

Closing the Protection Gap:

From Insight to Intervention in Preventing Online Child Sexual Exploitation

Market Research Report

August 2026



BACKGROUND

Children are spending more time online across social media, gaming, messaging, streaming, and connected devices than ever before.

While digital platforms create opportunities for learning, creativity, and connection, they also expose children to growing online safety risks. These include inappropriate content, cyberbullying, scams, grooming, exploitative interactions, and child sexual abuse material (CSAM).

As online behaviors continue to evolve, parents, educators, technology companies, policymakers, and child-protection organizations are increasingly focused on understanding how to better protect children while balancing privacy, independence, and healthy digital experiences.

CORE RESEARCH OBJECTIVES



Explore how online safety ecosystems can better respond to the realities of children's digital behaviors and experiences



Identify disconnects, unmet needs, and barriers in parent and caregiver understanding, preparedness, and management of online risks



Generate insights to support the development of more effective education, communication, safety tools, and intervention approaches for families

METHODOLOGY



Market
US



Fieldwork
May 2026



Online survey with
n= 1014

- **innovateMR** used as panel provider for this research
- [Amplifyer AI](#) used to generate communication platforms to action the research findings

Sample Criteria

- Must have legal guardianship of children ages 6-17 years of age
- Must live with these children at least part time
- Must make decisions about what their child is allowed / not allowed to do online
- Representative demographics of US parents with children in this age group

ANALYTIC METHODS

- Generative AI-powered adaptive probing for deeper insights within the survey
- NLP-assisted verbatim analysis for open-ended responses
- Multi-agent AI strategic intelligence and insight synthesis platform
- Latent class segmentation modeling combined with segment-level preference analysis
- MaxDiff prioritization modeling with cluster analysis
- Driver analysis using Johnson's Relative Weights
- Gap and opportunity analysis to identify unmet needs, disconnects, and areas for intervention and support
- Allocation-based prioritization modeling using constant-sum exercise to quantify relative importance and decision trade-offs across online safety factors

In this report, data is sometimes shown by key groups, defined as below

Tech Experience



Experienced

- Regularly manage devices, apps, and settings on my own
- Set up, customize, and troubleshoot technology for myself and others

Inexperienced

- Rely on others to set up or manage technology for me
- Can use devices and apps, but rarely change settings
- Can adjust basic settings

Online Risk Perceptions



High

- Very high risk
- High risk

Moderate

- Moderate risk

Low

- Low risk
- Very low risk

Focus on Online Safety



Minimal

- Have not given much thought to online safety for children
- Somewhat aware of online risks, but do not take specific actions to manage them

Basic

- Pay attention to online safety and have some basic rules or controls in place

Active

- Very focused on online safety and actively monitor or manage my children's online activity
- Extremely proactive about online safety and take extensive steps to protect them online

Ages of Children in the Household



Younger Children Only

- Households with children 12 and under only

Both

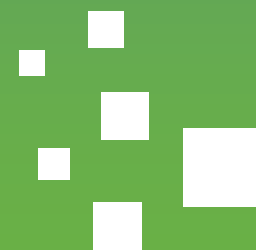
- Households with children in both the younger and older age groups

Older Children Only

- Household with children 13 years or older only



TECHNOLOGY AND ONLINE BEHAVIOR LANDSCAPE



SUMMARY:

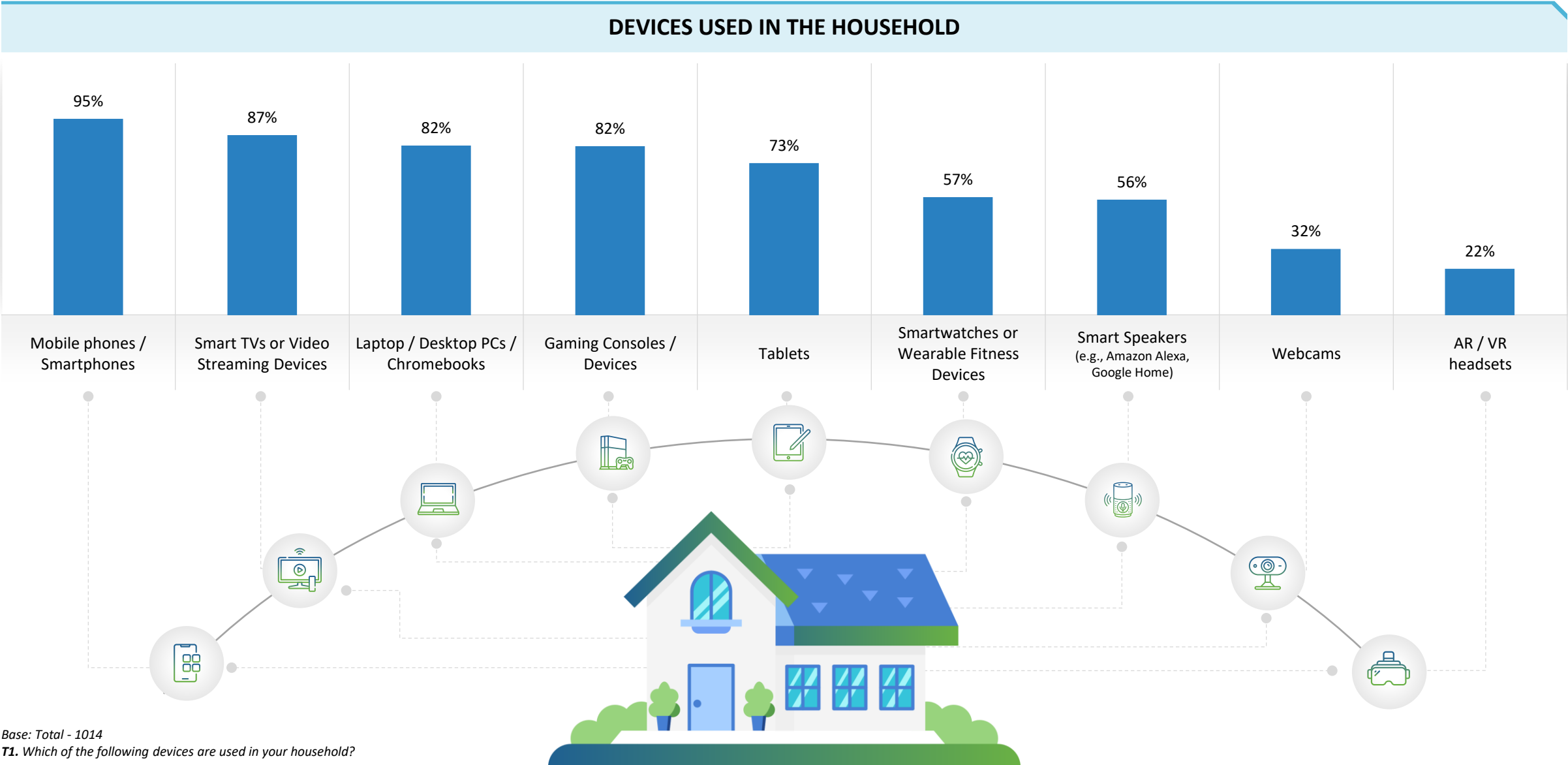
TECHNOLOGY AND ONLINE BEHAVIOR LANDSCAPE

Children's digital environment is broad, multi-device and expands with age. Smartphones, gaming devices, streaming devices and tablets are already commonplace; as children get older, smartphones, laptops and the broader connected-device ecosystem become increasingly prominent.

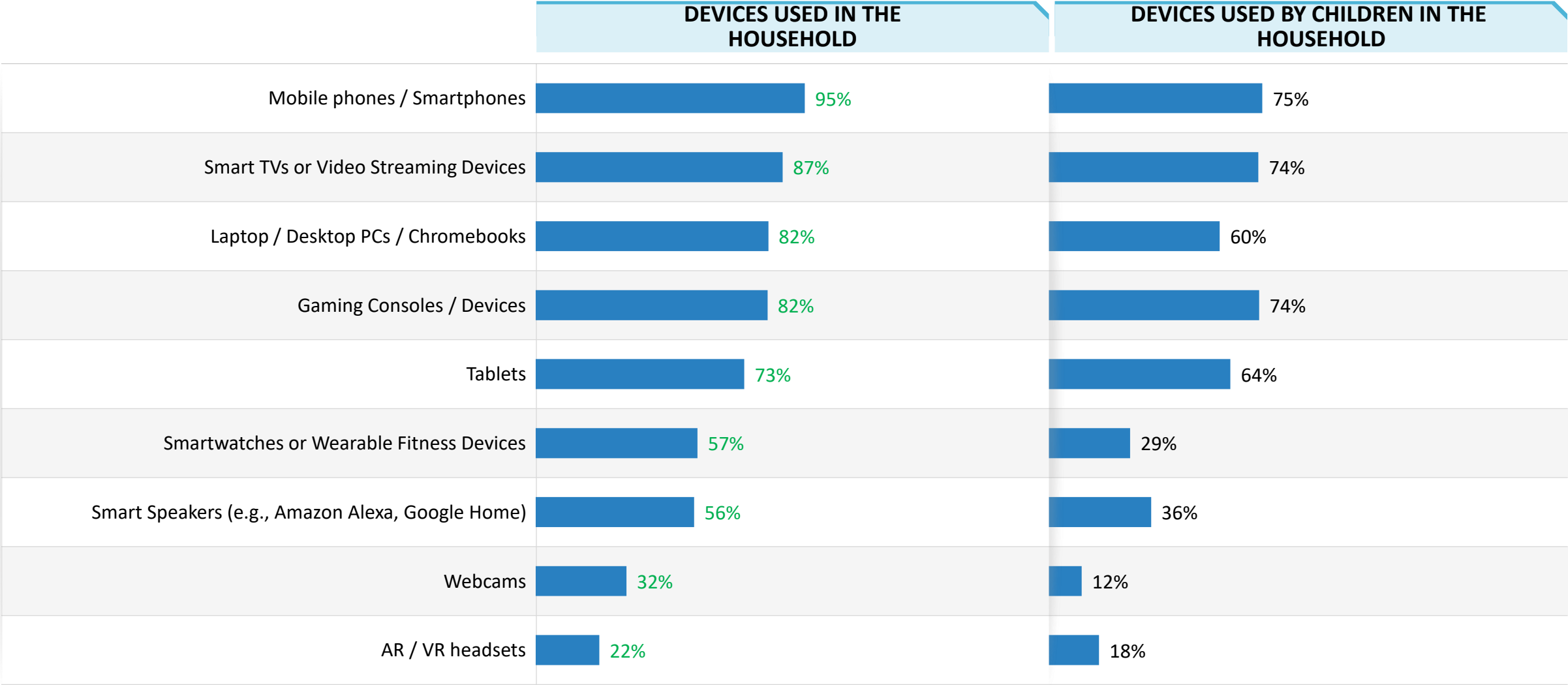
Parent technology capability is an important divide. About a third of parents have only basic skills or rely on others for help, creating a meaningful gap between the complexity of children's digital lives and some parents' ability to manage them.

Most parents are doing something to manage safety, but the central challenge is not access to tools—it is balancing oversight with trust and privacy. That tension becomes more pronounced as children get older and parents increasingly expect them to manage some risk themselves.

Connected tech devices are pervasive across households with kids



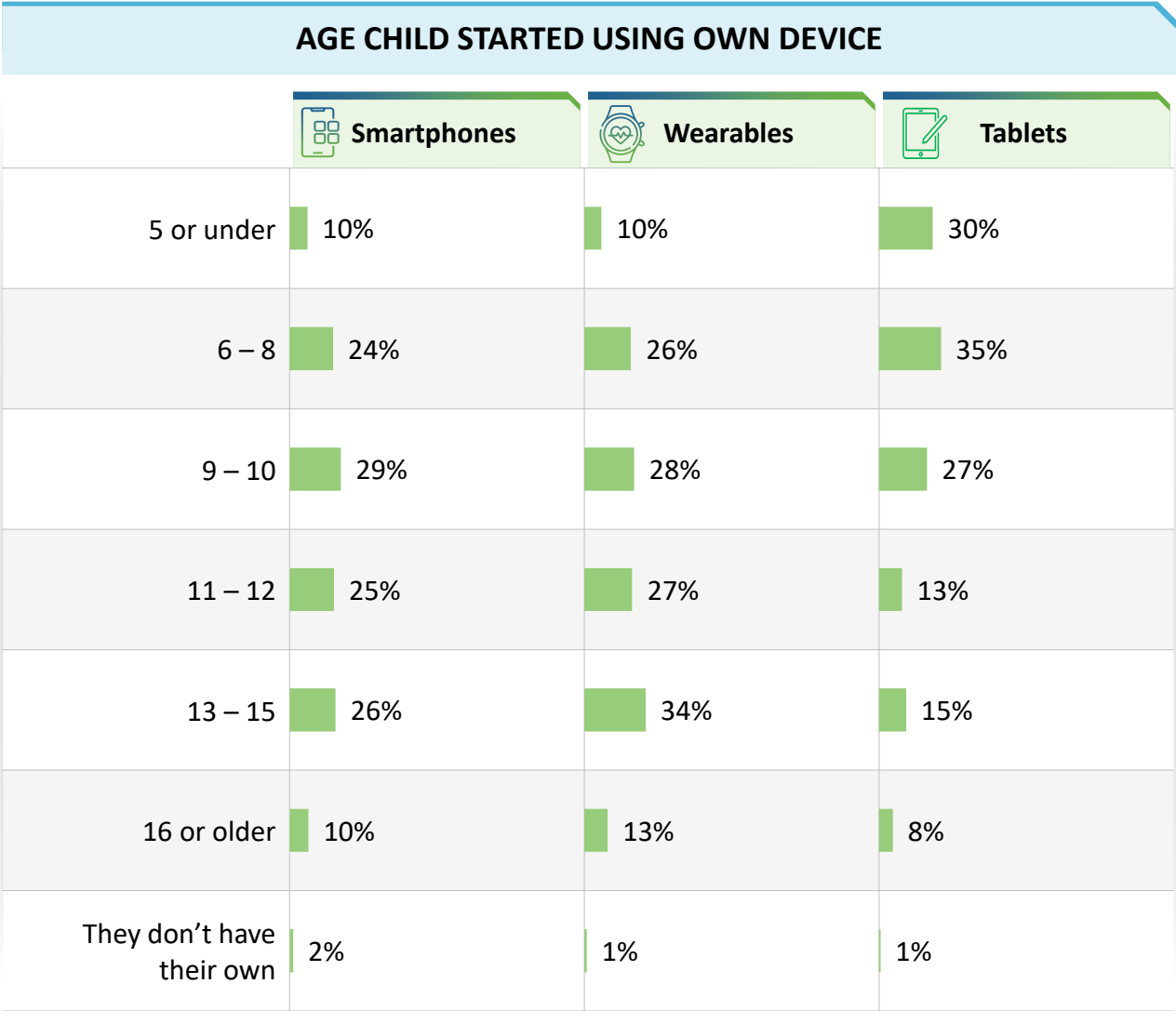
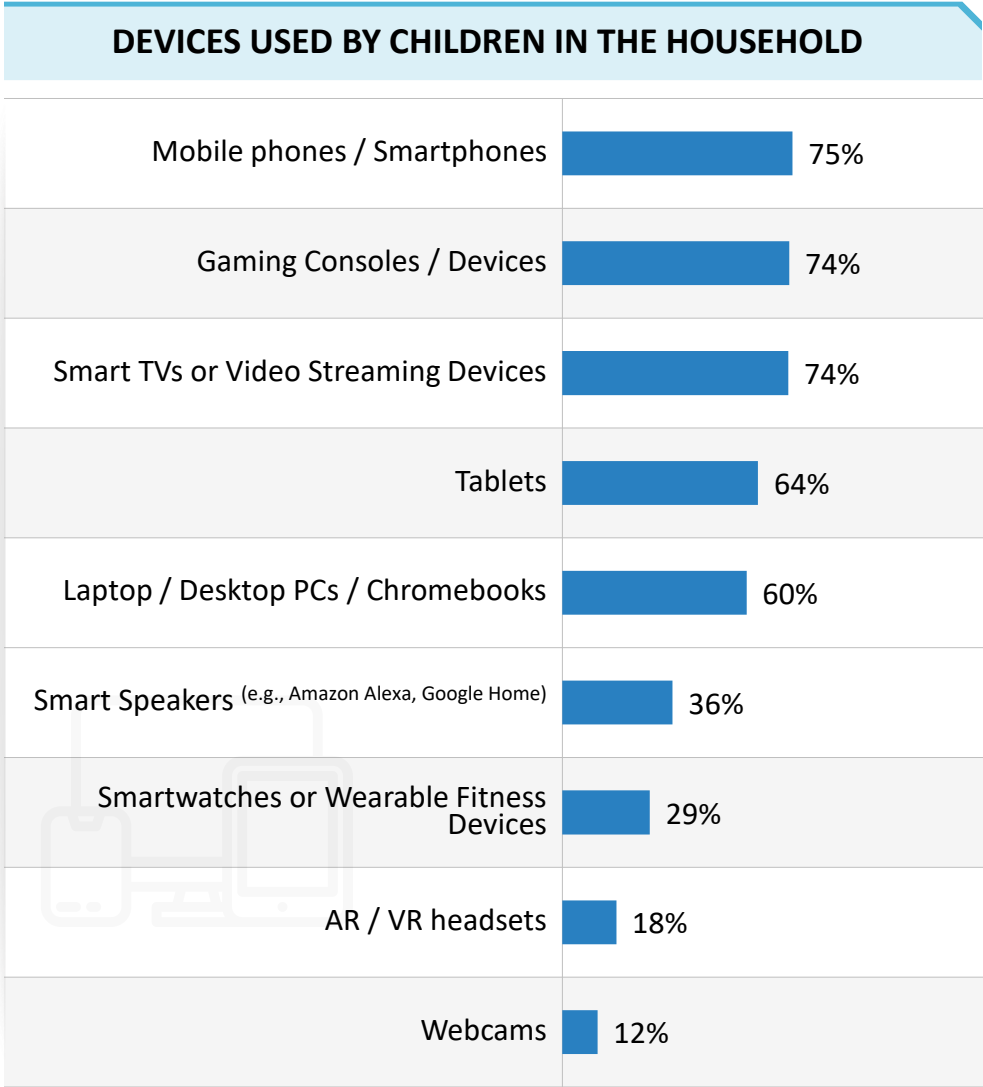
Device usage by children mirrors that of parents, although laptop usage, smartwatches, and webcam use is relatively lower



Numbers in Green indicates significant higher at 95% confidence level

Base: Total - 1014
T1. Which of the following devices are used in your household?, T2. Which of the following devices are used by children in your household?

The most common devices used by children are smartphones, gaming devices, and smart TVs; tablets are used by children earlier than other portable devices



Base: Total – 1014, Smartphone Users – 762, Wearables Users – 290, Tablets Users - 648
T2. Which of the following devices are used by children in your household?, T3. At about what age did your child(ren) start using their own DEVICE?

While tablet usage is more common among younger ages, usage of smartphones, gaming devices, laptops and other smart devices increases with age of children

DEVICES USED BY CHILDREN IN THE HOUSEHOLD

AGES OF CHILDREN IN THE HOUSEHOLD

	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Mobile phones / Smartphones	75%	60%	78% A	90% AB
Gaming Consoles / Devices	74%	67%	80% A	75% A
Smart TVs or Video Streaming Devices	74%	71%	77%	73%
Tablets	64%	65% C	69% C	57%
Laptop / Desktop PCs / Chromebooks	60%	47%	71% AC	64% A
Smart Speakers (e.g., Amazon Alexa, Google Home)	36%	26%	47% AC	35% A
Smartwatches or Wearable Fitness Devices	29%	22%	39% AC	24%
AR / VR headsets	18%	14%	22% A	17%
Webcams	12%	7%	15% A	13% A

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

T2. Which of the following devices are used by children in your household?

Letters in BLUE indicates significant difference at 95% confidence level

Device usage tends to build, with those using less common devices likely to use a wider range of devices overall

DEVICES USED BY CHILDREN IN THE HOUSEHOLD

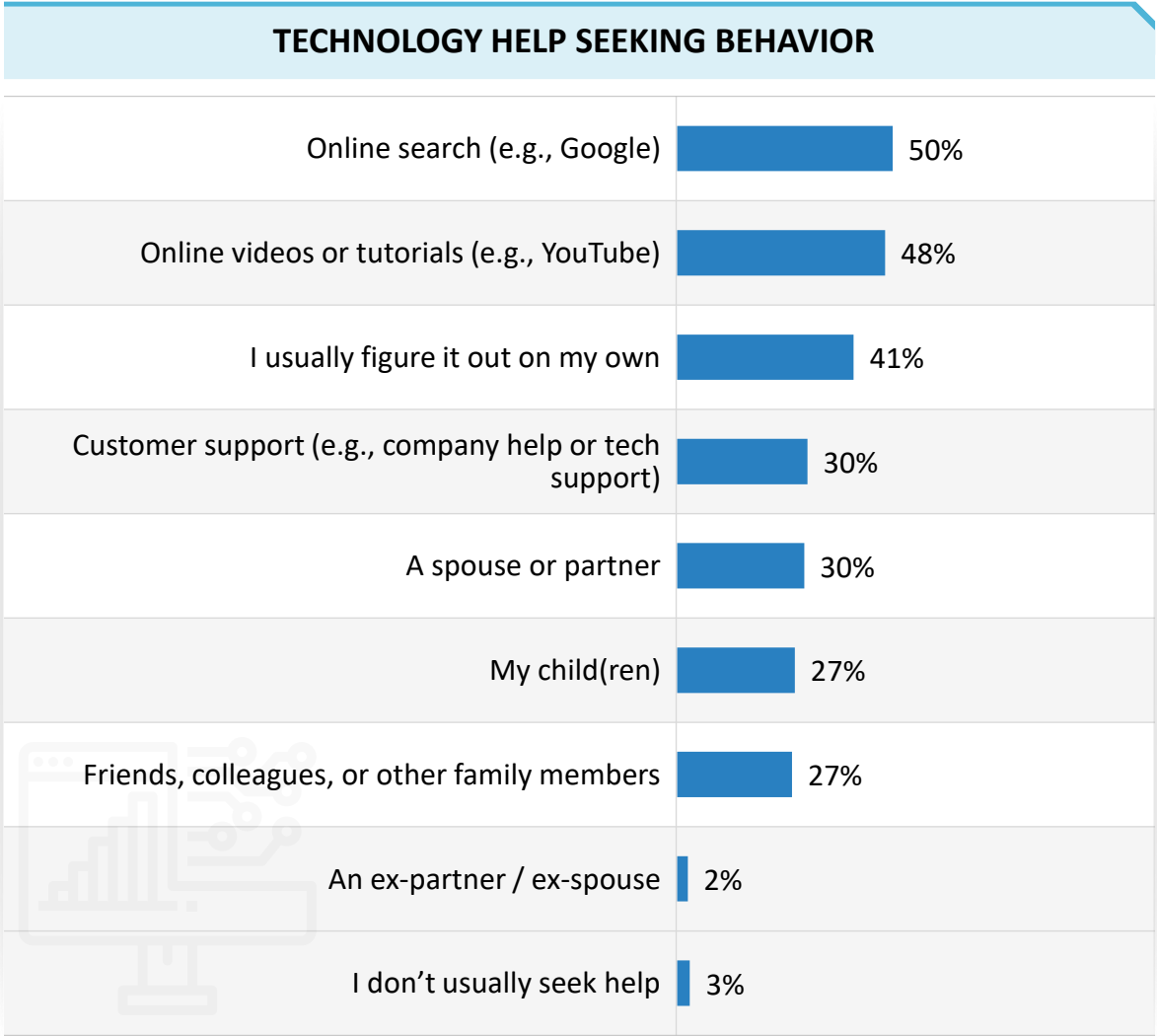
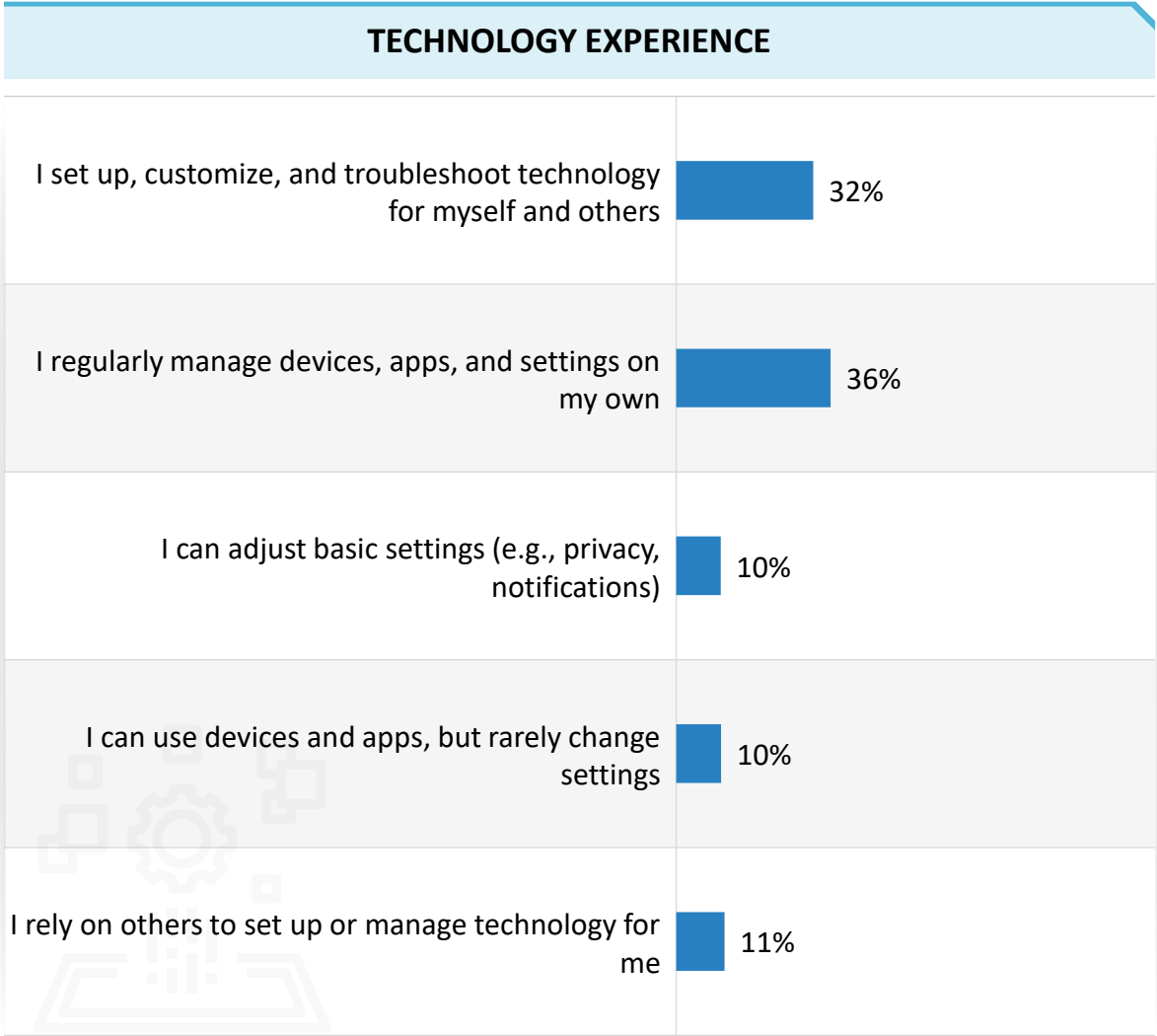
OTHER DEVICES USED	TOTAL	DEVICES USED BY CHILDREN IN THE HOUSEHOLD								
		Mobile phones / Smartphones (A)	Gaming Consoles / Devices (B)	Smart TVs or Video Streaming Devices (C)	Tablets (D)	Laptop / Desktop PCs / Chromebooks (E)	Smart Speakers (F)	Smartwatches or Wearable Fitness Devices (G)	AR / VR headsets (H)	Webcams (I)
Mobile phones / Smartphones	75%		79%	79%	78%	83% BCD	83% BCD	83% BCD	84% D	91% BCDEFG
Gaming Consoles / Devices	74%	78%		79%	79%	81% A	85% ACD	83% A	92% ACDEFG	87% ACDE
Smart TVs or Video Streaming Devices	74%	77%	79% E		80% E	76%	87% ABDEG	79%	88% ABDEG	90% ABDEG
Tablets	64%	66%	69% A	69% A		68%	72% AE	74% ABCE	71%	77% ABCE
Laptop / Desktop PCs / Chromebooks	60%	66% C	66% C	62%	64%		76% ABCD	79% ABCD	76% ABCD	90% ABCDFGH
Smart Speakers (e.g., Amazon Alexa, Google Home)	36%	40%	41%	42% A	41%	46% ABCD		65% ABCDEH	54% ABCDE	71% ABCDEH
Smartwatches or Wearable Fitness Devices	29%	32%	32%	31%	33% C	37% ABCD	52% ABCDEH		41% ABCD	60% ABCDEFH
AR / VR headsets	18%	20%	22% AD	21% A	20%	22% AD	27% ABCDE	26% ACD		39% ABCDEFG
Webcams	12%	14%	14%	14%	14%	17% ABCD	23% ABCDE	24% ABCDE	26% ABCDE	

Base: Total - 1014, Mobile phones / Smartphones - 762, Gaming Consoles / Devices - 751, Smart TVs or Video Streaming Devices - 748, Tablets - 648, Laptop / Desktop PCs / Chromebooks - 610,

Smart Speakers - 365, Smartwatches or Wearable Fitness Devices - 290, AR / VR headsets - 179, Webcams - 117

T2. Which of the following devices are used by children in your household?

About a third of parents have only basic tech skills or rely on others for support; top sources of help are online search and videos; 1 in 4 turn to their kids for help



Base: Total - 1014

T4. Which of the following best describes your experience with technology (e.g., devices, apps, settings)?, T5. When you need help with technology (e.g., devices, apps, settings), who or what do you typically turn to for help?

To help with technology, parents with both younger and older kids in the home are more likely to turn to online search or videos, and tech support; as the age of kids increases, the more likely parents are to turn to their kids for tech help

TECHNOLOGY HELP SEEKING BEHAVIOR

AGES OF CHILDREN IN THE HOUSEHOLD

	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Online search (e.g., Google)	50%	45%	58% AC	47%
Online videos or tutorials (e.g., YouTube)	48%	47%	57% AC	40%
I usually figure it out on my own	41%	41%	43%	39%
Customer support (e.g., company help or tech support)	30%	28%	35% AC	27%
A spouse or partner	30%	34% C	30%	24%
My child(ren)	27%	18%	30% A	36% A
Friends, colleagues, or other family members	27%	24%	29%	28%
An ex-partner / ex-spouse	2%	3%	2%	3%
I don't usually seek help	3%	5% B	1%	3%

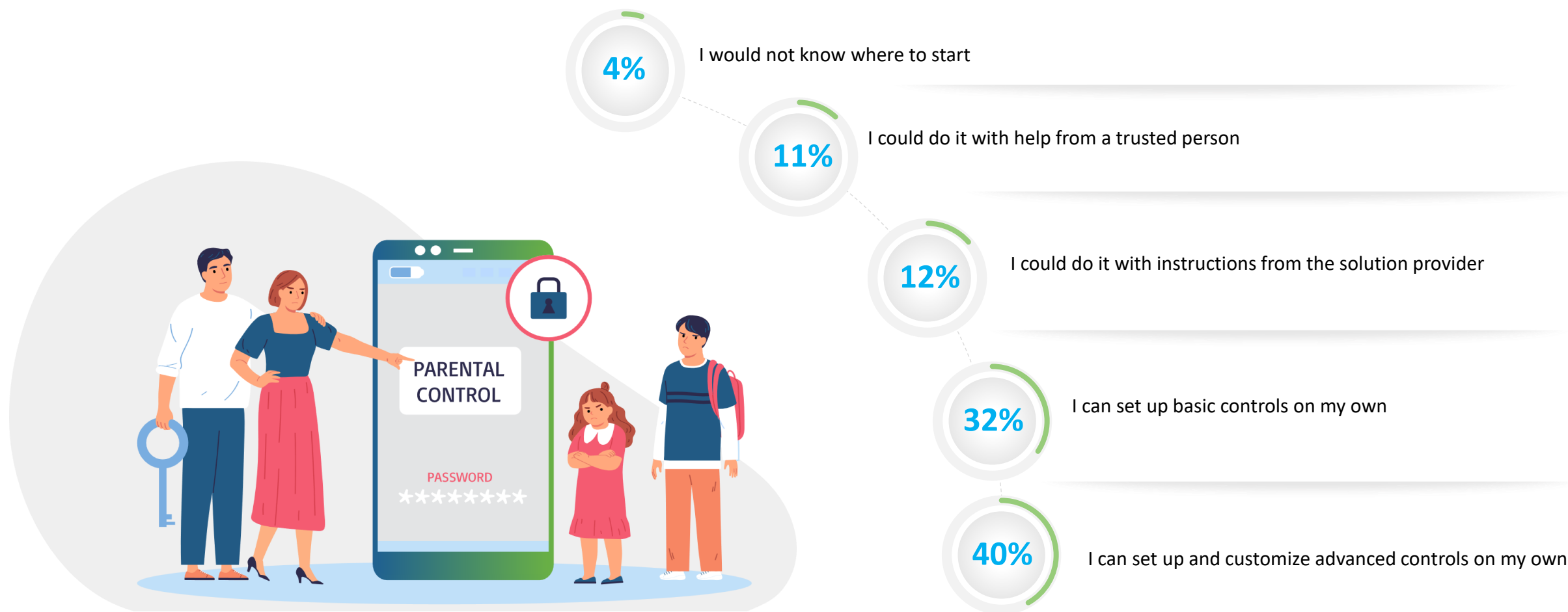
Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

T5. When you need help with technology (e.g., devices, apps, settings), who or what do you typically turn to for help?

Letters in BLUE indicates significant difference at 95% confidence level

Parents are confident in their abilities to set up parental controls, although about 1 in 4 would need help

PARENTAL CONTROL CAPABILITY

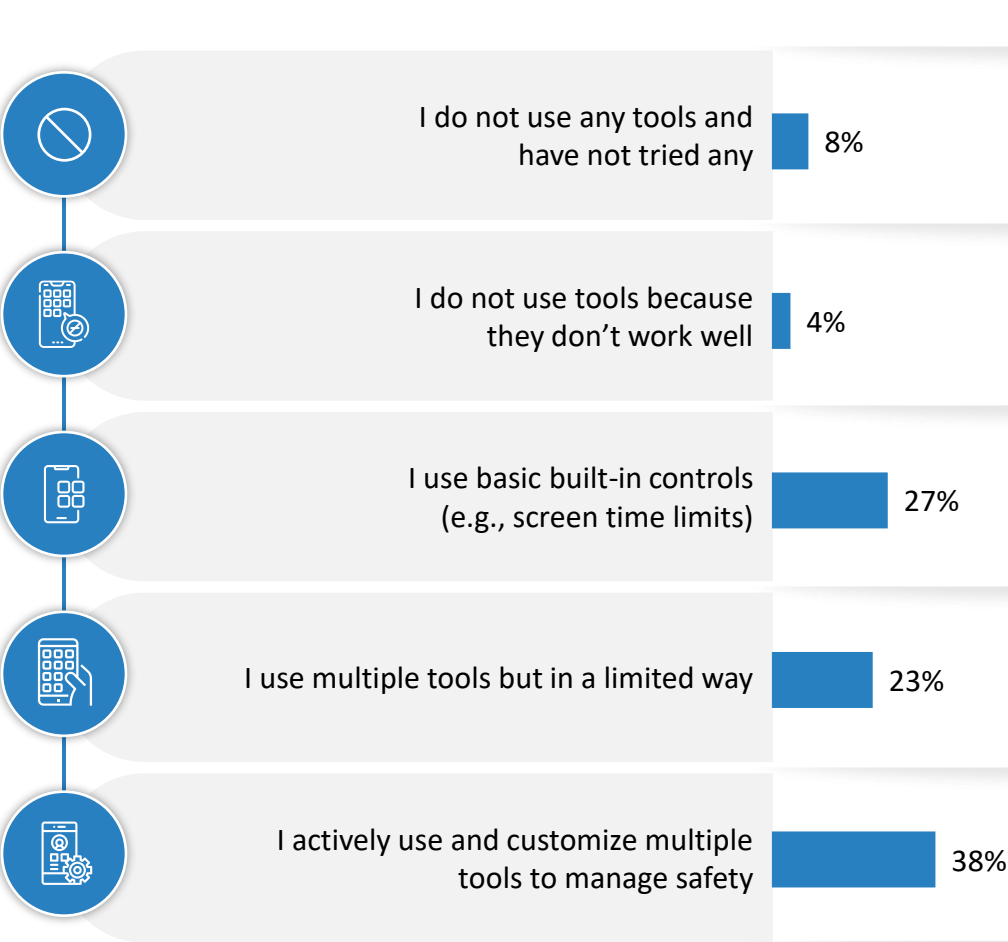


Base: Total - 1014

R2. Which of the following best describes your ability to set up parental controls or safety settings on devices or apps for your child(ren)?

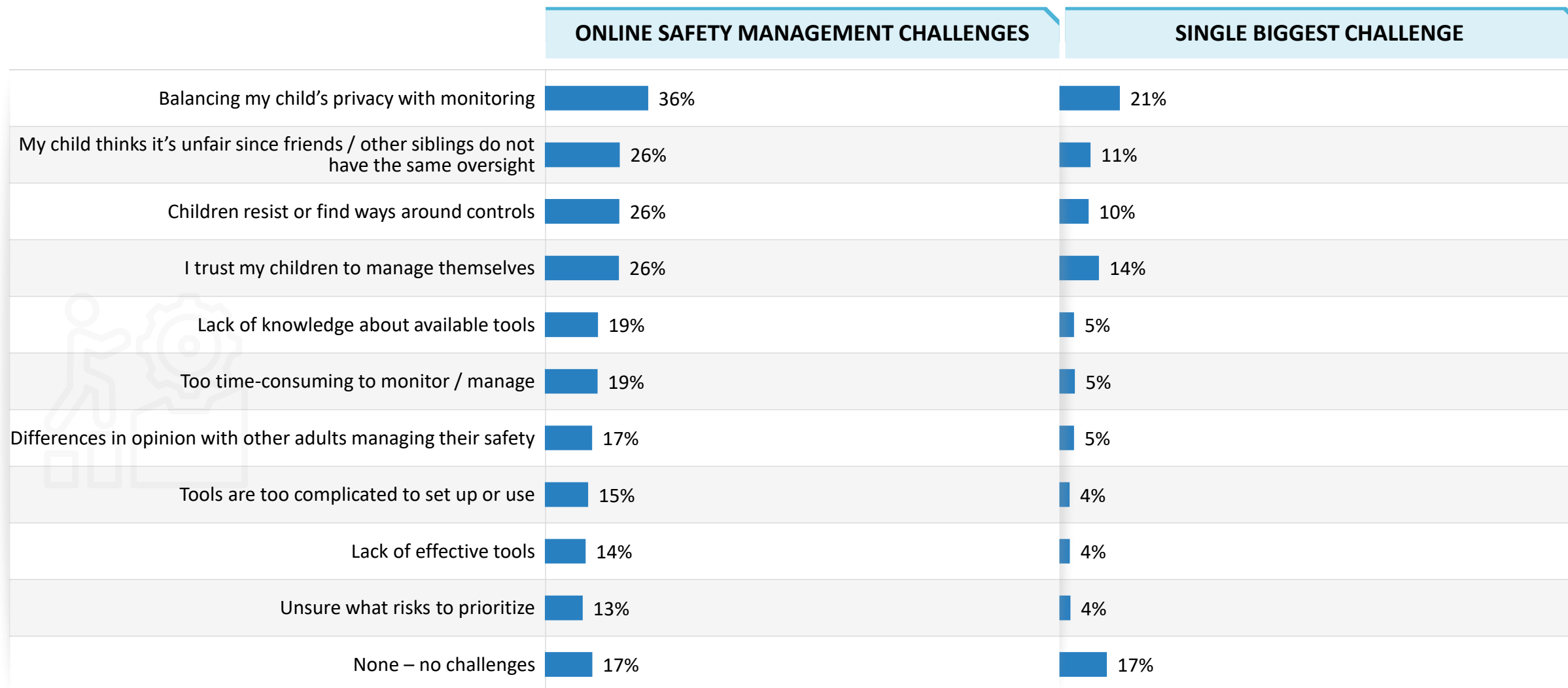
Nearly all parents use at least some type of tools to manage online safety, although 1 in 10 do not (most of whom have never tried)

CURRENT USE OF TOOLS



Base: Total - 1014
B1. Which of the following best describes your current use of tools to manage your children's online activity?

The #1 challenge when it comes to managing the online safety of children is balancing the child's privacy with monitoring



Base: Total - 1014

B2. What are the main challenges you face in managing your children's online safety?, B3. Which of these is the single biggest challenge you face in managing your children's online safety?

The greater parents perceive the risk to their children online, the more likely they are to find several challenges: child resists or evades controls, lack of knowledge about available tools, time-consuming to monitor, and tools are too complicated

ONLINE SAFETY MANAGEMENT CHALLENGES				
	TOTAL	RISK PERCEPTIONS		
		High (A)	Moderate (B)	Low (C)
Balancing my child's privacy with monitoring	36%	37%	38%	31%
My child thinks it's unfair since friends / other siblings do not have the same oversight	26%	29% C	27%	21%
Children resist or find ways around controls	26%	30% C	27% C	19%
I trust my children to manage themselves	26%	27%	25%	26%
Lack of knowledge about available tools	19%	23% C	19% C	13%
Too time-consuming to monitor / manage	19%	22% C	18%	14%
Differences in opinion with other adults managing their safety	17%	18%	16%	14%
Tools are too complicated to set up or use	15%	20% BC	14%	10%
Lack of effective tools	14%	14%	17% C	10%
Unsure what risks to prioritize	13%	11%	17% AC	9%
None – no challenges	17%	13%	16%	25% AB

Base: Total - 1014, Risk Perceptions: High - 333, Moderate - 467, Low - 214

B2. What are the main challenges you face in managing your children's online safety?, B3. Which of these is the single biggest challenge you face in managing your children's online safety?

Letters in BLUE indicates significant difference at 95% confidence level

Statements in bold are Top 3 single biggest challenges

As the age of kids in the house increases, so does the challenge of balancing their privacy with monitoring and trusting kids to manage their online safety themselves

ONLINE SAFETY MANAGEMENT CHALLENGES

AGES OF CHILDREN IN THE HOUSEHOLD

	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Balancing my child's privacy with monitoring	36%	31%	39% A	40% A
My child thinks it's unfair since friends / other siblings do not have the same oversight	26%	26%	32% C	20%
Children resist or find ways around controls	26%	22%	32% AC	24%
I trust my children to manage themselves	26%	20%	29% A	30% A
Lack of knowledge about available tools	19%	20%	21%	15%
Too time-consuming to monitor / manage	19%	18%	22% C	15%
Differences in opinion with other adults managing their safety	17%	17%	19% C	13%
Tools are too complicated to set up or use	15%	13%	20% AC	12%
Lack of effective tools	14%	15%	16%	12%
Unsure what risks to prioritize	13%	12%	17% AC	10%
None – no challenges	17%	19% B	12%	19% B

Letters in BLUE indicates significant difference at 95% confidence level

Statements in bold are Top 3 single biggest challenges

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293

B2. What are the main challenges you face in managing your children's online safety?, B3. Which of these is the single biggest challenge you face in managing your children's online safety?

Parents take a wide range of actions to keep their kids safe online, with the most common being to talk to their kids about safety and requiring kids to get their approval before downloading apps / purchases

ONLINE SAFETY MANAGEMENT ACTIONS TAKEN



Talk regularly with my children about online safety	45%
Require my children to get my approval before downloading apps or making purchases	41%
Set rules about which apps, games, or websites are allowed	37%
Monitor my children’s browsing or app usage	37%
Use parental control software or apps	36%
Set rules about when or how long my child can be online	34%
Use built-in device controls (e.g., screen time, app restrictions)	33%
Check my children’s social media activity	33%
Restrict or disable certain features (e.g., chat, location sharing)	33%
Check my children’s messages	31%
Use content filters or safe search settings	29%
Keep devices in shared / common areas of the home	26%
None – I don’t currently take any specific actions	6%

Base: Total - 1014
B4. Which of the following actions, if any, do you currently take to manage your children’s online safety?

Parents who are tech savvy take a wider range of actions when it comes to managing their children's online safety

ONLINE SAFETY MANAGEMENT ACTIONS TAKEN

	TOTAL	TECH EXPERIENCE	
		Experienced (A)	Inexperienced (B)
Talk regularly with my children about online safety	45%	48% B	37%
Require my children to get my approval before downloading apps or making purchases	41%	44% B	34%
Set rules about which apps, games, or websites are allowed	37%	42% B	28%
Monitor my children's browsing or app usage	37%	42% B	27%
Use parental control software or apps	36%	40% B	28%
Set rules about when or how long my child can be online	34%	38% B	27%
Use built-in device controls (e.g., screen time, app restrictions)	33%	36% B	27%
Check my children's social media activity	33%	35%	29%
Restrict or disable certain features (e.g., chat, location sharing)	33%	36% B	26%
Check my children's messages	31%	32%	30%
Use content filters or safe search settings	29%	32% B	23%
Keep devices in shared / common areas of the home	26%	30% B	18%
None – I don't currently take any specific actions	6%	5%	7%

Letters in **BLUE** indicates significant difference at 95% confidence level

Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

B4. Which of the following actions, if any, do you currently take to manage your children's online safety?

The actions parents take to manage online safety are similar regardless of the ages of the kids in the house; parents of older kids are less likely to use built-in device controls, restrict certain features, or keep devices in shared areas

ONLINE SAFETY MANAGEMENT ACTIONS TAKEN

	AGES OF CHILDREN IN THE HOUSEHOLD			
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Talk regularly with my children about online safety	45%	44%	42%	49%
Require my children to get my approval before downloading apps or making purchases	41%	42%	44% C	36%
Set rules about which apps, games, or websites are allowed	37%	38%	39%	35%
Monitor my children’s browsing or app usage	37%	38%	38%	34%
Use parental control software or apps	36%	39%	37%	32%
Set rules about when or how long my child can be online	34%	34%	35%	34%
Use built-in device controls (e.g., screen time, app restrictions)	33%	36% C	37% C	26%
Check my children’s social media activity	33%	27%	35% A	39% A
Restrict or disable certain features (e.g., chat, location sharing)	33%	35% C	37% C	25%
Check my children’s messages	31%	29%	33%	32%
Use content filters or safe search settings	29%	30%	29%	28%
Keep devices in shared / common areas of the home	26%	31% C	27% C	19%
None – I don’t currently take any specific actions	6%	4%	4%	9% AB

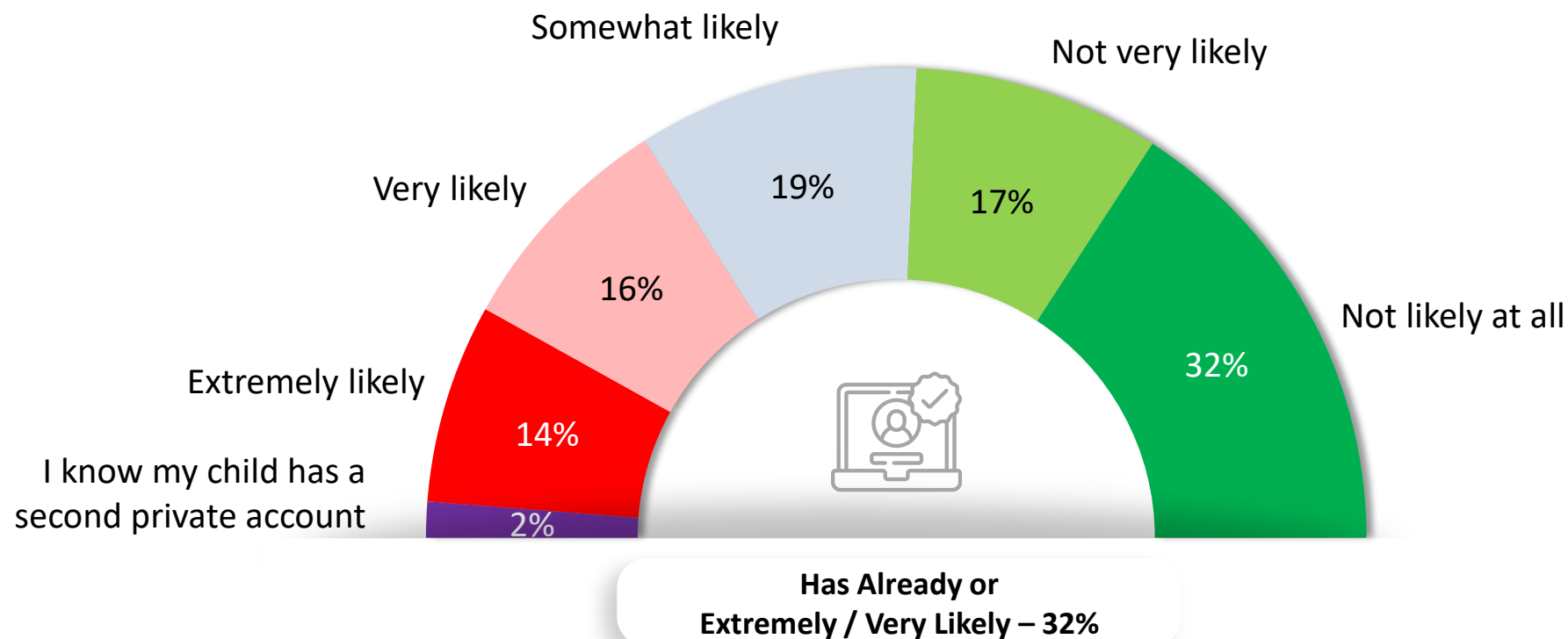
Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293

B4. Which of the following actions, if any, do you currently take to manage your children's online safety?

A third think it's highly likely their child has a private account so they can share content without certain people seeing it

LIKELIHOOD CHILD HAS PRIVATE ACCOUNT



Base: Total – 1014

B5. How likely do you think it is that your child(ren) has a second / private account (e.g., on an app, email, etc.) so they can share content without certain people seeing it?

The higher the perceived online risk, the more likely parents are to think their child has a private account so certain people won't see

LIKELIHOOD CHILD HAS PRIVATE ACCOUNT				
	TOTAL	RISK PERCEPTIONS		
		High (A)	Moderate (B)	Low (C)
Has already / Extremely / Very Likely	32%	45% BC	29% C	18%
I know my child has a second private account	2%	3%	3%	2%
Extremely likely	14%	27% BC	7%	7%
Very likely	16%	15% C	19% C	9%
Somewhat likely	19%	15%	23% A	18%
Not very likely	17%	14%	19%	17%
Not likely at all	32%	26%	29%	47% AB

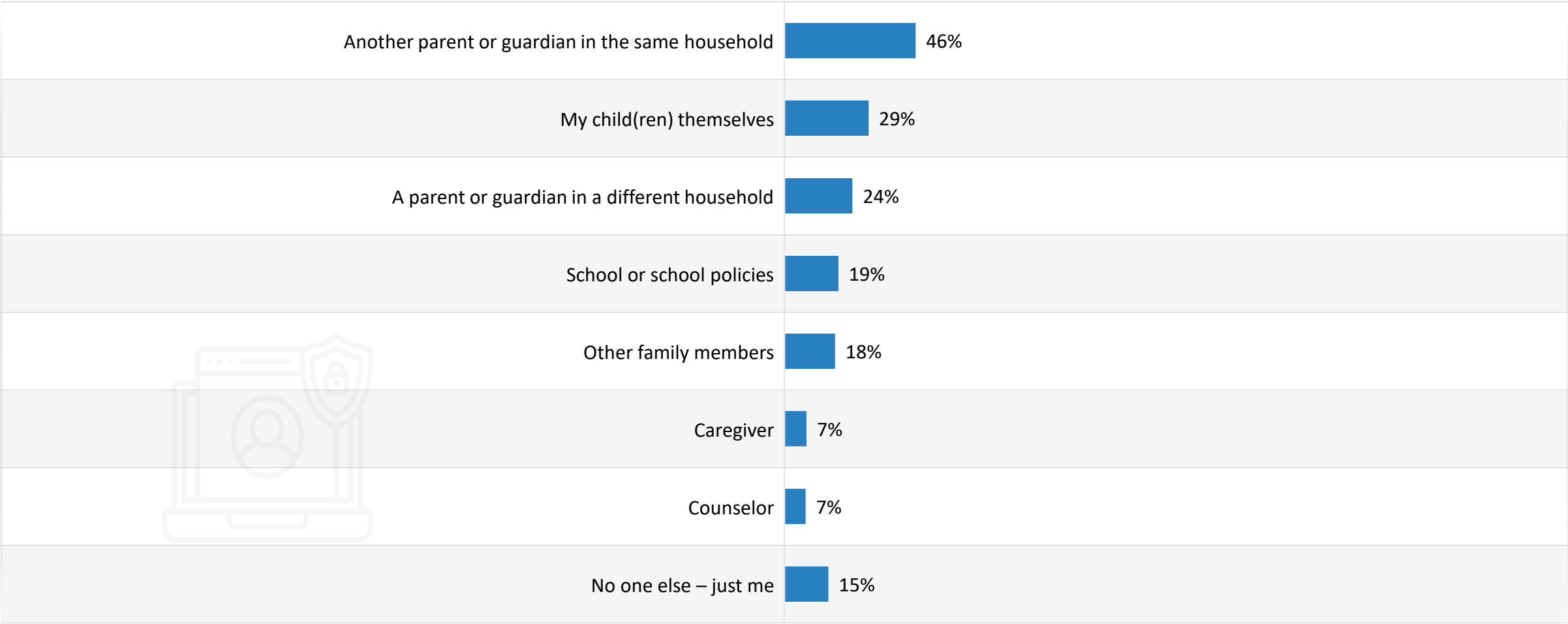
Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Risk Perceptions: High - 333, Moderate - 467, Low - 214

B5. How likely do you think it is that your child(ren) has a second / private account (e.g., on an app, email, etc.) so they can share content without certain people seeing it?

