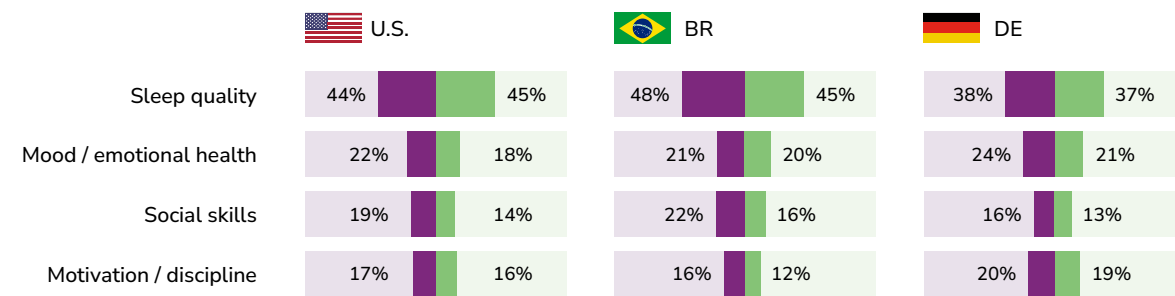
Top Benefit from Being Online to Teens' Wellbeing (#1 Benefit, Ranked by Percentage Across the U.S., Brazil, and Germany)



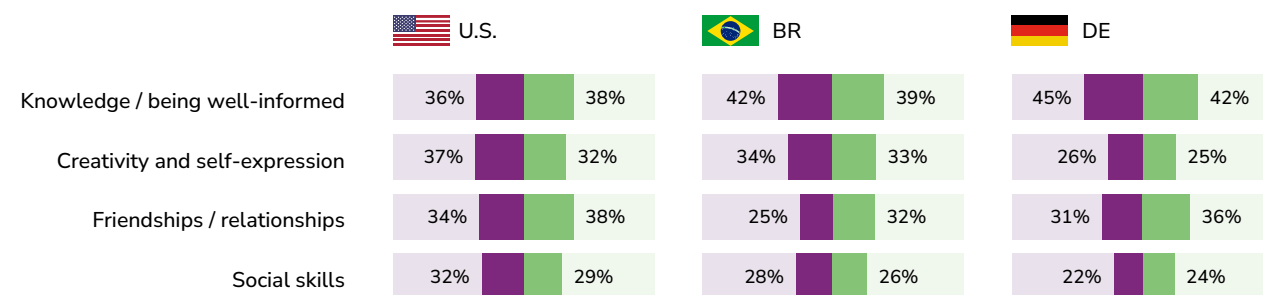
Parents and teens also worry about the wellbeing risks of digital technology, with sleep quality topping their concerns. While acknowledging negative impacts, parents and teens also value the way digital technology and devices support knowledge, creativity, self-expression, and friendships.

Parents Teens

Top Aspects of Teens' Wellbeing Negatively Affected by Digital Technology and Devices (Select Up to Three)



Top Aspects of Teens' Wellbeing Positively Affected by Digital Technology and Devices (Select Up to Three)

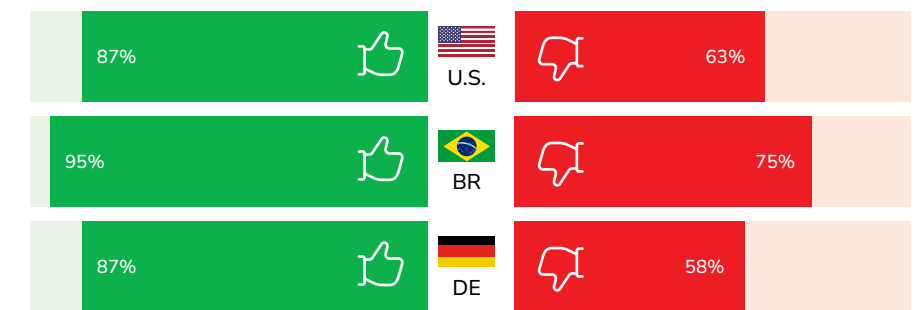


3 Teens self-report more positive than negative experiences when spending time online.

Positive online experiences outweigh negative ones, with nearly all teens (roughly 9 in 10) across the three countries studied indicating that their online activity has "always" or "often" led to a positive effect on aspects of their mental / emotional and social wellbeing. These figures are markedly higher than the negative experiences teens believe happen as often.

Situations Teens Regularly Experience as Direct Result of Spending Time Online (Top-2-Box: Always or Often – Among Teens Only)

Experienced At Least One Positive Situation as a Direct Result of Spending Time Online Experienced At Least One Negative Situation as a Direct Result of Spending Time Online

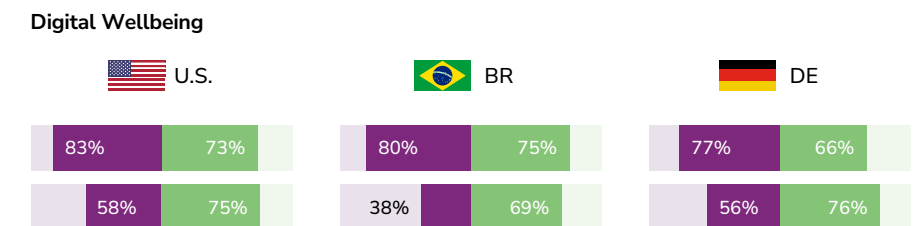


4 Parents and teens agree that families hold primary responsibility for teaching and guiding teens when it comes to their wellbeing.

Both parents and teens believe they are primarily responsible for promoting teen wellbeing, including digital wellbeing. However, teens feel more accountable for managing their own wellbeing than parents admit. In the U.S., 75% of teens believe they are primarily responsible for their digital wellbeing, compared to 58% of parents who share this view. Similar gaps are seen in Brazil and Germany.

Parents Teens

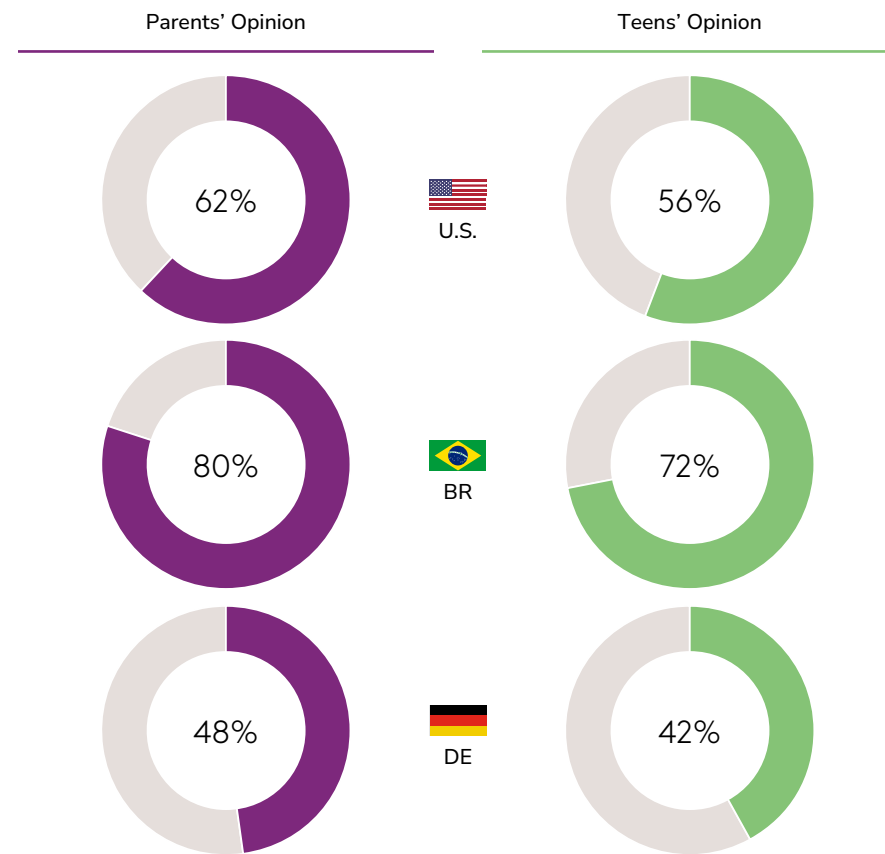
Most Responsible for Teaching or Empowering Teens About Digital Wellbeing (% Ranked in the 1st or 2nd Position)



5 Parents and teens have frequent conversations about the impact of digital life on wellbeing.

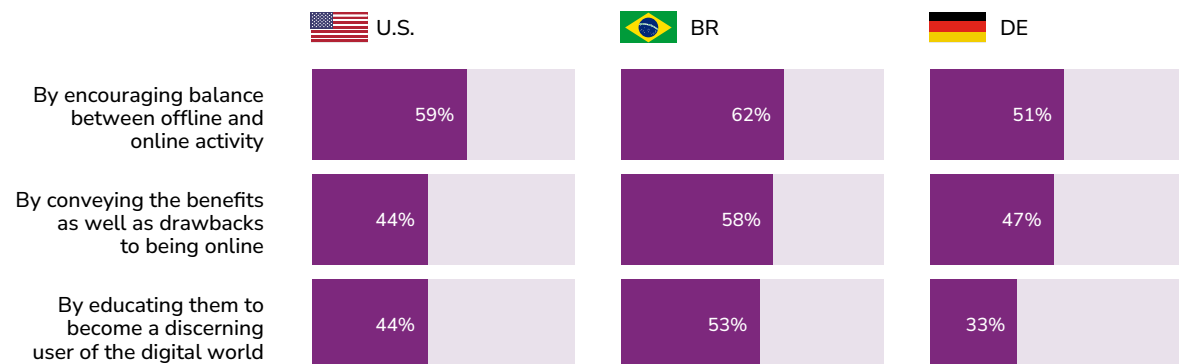
Families routinely discuss digital wellbeing, and in these conversations parents aim to empower rather than control their teens. They encourage balance between online and offline activities, talk about the benefits and drawbacks of being online, and guide them to be discerning and savvy about how they engage in the digital world.

Frequency of Parent-Teen Discussions on How Digital Life Impacts Teens' Wellbeing (Top-2-Box: Daily or Weekly Conversations)



Top Three Ways Parents Aim to Empower Teens to Manage Their Digital Wellbeing (Select All That Apply)

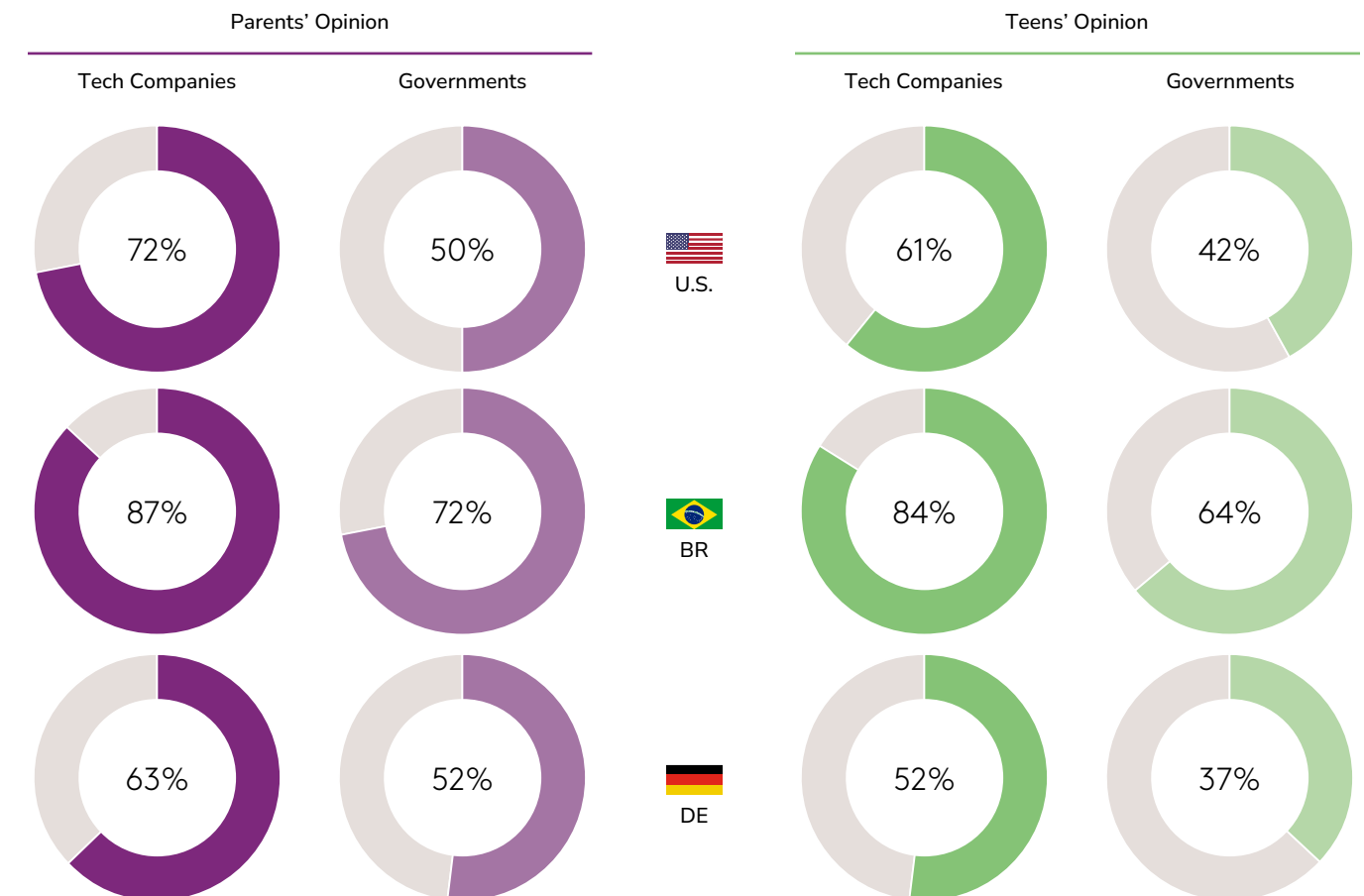
#1
#2
#3



6 Both parents and teens are receptive to additional support for teen digital wellbeing.

While family support is crucial, there is openness to additional help. Across all three countries, parents and teens indicate greater openness to tech companies (vs. governments) playing an even more active role in supporting digital wellbeing.

Sentiment Parents and Teens Express About Tech Companies & Governments Taking a More Active Role in Promoting/Supporting Teens' Digital Wellbeing (Top-2-Box: Very or Somewhat Positive)





7 Parents and teens express interest in trying new tech solutions and features designed to enhance teen digital wellbeing.

