



Magid

**COURAGEOUS
THINKING**

Online Safety & Parental Controls

Research Highlights » November 2020



Family
Online Safety
Institute

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What did we want to learn? »

1

What drives parents to use parental controls?

2

What parenting tools are available and what do parents and kids think about these tools?

3

What can media and tech companies do to better meet the needs of today's parents in providing solutions?

Key takeaways

What we learned – and what's important for media and tech companies to know

1

A ONE-STOP
DIGITAL SAFETY
RESOURCE IS AN
UNMET NEED
FOR
OVERWHELMED
PARENTS

2

MILLENNIALS ARE
DRIVING A
GENERATIONAL
DIGITAL
PARENTING SHIFT

3

SIMILARITY IN
ONLINE SAFETY
TOOLS POINTS TO
INNOVATION
OPPORTUNITIES

4

REACHING
PARENTS WHEN
KIDS ARE AGED
7-11 IS KEY

A journey towards trust.

Parents guide children through their digital lives, following a relatively well-defined path. Parental controls are key tools in that journey.

AGES
2-6

» Conversation,
limitations and rules

AGES
7-11

» Concerns, incidents (direct and indirect)

» As the digital parenting role shifts,
so does the role of tools and
solutions

AGES
12-17

» As trust builds, the balance of
responsibility shifts

» Having gone through this process
as kids creates a generational
parenting shift

Methodology »

1

Parental controls audit

Landscape review of parental control and online safety tools

2

Online communities

12 Parents of kids 2-16 years of age
9 Teens 12-16 years of age

3

Parent survey

N=1,200 parents of kids 2-17 years of age (in home) Parents 22-64 years of age
Census representative sampling in each state based on gender, age and ethnicity

ONE

Landscape Audit

“

“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

A wealth of parental control options, but a lot of similarity in features and function

- Similarities across platforms and devices indicate opportunities for differentiation and innovation
 - Content platforms (video, gaming, music) tend to offer ratings, filters and mature content notifications
 - Social media services tend to offer similar, standardized safety features and privacy settings
- Online safety center destinations have become an industry-standard best practice for leading media and tech companies
- Third party parental control apps and routers vary more wildly on price than on features



“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

TWO

Parental Involvement, Conversations & Rules

“

“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

Parents are involved in their kids' digital life, devices and content concerns, but can't cover everything

92% of parents have established at least some form of house rules

76% of parents give their initial tech safety talk high marks

11% of parents have never discussed any of the key topics

GENERATIONAL SHIFT » HOW DO CONVERSATIONS DIFFER ACROSS GENERATIONS?

Leading conversations for Millennial parents are around social interactions (known and unknown). Gen X parents tend to focus on what kids are watching while Boomer conversations are most frequently on the existential threat of online interactions with people unknown.



“I am absolutely an involved parent but also understand the importance of giving my child the ability to make choices and have them show responsibility in being able to make good choices. I'm an in the middle parent.” – Mom of teen 12-16

THREE

Concerns

“

“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

The intensity, range and evolving nature of issues overwhelms parents

20+ online threats were identified by parents as concerns with parents “very concerned” half of those threats

Areas of Greatest Concern

- **67%** -- external threats such as child predators, identity theft, bullies, hackers and scammers
- **64%** -- sexually suggestive content / pornography
- **61%** -- internal/kid-driven threats (breaking the rules, inappropriate behavior, bullying, social stress and making unauthorized purchases)

GENERATIONAL SHIFT » HOW DO CONCERNS DIFFER ACROSS GENERATIONS?

Comparing parents of similarly aged kids A7-11 and A12-17, Millennial parents' top concerns are internal threats. Millennial parents are more concerned about kid-driven/kid-focused concerns such as inappropriate behavior or making purchases without permission than Xer or Boomer parents.



“My concerns are that my children will be preyed upon or become victims of online predators. They live a fairly sheltered life and there are shows, apps and things out there that can change their thinking, beliefs and view of the world in a way that isn't healthy or appropriate.” – Mom of teen 12-16

FOUR

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 manufactures also have responsibility to put in place parental control settings.” – Dad of tween 7-11

Younger parents expect more support from the industry and their community

Older parents

- More likely they are to own this responsibility

Millennial parents

- Parents who grew up with mobile tech and social media expect more when it comes to protecting kids
- They see this as more of a shared responsibility
- Trend is likely to gain steam



“Parents don't really see what happens in the private chatrooms and in suggested content pages for the kids to look at. Also, who could be contacting them is unchecked. It's bad but I don't see it changing. It is my job to educate and protect them and teach them what is right and wrong for themselves.”

– Mom of teen 12-16

GENERATIONAL SHIFT »

WHERE DOES THE RESPONSIBILITY FOR KIDS' DIGITAL AND ONLINE SAFETY LIE?

“Most”
with parents

30%

MILLENNIAL
PARENTS
(A22-39)

43%

GEN X
PARENTS
(A40-55)

57%

BOOMER
PARENTS
(A56-64)

FIVE

Features: Online Safety & Parental Control

“

“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

Digital solutions for digital threats – how parents use online safety tools

79% of parents use or have used online safety tools

63% of parents consider adult/mature content blockers essential

27% of parents have used social media controls, despite parental concerns about external threats

Parents of kids aged 7-11 are most likely to use age-based content filters



“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

SIX

Safety Resources

“

“I just want to simplify my life with one place / shop to address all of my needs. It'll minimize my research and better use of my time.” – Dad of kid 2-6

A “one-stop shop” resource has universal appeal for parents

2/3 of parents of kids aged 7-11 are “very interested” in a one-stop shop

1/3 of parents are generally satisfied with the online safety tools they’ve used

“

“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

“They need to be child proof and effective. I want to make sure if these things are going to be in place and you're going to spend time doing it, that these things are going to in fact work with the purpose you have in mind.” - Dad of tween, 7-11

GENERATIONAL SHIFT » WHAT HAVE YOU USED TO LEARN ABOUT DIGITAL SAFETY TOOLS AND PARENTAL CONTROLS?

Boomers parents are more likely to rely on online-only sources and media sources (even when controlling for age of the children). Millennial parents do not have a dominant source; they are more likely to use social media, game platforms and music services to learn about digital safety and controls – spaces they grew up with and often use themselves.



THANK YOU

Molly Ludwig
SVP Digital Research & Strategy
mludwig@magid.com

Rich McGuire
VP, Quantitative Research
rmcguire@magid.com

Neil Mitchell
Director, Global Media & Entertainment
nmitchell@magid.com

Stephanie Arias
Research Associate
sarias@magid.com