Another parent is most often involved when it comes to decisions about their children’s online safety and 3 in 10 involve the child themselves

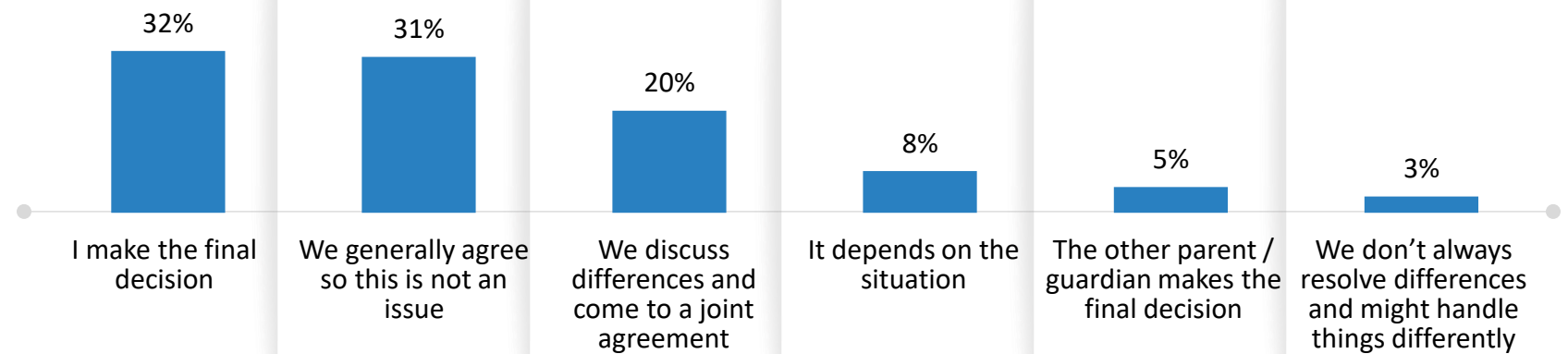
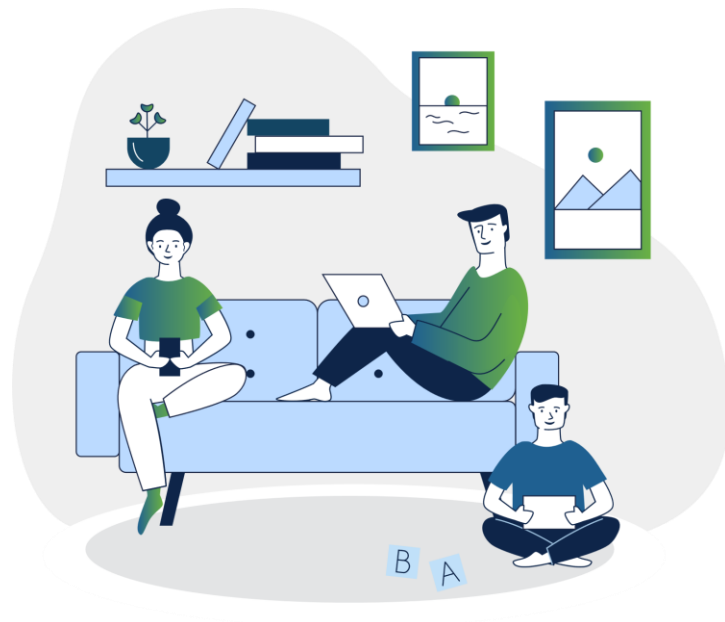
WHO IS INVOLVED IN CHILD’S ONLINE SAFETY



Base: Total - 1014
B12. Who else is involved in decisions about online safety for your child(ren) / what your child(ren) is allowed or not allowed to do (e.g., activities, bedtime/curfew, online access, gaming, etc.)?

While 3 in 10 parents say they generally agree with other adults in how to keep kids safe online, when differences arise, this typically results in one person making the decision or discussing to come to an agreement

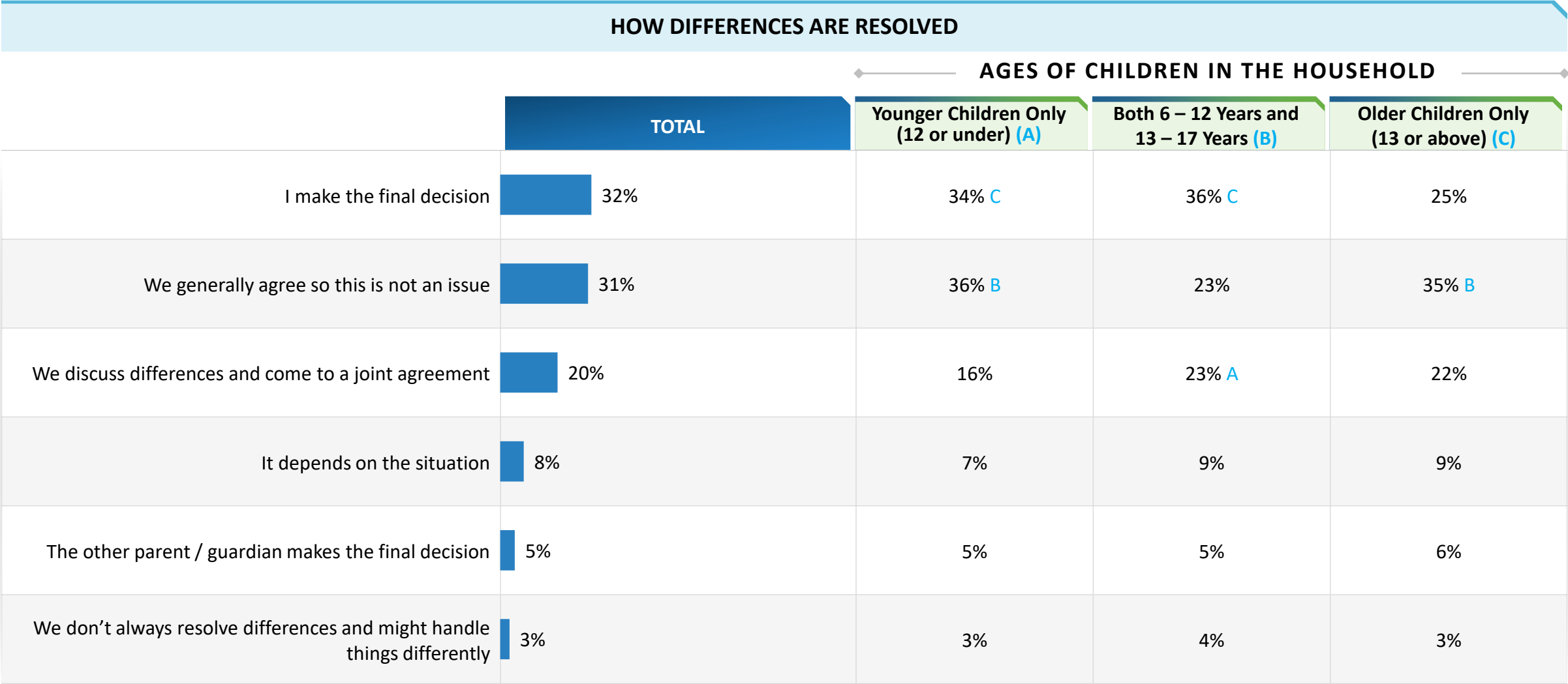
HOW DIFFERENCES ARE RESOLVED



Base (Those involved in the child's online safety): Total - 860

B13. How do you typically resolve differences in opinion with others involved in decisions about online safety for your child(dren)?

Parents with older kids are less likely to resolve differences themselves and are more likely to discuss issues and come to a joint agreement



Base (Those involved in the child's online safety): Total - 860, Age of Child: 12 or under - 311, Both 6-12 years and 13-17 years – 318, 13 or above - 231
B13. How do you typically resolve differences in opinion with others involved in decisions about online safety for your child(dren)?

Letters in BLUE indicates significant difference at 95% confidence level



SA MARKET
INSIGHTS

COMMUNICATIONS



SUMMARY: COMMUNICATIONS

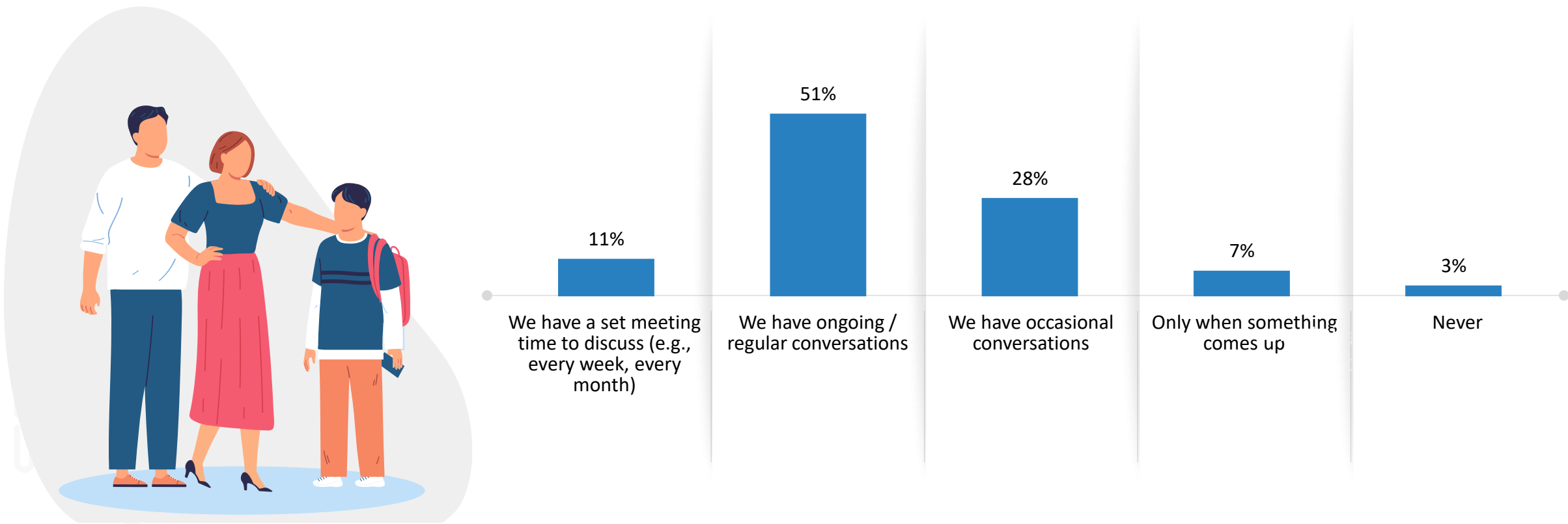
Online safety is part of the family conversation, but frequency does not necessarily equal structure. Six in ten have regular or scheduled discussions, yet only about a third describe their approach as setting clear rules and expectations.

Parents are discussing a broad range of risks, particularly strangers, speaking up when something feels wrong, personal information, scams and content sharing. More tech-confident parents tend to cover a wider range of topics.

The communication dynamic changes as children age. Parents remain the expected first line of disclosure, but older children are increasingly expected to turn to friends, and conversations become more likely to originate with the child rather than the parent.

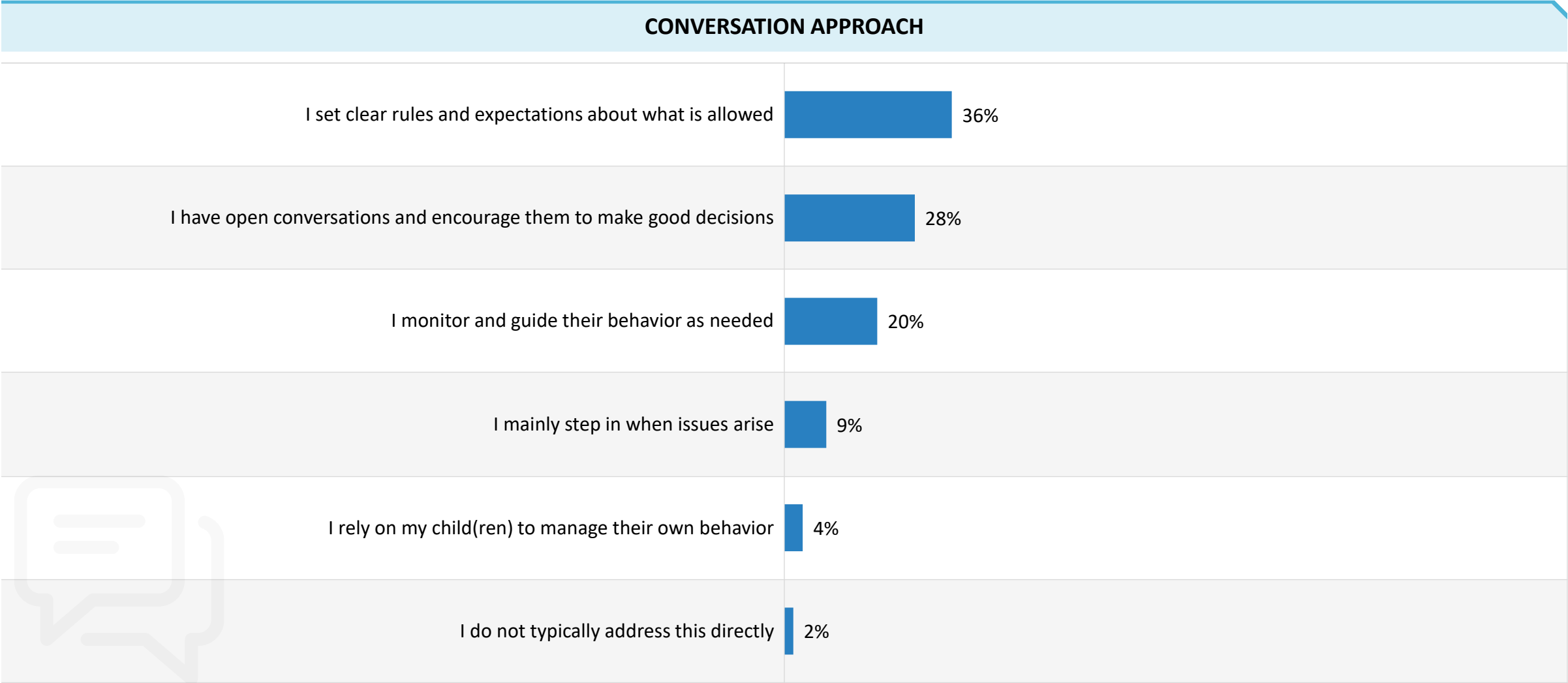
6 in 10 say they have regular or set discussions with their children about online safety and appropriate behavior

FREQUENCY OF COMMUNICATIONS WITH CHILD



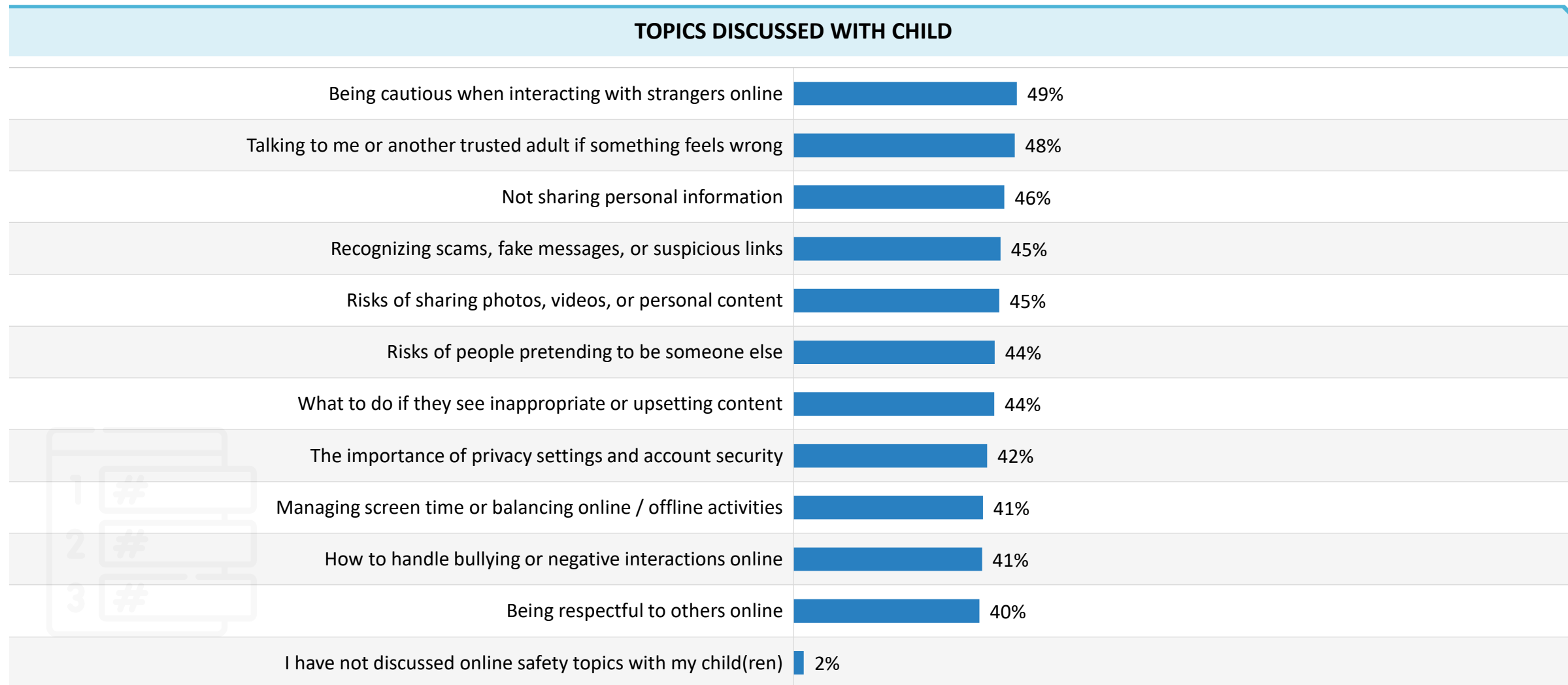
Base: Total - 1014
B6. How often do you talk with your child(ren) about online safety and appropriate online behavior?

Only a third of parents set clear rules with their children about what they can and cannot do online, and many have no specific approach to the topic



Base: Total - 1014
B8. Which of the following statements best describes how you approach conversations about online safety with your child(ren)?

Parents cover a wide range of topics with their children, topped by caution when interacting with strangers online and talking to a trusted adult if something feels off



Base: Total - 1014

B7. Which of the following topics, if any, have you discussed with your child(ren) regarding online safety?

Techier parents also discuss a wider range of topics with their children regarding online safety

TOPICS DISCUSSED WITH CHILD			
	TOTAL	TECH EXPERIENCE	
		Experienced (A)	Inexperienced (B)
Being cautious when interacting with strangers online	49%	52% B	41%
Talking to me or another trusted adult if something feels wrong	48%	51% B	42%
Not sharing personal information	46%	49% B	39%
Recognizing scams, fake messages, or suspicious links	45%	48% B	38%
Risks of sharing photos, videos, or personal content	45%	49% B	37%
Risks of people pretending to be someone else	44%	48% B	34%
What to do if they see inappropriate or upsetting content	44%	48% B	34%
The importance of privacy settings and account security	42%	46% B	34%
Managing screen time or balancing online / offline activities	41%	44% B	35%
How to handle bullying or negative interactions online	41%	44% B	35%
Being respectful to others online	40%	43% B	34%
I have not discussed online safety topics with my child(ren)	2%	2%	2%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

B7. Which of the following topics, if any, have you discussed with your child(ren) regarding online safety?

Parents are more likely to discuss some topics with older children: online interaction with strangers, not sharing personal info, recognizing scams, risks of sharing personal content, others pretending to be someone else, and bullying

TOPICS DISCUSSED WITH CHILD				
	TOTAL	AGES OF CHILDREN IN THE HOUSEHOLD		
		Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Being cautious when interacting with strangers online	49%	45%	44%	59% AB
Talking to me or another trusted adult if something feels wrong	48%	45%	49%	52%
Not sharing personal information	46%	42%	41%	56% AB
Recognizing scams, fake messages, or suspicious links	45%	38%	45% A	54% AB
Risks of sharing photos, videos, or personal content	45%	44%	42%	50% B
Risks of people pretending to be someone else	44%	39%	44%	50% A
What to do if they see inappropriate or upsetting content	44%	45%	44%	41%
The importance of privacy settings and account security	42%	38%	46% A	42%
Managing screen time or balancing online / offline activities	41%	39%	47% AC	38%
How to handle bullying or negative interactions online	41%	35%	42%	46% A
Being respectful to others online	40%	40%	40%	41%
I have not discussed online safety topics with my child(ren)	2%	3%	1%	3%

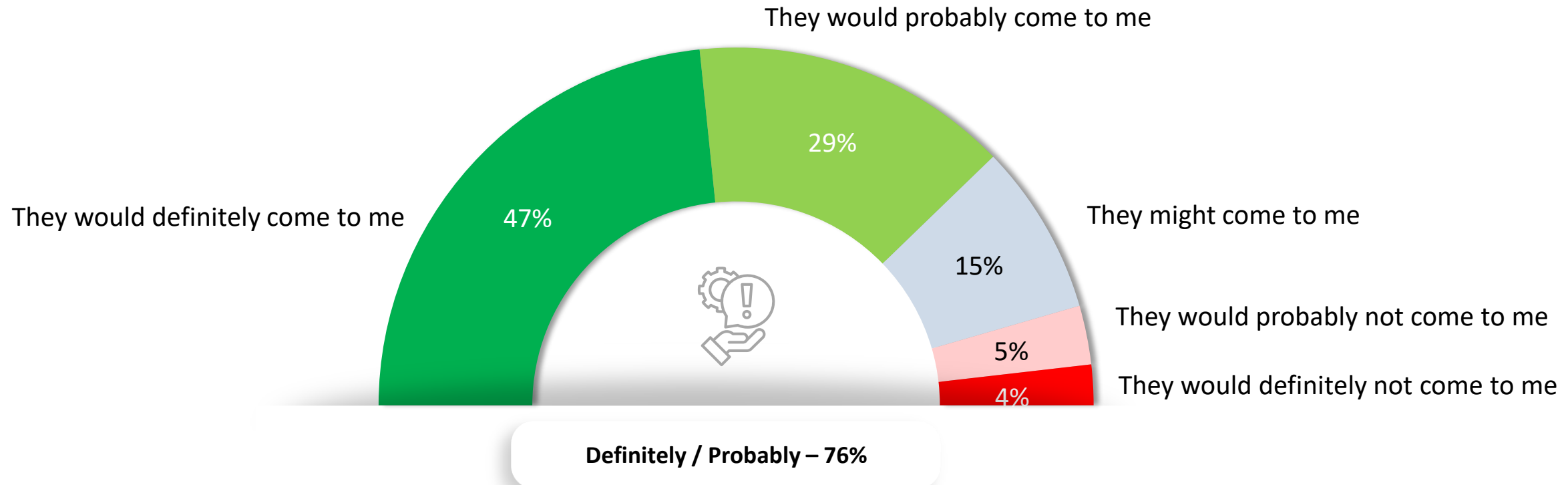
Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293

B7. Which of the following topics, if any, have you discussed with your child(ren) regarding online safety?

Very few believe their child would *not* come to them if they experienced something concerning online

LIKELIHOOD TO COME TO PARENT WITH ISSUE

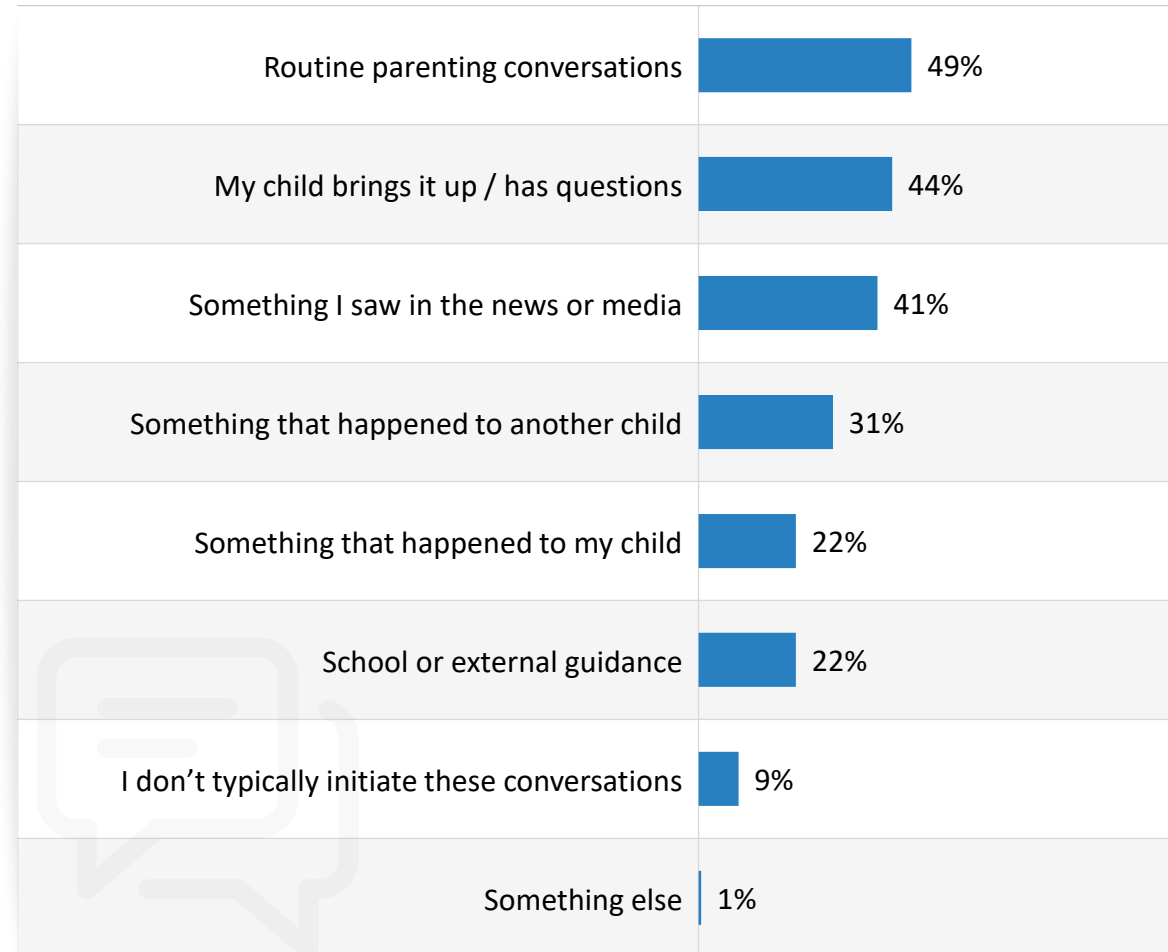


Base: Total - 1014

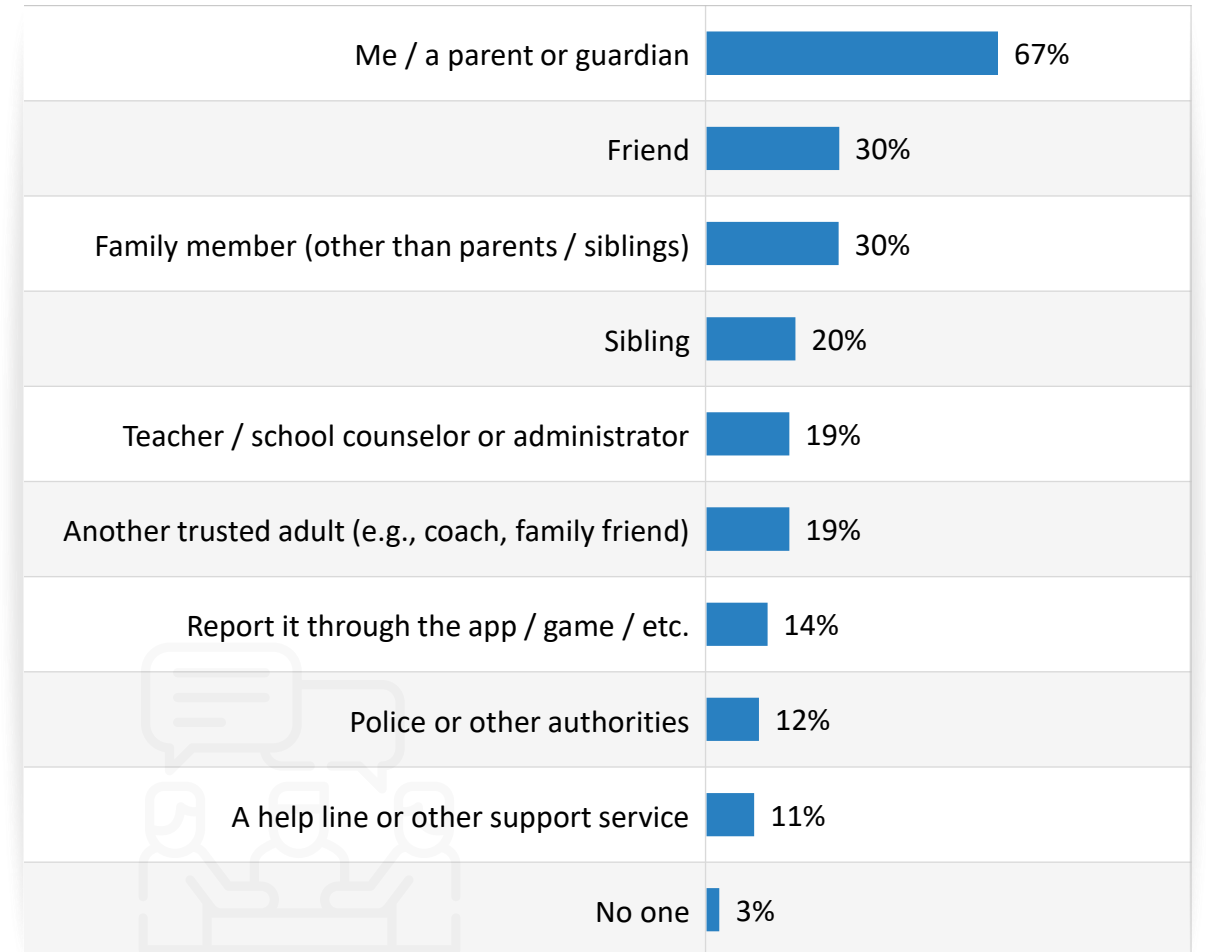
B9. How likely do you think your child(ren) is to come to you if they experience something concerning online?

Half of conversations about online safety are considered routine, followed by the child bringing up a question, or seeing something in the news; nearly all think their child would tell someone about a concerning experience

WHAT PROMPTS CONVERSATIONS



WHO WOULD CHILD TELL



Base: Total - 1014

B10. If your child(ren) experienced something concerning online, who do you think they are most likely to tell?, **B11.** What prompts conversations about online safety with your child(ren)?

Conversations are more likely to be brought up by older kids when they have questions

WHAT PROMPTS CONVERSATIONS

AGES OF CHILDREN IN THE HOUSEHOLD

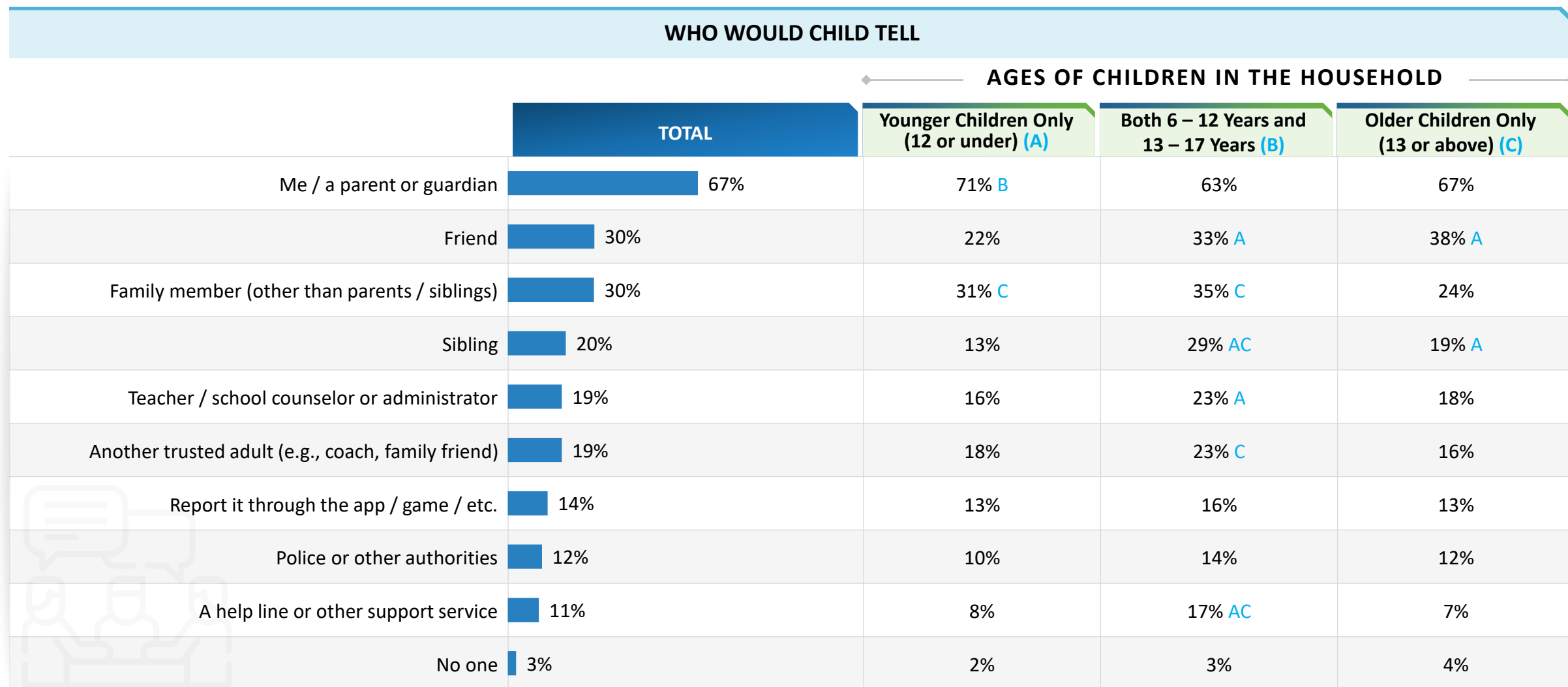
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Routine parenting conversations	49%	48%	49%	50%
My child brings it up / has questions	44%	39%	47% A	48% A
Something I saw in the news or media	41%	41%	44%	39%
Something that happened to another child	31%	30%	32%	30%
Something that happened to my child	22%	21%	26% C	19%
School or external guidance	22%	21%	29% AC	15%
I don't typically initiate these conversations	9%	9%	9%	10%
Something else	1%	1%	1%	0%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

B11. What prompts conversations about online safety with your child(ren)?

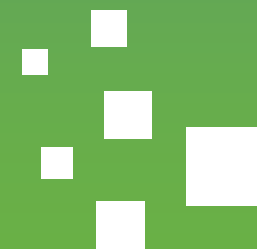
Parents with older kids are more likely to say their kids would tell a friend if something concerning happened online, while those with younger and older kids are more likely to say they'd tell a sibling



Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293
B10. If your child(ren) experienced something concerning online, who do you think they are most likely to tell?

Letters in **BLUE** indicates significant difference at 95% confidence level

APPS / PLATFORMS



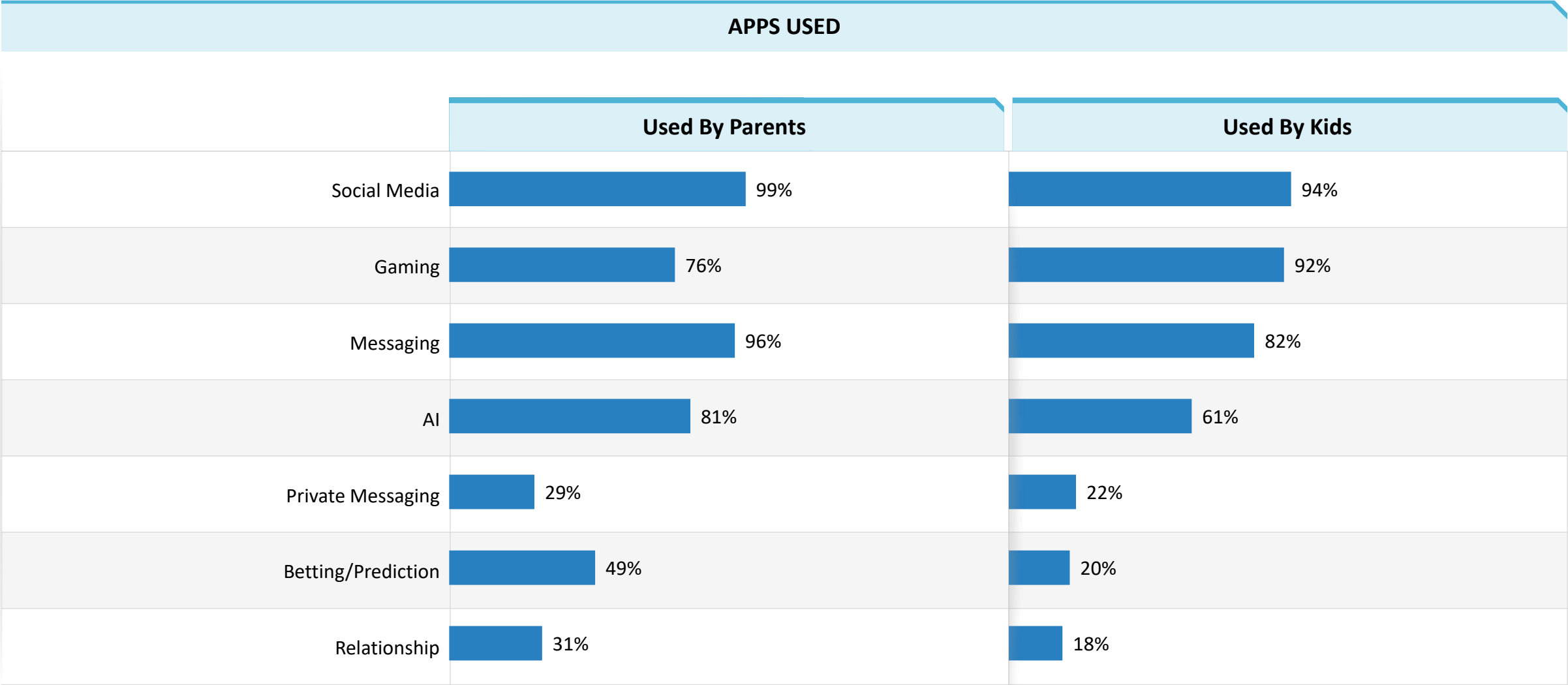
SUMMARY: APPS AND PLATFORMS

Children's app ecosystems broadly mirror those of their parents, but with important differences: gaming is disproportionately skewed to children, while AI, betting/prediction and relationship apps currently skew more toward parental use.

As children get older, the management model shifts from control toward negotiated independence. Parents of older children are more likely to justify potentially risky platforms based on trust, socialization and independence/privacy, while relying less heavily on parental controls.

Allowing potentially risky apps is generally a conscious trade-off rather than a lack of awareness. Trust in the child is the leading rationale, followed by confidence that controls or the family itself can manage the risk—highlighting the importance of solutions that enable participation rather than simply block it.

While most app usage among children follows Parental use, a few differences exist, with Gaming disproportionately higher among children and AI, Gambling / Prediction and relationship apps more common among Parents



Base: Total - 1014
U2a – U20a. Which of these do you, personally, use on a regular basis?, U2b – U20b. Which of these does your child(ren) use on a regular basis?

Children using specific types of apps / platforms are likely to have parents who use the same platforms; only gaming apps have somewhat lower use among parents

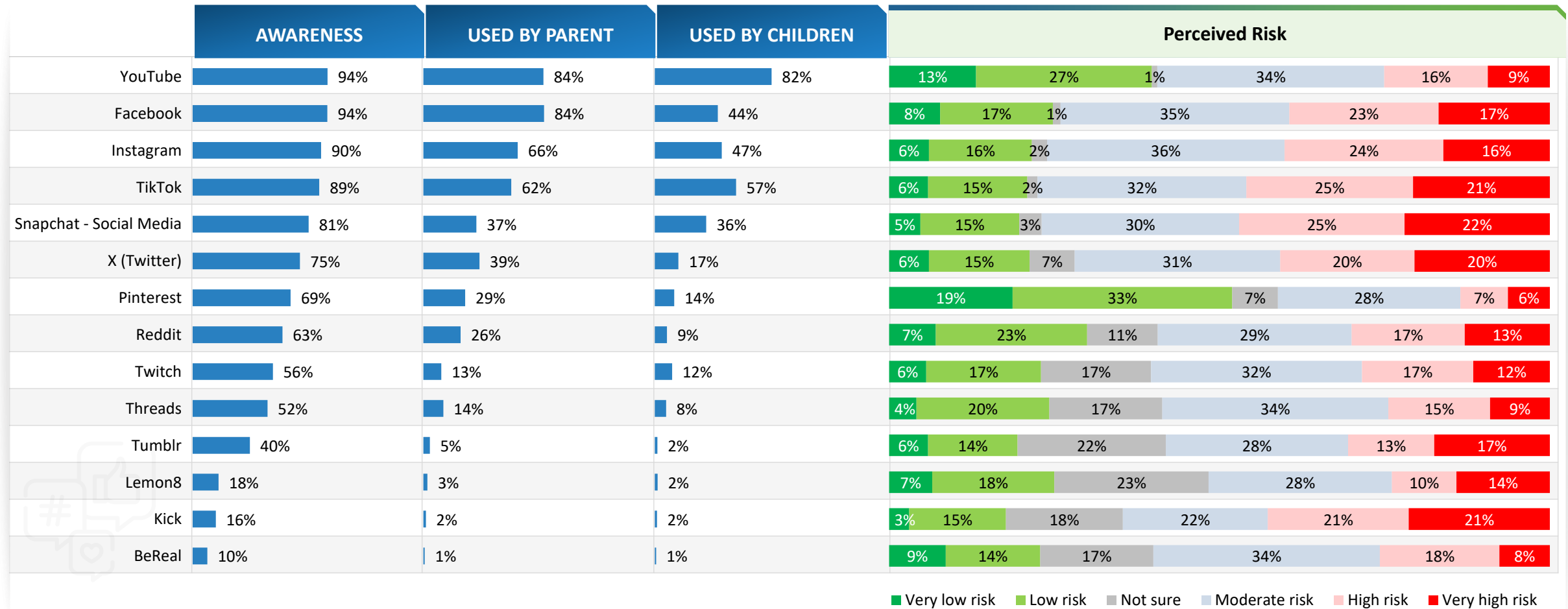
TYPES OF APPS / PLATFORMS USED								
APPS USED BY PARENTS	TOTAL	APPS USED BY KIDS						
		Social Media (A)	Gaming (B)	Messaging (C)	AI (D)	Private Messaging (E)	Betting/Prediction (F)	Relationship (G)
Social Media	99%	100%	100%	100%	100%	100%	100%	100%
Gaming	76%	77%	80% A	80% A	86% ABC	99% ABCD	99% ABCD	99% ABCD
Messaging	96%	96%	97% A	98% AB	98% A	100%	100% ABCD	99% ABC
AI	81%	83%	83%	85% AB	95% ABC	99% ABCD	98% ABC	98% ABCD
Private Messaging	29%	30%	31% A	33% AB	43% ABC	96% ABCDFG	76% ABCD	85% ABCDF
Betting/Prediction	49%	51%	52% A	55% AB	65% ABC	93% ABCD	100%	95% ABCD
Relationship	31%	33%	34% A	36% AB	45% ABC	86% ABCDF	80% ABCD	96% ABCDEF

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Social Media - 958, Gaming - 934, Messaging - 833, AI - 621, Private Messaging - 228, Betting / Prediction - 207, Relationship - 182
 U2a - U20a. Which of these do you, personally, use on a regular basis?, U2b - U20b. Which of these does your child(ren) use on a regular basis?

Snapshot: Social Media Platforms

SOCIAL MEDIA PLATFORMS



Base: Total - 1014, Awareness: YouTube - 958, Facebook - 956, Instagram - 912, TikTok - 899, Snapchat - 823, X (Twitter) - 762, Pinterest - 695, Reddit - 637, Twitch - 570, Threads - 532, Tumblr - 406, Lemon8 - 184, Kick - 164, BeReal - 105

U1. Which of the following social media content / platforms have you heard of before today?, U2a. Which of these do you, personally, use on a regular basis?, U2b. Which of these does your child(ren) use on a regular basis?,

U3. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

As children get older, use of these social media platforms increases

SOCIAL MEDIA PLATFORMS – USED BY CHILDREN

AGES OF CHILDREN IN THE HOUSEHOLD

	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
YouTube	82%	79%	87% AC	79%
TikTok	57%	41%	65% A	68% A
Instagram	47%	27%	62% AC	53% A
Facebook	44%	29%	54% A	51% A
Snapchat – Social Media	36%	20%	46% A	45% A
X (Twitter)	17%	11%	24% AC	14%
Pinterest	14%	8%	17% A	17% A
Twitch	12%	10%	17% AC	9%
Reddit	9%	7%	11% A	8%
Threads	8%	4%	10% A	10% A
Lemon8	2%	1%	2%	3%
Tumblr	2%	2% C	3% C	0%
Kick	2%	2%	1%	1%
BeReal	1%	0%	2%	1%
None of these	4%	9% BC	1%	2%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

U2b. Which of these does your child(ren) use on a regular basis?

The perceived risk associated with social media platforms is higher among parents with young children

SOCIAL MEDIA PLATFORMS – PERCEIVED RISK (VERY HIGH / HIGH RISK)

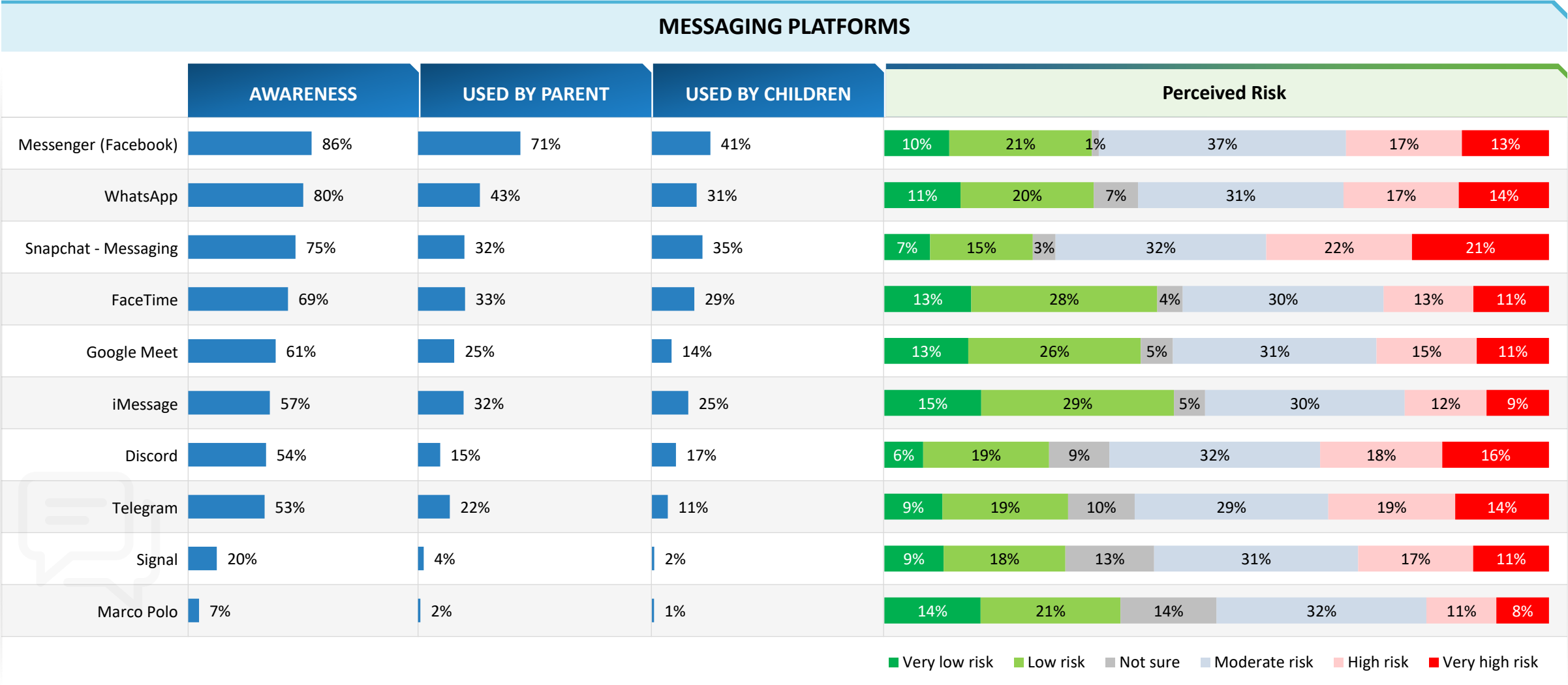
		AGES OF CHILDREN IN THE HOUSEHOLD			
		TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Snapchat	47%	53% B	42%	46%	
TikTok	46%	51% B	42%	45%	
Kick	43%	46%	47%	30%	
X (Twitter)	41%	49% BC	34%	39%	
Instagram	40%	47% BC	39%	33%	
Facebook	39%	49% BC	33%	37%	
Tumblr	31%	35%	25%	31%	
Reddit	30%	37% BC	25%	27%	
Twitch	28%	32%	27%	27%	
BeReal	26%	41% C	24%	*	
YouTube	25%	30% BC	23%	22%	
Threads	24%	27%	23%	23%	
Lemon8	24%	32% C	21%	16%	
Pinterest	14%	16% C	15% C	8%	

Base (Those aware of social media platforms): Base (min-max): Total – (105-958), Age of Child: 12 or under – (32-341), Both 6-12 years and 13-17 years – (46-344), 13 or above – (*27-278)
 U3. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Letters in BLUE indicates significant difference at 95% confidence level

* Indicates low base less than 30

Snapshot: Messaging Platforms



Base: Total - 1014, Awareness: Messenger (Facebook) - 871, WhatsApp - 812, Snapchat - 757, FaceTime - 704, Google Meet - 617, iMessage - 576, Discord - 549, Telegram - 539, Signal - 202, Marco Polo - 76
U4. Which of the following messaging, communications, or chat platforms have you heard of before today?, U5a. Which of these do you, personally, use on a regular basis?, U5b. Which of these does your child(ren) use on a regular basis?, U6. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Messaging platform use increases as the age of the kids increases

MESSAGING PLATFORMS – USED BY CHILDREN

AGES OF CHILDREN IN THE HOUSEHOLD

	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Messenger (Facebook)	41%	28%	47% A	48% A
Snapchat - Messaging	35%	22%	39% A	46% A
WhatsApp	31%	25%	46% AC	20%
FaceTime	29%	28%	27%	34% B
iMessage	25%	21%	30% A	24%
Discord	17%	11%	21% A	19% A
Google Meet	14%	11%	21% AC	9%
Telegram	11%	12% C	15% C	5%
Signal	2%	2% C	2% C	0%
Marco Polo	1%	2%	2%	1%
None of these	14%	24% BC	8%	10%
Not sure	3%	2%	3%	3%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

USb. Which of these does your child(ren) use on a regular basis?

