



Family
Online Safety
Institute

2022 Research Report

Making Sense of Age Assurance: Enabling Safer Online Experiences

Conducted by

KANTAR

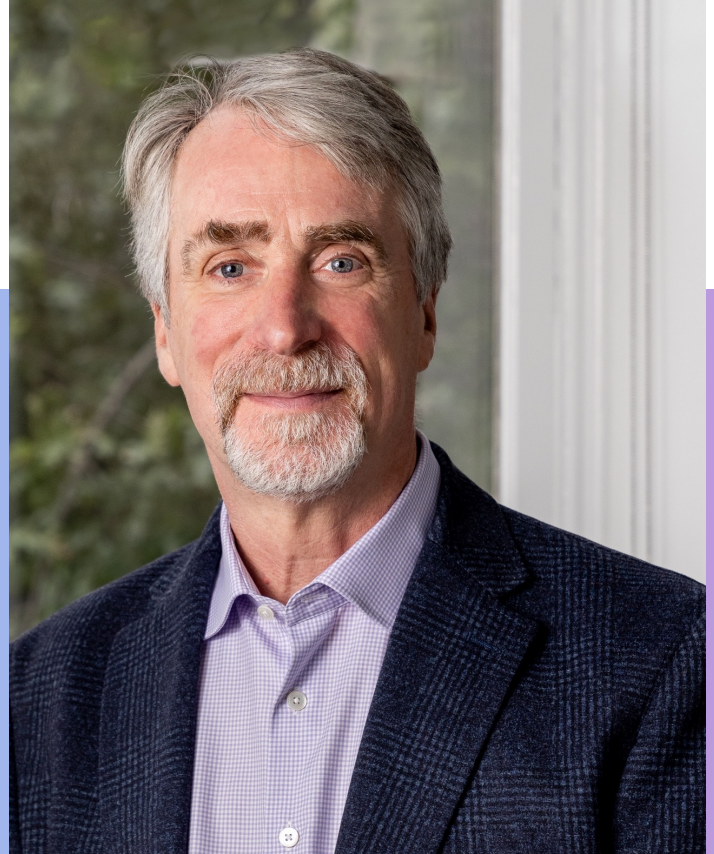
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Introduction

Age assurance online has challenged websites, platforms, and apps for over two decades. While it is agreed that keeping children in age-appropriate spaces is a fundamental part of their safety, determining age is difficult to do without a method that also requires personal data.



Numerous attempts to address this problem have returned to face a central question: How do we balance the effectiveness of a solution or technology with the invasiveness that it may bring? Or, more simply, how do we determine what is a reasonable tradeoff between safety and privacy?

This research looked at the awareness and attitudes of parents and children towards age assurance methods across the US, UK, and France. By surveying three countries, the goal was to compare and contrast the perspectives of parents and children based on cultural approaches to technology use and parenting style, attitudes toward safety and privacy, and more specifically their perceptions of current practices and future possibilities for age assurance.

For solutions to be well-received, parents and children must be educated to understand their purpose and benefit. Technology companies and third-party providers have worked to advance technologies from age gating to age estimation, but they must also be able to transparently communicate these methods to users in a way that will build trust. We must also involve children themselves in the processes and policies that will directly impact their safety and online experiences.

Lastly, governments will have to do a better job at harmonizing their regulations. We currently have a patchwork of laws at state, federal, and international levels that makes the implementation of age assurance more difficult than it already is. It is our hope that this report will help to inform the debate in a way that will lead to more balanced and enlightened legislation.

So please use the findings to inform your own work, whether it be in industry, government, the nonprofit sector, academia, or research. Getting age assurance right will take the ingenuity and abilities of all sectors of society. It remains a missing and vital link to making the online world safer for kids and their families.

Stephen Balkam, CEO
Family Online Safety Institute
November 2022

About This Study



This study was conducted by Kantar on behalf of the Family Online Safety Institute. It explores the awareness, attitudes, and behaviors of both parents and children regarding age assurance – a process that encompasses the methods and solutions used to verify or estimate a user's age on online services and apps.

The goal of the study was to assess the understanding of age assurance among both parents and children, including the perceived effectiveness of current methods. A brief exploration of receptivity to future solutions is also included.

The study explores related topics such as views of broader online safety, parental monitoring behaviors, and attitudes about who is responsible for keeping children safe online.

Research was conducted in the United States, United Kingdom, and France. This cross-market approach points to interesting similarities and differences in how parents view technology and approach managing their children's online activity.

Methodological Overview

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



Phase I: Qualitative Journal

A qualitative, 3-day online journal was conducted July 12 – July 29, 2022. Seventy-one parents and children participated across the US, UK, and France. The qualitative work informed the design of an online survey of parents and children aged 9-12 and 13-17 in the US and UK as well as children aged 10-14 and 15-17 in France.

