FOSI
Family Online Safety Institute

Promoting Wellbeing in a Digital World

2024 RESEARCH REPORT LAUNCH

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#fosi2024

Welcome from Kantar!

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Goals for Today

Orient you to the 2024 FOSI research study

Share the story of what we learned

Set the stage for the panel discussion

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Research Objectives

- Understand how parents and their teens **navigate the opportunities and challenges** at the intersection of digital life and wellbeing

- Uncover how parents and their teens perceive **wellbeing in a digital world** and their **attitudes toward digital wellbeing**

- Inform ways to **promote teens' wellbeing online**

Approach

Qualitative

- 24 parents and 24 teens participated in focus groups in the U.S., BR, and DE

- Four focus groups were conducted in each country (two groups with four parents each and two groups with four teens each)

Quantitative

- ~20-minute online quantitative survey, in the US, BR, and DE

- n=1,000 (combined parent and teen responses) per country

- Fielded among parents and their teens aged 13-17 years old

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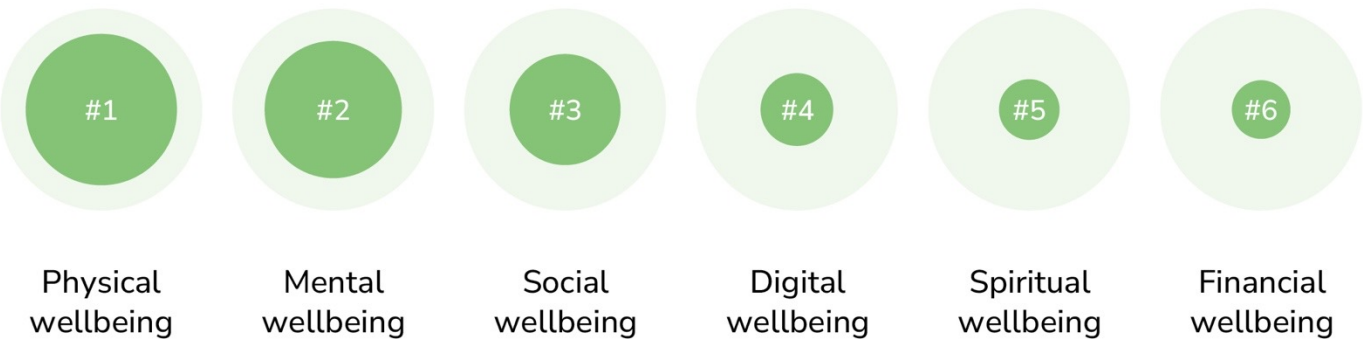## The Impact of Digital Life on Wellbeing

Parents and teens have different opinions on what shapes their wellbeing

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

Total Parents

#1	#2	#3	#4	#5	#6
Physical wellbeing	Mental wellbeing	Financial wellbeing	Social wellbeing	Spiritual wellbeing	Digital wellbeing

Total Teens

#1	#2	#3	#4	#5	#6
Physical wellbeing	Mental wellbeing	Social wellbeing	Digital wellbeing	Spiritual wellbeing	Financial wellbeing

Risk of scams are apparent, but the benefits of social connection are most appreciated