Risk of using messaging apps is perceived to be higher among parents with younger children

MESSAGING PLATFORMS – PERCEIVED RISK (VERY HIGH / HIGH RISK)

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Snapchat	43%	50% BC	37%	40%
Discord	34%	39%	34%	29%
Telegram	33%	36%	31%	33%
WhatsApp	31%	40% BC	26%	26%
Messenger (Facebook)	31%	38% BC	29%	23%
Signal	29%	37% C	27%	21%
Google Meet	26%	29% C	27%	20%
FaceTime	25%	30% C	26%	18%
iMessage	22%	26%	19%	19%
Marco Polo	18%	30%	*	*

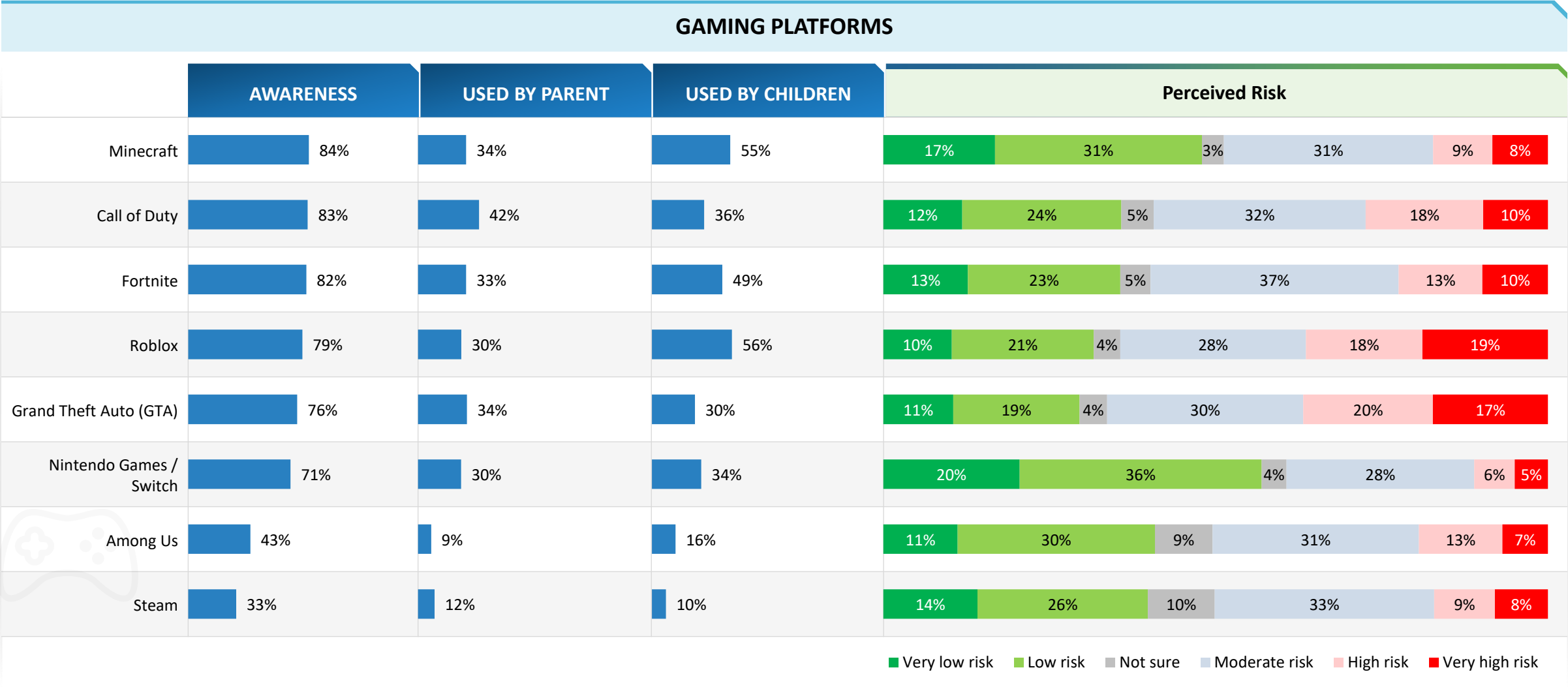
Letters in BLUE indicates significant difference at 95% confidence level

Base (Those aware of messaging platforms) (min-max): Total – (76-871), Age of Child: 12 or under – (30-302), Both 6-12 years and 13-17 years – (*25-303), 13 or above – (*21-266)

U6. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

* Indicates low base less than 30

Snapshot: Gaming Platforms



Base: Total - 1014, Awareness: Minecraft - 851, Call of Duty - 843, Fortnite - 833, Roblox - 805, Grand Theft Auto (GTA) - 769, Nintendo Games / Switch - 722, Among Us - 438, Steam - 339

U7. Which of the following gaming platforms or games have you heard of before today?, U8a. Which of these do you, personally, use on a regular basis?, U8b. Which of these does your child(ren) use on a regular basis?, U9. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Roblox is used at similar levels regardless of the age of the children, while Nintendo is more likely to be used by younger children; other gaming apps tend to increase with age

GAMING PLATFORMS – USED BY CHILDREN

		AGES OF CHILDREN IN THE HOUSEHOLD			
		TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
	Roblox	56%	54%	58%	55%
	Minecraft	55%	48%	64% AC	52%
	Fortnite	49%	38%	55% A	56% A
	Call of Duty	36%	27%	44% A	39% A
	Nintendo Games / Switch	34%	36% C	39% C	27%
	Grand Theft Auto (GTA)	30%	22%	33% A	35% A
	Among Us	16%	13%	20% A	16%
	Steam	10%	7%	13% A	10%
	None of these	5%	7% B	3%	5%

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293
U8b. Which of these does your child(ren) use on a regular basis?

Letters in **BLUE** indicates significant difference at 95% confidence level

Most of these gaming apps are perceived to be higher risk among parents with younger children

GAMING PLATFORMS – PERCEIVED RISK (VERY HIGH / HIGH RISK)

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Grand Theft Auto (GTA)	37%	41% C	39% C	29%
Roblox	36%	43% BC	33%	32%
Call of Duty	27%	35% BC	25%	22%
Fortnite	22%	25%	20%	22%
Among Us	19%	25% C	18%	13%
Minecraft	17%	21% C	17%	14%
Steam	17%	20%	18%	13%
Nintendo Games / Switch	11%	11%	12%	10%

Letters in BLUE indicates significant difference at 95% confidence level

Base (Those aware of gaming platforms) (min-max): Total – (339-851), Age of Child: 12 or under – (123-292), Both 6-12 years and 13-17 years – (130-306), 13 or above – (86-254)

U9. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Snapshot: Anonymous Chat and Friend Finding Apps

ANONYMOUS CHAT / FRIEND FINDING APPS

	AWARENESS	USED BY PARENT	USED BY CHILDREN	Perceived Risk					
Kik	29%	9%	6%	8%	16%	8%	24%	23%	20%
Whisper	17%	8%	7%	10%	21%	2%	33%	20%	13%
Monkey	15%	8%	7%	12%	20%	1%	28%	16%	22%
Yubo	15%	7%	6%	10%	28%	1%	28%	16%	16%
Wink	13%	7%	5%	9%	23%	6%	27%	23%	12%
OmeTV	12%	5%	5%	18%	22%	2%	30%	16%	12%
Wizz	11%	5%	4%	12%	19%	2%	32%	15%	19%
Tor / Onion Browser	11%	5%	3%	15%	14%	4%	21%	18%	28%
Emerald Chat	11%	5%	4%	12%	22%	2%	35%	17%	12%

Very low risk Low risk Not sure Moderate risk High risk Very high risk

Base: Total - 1014, Awareness: Kik - 290, Whisper - 176, Monkey - 152, Yubo - 148, Wink - 132, OmeTV - 123, Wizz - 113, Tor / Onion Browser - 111, Emerald Chat - 108
U10. Which of the following messaging apps have you heard of before today?, U11a. Which of these do you, personally, use on a regular basis?, U11b. Which of these does your child(ren) use on a regular basis?,
U12. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Anonymous chat and friend finding apps are more likely to be used in families with a range of ages

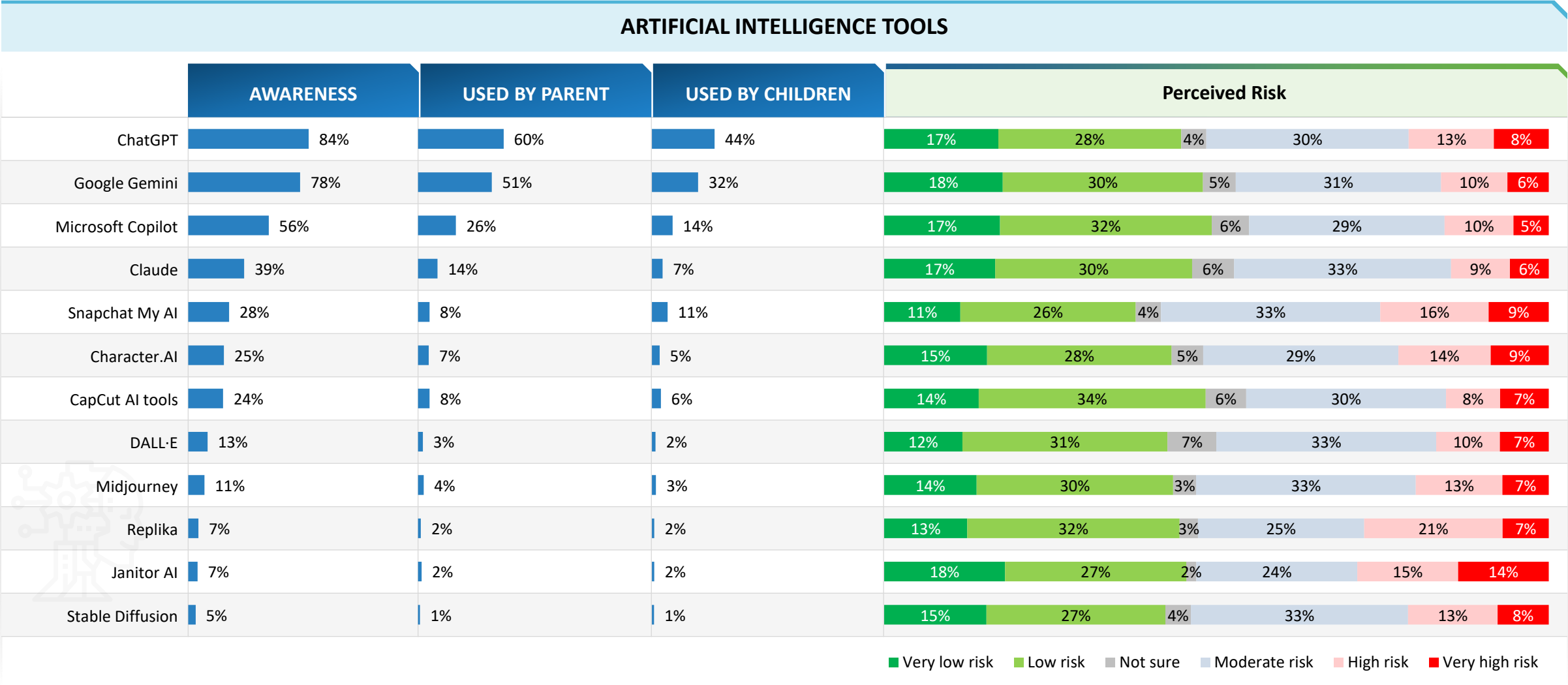
ANONYMOUS CHAT / FRIEND FINDING APPS – USED BY CHILDREN

		AGES OF CHILDREN IN THE HOUSEHOLD			
		TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Whisper	7%	6% C	12% AC	2%	
Monkey	7%	6%	9% C	4%	
Kik	6%	5%	7%	5%	
Yubo	6%	5% C	10% AC	1%	
Wink	5%	5% C	8% C	1%	
OmeTV	5%	5% C	8% C	1%	
Emerald Chat	4%	4% C	7% C	1%	
Wizz	4%	4% C	6% C	1%	
Tor / Onion Browser	3%	4%	3%	1%	
None of these	23%	27%	21%	20%	
Not sure	4%	4%	4%	6%	

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

U11b. Which of these does your child(ren) use on a regular basis?



Base: Total - 1014, Awareness: ChatGPT - 850, Google Gemini - 790, Microsoft Copilot - 568, Claude - 395, Snapchat My AI - 288, Character.AI - 252, CapCut AI tools - 246, DALL-E - 136, Midjourney - 115, Replika - 72, Janitor AI - 66, Stable Diffusion - 52
U13. Which of the following Artificial Intelligence (AI) tools have you heard of before today?, U14a. Which of these do you, personally, use on a regular basis?, U14b. Which of these does your child(ren) use on a regular basis?, U15. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Usage of common AI platforms is most common in households with a range of children's ages

ARTIFICIAL INTELLIGENCE TOOLS – USED BY CHILDREN

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
ChatGPT	44%	32%	59% AC	40% A
Google Gemini	32%	23%	45% AC	28%
Microsoft Copilot	14%	10%	19% A	14%
Snapchat My AI	11%	7%	14% A	12% A
Claude	7%	8%	8%	5%
CapCut AI tools	6%	5%	8%	5%
Character.AI	5%	5%	7% C	3%
Midjourney	3%	4%	3%	2%
DALL·E	2%	2%	3%	1%
Replika	2%	2%	2%	1%
Janitor AI	2%	2%	2%	0%
Stable Diffusion	1%	3% B	1%	1%
None of these	24%	39% BC	15%	17%
Not sure	9%	6%	6%	16% AB

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293

U14b. Which of these does your child(ren) use on a regular basis?

Perceived risk of AI platforms is similar regardless of the age of the children

ARTIFICIAL INTELLIGENCE TOOLS – PERCEIVED RISK (VERY HIGH / HIGH RISK)

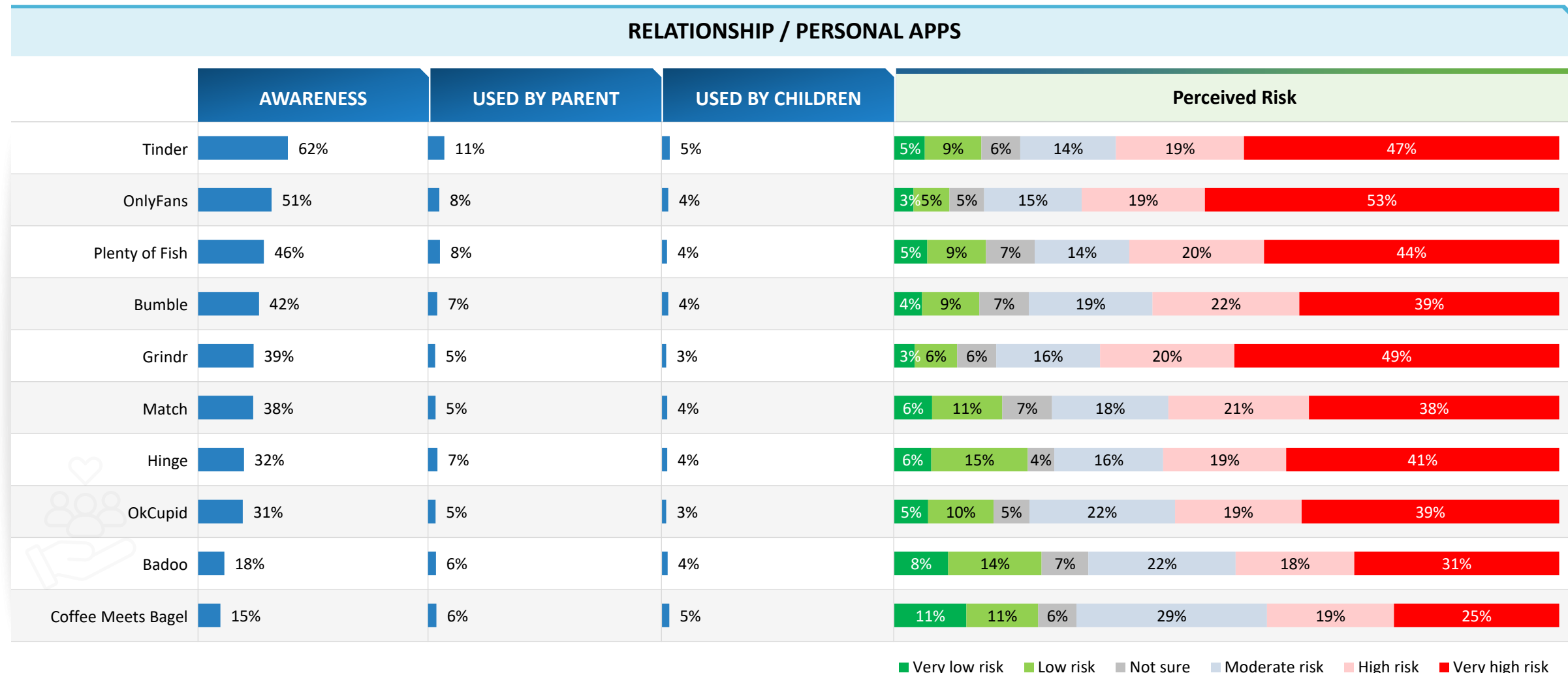
		AGES OF CHILDREN IN THE HOUSEHOLD			
		TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Janitor AI	29%		*	21%	*
Replika	28%		30%	23%	*
Snapchat My AI	25%		28%	23%	26%
Character.AI	23%		30%	18%	22%
Stable Diffusion	21%		*	*	*
ChatGPT	21%		22%	19%	22%
Midjourney	20%		27%	16%	*
DALL·E	17%		24%	13%	15%
Google Gemini	16%		19%	15%	14%
Microsoft Copilot	16%		18% C	19% C	10%
CapCut AI tools	15%		14%	17%	15%
Claude	15%		17%	14%	13%

Base (Those aware of artificial intelligence tools) (min-max): Total – (52-850), Age of Child: 12 or under – (*20-303), Both 6-12 years and 13-17 years – (*24-300), 13 or above – (*5-247)
 U15. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Letters in BLUE indicates significant difference at 95% confidence level

* Indicates low base less than 30

Snapshot: Relationship / Personal Apps



Base: Total - 1014, Awareness: Tinder - 633, OnlyFans - 518, Plenty of Fish - 464, Bumble - 430, Grindr - 391, Match - 388, Hinge - 324, OkCupid - 315, Badoo - 185, Coffee Meets Bagel - 157

U16. Which of the following relationship/ personal apps have you heard of before today?, U17a. Which of these do you, personally, use on a regular basis?, U17b. Which of these does your child(ren) use on a regular basis?,

U18. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Risk is perceived higher for younger children for most of these relationship / personal apps

RELATIONSHIP / PERSONAL APPS – PERCEIVED RISK (VERY HIGH / HIGH RISK)

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
OnlyFans	72%	76% B	62%	77% B
Grindr	69%	75% B	61%	71%
Tinder	67%	70% B	58%	72% B
Plenty of Fish	65%	70% B	58%	66%
Bumble	61%	66% B	54%	64%
Hinge	60%	67% B	44%	70% B
Match	59%	63%	55%	59%
OkCupid	58%	66% C	56%	50%
Badoo	49%	54%	44%	49%
Coffee Meets Bagel	44%	48%	35%	58% B

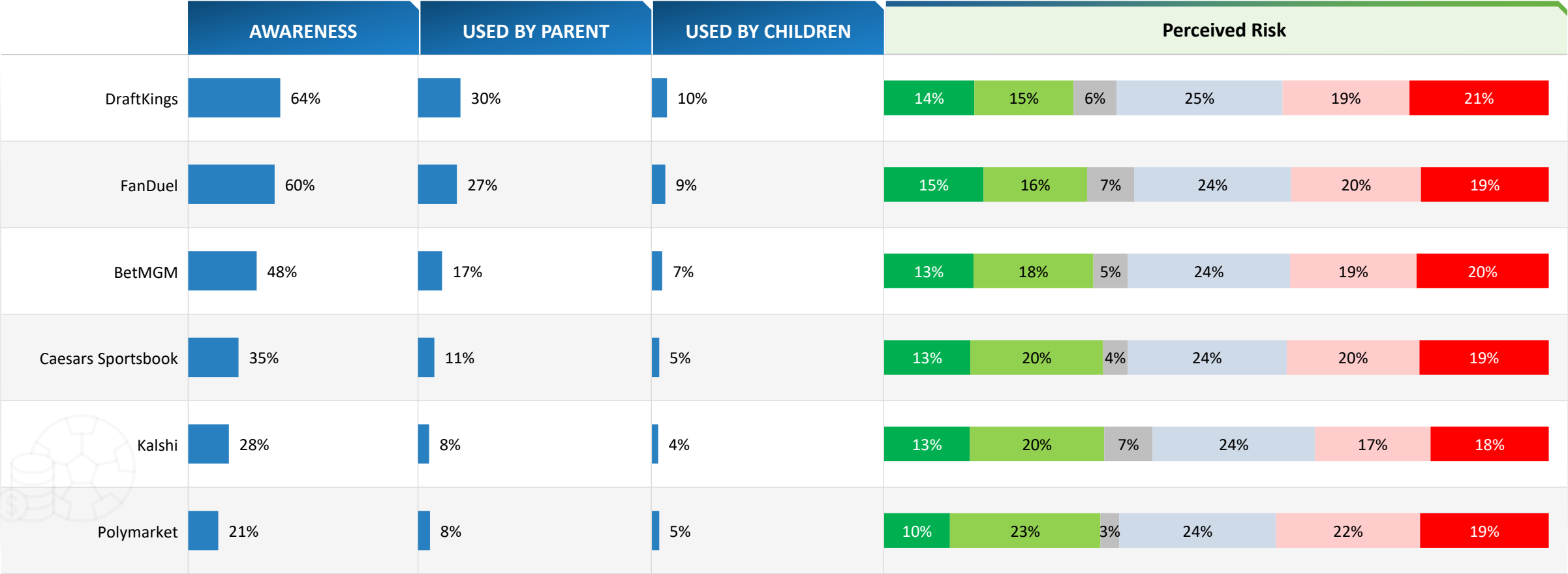
Letters in BLUE indicates significant difference at 95% confidence level

Base (Those aware of relationship / personal apps) (min-max): Total – (157-633), Age of Child: 12 or under – (54-225), Both 6-12 years and 13-17 years – (72-208), 13 or above – (31-200)

U18. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Snapshot: Betting, Prediction and Real Money Platforms

BETTING / PREDICTION / REAL MONEY PLATFORMS



Very low risk Low risk Not sure Moderate risk High risk Very high risk

Base: Total - 1014, Awareness: DraftKings - 649, FanDuel - 609, BetMGM - 483, Caesars Sportsbook - 355, Kalshi - 287, Polymarket - 212
U19. Which of the following betting/ prediction / real money platforms have you heard of before today?, U20a. Which of these do you, personally, use on a regular basis?, U20b. Which of these does your child(ren) use on a regular basis?,
U21. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Usage of these platforms is higher in households with a range of children's ages

BETTING / PREDICTION / REAL MONEY PLATFORMS – USED BY CHILDREN

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
DraftKings	10%	11% C	14% C	5%
FanDuel	9%	8%	14% AC	5%
BetMGM	7%	6% C	13% AC	2%
Caesars Sportsbook	5%	4%	8% AC	3%
Polymarket	5%	5% C	8% C	2%
Kalshi	4%	5%	5%	3%
None of these	54%	55% B	48%	59% B
Not sure	5%	3%	5%	6%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293
 U20b. Which of these does your child(ren) use on a regular basis?

Risk is perceived similarly regardless of children's age

BETTING / PREDICTION / REAL MONEY PLATFORMS – PERCEIVED RISK (VERY HIGH / HIGH RISK)

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Polymarket	41%	43%	37%	46%
DraftKings	40%	42%	38%	41%
Caesars Sportsbook	39%	43%	34%	43%
BetMGM	39%	44%	34%	40%
FanDuel	39%	40%	36%	40%
Kalshi	35%	37%	29%	40%

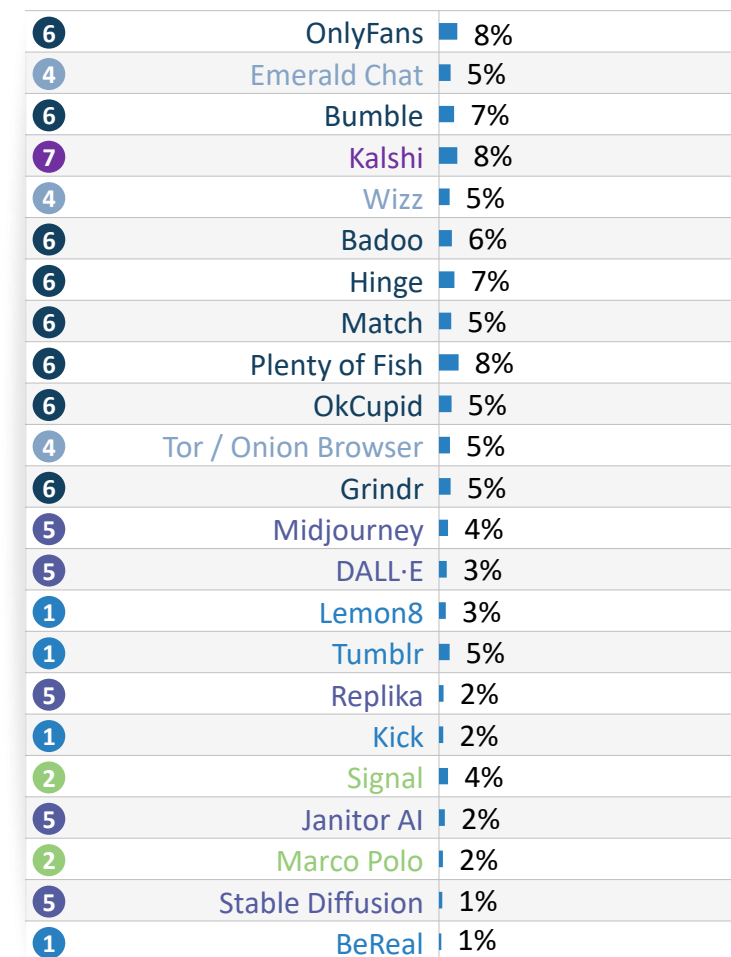
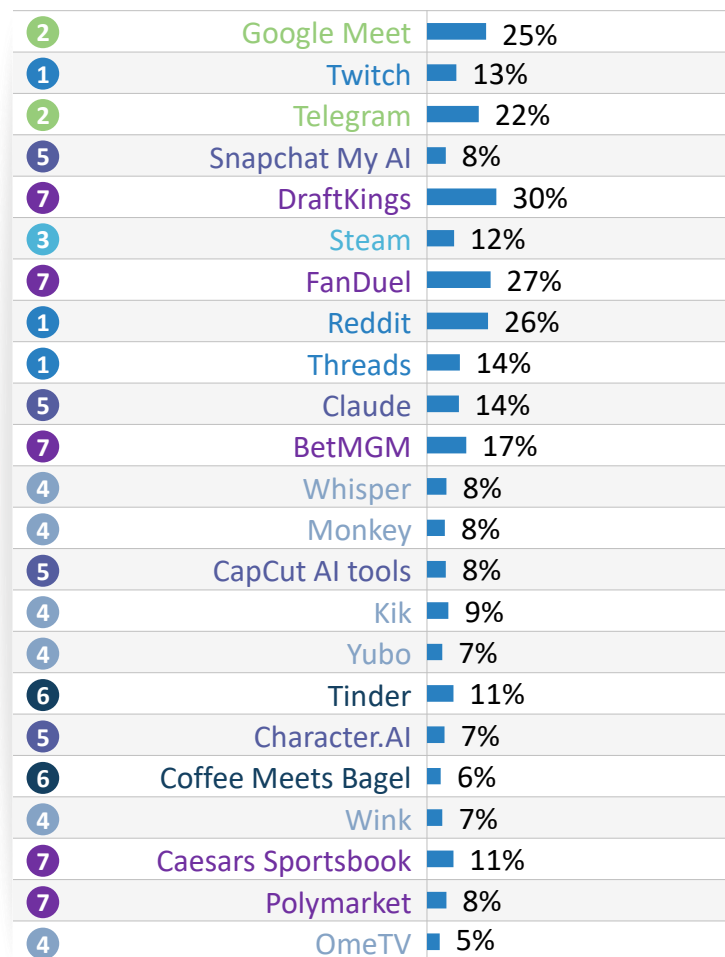
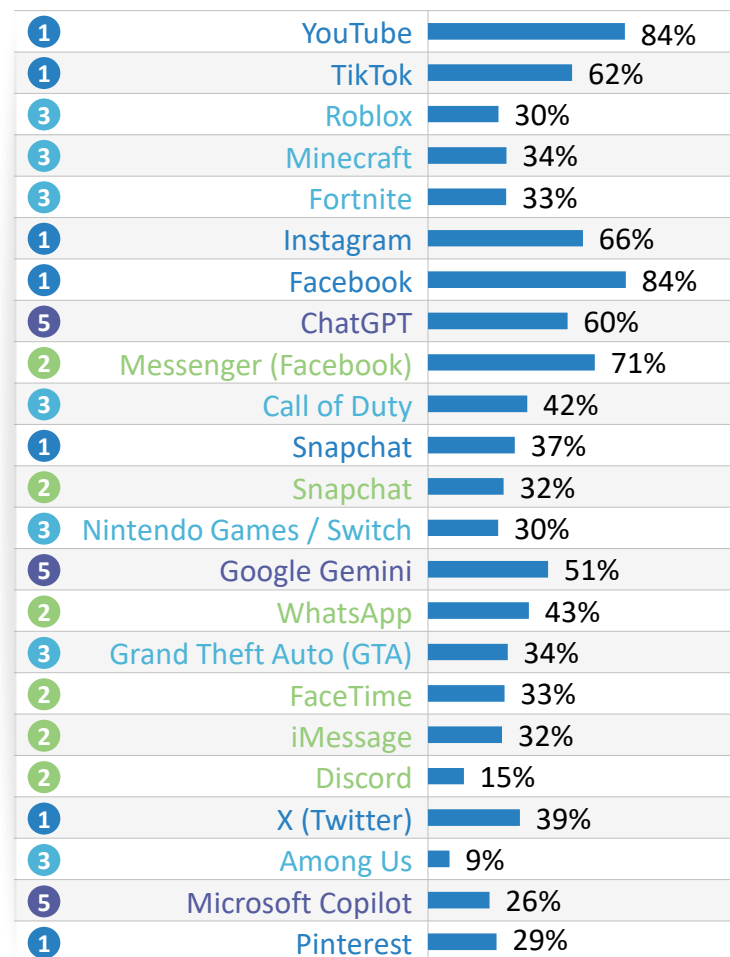
*Note: There is no significant difference among age groups at 95% confidence level

Base (Those aware of betting / prediction / real money platforms) (min-max): Total – (212-649), Age of Child: 12 or under – (76-228), Both 6-12 years and 13-17 years – (99-229), 13 or above – (37-196)

U21. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

Snapshot: App / Platform Usage - Parents

APPS / PLATFORMS USED BY PARENT



1 Social Media

2 Messaging

3 Gaming

4 Anonymous chat / Friend finding

5 Artificial Intelligence

6 Relationship / Personal

7 Betting / Prediction / Real Money

Base: Total - 1014

U2a – U20a. Which of these do you, personally, use on a regular basis?

Snapshot: App / Platform Usage - Children

APPS / PLATFORMS USED BY CHILDREN

1	YouTube	82%
1	TikTok	57%
3	Roblox	56%
3	Minecraft	55%
3	Fortnite	49%
1	Instagram	47%
1	Facebook	44%
5	ChatGPT	44%
2	Messenger (Facebook)	41%
3	Call of Duty	36%
1	Snapchat	36%
2	Snapchat	35%
3	Nintendo Games / Switch	34%
5	Google Gemini	32%
2	WhatsApp	31%
3	Grand Theft Auto (GTA)	30%
2	FaceTime	29%
2	iMessage	25%
2	Discord	17%
1	X (Twitter)	17%
3	Among Us	16%
5	Microsoft Copilot	14%
1	Pinterest	14%

2	Google Meet	14%
1	Twitch	12%
2	Telegram	11%
5	Snapchat My AI	11%
7	DraftKings	10%
3	Steam	10%
7	FanDuel	9%
1	Reddit	9%
1	Threads	8%
5	Claude	7%
7	BetMGM	7%
4	Whisper	7%
4	Monkey	7%
5	CapCut AI tools	6%
4	Kik	6%
4	Yubo	6%
6	Tinder	5%
5	Character.AI	5%
6	Coffee Meets Bagel	5%
4	Wink	5%
7	Caesars Sportsbook	5%
7	Polymarket	5%
4	OmeTV	5%

6	OnlyFans	4%
4	Emerald Chat	4%
6	Bumble	4%
7	Kalshi	4%
4	Wizz	4%
6	Badoo	4%
6	Hinge	4%
6	Match	4%
6	Plenty of Fish	4%
6	OkCupid	3%
4	Tor / Onion Browser	3%
6	Grindr	3%
5	Midjourney	3%
5	DALL-E	2%
1	Lemon8	2%
1	Tumblr	2%
5	Replika	2%
1	Kick	2%
2	Signal	2%
5	Janitor AI	2%
2	Marco Polo	1%
5	Stable Diffusion	1%
1	BeReal	1%

1 Social Media

2 Messaging

3 Gaming

4 Anonymous chat / Friend finding

5 Artificial Intelligence

6 Relationship / Personal

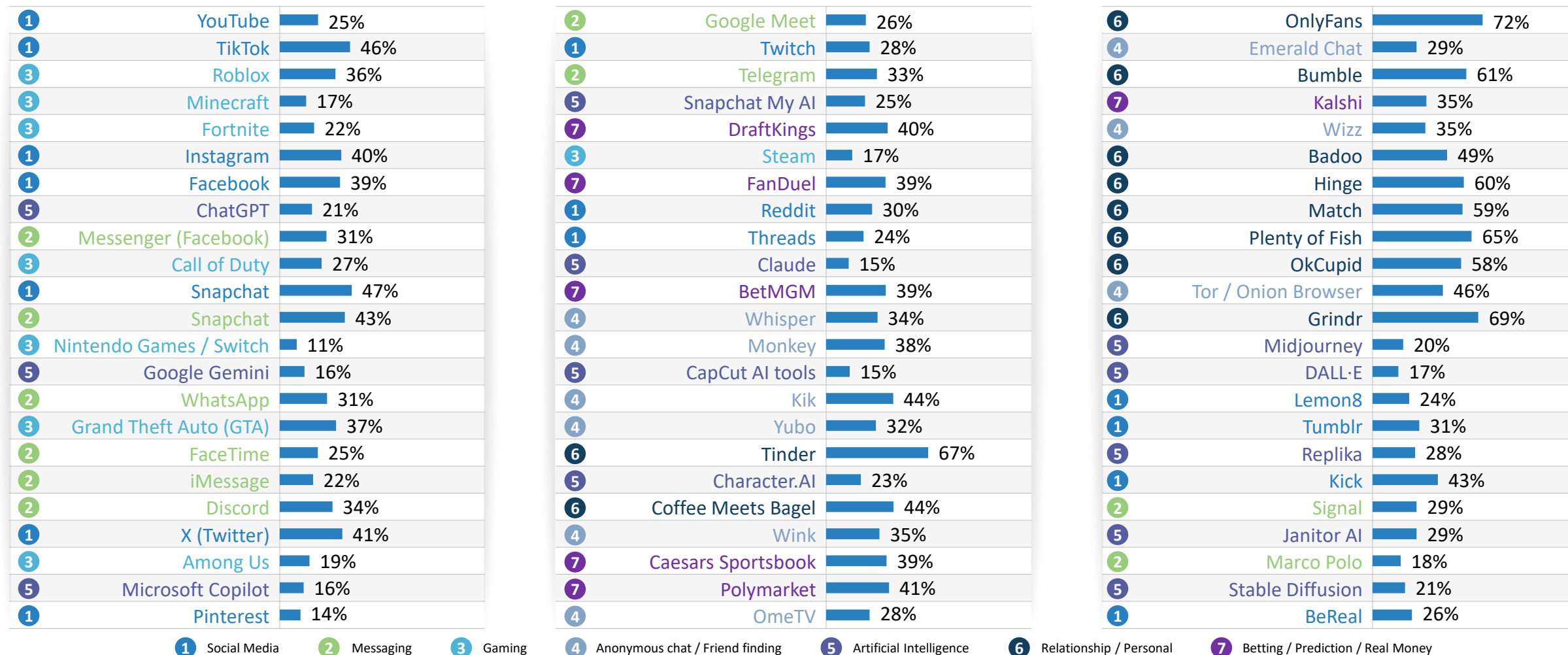
7 Betting / Prediction / Real Money

Base: Total - 1014

U2b – U20b. Which of these does your child(ren) use on a regular basis?

Snapshot: App / Platform Perceived Risk

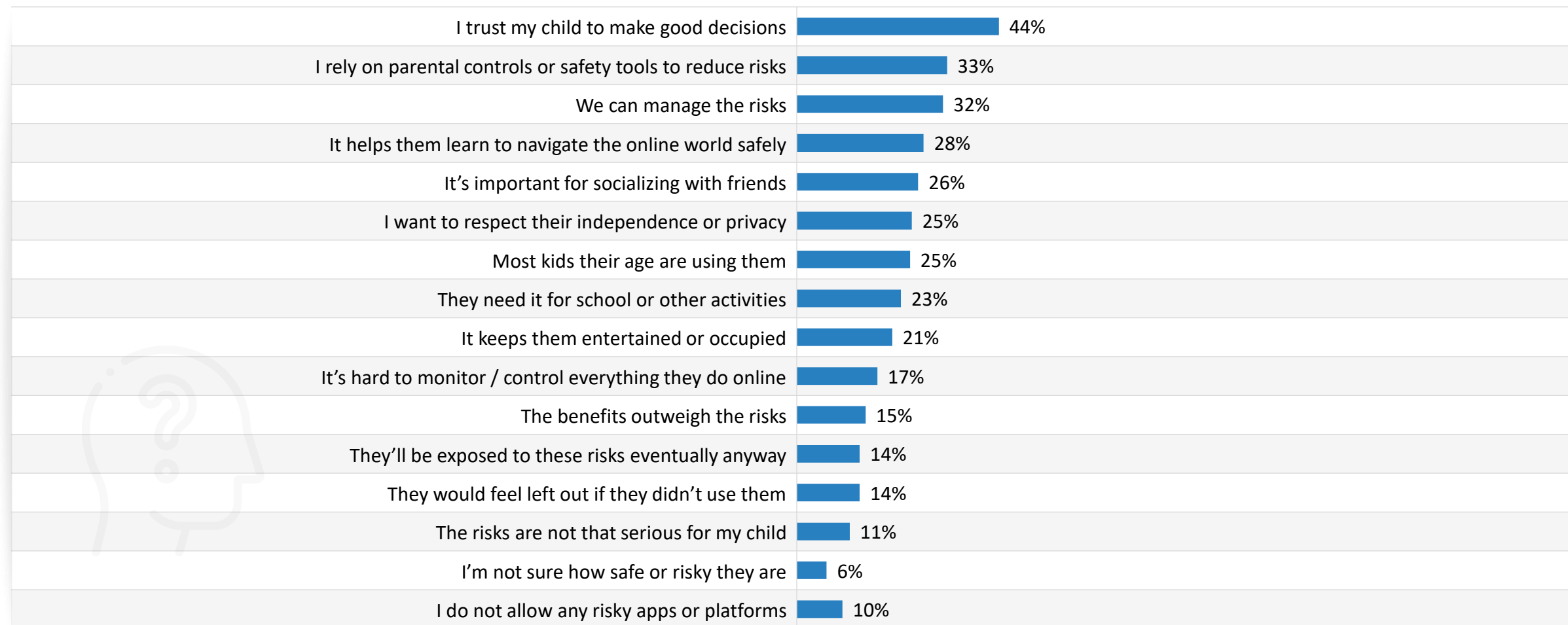
APPS / PLATFORMS – PERCEIVED RISK (VERY HIGH / HIGH RISK)



Base (Those aware of (min-max)): Social media platforms – (105-958), Messaging platforms – (76-871), Gaming platforms – (339-851), Anonymous chat / friend finding apps – (108-290), Artificial intelligence tools – (52-850), Relationship / personal apps – (157-633), Betting / prediction / real money platforms – (212-649)
 U3 – U21. When it comes to online safety for your child(ren), how risky do you consider each of the following platforms?

The main reason parents allow their kids to use risky apps or platforms is because they are trusting their child to make good decisions

REASONS FOR ALLOWING RISKY APP / PLATFORM USAGE



Base: Total - 1014

U22. What are the main reasons you allow your child(ren) to use apps or platforms that have some risk related to their online safety?

Half of parents with older kids allow the use of risky apps because they trust their child to make good decisions and parental controls play less of a role

REASONS FOR ALLOWING RISKY APP / PLATFORM USAGE

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
I trust my child to make good decisions	44%	30%	50% A	54% A
I rely on parental controls or safety tools to reduce risks	33%	35% C	35%	28%
We can manage the risks	32%	30%	35%	30%
It helps them learn to navigate the online world safely	28%	25%	31%	27%
It’s important for socializing with friends	26%	21%	33% AC	26%
I want to respect their independence or privacy	25%	19%	26% A	30% A
Most kids their age are using them	25%	21%	32% AC	20%
They need it for school or other activities	23%	16%	25% A	27% A
It keeps them entertained or occupied	21%	21%	25% C	15%
It’s hard to monitor / control everything they do online	17%	17%	17%	19%
The benefits outweigh the risks	15%	14%	18% C	12%
They’ll be exposed to these risks eventually anyway	14%	13%	14%	14%
They would feel left out if they didn’t use them	14%	12%	16%	12%
The risks are not that serious for my child	11%	9%	13%	12%
I’m not sure how safe or risky they are	6%	6%	6%	7%
I do not allow any risky apps or platforms	10%	13% B	7%	10%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293

U22. What are the main reasons you allow your child(ren) to use apps or platforms that have some risk related to their online safety?

Perceived Risk



SUMMARY: PERCEIVED RISK

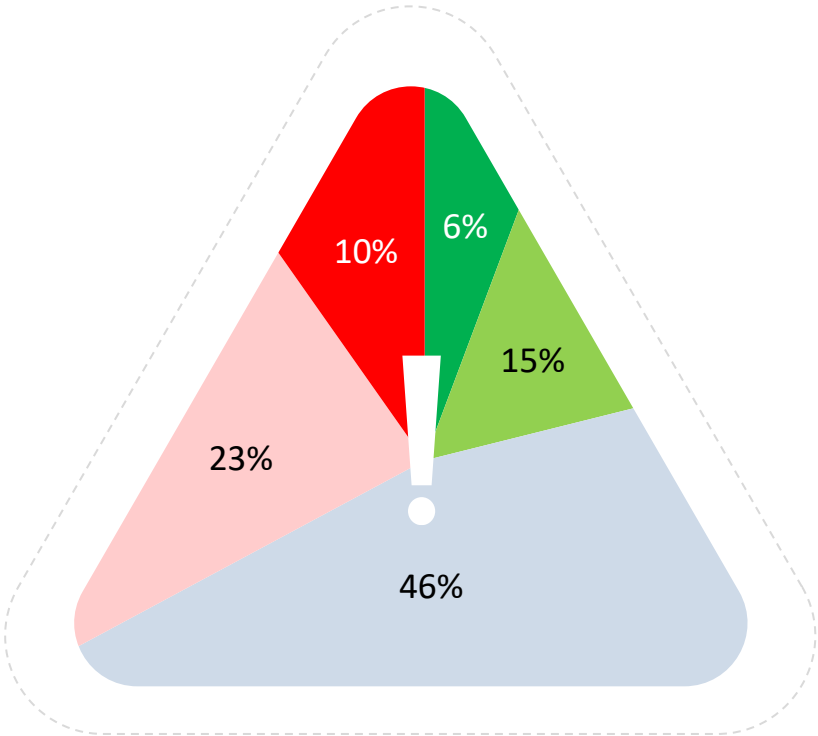
Online risk is seen as pervasive rather than exceptional: about one-third perceive high/very high risk and nearly half moderate risk, meaning roughly eight in ten see children as facing at least a moderate degree of online risk.

Sexual exploitation and sexual content dominate parents' unaided risk perceptions. These concerns emerge ahead of harassment/toxicity, harmful content, financial deception and privacy/security threats, showing how strongly "stranger danger" has carried into the digital environment.

Parents appear most attuned to immediate, tangible threats to the child—predators, sexual content, bullying and scams—rather than more diffuse harms. This suggests that online safety is primarily framed as protecting the child from people and harmful experiences rather than managing the broader digital information environment.

A third of the parents perceive a high or very high level of risk exposure when their children are online and nearly half say moderate risk

PERCEPTION OF ONLINE RISK LEVEL



Very High / High Risk

33%

Very low risk

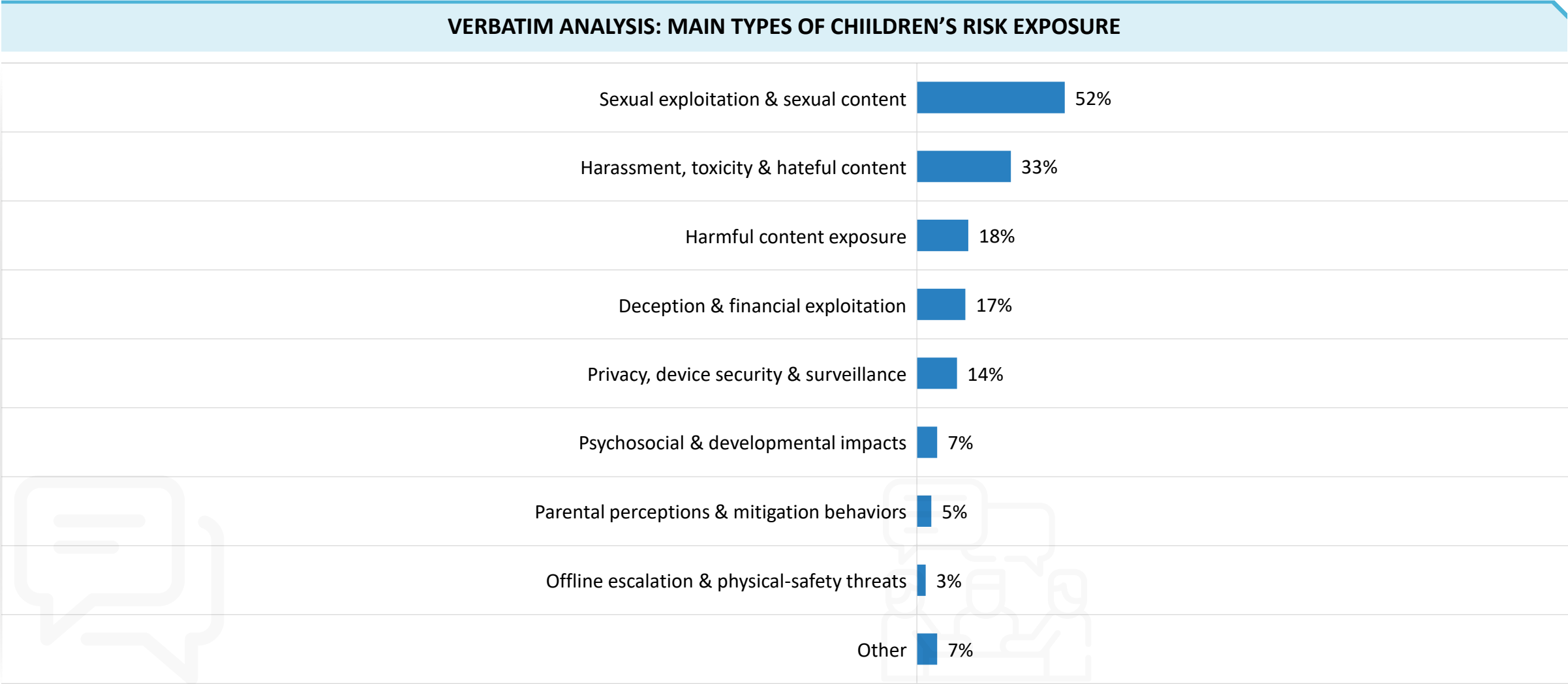
Low risk

Moderate risk

High risk

Very high risk

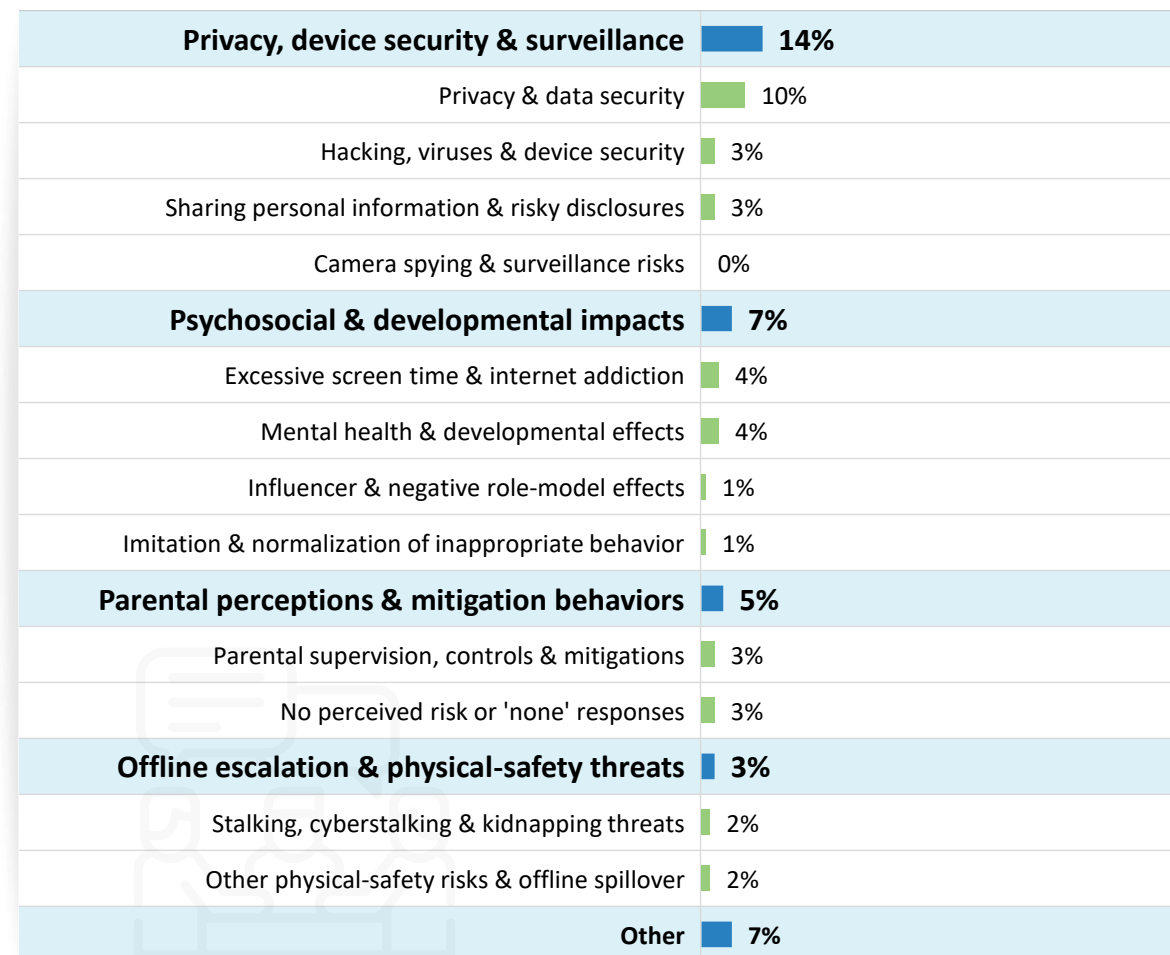
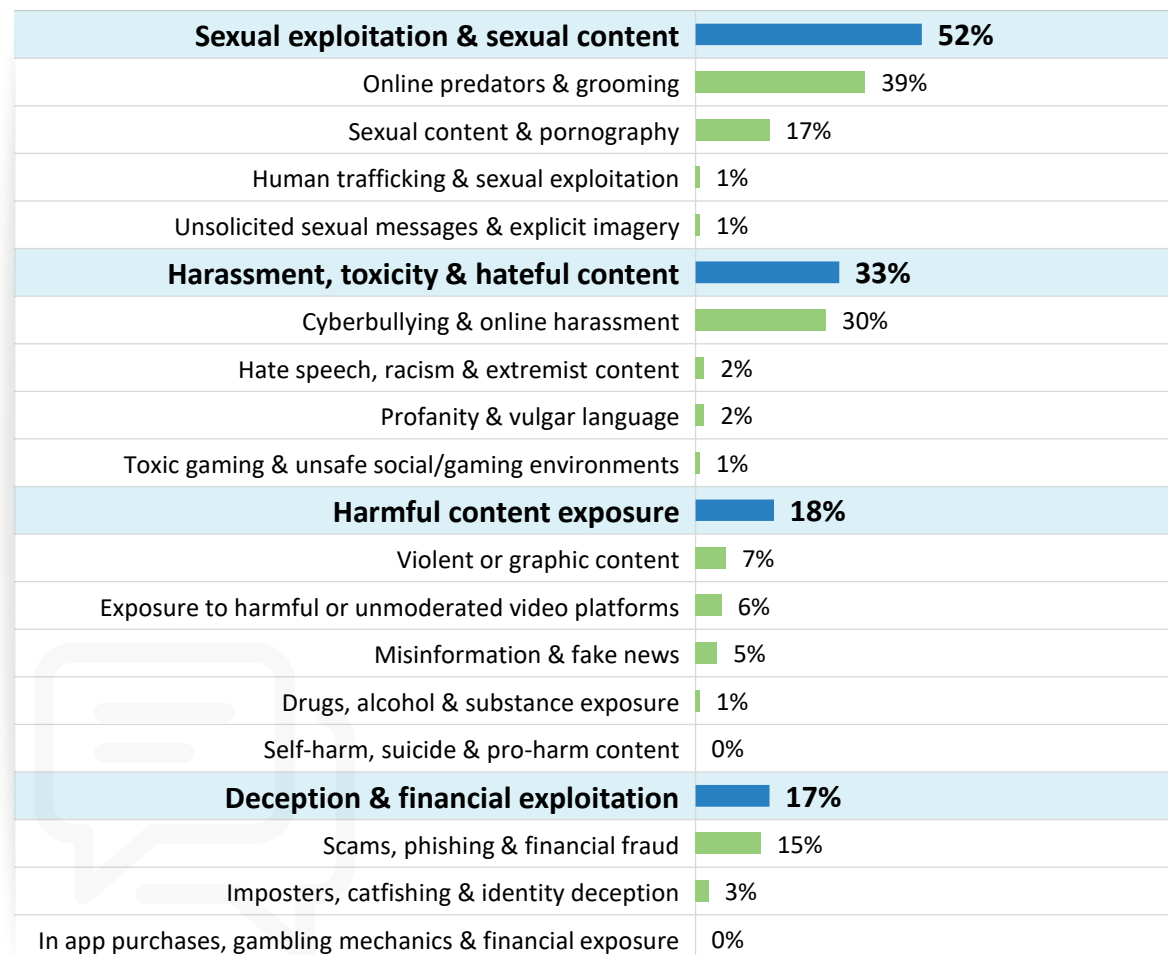
When asked what types of risk their kids could be exposed to, sexual exploitation and sexual content were mentioned by half of parents and a third mentioned harassment, toxicity or hateful content



Base: Total - 1014
T7. What type of risks do you think your child(ren) could be exposed to when online?