Parents are most interested in tools that promote online safety, including default privacy settings, age-gated content, and media literacy programs to help teens identify harmful content. Parents also show strong interest in features that actively support teen digital wellbeing, such as reminders to take breaks and content aimed at improving mood.

Teens share many of their parents' views on tech solutions, but their enthusiasm extends to practical social tools: 62% of U.S. teens, 82% of Brazilian teens, and 54% of German teens are interested in apps that help improve communication skills. Educational resources related to digital wellbeing are also of interest, which aligns with the earlier insight that teens emphasize the importance of both social and digital health in their overall wellbeing.

Parents' Interest in Trying Features or Tools to Support Teens' Digital Wellbeing (Top-2-Box: Extremely or Very Interested) – Top Six Features

U.S.	BR	DE
84% Default privacy settings to protect personal information	93% Default privacy settings to protect personal information	79% Default privacy settings to protect personal information
80% Age limits / filters for content	92% Media literacy education to identify harmful content	77% Media literacy education to identify harmful content
77% Media literacy education to identify harmful content	92% Providing information on mental health resources / support	76% Age limits / filters for content
77% Offering reminders to take a break	91% Age limits / filters for content	73% Offering reminders to take a break
77% Suggesting content that will positively impact mood / behavior	90% Suggesting content that will positively impact mood / behavior	68% Apps limiting notifications at certain times of day
76% Apps limiting notifications at certain times of day	90% Offering reminders to take a break	68% Suggesting content that will positively impact mood / behavior

Teens' Openness to Trying Features or Tools to Support Their Digital Wellbeing (Top-2-Box: Extremely or Very Open) – Top Six Features

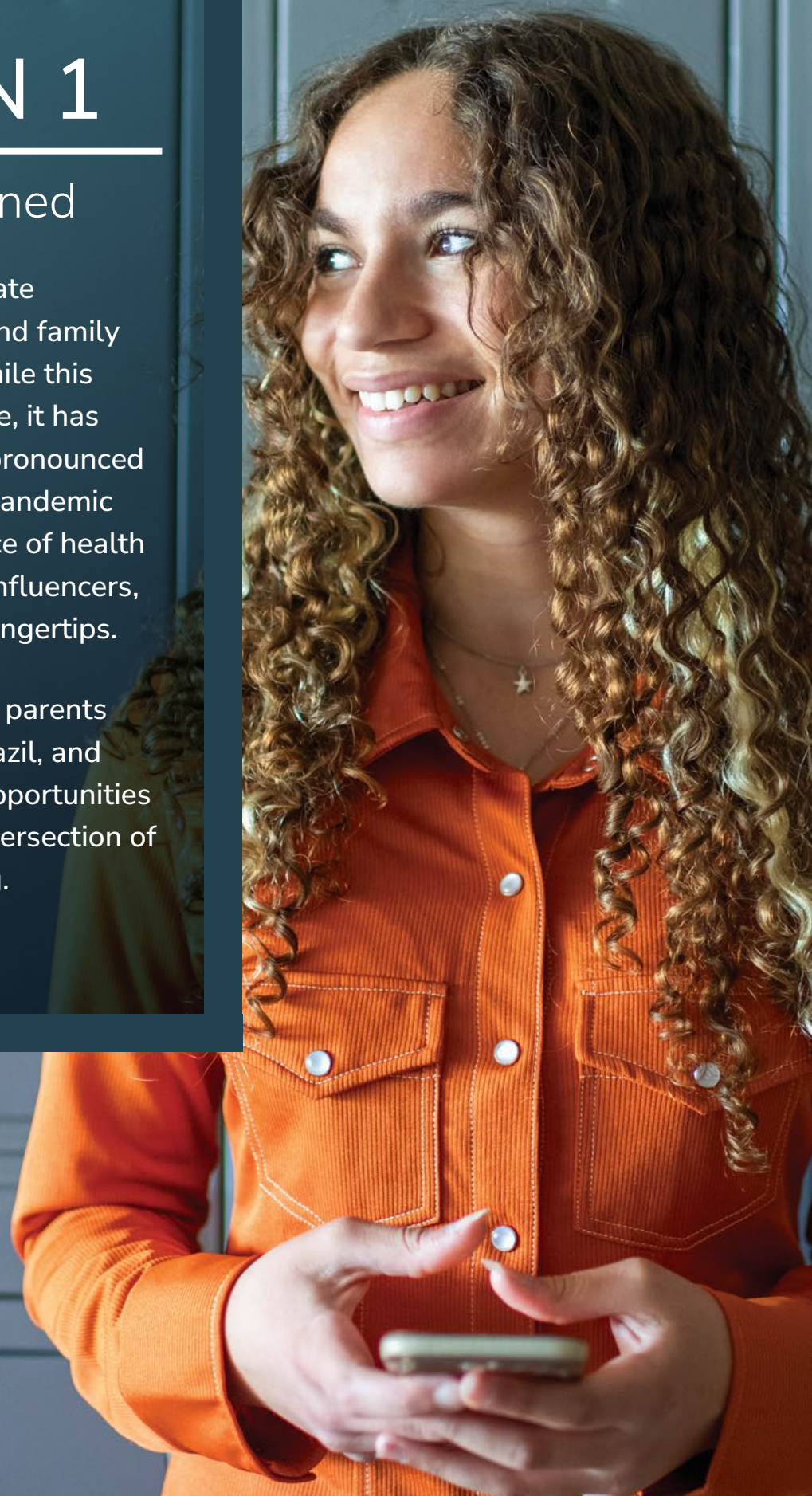
U.S.	BR	DE
73% Default privacy settings to protect personal information	84% Default privacy settings to protect personal information	62% Media literacy education to identify harmful content
65% Suggesting content that will positively impact mood / behavior	83% Suggesting content that will positively impact mood / behavior	62% Default privacy settings to protect personal information
64% Media literacy education to identify harmful content	83% Media literacy education to identify harmful content	55% Suggesting content that will positively impact mood / behavior
62% Offering reminders to take a break	82% Apps or features that allow me to practice communication	55% Offering reminders to take a break
62% Apps or features that allow me to practice communication	82% Suggesting sites / apps where I can learn about digital wellbeing	54% Apps or features that allow me to practice communication
58% Suggesting sites / apps where I can learn about digital wellbeing	81% Providing information on mental health resources / support	52% Suggesting sites / apps where I can learn about digital wellbeing

SECTION 1

Wellbeing Defined

Parents and teens navigate questions of individual and family wellbeing every day. While this has always been the case, it has arguably become more pronounced in the wake of a global pandemic and due to the abundance of health and wellbeing content, influencers, and brands at people's fingertips.

This study explores how parents and teens in the U.S., Brazil, and Germany navigate the opportunities and challenges at the intersection of digital life and wellbeing.



Families view wellbeing as a constellation of factors.

Parents and teens recognize the complex nature of wellbeing. They view wellbeing not as a singular concept, but instead as a constellation of contributing factors – physical, mental and emotional, social, financial, spiritual, and digital. It is the combination and interplay of these factors that constitutes wellbeing in their minds.

In the U.S., Brazil, and Germany, parents and teens overwhelmingly view physical and mental health as the two biggest components of wellbeing. Beyond this, though, parental and teen opinions on the factors influencing wellbeing diverge.

Financial health plays a key role for parents across all three countries and is viewed as the third biggest component of overall wellbeing. This is well ahead of teens, who think of financial health as one of the least influential factors of their wellbeing.

Across these three countries, teens clearly emphasize social health, which they view as the third biggest component of overall wellbeing. This makes sense given the importance of peer relationships for teens as they develop their sense of self and identity. In contrast, social health ranks fourth out of six key components of wellbeing for parents.

//

"I think [wellbeing is] the balance between family and work, mental and physical health, and financial balance. This [last one] gets in the way, as we can't live without money."
Parent, Brazil

//

"I would probably say friends, relationships, and social connections are more important to my teen's wellbeing. For me, it's my family and my mental health and things like that."
Parent, U.S.

Teens recognize the importance of digital wellbeing.

Teens tend to acknowledge the importance of digital wellbeing to their overall health more than parents do. Teens view digital wellbeing as the fourth most influential component of their overall wellbeing, ahead of both spiritual and financial health. In contrast, parents place digital wellbeing last in terms of influence on their own wellbeing, behind all other five components.

Countries prioritize different aspects of wellbeing.

Beyond the global view, there are notable country-specific differences in what families consider key factors of their wellbeing. For instance, parents in the U.S. and Brazil consider spirituality – understood qualitatively as a broader sense of mindfulness rather than strictly religiosity – as a more influential component of their overall wellbeing. In contrast, German parents place greater emphasis on social and digital health than on spirituality. Similarly, teens in Germany prioritize financial and digital health, with less focus on spirituality, reflecting the views of their parents.

Notably, Brazilian teens emphasize the importance of digital wellbeing as a component of their overall wellbeing to a greater degree than U.S. or German teens.



Components of Health or Wellness Considered a Primary Factor of Overall Wellbeing (Ranked by Percentage)

Factors of Consideration	Total Parents	U.S.	BR	DE
Physical wellbeing	1	2	2	1
Mental wellbeing	2	1	1	2
Financial wellbeing	3	3	3	3
Social wellbeing	4	5	5	4
Spiritual wellbeing	5	4	4	6
Digital wellbeing	6	6	6	5

Components of Health or Wellness Considered a Primary Factor of Overall Wellbeing (Ranked by Percentage)

Factors of Consideration	Total Teens	U.S.	BR	DE
Physical wellbeing	1	2	2	1
Mental wellbeing	2	1	1	2
Financial wellbeing	6	6	6	4
Social wellbeing	3	3	3	3
Spiritual wellbeing	5	4	5	6
Digital wellbeing	4	5	4	5



Teens' online habits vary by country.

Teens spend a considerable amount of time in the digital world.

Across the U.S., Brazil, and Germany, roughly half of teens primarily spend their online time gaming: 54% of U.S. teens, 64% of Brazilian teens, and 49% of German teens. Besides gaming, teens report that consuming content takes up most of their time online: 47% in the U.S., 57% in Brazil, and 54% in Germany.

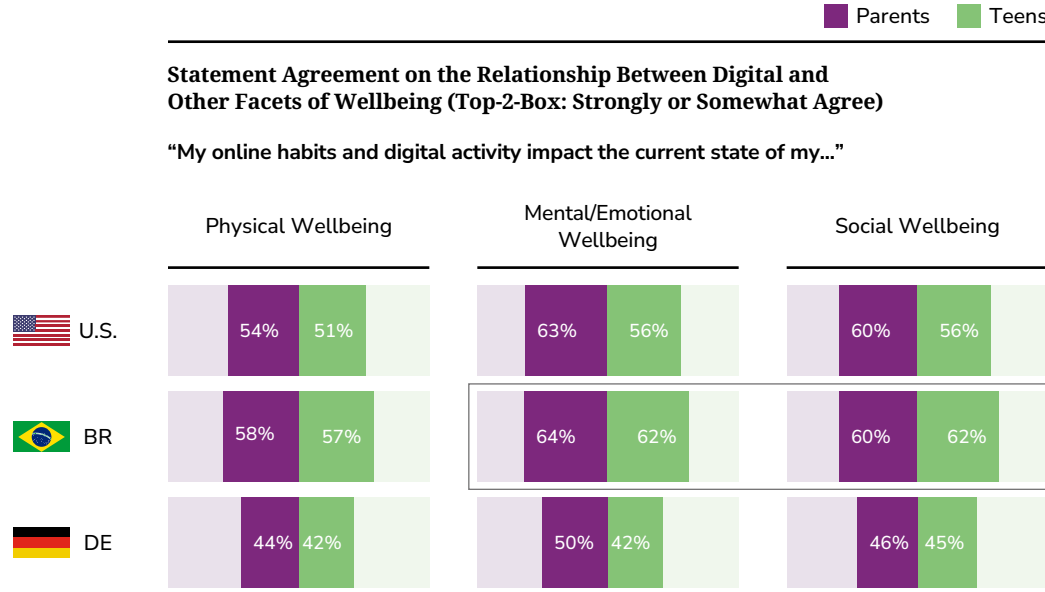
While teens are generally active digital users, notable differences emerge across countries. In the U.S., 31% of teens say they spend most of their time online actively creating content, regardless of whether they choose to post it or keep it to themselves, compared to 26% in Brazil, and 21% in Germany.

German teens report the highest engagement in connecting with others online (53%), compared to only 42% of U.S. and 30% of Brazilian teens. Brazilian teens are instead more inclined to consume content (57%), and follow influencers or celebrities online (32%). In comparison, 25% of U.S. teens and 21% of German teens follow influencers or celebrities online.

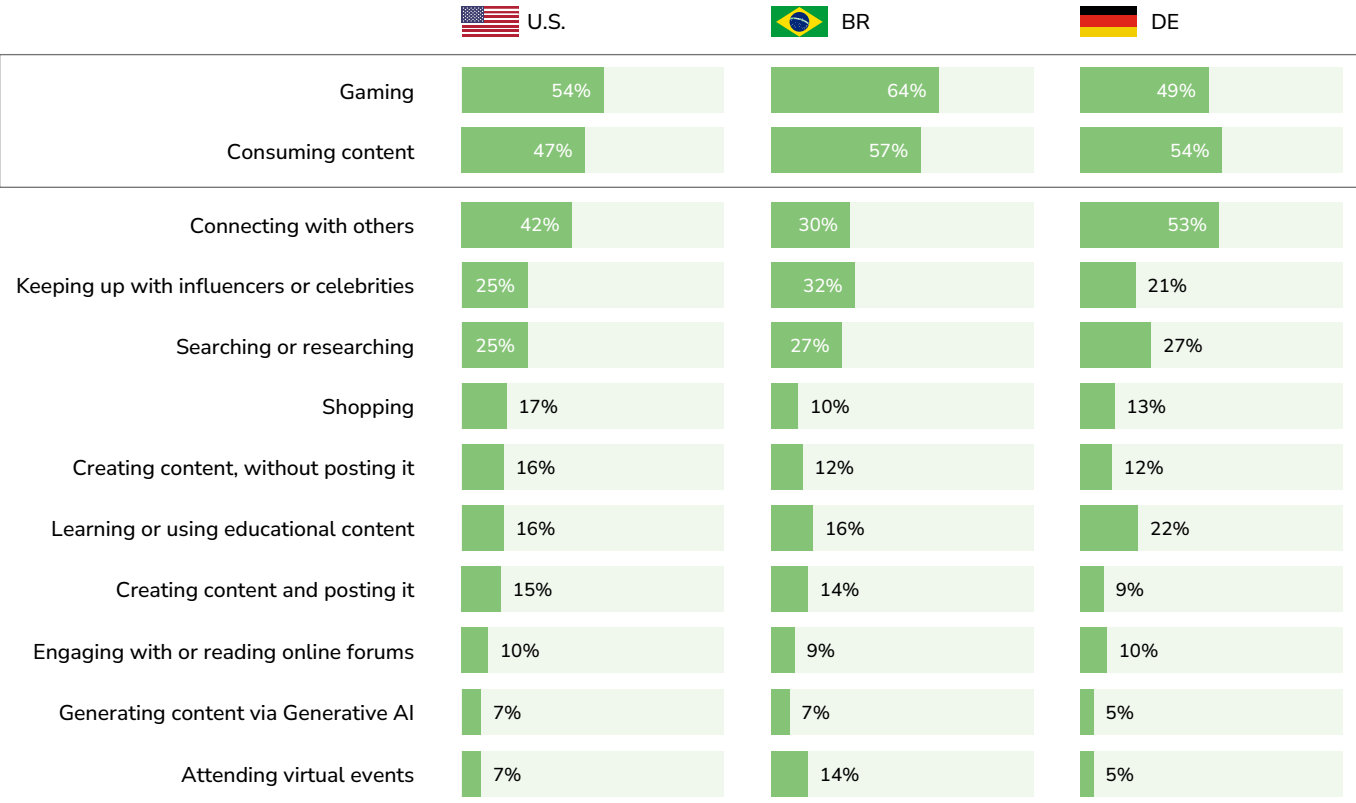
Brazilian teens also spend more time watching virtual events (14%) than their U.S. and German peers (7% and 5% respectively).