Total Parents Total Teens

Total Parents Total Teens

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

28%

28%

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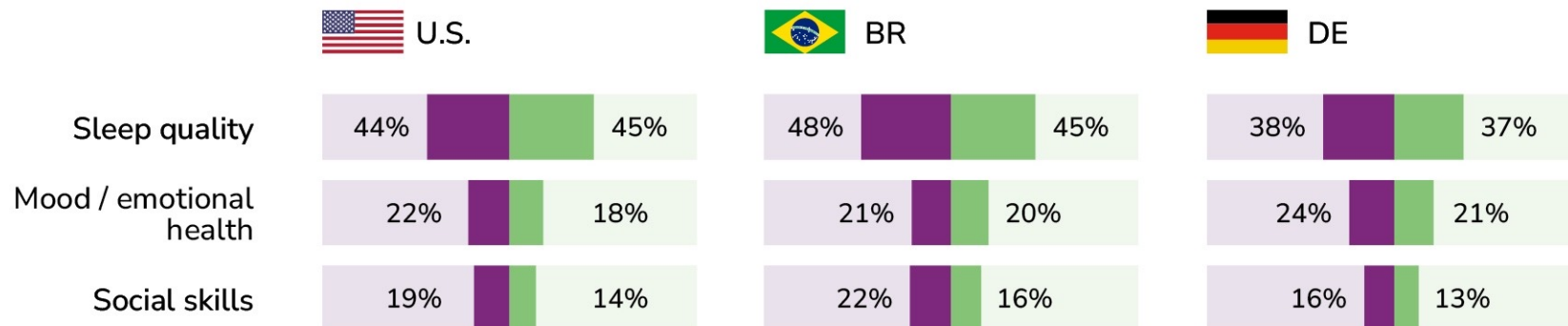
Connecting with peers

41%

44%

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

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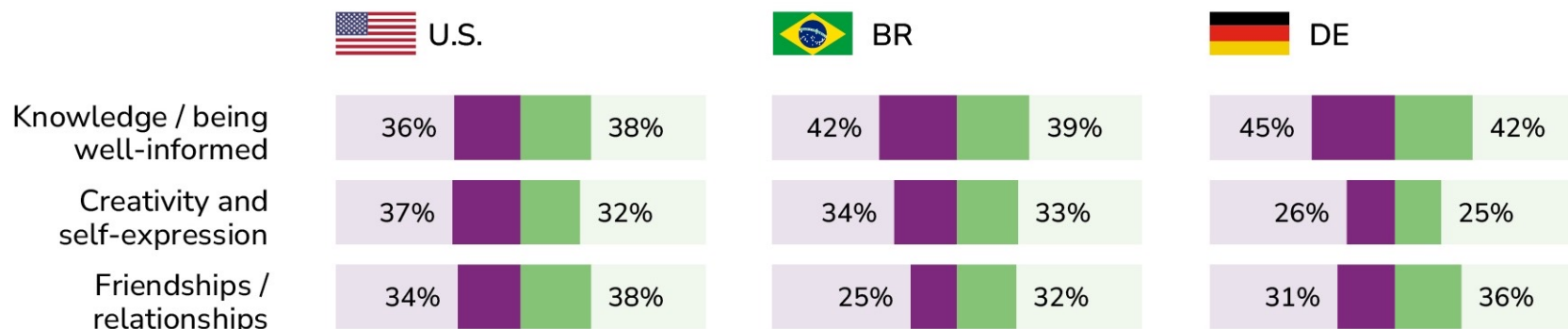-Teen, Brazil

Sleep quality is parents' and teens' top concern

Parents **Teens**

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

	U.S.	BR	DE
	Parents / Teens	Parents / Teens	Parents / Teens
Sleep quality	44% / 45%	48% / 45%	38% / 37%
Mood / emotional health	22% / 18%	21% / 20%	24% / 21%
Social skills	19% / 14%	22% / 16%	16% / 13%

Parents **Teens**

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

	U.S.	BR	DE
	Parents / Teens	Parents / Teens	Parents / Teens
Knowledge / being well-informed	36% / 38%	42% / 39%	45% / 42%
Creativity and self-expression	37% / 32%	34% / 33%	26% / 25%
Friendships / relationships	34% / 38%	25% / 32%	31% / 36%

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Positive online experiences outweigh negative ones

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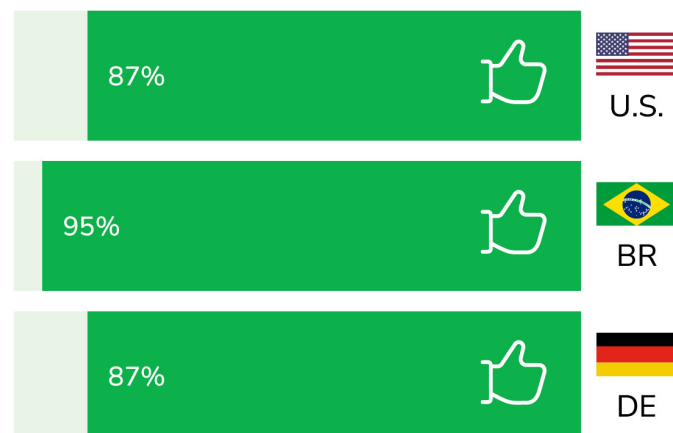
Experienced At Least One Negative Situation as a Direct Result of Spending Time Online

