



Promoting Wellbeing in a Digital World

2024 EXECUTIVE
SUMMARY

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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

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December 2024



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.

Teens place greater emphasis on social health than parents, and teens also think as often about their social health as they do their mental health.

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 think about social and mental health equally and frequently. In the U.S., 59% of teens report thinking about both their social and mental health “always” or “often” in their daily life. In Brazil, this rises to 68% for social and 72% for mental health, while in Germany, 44% of teens think about their social and 41% about mental health regularly. This emphasizes the need to support both social and mental wellbeing, especially in the digital age.

Teens prioritize digital wellbeing more than parents, who view it as the least influential factor.

Although digital wellbeing isn’t considered a primary component of wellbeing by respondents, both parents and teens acknowledge the significant impact digital activity has on different facets of wellbeing.

Over half of parents in the U.S. and Brazil believe that their online habits impact their physical, mental, emotional, and social health. This highlights the complex relationship between digital and overall wellbeing.

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

Total Parents



Total Teens





Parents and teens also worry about the wellbeing risks of digital technology, with sleep quality topping their concerns.

Parents and teens across all three countries say the most negative impact of digital technology is its effect on sleep. Nearly half of Brazilian parents (48%) and U.S. parents (44%) and over one-third of German parents (38%) report that digital tech negatively impacts teens' sleep quality.

When it comes to concerns about online activity, both parents and teens share their greatest worry: getting scammed or exposed to fraud (28% of parents and 28% of teens across the U.S., Brazil, and Germany).

The positive effects on creativity and self-expression are also recognized.

While acknowledging negative impacts, parents and teens also value the way digital technology and devices support knowledge, creativity, self-expression, and friendships.

This suggests that parents and teens recognize the dual nature of technology, acknowledging both the risks and rewards of digital life on teen wellbeing and underscoring the importance of managing online safety while leveraging the positive aspects of digital life.

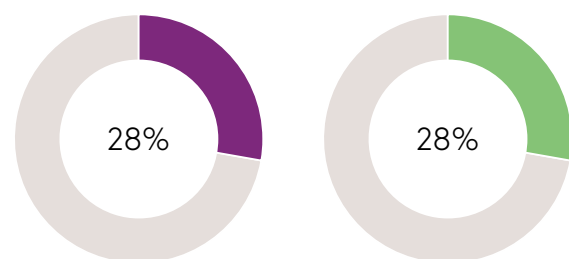
2 Parents and teens alike worry about wellbeing risks, such as sleep disruption. Yet, they also appreciate the benefits of being online, such as social connection and creativity.

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 on social connections. Connecting with peers is the top benefit of teens' online activity, with 41% of all parents and 44% of all teens highlighting it as the most significant positive effect.

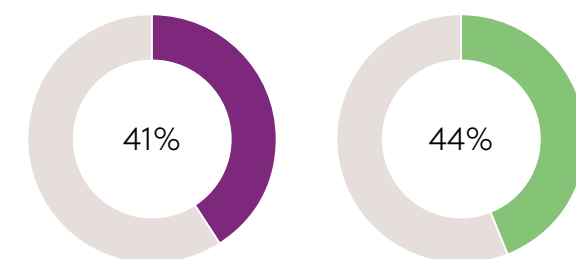
Top Concern from Being Online to Teens' Wellbeing (#1 Concern, Ranked by Percentage Across the U.S., Brazil, and Germany)