Verbatims fell into many topic areas underlying the main themes mentioned, especially online predators & grooming and cyberbullying & online harassment

AI VERBATIM ANALYSIS: CHILDREN'S RISK EXPOSURE



Base: Total - 1014

T7. What type of risks do you think your child(ren) could be exposed to when online?

TYPES OF CHILDREN’S RISK EXPOSURE

DESCRIPTIONS

QUOTES

Sexual Exploitation & Sexual Content 52% Stranger danger in digital spaces remains parents' primary fear, including worry about both predatory behavior and inappropriate material exposure. The prevalence of these concerns unprompted demonstrates how deeply the threat of sexual exploitation has penetrated parental consciousness about online safety. • “The risk of being befriended by a child predators” • “Pedophiles, sex trafficking, and adults pretending to be their age” • “All different kinds like people trying to kidnap them or make them get evolved in sexual content without them realizing it until its too late” • “One major risk is exposure to inappropriate content, including violence, sexual material, or harmful misinformation that isn't age-appropriate” • “Sexual harassment indecent exposure” • “Adult content and predators” • “Sexual harassment exploitation”	Harassment, Toxicity & Hateful Content 33% Concern about <i>cyberbullying and online harassment</i> specifically is almost as prominent as predator concerns and highlights that peer-to-peer harm is a major top-of-mind issue. This aligns with the survey goal of understanding what parents are most focused on for their families, as bullying represents a more common, everyday risk compared to predatory behavior. • “Children can be exposed to cyberbullying inappropriate content, and online scams” • “May face risks like cyberbullying.” • “Online bullying and hate speech” • “They are easily exposed to harmful online content, such as violence and vulgarity, which distorts their values.” • “I think my child could be exposed to constant risk, such as violent, hateful material, as well as they can harassment from strangers, and also their identity or personal details.” • “Can be exposed to explicit content, vulgarity, trolls and predators.”	Harmful Content Exposure 18% The relatively lower prominence of misinformation compared to sexual or bullying content suggests parents may be more focused on immediate safety threats than on information quality, though this still represents a meaningful aspect of parental awareness. • “Access to inappropriate or violent content” • “Age inappropriate content” • “Exposure to harmful content promoting gun violence, self-harm, and suicide on popular platforms such as TikTok and Roblox can trigger mental health issues.” • “Watching inappropriate things, unhealthy habits, risky ideas and more”	Deception & Financial Exploitation 17% This indicates that a significant minority of parents are thinking about their children's vulnerability to financial manipulation and deceptive practices online. The presence of this theme demonstrates that parents' risk awareness extends beyond content and harassment to include economic and identity-based threats. • “Scams and predators” • “Scams, bad people” • “Catfishing and scammed out of money.” • “Phishing” • “risk of being scammed and meeting of all kinds of bad friends” • “Falling for online scams involving fake sweepstakes and fake order schemes leads to irrational spending.” • “Clicking on illegal links or downloading pirated game plugins can lead to the theft of personal account information and household payment details, resulting in financial loss.”	Privacy, Device Security & Surveillance 14% Parents are also concerned about data protection and technical security. Privacy and data security, hacking, viruses, and device security and sharing personal information and risky disclosures were also noted. • “Data and security risks online phishing risks online predator risks” • “Theft of personal information or fraud” • “Hacking and privacy issues” • “Security about personal information” • “Breach of private information and address” • “Sharing personal information without understanding the risks”
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Base: Total - 1014
T7. What type of risks do you think your child(ren) could be exposed to when online?

DESCRIPTIONS OF TYPES OF CHILDREN’S RISK EXPOSURE

Sexual Exploitation & Sexual Content 52% Stranger danger in digital spaces remains parents' primary fear, including worry about both predatory behavior and inappropriate material exposure. The prevalence of these concerns unprompted demonstrates how deeply the threat of sexual exploitation has penetrated parental consciousness about online safety.	Harassment, Toxicity & Hateful Content 33% Concern about <i>cyberbullying and online harassment</i> specifically is almost as prominent as predator concerns and highlights that peer-to-peer harm is a major top-of-mind issue. This aligns with the survey goal of understanding what parents are most focused on for their families, as bullying represents a more common, everyday risk compared to predatory behavior.	Harmful Content Exposure 18% The relatively lower prominence of misinformation compared to sexual or bullying content suggests parents may be more focused on immediate safety threats than on information quality, though this still represents a meaningful aspect of parental awareness.	Deception & Financial Exploitation 17% This indicates that a significant minority of parents are thinking about their children's vulnerability to financial manipulation and deceptive practices online. The presence of this theme demonstrates that parents' risk awareness extends beyond content and harassment to include economic and identity-based threats.	Privacy, Device Security & Surveillance 14% Parents are also concerned about data protection and technical security. Privacy and data security, hacking, viruses, and device security and sharing personal information and risky disclosures were also noted.
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Base: Total - 1014
T7. What type of risks do you think your child(ren) could be exposed to when online?

Example Verbatims: Children's Risk Exposure

VERBATIM RESPONSES RELATED TO TYPES OF CHILDREN'S RISK EXPOSURE

Sexual Exploitation & Sexual Content



- "The risk of being befriended by a child predators"
- "Pedophiles, sex trafficking, and adults pretending to be their age"
- "All different kinds like people trying to kidnap them or make them get evolved in sexual content without them realizing it until its too late"
- "One major risk is exposure to inappropriate content, including violence, sexual material, or harmful misinformation that isn't age-appropriate"
- "Sexual harassment indecent exposure"
- "Adult content and predators"
- "Sexual harassment exploitation"

Harassment, Toxicity & Hateful Content



- "Children can be exposed to cyberbullying inappropriate content, and online scams"
- "May face risks like cyberbullying."
- "Online bullying and hate speech"
- "They are easily exposed to harmful online content, such as violence and vulgarity, which distorts their values."
- "I think my child could be exposed to constant risk, such as violent, hateful material, as well as they can harassment from strangers, and also their identity or personal details."
- "Can be exposed to explicit content, vulgarity, trolls and predators."

Harmful Content Exposure



- "Access to inappropriate or violent content"
- "Age inappropriate content"
- "Exposure to harmful content promoting gun violence, self-harm, and suicide on popular platforms such as TikTok and Roblox can trigger mental health issues."
- "Watching inappropriate things, unhealthy habits, risky ideas and more"

Deception & Financial Exploitation



- "Scams and predators"
- "Scams, bad people"
- "Catfishing and scammed out of money."
- "Phishing"
- "risk of being scammed and meeting of all kinds of bad friends"
- "Falling for online scams involving fake sweepstakes and fake order schemes leads to irrational spending."
- "Clicking on illegal links or downloading pirated game plugins can lead to the theft of personal account information and household payment details, resulting in financial loss."

Privacy, Device Security & Surveillance



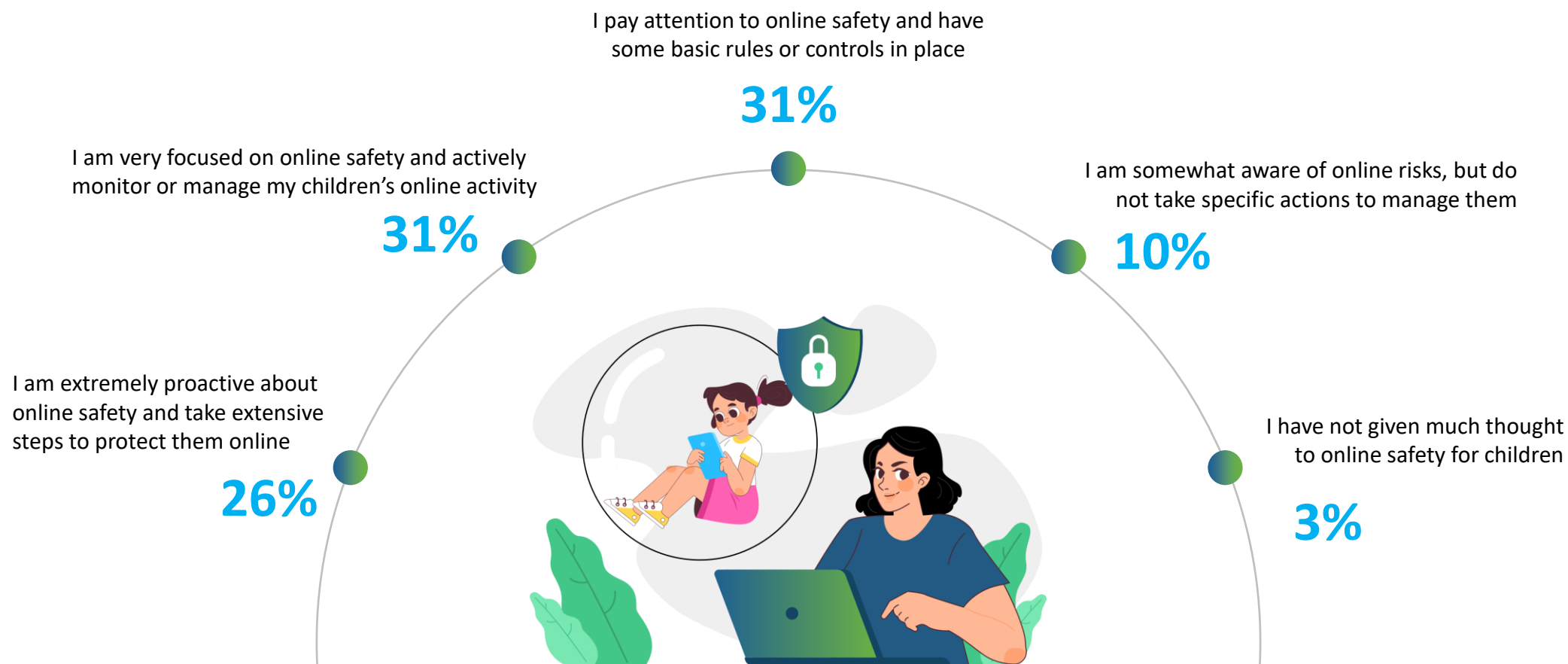
- "Data and security risks online phishing risks online predator risks"
- "Theft of personal information or fraud"
- "Hacking and privacy issues"
- "Security about personal information"
- "Breach of private information and address"
- "Sharing personal information without understanding the risks"

Base: Total - 1014

T7. What type of risks do you think your child(ren) could be exposed to when online?

The majority of parents pay attention to online safety and 1 in 4 say they are extremely proactive about managing it

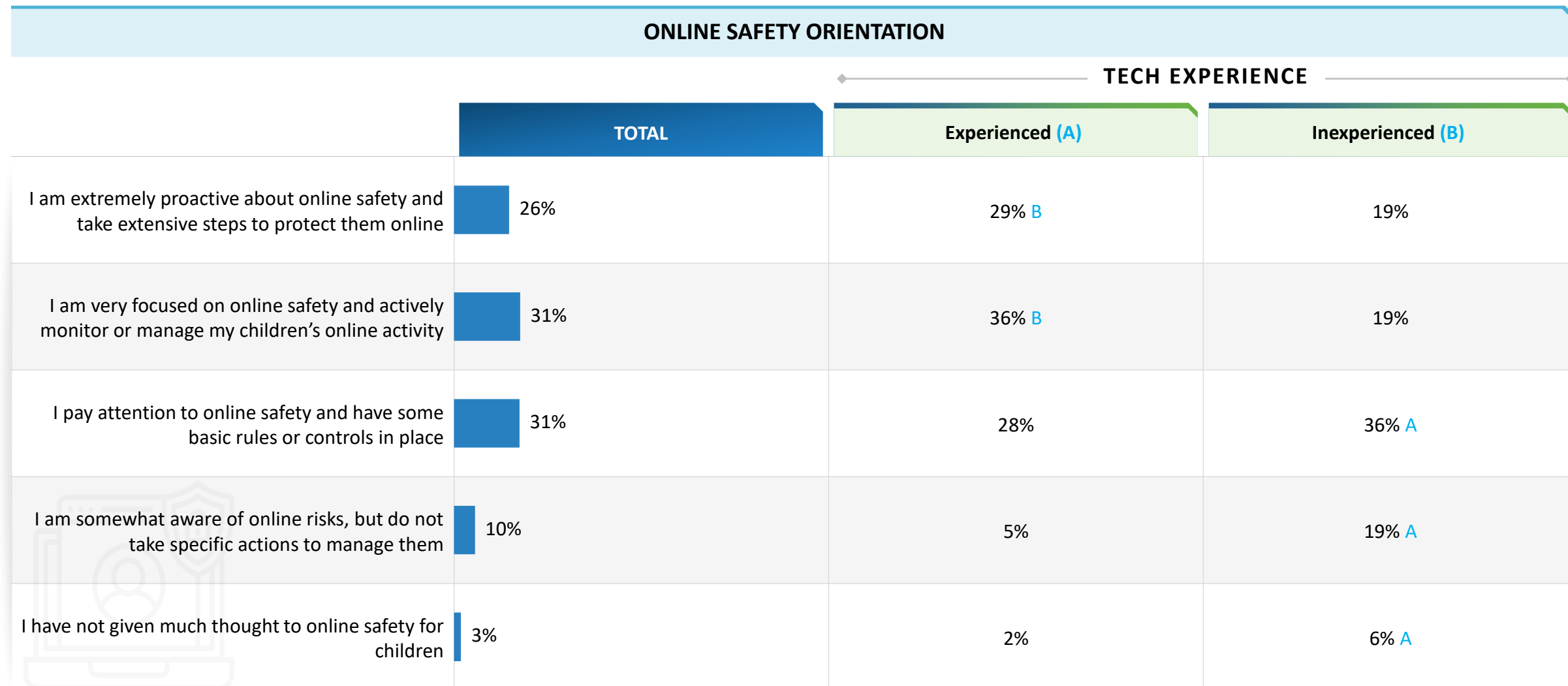
ONLINE SAFETY ORIENTATION



Base: Total - 1014

R1. Which of the following statements best reflects your views regarding online safety for your child(ren)?

Tech experience and a parent's focus on online safety are related – the more techy they are, the more proactive when protecting their kids online

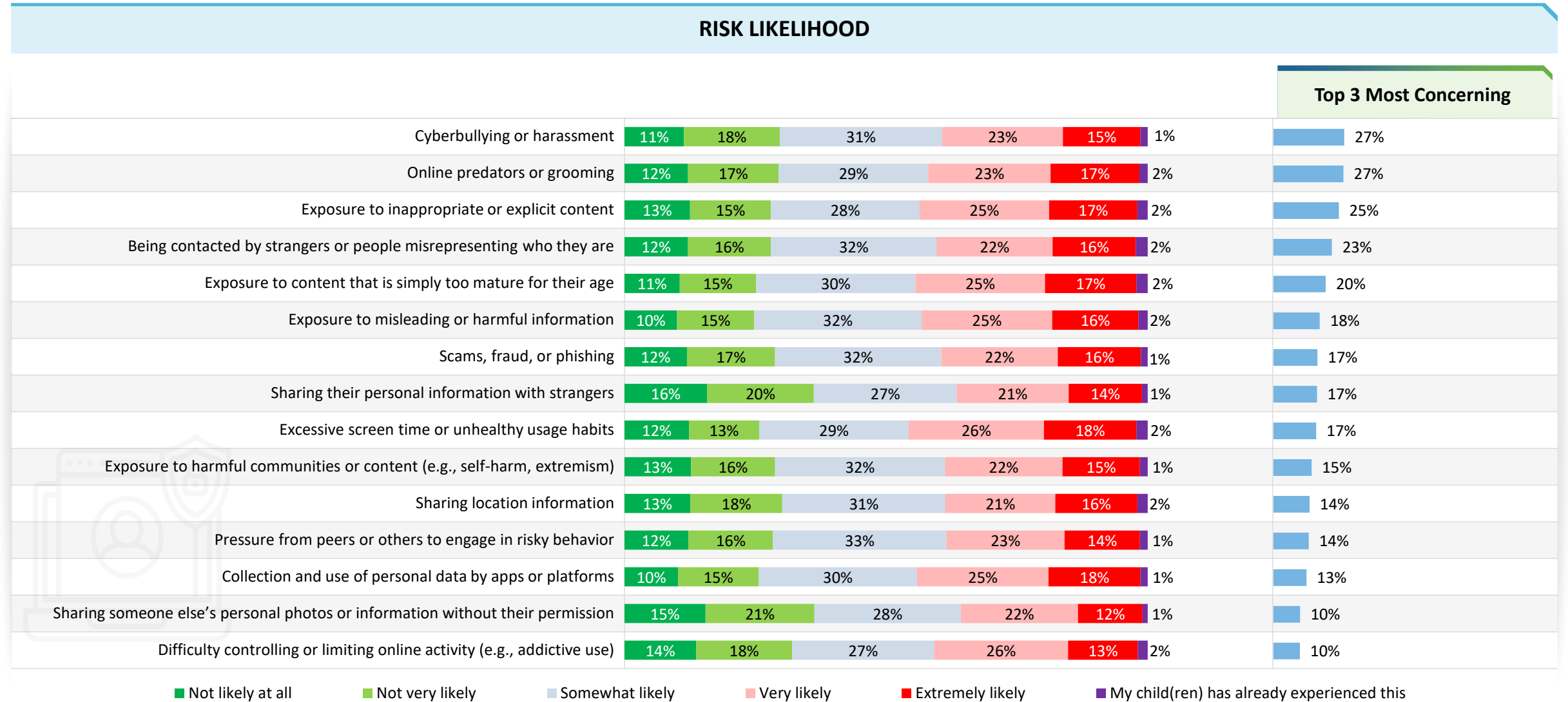


Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

R1. Which of the following statements best reflects your views regarding online safety for your child(ren)?

Letters in BLUE indicates significant difference at 95% confidence level

All of these risk areas are perceived to be likely by a third to half of these parents, who are most concerned about cyberbullying, online predators and inappropriate content



Base: Total - 1014

R3. How likely do you think each of the following is to happen to your child(ren) when they are online?, R4. Which of these are you most concerned about given your child(ren)'s current online usage?

The higher the overall perceived risk of online activities, the more likely parents are to believe these specific risks are likely to occur

RISK LIKELIHOOD (VERY / EXTREMELY LIKELY / CHILD HAS ALREADY EXPERIENCED)

	TOTAL	RISK PERCEPTIONS		
		High (A)	Moderate (B)	Low (C)
Excessive screen time or unhealthy usage habits	46%	66% BC	40% C	28%
Exposure to content that is simply too mature for their age	44%	65% BC	38% C	26%
Collection and use of personal data by apps or platforms	44%	66% BC	36% C	27%
Exposure to inappropriate or explicit content	44%	62% BC	37% C	29%
Exposure to misleading or harmful information	43%	64% BC	36% C	27%
Online predators or grooming	42%	65% BC	34% C	24%
Difficulty controlling or limiting online activity (e.g., addictive use)	41%	62% BC	33% C	24%
Being contacted by strangers or people misrepresenting who they are	40%	64% BC	32% C	21%
Scams, fraud, or phishing	39%	63% BC	30% C	23%
Cyberbullying or harassment	39%	61% BC	32% C	21%
Exposure to harmful communities or content (e.g., self-harm, extremism)	39%	61% BC	31% C	22%
Sharing location information	39%	61% BC	30%	24%
Pressure from peers or others to engage in risky behavior	38%	62% BC	30% C	21%
Sharing their personal information with strangers	36%	56% BC	29%	23%
Sharing someone else's personal photos or information without their permission	36%	57% BC	27% C	21%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Risk Perceptions: High - 333, Moderate - 467, Low - 214

R3. How likely do you think each of the following is to happen to your child(ren) when they are online?

The likelihood of these risks is higher for younger children

RISK LIKELIHOOD (VERY / EXTREMELY LIKELY / CHILD HAS ALREADY EXPERIENCED)

		AGES OF CHILDREN IN THE HOUSEHOLD		
	TOTAL	Younger Children Only (12 or under) (A)	Both 6 – 12 Years and 13 – 17 Years (B)	Older Children Only (13 or above) (C)
Excessive screen time or unhealthy usage habits	46%	49% C	46%	41%
Exposure to content that is simply too mature for their age	44%	47%	46%	40%
Collection and use of personal data by apps or platforms	44%	46%	47% C	39%
Exposure to inappropriate or explicit content	44%	47%	44%	40%
Exposure to misleading or harmful information	43%	48% C	43%	38%
Online predators or grooming	42%	45% C	43%	37%
Difficulty controlling or limiting online activity (e.g., addictive use)	41%	43%	42%	37%
Being contacted by strangers or people misrepresenting who they are	40%	41%	44% C	34%
Scams, fraud, or phishing	39%	41% C	43% C	33%
Cyberbullying or harassment	39%	45% C	40% C	31%
Exposure to harmful communities or content (e.g., self-harm, extremism)	39%	40%	41%	34%
Sharing location information	39%	41% C	42% C	31%
Pressure from peers or others to engage in risky behavior	38%	42% C	43% C	29%
Sharing their personal information with strangers	36%	38% C	39% C	31%
Sharing someone else’s personal photos or information without their permission	36%	38% C	39% C	29%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293

R3. How likely do you think each of the following is to happen to your child(ren) when they are online?



Managing Risk



SUMMARY: MANAGING RISK

Most parents believe they could take at least some action in a serious situation, but true preparedness is far from universal. Only 32% feel very prepared, and confidence is substantially lower among less tech-experienced parents.

Parental intervention generally makes children feel safer and cared for—but there is a meaningful countercurrent of resistance. Privacy concerns, annoyance and attempts to circumvent restrictions reinforce the need for approaches that preserve the parent-child relationship rather than rely solely on surveillance.

Risk management needs to evolve with the child. Scenario testing shows that parents appropriately react differently depending on age and type of threat—suggesting that effective safety approaches need to be adaptive rather than apply the same level of monitoring or intervention to every child and situation.

A third of parents feel very prepared to prevent or respond to a serious online risk

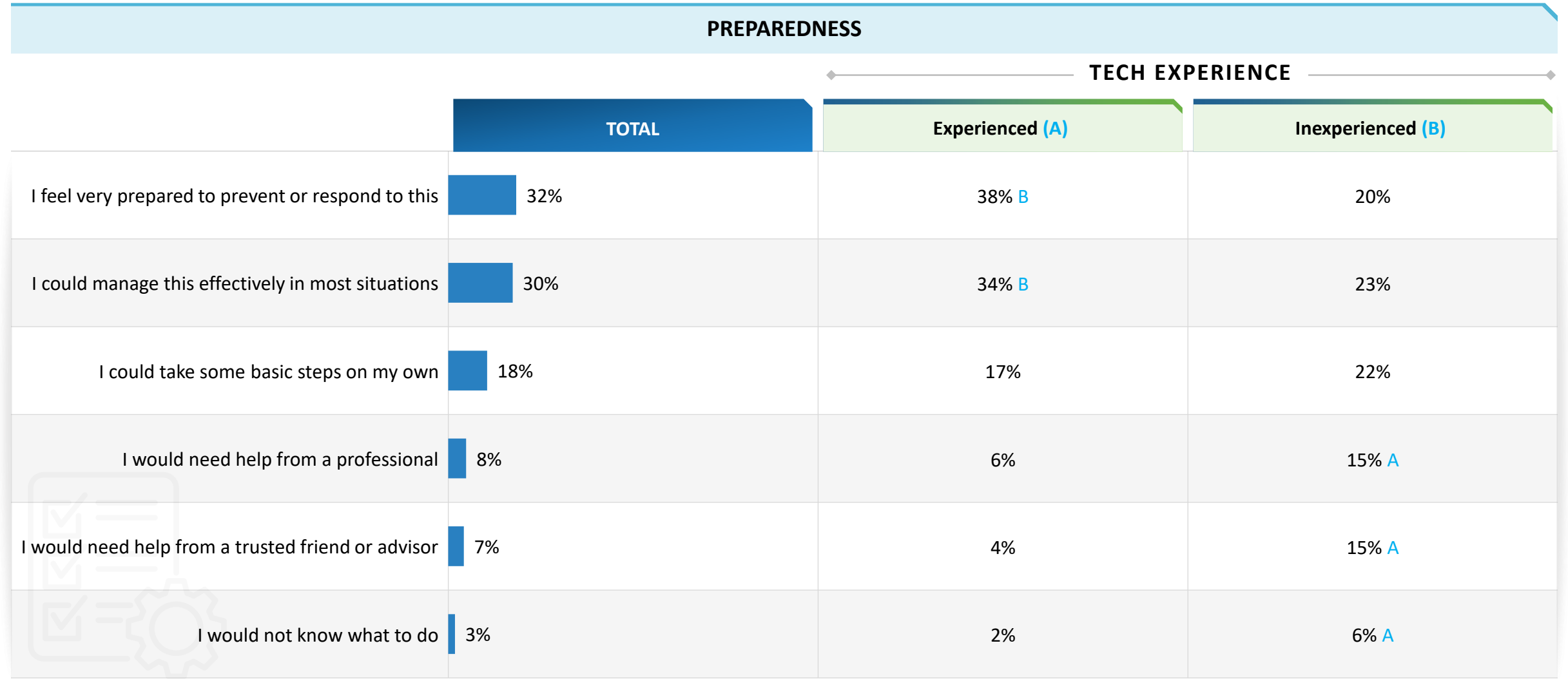
PREPAREDNESS



Base: Total - 1014

R5. Overall, how prepared do you feel to prevent or respond to a serious online risk if it happened to your child(ren)?

The more tech advanced the parent, the more confident they are in their ability to deal with a serious online risk

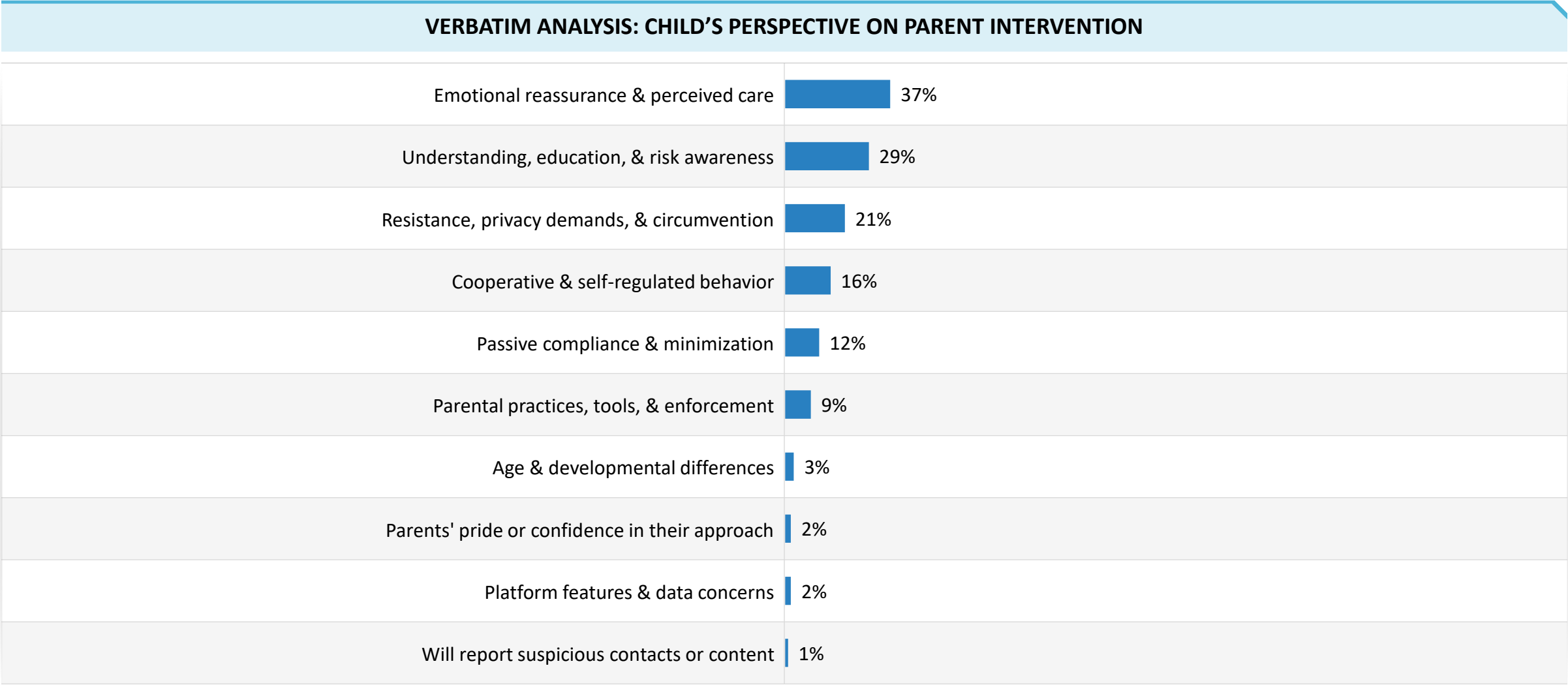


Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

R5. Overall, how prepared do you feel to prevent or respond to a serious online risk if it happened to your child(ren)?

Letters in BLUE indicates significant difference at 95% confidence level

Parents reported their child feeling reassured about their efforts to keep them safe online



Base: Total - 1014
R6. How does your child(ren) feel about efforts to keep them safe online?

Verbatim Analysis: Multiple sub-themes underlie each of these categories, with *feeling safe & supported, understanding the purpose of safety measures, and feeling annoyed or frustrated by restrictions* topping reactions among children to intervention

VERBATIM ANALYSIS: CHILD'S PERSPECTIVE ON PARENT INTERVENTION

Emotional reassurance & perceived care	37%
Positive/trusting feels safe & supported	26%
Mixed or ambivalent feelings	9%
Feels loved or cared for because of safety measures	7%
Understanding, education, & risk awareness	29%
Understands purpose of safety measures	21%
Understands specific online risks	7%
Parental education & open communication	6%
Resistance, privacy demands, & circumvention	21%
Annoyed or frustrated by restrictions	16%
Perceived intrusion & privacy concerns	4%
Desire for independence or more freedom	4%
Peer embarrassment or social friction	1%
Children want more privacy	1%
Attempts to circumvent restrictions	0%
Cooperative & self-regulated behavior	16%
Cooperative compliance / follows rules	10%
Child safety knowledge & self-monitoring	6%
Children have adapted over time	1%

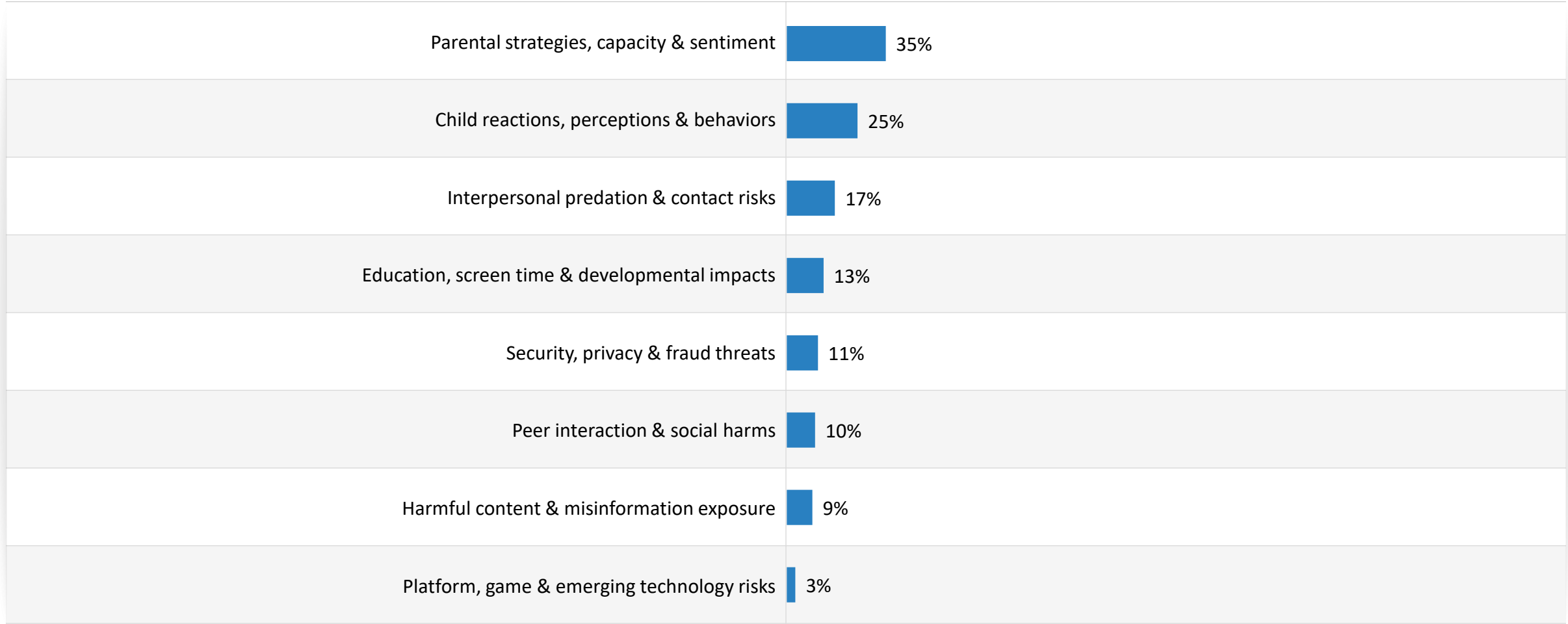
Passive compliance & minimization	12%
Indifferent or unconcerned	7%
Resigned acceptance (complies without enthusiasm)	3%
Acceptance because no choice	2%
Underestimates or downplays risks	1%
Parental practices, tools, & enforcement	9%
Parental monitoring & parental-control tools	7%
Enforcement & consequences	1%
In-person supervision & co-use	1%
Parental difficulty keeping up with technology	0%
Age & developmental differences	3%
Age-related differences in reaction	2%
Too young to understand	1%
Parents' pride or confidence in their approach	2%
Platform features & data concerns	2%
Platform or app specific mentions	1%
Desire for improved platform or feature-level safety	1%
Concern about platform data collection or practices	0%
Will report suspicious contacts or content	1%

Base: Total - 1014

R6. How does your child(ren) feel about efforts to keep them safe online?

When probed further about their children’s reactions, parents cited a number of topics impacting their perceptions

SMARTPROBE ANALYSIS: CHILD’S PERSPECTIVE ON PARENT INTERVENTION



Base: Total - 1014
R6. How does your child(ren) feel about efforts to keep them safe online?

Smart Probe Analysis: Sub-themes related to these categories are varied

SMARTPROBE ANALYSIS: CHILD'S PERSPECTIVE ON PARENT INTERVENTION

Parental strategies, capacity & sentiment	35%
Parental technical controls & monitoring	11%
Perceived effectiveness of safety measures	8%
Parental anxiety & worry	7%
Parent-child trust & surveillance	7%
Parental enforcement & consequences	5%
Monitoring burden & enforcement challenges	3%
Parents' technical knowledge & support needs	1%
Child reactions, perceptions & behaviors	25%
Child awareness & compliance	14%
Child resentment toward monitoring	4%
Child overconfidence & naivety	3%
Children's desire for privacy & independence	3%
Age differences in awareness & response	3%
Child indifferent or unconcerned	1%
Children circumvent controls & workarounds	1%
Barriers to disclosure & embarrassment	1%
Interpersonal predation & contact risks	17%
Online predators & grooming	14%
Fake identities & catfishing	3%
Risk of physical harm & abduction	2%

Education, screen time & developmental impacts	13%
Education & safety communication	10%
Screen time limits & addiction concerns	3%
Mental health & developmental concerns	1%
Security, privacy & fraud threats	11%
Scams, phishing & fraud	6%
Privacy & personal data exposure	6%
Hacking, malware & account security	1%
Peer interaction & social harms	10%
Cyberbullying & harassment	10%
Peer pressure & photo-sharing	1%
Harmful content & misinformation exposure	9%
Inappropriate sexual & adult content	7%
Exposure to violent or harmful content	3%
Misinformation & propaganda	1%
Platform, game & emerging technology risks	3%
Platform & game-specific risks	2%
Platform limitations & responsibility	1%
AI-related risks & manipulation	0%

Base: Total - 1014

R6. How does your child(ren) feel about efforts to keep them safe online?

The smart probe used in this research resulted in over half of verbatims providing more depth, while new topics were mentioned across several areas

VERBATIM RESPONSES BEFORE AND AFTER SMARTPROBE

VERBATIM THEMES BEFORE SMARTPROBE	
Emotional reassurance & perceived care	37%
Understanding, education, & risk awareness	30%
Resistance, privacy demands, & circumvention	21%
Cooperative & self-regulated behavior	16%
Passive compliance & minimization	12%
Parental practices, tools, & enforcement	9%
Age & developmental differences	3%
Parents' pride or confidence in their approach	2%
Platform features & data concerns	2%
Will report suspicious contacts or content	1%

VERBATIM THEMES AFTER SMARTPROBE	
Parental strategies, capacity & sentiment	35%
Child reactions, perceptions & behaviors	25%
Interpersonal predation & contact risks	17%
Education, screen time & developmental impacts	13%
Security, privacy & fraud threats	11%
Peer interaction & social harms	10%
Harmful content & misinformation exposure	9%
Platform, game & emerging technology risks	3%

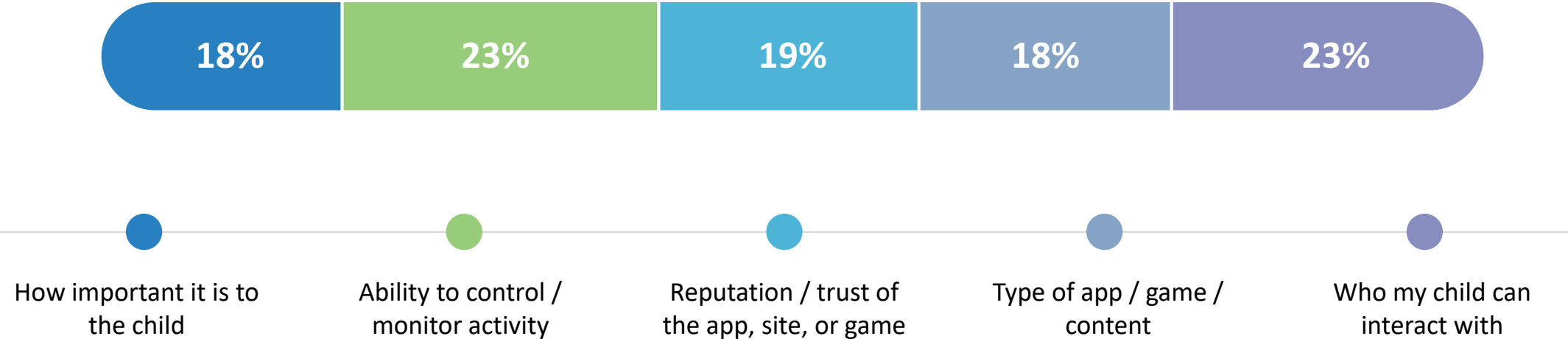
More Depth

New Insight Areas

Base: Total - 1014
R6. How does your child(ren) feel about efforts to keep them safe online?

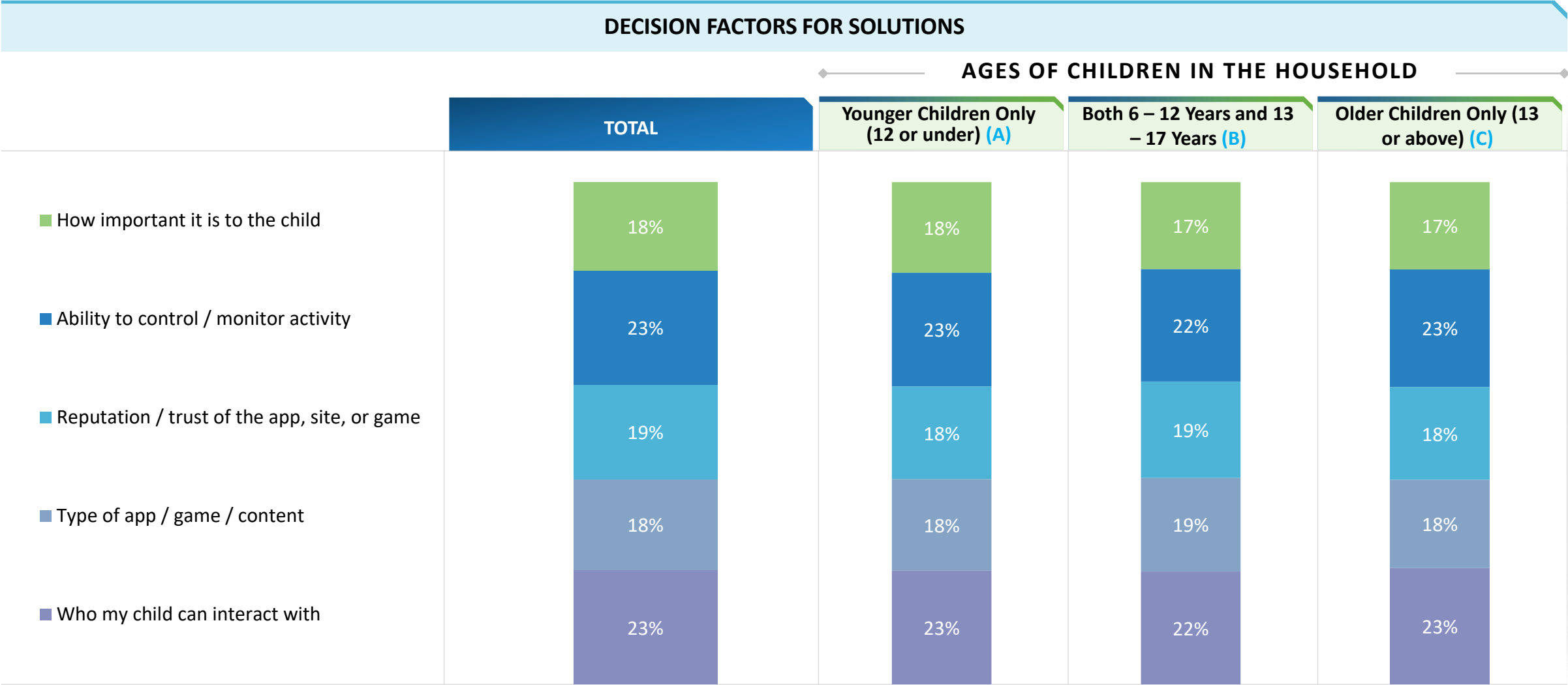
When deciding which apps or online activities their children can do, parents put more importance on their ability to control / monitor activity and who the app lets their child interact with

DECISION FACTORS FOR SOLUTIONS



Base: Total - 1014
R7. How important do you think each of the following factors are when it comes to choosing apps or other online activities used by children?

These factors are similarly important regardless of the age of the children in the household



*Note: There is no significant difference among age groups

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years – 356, 13 or above - 293
R7. How important do you think each of the following factors are when it comes to choosing apps or other online activities used by children?

Parents provided reactions to a series of potentially harmful online scenarios in this research

6-12 YEAR-OLD SCENARIOS

Scenario
01

The Secret Chat App



Your 11-year-old says their friend showed them an app where “parents can’t see the messages.” They want to download it to keep up with classmates. They say no one is sharing anything bad, its “just for fun” and all their friends are using it.

Scenario
02

Gaming Buddy Turns Weird



Your 10-year-old games online every day with someone from another city. Your child says they are “super nice” and just asked if they have a phone to chat privately

Scenario
03

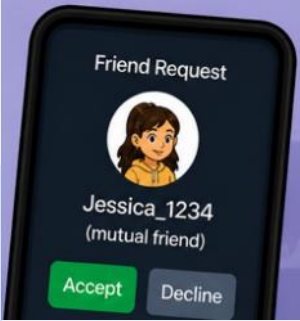
Group Chat Pressure



In a group chat with classmates, your 10-year-old is dared to send a silly or embarrassing picture—or risk being kicked out of the group.

Scenario
04

Fake Friend Request



Your 12-year-old gets a friend request from someone who seems to be a friend of a friend. They start chatting, but something feels off.

Scenario
05

Sharing Family's Private Photos



Your 7-year-old shares a silly bathroom photo of their older sibling with friends at school. They didn’t think it was a big deal, but the picture was more revealing and not something to be shared.

13-17 YEAR-OLD SCENARIOS

Scenario
06

Instagram Flirt → Pressure



Your 15-year-old is chatting with a follower who sends flirty messages and asks for “something spicy back.”

Scenario
07

Sextortion by Ex



After breaking up, your 16-year-old confides that their ex has a private photo and is threatening to share it unless they send more.

Scenario
08

Group Chat Turns Toxic



Your 14-year-old is in a class group chat where kids are pressuring each other to send “hot pics” or be rated. They’re feeling anxious and uncomfortable but want to stay in the group.

Scenario
09

Catfished by a “Cute Senior”



Your 13-year-old is talking with someone who says they’re 17 and from a nearby school. They ask for a picture to “prove you’re real first.”

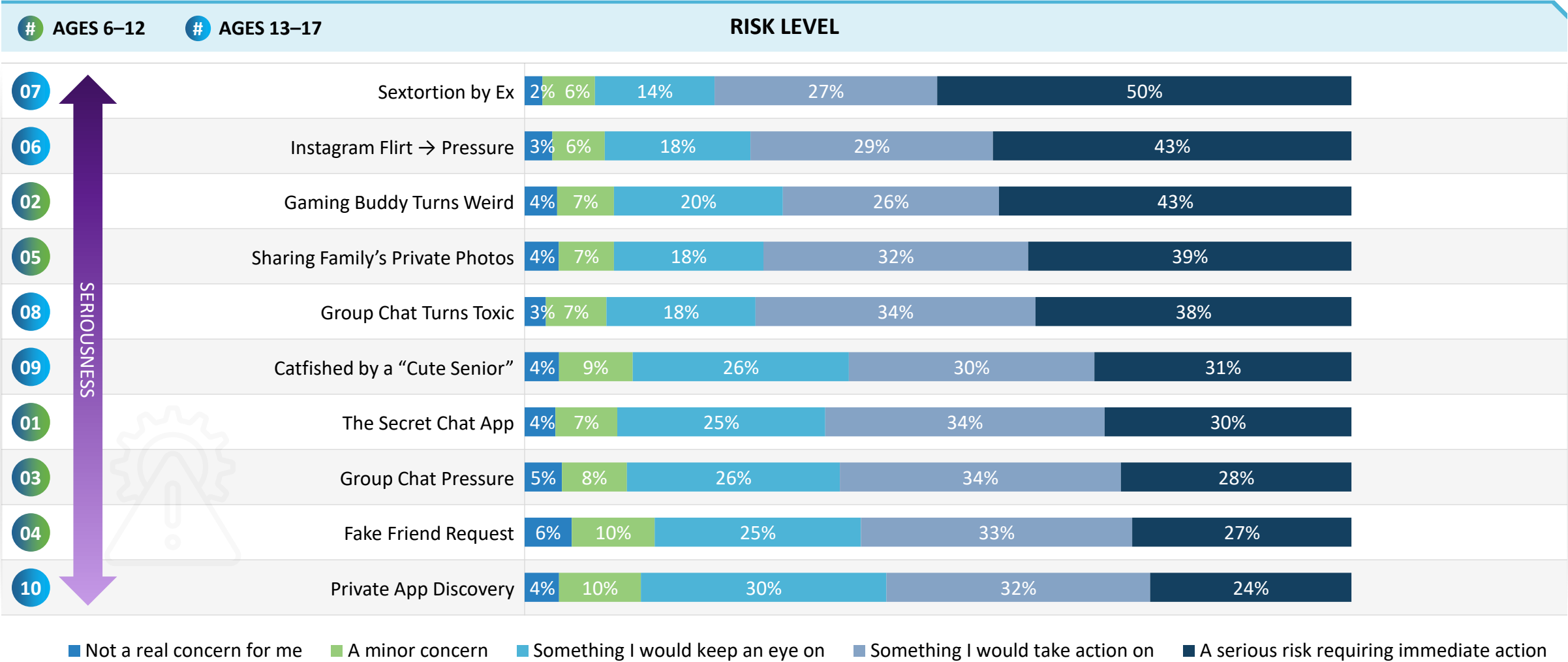
Scenario
10

Private App Discovery



You found out that your 17-year-old has a hidden app on their phone. When asked, they say “everyone in their school has one, it’s just private stuff. Parents wouldn’t get it”

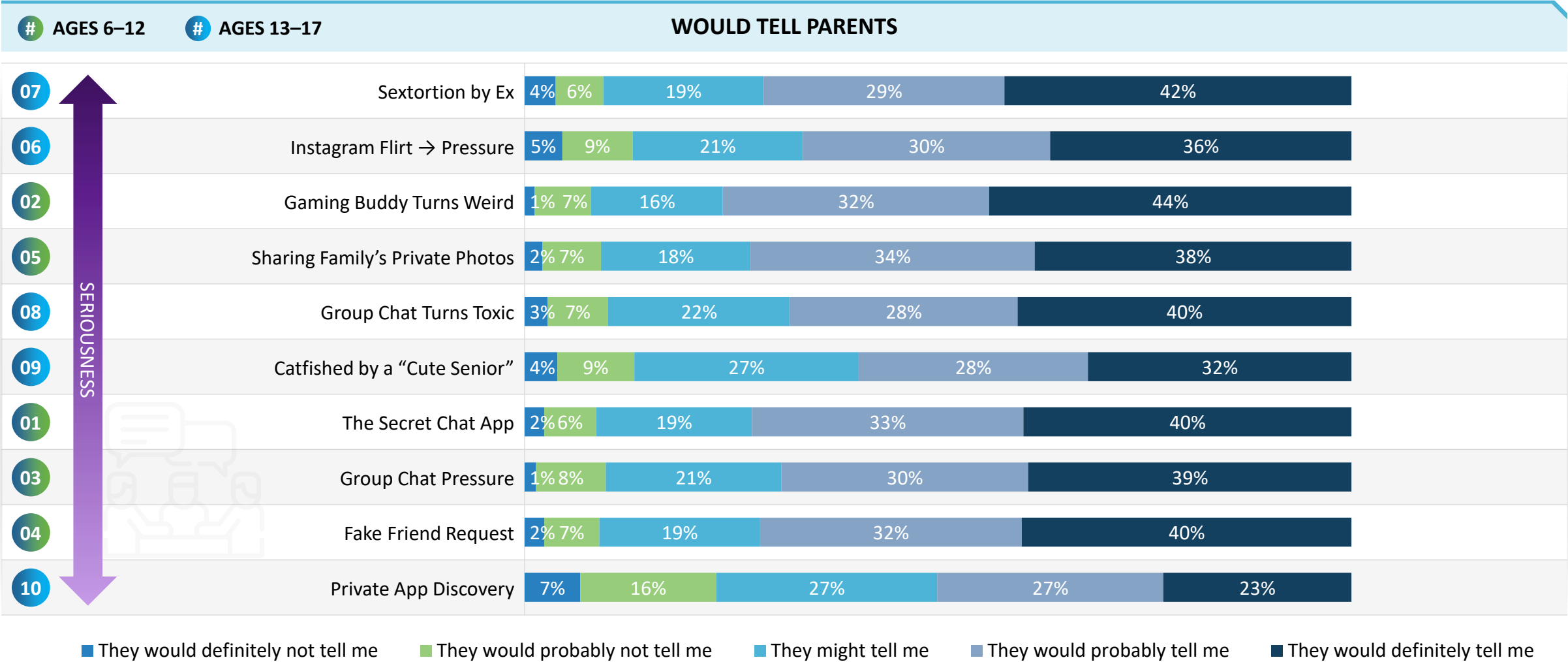
Private photo sharing is deemed most risky, included in several of the most risky scenarios, along with taking gaming chat offline



Base: Sextortion by Ex - 505, Instagram Flirt -> Pressure - 505, Gaming Buddy Turns Weird - 509, Sharing Family’s Private Photos - 509, Group Chat Turns Toxic - 505, Catfished by a “Cute Senior” - 505, The Secret Chat App - 509, Group Chat Pressure - 509, Fake Friend Request - 509, Private App Discovery - 505

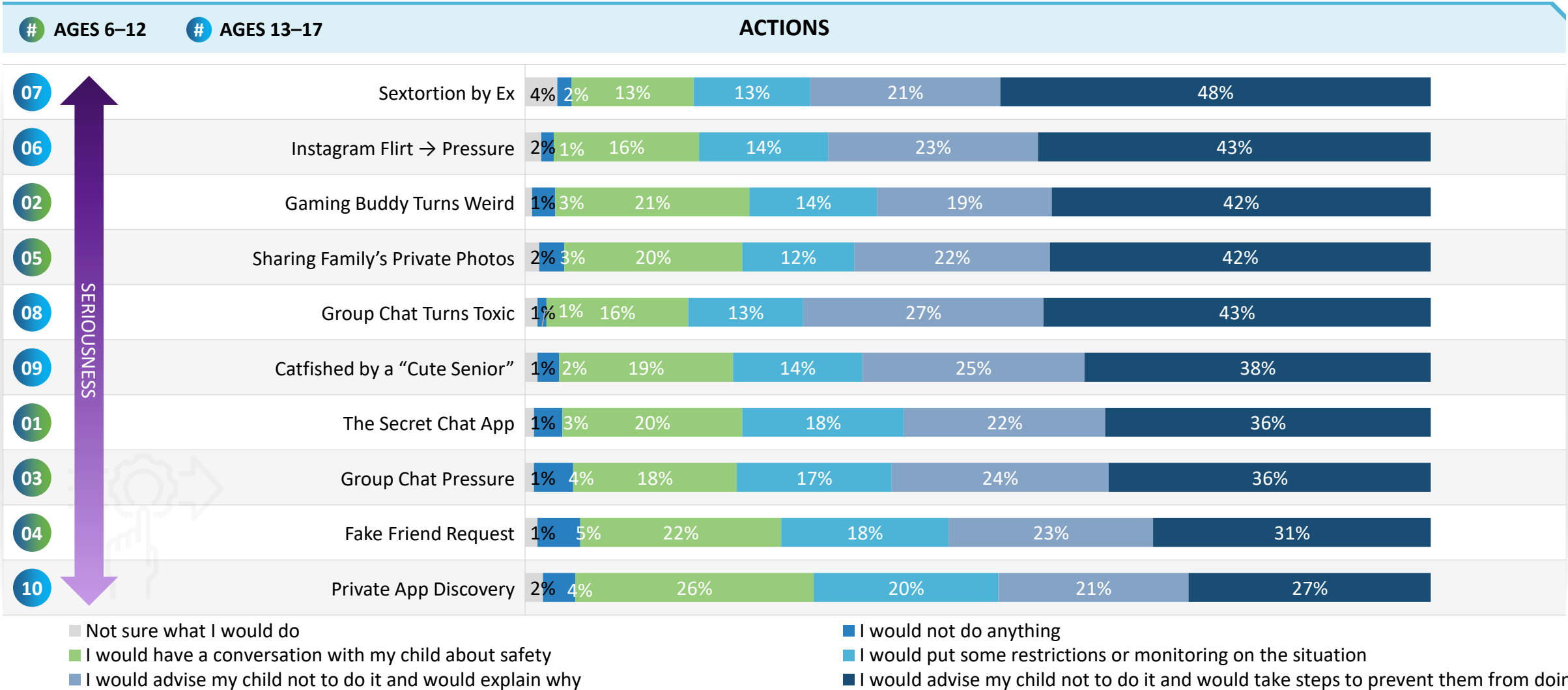
N3. How serious a risk do you consider this situation?