	U.S.	
87%		63%
95%	BR	75%
87%	DE	58%
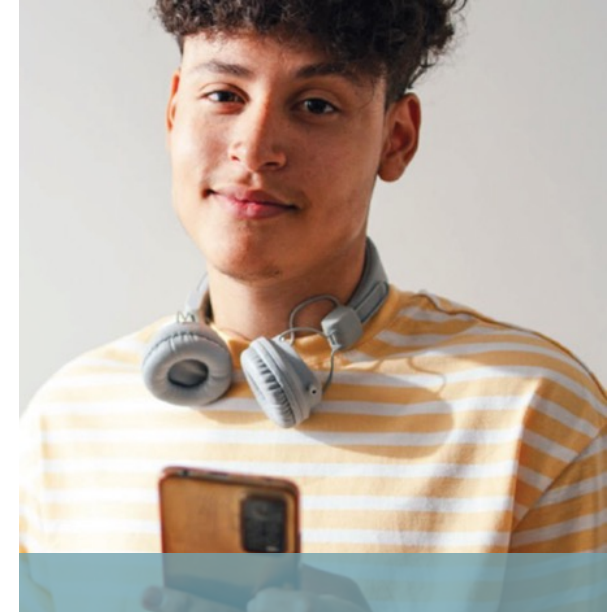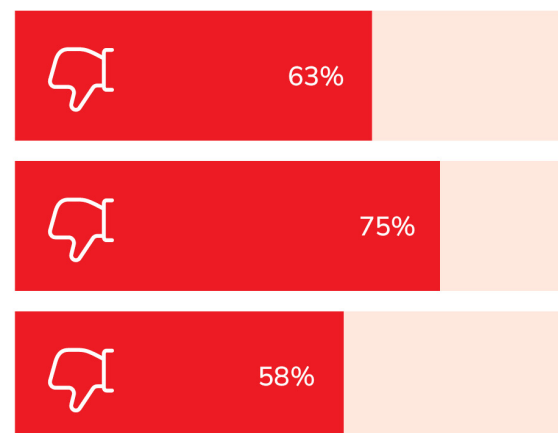
*"All of these things [such as my mood, energy, sleep