Families recognize the impact of digital activity on other aspects of wellbeing.

Families recognize that these six wellbeing factors are interconnected, with parents and teens understanding the complex interplay among physical, mental, social, financial, spiritual, and digital wellbeing. More than half of parents and teens in the U.S. and Brazil agree that their online habits impact their current physical, mental/emotional, and social health, with more than 60% of parents and teens in Brazil understanding that their online behaviors impact both their mental/emotional and social health.



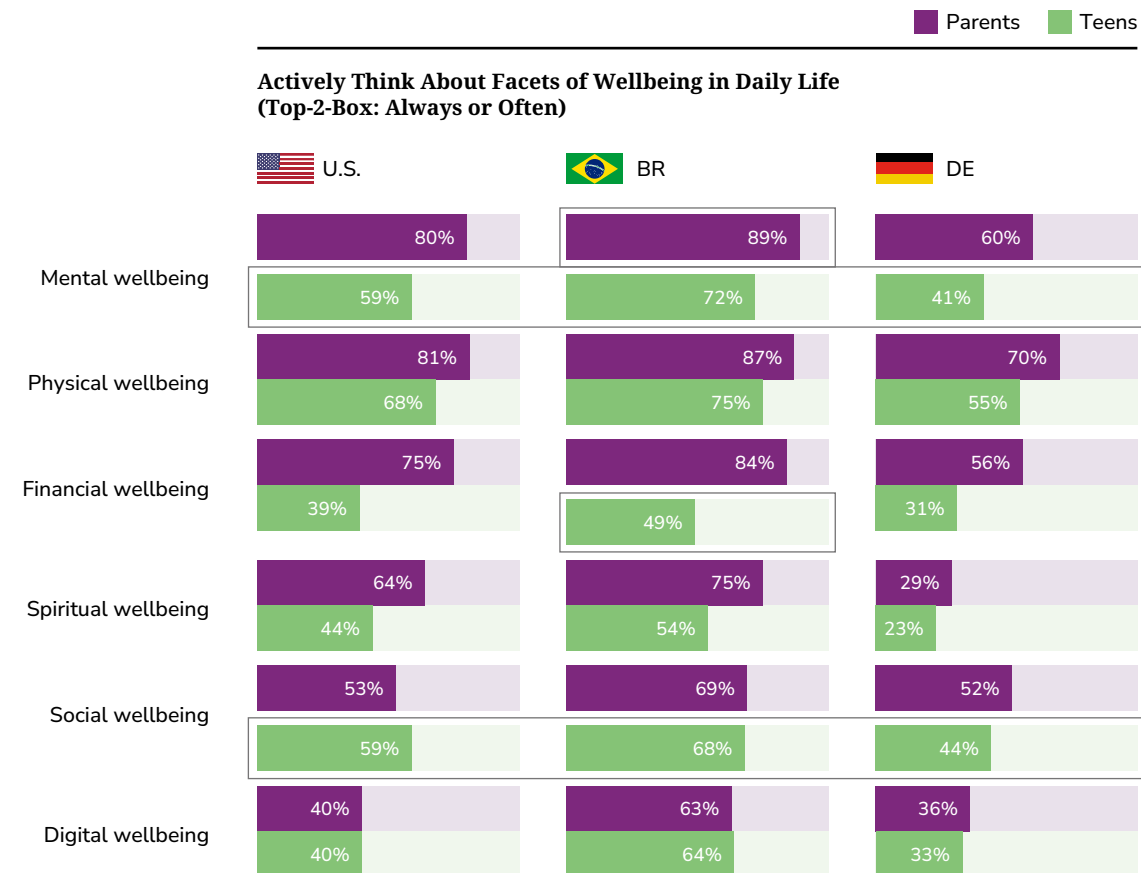
Top Activities Teens Say They Do the Most Online (Select Up To Three)
Total Teens % selected as a top activity teen does most online



Teens think about their social health as often as mental health.

Parents and teens tend to think about certain aspects of health and wellness more than others. Generally, the areas they think about most are the same ones they believe have the greatest impact on overall wellbeing. For example, parents think about their financial health as often as their physical and mental health: 89% of Brazilian parents consider their mental health “always or often” and 84% report the same about their financial health.

Teens emphasize the role of social health in their wellbeing, and generally think about it as frequently as they do their mental health. For example, 44% of German teens say they think about their social health “always or often,” compared to 41% who report thinking about their mental health as frequently.



Summing it Up

These data highlight social health as a prominent aspect of teens’ wellbeing. As teens actively consider their social health as often as they do their mental health, it becomes crucial to examine the ways these two aspects of wellbeing intersect and how the digital world might play a role. This also underscores the importance of comprehensive discussions between parents and teens about how they can support not only mental but also social health.

These data reflect an evolving understanding of wellbeing in a modern, digital world. They also give context to how teens are spending their time online and provide concrete evidence that wellbeing extends beyond physical and mental health. Families recognize that social, economic, and technological forces impact their wellbeing, even if they view their influence in different ways.

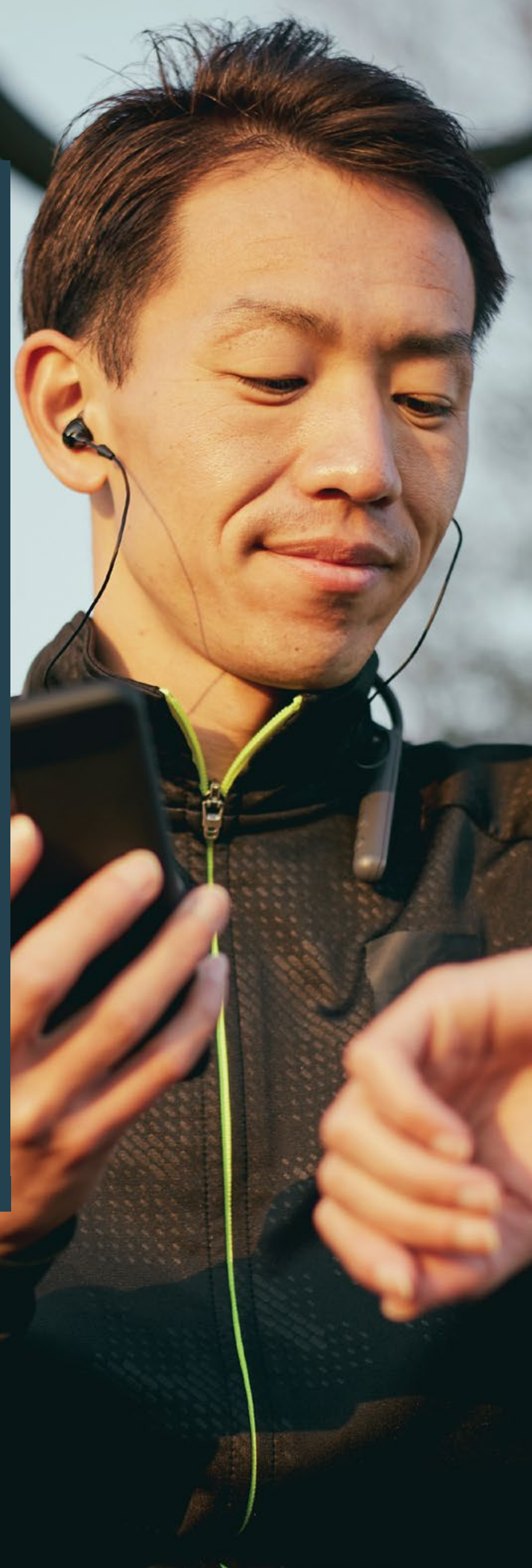
As the next section of the report will explore, teens experience challenges – but also real benefits – to their wellbeing because of digital activity.

SECTION 2

The Impact of Digital Life on Overall Wellbeing

Parents and teens are realistic about the interplay among different aspects of their health and wellbeing. They know that in some cases these factors work at cross-purposes, while at other times they reinforce each other and can impact overall wellbeing in positive ways.

This section explores the concerns as well as the benefits that families experience at the intersection of digital life and wellbeing.



Families report negative impacts of digital technology on sleep.

Respondents were asked to select the top three aspects of teens' wellbeing that are negatively affected by digital technology and devices.

Across all three countries, and among both parents and teens, sleep quality rose to the top. In the U.S., 44% of parents and 45% of teens believe teen sleep quality is negatively impacted by digital tech and devices. Brazilian parents and teens share similar beliefs (48% of parents and 45% of teens), while a smaller but still significant share of Germans agree (38% of German parents and 37% of German teens).

Beyond sleep, concerns about the impact of technology exist for different aspects of wellbeing. In the qualitative research, parents mentioned the negative impacts that technology has on teens' mood and self-esteem. However, quantitative survey data shows that sleep issues are a much greater concern than impacts to emotional health. Responses become more divided for potential effects related to other wellbeing aspects. For example, 44% of parents in the U.S. cite sleep as a top concern, while about 1 in 5 report negative impacts on mood (22%), self-esteem/body image (19%), or attention span (18%).

The remaining categories have lower, but still significant, percentages of respondents selecting them as concerns. Similar patterns are seen in Brazil and Germany, as well as among teens in all three countries, with a clear gap between concerns about sleep and those about other aspects of wellbeing.

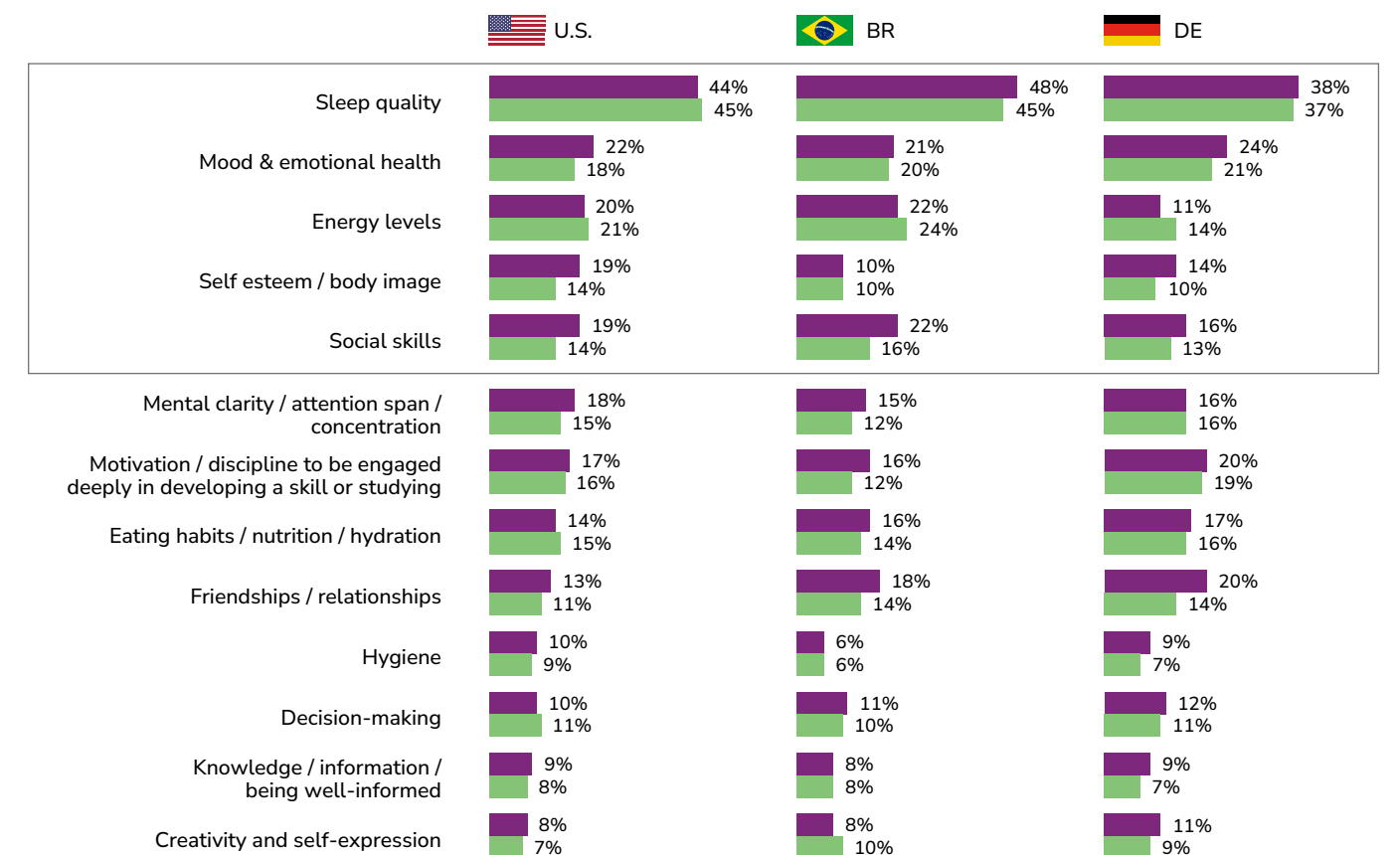


"I don't know how to manage my time [on social media]. It can hinder my concentration and disrupt my sleep and learning."

Teen, Brazil

Parents Teens

Top Aspects of Teens' Wellbeing Negatively Affected by Digital Technology and Devices (Select Up to Three)





Families continue to focus on safety.

Families also cite issues related to online safety as top concerns regarding teen wellbeing and online activity. This focus on teen online safety is consistent with previous research conducted by FOSI and other organizations.