United States	United Kingdom	France
n= 12 Parents	n= 13 Parents	n= 12 Parents
n= 11 Children	n= 12 Children	n= 11 Children



Phase II: Quantitative Survey

An online quantitative study conducted August 26 - September 19, 2022, across the US, UK, and France.

Both parents and their children participated in the same survey, where the parent completed the first half and their child the second.

1000 surveys (combined parent and child responses) were completed in each of the three countries: the US, UK, and France, for a total sample of 3,000 parents and children.

The quantitative survey was fielded among parents and children aged 13-17 years old.

See Appendix 1 for full methodological details.

Key Findings

1 Parents are highly engaged with their children's digital lives and are invested in facilitating a safe, positive online experience.

Parents put a great deal of time and effort into managing children's online activities and ensuring responsible technology use.

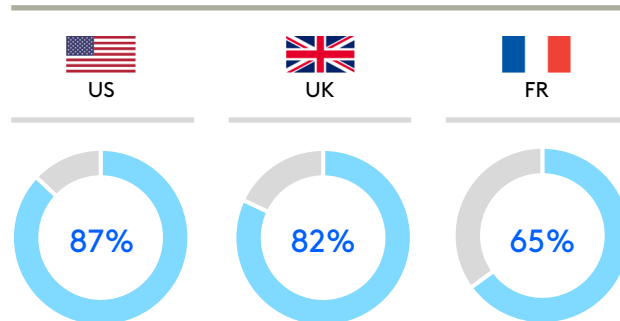
Parents in the US tend to take the most hands-on approach, with **87%** reporting that they use or have used tech tools such as parental controls, monitoring apps, or other software to oversee their children's digital lives.

2 Children, like parents, want safe and positive online experiences, and children understand that parents monitor online activity with good intentions.

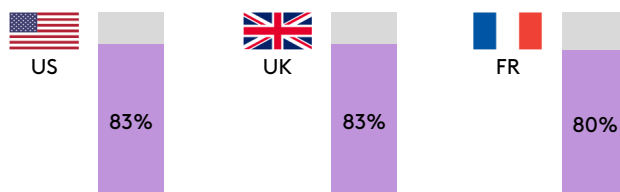
Parents' efforts to safeguard online experiences are felt by children. Some **97%** of children in the US and UK, and **90%** of children in France, feel safe online and acknowledge parental monitoring methods are in place for their protection.



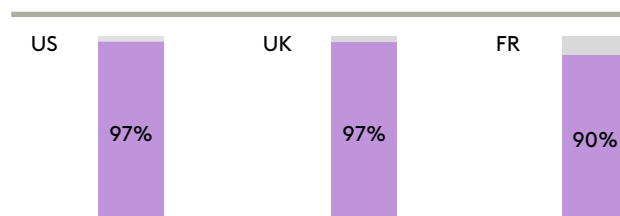
% of parents that use or have used tech tools to monitor their children's online usage



% of children agree my parents monitor my online activity to protect me from harm



% of children feel safe online



Key Findings

3 Parents see themselves as having the most responsibility for managing their children's access to age-appropriate content, more so than technology companies or the government.

This sense of responsibility is coupled with concern on the part of parents that they are not equipped to succeed. They feel daunted by the task of understanding safety measures and enforcing responsible technology use, while at the same time respecting children's privacy as they get older.

4 Even as parents feel this strong sense of responsibility, they also want more involvement from relevant partners to help safeguard their children.

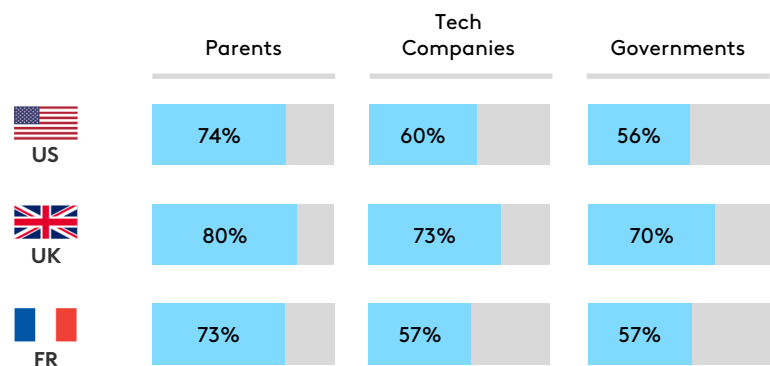
Nearly **7 in 10** parents in the US, and roughly **6 in 10** parents in the UK and France, believe that technology companies and governments should be more involved in protecting children online.

5 Children also desire an active role in the processes that will shape their digital lives, even if they are not always comfortable discussing their online activities with parents.