Parents have high confidence their kids would tell them if one of these scenarios happened, although private apps and being catfished are less likely



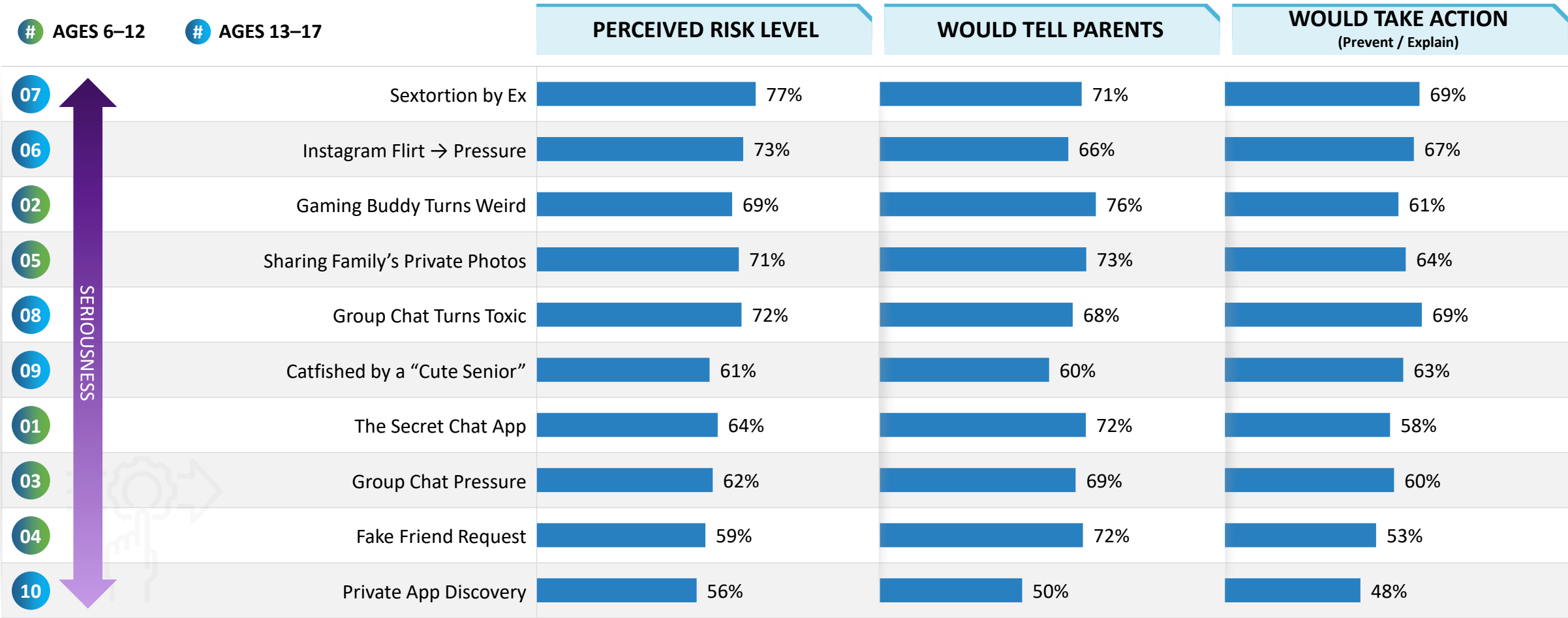
Base: Sextortion by Ex - 505, Instagram Flirt -> Pressure - 505, Gaming Buddy Turns Weird - 509, Sharing Family's Private Photos - 509, Group Chat Turns Toxic - 505, Catfished by a "Cute Senior" - 505, The Secret Chat App - 509, Group Chat Pressure - 509, Fake Friend Request - 509, Private App Discovery - 505
N2. How likely is it that your child would tell you about this situation?

The vast majority say they would monitor each situation at minimum, and the more serious it seems, the more likely they are to take action



Base: Sextortion by Ex - 505, Instagram Flirt -> Pressure - 505, Gaming Buddy Turns Weird - 509, Sharing Family's Private Photos - 509, Group Chat Turns Toxic - 505, Catfished by a "Cute Senior" - 505, The Secret Chat App - 509, Group Chat Pressure - 509, Fake Friend Request - 509, Private App Discovery - 505
N1. If you were in this situation, what would you most likely do?

Scenario Snapshot

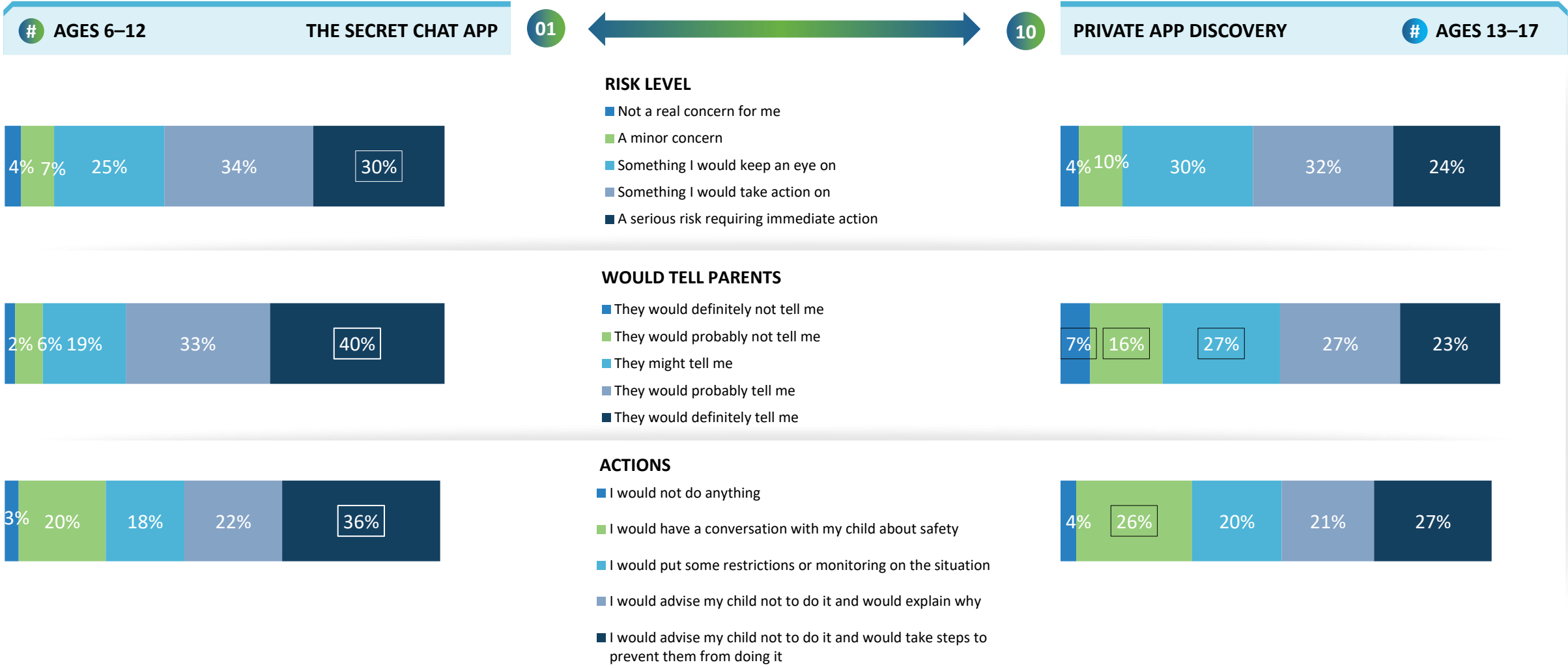


Base: Total - 1014
N3. How serious a risk do you consider this situation?, N2. How likely is it that your child would tell you about this situation?, N1. If you were in this situation, what would you most likely do?

COMPARISON OF SIMILAR SCENARIOS BY AGE

Private / secret apps are considered much more serious for younger children, but younger kids are also more likely to tell their parents about it

SA MARKET INSIGHTS



Base: The Secret Chat App - 509, Private App Discovery - 505
N3. How serious a risk do you consider this situation?, N2. How likely is it that your child would tell you about this situation?, N1. If you were in this situation, what would you most likely do?

COMPARISON OF SIMILAR SCENARIOS BY AGE

Pressure to send hot pics among older kids is deemed more risky than peer pressure among younger children

SA MARKET INSIGHTS



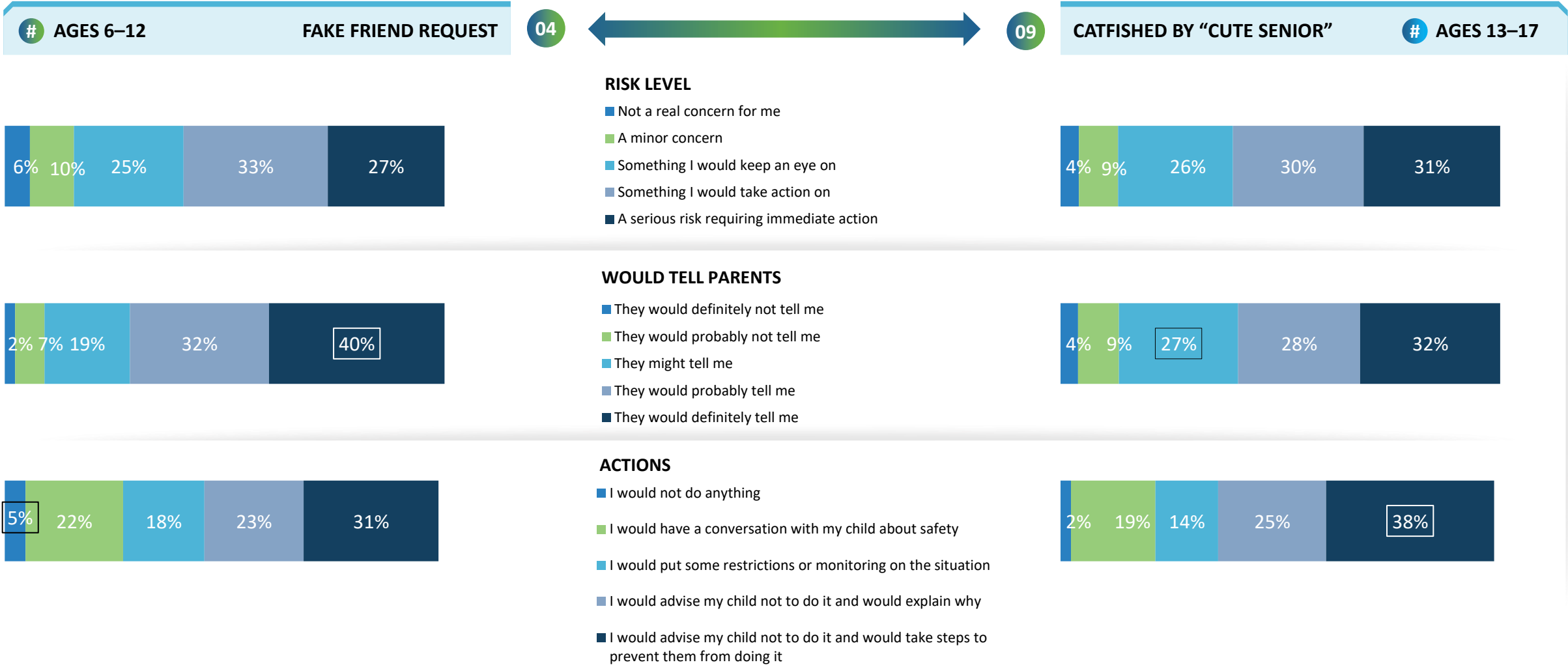
Base: Group Chat Pressure – 509, Group Chat Turns Toxic - 505
N3. How serious a risk do you consider this situation?, N2. How likely is it that your child would tell you about this situation?, N1. If you were in this situation, what would you most likely do?

Indicates significantly higher between scenarios at 95% Confidence level

COMPARISON OF SIMILAR SCENARIOS BY AGE

People pretending to be someone they are not is deemed similarly risky regardless of age group, although younger kids are more likely to tell a parent

SA MARKET INSIGHTS



Base: Fake Friend Request - 509, Catfished by a “Cute Senior” – 505

N3. How serious a risk do you consider this situation?, N2. How likely is it that your child would tell you about this situation?, N1. If you were in this situation, what would you most likely do?

Indicates significantly higher between scenarios at 95% Confidence level



Inappropriate Sexual Content and Exploitation



SUMMARY:

INAPPROPRIATE SEXUAL CONTENT AND EXPLOITATION

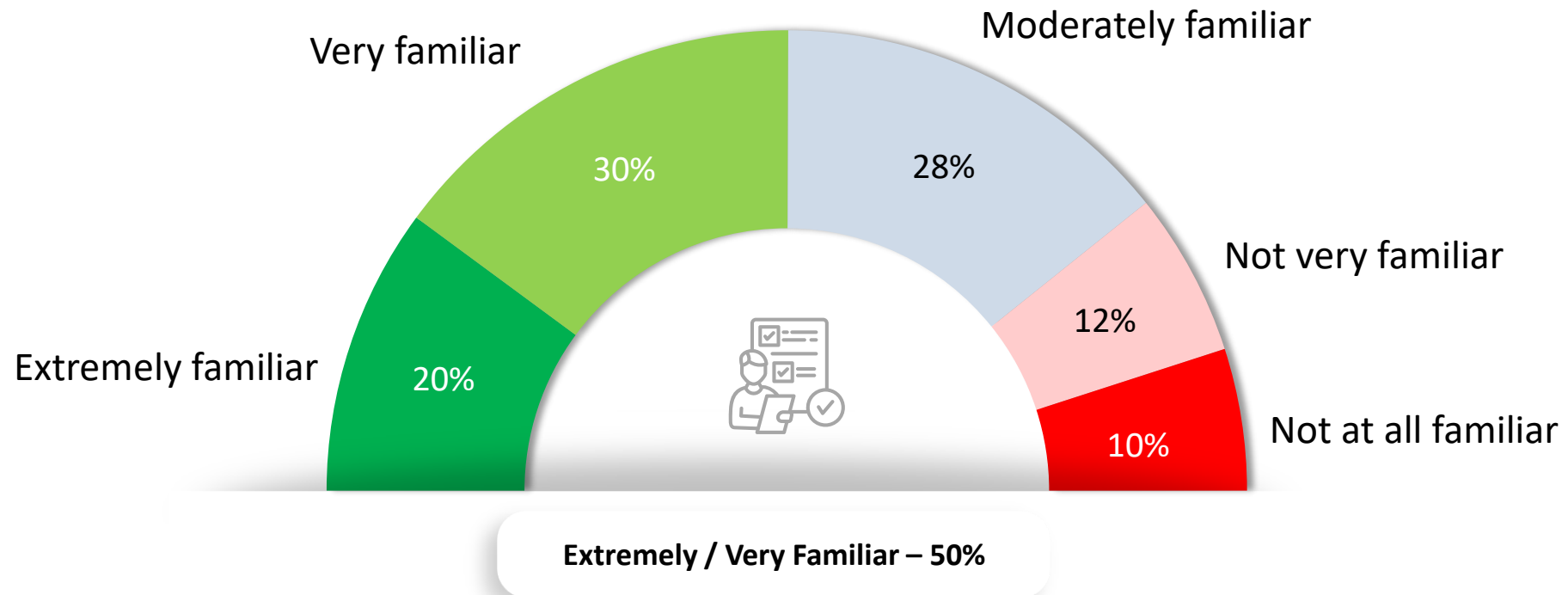
Awareness of sexual exploitation is relatively high, but still incomplete. Familiarity with CSAM and confidence in identifying problematic situations are strongest among the more engaged and technically capable parents, leaving a meaningful recognition gap among others.

Exposure is not limited to explicit sexual material. Suspicious identities, uncomfortable contacts and requests to keep interactions secret appear alongside sexual images and requests for sexual content—reinforcing that grooming often begins with interpersonal behaviors rather than an overtly sexual incident.

The biggest obstacles to responding are relational, not technical. Parents worry about damaging trust, overreacting or whether their child would disclose the situation; meanwhile, only about a third are highly confident they would recognize warning signs.

The majority of parents are familiar with the term “child sexual abuse material”, referred to as CSAM

FAMILIARITY WITH CHILD SEXUAL ABUSE MATERIAL (CSAM) TERM

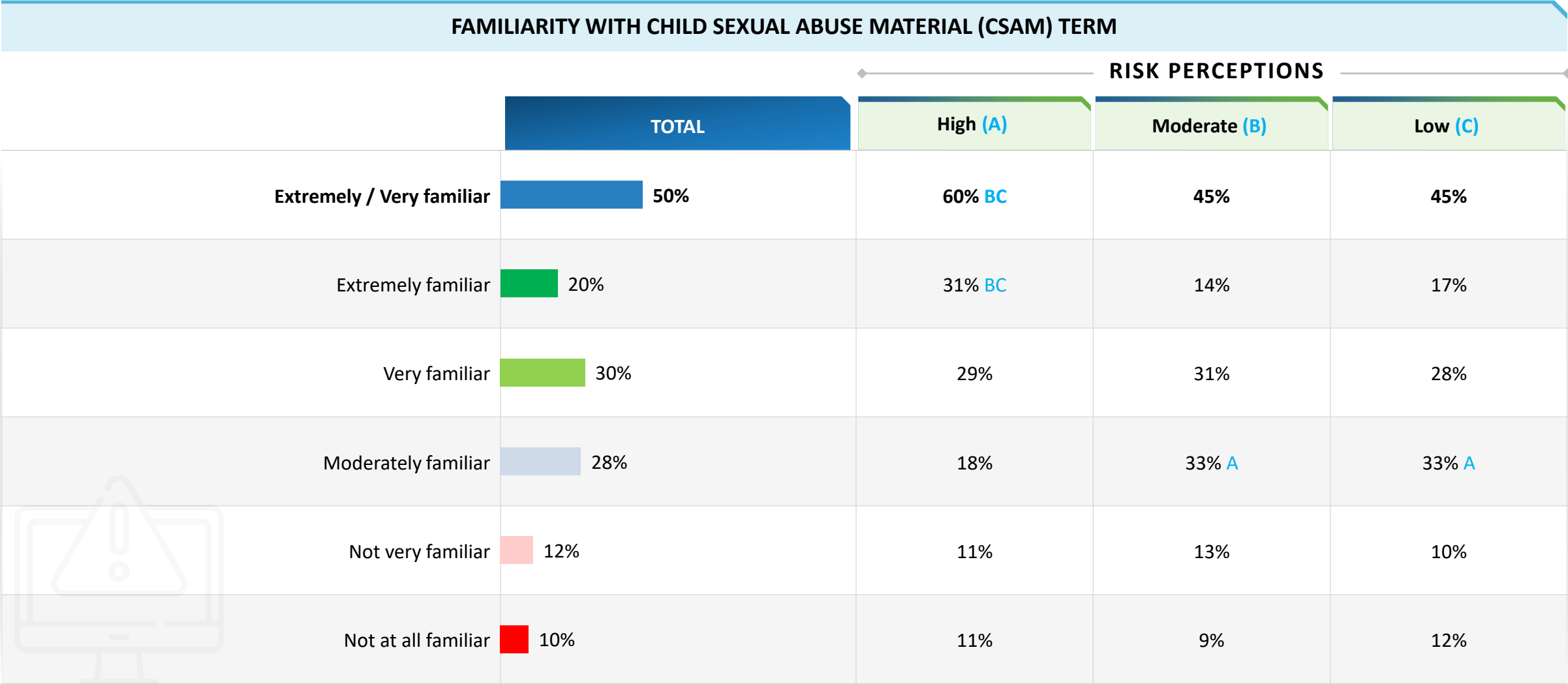


Base: Total – 1014

X1. How familiar are you with the term “child sexual abuse material” (sometimes called CSAM)?

The higher the parent’s perceived risk online, the more familiar they are with CSAM

SA MARKET INSIGHTS



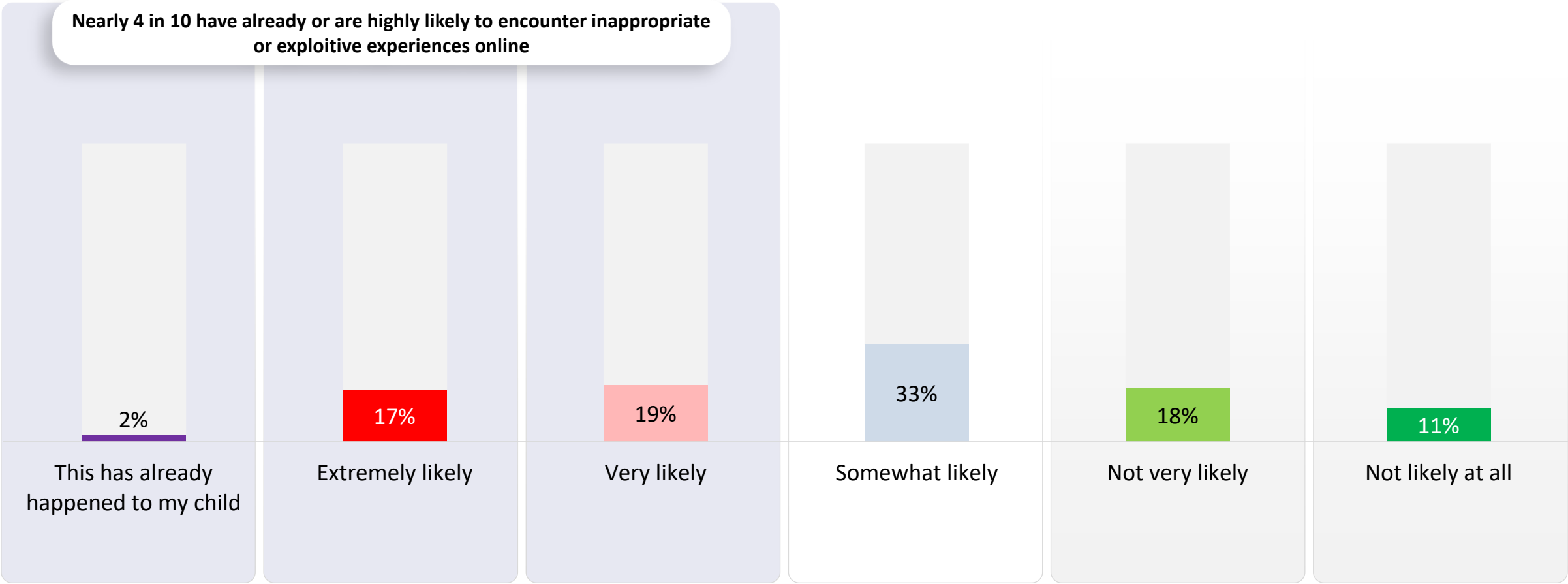
Base: Total - 1014, Risk Perceptions: High - 333, Moderate - 467, Low - 214

X1. How familiar are you with the term “child sexual abuse material” (sometimes called CSAM)?

Letters in BLUE indicates significant difference at 95% confidence level

Parents are split on the likelihood of their children encountering inappropriate or exploitive online experiences, with 4 in 10 saying it's highly likely (or already happened) and 3 in 10 saying it's not likely

LIKELIHOOD CHILDREN WILL ENCOUNTER INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES



Base: Total - 1014
X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?

Letters in BLUE indicates significant difference at 95% confidence level

The higher the perceived risk online, the more likely parents are to think their children may be exposed to inappropriate sexual content or exploitation online

LIKELIHOOD CHILDREN WILL ENCOUNTER INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES

	TOTAL	RISK PERCEPTIONS		
		High (A)	Moderate (B)	Low (C)
Has Happened / Extremely / Very Likely	38%	56% BC	31%	26%
This has already happened to my child	2%	4% B	0%	3% B
Extremely likely	17%	29% BC	11%	12%
Very likely	19%	24% C	19% C	10%
Somewhat likely	33%	24%	43% AC	23%
Not very likely	18%	10%	19% A	27% AB
Not likely at all	11%	9%	7%	24% AB

Base: Total - 1014, Risk Perceptions: High - 333, Moderate - 467, Low - 214
X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?

Letters in BLUE indicates significant difference at 95% confidence level

Apps / platforms with the highest usage by children are deemed less risky related to inappropriate or exploitive online experiences

LIKELIHOOD CHILDREN WILL ENCOUNTER INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES

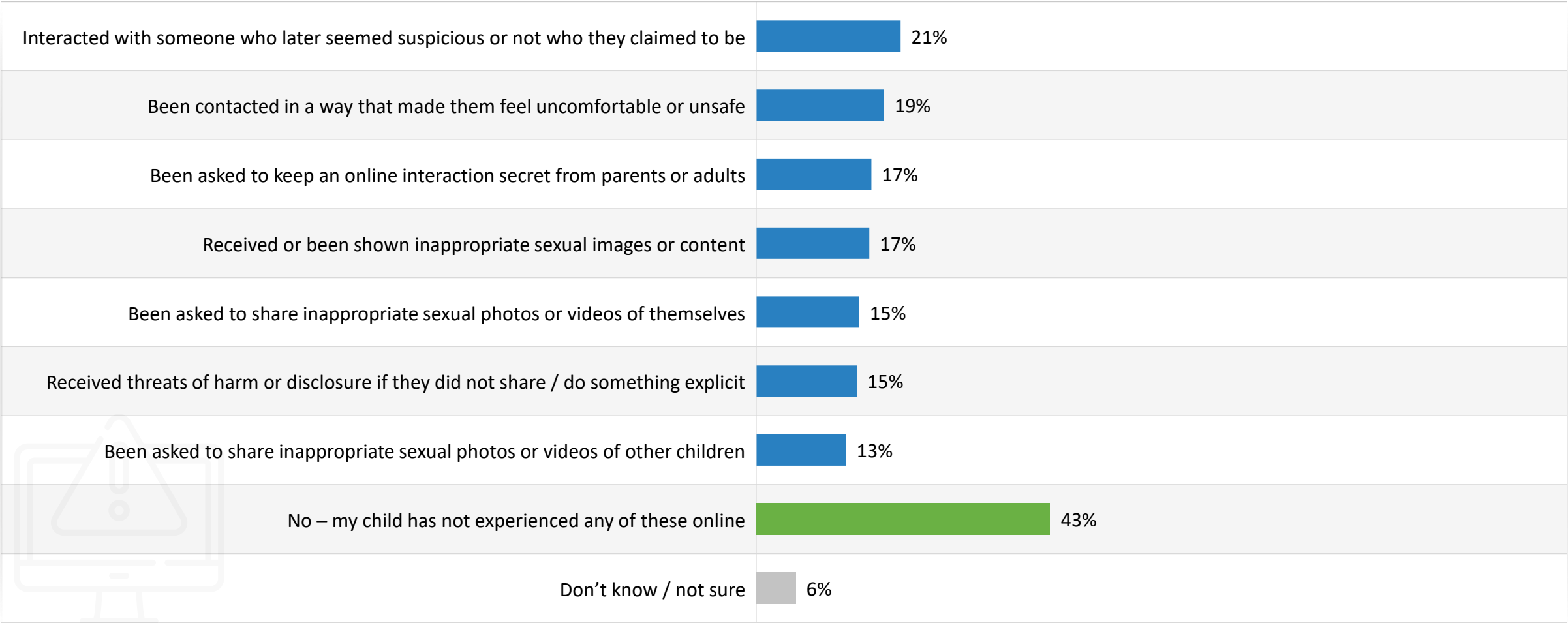
		APPS USED BY KIDS						
	TOTAL	Social Media (A)	Gaming (B)	Messaging (C)	AI (D)	Private Messaging (E)	Betting/ Prediction (F)	Relationship (G)
Has Happened / Extremely / Very Likely	38%	39%	39%	43%	47% AB	68% ABCD	71% ABCD	73% ABCD
This has already happened to my child	2%	2%	2%	2%	2%	1%	2%	2%
Extremely likely	17%	17%	18% A	19% AB	22% ABC	34% ABCD	37% ABCD	35% ABCD
Very likely	19%	20% B	19%	21% AB	23% AB	32% ABCD	32% ABCD	36% ABCD
Somewhat likely	33%	33% EFG	33% EFG	33% EFG	32% EFG	20%	19%	17%
Not very likely	18%	17% CEFG	18% CDEFG	16% EFG	16% EFG	10%	9%	8%
Not likely at all	11%	10% CDEFG	10% CDEFG	8% DEFG	6% EFG	3% F	1%	3% F

Letters in **BLUE** indicates significant difference at 95% confidence level

Base: Total - 1014, Social Media – 958, Gaming – 934, Messaging - 833, AI – 621, Private Messaging - 228, Betting / Prediction – 207, Relationship - 182
X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?

More than half of these parents have children who have already been exposed to at least one of these situations, topped by interacting with someone suspicious, followed by feeling unsafe

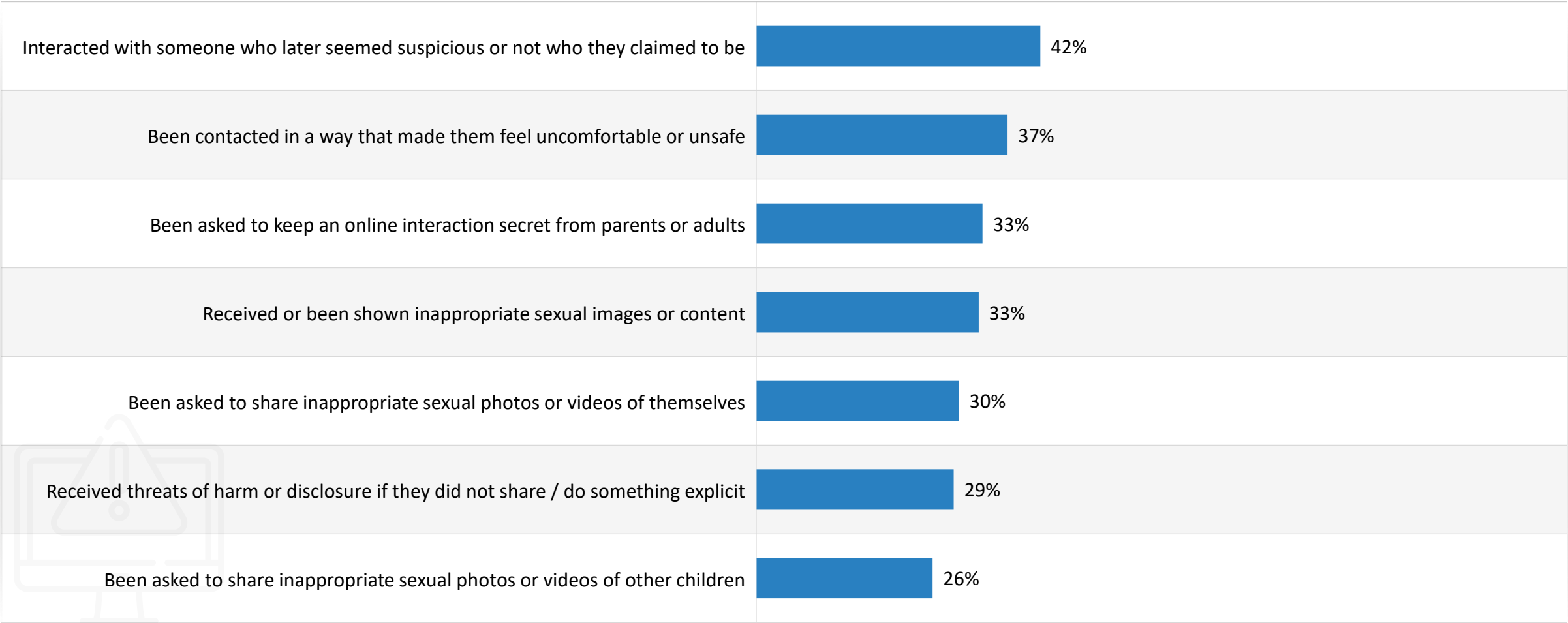
INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCE EXPOSURE



Base: Total - 1014
X3. To your knowledge, has your child(ren) ever experienced any of the following online?

Looking at only those who have experienced one of these issues, 4 in 10 interacted with someone suspicious

INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCE EXPOSURE AMONG THOSE WHO HAVE EXPERIENCED ANY



*Note: Data excluding “No and Don’t know” reported here

Base (Excluding No and Don’t know): Total - 515
X3. To your knowledge, has your child(ren) ever experienced any of the following online?

These risky interactions are more common as app / platform use becomes more niche

INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES EXPOSURE								
APPS USED BY KIDS								
	TOTAL	Social Media (A)	Gaming (B)	Messaging (C)	AI (D)	Private Messaging (E)	Betting/ Prediction (F)	Relationship (G)
Interacted with someone who later seemed suspicious or not who they claimed to be	21%	22%	22%	24% AB	29% ABC	37% ABCD	36% ABCD	40% ABCD
Been contacted in a way that made them feel uncomfortable or unsafe	19%	19%	19%	21% AB	23% ABC	32% ABCD	31% ABCD	36% ABCDF
Been asked to keep an online interaction secret from parents or adults	17%	18%	18%	19% AB	22% ABC	33% ABCD	36% ABCD	34% ABCD
Received or been shown inappropriate sexual images or content	17%	18%	17%	19% AB	21% ABC	30% ABCD	31% ABCD	30% ABCD
Been asked to share inappropriate sexual photos or videos of themselves	15%	16%	16%	18% AB	21% ABC	32% ABCD	31% ABCD	32% ABCD
Received threats of harm or disclosure if they did not share / do something explicit	15%	16%	16%	17% AB	20% ABC	33% ABCD	35% ABCD	35% ABCD
Been asked to share inappropriate sexual photos or videos of other children	13%	14%	14%	15% AB	18% ABC	26% ABCD	28% ABCD	26% ABCD
No – my child has not experienced any of these online	43%	42% CDEFG	42% CDEFG	38% EDFG	31% EFG	12%	12%	9%
Don't know / not sure	6%	6% DEFG	6% DEFG	5% DEFG	4% EFG	0%	0%	1%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Social Media – 958, Gaming – 934, Messaging - 833, AI – 621, Private Messaging - 228, Betting / Prediction – 207, Relationship - 182
X3. To your knowledge, has your child(ren) ever experienced any of the following online?

Children who have experienced CSAM use a wider range of devices and apps; their parents are less prepared, have little focus on online safety, lack tech experience, and are more likely to say others should be responsible for their kid’s online safety

	Experienced CSAM	Have not Experienced CSAM
 Devices Used by Kids in HH	Laptop / Desktop PCs / Chromebooks (64%) Smart Speakers (44%)	Smart TVs or Video Streaming Devices (78%)
 Apps Used by Kids	Social Media (98%) Gaming (95%)	Social Media (91%) Gaming (89%)
 Parental Control Capability	I could do it with instructions from the solution provider (15%) I could do it with help from a trusted person (14%)	I can set up and customize advanced controls on my own (49%)
 Preparedness	I would need help from a professional (12%) I would need help from a trusted friend or advisor (10%)	I feel very prepared to prevent or respond to this (42%)
 Likelihood Child has Private Account (Has already / Extremely / Very)	50%	12%
 Likelihood to Come to Parent with Issue (Definitely / Probably)	68%	87%
 CSAM Familiarity (Extremely / Very)	59%	44%
 Likelihood Children will Encounter Inappropriate or Exploitive Online Experiences (Has happened/Extremely / Very)	58%	18%
 Who is Responsible for Child Online Safety	Internet service providers (32%) Device manufacturers (27%)	Parents or guardians (89%)
 Online Risk Level (Very high / High)	38%	27%
 Focus on Online Safety	Minimal (16%)	Active (62%)
 Tech Experience	Inexperienced (37%)	Experienced (75%)
 Risk Perception	High (38%)	Low (26%)

Base: Experienced CSAM – 515, Inexperienced CSAM - 440

Numbers in Green indicates significant higher at 95% confidence level

Although the types of exposure experienced are similar regardless of a parent's focus on online safety, the more vigilant they are, the less likely their kids are to experience any of these

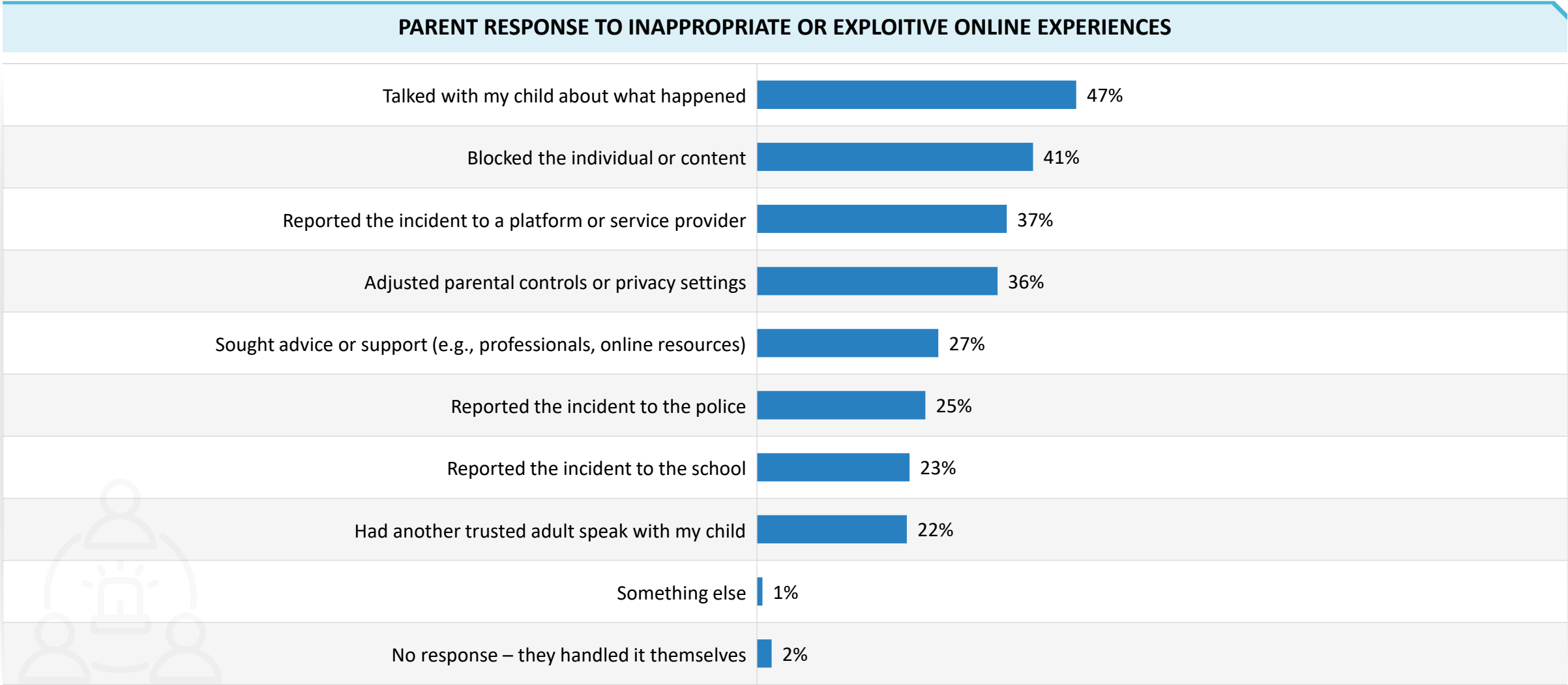
INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES EXPOSURE				
		FOCUS ON ONLINE SAFETY		
	TOTAL	Minimal (A)	Basic (B)	Active (C)
Interacted with someone who later seemed suspicious or not who they claimed to be	21%	22%	19%	22%
Been contacted in a way that made them feel uncomfortable or unsafe	19%	21%	15%	20%
Been asked to keep an online interaction secret from parents or adults	17%	24% B	14%	17%
Received or been shown inappropriate sexual images or content	17%	21%	17%	16%
Been asked to share inappropriate sexual photos or videos of themselves	15%	19%	13%	16%
Received threats of harm or disclosure if they did not share / do something explicit	15%	20%	13%	15%
Been asked to share inappropriate sexual photos or videos of other children	13%	13%	13%	14%
No – my child has not experienced any of these online	43%	29%	41% A	48% AB
Don't know / not sure	6%	8%	9% C	4%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Minimal – 131, Basic – 310, Active - 573

X3. To your knowledge, has your child(ren) ever experienced any of the following online?

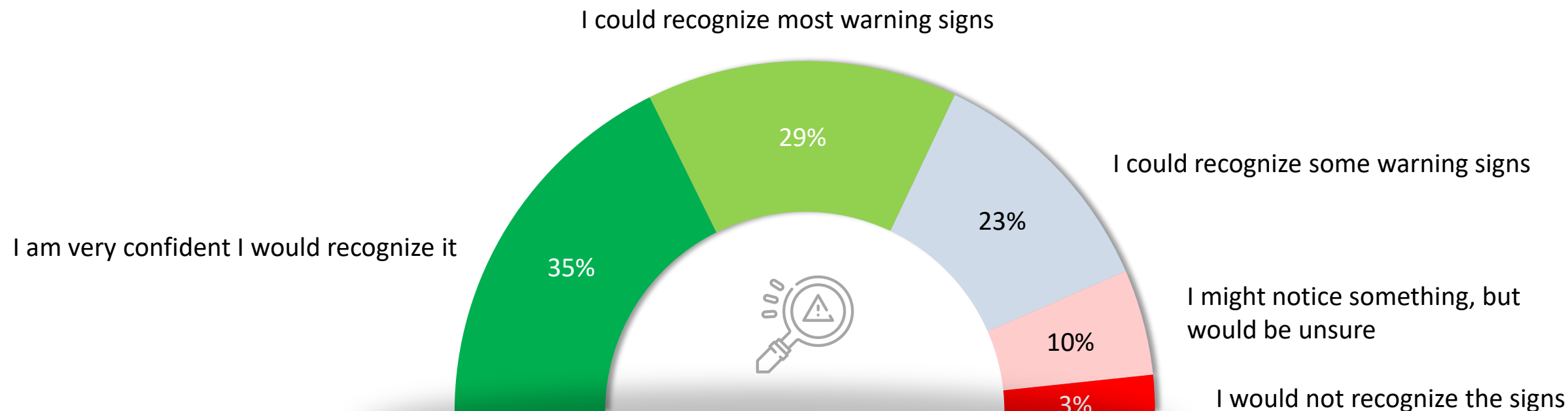
Among those whose kids have been exposed to inappropriate or exploitive online experiences, only half say they talked to their child about it



Base (Those whose child has been exposed to inappropriate or exploitive online experiences): Total - 515
X4. When your child(ren) experienced concerning or inappropriate online interaction, what was your response?

A third are very confident they would recognize signs that their children may be experiencing inappropriate or exploitive interactions online

CONFIDENCE IN RECOGNIZING SIGNS OF AN INAPPROPRIATE OR EXPLOITIVE ONLINE INCIDENT



Base: Total – 1014

X5. How confident are you in your ability to recognize signs that your child(ren) may be experiencing inappropriate or exploitive interactions online?

The more tech advanced the parent is, the more confident they are that they would recognize warning signs that their child was experiencing exploitive interactions

CONFIDENCE IN RECOGNIZING AN INAPPROPRIATE OR EXPLOITIVE ONLINE INCIDENT			
	TOTAL	TECH EXPERIENCE	
		Experienced (A)	Inexperienced (B)
I am very confident I would recognize it	35%	40% B	26%
I could recognize most warning signs	29%	30%	26%
I could recognize some warning signs	23%	20%	28% A
I might notice something, but would be unsure	10%	7%	16% A
I would not recognize the signs	3%	3%	5%

Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325
X5. How confident are you in your ability to recognize signs that your child(ren) may be experiencing inappropriate or exploitive interactions online?

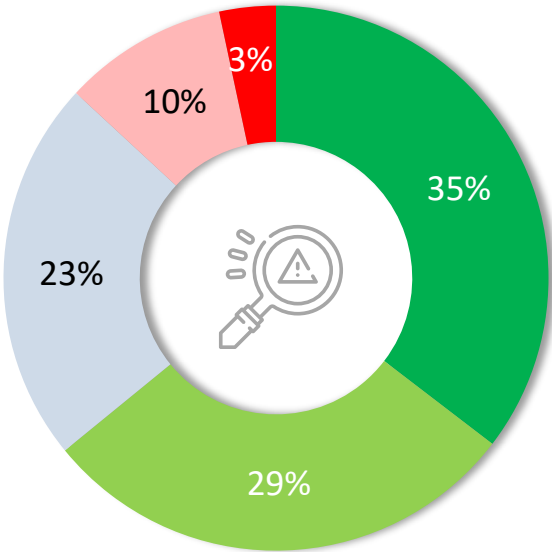
Letters in BLUE indicates significant difference at 95% confidence level

Across age groups, the majority of parents feel confident they would recognize at least some warning signs that their child may be experiencing an issue online

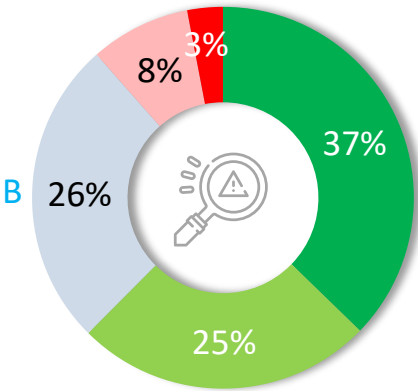
CONFIDENCE IN RECOGNIZING SIGNS OF AN INAPPROPRIATE OR EXPLOITIVE ONLINE INCIDENT

AGES OF CHILDREN IN THE HOUSEHOLD

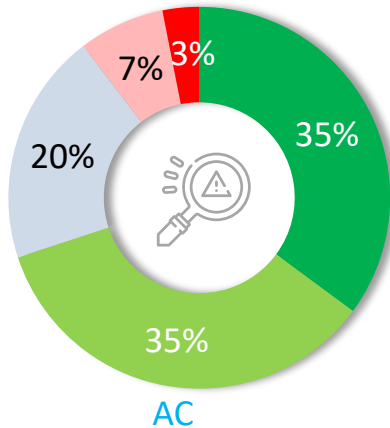
TOTAL



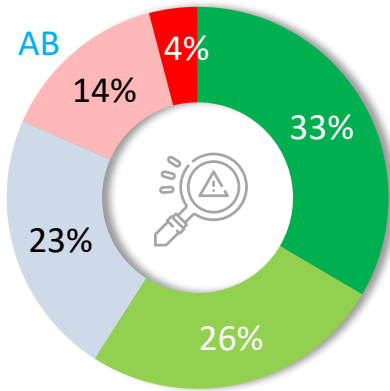
Younger Children Only (12 or under) (A)



Both 6 – 12 Years and 13 – 17 Years (B)



Older Children Only (13 or above) (C)

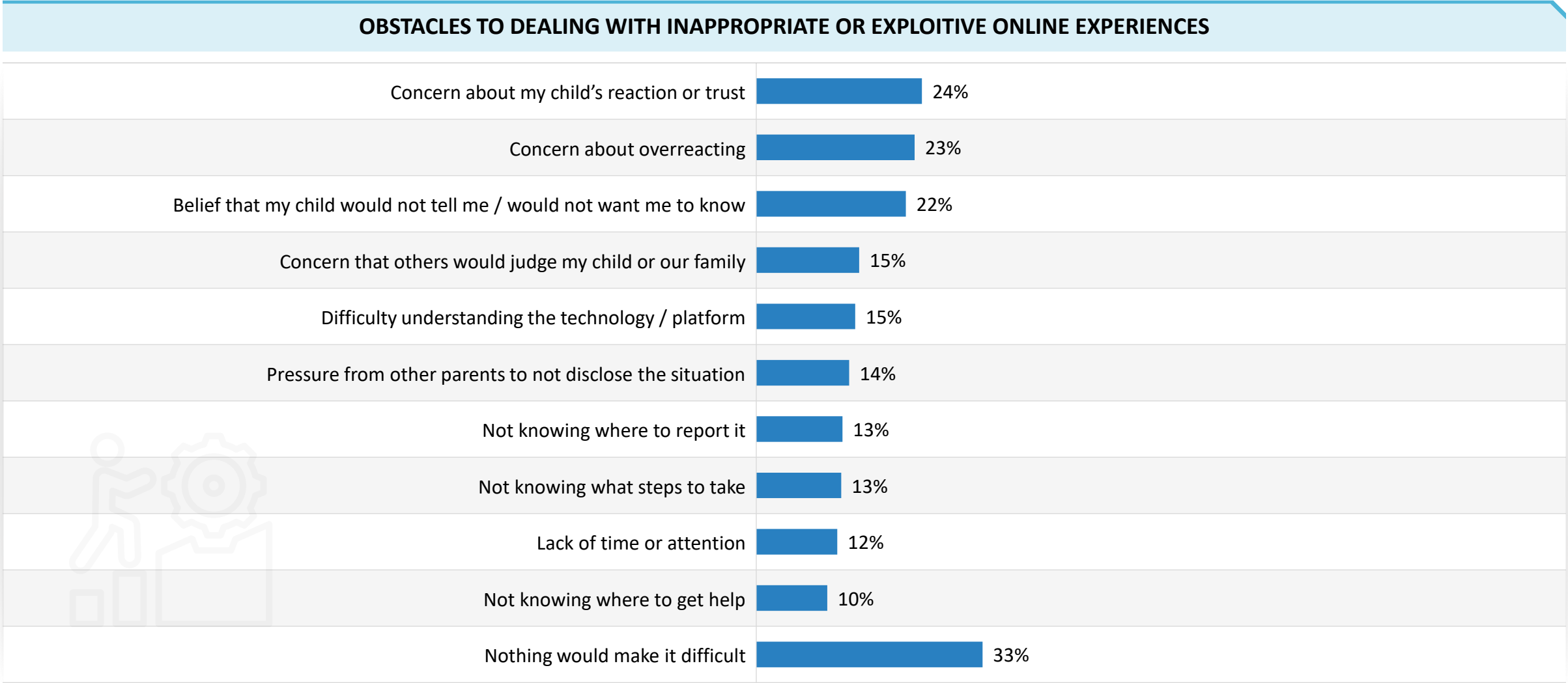


- I am very confident I would recognize it
- I could recognize most warning signs
- I could recognize some warning signs
- I might notice something, but would be unsure
- I would not recognize the signs

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293
X5. How confident are you in your ability to recognize signs that your child(ren) may be experiencing inappropriate or exploitive interactions online?