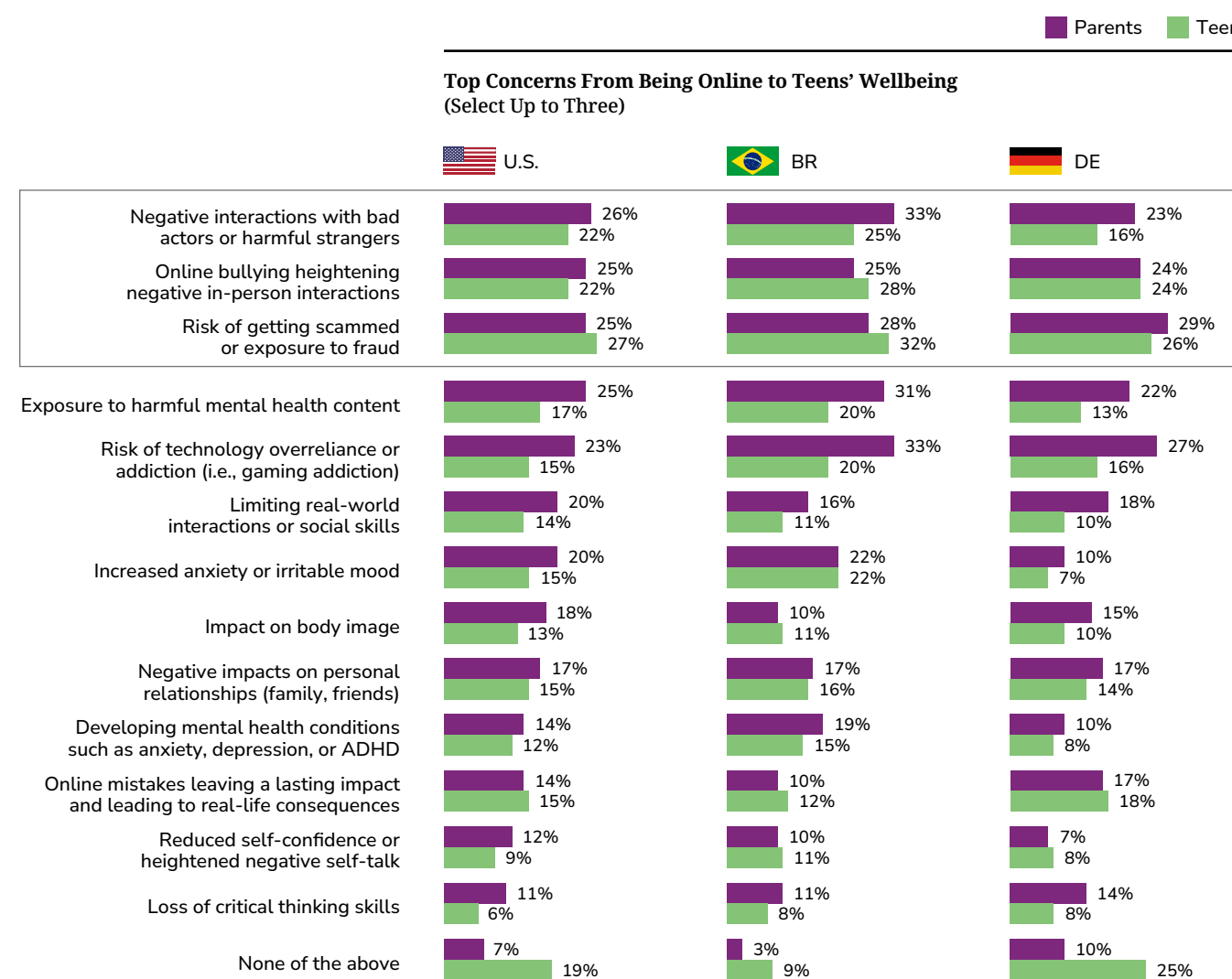
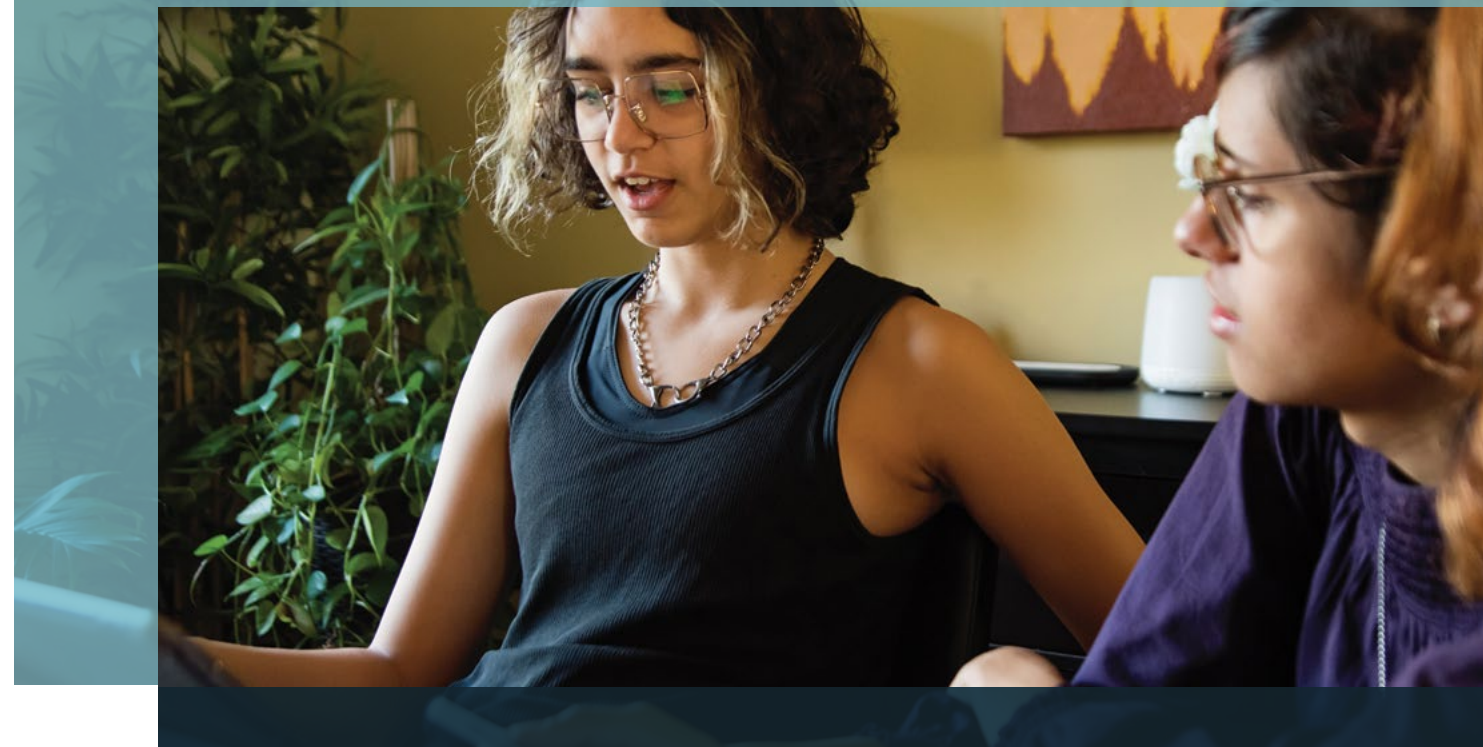
When surveyed, parents and teens were asked to select their top three wellbeing concerns related to teens' online activity. Just over one-quarter of parents and teens report that the risk of getting scammed or exposed to fraud is one of their top concerns related to their / their teens' wellbeing. This is most pronounced among German parents (29%) and Brazilian teens (32%).

Negative interactions with bad actors or strangers are also a top concern, especially among Brazilian parents (33%) and teens (26%). These interactions are least concerning for German parents (23%) and teens (16%). Bullying is another concern about one-quarter of parents and teens report, as is tech addiction among parents but not teens.

Beyond online safety, parents also acknowledge concerns related to mental or social wellbeing, although there is no clear consensus on which issues are most pressing. Some link online activity to issues such as exposure to harmful content, tech addiction, and reduced real-world interactions or social skills. Fewer parents, however, associate online activity with the loss of critical thinking skills, diminished self-confidence, mental health status, body image issues, or strained relationships.

Teens tend to place even less emphasis on concerns beyond those related to online safety. As with their parents, across countries – and even within individual countries – there is no clear consensus among teens regarding the negative impacts of online activity on their wellbeing. Some teens worry about tech addiction (15% in the U.S., 20% in Brazil, 16% in Germany). For others, there is concern that online mistakes may leave lasting consequences (15% in the U.S., 20% in Brazil, 18% in Germany). This sentiment also emerged in a few qualitative discussions, where some teens expressed fears about how a permanent digital footprint – such as a photo or interaction – could impact their personal reputation. Teens worry that, later in life, potential employers reviewing their digital presence could influence their future job opportunities.

Teens' top concerns varied greatly. No specific top concern was shared by more than a fifth of respondents across the three countries.

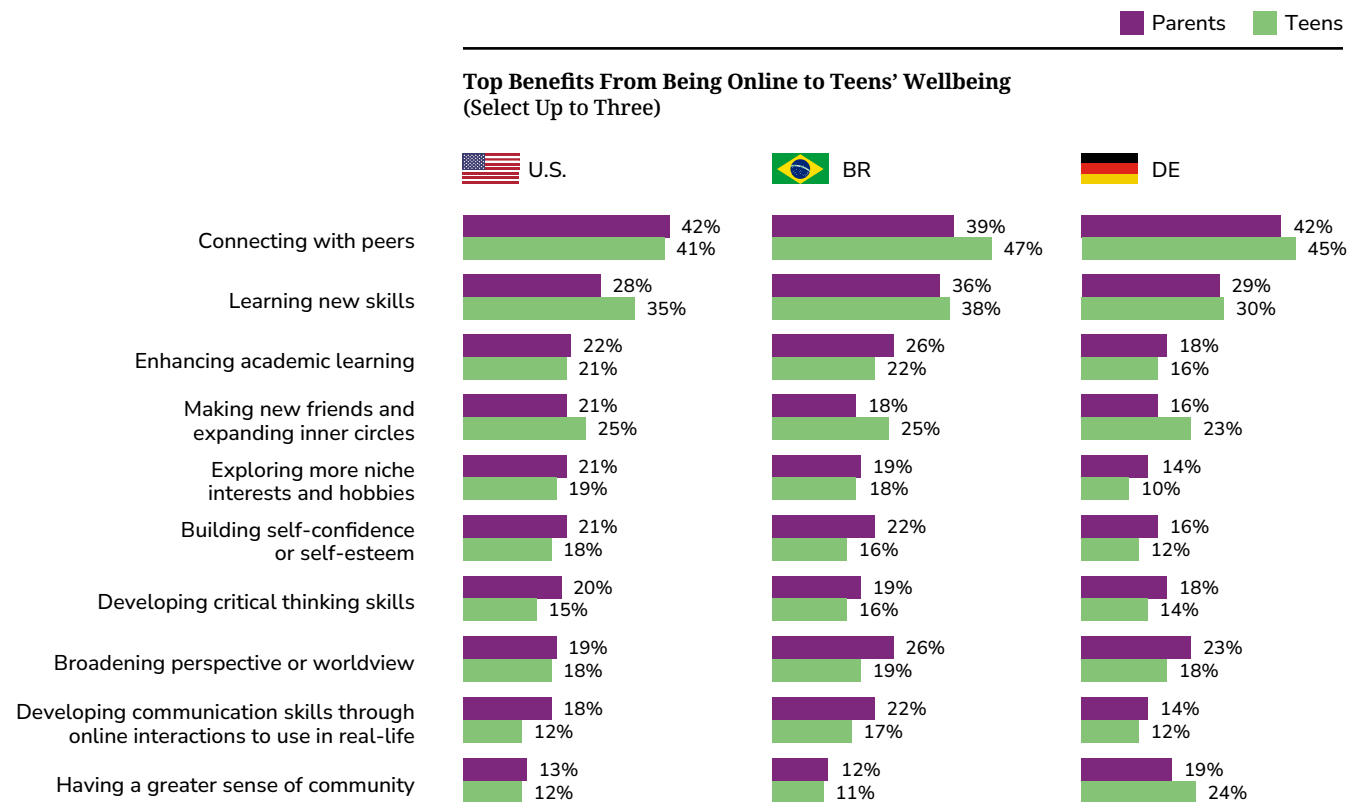


The upside: parents and teens say belonging and social connection are top benefits to being online.

Parents and teens in the U.S., Brazil, and Germany all recognize the positive role that being online plays in supporting social health and overall teen wellbeing. When asked to select their top three wellbeing benefits related to teens being online, teens in all three countries place the highest value on connecting with peers, with 41% in the U.S., 47% in Brazil, and 45% in Germany identifying this as the most significant benefit.

U.S. and German parents are in step with their teens and acknowledge connecting with peers as a primary benefit of their teens' online activity. Brazilian parents agree with this sentiment but to a slightly lesser degree than their teens. Another benefit teens emphasize is that being online allows them to make new friends and expand their social circles. Roughly a quarter of teens in the U.S., Brazil and Germany see this as a top benefit.

In Germany, parents and teens also call out the fact that being online helps foster a sense of community among teens. Some 24% of German teens and 19% of German parents believe this sense of community is one of the top benefits to being online. However, only 11-13% of U.S. and Brazilian parents and teens appreciate the same benefit.



Parents and teens anecdotally share their appreciation for the sense of belonging social media affords their teens, enabling them to establish deeper, raw connections and reducing the emotional toll of loneliness and isolation. Teens share similar sentiments for finding emotional support in social media communities.



"On social media, you end up finding people who like the same things as you and you end up chatting with them."
Teen, Brazil



"She feels like she belongs. Her friends are all there too. There's a sense of togetherness."
Parent, Germany



Families report that digital technology boosts teen knowledge, creativity, and relationships.