Risk of getting scammed or exposure to fraud

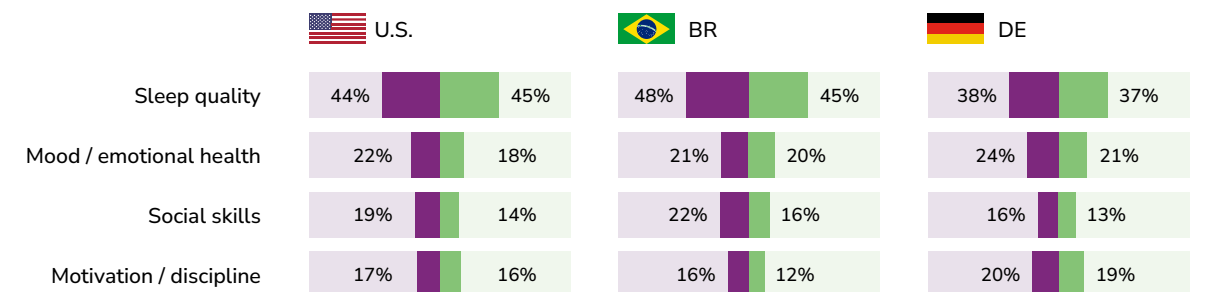


Top Benefit from Being Online to Teens' Wellbeing (#1 Benefit, Ranked by Percentage Across the U.S., Brazil, and Germany)

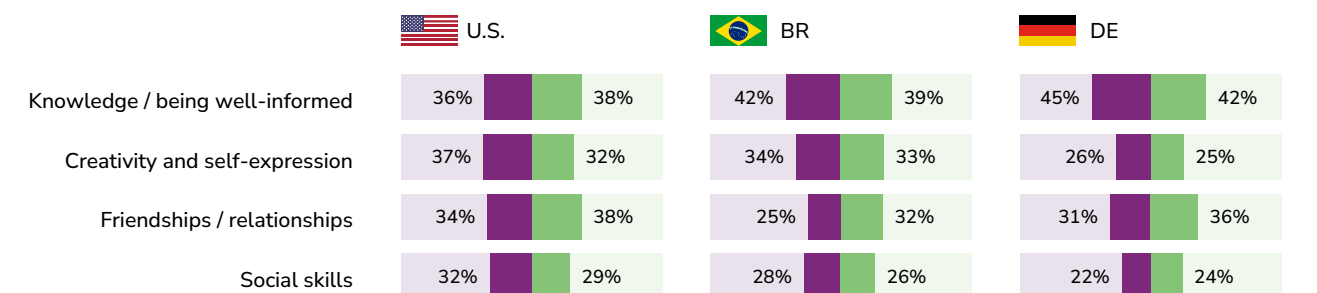
Connecting with peers



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.

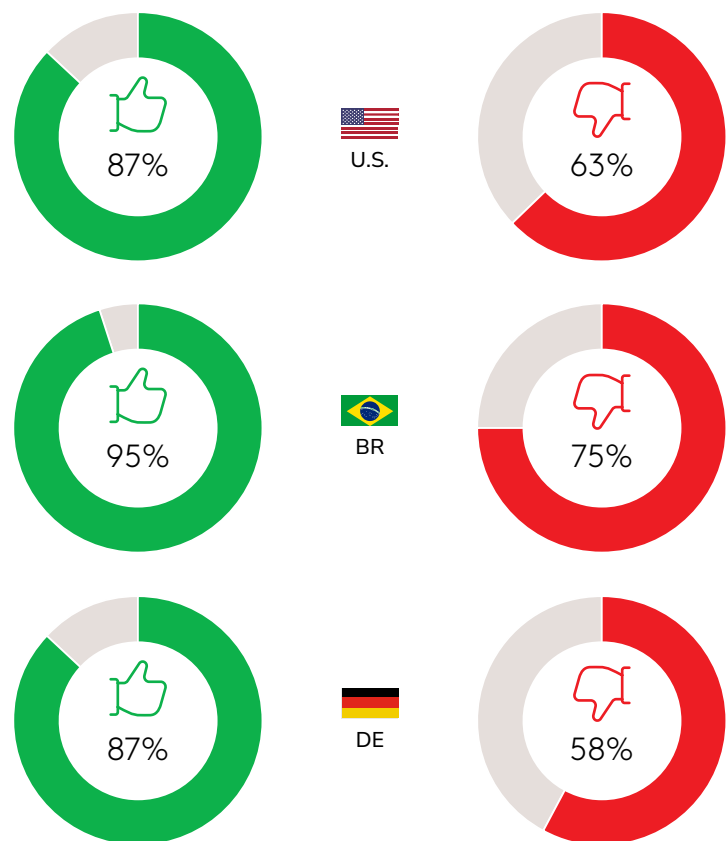
Nearly all teens (roughly 9 in 10) across the three countries studied indicate that their online activity has “always” or “often” led to a positive effect on aspects of their mental / emotional and social wellbeing.