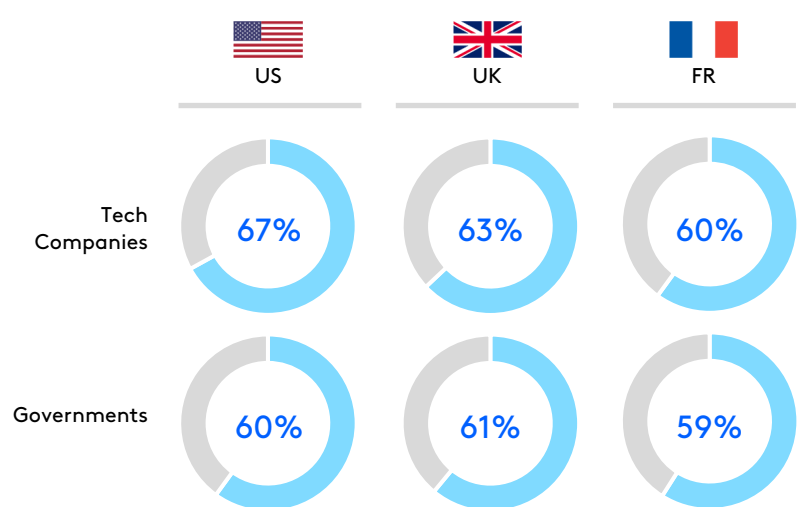
A majority of children in the US (**65%**), the UK (**57%**), and France (**52%**), report wishing that parents would consider their opinions more when determining the rules and parameters for their technology use.



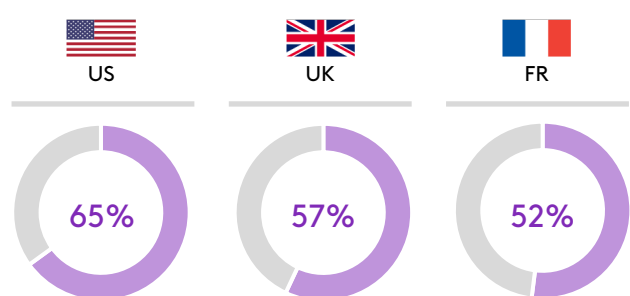
% of parents that agree industry and governments hold high responsibility for managing age-appropriate content



% of parents that believe industry and governments should be more involved in protecting children online



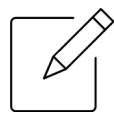
% of children agree "I wish my parents took my opinion into account more on what/how they manage technology use"



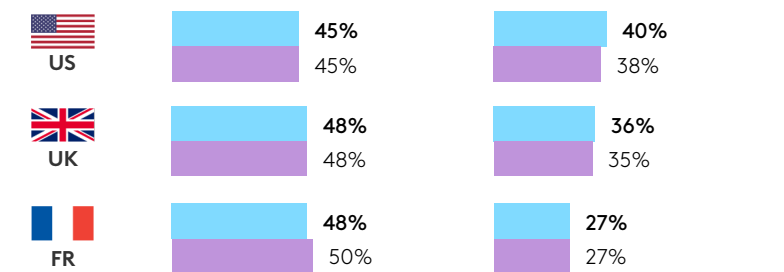
Key Findings

6 Age assurance is seen by parents and children as being more about restricting access to content, rather than ensuring safe and beneficial online experiences.

This is most pronounced in the UK and France. In France, roughly **50%** of parents and children associate age assurance with restricting content, compared to **27%** who interpret it more positively with creating a safer online environment.

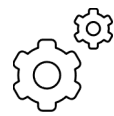


Based on your understanding, age assurance is:

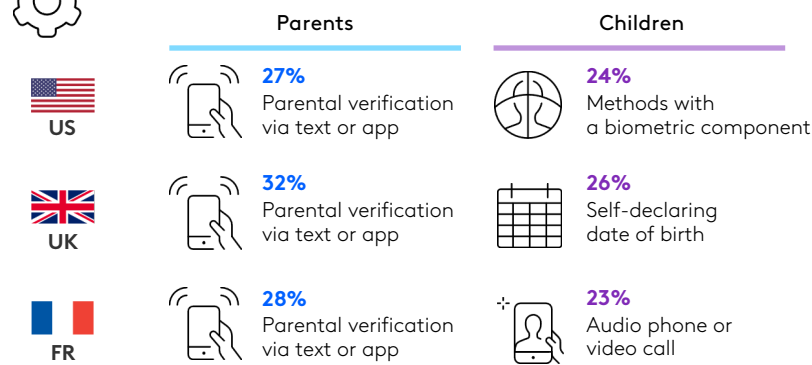


7 There is no clear ‘winner’ or standout approach when respondents are asked about their preference for current age assurance methods.