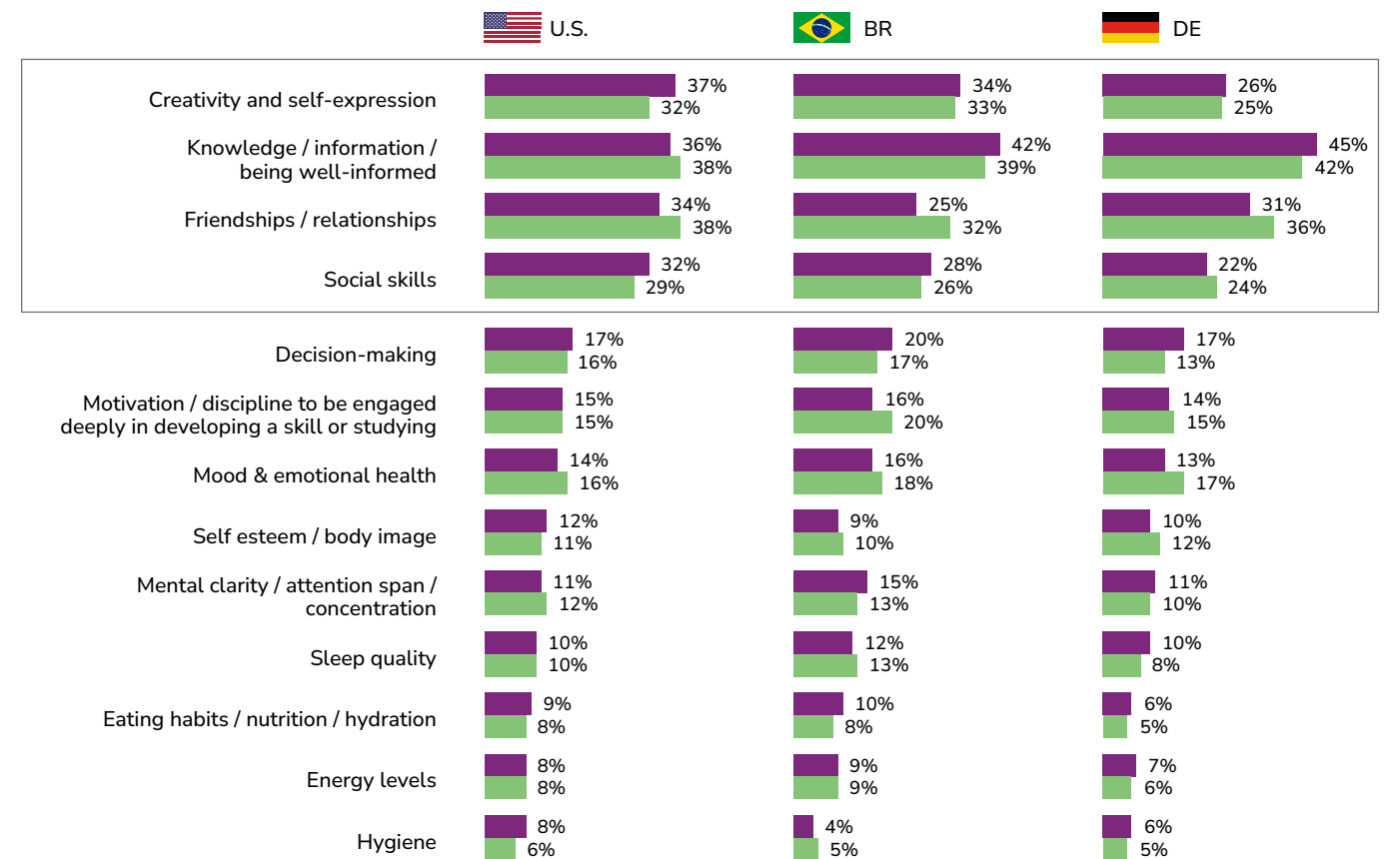
In addition to the benefits of being online, respondents were asked to select the top three ways in which digital tech positively affects teen wellbeing. In their survey responses, parents and teens focus on the impacts of knowledge, creativity/self-expression, relationships, and social skills. This was illuminated in the qualitative research, with parents describing that self-expression and creativity facilitated by digital tech have boosted their teens' confidence and self-esteem, allowed them to develop new skills, and made friends in low-stress environments.

This insight suggests that parents and teens regard tech and digital devices as critical tools for personal and social development, and while they are aware of the drawbacks of tech, they also readily acknowledge the ways that it supports teens' social health and other aspects of wellbeing.



“Emotionally he can see and witness that he is not going through puberty alone. He can research any questions about his body’s physical changes without being embarrassed or thinking this is only happening to him.”
Parent, U.S.

Parents Teens
Top Aspects of Teens’ Wellbeing Positively Affected by Digital Technology and Devices (Select Up to Three)





Teens report positive online experiences surpass negative ones.

Parents and teens know that spending time online presents young people with both positive, enriching experiences as well as pitfalls. When asked how often they experience either positive or negative situations online, the message was clear: teens in all three countries self-report that positive experiences happen more frequently than negative ones. This included a variety of situations connected to teens' emotional and social health.

For example, three-quarters (73%) of Brazilian teens report “always” or “often” feeling more connected to their friends and family after spending time online. A smaller but still significant share of U.S. teens (58%) and German teens (53%) report the same. Teens also self-report a lift in mood and feeling more relaxed as a result of spending time online.

Teens do not regularly experience as many negative impacts or situations as a direct result of being online. The most common negative situation teens self-report experiencing is the need to check their notifications, with 38% of U.S. teens, 49% of Brazilian teens, and 32% of German teens saying they feel this “always” or “often.”

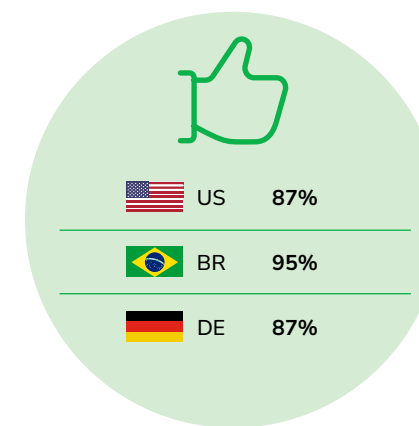
Other negative situations teens say they experience most often include thinking about being online even when offline and feeling like they have wasted time, which are more frequently mentioned by Brazilian teens (48% and 30%, respectively). Other negative situations related to online activity are significantly less frequent. For example, only 22% of U.S. teens, 25% of Brazilian teens, and 16% of German teens self-report having difficulty engaging in in-person conversations as a result of spending time online. Given the concern some parents express about online engagement potentially reducing their teens' social skills or in-person conversational abilities, it is noteworthy that few teens self-report these worries manifesting in their daily lives.



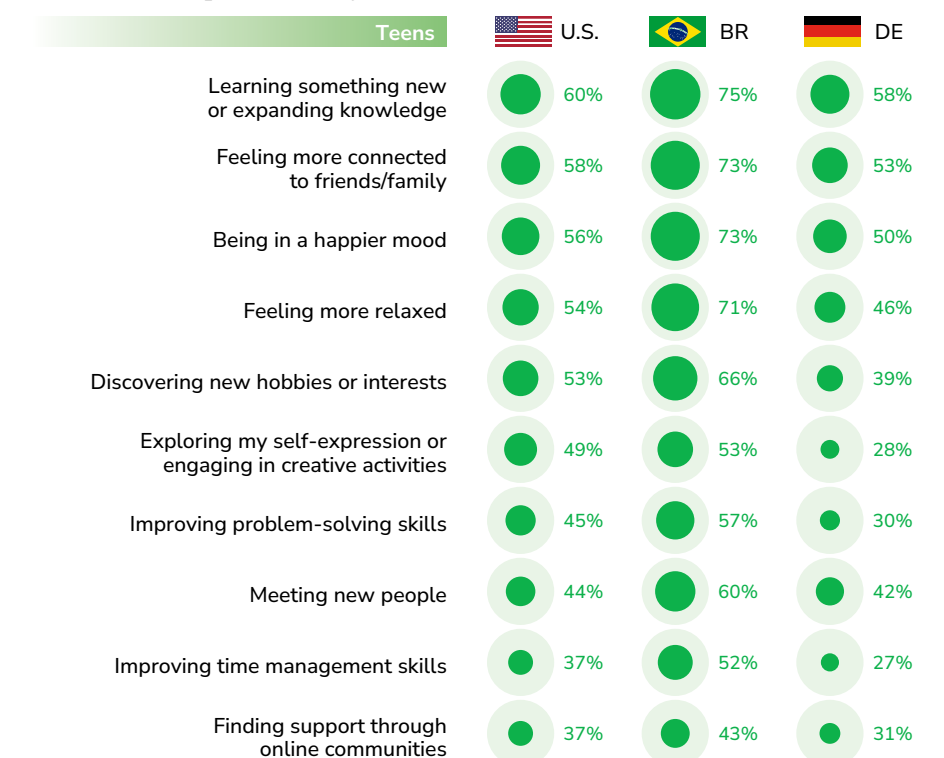
“All of these things [such as my mood, energy, sleep quality, etc.] can be positively and negatively impacted. It just depends on how you use it.”

Teen, Germany

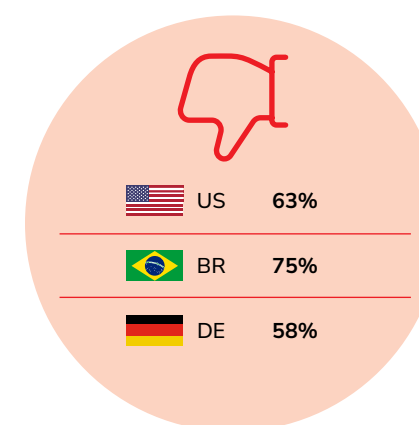
Experienced At Least One Positive Situation as a Direct Result of Spending Time Online



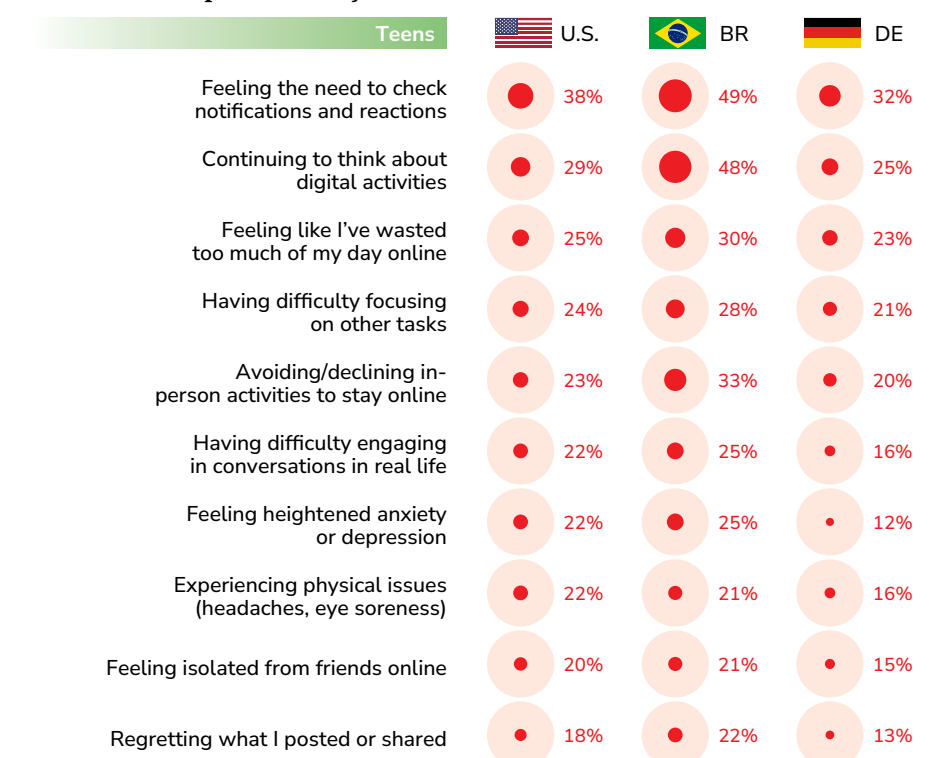
Positive Situations Teens Regularly Experience as Direct Result of Spending Time Online (Top-2-Box: Always or Often)



Experienced At Least One Negative Situation as a Direct Result of Spending Time Online



Negative Situations Teens Regularly Experience as Direct Result of Spending Time Online (Top-2-Box: Always or Often)





Summing it Up

These data reveal the bright side: positive online experiences often outweigh negative encounters. Parents and teens believe that online activity can pose great benefits to teens' social wellbeing, offering a counterbalance to potential concerns shared by diminishing social skills or negatively impacting personal relationships.

But who bears the responsibility for ensuring this balance tips in the right direction? The next section of the report will explore who parents and teens feel holds the most responsibility for promoting wellbeing—both off- and online.

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“On social media and the content there, [teens] think it’s all perfection. That doesn’t exist in real life. It needs to be more realistic to help their mental health, not frustrate them so much.”
Parent, Brazil

SECTION 3

Empowering Teen Wellbeing

Across countries, parents and teens agree that families are primarily responsible for promoting and teaching teens about their wellbeing. This belief underscores the importance of parental involvement in shaping teens' overall health and wellbeing. While external institutions, like schools, governments, and technology companies play supporting roles, families are seen as the most important source of guidance to help teens navigate the multitude of factors influencing their wellbeing.

This section explores responsibility and accountability when it comes to educating and empowering teens about their wellbeing.



Parents and teens believe they are the most responsible actors.

Around three-quarters of parents and teens in all three countries agree that parents are one of the top two players responsible for educating and empowering their teens about physical and mental health. Parents and teens are also largely aligned that teens themselves are instrumental in this effort.

This finding also extends to digital wellbeing, with both parents and teens acknowledging their shared responsibility in ensuring that teens' digital habits contribute positively to their overall health and wellbeing.

Schools, technology companies, and governments play secondary roles.

While parents and teens are recognized as the most accountable actors for teens' digital wellbeing, there is a notable expectation in certain countries for schools to play a role in this responsibility. In Brazil and Germany, 29% and 23% of parents, respectively, believe that schools are one of the top two players most responsible for educating teens about digital wellbeing, while 18% of U.S. parents share this view.