quality, etc.] can be **positively and negatively impacted**. It just depends on how you use it."*
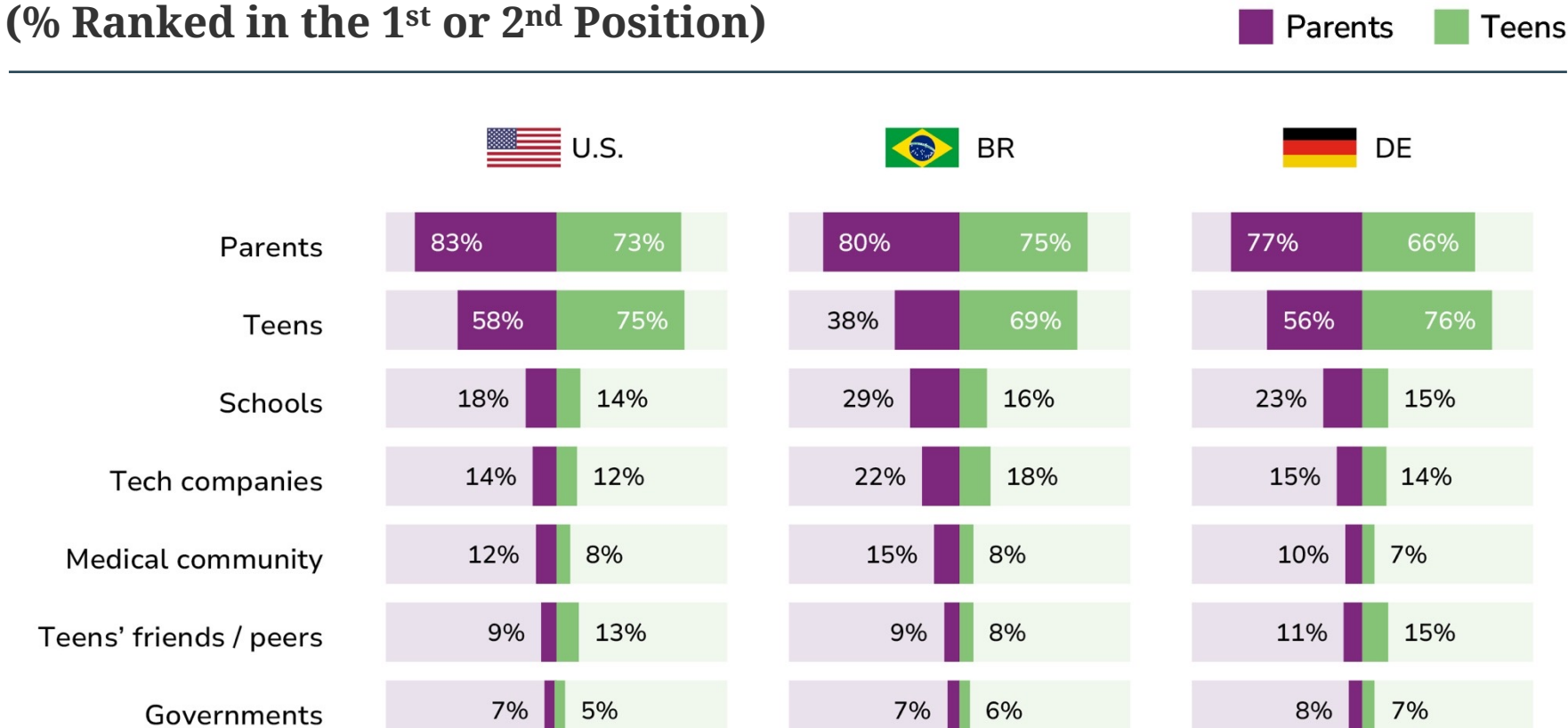*- Teen, Germany*