Letters in BLUE indicates significant difference at 95% confidence level

Obstacles to dealing with inappropriate or exploitive experiences are relationship-driven: concern about trust, overreacting, or that the child wouldn't want them to know



Base: Total - 1014
X6. What, if anything, would make it difficult for you to address a situation involving inappropriate or exploitive online content?



Improving Online Safety



SUMMARY: IMPROVING ONLINE SAFETY

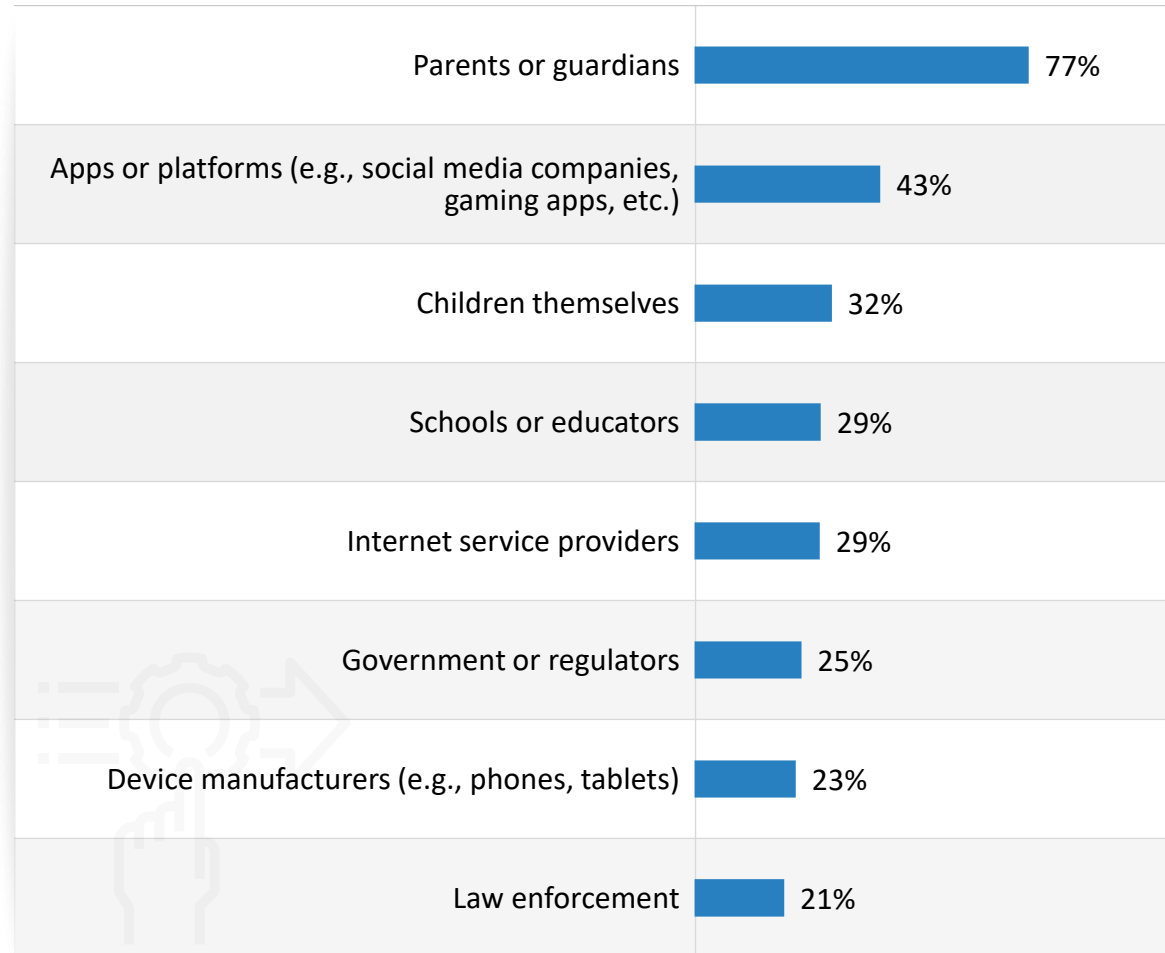
Parents see themselves as the primary line of defense, but they clearly expect shared responsibility. Apps/platforms rank second, well ahead of most other stakeholders, signaling that parents do not believe families can solve online safety alone.

The strongest demand is for prevention to be built into the digital environment: stronger platform safeguards and better parental controls lead, followed by identity verification and faster removal of harmful content or users.

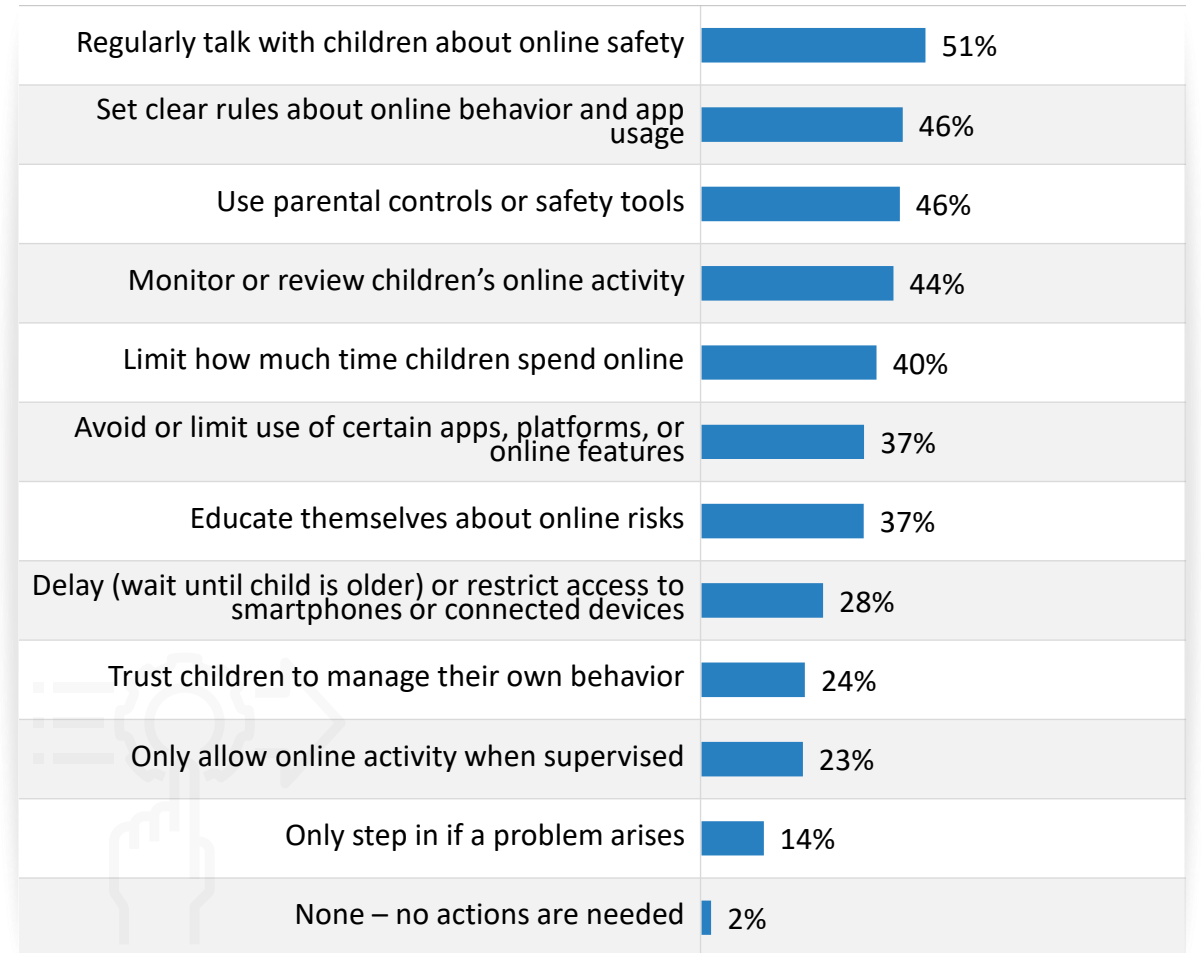
The barriers are as much behavioral as technological. Trusting the child, keeping up with new risks, peer pressure, children circumventing rules and protecting privacy all complicate action—so successful interventions need to reduce both parental workload and family friction.

Parents largely take responsibility for their kid's online safety, with next highest responsibility falling on the shoulders of the apps / platforms themselves; communicating with their kids about online safety is the top recommended action

WHO IS RESPONSIBLE FOR CHILD'S ONLINE SAFETY



ACTIONS PARENTS SHOULD TAKE FOR CHILD'S ONLINE SAFETY



Base: Total - 1014

A1. Who do you believe should be primarily responsible for keeping children safe online?, A3. Which of the following actions do you believe parents should take to help keep their children safe online?

Parents who are experienced with technology are highly likely to view themselves as responsible for keeping their kids safe online and are especially more likely to point to apps / platforms as having responsibility

WHO IS RESPONSIBLE FOR CHILD'S ONLINE SAFETY

	TOTAL	TECH EXPERIENCE	
		Experienced (A)	Inexperienced (B)
Parents or guardians	77%	80% B	69%
Apps or platforms (e.g., social media companies, gaming apps, etc.)	43%	47% B	33%
Children themselves	32%	31%	33%
Schools or educators	29%	28%	30%
Internet service providers	29%	29%	29%
Government or regulators	25%	26% B	21%
Device manufacturers (e.g., phones, tablets)	23%	26% B	18%
Law enforcement	21%	20%	21%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

A1. Who do you believe should be primarily responsible for keeping children safe online?

Although both groups are most likely to say that parents should regularly talk with children about online safety, tech-experienced parents believe parents should take a wider range of steps to keep their children safe online

ACTIONS PARENTS SHOULD TAKE FOR CHILDREN SAFETY

		TECH EXPERIENCE	
		Experienced (A)	Inexperienced (B)
Regularly talk with children about online safety	51%	56% B	42%
Set clear rules about online behavior and app usage	46%	50% B	38%
Use parental controls or safety tools	46%	51% B	35%
Monitor or review children's online activity	44%	47% B	37%
Limit how much time children spend online	40%	42% B	36%
Avoid or limit use of certain apps, platforms, or online features	37%	40% B	32%
Educate themselves about online risks	37%	39% B	33%
Delay (wait until child is older) or restrict access to smartphones or connected devices	28%	28%	27%
Trust children to manage their own behavior	24%	24%	22%
Only allow online activity when supervised	23%	25% B	19%
Only step in if a problem arises	14%	14%	15%
None – no actions are needed	2%	2%	2%

Letters in **BLUE** indicates significant difference at 95% confidence level

Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

A3. Which of the following actions do you believe parents should take to help keep their children safe online?

Parents are looking for apps and platforms to build in stronger protections, and seek better controls/ tools; the top challenges to keeping kids safe are trusting kids to manage themselves, keeping up with the risks, and peer pressure

ONLINE SAFETY NEEDS FOR CHILDREN

Stronger protections and safeguards built into apps and platforms	46%
Better parental controls and monitoring tools	45%
Stronger age verification or identity checks	41%
Faster removal of harmful content or users	40%
More education for children about online safety	37%
Stricter rules or regulation of online platforms	36%
Greater enforcement against offenders	31%
More guidance and resources for parents	29%
Improved reporting tools	28%
More community-based monitoring or shared responsibility	26%
More involvement from schools or educators	25%
None – nothing will be effective	3%

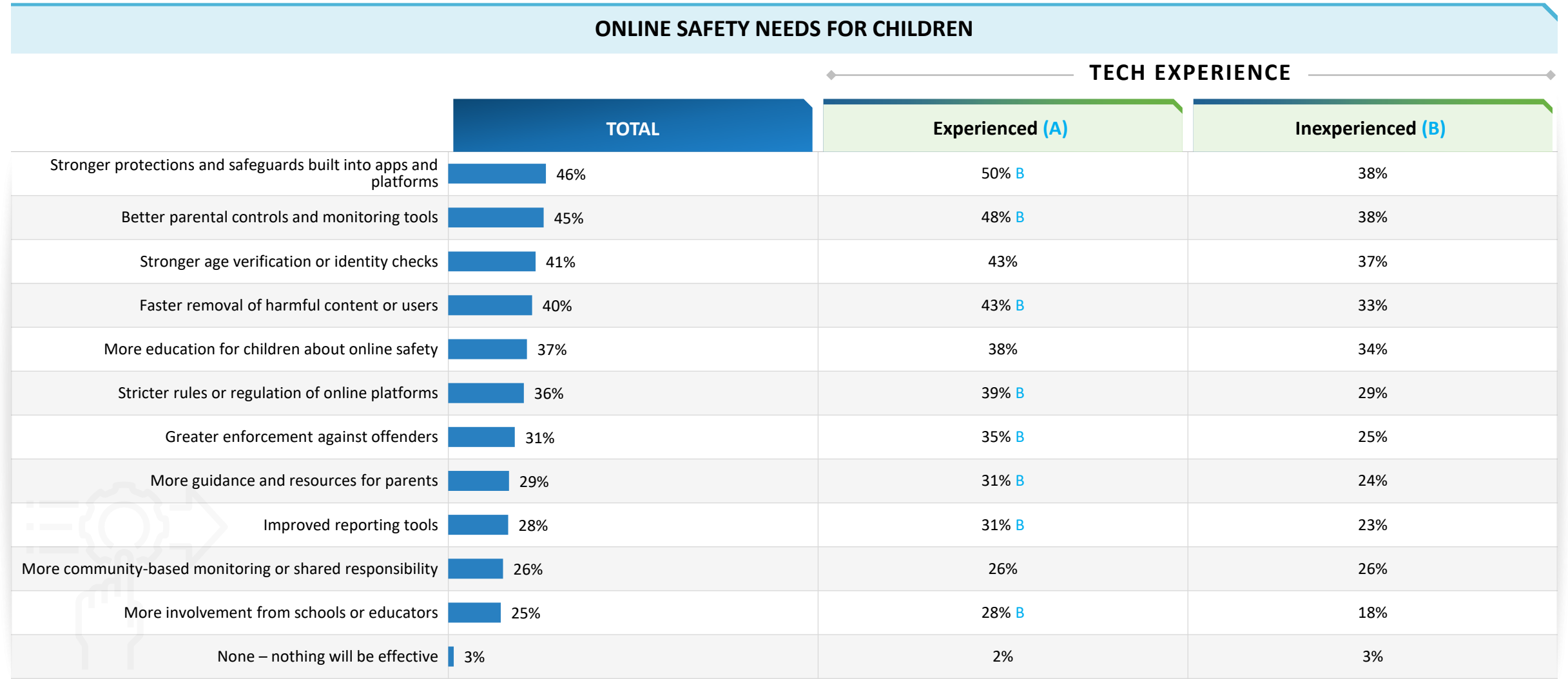
OBSTACLES TO TAKING ACTIONS FOR ONLINE SAFETY

I trust my child to manage their own behavior	24%
It's hard to keep up with new apps and risks	22%
Pressure because other kids have devices / apps	21%
My child resists or finds ways around rules	20%
I don't always know what my child is doing online	18%
I don't want to invade my child's privacy or damage trust	17%
Don't have enough time to monitor consistently	15%
Tools or settings are too complicated	14%
I find it difficult enforcing rules	13%
Not sure what the right steps to take are	10%
I don't feel confident handling these situations	8%
I don't think any actions are necessary	6%
Nothing makes it difficult	27%

Base: Total - 1014

A2. Which of the following do you believe would be most effective in improving online safety for children?, A4. What, if anything, makes it difficult to take actions to help keep your child(ren) safe online?

Techy parents see a wider range of solutions being effective at keeping kids safe online, especially built-in safeguards in apps / platforms



Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

A2. Which of the following do you believe would be most effective in improving online safety for children?

Letters in BLUE indicates significant difference at 95% confidence level

Parents who perceive online risk to be low are less likely to find obstacles to taking action to keep their kids safe

OBSTACLES TO TAKING ACTION FOR ONLINE SAFETY

		RISK PERCEPTIONS		
	TOTAL	High (A)	Moderate (B)	Low (C)
I trust my child to manage their own behavior	24%	24%	24%	24%
It's hard to keep up with new apps and risks	22%	25% C	23%	17%
Pressure because other kids have devices / apps	21%	26% C	20%	17%
My child resists or finds ways around rules	20%	22%	22% C	15%
I don't always know what my child is doing online	18%	18% C	21% C	9%
I don't want to invade my child's privacy or damage trust	17%	16%	19%	14%
Don't have enough time to monitor consistently	15%	17% C	15% C	9%
Tools or settings are too complicated	14%	17% C	15% C	9%
I find it difficult enforcing rules	13%	13%	15% C	10%
Not sure what the right steps to take are	10%	12%	10%	9%
I don't feel confident handling these situations	8%	10%	8%	6%
I don't think any actions are necessary	6%	6%	7%	4%
Nothing makes it difficult	27%	23%	24%	40% AB

Base: Total - 1014, Risk Perceptions: High - 333, Moderate - 467, Low - 214
A4. What, if anything, makes it difficult to take actions to help keep your child(ren) safe online?

Letters in BLUE indicates significant difference at 95% confidence level



Solutions



SUMMARY: SOLUTIONS

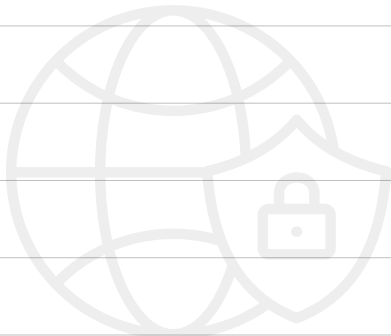
Parents favor solutions that directly prevent, detect or stop harm. Parental controls, real-time alerts, content filtering and privacy/data protection lead interest and credibility, while parent guidance and communication-oriented tools generally have less pull.

There is meaningful white space between what parents want and what they currently use. In particular, real-time alerts and emergency/help features combine relatively strong interest with much lower current usage, suggesting an opportunity beyond traditional parental controls.

There is no single ideal safety solution. The preference analysis identifies Hands-On Control, Balanced Safety and Automated Protection mindsets; the majority Balanced Safety group has broader, less polarized needs, while the other groups have much stronger preferences for particular types of intervention.

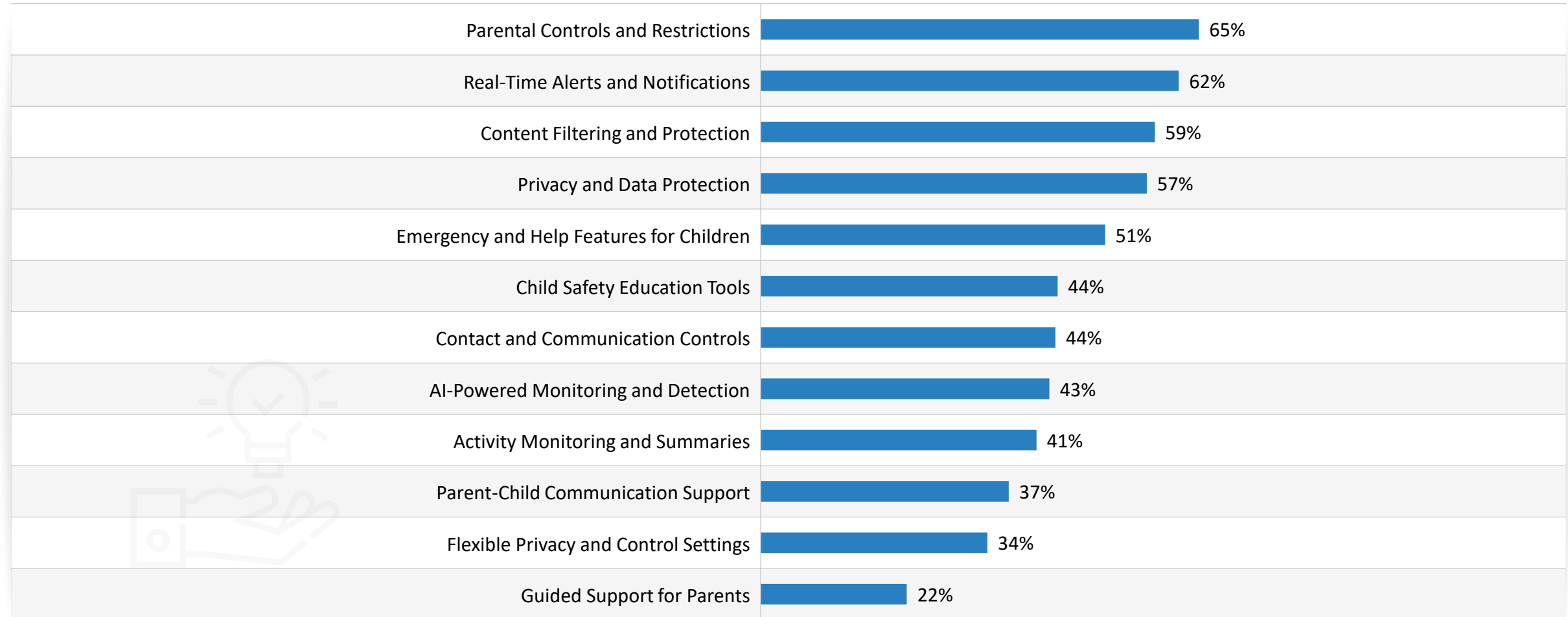
12 SOLUTIONS FOR CHILDREN’S ONLINE SAFETY WERE ASSESSED

NAME		DESCRIPTION
1	AI-Powered Monitoring and Detection	Automatically scans messages and activity to detect risks like bullying, grooming, or inappropriate content
2	Real-Time Alerts and Notifications	Immediately alerts parents when concerning behavior or interactions are detected
3	Parental Controls and Restrictions	Lets parents block apps, limit access, and control what their child can do online
4	Contact and Communication Controls	Limits who children can interact with and blocks unknown or suspicious contacts
5	Privacy and Data Protection	Prevents sharing of personal information and ensures the child’s data is kept secure and private
6	Content Filtering and Protection	Blocks or filters inappropriate, explicit, or harmful content automatically
7	Activity Monitoring and Summaries	Provides clear summaries of apps used, contacts, and overall online activity
8	Guided Support for Parents	Gives parents clear recommendations and guidance on what to do when issues arise
9	Child Safety Education Tools	Teaches children how to recognize risks and make safer decisions online
10	Parent-Child Communication Support	Provides tools and prompts to help parents talk with their children about online safety
11	Emergency and Help Features for Children	Includes SOS buttons and easy ways for children to report concerns or ask for help
12	Flexible Privacy and Control Settings	Lets families choose the balance between monitoring and child privacy based on age or preference



Parents prioritize solutions that directly manage or intervene with children's online activities

PRIORITIZATION OF SOLUTIONS – PROBABILITY OF CHOICE



Base: Total – 1014

V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?

Solution interest among parents is similar regardless of the age of their children

PRIORITIZATION OF SOLUTIONS – PROBABILITY OF CHOICE - RANKING

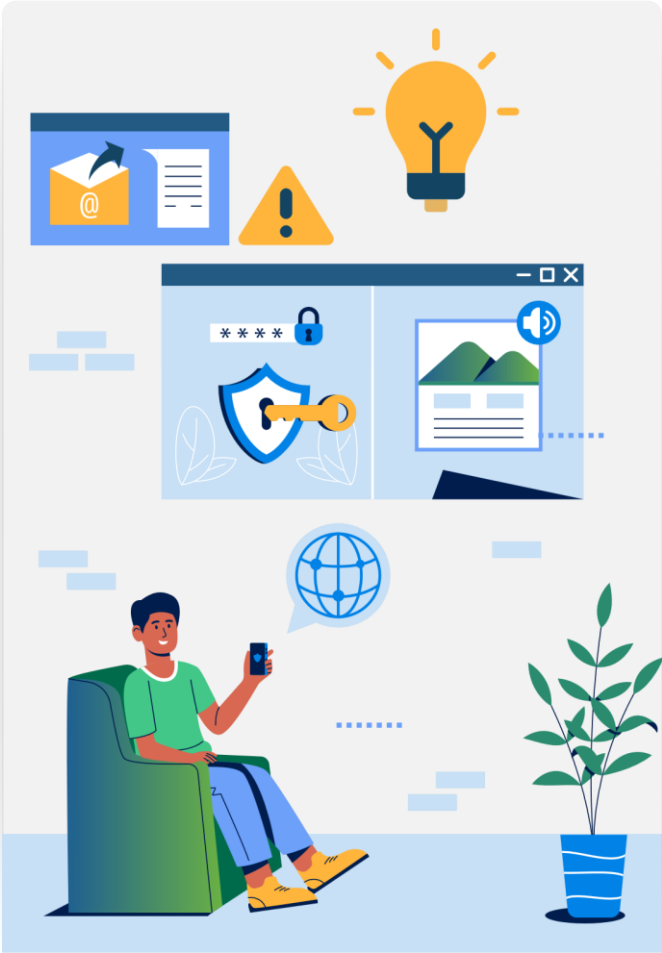
		AGES OF CHILDREN IN THE HOUSEHOLD			RANKING
		TOTAL	Younger Children Only (12 or under)	Both 6 – 12 Years and 13 – 17 Years	
Parental Controls and Restrictions	65%	1	1	2	
Real-Time Alerts and Notifications	62%	2	3	1	
Content Filtering and Protection	59%	3	4	3	
Privacy and Data Protection	57%	4	2	5	
Emergency and Help Features for Children	51%	5	5	4	
Child Safety Education Tools	44%	7	8	6	
Contact and Communication Controls	44%	6	9	7	
AI-Powered Monitoring and Detection	43%	8	6	8	
Activity Monitoring and Summaries	41%	9	7	9	
Parent-Child Communication Support	37%	11	10	10	
Flexible Privacy and Control Settings	34%	10	11	11	
Guided Support for Parents	22%	12	12	12	

Base: Total - 1014, Age of Child: 12 or under - 365, Both 6-12 years and 13-17 years - 356, 13 or above - 293

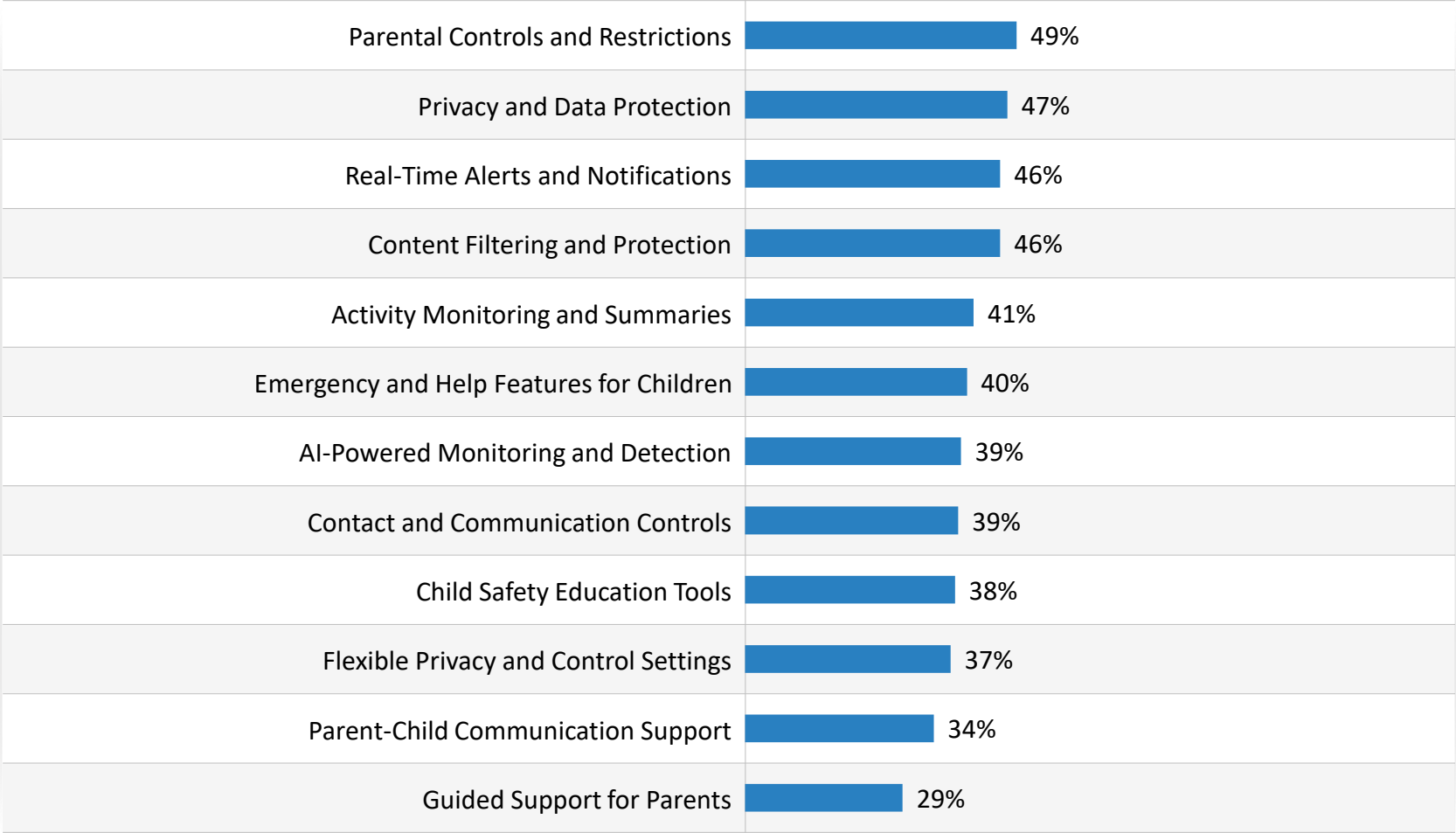
V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?

Indicates higher >4 in position between groups

Three of the bottom four least credible solutions focus on communications and education

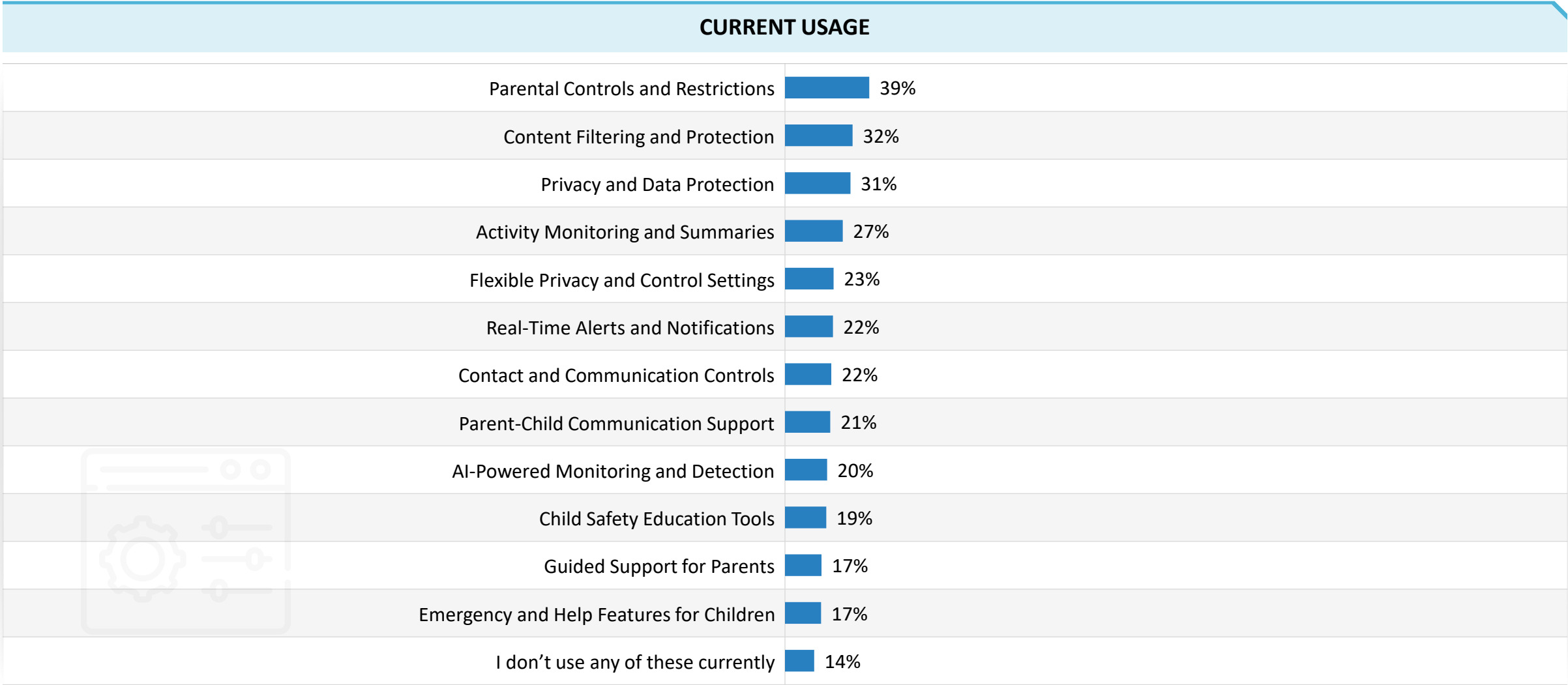


SOLUTION CREDIBILITY



Base: Total - 1014
V2. Which of the following do you think would work well and actually be effective at helping to keep your child safe online?

Just over a third of parents currently use parental controls and restrictions, and 1 in 7 do not use any of these



Base: Total - 1014
V3. Some of these are currently available in the market and some are not. Which of these do you use on a regular basis, if any?

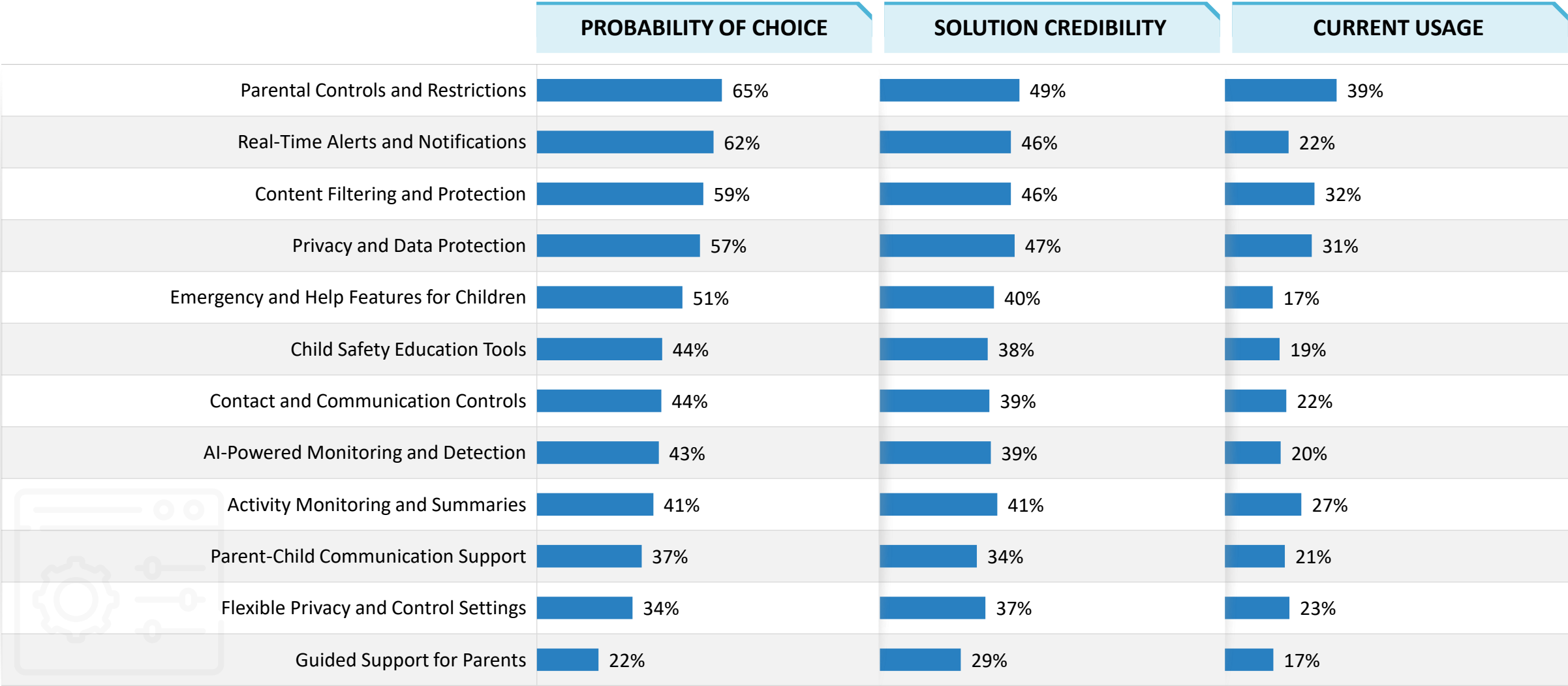
Tech experienced parents use several current solutions at higher rates than less tech savvy parents, especially parental controls, content filtering, and privacy and data protection tools

CURRENT USAGE			
		TECH EXPERIENCE	
		Experienced (A)	Inexperienced (B)
Parental Controls and Restrictions	 39%	45% B	27%
Content Filtering and Protection	 32%	36% B	22%
Privacy and Data Protection	 31%	35% B	22%
Activity Monitoring and Summaries	 27%	30% B	20%
Flexible Privacy and Control Settings	 23%	25% B	18%
Real-Time Alerts and Notifications	 22%	24%	20%
Contact and Communication Controls	 22%	22%	20%
Parent-Child Communication Support	 21%	21%	21%
AI-Powered Monitoring and Detection	 20%	20%	19%
Child Safety Education Tools	 19%	20%	17%
Guided Support for Parents	 17%	18%	16%
Emergency and Help Features for Children	 17%	17%	17%
I don't use any of these currently	 14%	12%	17% A

Letters in BLUE indicates significant difference at 95% confidence level

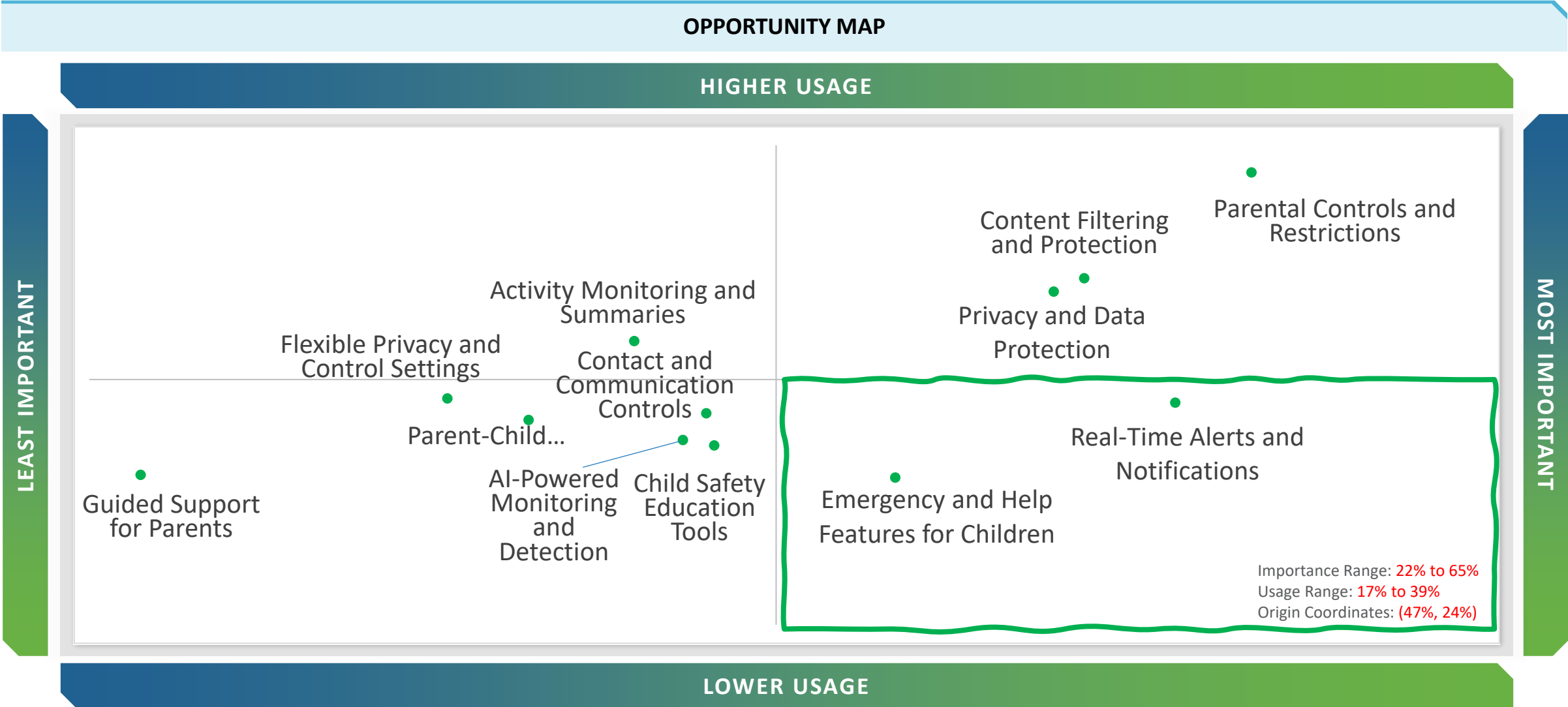
Base: Total - 1014, Tech Experience: Experienced - 689, Inexperienced - 325

V3. Some of these are currently available in the market and some are not. Which of these do you use on a regular basis, if any?



Base: Total - 1014
V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?, V2. Which of the following do you think would work well and actually be effective at helping to keep your child safe online?, V3. Some of these are currently available in the market and some are not. Which of these do you use on a regular basis, if any?

Three of the most important solutions are currently used most often, but two represent a potential unfilled need: real-time alerts / notifications and emergency / help features



Base: Total - 1014
V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?, V3. Some of these are currently available in the market and some are not. Which of these do you use on a regular basis, if any?

A latent class mixture model was used to identify clusters of solutions that are prioritized similarly

Manual / Parent Led



23%

Hands-On Control

Prefer a direct, parent-led approach to online safety, emphasizing controls, filtering, alerts, and active oversight.



Core mindset: Parents should be closely involved in managing and protecting their child's online environment.

53%

Balanced Safety

Favor a moderate and practical approach that balances protection with communication, education, and everyday usability.



Core mindset: Online safety is important, but solutions should support healthy family conversations and avoid feeling overly intrusive.

24%

Automated Protection

Strongly favor AI-powered monitoring and automated detection tools that proactively identify and stop online risks.

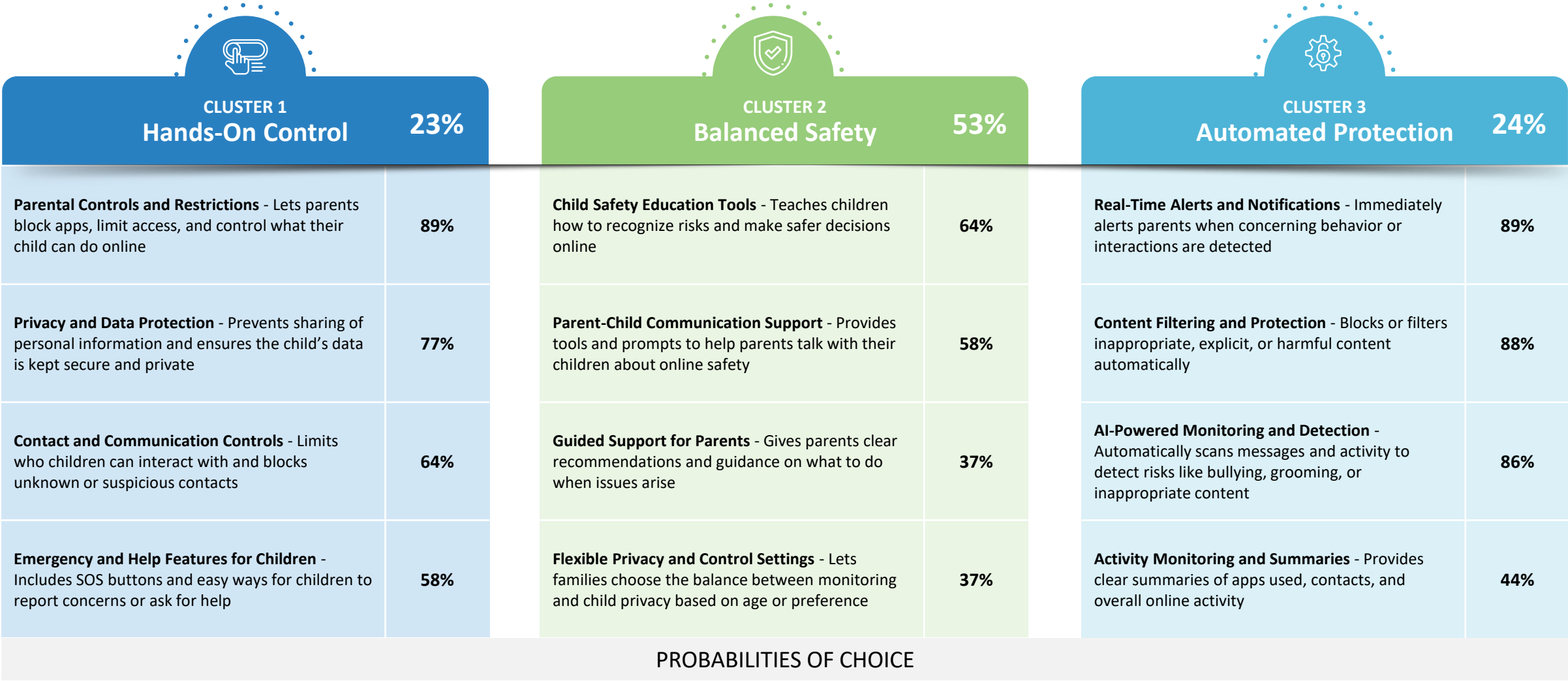


Core mindset: Technology should play an active role in detecting threats and protecting children online.

Automated / AI Powered



Solutions defining each cluster have much higher importance within the cluster than overall



Base: Total - 1014, Hands-on Control - 232, Balanced Safety - 539, Automated Protection - 243

The #1 solution among the Balanced Safety cluster is Child Safety Education Tools and #2 is Parent-Child Communication Support, quite different from the other clusters

PRIORITIZATION OF SOLUTIONS – PROBABILITY OF CHOICE - RANKING				
	TOTAL	Clusters		
		Hands-On Control	Balanced Safety	Automated Protection
Parental Controls and Restrictions	65%	1	5	4
Real-Time Alerts and Notifications	62%	2	7	1
Content Filtering and Protection	59%	3	11	2
Privacy and Data Protection	57%	4	4	6
Emergency and Help Features for Children	51%	6	3	8
Child Safety Education Tools	44%	9	1	10
Contact and Communication Controls	44%	5	12	5
AI-Powered Monitoring and Detection	43%	12	6	3
Activity Monitoring and Summaries	41%	7	8	7
Parent-Child Communication Support	37%	10	2	11
Flexible Privacy and Control Settings	34%	8	10	9
Guided Support for Parents	22%	11	9	12

RANKING

Base: Total - 1014, Hands-on Control - 232, Balanced Safety - 539, Automated Protection - 243
V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?

Indicates higher >4 in position between groups

The Balanced Safety cluster has a narrower range across solutions, with no standout strong or weak solutions; both of the other clusters have clearer priorities

PRIORITIZATION OF SOLUTIONS – PROBABILITY OF CHOICE

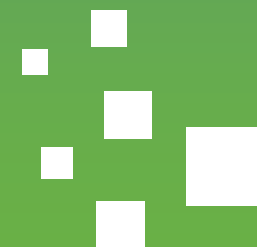
	TOTAL	Clusters		
		Hands-On Control	Balanced Safety	Automated Protection
Parental Controls and Restrictions	65%	89%	49%	77%
Real-Time Alerts and Notifications	62%	84%	40%	89%
Content Filtering and Protection	59%	82%	35%	88%
Privacy and Data Protection	57%	77%	53%	50%
Emergency and Help Features for Children	51%	58%	53%	41%
Child Safety Education Tools	44%	30%	64%	14%
Contact and Communication Controls	44%	64%	32%	50%
AI-Powered Monitoring and Detection	43%	0%	42%	86%
Activity Monitoring and Summaries	41%	40%	40%	44%
Parent-Child Communication Support	37%	22%	58%	3%
Flexible Privacy and Control Settings	34%	36%	37%	25%
Guided Support for Parents	22%	8%	37%	0%

Base: Total - 1014, Hands-on Control - 232, Balanced Safety - 539, Automated Protection - 243

V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?



Segmentation



SUMMARY: SEGMENTATION

The segments are differentiated less by whether parents recognize online risk and more by how they respond to it. Technology confidence, tool usage, communication, exploitation exposure and solution priorities separate the groups even when overall perceived risk is fairly similar.

Pragmatic Balancers are the largest segment—and arguably the biggest opportunity for intervention. At 41%, they want reasonable protection without intensive oversight, but are less technically capable, less active with tools and notably less prepared to respond to a serious incident.

More engaged parents achieve safety through different models. Engaged Protectors combine technology, communication and trust; Vigilant Managers lean more heavily into active control and monitoring; Social Risk Navigators focus disproportionately on who their child interacts with. This argues for personalized safety approaches rather than one prescriptive model for all families.