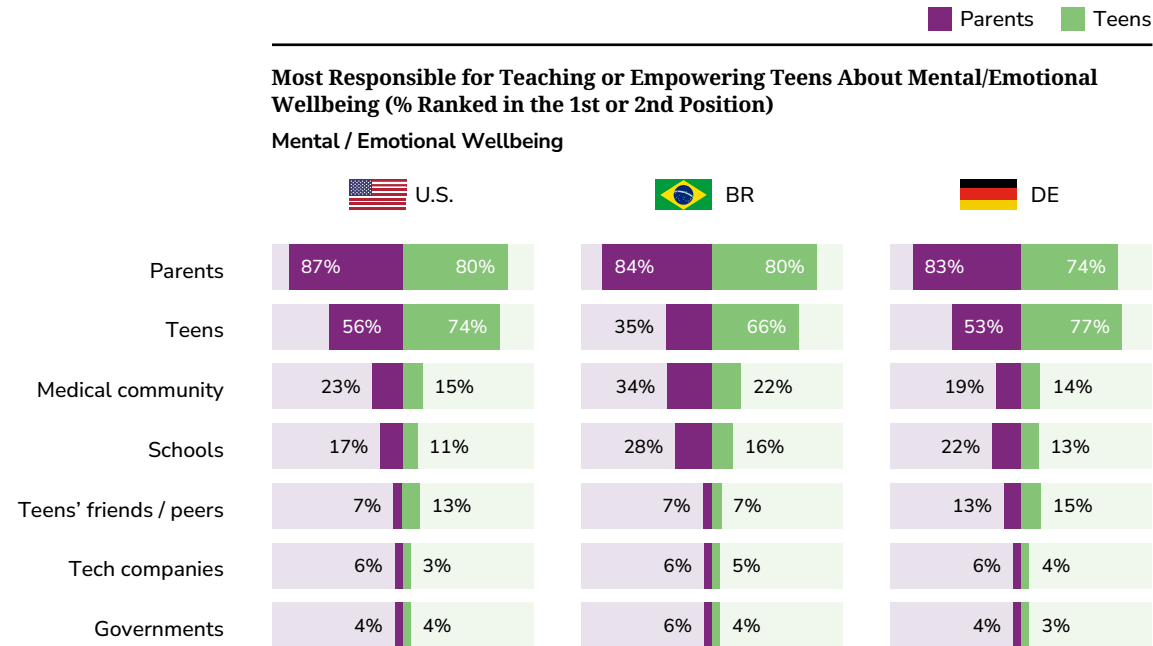
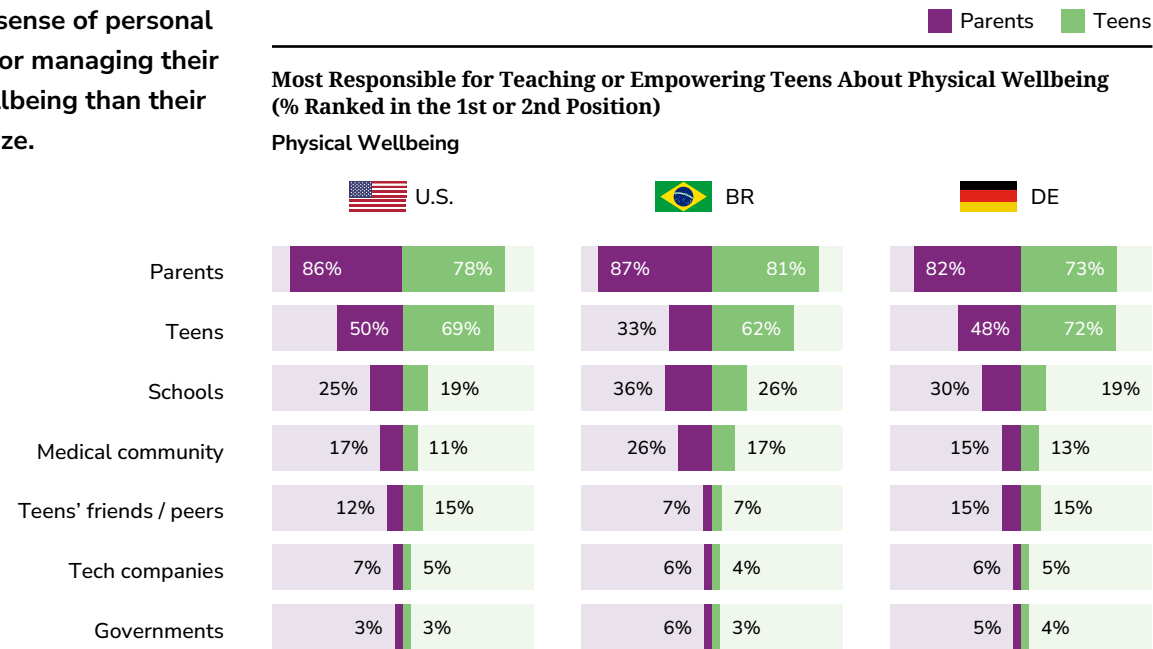
Additionally, about one in six parents across all three countries believe that tech companies should also play a primary role in guiding teens on digital wellbeing.

Far fewer parents – across all countries – rank governments as responsible players in this area, signaling a preference for more direct, personal involvement from families, schools, and the tech industry rather than from bureaucratic institutions.

Teens take greater ownership of their digital wellbeing than parents give credit for.

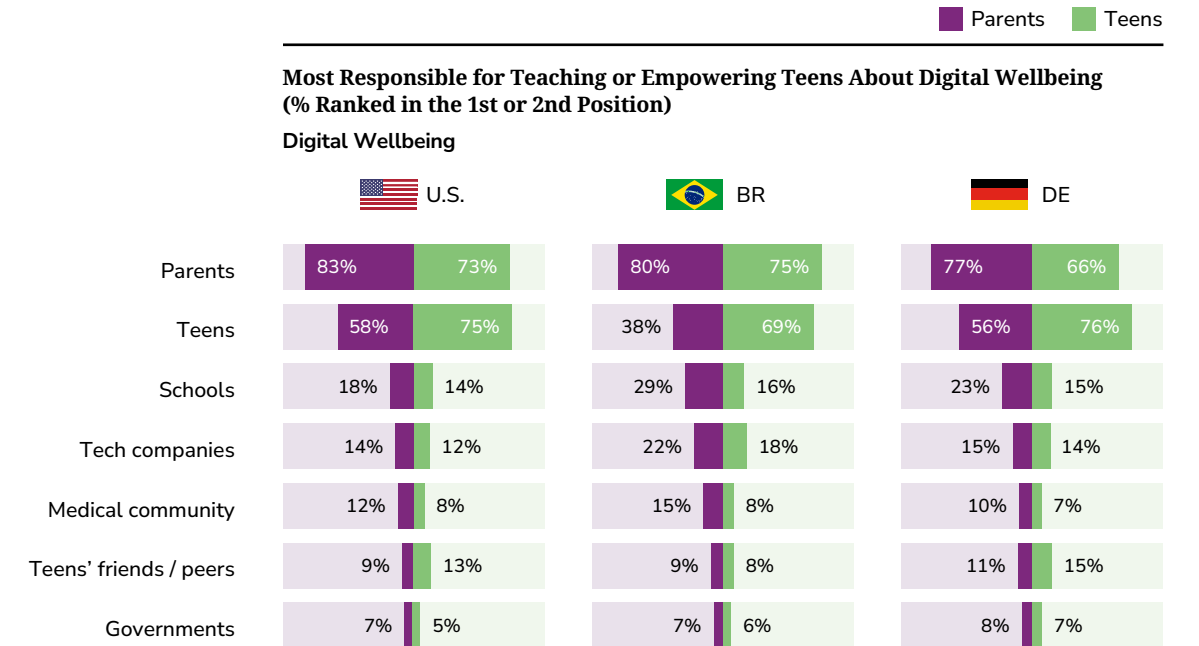
A key difference emerges in teen perceptions of personal responsibility. Teens express a much stronger sense of personal accountability for managing their own digital wellbeing than their parents recognize.

In the U.S., 58% of parents believe their teens take a leading role in managing their digital wellbeing, while 75% of teens see themselves as primarily responsible. This gap is similarly evident in Brazil and Germany, where 69% of Brazilian teens and 76% of German teens prioritize their digital wellbeing, compared to only 38% of Brazilian parents and 56% of German parents who share this view.



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“Ultimately, I think we ourselves are responsible because we are the ones who are making the decisions after all.”
Teen, U.S.

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“Parents don’t share this responsibility with schools and tech companies at all, because children are our responsibilities.”
Parent, Brazil

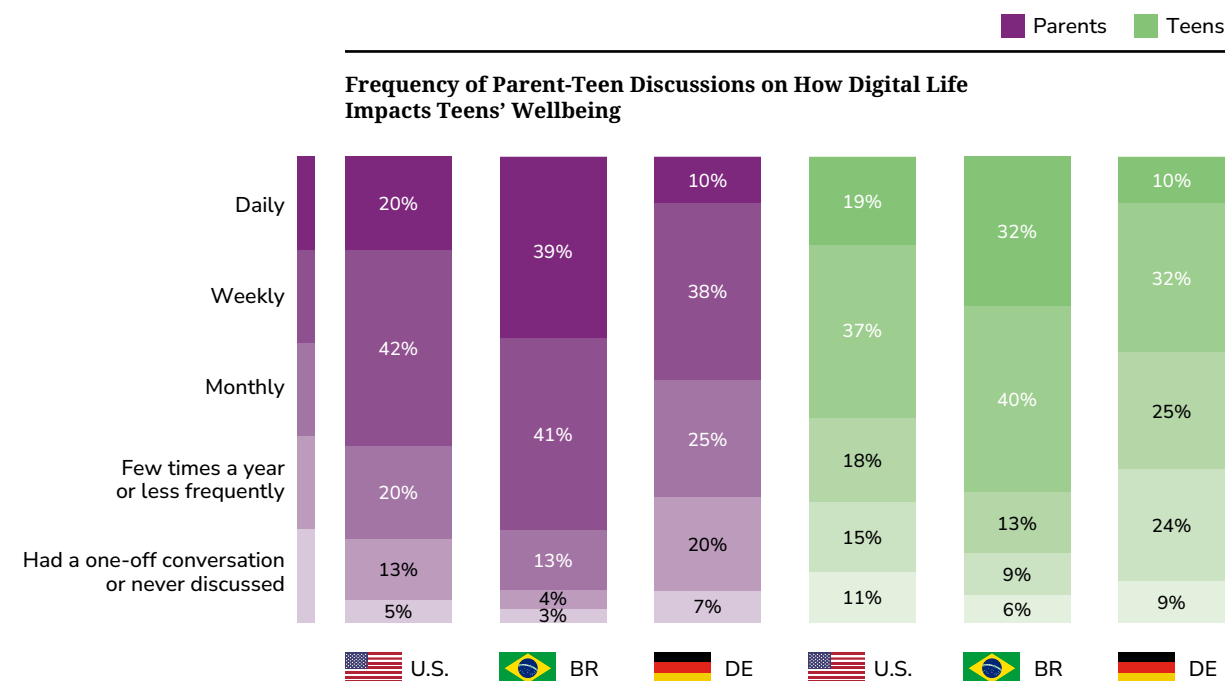


The shared belief that parents and teens are primarily responsible for digital wellbeing, coupled with the high frequency of conversations about digital habits across all three countries, reinforces the idea that their collaborative roles are crucial in securing and promoting teens' online wellbeing.



Families actively discuss how digital habits impact wellbeing.

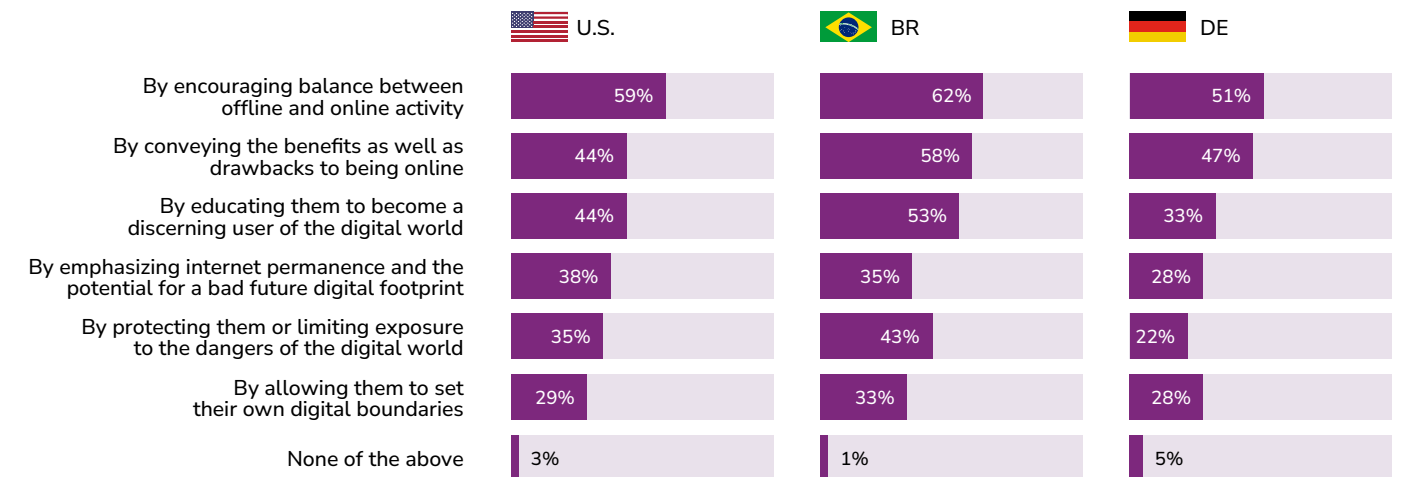
The impact of digital life on teens' wellbeing is a key topic in households across the U.S., Brazil, and Germany. Most parents and teens actively engage in discussions about how digital habits affect teens' wellbeing. In the U.S., 62% of parents report having these conversations weekly or daily, while the figure rises to 80% in Brazil. In Germany, about half of parents (48%) engage in similar discussions at least once a week, slightly less frequently than in the other two countries.



Parents prioritize empowering teens, not just restricting and protecting them.

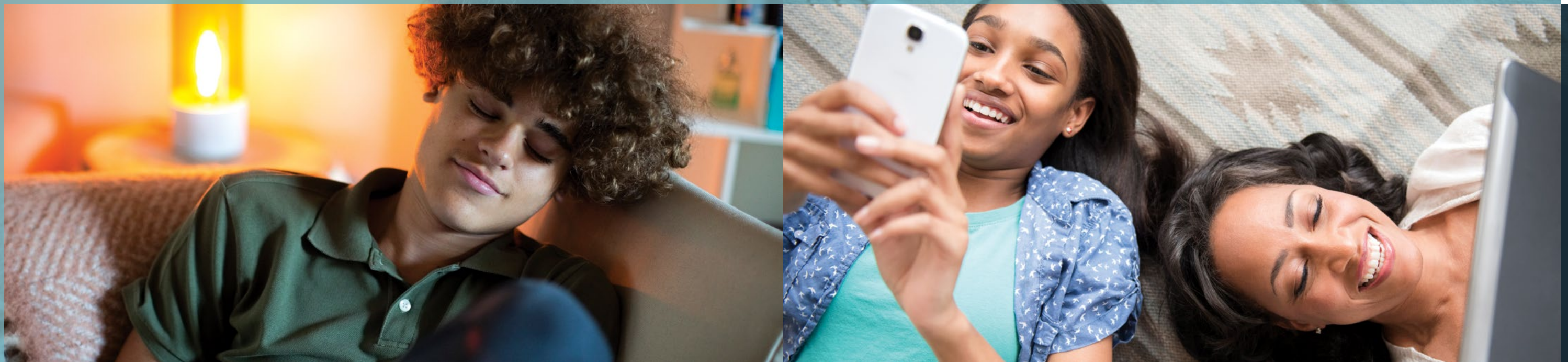
Parents prioritize encouraging, empowering, and educating their teens about digital wellbeing, rather than focusing solely on restriction and protection. The top way parents aim to empower their teens is by promoting a healthy balance of online and offline time: 59% in the U.S., 62% in Brazil, and 51% in Germany. Additionally, parents in the U.S. and Brazil (44% and 53%, respectively) recognize the importance of educating teens to be discerning in their online activities.