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Empowering Teen Wellbeing

Teens feel a strong sense of personal responsibility for managing their digital wellbeing

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

Legend: ■ Parents ■ Teens

	U.S. Parents	U.S. Teens	BR Parents	BR Teens	DE Parents	DE Teens
Parents	83%	73%	80%	75%	77%	66%
Teens	58%	75%	38%	69%	56%	76%
Schools	18%	14%	29%	16%	23%	15%
Tech companies	14%	12%	22%	18%	15%	14%
Medical community	12%	8%	15%	8%	10%	7%
Teens' friends / peers	9%	13%	9%	8%	11%	15%
Governments	7%	5%	7%	6%	8%	7%

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

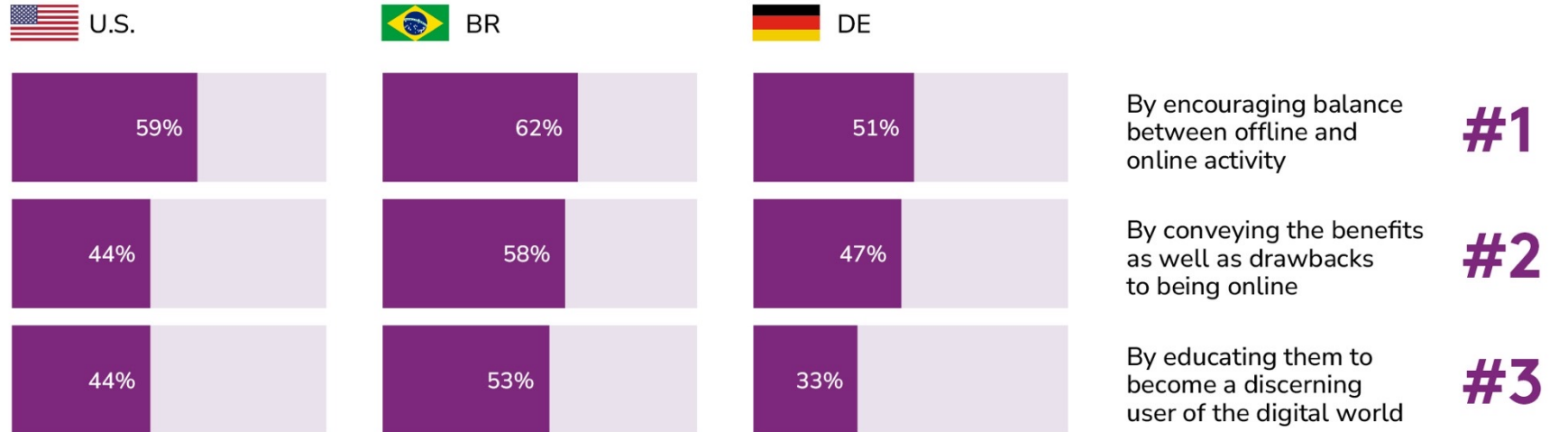KANTAR | FOSI Family Online Safety Institute

Families routinely discuss digital wellbeing

Parents' Opinion | **Teens' Opinion**

Frequency of Parent-Teen Discussions on How Digital Life Impacts Teen's Wellbeing (Daily or Weekly)

Country	Parents' Opinion	Teens' Opinion
U.S.	62%	56%
BR	80%	72%
DE	48%	42%
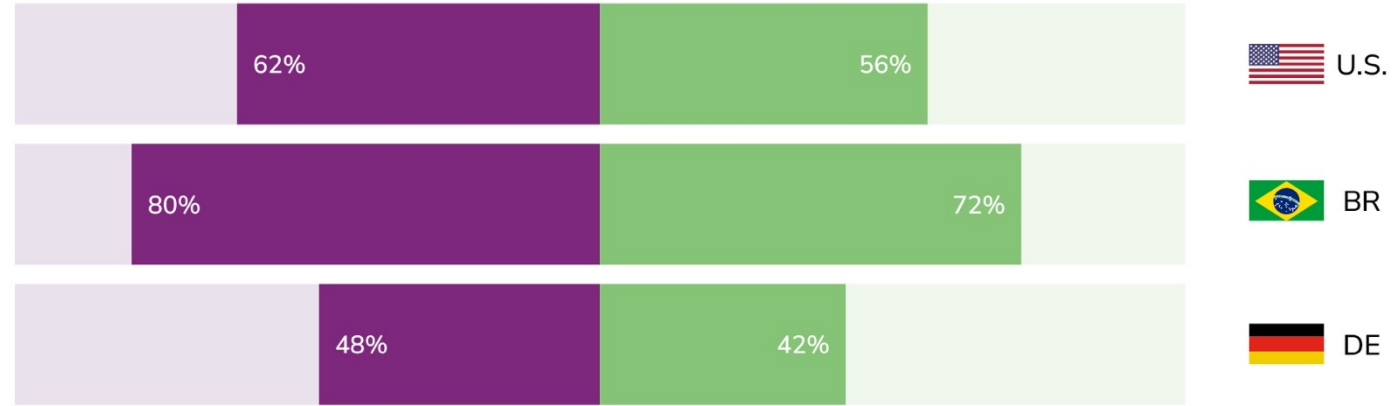
Top Three Ways Parents Aim to Empower Teens to Manage Their Digital Wellbeing (Select All That Apply)