Neither parents nor children are able to agree on a singular age assurance method that addresses all of their concerns. No method is preferred by more than **32%** of respondents.



Preferred Methods of Age Assurance



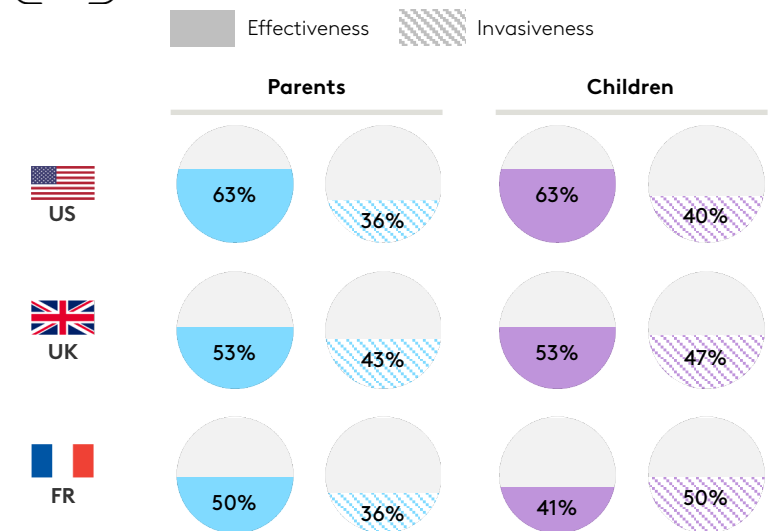
8 This ambivalence appears to come down to a question of balancing invasiveness vs. effectiveness.

Verifying a child’s age with their ID is considered the most effective method, but also the most invasive.

Parental verification via text or app, such as a push notification, seems to strike a happy medium.



Effectiveness and Invasiveness of Verifying Age with a Child’s ID



Key Findings

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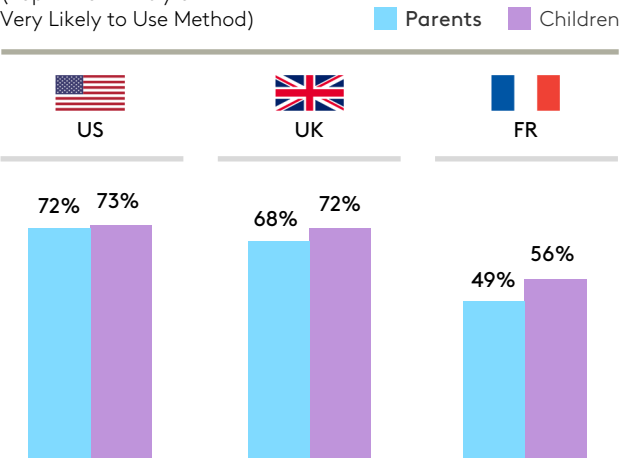
The applied use of biometrics appears to be a promising method of age assurance, as parents and children view it as effectively assessing age.

Over two-thirds of parents and children in the US and UK and roughly half in France indicate that they are open to age assurance methods that include a biometric component, and nearly two-thirds of parents across all three countries feel that biometrics are an effective tool for assessing age.



Likelihood of Using Biometric Methods for Age Assurance

(Top-2-Box: Likely or Very Likely to Use Method)



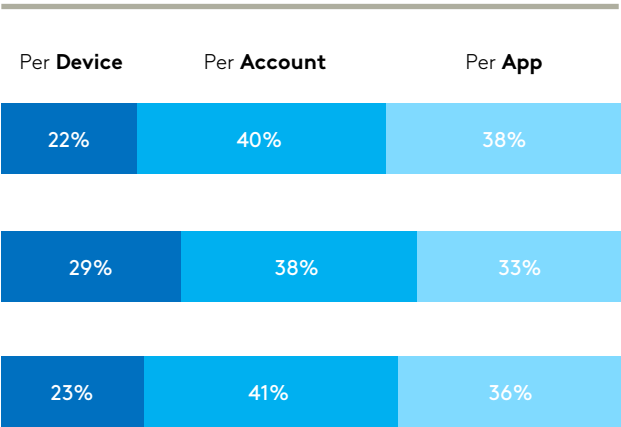
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Parents seek age assurance solutions that are effective yet convenient, and they gravitate toward settings that achieve both.

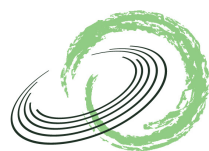
If offered, parents report that their most ideal method for setting age assurance on apps and services would be on a per account basis - the point at which they are downloaded from an app store.



Ideal Age Assurance Settings for Apps and Services



These insights and the findings that follow in this report point to tangible opportunities for industry and governments to meet the complex challenge of age assurance and improve how methods are developed, implemented, and perceived by users.



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