Ways Parents Aim to Empower Teens to Manage Their Digital Wellbeing (Select All That Apply)



"I always try to let my son know that he has the autonomy to come to me for whatever he needs, or whatever he is going through. During the pandemic, I noticed that he was having a hard time with anxiety. I talked to him, and I put him in therapy."

Parent, Brazil



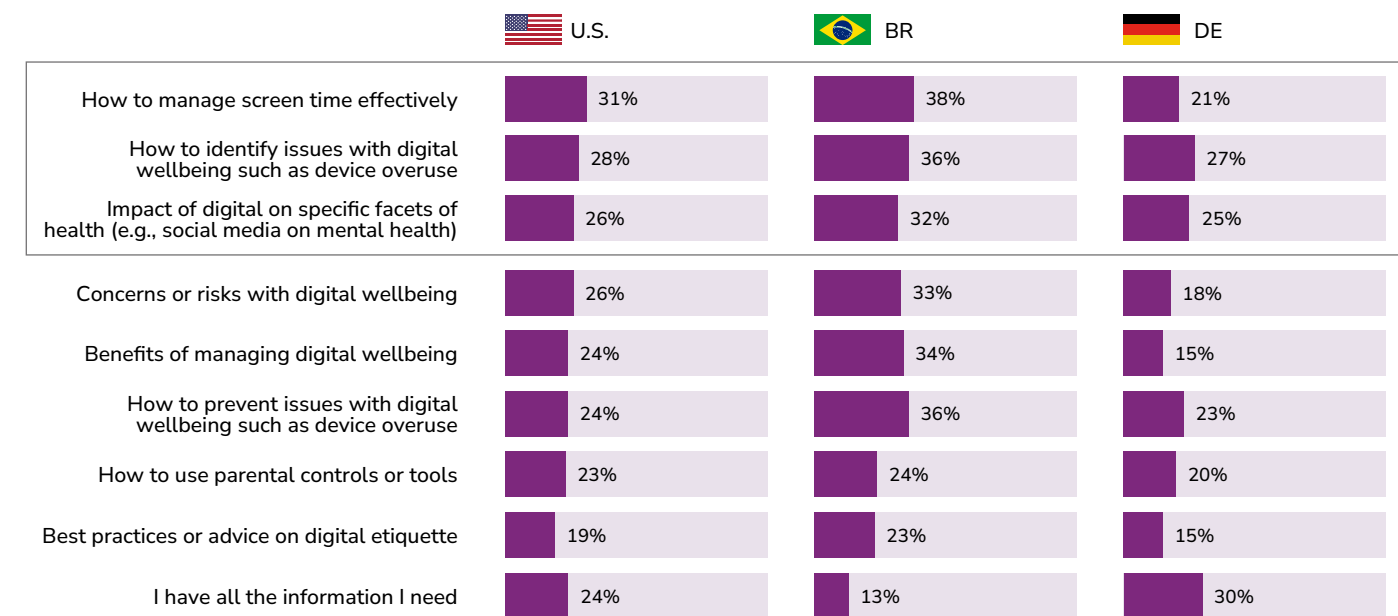
Families are receptive to resources that can enhance their discussions about digital wellbeing.

Parents across all three countries are open to a diverse range of tools and topics to better guide conversations about digital wellbeing. They are especially interested in resources to help them guide their teens to better manage screen time (31% of U.S. parents, 38% of Brazilian parents, 21% of German parents), to identify issues with digital wellbeing like device overuse (28% of U.S. parents, 36% of Brazilian parents, 27% of German parents) and to identify the impact of digital tech on overall wellbeing (26% of U.S. parents, 32% of Brazilian parents, 25% of German parents). Notably, the resources they seek closely align with the discussions they are already having, focusing on balancing online and offline lives and promoting healthier online habits.



“As a mother, I feel completely left alone. I would like more information and more support in dealing with teens and digital media.” **Parent, Germany**

Tools or Topics Parents Desire to Have to Better Guide Digital Wellbeing Conversations with Teens (Select All That Apply)



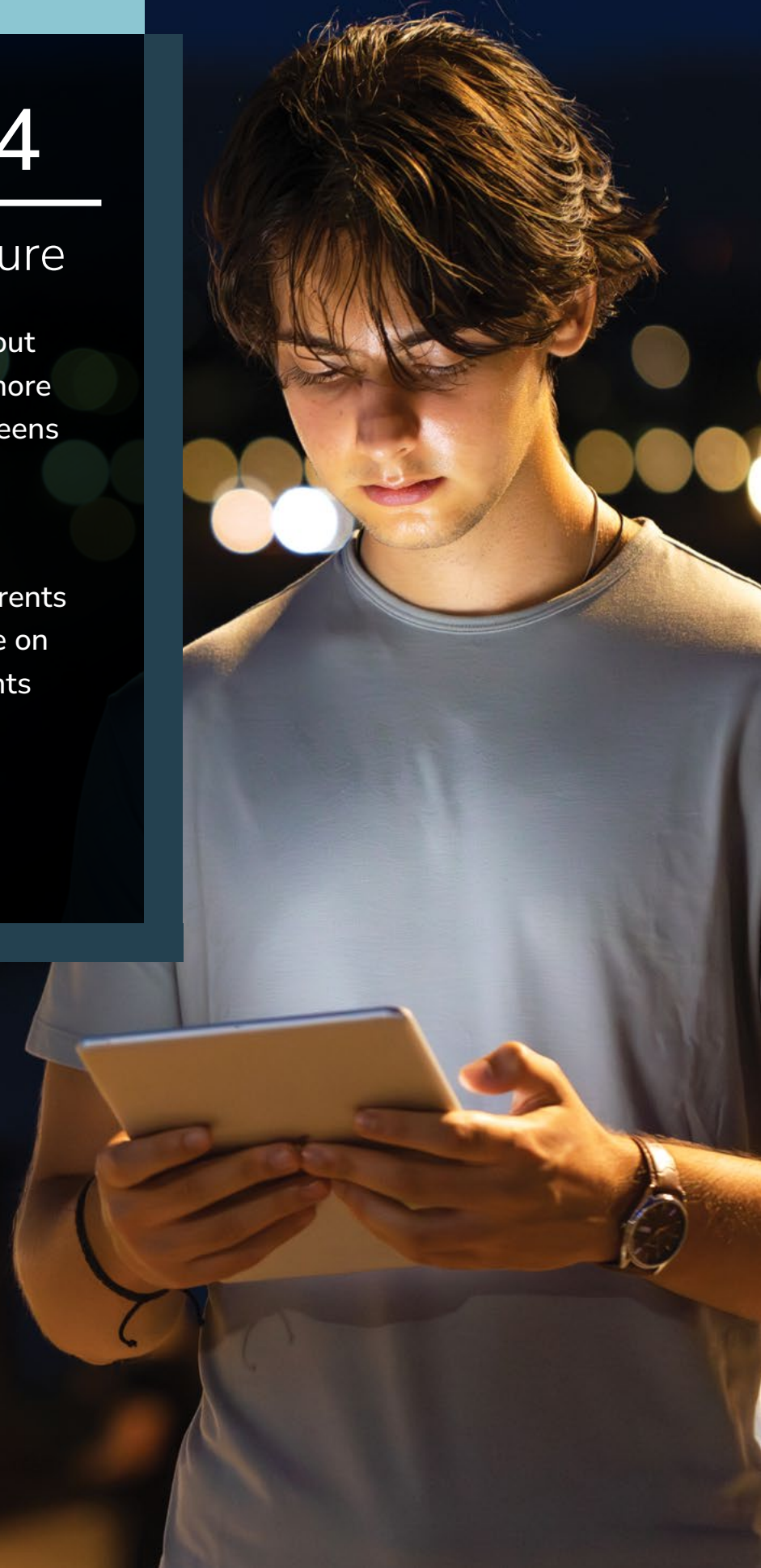
As parents seek more information to improve digital wellbeing discussions, these conversations should continue to focus on empowering teens. By incorporating actionable strategies and educational resources, parents can better guide their teens toward becoming responsible, self-regulating digital citizens.

SECTION 4

Looking to the Future

Parents want more support, but who do they want to play a more active role as they and their teens navigate the intersection of wellbeing and digital life?

This section explores who parents and teens believe should take on the role of empowering parents and teens in their pursuit of digital wellbeing.



Beyond family and friends, perceptions of support vary.

Teens in the U.S., Brazil, and Germany overwhelmingly feel supported by their parents regarding their digital wellbeing. A smaller but still sizable portion of teens in the U.S. and Brazil (71% in each country) look to their friends as a valued source of support across these countries.

Beyond family and friends, however, the degree to which teens—and parents—feel supported by schools, the medical community, tech companies, and governments varies greatly by country.

Families feel supported by schools in the U.S. and Brazil.

Most U.S. and Brazilian parents and teens believe schools support teens' digital wellbeing. This figure is highest in Brazil, with 61% of parents and 61% of teens feeling extremely or very supported by schools on topics surrounding digital wellbeing. In the U.S., a slight majority also shares this sentiment, with 52% of parents and 54% of teens expressing the same support. This figure is markedly lower in Germany, with only 34% of both German parents and teens feeling this high level of support from the education systems.

Perspectives on tech companies' support differs across countries.

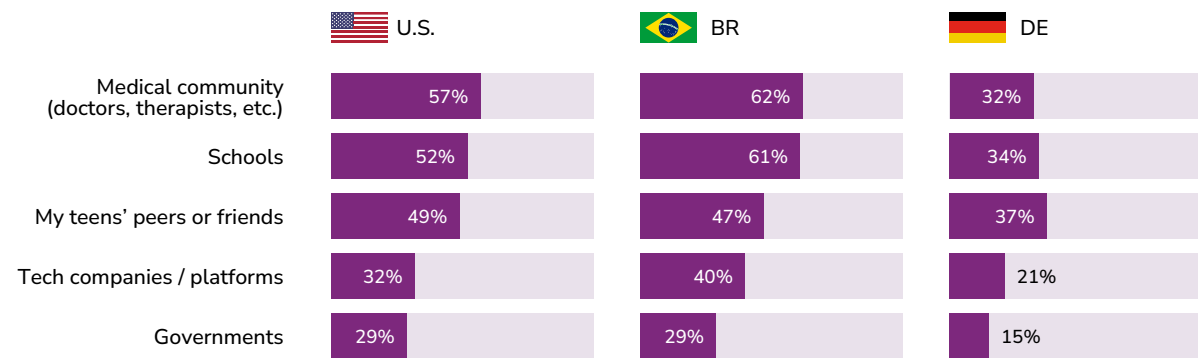
Many families do not feel that tech companies provide a high degree of support regarding teens' digital wellbeing.

Brazilians perceive the strongest support, with 40% of parents and 46% of teens feeling "extremely" or "very" supported by tech companies. Figures in the U.S. and Germany are notably lower, where roughly one-third of U.S. parents and teens and less than a quarter of German parents and teens feel these high levels of support from tech companies related to teens' digital wellbeing.

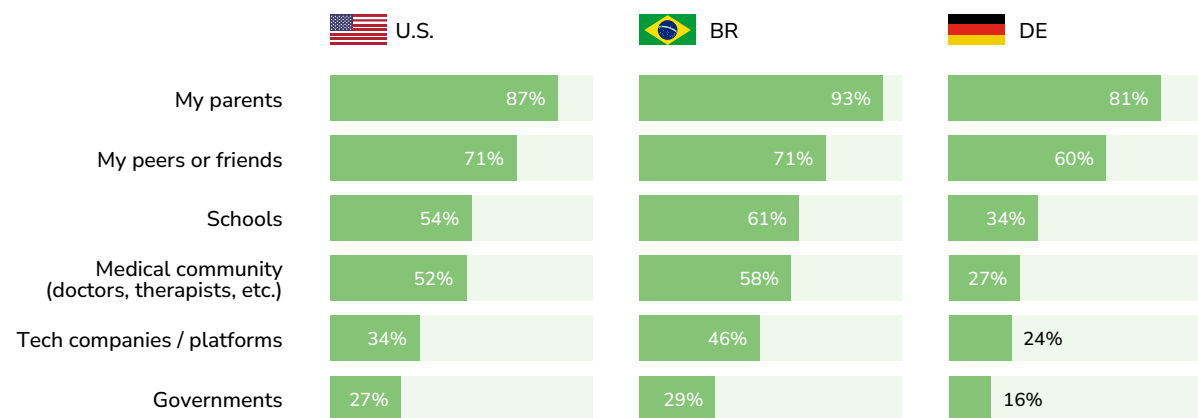
Families feel least supported by governments.

Interestingly, parents and teens in all three countries feel least supported in teen digital wellbeing by governments. Less than 3 in 10 parents in the U.S. and Brazil (29% each) as well as 27% of U.S. teens and 29% of Brazilian teens feel extremely or very supported by government bodies. An even smaller share, only 1 in 10 German parents and teens (15% and 16% respectively), admit the same level of support from governments.

Level of Support Parents Feel by Stakeholders Related to Teens' Digital Wellbeing (Top-2-Box: Extremely or Very Supported) – Parents



Level of Support Teens Feel by Stakeholders Related to Teens' Digital Wellbeing (Top-2-Box: Extremely or Very Supported) – Teens

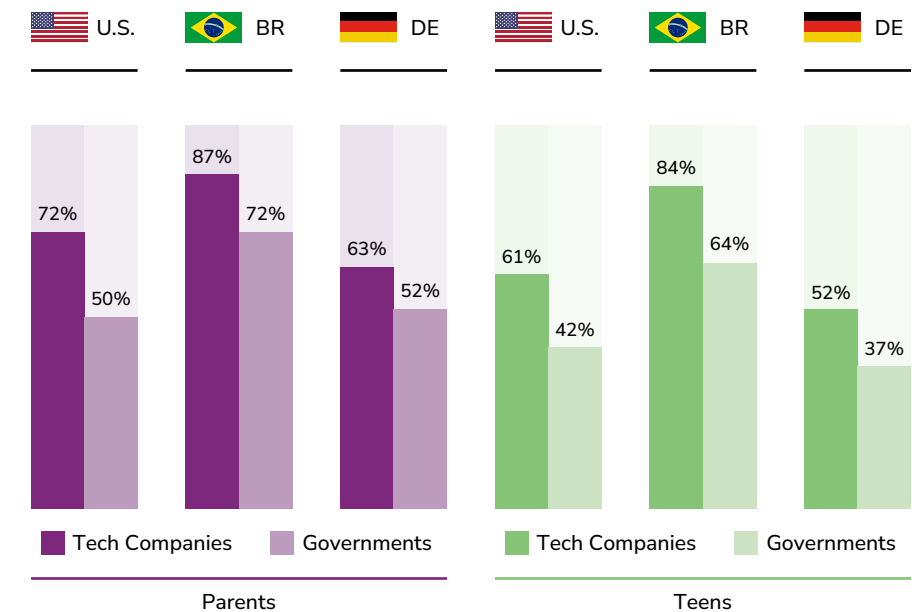


Future support: families welcome even more involvement from tech companies over governments.