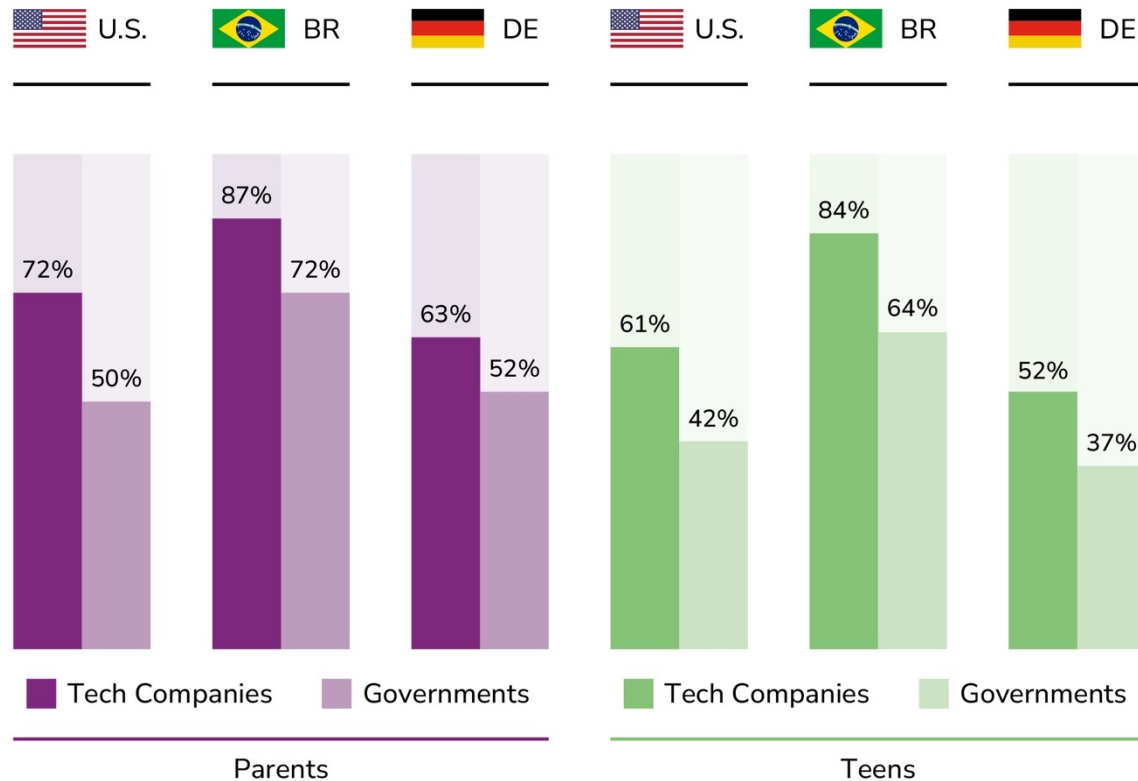|	U.S.	BR	DE	
By encouraging balance between offline and online activity	59%	62%	51%	#1
By conveying the benefits as well as drawbacks to being online	44%	58%	47%	#2
By educating them to become a discerning user of the digital world	44%	53%	33%	#3

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Looking to the Future

Families are receptive to additional support for teen digital wellbeing

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

🇺🇸 U.S.   🇧🇷 BR   🇩🇪 DE   🇺🇸 U.S.   🇧🇷 BR   🇩🇪 DE

Parents
- U.S.: Tech Companies 72%, Governments 50%
- BR: Tech Companies 87%, Governments 72%
- DE: Tech Companies 63%, Governments 52%

Teens
- U.S.: Tech Companies 61%, Governments 42%
- BR: Tech Companies 84%, Governments 64%
- DE: Tech Companies 52%, Governments 37%

Legend: ■ Tech Companies ■ Governments

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

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Parents express strong interest in online safety solutions

Parents' 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
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

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Teens look to try social tools and educational resources about digital wellbeing

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

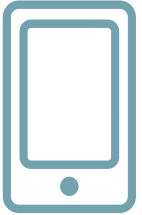| U.S.	BR	DE
73% Default privacy settings to protect personal information	**84%** Default privacy settings to protect personal information	**62%** Media literacy education to identify harmful content
65% Suggesting content that will positively impact mood / behavior	**83%** Suggesting content that will 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

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Implications & Actions

Guidance for parents, suggestions for industry, & considerations for policymakers

Broaden and deepen wellbeing conversations	Empower teens toward the positives
Connect digital to wellbeing	Champion digital wellbeing & simplify solutions
Think beyond bans	Continue to fund research