Teens across the U.S. (58%), Brazil (73%), and Germany (53%) say their digital activity has “always” or “often” led to feeling more connected to loved ones. These figures are markedly higher than the negative experiences teens believe happen as often, such as feeling the need to check their notifications (38% in the U.S., 49% in Brazil, and 32% in Germany).

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 come to their wellbeing. However, teens feel more accountable for managing their own wellbeing than parents admit.

Both parents and teens believe they are primarily responsible for promoting teen wellbeing, including digital wellbeing.

Approximately three-quarters of parents and teens across the U.S., Brazil, and Germany agree that parents play a critical role in safeguarding their teens’ physical, mental, and emotional health.

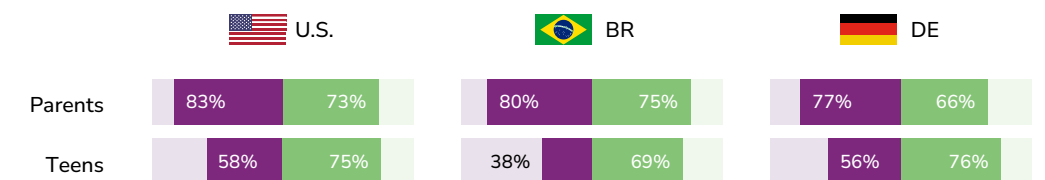
Parents agree that teens are key contributors to their own digital wellbeing, but teens take even stronger ownership of this responsibility.

While parents believe they are primarily responsible for teens’ digital wellbeing, teens themselves feel a stronger sense of personal responsibility. 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.

Legend: Parents (Purple), Teens (Green)

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

Digital Wellbeing





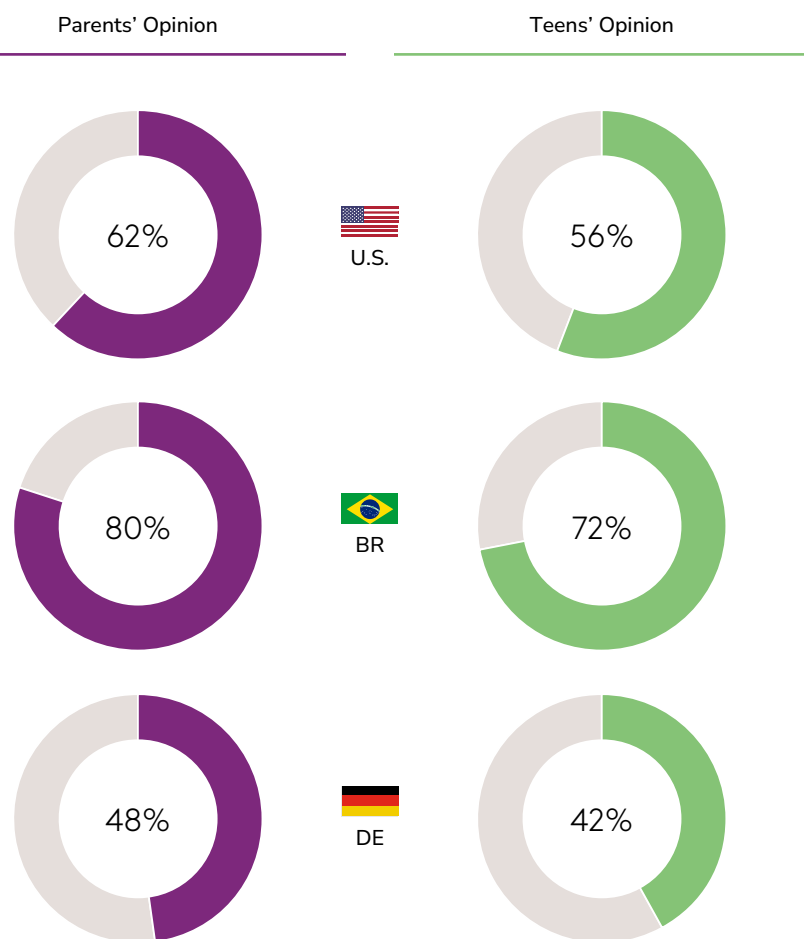
5 Parents and teens frequently discuss digital wellbeing, fostering a collaborative and empowering approach to teens' managing their online habits.