When asked how they would feel if tech companies and governments took a more active role in promoting and supporting teens' digital wellbeing, the message was clear: parents and teens in all three countries welcome even more involvement from tech companies over government

This is particularly true in Brazil, where 87% of parents express a "very" or "somewhat" positive view on increased support from tech companies, compared to 72% who feel similarly about government support. Brazilian teens show a greater preference, with 84% expressing positivity toward even more support from tech companies, while only 64% say the same about government involvement.

Sentiment Parents and Teens Express About Tech Companies & Governments Taking a More Active Role in Promoting/Supporting Teens' Digital Wellbeing (Top-2-Box: Very or Somewhat Positive)



“Companies who produce devices, services, and apps know best what they are offering and can take a bigger role.”
Parent, Germany

“[Tech companies] could help. I think any exposure to wellbeing and just saying, ‘hey, this is how digital impacts your wellbeing’, can only be a positive thing. I think the more it gets put out there, the more people learn about it. And the more exposure it gets, the more people have an understanding.” **Parent, U.S.**

Families express strong interest in tech-led wellbeing solutions.

Families' openness to increased involvement from tech companies extends beyond information and resources.

Parents and teens express strong interest in trying new tech solutions and features designed to support teens' digital wellbeing.

Parents tend to be most interested in features and tools focused on online safety, such as default privacy settings to protect teens' personal information, age-gated content, and media literacy programs so teens can better identify harmful content. This finding lines up with parents' biggest wellbeing concerns noted earlier, e.g., scams and bad actors.

Beyond tools to promote online safety, there is also strong interest in measures that can actively promote digital wellbeing such as reminders to help teens know when they need to take a break and content that will boost their mood.

While parents' and teens' interests are generally aligned, teens indicate more openness to trying certain tools than their parents. Digital apps that can help young people practice communication skills are regarded as one of the top five solutions among teens, with 62% of U.S. teens, 82% of Brazilian teens, and 54% of German teens showing interest. Teens are also interested in sites or apps that could help them learn about digital wellbeing to a greater degree than their parents. This interest in tools to help educate teens about digital wellbeing is particularly pronounced in Brazil, among 82% of teens.

Qualitative insights reveal that teens are generally unfamiliar with the term "digital wellbeing." Some interpret it as making healthy digital choices or managing their time online with the aim of reducing negative outcomes. This limited familiarity with the concept may drive teens' interest in apps or websites that could clarify or enhance their understanding of how to maintain a balanced digital life.



"I've heard the term digital wellbeing before. I think it means healthy usage of social media or apps, but not spending too much time on your phone."
Teen, U.S.



Parents' Interest in Trying Features or Tools to Support Teens' Digital Wellbeing (Top-2-Box: Extremely or Very Interested) – Top Six Features

U.S.	BR	DE
84% Default privacy settings to protect personal information	93% Default privacy settings to protect personal information	79% Default privacy settings to protect personal information
80% Age limits / filters for content	92% Media literacy education to identify harmful content	77% Media literacy education to identify harmful content
77% Media literacy education to identify harmful content	92% Providing information on mental health resources / support	76% Age limits / filters for content
77% Offering reminders to take a break	91% Age limits / filters for content	73% Offering reminders to take a break
77% Suggesting content that will positively impact mood / behavior	90% Suggesting content that will positively impact mood / behavior	68% Apps limiting notifications at certain times of day
76% Apps limiting notifications at certain times of day	90% Offering reminders to take a break	68% Suggesting content that will positively impact mood / behavior

Teens' Openness to Trying Features or Tools to Support Their Digital Wellbeing (Top-2-Box: Extremely or Very Open) – Top Six Features

U.S.	BR	DE
73% Default privacy settings to protect personal information	84% Default privacy settings to protect personal information	62% Media literacy education to identify harmful content
65% Suggesting content that will positively impact mood / behavior	83% Suggesting content that will positively impact mood / behavior	62% Default privacy settings to protect personal information
64% Media literacy education to identify harmful content	83% Media literacy education to identify harmful content	55% Suggesting content that will positively impact mood / behavior
62% Offering reminders to take a break	82% Apps or features that allow me to practice communication	55% Offering reminders to take a break
62% Apps or features that allow me to practice communication	82% Suggesting sites / apps where I can learn about digital wellbeing	54% Apps or features that allow me to practice communication
58% Suggesting sites / apps where I can learn about digital wellbeing	81% Providing information on mental health resources / support	52% Suggesting sites / apps where I can learn about digital wellbeing



Summing it Up

Teen interest in honing communication skills and learning about digital wellbeing lines up nicely with the insight presented at the beginning of this report, where teens see social and digital health as critical components of overall wellbeing. These findings, combined with the desire for industry rather than government involvement, suggest that tech companies have an opportunity to innovate new tools and features to support social and digital wellbeing.

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"[My teen and I] talked about balancing social with digital aspects of life, teaching families to use both together. Parents need to understand its importance and how children use digital, positively or negatively."
Parent, U.S.

Implications and Actions

For Parents

Broaden and deepen wellbeing conversations.

Parents and teens agree about the relevance of physical and mental health to wellbeing. However, both groups have more to learn from each other about other components of wellbeing. Parents should strive to better understand the critical role that social health plays in teens' lives, and teens would benefit from better understanding how and why financial health matters to their parents. Parents, who view digital wellbeing as the least influential on their own wellbeing, should learn from their teens about its critical importance on overall health. These conversations will create the mutual understanding needed to support a well-rounded approach to wellbeing.

Empower teens toward the positives.

This study shows that parents see both the concerns (e.g., scams) and the benefits (e.g., social connection, learning) of being online. To empower teens toward positive online experiences and a sound approach to digital wellbeing, parents should balance conversations about the risks with frequent, open discussions about the benefits. Parents should acknowledge the positives and make it clear that they understand and support online activities that enhance their teens' overall and digital wellbeing.

Acknowledge shared responsibility.

Teens and parents view the family unit as holding the primary responsibility for ensuring teen wellbeing. Engage in discussions about what this shared responsibility implies for both parties and what it means across the different aspects of wellbeing (e.g., physical, mental, social, financial, spiritual, and digital). As part of this effort, parents should recognize that teens report feeling a stronger sense of ownership and responsibility for their own digital wellbeing than parents give them credit for. This sense of responsibility should be fostered and supported.

Address concerns about technology's impact on sleep.

Sleep is cited as the top aspect of teens' wellbeing that is negatively affected by digital technology and devices. Parents should prioritize tactics and strategies with their teens that promote healthy tech use, especially before bed. Parents should encourage mindful digital habits with the aim to improve teens' sleep quality and overall wellbeing.



For Industry

Connect digital to wellbeing.

There is an opportunity to help parents and teens connect the dots and better understand both the positive – and potential negative – influence of digital habits on other important aspects of wellbeing. For example, how do digital habits relate to a person's financial wellbeing, and what practices can help positively influence it? How do digital habits relate to social health, and how can digital boost teens' relationships? Present practical advice on how to enhance other aspects of wellbeing through digital means.

Elevate the conversation.

There is an opportunity for industry to include and amplify wellbeing in a digital world as part of their online safety efforts. While safety will always be critical, this inclusion could resonate with parents and teens who view digital as part of a broader, multi-faceted concept of wellbeing and align with parents' goals to foster a healthy balance between online and offline activities.

Champion digital wellbeing.

Parents and teens in all three countries welcome even more involvement from tech companies over government in supporting teens' digital wellbeing. Embrace this role by not only innovating new products or solutions but also reframing and amplifying existing efforts to educate and empower families. Make digital wellbeing the center of innovation, communications, and strategy – or be disrupted by those firms that do.

Increase collaboration.

Engage and collaborate with professionals advocating for physical, mental and emotional, social, and financial wellbeing. Elevate digital wellbeing to equal standing with other aspects of wellbeing in the cultural conversation and look for ways to conduct joint research, support each other's activities, and work together toward a holistic approach to teen wellbeing.

Simplify solutions.

Industry leaders should explore ways to help parents gain a more holistic view of teen wellbeing. Rather than relying on an unwieldy number of disparate guidelines, tools, features, and apps, how can industry empower parents to navigate and support the different aspects of their teens' wellbeing?



For Policymakers

Think beyond bans.

Young people continue to have positive experiences online and report real benefits to their wellbeing. This is an important finding for policymakers to consider as they craft more nuanced policies in this space. Thoughtful restrictions, not blanket bans, are the right way to proceed.

Continue to fund research.

Congress made great progress towards crafting evidence-based online safety policies when it passed the Children and Media Research Advancement Act in 2022 and should continue to fund research year after year.

Listen to the experts.

Online safety takes a whole-of-society approach, and policymakers should listen to medical professionals, academics and researchers, technologists, educators, law enforcement, families, and especially young people themselves when crafting online safety policies.

Appendix

Introduction.

This study was conducted by Kantar on behalf of the Family Online Safety Institute (FOSI) and was sponsored by Google. The study highlights self-reported data from parents and teenagers among three countries: the United States, Brazil, and Germany.

Sample definition & specs.

The Qualitative study surveyed parents of teens aged 13-17. N=24 parents and N=24 teens participated in the Qualitative discussions. In each of the three markets, 8 parents and 8 teens were qualitatively surveyed. Two focus groups were held in each market, with 4 parent and 4 teen attendees in each. In the Quantitative study, parents and their teens were surveyed across the same three markets: U.S., Brazil, and Germany. N=3,000 total responses were captured (as combined parent and teen responses), or n=1000 combined household responses per country.

To qualify for the main quantitative survey, parents were defined as either the parent or legal guardian of a teen aged 13-17. Qualifying parents are 30-79 years old. The parent also holds the primary or shared decision-making role when it comes to overall parenting responsibilities as well as their child's technology usage. Qualifying respondents also include parents whose teenagers live in the parent's household part-time or full-time. Other qualifying criteria include:

- Have high speed Internet at home
- Parent allows teen technology use and screen time
- Teen has access to at least one of the following: smartphone, tablet, laptop, or personal computer
- Parent cannot work in advertising, market research, media, technology, or government professions
- Mix of household types (single child/multi-child, dual-working parent/ single-working parent, single parent/multi-parent)
- Mix of socio-economic levels

Data collection and fielding.

Kantar fielded 4 qualitative focus groups in the U.S. (two with parents and two with teens) from July 17 to July 18, 2024. 4 focus groups were also conducted in each of the other two countries, Brazil and Germany, with 2 groups of parents and 2 with teens in each. Both Brazil and Germany focus groups were held from July 24 to July 25, 2024.

The online quantitative survey was soft launched on September 13, 2024, in the U.S. and September 24, 2024 in Brazil and Germany. The survey closed fielding on October 16, 2024.

Sampling.

Sampling was monitored during fielding to help ensure the final General Population sample resembled the target population. No weights were applied in any of the three markets. This survey was only available to individuals with internet access and therefore the results may not be generalizable to those households without internet access.

Detailed Question Information

Questions where the full list of response options presented to parents and teens are not charted in the main report are listed here:

Full List of the Top Benefits From Being Online to Teens' Wellbeing

1. Broadening their perspective or worldview
2. Fostering a sense of creative self-expression
3. Learning new skills
4. Exploring more niche interests and hobbies
5. Making new friends and expanding inner circles
6. Accessing support networks or groups otherwise inaccessible offline
7. Having a greater sense of community
8. Connecting with peers
9. Developing communication skills through online interactions that can be used in real-life situations
10. Developing critical thinking skills
11. Enhancing academic learning
12. Building self-confidence or self-esteem
13. Accessing mental health resources and support
14. Exploring identity or truer sense of self
15. None of the above

Full List of the Top Concerns From Being Online to Teens' Wellbeing

1. Increased anxiety or irritable mood
2. Negative impacts on personal relationships (family, friends)
3. Online bullying heightening negative in-person interactions
4. Mistakes made online leaving a lasting impact and leading to real-life consequences
5. Impact on body image
6. Reduced self-confidence or heightened negative self-talk
7. Exposure to harmful mental health content
8. Risk of getting scammed or exposure to fraud
9. Risk of technology overreliance or addiction (i.e., gaming addiction)
10. Developing mental health conditions such as anxiety, depression, or ADHD
11. Negative interactions with bad actors or harmful strangers
12. Limiting real-world interactions or social skills
13. Loss of critical thinking skills
14. None of the above

Full List of Features or Tools Parents Would Be Interested in Trying to Support Teens' Digital Wellbeing

1. Displaying warnings on splash screens with tips to improve digital wellbeing
2. Offering reminders or suggestions to take a break (e.g., stretch, drink water) after spending an extended period of time online
3. Reducing or preventing doomscrolling (e.g., ability to turn off infinite scrolling on social media)
4. Providing more in-app or in-device information on mental health resources and support
5. Apps limiting notifications at certain times of day (e.g., before bed)
6. Providing a data dashboard tool that shows wellbeing metrics across digital apps in one place (physical metrics, mental health metrics, etc.)
7. Features that closely monitor my teen's social media interactions
8. Suggesting sites or apps where my teen can learn about digital wellbeing
9. Apps or features that allow my teen to practice their communications skills online to be applied in real-life interactions
10. Suggesting content or activities that will positively impact my teen's mood or behavior (e.g., boost their self-confidence or self-esteem)
11. Default privacy settings that protect personal information from being shared
12. Age limits / filters for content teens can see or post
13. Media literacy education for teens to help them identify harmful content, situation, or actors

Full List of Features or Tools Teens Would Be Open to Trying to Support Their Digital Wellbeing

1. Displaying warnings on splash screens with tips to improve digital wellbeing
2. Offering reminders or suggestions to take a break (e.g., stretch, drink water) after spending an extended period of time online
3. Reducing or preventing doomscrolling (e.g., ability to turn off infinite scrolling on social media)
4. Providing more in-app or in-device information on mental health resources and support
5. Apps limiting notifications at certain times of day (e.g., before bed)
6. Providing a data dashboard tool that shows wellbeing metrics across digital apps in one place (physical metrics, mental health metrics, etc.)
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13. Media literacy education to help me identify harmful content, situation, or actors