Analysis identified unique parent segments driven by 5 core dimensions

SEGMENTATION DIMENSIONS

Risk and Safety Orientation



Perceptions of online risk exposure

Focus on online safety focus

Tech Confidence and Controls



Tech savviness

Use of online safety tools

Online Exploitation Exposure



Perceived likelihood of exposure to sexual content or exploitation

Types of exposure to specific sexual content or exploitation

Solution Decision Priorities



Importance of factors when choosing apps / activities to allow online: Type, Reputation, Controls, Allowed Interactions, and Importance to Child

Communication and Engagement



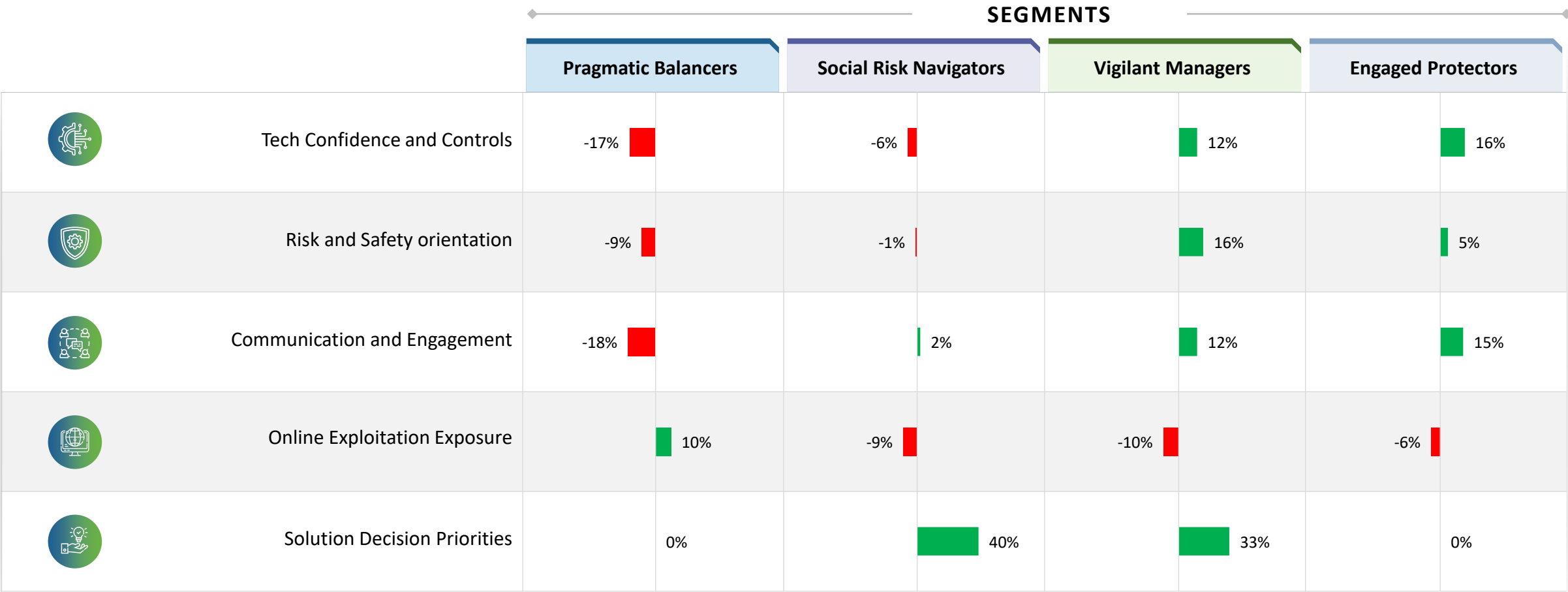
Approach to conversations about online safety

Likelihood child will come to them with concerns

What prompts conversations

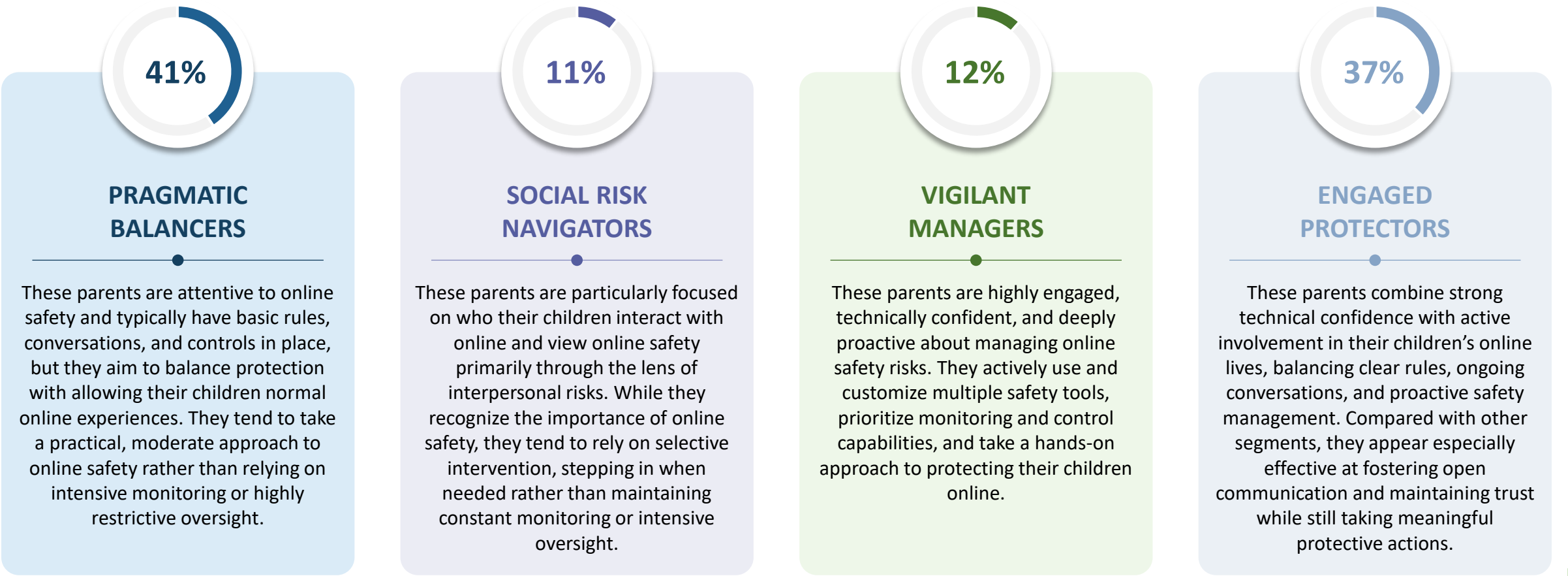
Segments differ based on their orientation to each of these dimensions

SEGMENTATION DIMENSIONS: VARIANCE FROM AVERAGE

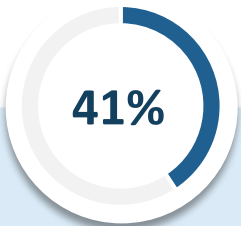


Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
T4. Which of the following best describes your experience with technology (e.g., devices, apps, settings)?, B1. Which of the following best describes your current use of tools to manage your children’s online activity?, T6. Overall, how much risk do you think your child(ren) is exposed to when online (using the internet, apps, smart devices, etc.)?, R1. Which of the following statements best reflects your views regarding online safety for your child(ren)?, B8. Which of the following statements best describes how you approach conversations about online safety with your child(ren)?, B9. How likely do you think your child(ren) is to come to you if they experience something concerning online?, B11. What prompts conversations about online safety with your child(ren)?, X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?, X3. To your knowledge, has your child(ren) ever experienced any of the following online?, R7. How important do you think each of the following factors are when it comes to choosing apps or other online activities used by children?

Meet the Segments: Segments differ on the key dimensions, as well as demographically, attitudinally and behaviorally

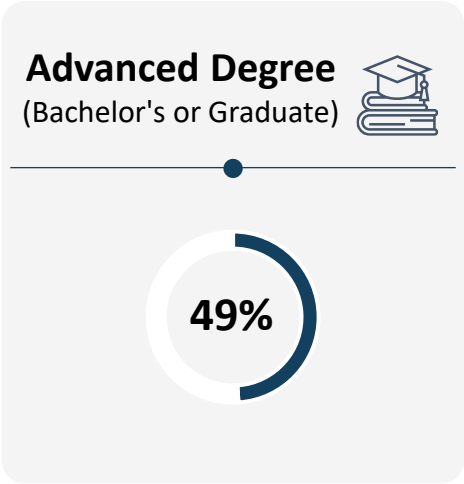
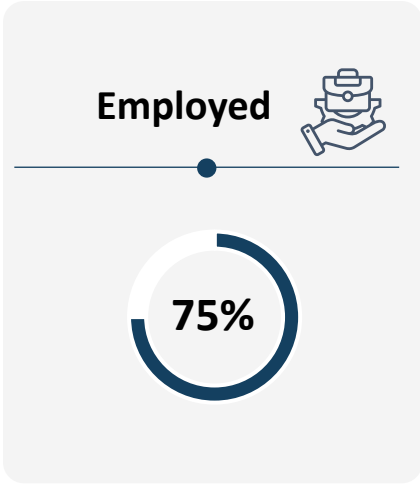
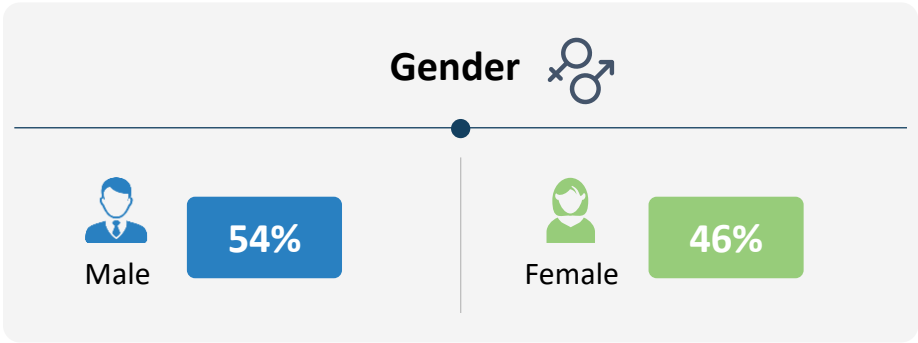


Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators – 108, Vigilant Managers - 117, Engaged Protectors - 376

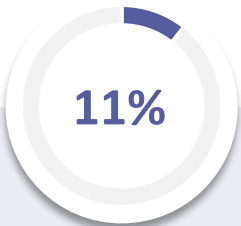


PRAGMATIC BALANCERS

These parents are attentive to online safety and typically have basic rules, conversations, and controls in place, but they aim to balance protection with allowing their children normal online experiences. They tend to take a practical, moderate approach to online safety rather than relying on intensive monitoring or highly restrictive oversight.

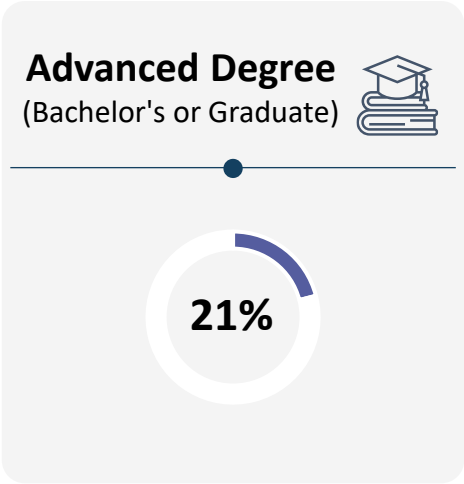
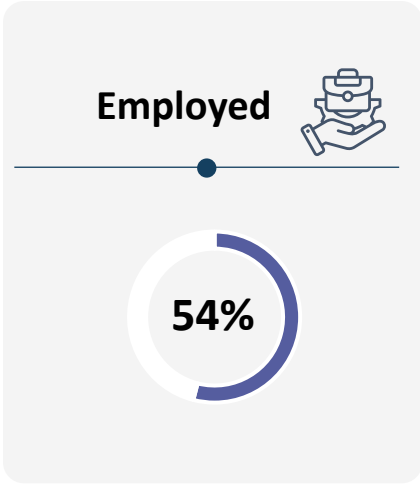
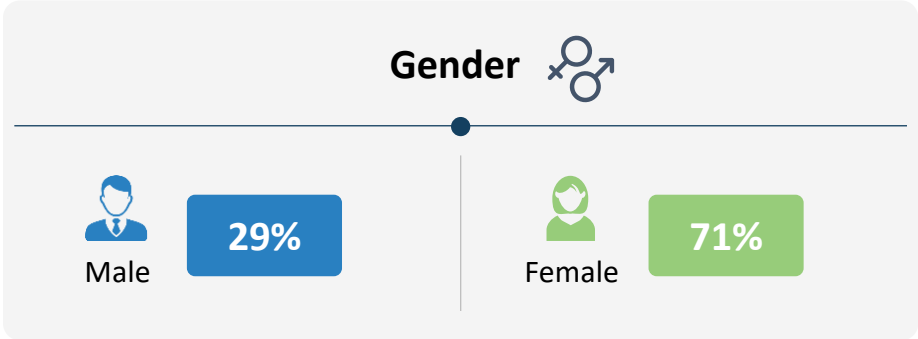


Segmentation Dimensions (Variance From Average)		
Tech Confidence and Controls	-17%	
Risk and Safety Orientation	-9%	
Communication and Engagement	-18%	
Online Exploitation Exposure	10%	
Solution Decision Priorities	0%	



SOCIAL RISK NAVIGATORS

These parents are particularly focused on who their children interact with online and view online safety primarily through the lens of interpersonal risks. While they recognize the importance of online safety, they tend to rely on selective intervention, stepping in when needed rather than maintaining constant monitoring or intensive oversight.

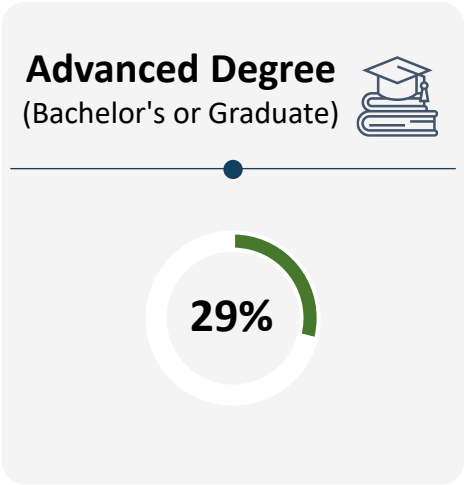
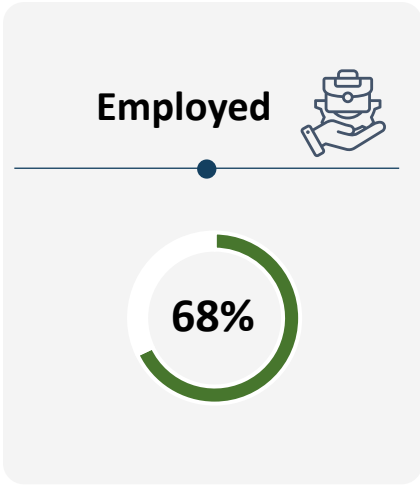
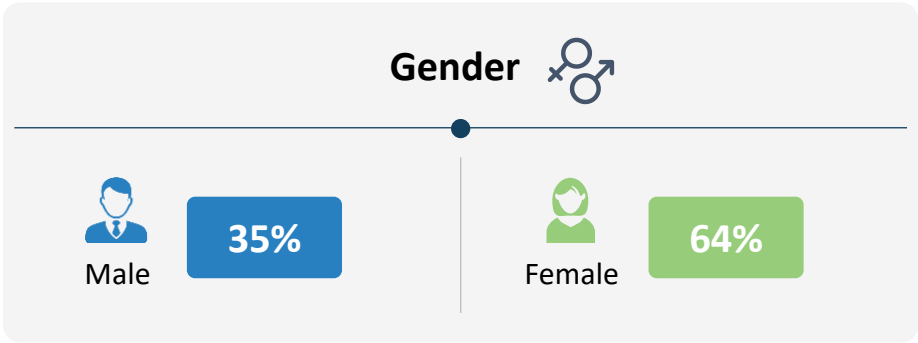


Segmentation Dimensions (Variance From Average)		
Tech Confidence and Controls	-6%	
Risk and Safety Orientation	-1%	
Communication and Engagement	2%	
Online Exploitation Exposure	-9%	
Solution Decision Priorities (Who Child can Interact with)		40%

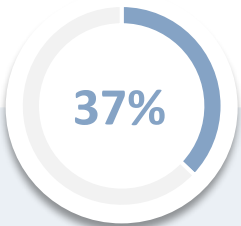


VIGILANT MANAGERS

These parents are highly engaged, technically confident, and deeply proactive about managing online safety risks. They actively use and customize multiple safety tools, prioritize monitoring and control capabilities, and take a hands-on approach to protecting their children online.

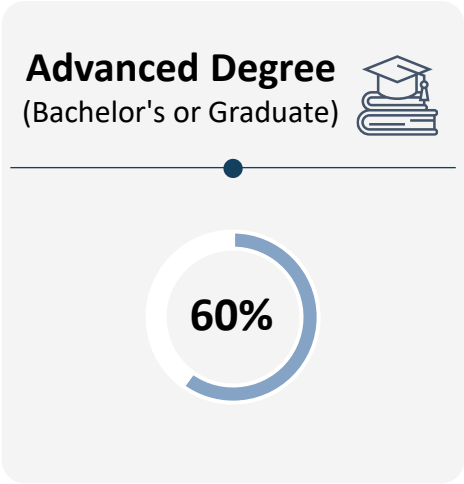
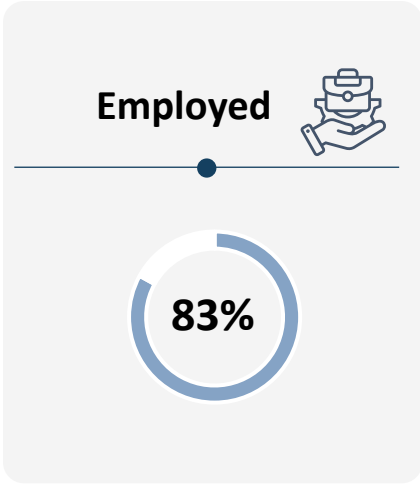
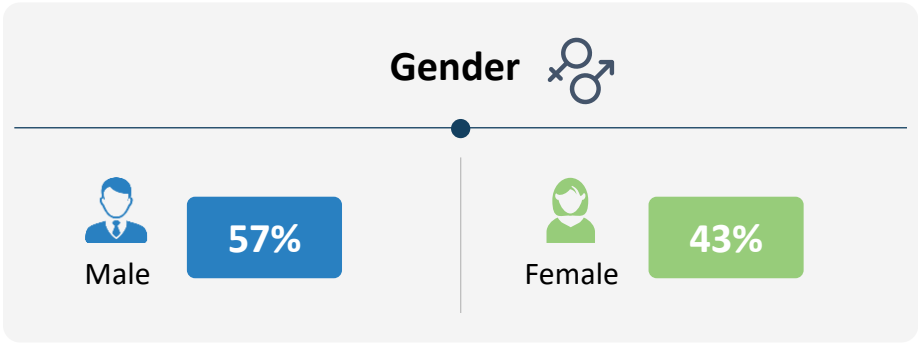


Segmentation Dimensions (Variance From Average)			
Tech Confidence and Controls			12%
Risk and Safety Orientation			16%
Communication and Engagement			12%
Online Exploitation Exposure	-10%		
Solution Decision Priorities (Control / Monitor Activity)			33%



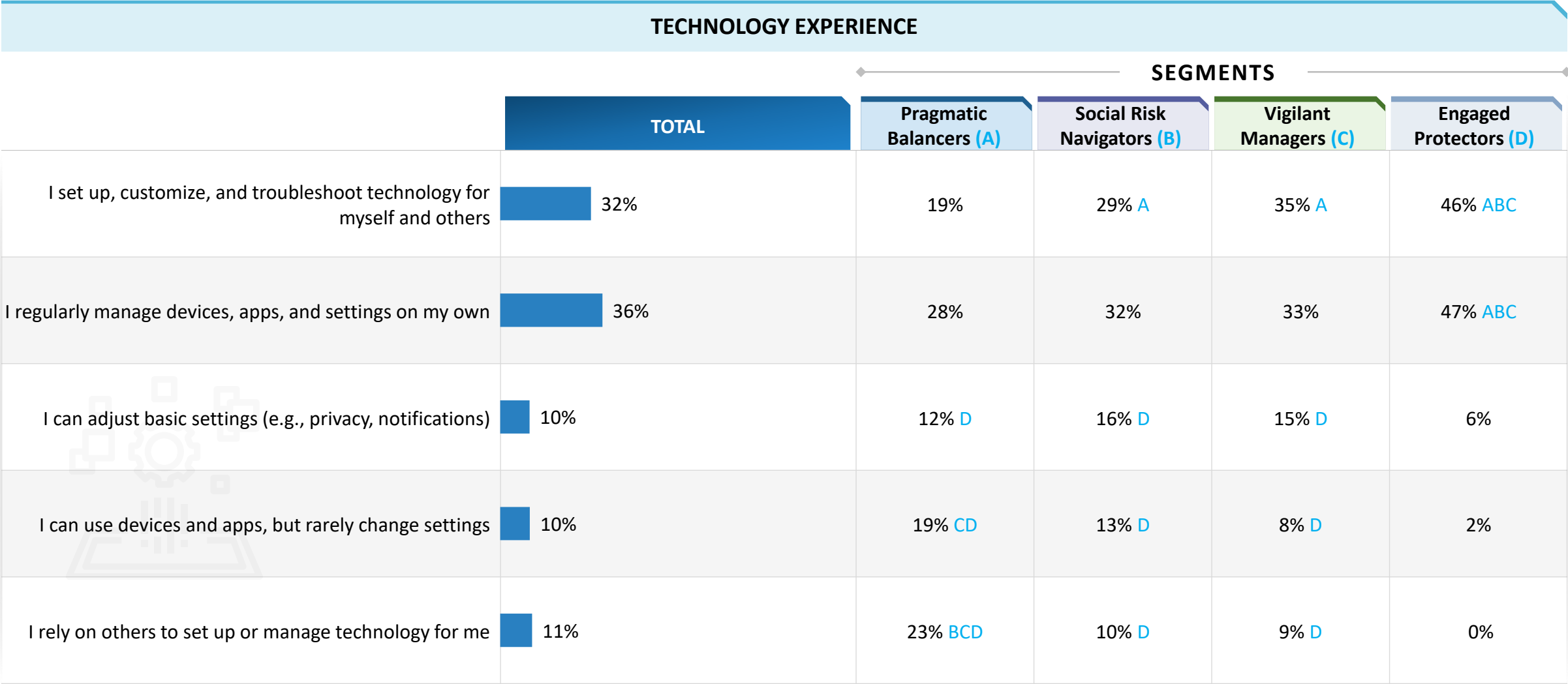
ENGAGED PROTECTORS

These parents combine strong technical confidence with active involvement in their children’s online lives, balancing clear rules, ongoing conversations, and proactive safety management. Compared with other segments, they appear especially effective at fostering open communication and maintaining trust while still taking meaningful protective actions.



Segmentation Dimensions (Variance From Average)		
Tech Confidence and Controls		16%
Risk and Safety Orientation		5%
Communication and Engagement		15%
Online Exploitation Exposure		-6%
Solution Decision Priorities		0%

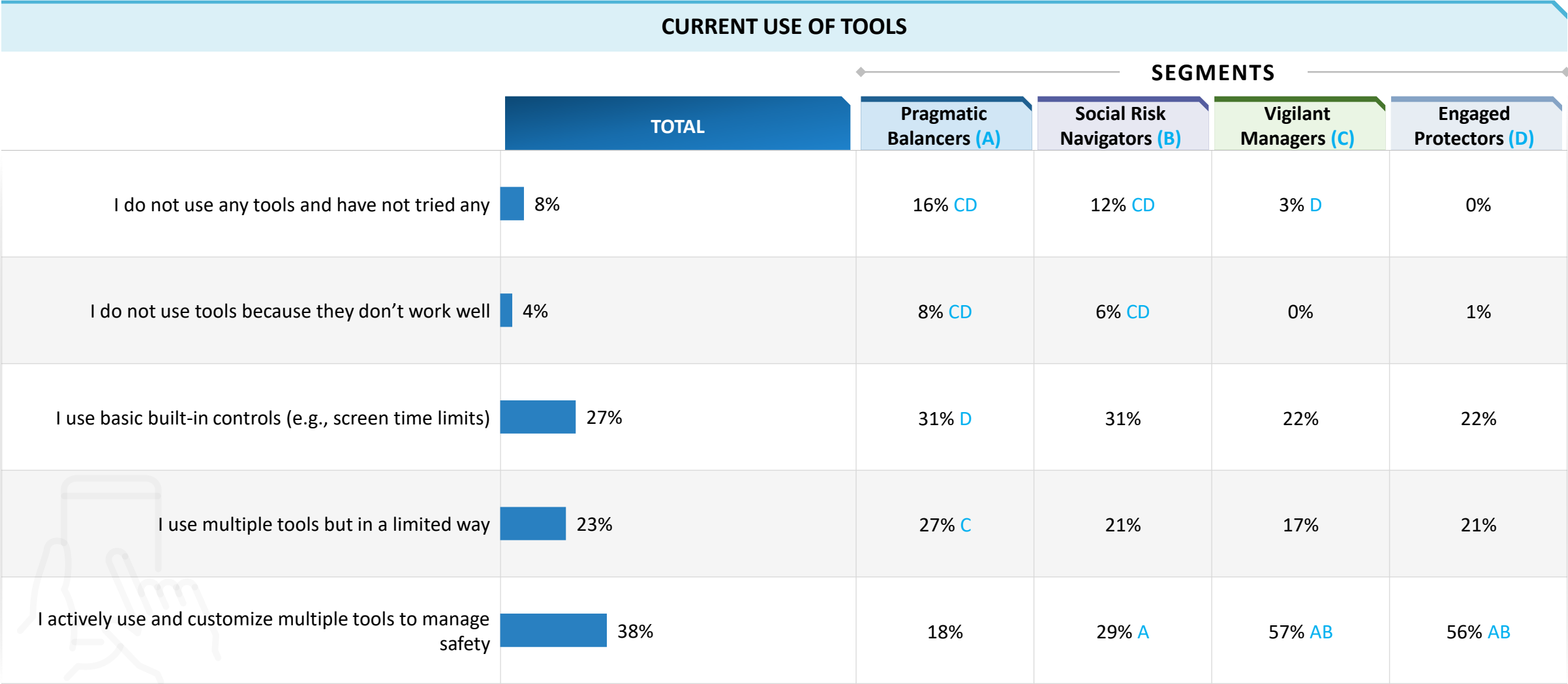
Engaged Protectors are highly confident managing technology, while Pragmatic Balancers feel least capable



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
T4. Which of the following best describes your experience with technology (e.g., devices, apps, settings)?

Letters in BLUE indicates significant difference at 95% confidence level

Vigilant Managers and Engaged Protectors actively use tools to manage their children’s online safety; Pragmatic Balancers are least likely to use any tools



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
B1. Which of the following best describes your current use of tools to manage your children’s online activity?

Letters in BLUE indicates significant difference at 95% confidence level

Segments have similar perceptions of the level of risk children are exposed to online, although a third of Vigilant Managers perceive low risk

PERCEPTION OF ONLINE RISK LEVEL					
	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Very High / High Risk	33%	33%	32%	38%	31%
Very high risk	10%	10%	7%	15%	9%
High risk	23%	23%	25%	24%	22%
Moderate risk	46%	50% C	44% C	30%	48% C
Low risk	15%	12%	18%	20%	17% A
Very low risk	6%	5%	6%	12% AD	4%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
T6. Overall, how much risk do you think your child(ren) is exposed to when online (using the internet, apps, smart devices, etc.)?

Letters in BLUE indicates significant difference at 95% confidence level

When asked unprompted, Pragmatic Balancers mention fewer risk concerns overall; while Engaged Protectors are especially focused on several: harassment, deception, and privacy



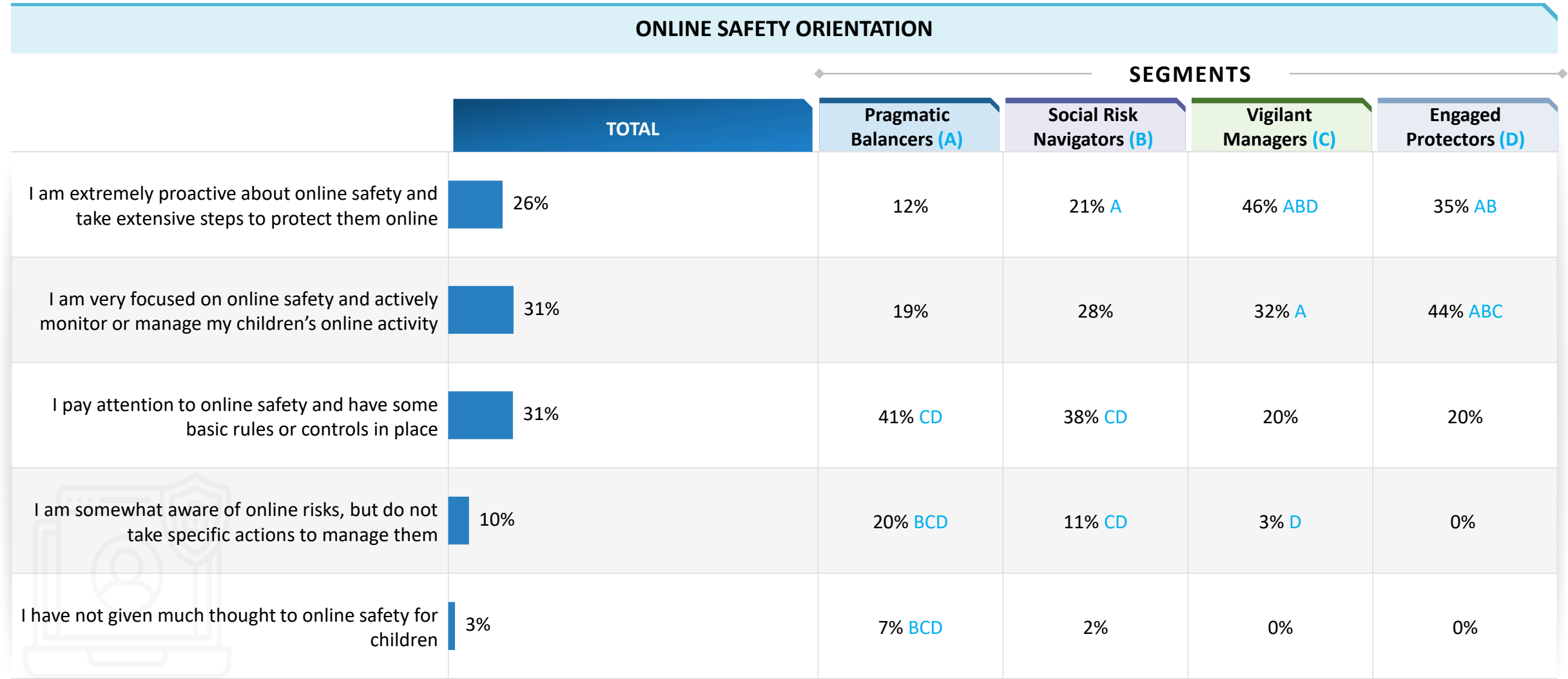
Verbatim Analysis: Types of Risk					
		Segments			
		Total	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)
Sexual Exploitation & Sexual Content	52%	46%	60% A	59% A	53%
Harassment, Toxicity & Hateful Content	33%	28%	25%	33%	40% AB
Harmful Content Exposure	18%	16%	13%	19%	21% B
Deception & Financial Exploitation	17%	16% B	8%	11%	22% ABC
Privacy, Device Security & Surveillance	14%	13%	8%	9%	18% ABC
Psychosocial & Developmental Impacts	7%	8% B	1%	7% B	9% B
Parental Perceptions & Mitigation Behaviors	5%	6%	6%	8%	4%
Offline Escalation & Physical Safety Threats	3%	4%	6%	4%	2%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

T7. What type of risks do you think your child(ren) could be exposed to when online?

Letters in BLUE indicates significant difference at 95% confidence level

Segments differ on their level of proactivity when it comes to managing their children's online safety, spanning highly proactive among Vigilant Managers to least proactive among Pragmatic Balancers



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
R1. Which of the following statements best reflects your views regarding online safety for your child(ren)?

Letters in BLUE indicates significant difference at 95% confidence level

When it comes to speaking with their children about online safety, Pragmatic Balancers are much more likely to only step in when issues arise

CONVERSATION APPROACH		SEGMENTS			
	TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
I set clear rules and expectations about what is allowed	36%	22%	39% A	49% A	48% A
I have open conversations and encourage them to make good decisions	28%	30%	27%	27%	27%
I monitor and guide their behavior as needed	20%	24% D	25% D	19%	15%
I mainly step in when issues arise	9%	16% BCD	6% C	0%	5% C
I rely on my child(ren) to manage their own behavior	4%	5% B	1%	2%	5% B
I do not typically address this directly	2%	3% D	3% D	3% D	0%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
 B8. Which of the following statements best describes how you approach conversations about online safety with your child(ren)?

Letters in BLUE indicates significant difference at 95% confidence level

Segments also differ in how likely their kids are to come to them if they have an issue online, with nearly all Vigilant Managers and Engaged Protectors believing they would



LIKELIHOOD TO COME TO PARENT WITH ISSUE					
	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Definitely / Probably would come	76%	57%	70% A	90% AB	93% AB
They would definitely come to me	47%	27%	46% A	68% AB	62% AB
They would probably come to me	29%	30%	24%	22%	31%
They might come to me	15%	28% BCD	18% D	9% D	3%
They would probably not come to me	5%	10% CD	7% CD	1%	1%
They would definitely not come to me	4%	5% C	5% C	0%	3% C

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

B9. How likely do you think your child(ren) is to come to you if they experience something concerning online?

Letters in BLUE indicates significant difference at 95% confidence level

Engaged Protectors are prompted to have conversations with their kids for a wide range of reasons and half say their kids bring it up

WHAT PROMPTS CONVERSATIONS

	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Routine parenting conversations	49%	30%	52% A	53% A	67% ABC
My child brings it up / has questions	44%	39%	39%	38%	54% ABC
Something I saw in the news or media	41%	34%	39%	32%	52% ABC
Something that happened to another child	31%	29%	34%	29%	33%
Something that happened to my child	22%	24% C	18%	15%	24% C
School or external guidance	22%	22% BC	8%	12%	30% ABC
I don't typically initiate these conversations	9%	14% CD	13% CD	5%	4%
Something else	1%	0%	0%	3% AB	1%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

B11. What prompts conversations about online safety with your child(ren)?

Vigilant Managers are split on how likely it is their children will be exposed to inappropriate or exploitive experiences, with a third believing it’s not likely; the majority of other segments think it’s more likely than not

LIKELIHOOD CHILDREN WILL ENCOUNTER INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES					
	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Has Happened / Extremely / Very Likely	38%	40% B	25%	42% B	39% B
This has already happened to my child	2%	0%	5% AD	13% ABD	0%
Extremely likely	17%	20% B	6%	14% B	19% B
Very likely	19%	20%	15%	15%	20%
Somewhat likely	33%	35% C	41% C	15%	33% C
Not very likely	18%	16%	21%	16%	19%
Not likely at all	11%	8%	13%	26% ABD	9%



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?

Letters in BLUE indicates significant difference at 95% confidence level

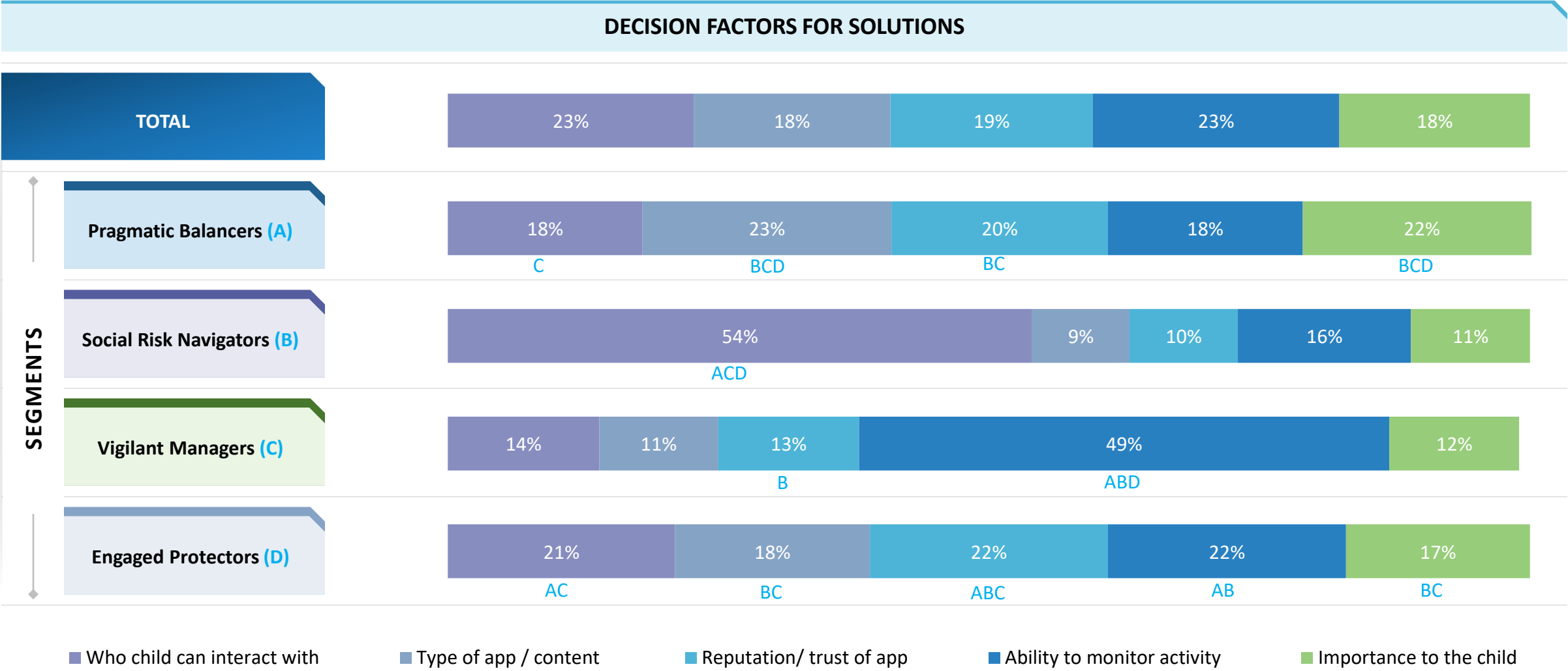
Pragmatic Balancers are most likely to have children who have been exposed to inappropriate content or exploitive online behaviors

Types of Inappropriate or Exploitive Online Experience Exposure					
		Segments			
		Total	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)
Interacted with someone who later seemed suspicious or not who they claimed to be	21%	22% C	18%	13%	24% C
Been contacted in a way that made them feel uncomfortable or unsafe	19%	21%	15%	16%	19%
Been asked to keep an online interaction secret from parents or adults	17%	20% BC	12%	11%	16%
Received or been shown inappropriate sexual images or content	17%	19% B	10%	21% B	15%
Been asked to share inappropriate sexual photos or videos of themselves	15%	16% B	7%	14%	17% B
Received threats of harm or disclosure if they did not share / do something explicit	15%	20% BCD	6%	9%	13% B
Been asked to share inappropriate sexual photos or videos of other children	13%	16% BC	6%	7%	14% BC
No – my child has not experienced any of these online	43%	33%	53% A	54% A	49% A
Don't know / not sure	6%	7%	6%	7%	4%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
X3. To your knowledge, has your child(ren) ever experienced any of the following online?

Letters in BLUE indicates significant difference at 95% confidence level

Segments differ strongly on what they prioritize when it comes to which apps or online activities to allow their children to use



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
R7. How important do you think each of the following factors are when it comes to choosing apps or other online activities used by children?

Letters in BLUE indicates significant difference at 95% confidence level

Vigilant Managers are very clear on the solutions that are and are not important to them, with some solutions having high interest and some low, while Pragmatic Balancers have more similar levels of interest across solutions

PRIORITIZATION OF SOLUTIONS – PROBABILITY OF CHOICE

	TOTAL	SEGMENTS			
		Pragmatic Balancers	Social Risk Navigators	Vigilant Managers	Engaged Protectors
Parental Controls and Restrictions	65%	58%	70%	79%	67%
Real-Time Alerts and Notifications	62%	57%	63%	76%	63%
Content Filtering and Protection	59%	52%	63%	70%	61%
Privacy and Data Protection	57%	55%	55%	57%	61%
Emergency and Help Features for Children	51%	51%	54%	52%	50%
Child Safety Education Tools	44%	49%	43%	32%	43%
Contact and Communication Controls	44%	38%	60%	51%	44%
AI-Powered Monitoring and Detection	43%	42%	42%	43%	44%
Activity Monitoring and Summaries	41%	44%	37%	37%	41%
Parent-Child Communication Support	37%	43%	34%	28%	34%
Flexible Privacy and Control Settings	34%	36%	29%	32%	34%
Guided Support for Parents	22%	25%	19%	15%	21%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?

Despite differing levels of interest between segments, the rank order of solutions is similar across segments

PRIORITIZATION OF SOLUTIONS – PROBABILITY OF CHOICE - RANKING

		SEGMENTS				RANKING
	TOTAL	Pragmatic Balancers	Social Risk Navigators	Vigilant Managers	Engaged Protectors	
Parental Controls and Restrictions	65%	1	1	1	1	
Real-Time Alerts and Notifications	62%	2	3	2	2	
Content Filtering and Protection	59%	4	2	3	3	
Privacy and Data Protection	57%	3	5	4	4	
Emergency and Help Features for Children	51%	5	6	5	5	
Child Safety Education Tools	44%	6	7	9	8	
Contact and Communication Controls	44%	10	4	6	7	
AI-Powered Monitoring and Detection	43%	9	8	7	6	
Activity Monitoring and Summaries	41%	7	9	8	9	
Parent-Child Communication Support	37%	8	10	11	10	
Flexible Privacy and Control Settings	34%	11	11	10	11	
Guided Support for Parents	22%	12	12	12	12	

Indicates higher >4 in position between groups

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

V1. When it comes to solutions to help keep your child(ren) safe online... Which are you MOST INTERESTED in?... Which are you LEAST INTERESTED in?

However, when aligning the segments with the solution clusters, the majority of Pragmatic Balancers prioritize Balanced Safety solutions

SOLUTION CLUSTERS						
		SEGMENTS				
		TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
	Hands-on Control	23%	16%	25% A	30% A	28% A
	Balanced Safety	53%	66% BCD	45%	38%	46%
	Automated Protection	24%	18%	30% A	32% A	26% A

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

Engaged Protectors are most likely to use these solutions currently

CURRENT SOLUTION USAGE					
		SEGMENTS			
		TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)
Parental Controls and Restrictions	39%	26%	38% A	49% A	52% AB
Content Filtering and Protection	32%	24%	26%	38% A	40% AB
Privacy and Data Protection	31%	19%	27%	37% A	42% AB
Activity Monitoring and Summaries	27%	22%	16%	26%	36% ABC
Flexible Privacy and Control Settings	23%	20%	20%	21%	27% A
Real-Time Alerts and Notifications	22%	17%	20%	23%	28% A
Contact and Communication Controls	22%	20%	16%	29% AB	23%
Parent-Child Communication Support	21%	19%	16%	14%	27% ABC
AI-Powered Monitoring and Detection	20%	20%	13%	15%	22% B
Child Safety Education Tools	19%	19% B	11%	21%	22% B
Guided Support for Parents	17%	17% C	11%	9%	21% BC
Emergency and Help Features for Children	17%	17%	14%	13%	18%
I don't use any of these currently	14%	16% D	20% D	12%	9%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
V3. Some of these are currently available in the market and some are not. Which of these do you use on a regular basis, if any?

Among challenges, Pragmatic Balancers are most likely to say they trust their children to manage themselves; Engaged Protectors say they need to balance privacy with monitoring, and kids resisting / finding ways around controls

ONLINE SAFETY MANAGEMENT CHALLENGES

		SEGMENTS			
	TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Balancing my child’s privacy with monitoring	36%	33%	33%	27%	43% AC
My child thinks it’s unfair since friends / other siblings do not have the same oversight	26%	25%	18%	29% B	30% B
Children resist or find ways around controls	26%	24%	22%	20%	31% AC
I trust my children to manage themselves	26%	32% BCD	19%	20%	24%
Lack of knowledge about available tools	19%	18%	19%	15%	20%
Too time-consuming to monitor / manage	19%	20% C	13%	7%	23% BC
Differences in opinion with other adults managing their safety	17%	17%	16%	16%	17%
Tools are too complicated to set up or use	15%	17% C	11%	9%	16% C
Lack of effective tools	14%	15%	11%	13%	15%
Unsure what risks to prioritize	13%	13% C	12%	6%	16% C
None – no challenges	17%	11%	19% A	29% AD	18% A

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

B2. What are the main challenges you face in managing your children's online safety?

Engaged Protectors and Vigilant Managers take a wide range of steps to manage their children's online safety; Pragmatic Balancers are least likely to monitor usage

ONLINE SAFETY MANAGEMENT ACTIONS TAKEN

	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Talk regularly with my children about online safety	45%	33%	43%	50% A	56% AB
Require my children to get my approval before downloading apps or making purchases	41%	32%	39%	44% A	50% AB
Set rules about which apps, games, or websites are allowed	37%	26%	36%	44% A	48% AB
Monitor my children's browsing or app usage	37%	26%	38% A	47% A	45% A
Use parental control software or apps	36%	23%	31%	50% AB	48% AB
Set rules about when or how long my child can be online	34%	25%	29%	41% A	44% AB
Use built-in device controls (e.g., screen time, app restrictions)	33%	24%	27%	36% A	44% AB
Check my children's social media activity	33%	24%	31%	37% A	42% AB
Restrict or disable certain features (e.g., chat, location sharing)	33%	24%	33%	48% AB	38% A
Check my children's messages	31%	24%	33%	43% A	35% A
Use content filters or safe search settings	29%	20%	20%	38% AB	39% AB
Keep devices in shared / common areas of the home	26%	21%	20%	26%	35% AB
None – I don't currently take any specific actions	6%	8% D	6% D	9% D	1%

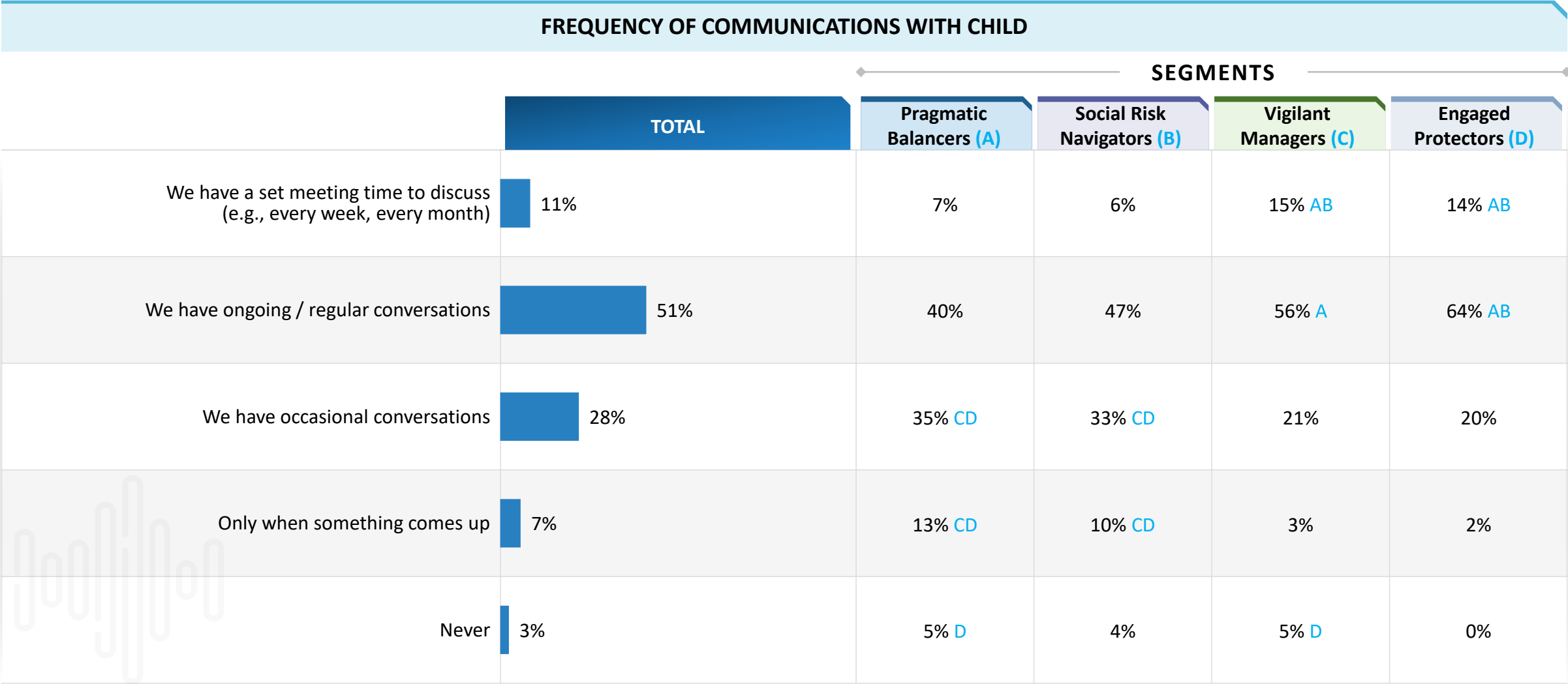
Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

B4. Which of the following actions, if any, do you currently take to manage your children's online safety?

While all segments say they have regular or set times when they discuss online safety with their children, about half of Social Risk Navigators and Practical Balancers only discuss it occasionally, when something comes up, or never





Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

B6. How often do you talk with your child(ren) about online safety and appropriate online behavior?

Letters in BLUE indicates significant difference at 95% confidence level

Pragmatic Balancers discuss fewer topics than other segments; Vigilant Managers are more likely to discuss sharing personal content and Engaged Protectors to discuss scams / fake messages and suspicious links

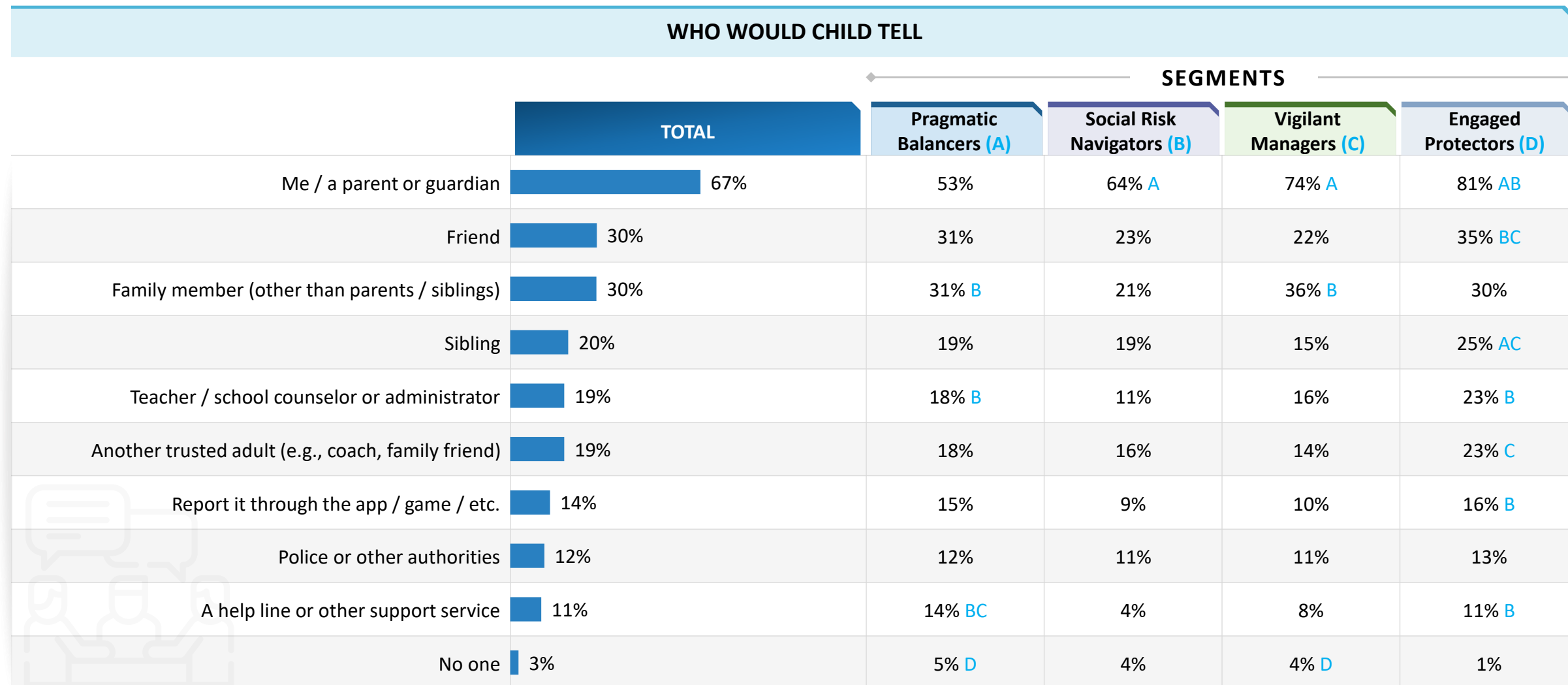
TOPICS DISCUSSED WITH CHILD					
	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Being cautious when interacting with strangers online	49%	35%	53% A	60% A	59% A
Talking to me or another trusted adult if something feels wrong	48%	34%	54% A	56% A	60% A
Not sharing personal information	46%	31%	54% A	61% A	56% A
Recognizing scams, fake messages, or suspicious links	45%	34%	44%	46% A	57% ABC
Risks of sharing photos, videos, or personal content	45%	31%	44% A	59% AB	56% AB
Risks of people pretending to be someone else	44%	31%	45% A	53% A	54% A
What to do if they see inappropriate or upsetting content	44%	32%	47% A	53% A	52% A
The importance of privacy settings and account security	42%	32%	44% A	43% A	52% A
Managing screen time or balancing online / offline activities	41%	30%	37%	48% A	53% AB
How to handle bullying or negative interactions online	41%	30%	43% A	40% A	53% AC
Being respectful to others online	40%	32%	48% A	41%	47% A
I have not discussed online safety topics with my child(ren)	2%	3% D	2%	4% D	0%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

B7. Which of the following topics, if any, have you discussed with your child(ren) regarding online safety?