Across countries, families have frequent conversations about the impact of digital life on wellbeing.

In the U.S., 62% of parents report weekly or daily discussions, while this figure rises to 80% in Brazil. German parents, although less frequent, still discuss this topic with their teens, with 48% holding these conversations at least weekly.



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

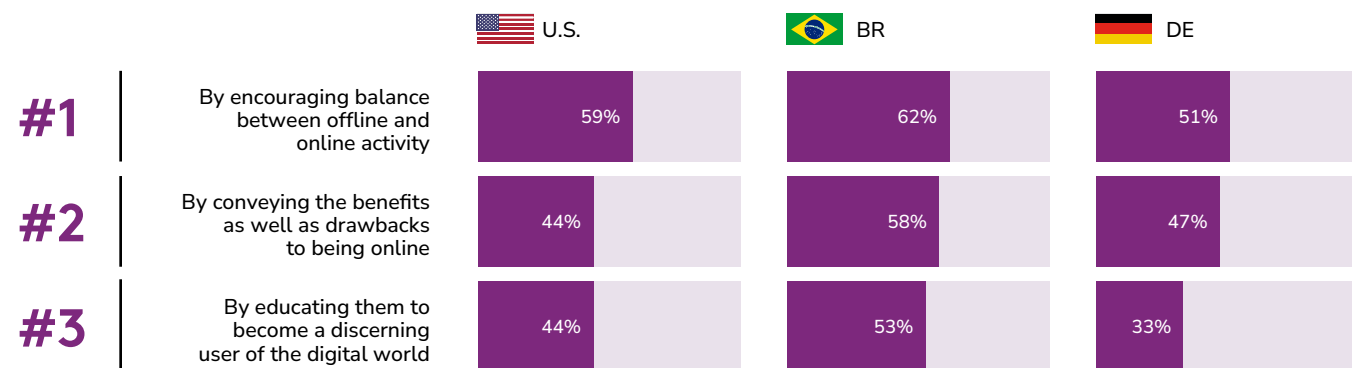


Together with frequent parent-teen discussions about digital wellbeing, these efforts highlight a collaborative approach to equipping teens with the tools they need to promote wellbeing in a digital world.

Parents aim to empower rather than control teens, focusing on education to help teens manage their own digital wellbeing.

The most common approach parents use to discuss digital wellbeing with their teens is encouraging a balance between online and offline activities: 59% in the U.S., 62% in Brazil, and 51% in Germany. Additionally, parents in Brazil (53%) and the U.S. (44%) aim to teach their teens how to critically evaluate their online activities, fostering independence and self-awareness.

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





6 Both parents and teens are receptive to additional support in managing teen digital wellbeing, favoring tech companies over government intervention.

While family support is crucial, teens have mixed feelings about the role of tech companies and governments in supporting digital wellbeing.

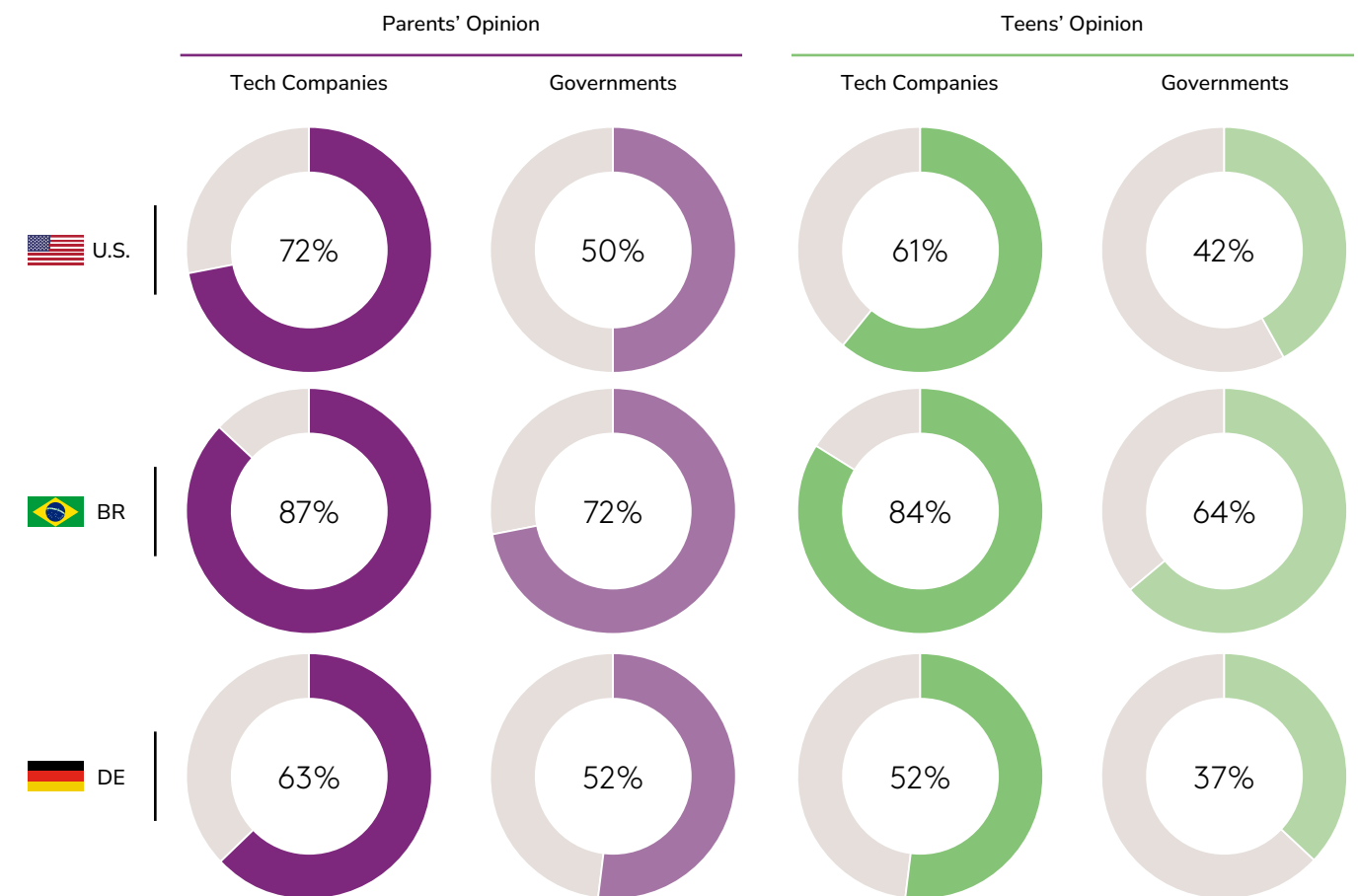
In Brazil, 40% of parents and 46% of teens feel supported by tech companies, but this drops in the U.S. (32% of parents and 34% of teens) and Germany (21% of parents and 24% of teens). Perceptions of government support are even lower, with fewer than 30% of parents and teens in the U.S. and Brazil and only 15% of German parents and 16% of teens feeling supported by bureaucratic institutions.

Despite these perceptions, Brazilian parents (72%) and teens (64%) are open to government intervention. U.S. and German parents and teens are more hesitant, with teens expressing stronger resistance.

Tech companies can play a key role in improving teen digital wellbeing.

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. This is particularly pronounced in Brazil, where 87% of parents and 84% of teens favor increased involvement from tech companies. U.S. and German parents (72% and 63%, respectively) also express considerable support.

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.

These findings reveal an opportunity for tech companies to develop solutions or features that go beyond simply protecting teens online, instead helping to better nurture their 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 (77% in the U.S., 90% in Brazil, and 73% in Germany) and content aimed at improving mood (77% in the U.S., 90% in Brazil, and 68% in Germany).

While parents and teens generally share similar interests in trying new tools, teens are even more open to trying certain solutions focused on social and digital wellbeing.

Teens' 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, where in Brazil, 82% of teens show particular interest in apps designed to educate about digital wellbeing. This 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