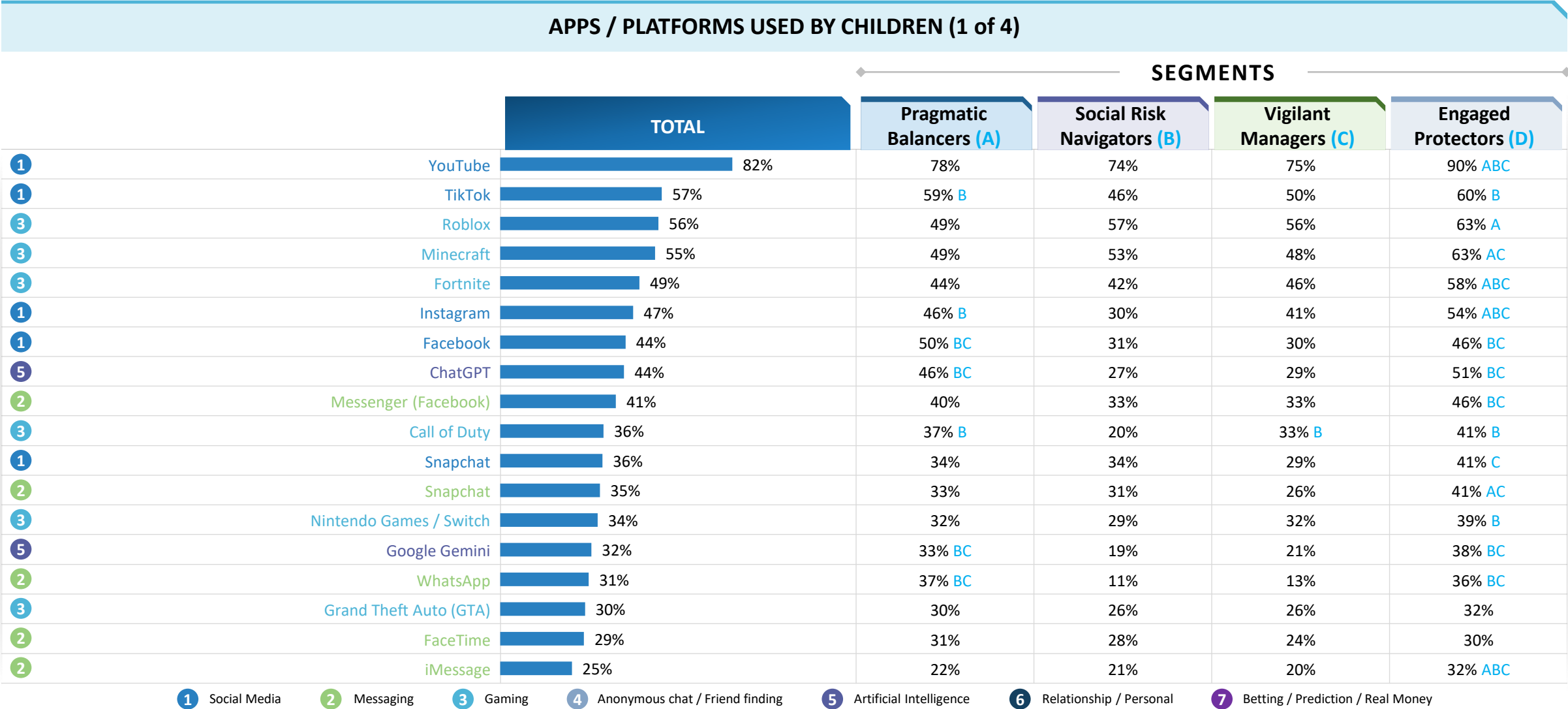
Only half of Pragmatic Balancers think their child would tell them if they experienced something concerning online



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
 B10. If your child(ren) experienced something concerning online, who do you think they are most likely to tell?

Letters in BLUE indicates significant difference at 95% confidence level

Children of Engaged Protectors have highest usage of the most popular apps, while those of Vigilant Managers and Social Risk Navigators use the least



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
U2b – U20b. Which of these does your child(ren) use on a regular basis?
Letters in BLUE indicates significant difference at 95% confidence level

Among the less-used apps overall, Pragmatic Balancers state that their kids are using several at higher rates than other segments

APPS / PLATFORMS USED BY CHILDREN (2 of 4)

			SEGMENTS			
		TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
2	Discord	17%	15%	11%	12%	21% ABC
1	X (Twitter)	17%	19% BC	6%	9%	19% BC
3	Among Us	16%	16%	12%	19%	17%
5	Microsoft Copilot	14%	16% BC	7%	6%	17% BC
1	Pinterest	14%	12%	11%	12%	17%
2	Google Meet	14%	15%	10%	12%	14%
1	Twitch	12%	13%	12%	10%	12%
2	Telegram	11%	16% BCD	4%	2%	11% BC
5	Snapchat My AI	11%	11%	6%	6%	14% BC
7	DraftKings	10%	16% BCD	5%	4%	7%
3	Steam	10%	10% C	10% C	3%	12% C
7	FanDuel	9%	13% BCD	3%	7%	8% B
1	Reddit	9%	10% B	5%	5%	10%
1	Threads	8%	8% B	2%	4%	11% BC
5	Claude	7%	7% B	1%	4%	11% BC
7	BetMGM	7%	9% BC	3%	4%	7% B
4	Whisper	7%	9% B	4%	7%	6%

1 Social Media 2 Messaging 3 Gaming 4 Anonymous chat / Friend finding 5 Artificial Intelligence 6 Relationship / Personal 7 Betting / Prediction / Real Money

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
U2b - U20b. Which of these does your child(ren) use on a regular basis?

Letters in BLUE indicates significant difference at 95% confidence level

Vigilant Managers and Social Risk Navigators claim lower usage among their children in this tier of apps also

APPS / PLATFORMS USED BY CHILDREN (3 of 4)

		SEGMENTS				
		TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
4	Monkey	7%	9% BC	3%	3%	6% C
5	CapCut AI tools	6%	7% B	2%	4%	8% B
4	Kik	6%	7% C	5%	1%	6% C
4	Yubo	6%	6% BC	2%	2%	7% BC
6	Tinder	5%	8% CD	5%	3%	4%
5	Character.AI	5%	5% C	4%	2%	7% C
6	Coffee Meets Bagel	5%	8% BCD	3%	3%	4%
4	Wink	5%	7% BC	2%	3%	5%
7	Caesars Sportsbook	5%	7% C	3%	3%	5%
7	Polymarket	5%	5% B	2%	3%	6% B
4	OmeTV	5%	6%	4%	3%	4%
6	OnlyFans	4%	7% BCD	3%	2%	3%
4	Emerald Chat	4%	5%	3%	3%	5%
6	Bumble	4%	6% B	1%	3%	4% B
7	Kalshi	4%	7% BCD	1%	2%	3%
4	Wizz	4%	6% C	3%	1%	3%
6	Badoo	4%	4%	3%	3%	4%

1 Social Media 2 Messaging 3 Gaming 4 Anonymous chat / Friend finding 5 Artificial Intelligence 6 Relationship / Personal 7 Betting / Prediction / Real Money

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
U2b – U20b. Which of these does your child(ren) use on a regular basis?

Letters in BLUE indicates significant difference at 95% confidence level

In the bottom tier of app usage, Pragmatic Balancers state higher usage of several apps than other segments, especially Hinge and Plenty of Fish

APPS / PLATFORMS USED BY CHILDREN (4 of 4)

			SEGMENTS				
			TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
6	Hinge	4%	4%	7% BCD	0%	1%	2%
6	Match	4%	4%	5% C	4%	1%	3%
6	Plenty of Fish	4%	4%	5% BC	1%	2%	3%
6	OkCupid	3%	3%	4% B	1%	3%	2%
4	Tor / Onion Browser	3%	3%	3% C	1%	0%	4% BC
6	Grindr	3%	3%	4% B	1%	2%	2%
5	Midjourney	3%	3%	4% BC	0%	0%	3% BC
5	DALL-E	2%	2%	3% C	3% C	0%	3% C
1	Lemon8	2%	2%	1%	2%	2%	3%
1	Tumblr	2%	2%	2%	1%	1%	2%
5	Replika	2%	2%	2%	2%	0%	2%
1	Kick	2%	2%	1%	1%	0%	2%
2	Signal	2%	2%	2%	2%	0%	2%
5	Janitor AI	2%	2%	2%	0%	0%	2%
2	Marco Polo	1%	1%	1%	3% C	0%	2%
5	Stable Diffusion	1%	1%	2%	0%	1%	2%
1	BeReal	1%	1%	1%	0%	1%	1%

1 Social Media 2 Messaging 3 Gaming 4 Anonymous chat / Friend finding 5 Artificial Intelligence 6 Relationship / Personal 7 Betting / Prediction / Real Money

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
U2b – U20b. Which of these does your child(ren) use on a regular basis?

Letters in BLUE indicates significant difference at 95% confidence level

Reasons parents allow the use of risky apps vary: half of Vigilant Managers and Engaged Protectors say they trust their child; Engaged Protectors also say it's important for social reasons and to help them learn how to navigate safely

REASONS FOR ALLOWING RISKY APP / PLATFORM USAGE

		SEGMENTS			
	TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
I trust my child to make good decisions	44%	38%	38%	50% A	51% AB
I rely on parental controls or safety tools to reduce risks	33%	24%	33%	43% A	39% A
We can manage the risks	32%	26%	24%	32%	40% AB
It helps them learn to navigate the online world safely	28%	26%	18%	20%	35% ABC
It’s important for socializing with friends	26%	25% B	12%	21%	34% ABC
I want to respect their independence or privacy	25%	26%	20%	18%	27% C
Most kids their age are using them	25%	24% B	12%	18%	31% ABC
They need it for school or other activities	23%	22%	16%	25%	24% B
It keeps them entertained or occupied	21%	22% C	19% C	9%	23% C
It’s hard to monitor / control everything they do online	17%	19%	12%	17%	17%
The benefits outweigh the risks	15%	15% C	12%	6%	19% C
They’ll be exposed to these risks eventually anyway	14%	19% BCD	7%	6%	12% C
They would feel left out if they didn’t use them	14%	16% BC	8%	9%	14%
The risks are not that serious for my child	11%	13% B	5%	8%	12% B
I’m not sure how safe or risky they are	6%	9% BCD	4%	1%	6% C
I do not allow any risky apps or platforms	10%	9%	11%	16% D	8%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

U22. What are the main reasons you allow your child(ren) to use apps or platforms that have some risk related to their online safety?

Parents across segments generally feel all of these risks are likely

RISK LIKELIHOOD (VERY / EXTREMELY LIKELY / CHILDREN HAS ALREADY EXPERIENCED)

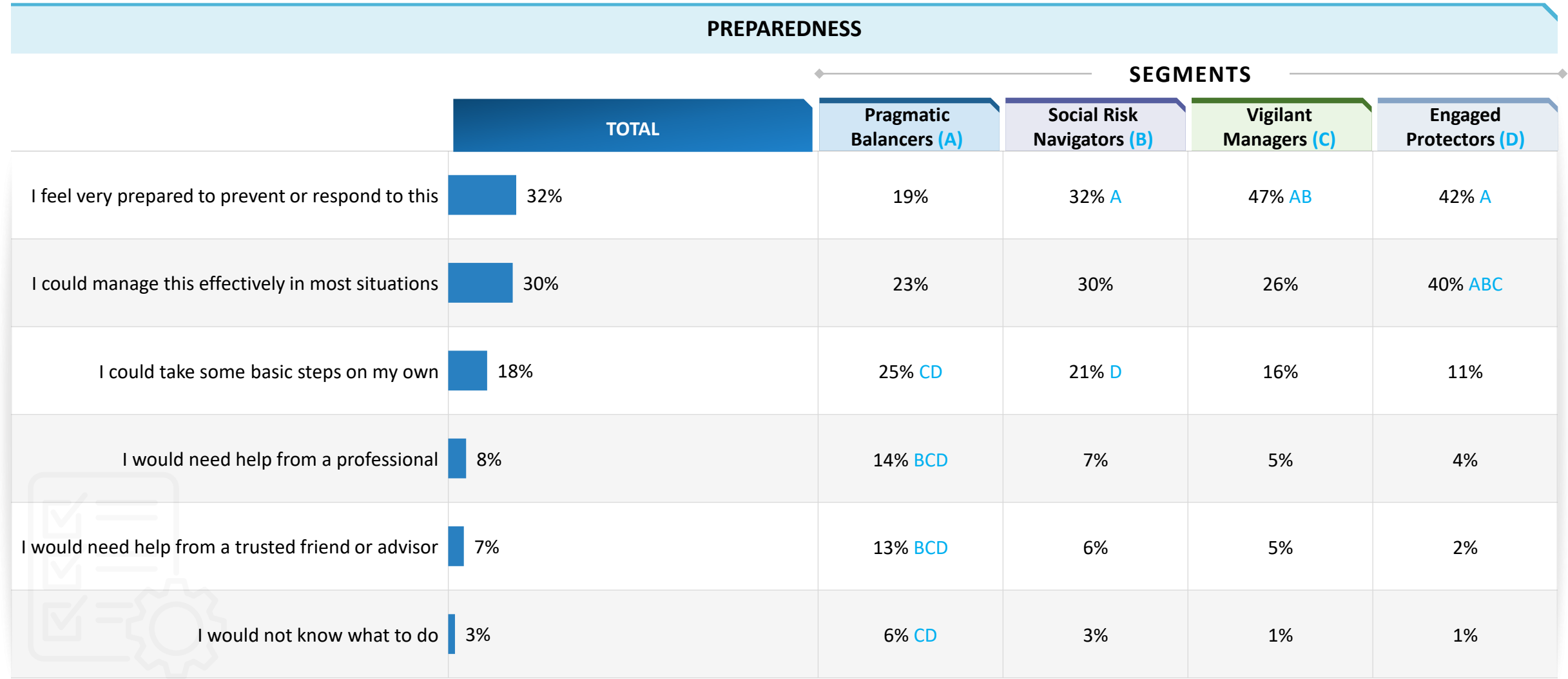
	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Excessive screen time or unhealthy usage habits	46%	46%	52% C	37%	46%
Exposure to content that is simply too mature for their age	44%	45%	47%	38%	45%
Collection and use of personal data by apps or platforms	44%	46%	47%	37%	44%
Exposure to inappropriate or explicit content	44%	42%	45%	35%	47% C
Exposure to misleading or harmful information	43%	44%	45%	40%	43%
Online predators or grooming	42%	43%	46% C	33%	42%
Difficulty controlling or limiting online activity (e.g., addictive use)	41%	44% C	40%	28%	42% C
Being contacted by strangers or people misrepresenting who they are	40%	40%	44%	34%	41%
Scams, fraud, or phishing	39%	42%	36%	35%	39%
Cyberbullying or harassment	39%	42% C	44% C	32%	37%
Exposure to harmful communities or content (e.g., self-harm, extremism)	39%	43% CD	39%	32%	36%
Sharing location information	39%	39% C	38%	28%	41% C
Pressure from peers or others to engage in risky behavior	38%	41%	33%	33%	38%
Sharing their personal information with strangers	36%	41% C	33%	28%	35%
Sharing someone else's personal photos or information without their permission	36%	39%	32%	32%	34%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

R3. How likely do you think each of the following is to happen to your child(ren) when they are online?

Vigilant Managers and Engaged Protectors feel prepared to prevent or respond to serious online risk events if they happen; Pragmatic Balancers are least prepared with a third saying they would need help



Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376

R5. Overall, how prepared do you feel to prevent or respond to a serious online risk if it happened to your child(ren)?

Engaged Protectors and Vigilant Managers are most familiar with the term child sexual abuse material (CSAM)

FAMILIARITY WITH CHILD SEXUAL ABUSE MATERIAL (CSAM) TERM					
	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Extremely / Very familiar	50%	43%	40%	56% AB	60% AB
Extremely familiar	20%	14%	19%	28% A	26% A
Very familiar	30%	29%	21%	27%	34% B
Moderately familiar	28%	32% D	33%	24%	24%
Not very familiar	12%	13% C	13%	7%	11%
Not at all familiar	10%	12% D	14% D	14% D	5%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
X1. How familiar are you with the term “child sexual abuse material” (sometimes called CSAM)?

Letters in BLUE indicates significant difference at 95% confidence level

Engaged Protectors are most likely to talk with their children when something concerning happens; Vigilant Managers block the individual or content

PARENT RESPONSE TO INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES

	SEGMENTS				
	TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Talked with my child about what happened	47%	37%	44%	54% A	61% AB
Blocked the individual or content	41%	32%	36%	61% AB	49% A
Reported the incident to a platform or service provider	37%	31%	31%	35%	48% AB
Adjusted parental controls or privacy settings	36%	32% B	18%	46% B	42% AB
Sought advice or support (e.g., professionals, online resources)	27%	27%	20%	17%	30%
Reported the incident to the police	25%	19%	20%	22%	35% AB
Reported the incident to the school	23%	22%	20%	22%	24%
Had another trusted adult speak with my child	22%	26%	16%	20%	19%
Something else	1%	1%	0%	4% BD	0%
No response – they handled it themselves	2%	4% CD	2%	0%	1%

Letters in BLUE indicates significant difference at 95% confidence level

Base (Those whose child has had exposure to concerning or inappropriate interactions): Total - 515, Pragmatic Balancers - 248, Social Risk Navigators - 45, Vigilant Managers - 46, Engaged Protectors - 176

X4. When your child(ren) experienced concerning or inappropriate online interaction, what was your response?

Pragmatic Balancers and Social Risk Navigators feel less confident about seeing the signs that their child is experiencing something concerning online

CONFIDENCE IN RECOGNIZING AN INAPPROPRIATE OR EXPLOITIVE ONLINE INCIDENT

	TOTAL	SEGMENTS			
		Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
I am very confident I would recognize it	35%	24%	31%	50% AB	45% AB
I could recognize most warning signs	29%	28%	20%	24%	33% B
I could recognize some warning signs	23%	29% CD	30% CD	15%	16%
I might notice something, but would be unsure	10%	15% CD	14% D	7%	4%
I would not recognize the signs	3%	4%	6%	3%	2%

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
X5. How confident are you in your ability to recognize signs that your child(ren) may be experiencing inappropriate or exploitive interactions online?

Concern about the child's reaction or about overreacting are top obstacles for Engaged Protectors and Pragmatic Balancers when it comes to dealing with a concerning incident; Pragmatic Balancers have the widest set of obstacles

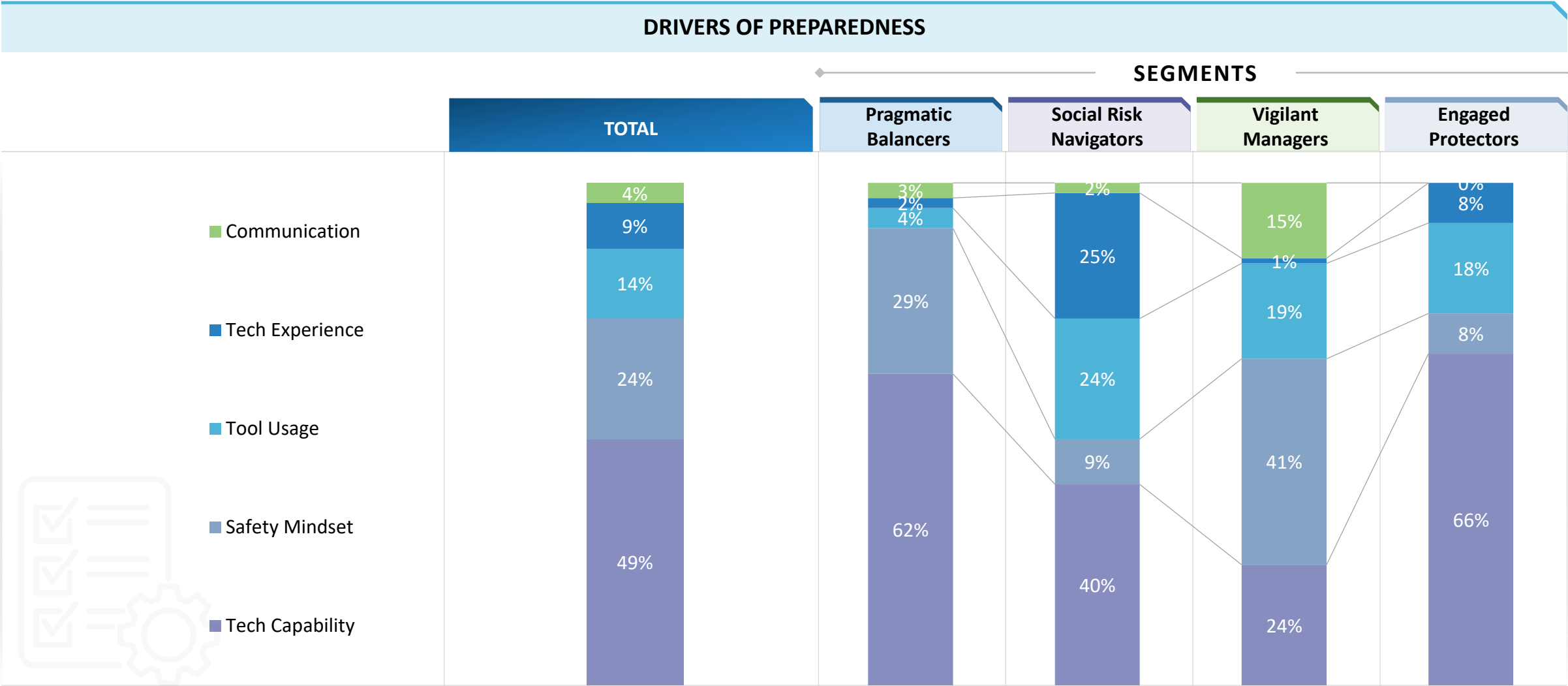
OBSTACLES TO DEALING WITH INAPPROPRIATE OR EXPLOITIVE ONLINE EXPERIENCES

		SEGMENTS			
	TOTAL	Pragmatic Balancers (A)	Social Risk Navigators (B)	Vigilant Managers (C)	Engaged Protectors (D)
Concern about my child’s reaction or trust	24%	25% C	19%	15%	29% BC
Concern about overreacting	23%	26% C	19%	16%	24%
Belief that my child would not tell me / would not want me to know	22%	24%	24%	21%	20%
Concern that others would judge my child or our family	15%	16% C	10%	7%	18% BC
Difficulty understanding the technology / platform	15%	18% BC	8%	6%	15% BC
Pressure from other parents to not disclose the situation	14%	17% BC	7%	9%	14% B
Not knowing where to report it	13%	15%	10%	12%	12%
Not knowing what steps to take	13%	13% C	13%	7%	14% C
Lack of time or attention	12%	16% BC	3%	6%	12% BC
Not knowing where to get help	10%	10%	11%	5%	13% C
Nothing would make it difficult	33%	22%	32% A	50% AB	41% A

Letters in BLUE indicates significant difference at 95% confidence level

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
X6. What, if anything, would make it difficult for you to address a situation involving inappropriate or exploitive online content?

Drivers of online safety preparedness vary significantly across parent segments



Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors - 376
Driver analysis using Johnson's Relative Weights methodology

Online risk is now an everyday parenting challenge, not an edge case.

Children's digital lives span multiple devices, apps and platforms, and exposure to inappropriate content, harmful interactions and exploitation is a meaningful concern for families.

Parents are engaged, but engagement does not always translate into preparedness.

Most are taking some steps to manage safety, yet confidence and capability vary considerably—especially among less tech-experienced parents.

The hardest challenge is balancing protection with trust, privacy and independence.

As children get older, effective safety becomes less about simply restricting access and more about maintaining communication while helping children navigate risk themselves.

Parents expect online safety to be a shared responsibility.

They see themselves as the primary line of defense, but also look to platforms and technology providers for stronger built-in safeguards, better controls, alerts and faster intervention.

There is no one-size-fits-all solution.

Families differ meaningfully in technical confidence, communication style, risk orientation and preferred level of oversight—pointing to a need for flexible, personalized approaches that combine technology with education and parent-child communication.

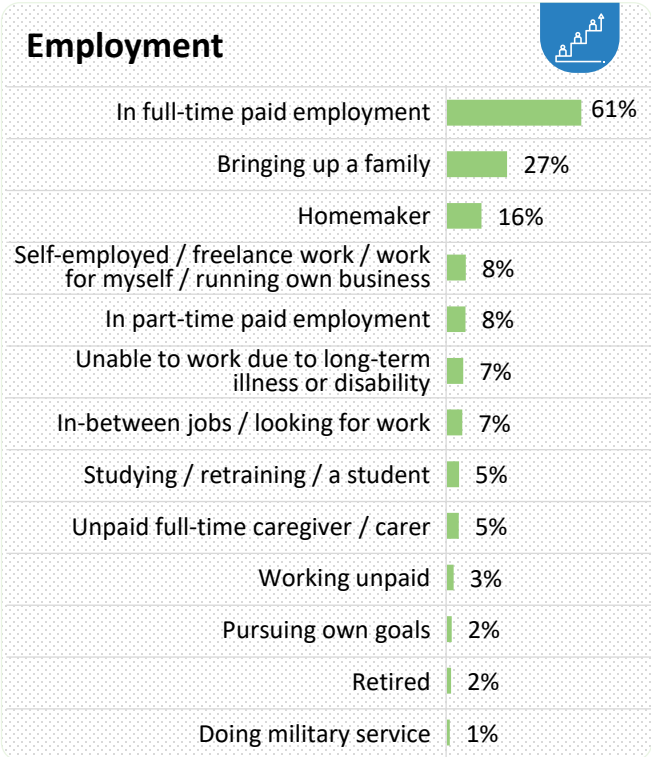
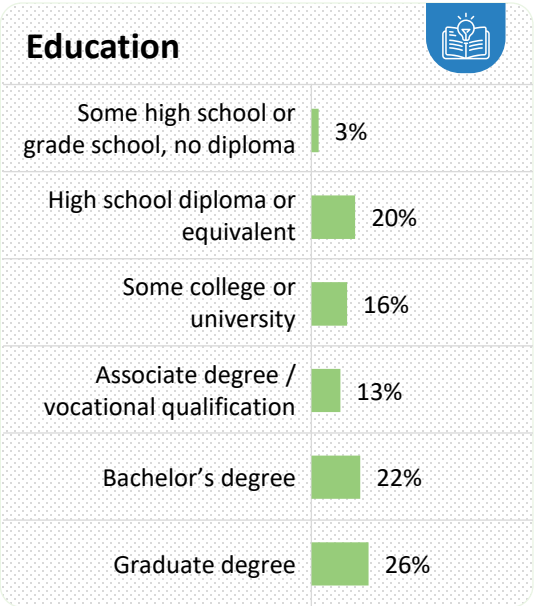
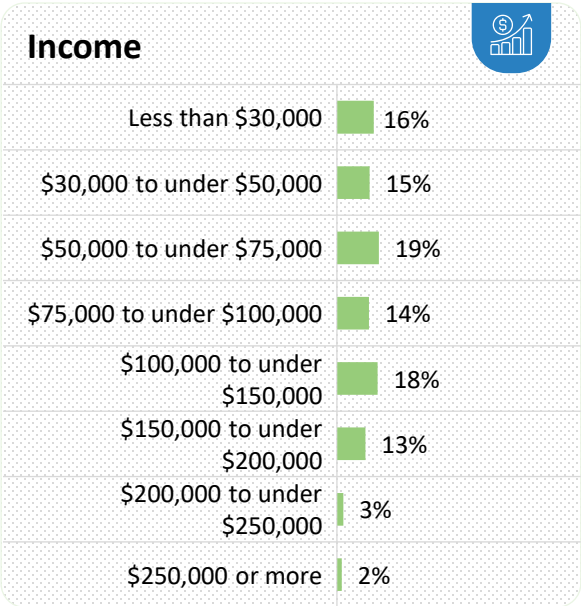
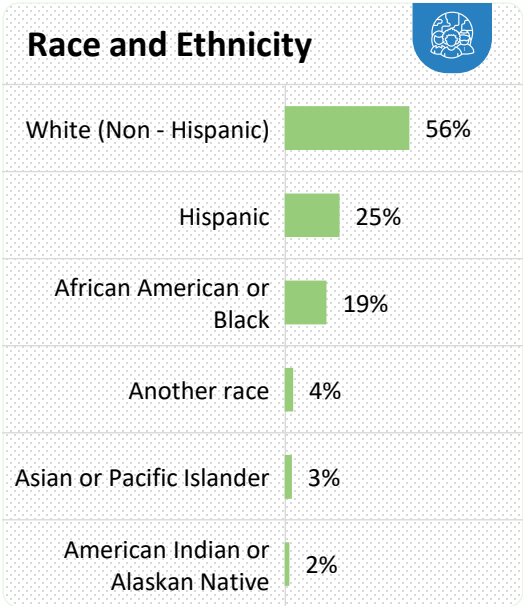
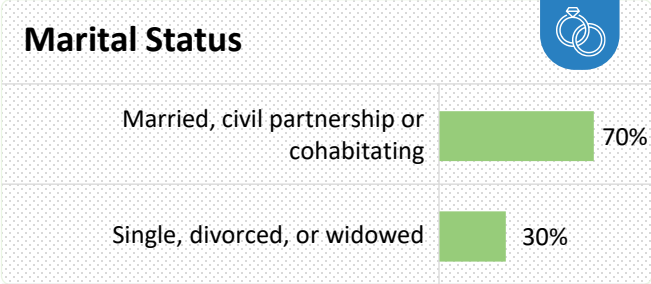
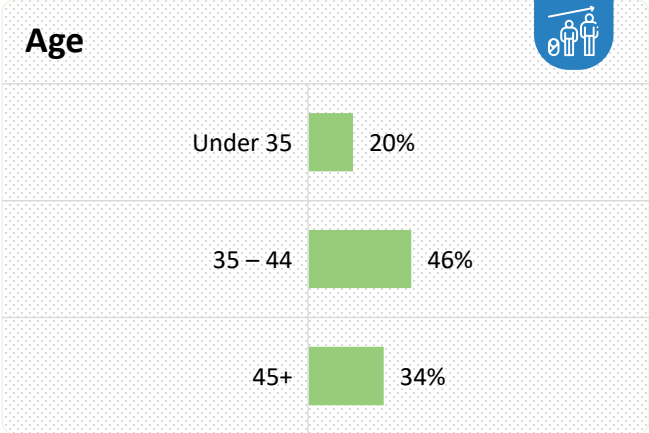
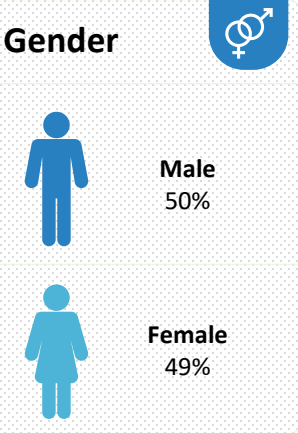




Appendix

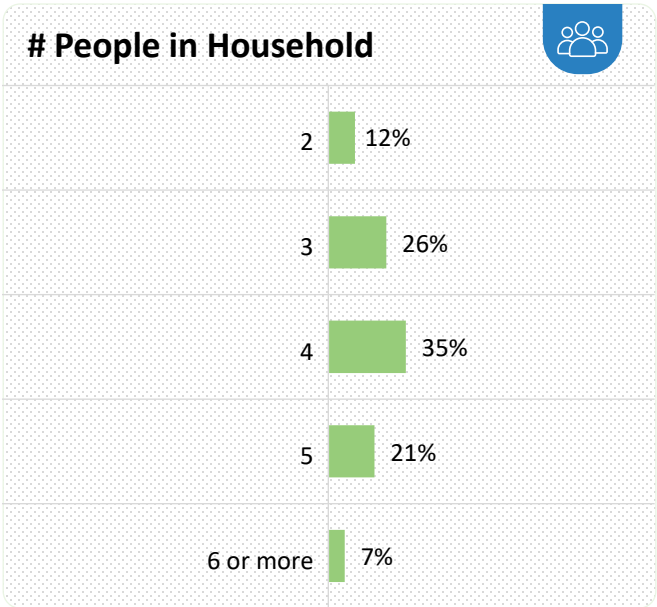


Sample Composition: Parent

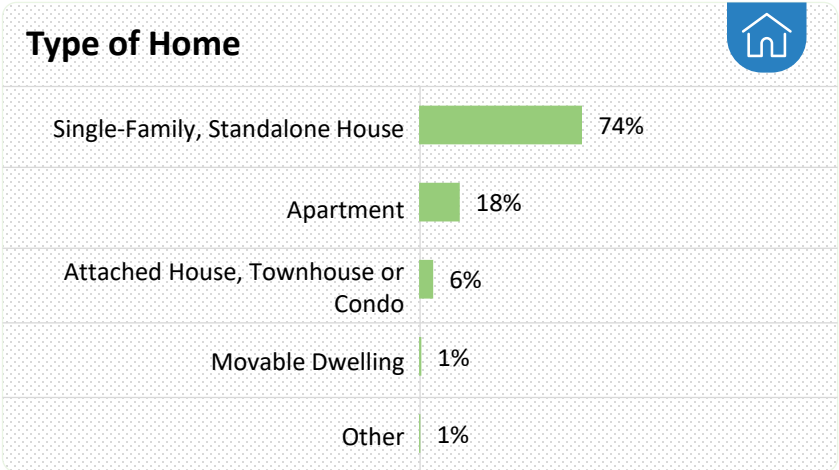
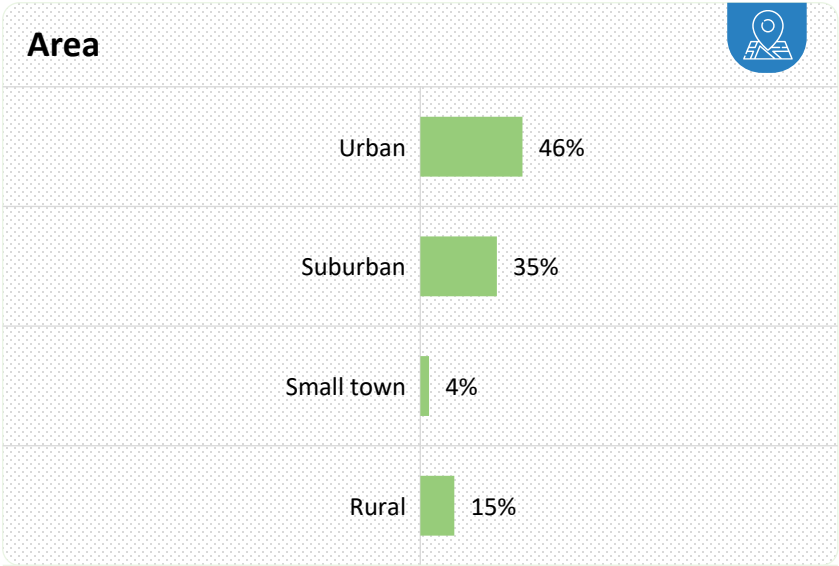
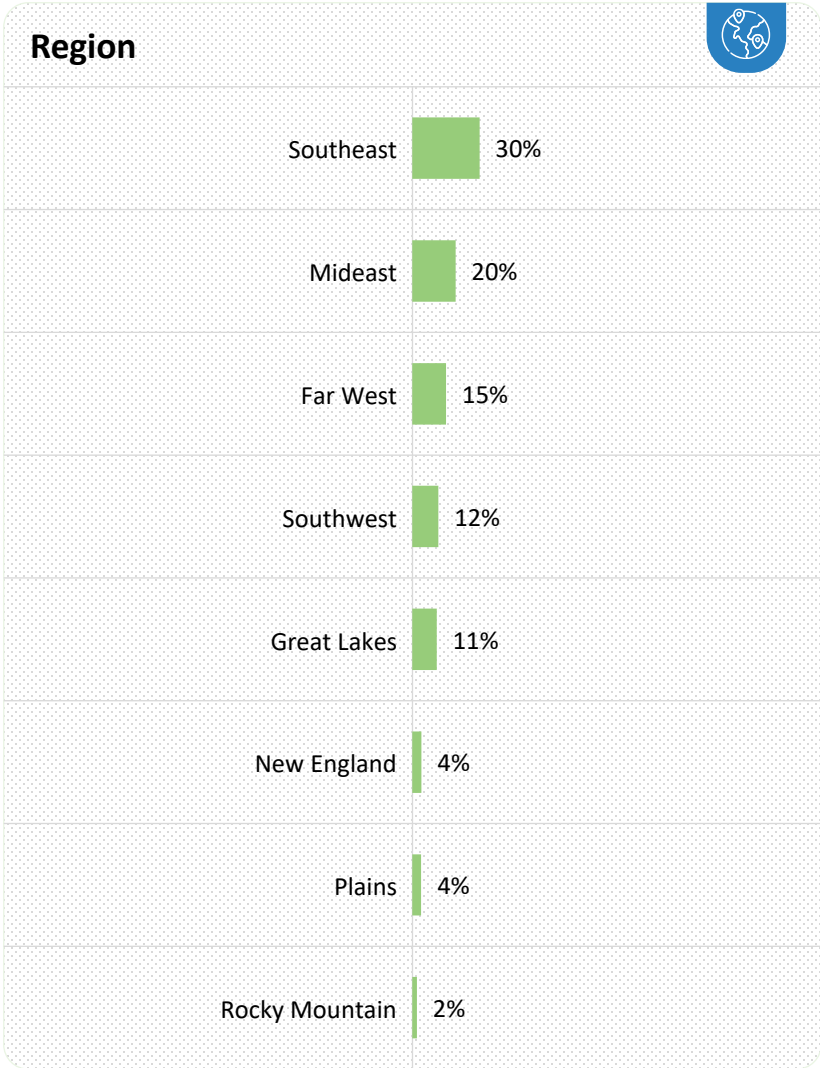


Base: Total - 1014
S02. Please record your gender. S04. What is your age?, S05. Which of these categories best represents your total yearly household income?, S06. Are you from Spanish, Hispanic or Latino background / origin?, S07. What is your race?, D3. What is your marital status?, D1. Which of the following describe you?, D2. What is the highest level of education you have completed?

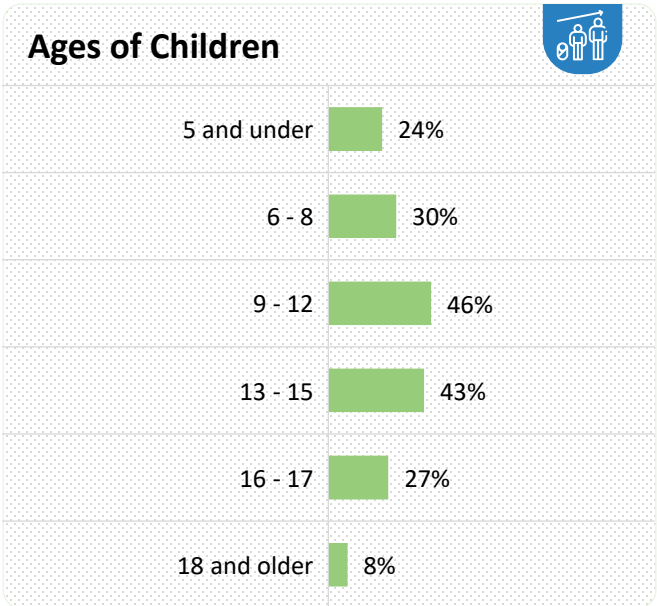
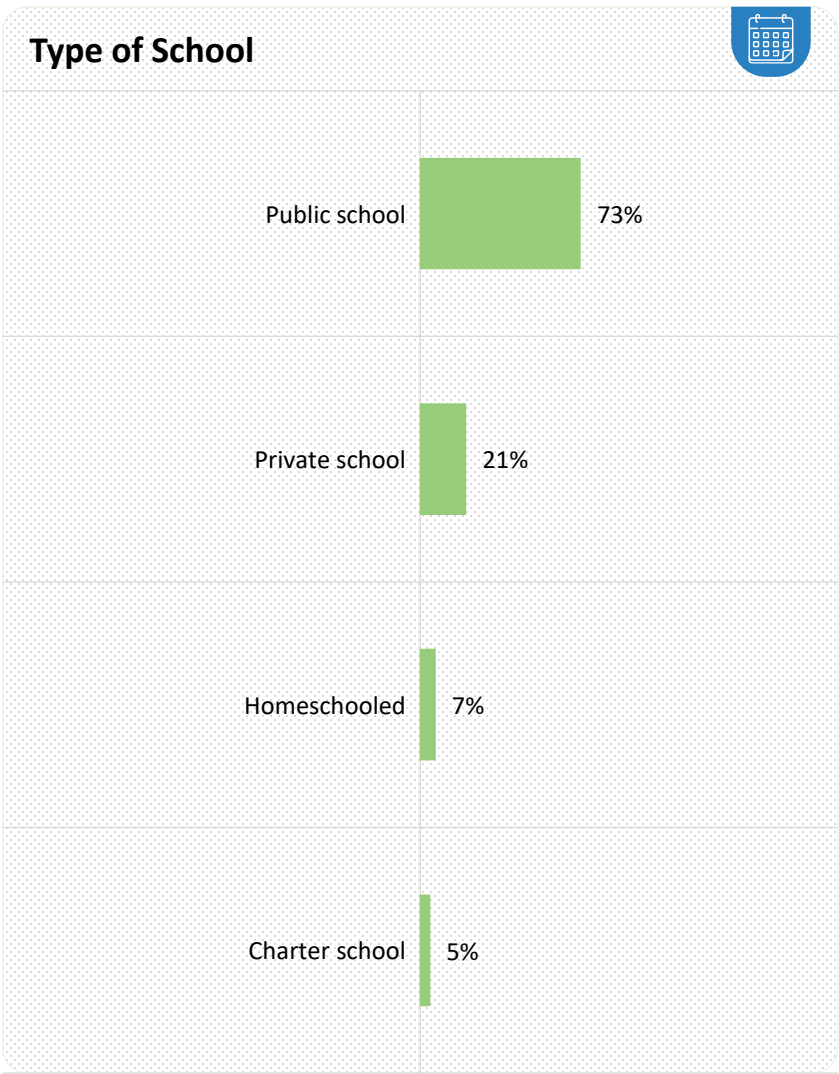
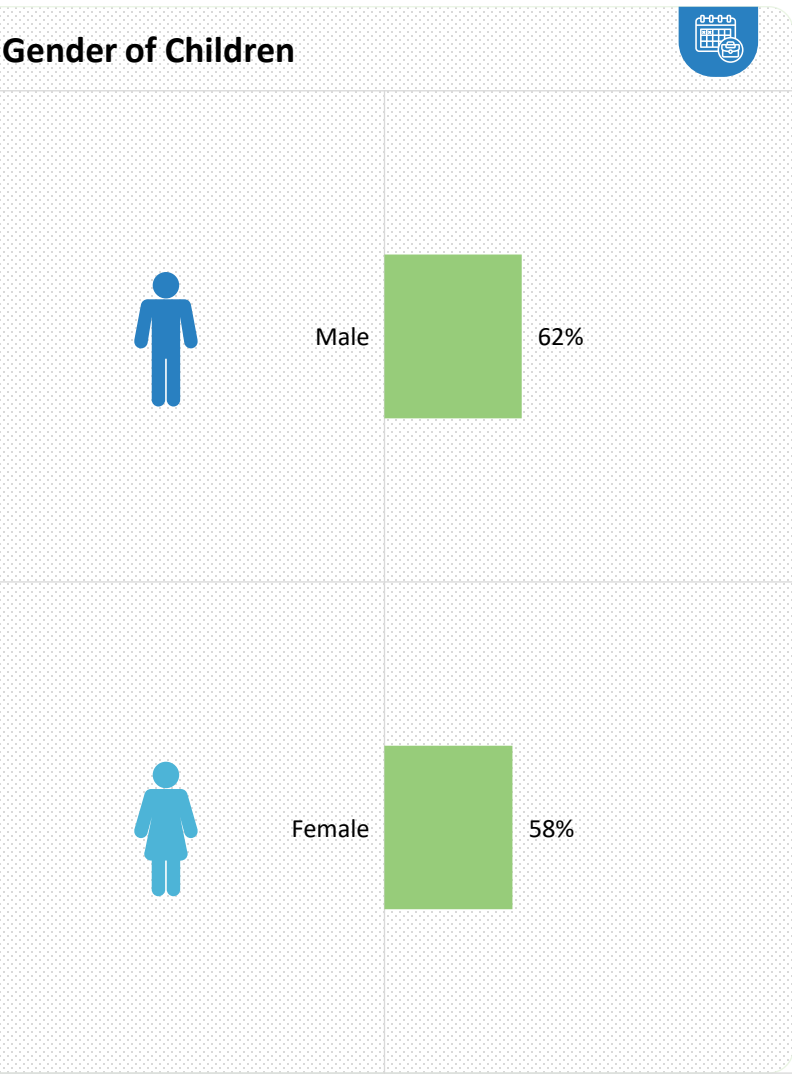
Sample Composition: Household



Base: Total - 1014
S08. In which region of the country do you live?, D6. Which best describes the type of area where you live?, D7. In which type of residence do you live?, D4. Including yourself, how many people live in your household?



Sample Composition: Children in Household



Base: Total - 1014
S10. What are the ages of the child(ren) in your household?, D8. Please record the gender(s) of the children in your household between the ages of 6-17, D5. What type of school(s) does your child(ren) attend?

An analytic method called Latent Class Cluster Analysis was used to uncover unique parent segments

LATENT CLASS SEGMENTATION			
		Latent Class Cluster Analysis (LCCA)	Traditional (<i>Factor-Cluster Analysis</i>)
	Classification	Probability based – classification into clusters based upon membership probabilities estimated directly from the model	Uses arbitrary distance or ad-hoc scales
	Number of Segments	Diagnostics, such as the Bayesian information criterion (BIC), allow estimating the correct / optimal number of segments	No statistical assistance in determining the number of segments
	Alternative Methods	LCCA picks up observations plus elements not observed in the data; LCCA models differ from the traditional by including one or more discrete unobserved variables	Cannot handle unobserved variables
	Modelling Assumptions	LCCA models do not rely on traditional modelling assumptions (linear relationship, normal distribution, homogeneity. etc.)	Assumptions often violated in practice to develop solution
	Mixed Scale Types	Allows all variable types (nominal, ordinal, continuous or any mixture) along with variables which have missing information	Only continuous
	Speed	Cluster and covariate (demographic) profiling can be done simultaneously and help improve the assignment of people to clusters - faster and no second stage	Segments must be described at a second stage using Discriminant Analysis or other related method
	Outcome Variables	Can be included in the model (i.e., likelihood purchase for different segments, in a customer segmentation study)	Cannot be included in the model

DETERMINANTS OF SEGMENTATION – WHAT DRIVES SEGMENT CLASSIFICATION

Tech Confidence and Controls I rely on others to set up or manage technology for me I can use devices and apps, but rarely change settings I can adjust basic settings (e.g., privacy, notifications) I regularly manage devices, apps, and settings on my own I set up, customize, and troubleshoot technology for myself and others I do not use any tools and have not tried any I do not use tools because they don't work well I use basic built-in controls (e.g., screen time limits) I use multiple tools but in a limited way I actively use and customize multiple tools to manage safety					
Risk and Safety Orientation Very low risk Low risk Moderate risk High risk Very high risk I have not given much thought to online safety for children I am somewhat aware of online risks, but do not take specific actions to manage them I pay attention to online safety and have some basic rules or controls in place I am very focused on online safety and actively monitor or manage my children's online activity I am extremely proactive about online safety and take extensive steps to protect them online					
Communication and Engagement I set clear rules and expectations about what is allowed I monitor and guide their behavior as needed I have open conversations and encourage them to make good decisions I mainly step in when issues arise I rely on my child(ren) to manage their own behavior I do not typically address this directly They would definitely not come to me They would probably not come to me They might come to me They would probably come to me They would definitely come to me Something I saw in the news or media Something that happened to my child Something that happened to another child School or external guidance Routine parenting conversations I don't typically initiate these conversations My child brings it up / has questions					
Online Exploitation Exposure Not likely at all Not very likely Somewh at likely Very likely Extremel y likely This has already happened to my child Received or been shown inappropriate sexual images or content Been asked to share inappropriate sexual photos or videos of themselves Been asked to share inappropriate sexual photos or videos of other children Been asked to keep an online interaction secret from parents or adults Been contacted in a way that made them feel uncomfortable or unsafe Interacted with someone who later seemed suspicious or not who they claimed to be Received threats of harm or disclosure if they did not share / do something explicit					
Solution Decision Priorities How important it is to the child Ability to control / monitor activity Reputation / trust of the app, site, or game Type of app / game / content Who my child can interact with					

T4. Which of the following best describes your experience with technology (e.g., devices, apps, settings)?, B1. Which of the following best describes your current use of tools to manage your children's online activity?, T6. Overall, how much risk do you think your child(ren) is exposed to when online (using the internet, apps, smart devices, etc.)?, R1. Which of the following statements best reflects your views regarding online safety for your child(ren)?, B8. Which of the following statements best describes how you approach conversations about online safety with your child(ren)?, B9. How likely do you think your child(ren) is to come to you if they experience something concerning online?, B11. What prompts conversations about online safety with your child(ren)?, X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?, X3. To your knowledge, has your child(ren) ever experienced any of the following online?, R7. How important do you think each of the following factors are when it comes to choosing apps or other online activities used by children?

SEGMENTATION DIMENSIONS: VARIANCE FROM AVERAGE

		SEGMENTS							
		Pragmatic Balancers		Social Risk Navigators		Vigilant Managers		Engaged Protectors	
 Tech Confidence and Controls	I regularly manage devices, apps, and settings on my own	-8%		-4%		-3%			11%
	I set up, customize, and troubleshoot technology for myself and others	-13%		-3%		3%			14%
	I actively use and customize multiple tools to manage safety	-20%		-9%		20%			18%
 Risk and Safety orientation	Perceive low or very low level of risk when children are online	-4%		3%		11%			0%
	I am extremely proactive about online safety and take extensive steps to protect them online	-13%		-4%		21%			9%
 Communication and Engagement	I set clear rules and expectations about what is allowed	-15%		2%		12%			12%
	Children would definitely come to me with concerns	-20%		0%		21%			15%
	Conversations prompted by: Routine parenting discussions	-19%		3%		4%			18%
 Online Exploitation Exposure	Unlikely child will be exposed to inappropriate sexual content	-4%		5%		14%			-1%
	Child has been exposed to specific types of inappropriate or exploitive online experience		10%	-9%		-10%		-6%	
 Solution Decision Priorities	Who the child can interact with is important in choosing apps	-5%			31%	-8%			-1%
	Ability to control / monitor activity is important in choosing apps	-5%		-7%		26%			-1%

Base: Total - 1014, Pragmatic Balancers - 413, Social Risk Navigators - 108, Vigilant Managers - 117, Engaged Protectors – 376
T4. Which of the following best describes your experience with technology (e.g., devices, apps, settings)?, B1. Which of the following best describes your current use of tools to manage your children’s online activity?, T6. Overall, how much risk do you think your child(ren) is exposed to when online (using the internet, apps, smart devices, etc.)?, R1. Which of the following statements best reflects your views regarding online safety for your child(ren)?, B8. Which of the following statements best describes how you approach conversations about online safety with your child(ren)?, B9. How likely do you think your child(ren) is to come to you if they experience something concerning online?, B11. What prompts conversations about online safety with your child(ren)?, X2. How likely do you think it is that your child(ren) may encounter or be exposed to inappropriate sexual content or exploitation online?, X3. To your knowledge, has your child(ren) ever experienced any of the following online?, R7. How important do you think each of the following factors are when it comes to choosing apps or other online activities used by children?

- To better understand what most strongly influences parents’ sense of preparedness to manage online safety risks, driver analysis was conducted using Johnson’s Relative Weights methodology.
- The dependent variable measured perceived preparedness to prevent or respond to serious online safety risks, while independent variables included online safety mindset, technical confidence, use of safety tools, technology experience, and communication approach.



Johnson's Relative Weights (% of explained variance) was computed separately within each segment, using the 5 leading drivers. The fact that the top driver changes by segment is the key finding: preparedness is built differently in different segments.

Segment	n	Model R ²
OVERALL (all parents)	1014	0.437
Pragmatic Balancers	413	0.316
Social Risk Navigators	108	0.519
Vigilant Managers	117	0.461
Engaged Protectors	376	0.384

THANK YOU



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